

State Council of Higher Education for Virginia Goals and Strategies Memo

Strategic Plan Development Project

October 17, 2014

Contents

Executive summary.....	5
Introduction to the Goals and Strategies Memo	5
Assumptions about the plan that are included in our approach	5
Ongoing development and refinement of the goals, strategies, initiatives and measures.....	7
Mission and vision statements as of September 16, 2014	7
Strategic plan framework, showing four goals as of September 16, 2014	8
Goal (1) Provide Affordable Access for All	8
Goal (2) Optimize Student Success for Work and Life	9
Goal (3) Drive Change and Improvement through Investment and Innovation.....	9
Goal (4) Advance the Economic and Cultural Prosperity of the Commonwealth and its Regions	9
Strategy insights.....	10
Study of approaches from other states and from Virginia institutions	11
Examples from Virginia’s institutions of higher education	11
Virginia can chart a bold, distinctive course	11
Approach to developing goals and strategies for higher education in Virginia.....	13
Key points from the quantitative data analysis and policy scan.....	14
Gathering information from the public	16
Value of the regional visits and focus groups	16
Electronic Data Collection Instruments, Public and Private	19
Identification of themes and success factors.....	21
Culminating in Sensemaking	23
The strategic plan framework.....	24
Using this framework to build consensus	25
Draft goals and strategies for higher education in Virginia	29
Goal 1.0—Provide Affordable Access for All.....	29
Strategy 1.1. Expand early outreach programs and build the culture of learning.....	30
Strategy 1.2. Cultivate accessible pathways and seamless articulation/transfer.....	31
Strategy 1.3. Achieve affordable net price and differentiated tuition	31
Strategy 1.4. Accelerate completion and manage the total cost of completion	32
Goal 2.0—Optimize Student Success.....	33
Strategy 2.1. Improve readiness; reduce need for remediation.....	34
Strategy 2.2. Produce graduates who are prepared to live productive, meaningful lives	34

Strategy 2.3. Improve certificate and degree completions and achieve targets for certificate/degree production..... 34

Strategy 2.4. Enhance degree completion and lifelong learning for adults 35

Goal 3.0—Achieve Sustainable Excellence 36

Strategy 3.1. Continue to invest in the abiding elements of Virginia postsecondary education excellence..... 36

Strategy 3.2. Invest in activities critical to future competitiveness..... 37

Strategy 3.3. Commit to greater resilience, responsiveness and productivity in Virginia postsecondary education..... 38

Goal 4.0—Advance the economic prosperity of the Commonwealth..... 40

Strategy 4.1. Build a competitive, well-educated and trained workforce at all levels 40

Strategy 4.2. Provide for the economic development of communities and regions of the Commonwealth..... 41

Strategy 4.3. Support research that creates new knowledge and leads to commercialization of new products and ventures 41

Strategy 4.4. Encourage and expand public service that meets the needs of the Virginia economy 42

Goal 5.0—Frame a compelling narrative for postsecondary education 42

Strategy 5.1. Mobilize key leadership to proclaim the need for public support of Virginia postsecondary education..... 42

Strategy 5.2. Develop a communication plan around the persuasive compelling narrative..... 43

Strategy 5.3. Utilize multiple channels to engage stakeholders..... 43

Impacts of Key Elements Across the Five Goals..... 44

Appendix 1: Sample Goals from Other State Board Plans 50

Appendix 2: Sections from Institutional Strategic Plans for Virginia Universities and Select Community Colleges, as of July 2014 56

Appendix 3: Handout with Key Interview and Focus Group Questions..... 74

Appendix 4: List of Hosts for On-Site Regional Visits 76

Appendix 5: Ideas and Challenges Identified through Interviews and Focus Groups 77

Appendix 6: Quotes from the Private Data Collection Instrument 82

Appendix 7: Sample of How Initiatives Align with Strategies and Goals within the Framework 85

Appendix 8: Possible Areas for Measurement to Assess Progress toward Goals and Strategies 86

List of tables

TABLE 1: VARIED PERSPECTIVES ON THE COMMON THEMES 18
TABLE 2: RESPONSES TO WHAT IS URGENT AT THEIR INSTITUTION, FROM HIGHER EDUCATION EMPLOYEES..... 21
TABLE 3: EFFECTS ACROSS THE FIVE GOALS OF FOUR KEY ELEMENTS: AFFORDABLE NET PRICE, TUITION DIFFERENTIATION
STRATEGY, PRODUCTIVITY IMPROVEMENT, COST REDUCTION..... 45
TABLE 4: FIVE STATE PLANS WITH GOALS 50
TABLE 5: THREE STATE PLANS WITH BIG IDEAS, STRATEGIC IMPERATIVES OR STRATEGIC DIRECTIONS..... 51

List of figures

FIGURE 1: STRATEGY INSIGHTS..... 10
FIGURE 2: THE DESIGN, DIVERGE, CONVERGE, ALIGN APPROACH..... 13
FIGURE 3: ILLUSTRATION OF THE FUTURING FRAMEWORK..... 17
FIGURE 4: FIVE THEMES AND THEIR SUCCESS FACTORS 22
FIGURE 5: PROPOSED FRAMEWORK FOR VIRGINIA'S STRATEGIC PLAN FOR HIGHER EDUCATION 24

Executive summary

The State Council of Higher Education for Virginia (SCHEV) has embarked on the development of a statewide strategic plan for higher education in Virginia. SCHEV has contracted with JBL Associates (JBLA), a research firm, to assist in the process. This document is one of a number of reports prepared by JBL Associates in fulfillment of its contract to assist SCHEV.

The memo builds upon the Gap Analysis to discuss priorities and barriers identified by constituents, highlight potential approaches to move the Commonwealth forward from local and national examples and introduce a framework for building consensus around clear, practical goals with suggestions for specific strategic goals. This memo will serve as the basis for the strategic goals portion of the final report, and will start conversations that inform and shape the final strategic goals. Other reports completed as part of this project include a Data Memo, a Policy Scan Memo, an Organizational Audit Memo and a final report. As they are finalized, these documents and related updates will be posted on the SCHEV Strategic Plan webpage, <http://www.schev.edu/SCHEV/StrategicPlan.asp>.

Introduction to the Goals and Strategies Memo

The Goals and Strategies Memo presents the findings from research as well as synthesized insights developed by the project team, including:

- **Strategic Insight** – How Virginia postsecondary education can establish an effective and sustainable strategy;
- **Input about Priorities and Barriers** – Insights from data analysis, regional visits, electronic data collection instruments, phone interviews and Sensemaking exercises;
- **What Other States and Virginia Institutions Are Doing** – Exemplary practices from other states and Virginia’s institutions and how Virginia can chart a fresh, distinctive course;
- **Framework for Building Consensus** – Introduction to the strategic plan framework, roles of SCHEV Staff and Council involvement and recommendations for outreach and creating buy-in; and
- **Draft Goals/Strategies within the Consensus-Building Framework** – Suggested portfolio of goals and supporting strategies with potential initiatives and metrics.

Assumptions about the plan that are included in our approach

This Strategy Memo features several important characteristics and assumptions:

- **The plan will be inclusive.** The statewide strategic plan is for all post-secondary education in Virginia, including all public, private and for-profit institutions.
- **The statewide plan should stand alone, regardless of SCHEV.** This plan is about Virginia postsecondary education. SCHEV, and the Executive Branch of Virginia State Government, have important roles to play in framing and executing this plan. However, the institutions bear primary responsibility for implementing many of the strategies, with SCHEV playing a supporting role.

- ***Mission, Vision, Values, Goals and, sometimes, Strategies should have lasting power.***
If properly constructed, mission, vision, goals and strategy can be continuously refined, but should also have lasting power and appeal to succeeding administrations. This enduring quality of the upper levels of the plan is a key to the successful execution of strategies over time.
- ***Initiatives and measures are where everyone has the opportunity to contribute, align, emphasize and champion.*** Initiatives are developed and implemented over time. Strategic Plans that are overly prescriptive at the initiative level are soon outdated and quickly put on the shelf. In contrast the process of revising metrics and targets on a regular basis is a mechanism for supporters and champions to give input and build coalitions.
- ***The framework should be dynamic and flexible enough to accommodate an unknown future.***
Strategic plans should be carefully framed to be flexible and responsive to the dynamic changes in the environment so they may have lasting effect.

"... instead of the aristocracy of wealth, of more harm and danger, than benefit, to society, to make an opening for the aristocracy of virtue and talent, which nature has wisely provided for the direction of the interests of society, and scattered with equal hand through all its conditions, is essential to a well-ordered republic."

- Thomas Jefferson in a letter to John Adams, 1813

Ongoing development and refinement of the goals, strategies, initiatives and measures

An interim draft of this memo was completed on September 2, 2014. Subsequently, the goals, strategies, initiatives and measures first proposed in the following pages have been further refined in collaboration with SCHEV Council and Staff, the Council of Presidents and other key stakeholders. This first section presents the results of that process, which were ultimately presented to SCHEV Executive Committee and the Council of Presidents on September 15th and the full Council on September 16th, while the remainder of this memo presents the goals and strategies that were original proposed and subsequently revised. The version in this section was the end result of an intensive effort by the project team to identify the goals and strategies most vital to the success of higher education in Virginia and to focus the strategic plan intently upon them.

After this first section, the memo as originally prepared is presented in its entirety. It included five strategies around the themes of student access, student success, institutional excellence, economic development and framing a compelling narrative. While these were eventually refined to four strategies around access, success, institutional improvement and economic prosperity, it is important for participants in, and observers of, the planning process to review both the original and current version to fully understand the background and evolution of the plan and the extent of the thinking and effort that went into producing the final version. The components of the strategic plan will continue to evolve in response to the needs of the Commonwealth. This Memo, finalized in mid-September of 2014, will serve as a record of the development of this plan and as a resource for those seeking additional information during the plan's future development and implementation.

Mission and vision statements as of September 16, 2014

DRAFT

Mission

Higher education in Virginia will advance postsecondary learning, research and public service that enhance the civic and financial health of the Commonwealth and the well-being of all its people.

DRAFT

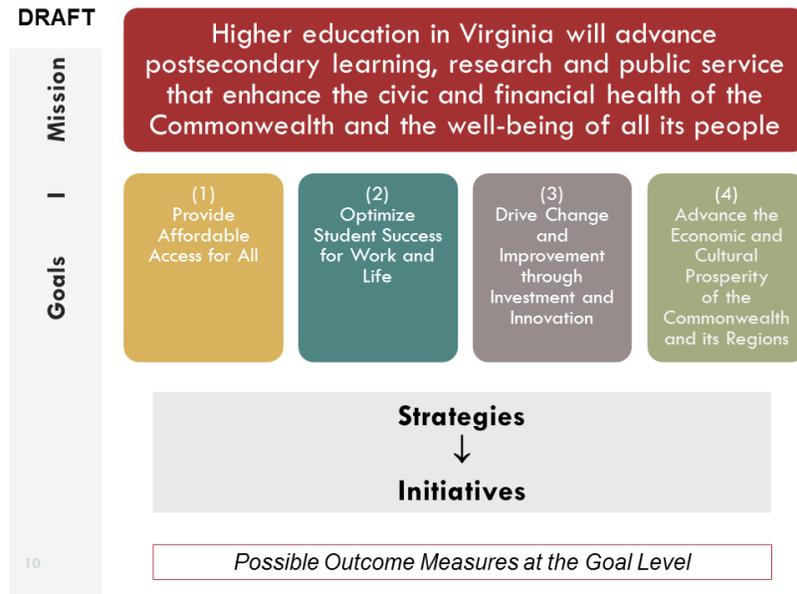
Mission: Higher education in Virginia will advance postsecondary learning, research and public service that enhance the civic and financial health of the Commonwealth and the well-being of all its people.

Goals: Provide a world-class education for all; Advance the Economic and Cultural Prosperity of the Commonwealth and its Regions

VISION

Higher Education will transform the lives of Virginians, our communities and our Commonwealth.

Strategic plan framework, showing four goals as of September 16, 2014



The strategies presented with the four goals on September 16, 2014 are listed below. While a handful of high-level measures were discussed for these goals, additional measures continue to be developed and refined and are not included here. Please see Appendix 8: Possible Areas for Measurement to Assess Progress toward Goals and Strategies for examples of additional measures, many of which are still relevant and applicable at the strategy and initiative levels.

As mentioned above, the goal to *frame a compelling narrative for postsecondary education* from the original proposal has been removed in this version. The framing of the narrative to gather support for higher education among stakeholders will be incorporated into the other four goals at the initiative level, where appropriate.

Goal (1) Provide Affordable Access for All

- 1.1. Expand outreach to K-12 and traditionally underserved communities to foster cultures of learning
- 1.2. Improve the college readiness of all students
- 1.3. Cultivate pathways into college for traditional, non-traditional and returning students
- 1.4. Achieve affordable net price for all students and their families

Goal (2) Optimize Student Success for Work and Life

- 2.1. Provide effective remediation, academic and student services infrastructure to improve completion
- 2.2. Produce graduates prepared to live productive, meaningful lives
- 2.3. Improve timely completion rates for certificates and degrees
- 2.4. Engage adult learners and veterans in degree completion and lifelong learning

Goal (3) Drive Change and Improvement through Investment and Innovation

- 3.1. Identify and implement a sustainable funding model
- 3.2. Lead institutional innovation and productivity in all institutions
- 3.3. Achieve greater responsiveness, resilience and readiness for future disruptions
- 3.4. Create a diverse environment in which discovery and creativity thrive
- 3.5. Enhance higher education leadership, governance and accountability at all levels

Goal (4) Advance the Economic and Cultural Prosperity of the Commonwealth and its Regions

- 4.1. Build a competitive, well-educated/trained workforce - at all levels and for all regions
- 4.2. Become a model of business incubation and catalyzing entrepreneurship
- 4.3. Develop world-class research centers and talent hubs
- 4.4. Expand participation and engagement in public service and institutional service to the community

Strategy insights

Strategy is focused, consistent behavior over time, adapting in response to emerging conditions.

-Henry Mintzberg, leading practitioner of strategic management

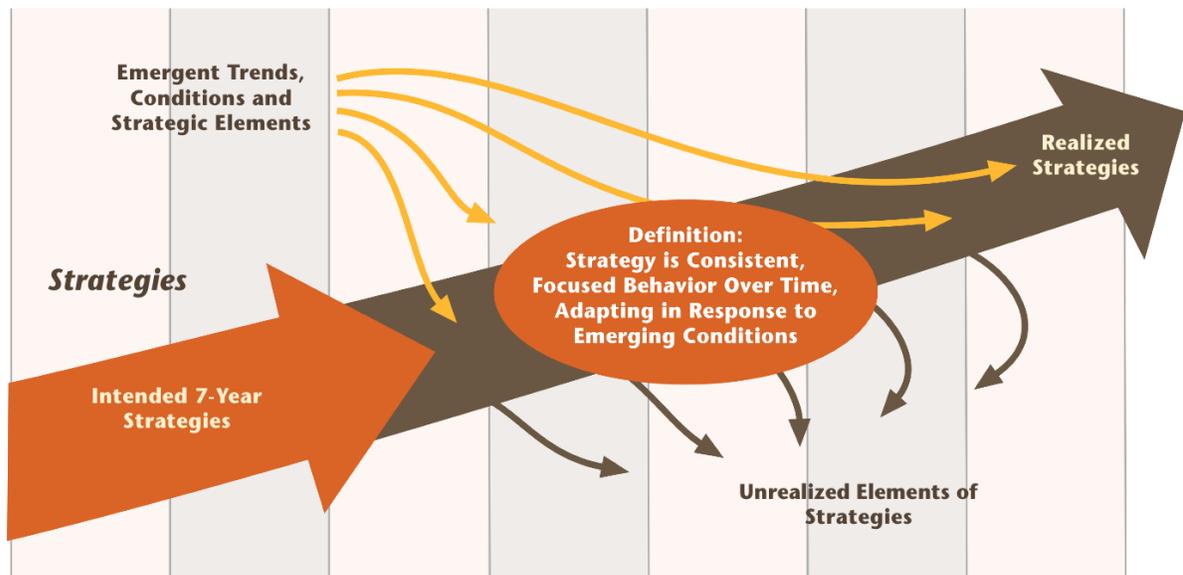
The strategic plan for higher education in Virginia should aspire to frame Goals and Strategies that have strong bipartisan appeal and can be continued, with refinement, across changes in gubernatorial administrations. The Goals and Strategies drafted below have the potential to achieve this appeal, with refinement and input from stakeholders.

The statewide strategic plan attempts to achieve these three aims simultaneously:

- 1) Using the strategic plan to frame the full range of key strategic issues facing higher education in the Commonwealth in the 21st century;
- 2) Encouraging SCHEV to focus on its coordination and collaboration roles and the selected active functions likely to produce valuable results; and
- 3) Influencing institutions and other players by creating incentives for them actively pursue desired initiatives under the goals and related strategies.

A strategic plan that successfully achieves these aims will position the Commonwealth for consistent, focused and sustained effort in support of its postsecondary network and all the contributions postsecondary education makes to the Commonwealth's economic prosperity and well-being.

Figure 1: Strategy insights



Study of approaches from other states and from Virginia institutions

Strategic plans were compiled from other state higher education governing and coordinating boards and from Virginia's institutions. These plans were then reviewed for trends in plans themselves as well as with respect to understanding the trends and developments that other states and Virginia's institutions expect in the future. As a reference, selected examples that informed the planning process and the development of Virginia's statewide strategic plan are included in Appendix 1: Sample Goals from Other State Board Plans.

Examples from Virginia's institutions of higher education

Summary information from specific sections of several of the Virginia institutional strategic plans is provided in Appendix 2: Sections from Institutional Strategic Plans for Virginia Universities and Select Community Colleges, as of July 2014. As can be seen, while some plans include the gamut elements typically found in strategic plans (Vision, Values, Mission, Goals, Strategies and Initiatives/Actions), others use different terminology (like Challenges, Responding to Challenges, Directives, Core Qualities, Priorities and more). Regardless of the terminology used, there are many opportunities to identify synergies between what the institutions are anticipating and doing and what the statewide strategic plan will seek to accomplish.

Virginia can chart a bold, distinctive course

The efforts of other states and Virginia institutions have provided many useful insights and ideas in the process of creating a statewide strategic plan for Virginia. The best of these will be incorporated into the goals and strategies, but Virginia has the opportunity to chart an even bolder, more distinctive course. Virginia can capitalize on its reputation as "The Old Dominion State," appropriately respectful of traditional values and standards of educational quality, yet willing to re-chart its course in light of 21st Century imperatives. This Strategy and Goals Memo articulates a compelling combination of mission, vision, goals and strategies that will achieve the transformations of individuals, communities and the Commonwealth needed for prosperity and well-being in the 21st Century.

Embracing this transformational vision can rekindle and reaffirm the enthusiasm of the citizens of the Commonwealth for public investment in Virginia postsecondary education. In order to achieve prosperity and well-being in the 21st Century, greater investment and support are imperative for the learning, research and public service functions of colleges and universities. These resources must come from a variety of sources beyond state public appropriations, to include: business, community organizations, philanthropies and other stakeholders. A compelling narrative and commitment to its execution can help mobilize these essential levels of support.

A bold, distinctive course will also attract alignment by the leadership of Virginia's colleges and universities. The strength of Virginia's constellation of diverse institutions has always been based on differentiated excellence. Many of the strategies recommended by the plan require distinctive regional solutions enabled by active collaborations and public/private partnerships. Examples of such partnerships and collective action are currently gestating in Virginia. They will be even more imperative in the future.

A bold, distinctive course will also require more diverse and active roles and competencies for the State Council for Higher education in Virginia (SCHEV). As part of the strategic planning process, an organizational audit is being conducted as a way to position SCHEV to fulfil these responsibilities and to send a clear sign of SCHEV's commitment to accomplishing its mission.

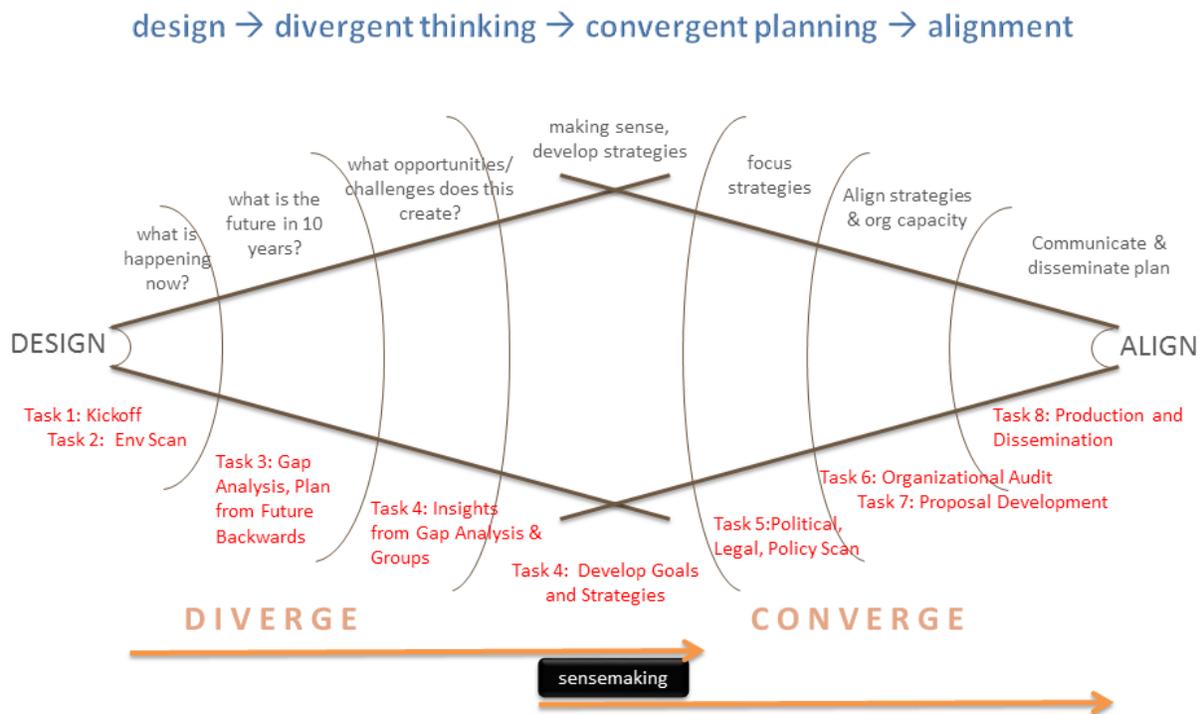
Approach to developing goals and strategies for higher education in Virginia

Figure 2, below, illustrates the Divergent Thinking, Convergent Thinking approach used in this process. The approach begins with DESIGN, which includes asking questions about what is happening now, what will happen in the future and what opportunities and challenges will these create? (This process is called a Futuring Framework, which will be discussed in more detail below.) Answers to those questions can be found by conducting a number of quantitative analyses (see the Data Analysis Memo, the Gap Analysis memo, the Policy Scan Memo and the Public Data Collection Instrument Memo) and by collecting qualitative data from key stakeholders across the Commonwealth.

At the center of the graphic lies the Sensemaking phase, where the convergence process begins to focus on goals and strategies (as well as SCHEV’s organizational capacity to help the state realize these goals and strategies), and ultimately—alignment reached—where communication and dissemination of the plan begins. This Memo, and the concurrent Organizational Audit Memo, represents the beginning of the convergence phase in the development process for the statewide strategic plan.

Takeaways from the implementation of this approach are discussed below in greater detail, as is the process by which these steps have culminated in the identification of Key Themes and the development of the draft Vision, Mission, Goals and Strategies.

Figure 2: The design, diverge, converge, align approach



Key points from the quantitative data analysis and policy scan

Key findings from the quantitative data analysis reports that were incorporated into the ultimate draft goals and strategies are summarized in this section. Readers are encouraged to refer to the other memos for more detailed analysis and discussion of these points.

- 1) **Regional Differences.** For strategic purposes, Virginia must be understood as a collection of distinctive regions, each of which is important to the Commonwealth's success. The Northern Virginia region dominates in terms of population, wealth, economic vibrancy, education and income. The rural regions in the south, west and east have rich agricultural traditions, but less growth and need different solutions than do the cities and suburbs of Washington, Richmond and Virginia Beach. In terms of income differences, the average family income in Northern Virginia is \$102,198, while in the Southwest, it is \$35,819 (U.S. Census Bureau, Median Income, 2008-2012). The cultural differences in the Commonwealth create opportunities for the Commonwealth's institutions, but income differences across the state present policy challenges in terms of affordability and student financial aid.
- 2) **Changing Demographics.** With respect to the college-age population, slow to no growth is expected between now and 2020, but the Hispanic/Latino college-age population is expected to grow at a relatively high rate. The challenge (and opportunity) this creates for higher education is that members of the Hispanic/Latino population are currently the least likely among racial/ethnic groups to *enroll* in postsecondary education. Furthermore, with respect to the adult population, the two largest groups of adults by education level in Virginia are those whose highest level of attainment is either high school or some college. This creates a strategic opportunity for Virginia's institutions to foster completion among adult learners.
- 3) **Affordability.** Virginia is a high-tuition, middle-aid state. There are many ways in which affordability could be improved, and the need will grow unless decisive action is taken soon. We find that the public colleges and universities with the fewest Pell Grant recipients and the highest tuition provide the lowest net price for low-income students and graduate students with the lowest loan balances. Meanwhile the public colleges and universities with the most Pell Grant recipients have lower published tuitions but have a higher net price for low-income undergraduates and the highest loan balances for graduate students. This has direct implications for efforts to provide access to postsecondary education to low-income students and their families. Furthermore, these loan burdened students may then be impeded from starting families, launching businesses and owning homes.
- 4) **Graduation Rates.** On-time graduation rates (four-years) among our public four-year institutions range from 85 percent to 11 percent. Six-year graduation rates range from 93 percent to 34 percent. Virginia's two public historically black colleges and universities (HBCU) have the lowest graduation rates. Virginia's public two-year institutions also showed variation in total graduation and transfer-out rates, from 27 to 40 percent, with large swings in the proportion of students who graduated versus those who transferred-out. Among private four-year institutions, some standouts graduated over 80 percent of students within 6 years, while

others lagged, graduating less than 40 percent in the same time. Much of this variation can be attributed to difference of mission between institutions. However, many, especially those serving the most disadvantaged populations, have room for improvement as part of an effort to boost student success.

- 5) **Financial Sustainability.** Data were reviewed on state support for higher education from the State Higher Education Executive Officers Association (SHEEO) that compare public full-time equivalent (FTE) enrollment, educational appropriations and total educational revenue per full-time equivalent student in Virginia from fiscal year 1988-2013. These data revealed that the total educational revenue per FTE increased by only \$982 over the 15-year period (from \$11,076 to \$12,058) and the share provided by state appropriations dropped from 70.1 percent in 1988 to 37.6 percent in 2013. The decrease in state appropriations as a share of total revenue necessitates that other sources, such as students and families, are paying a higher share of their educational costs through tuition and fees. These data underscore public concern over rising tuition and shed some light on institutional assertions that they have realized sizable productivity gains to keep total costs relatively stable. Virginia's per capita support for postsecondary education was also examined by SHEEO. Using the U.S. as an index of 1.00, Virginia's per capita support for higher education was indexed at 0.85 in 2011 and 0.78 in 2012. The state allocates 5.8 percent of state tax returns and lottery profit to higher education; the national average is 6.8 percent. In other words, other states are investing more in higher education than Virginia.
- 6) **State Policy.** In Virginia, public institutions of higher education are granted a great deal of autonomy in accomplishing their institutional missions. Recent legislation, including the Restructuring Act of 2005 and the Top Jobs Act of 2011, has reaffirmed institutions' authority over setting tuition and fees and over financial aid policy. The Restructuring Act, in particular, granted institutions varying levels of freedom from state administrative procedures and regulations. In return, the General Assembly put a performance funding system into place, but the efficacy of this system has largely been stymied by funding reductions stemming from the recession of 2007 and subsequent slow recovery.

In a state with a new governor every four years, a growing political divide between its populous urban centers and rural areas and no clear end to its budgetary limitations on the horizon, higher education in Virginia faces continued uncertainty about the state's willingness and ability to provide greater state support in the coming years. This uncertainty creates an opportunity for SCHEV to help make the argument on behalf of all postsecondary education stakeholders for continued investment in higher education by establishing clear goals and metrics for success, coordinating the institutions' efforts in attaining those goals and spreading the word about the dividends that postsecondary education returns to its students and to the Commonwealth.

Gathering information from the public

The importance of both quantitative and qualitative data was recognized in the process of developing the statewide strategic plan. This data collection included efforts to gather input from constituent groups identified by SCHEV. The design for gathering input was as follows:

- On-site visits were scheduled for up to two days in six regions across the Commonwealth.¹
- Once dates and locations for the site visits had been identified, SCHEV identified key constituents and constituent groups in the region, often with direct input from the host institutions. In every case, the host institutions were generous with their time and resources; they are specifically listed in Appendix 4: List of Hosts for On-Site Regional Visits.
- Invited participants were provided with limited background information, so they would feel comfortable with the topic but not be biased in their responses. Appendix 3: Handout with Key Interview and Focus Group Questions is the handout that was provided to each participant in advance and in the room as an introduction.
- In most cases, one and a half days were spent in each region, with the visits consisting of a mix of individual and group interviews, as well as phone interviews with constituents who could not attend in person. When constituents were not available on the site visit days, additional interviews were also scheduled on follow-up days when possible, and many constituents who were unable to attend were also given the option of completing an online version of the interview.
- The individual and group interviews were structured by using pre-determined questions to guide the flow of the conversation; however, the format also allowed for considerable discussion and back-and-forth dialogue to capture constituents' input. The background handout included the Futuring Framework questions that guided our discussions.
- A wide variety of constituents, including high school students, high school principals and administrators, college students, higher education leaders (presidents, student affairs officers and other administrators), business leaders, community service leaders and state agency and legislative representatives volunteered their time to give input into this process.²

Value of the regional visits and focus groups

The regional visits and focus groups contributed to the strategic planning process in the following ways:

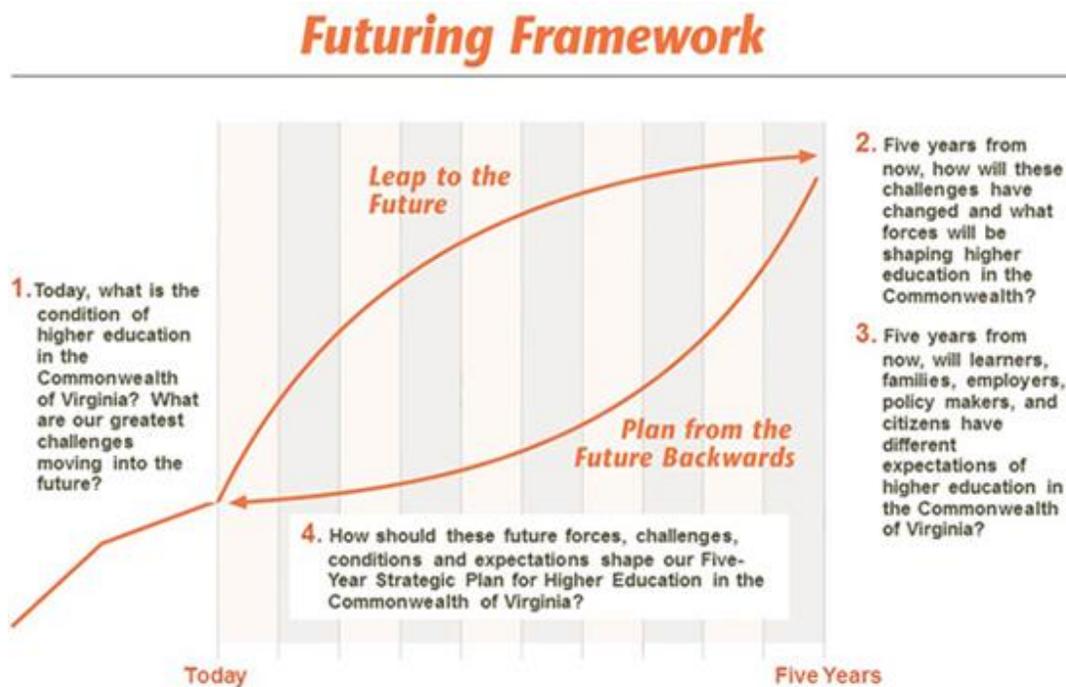
- They provided a qualitative understanding of the differences between the regions of the Commonwealth to complement the quantitative comparison.
- The visits assembled and engaged a wide range of stakeholders in individual conversations, group discussions and formal focus groups.

¹ *The regional designations were based on the eight regions defined by Virginia Performs, <http://vaperforms.virginia.gov/Regions/regionsMap.php>.*

² As of August 20, 2014, 130 individuals participated in either an in-person interview, a focus group, or a telephone interview.

- The conversations probed issues in depth and revealed “big ideas” for higher education and the strategic plan. See Appendix 5: Ideas and Challenges Identified through Interviews and Focus Groups.
- The regional meetings, focus groups and interviews allowed the participants to engage in the Futuring Framework to Plan from the Future Backward by responding to the four questions shown below.

Figure 3: Illustration of the Futuring Framework



What follows is a sampling of comments and perspectives that emerged from the interviews and focus groups arranged by common and recurring themes. It is a sampling of what people actually said about conditions, challenges and concerns pertaining to higher education. Again, each of the points below represents something that an individual or group said was a concern or challenge from their perspective. No attempt has been made in this document to validate or fact-check these statements because the goal is to better understand the perspectives held by these constituents, which is valuable in the planning process and later in communicating about the plan to a diverse audience.

Table 1: Varied perspectives on the common themes

Affordability and cost
Cost often influences where a student decides to go to school
Because of the cost of college, people are not able to buy the other things in life (houses, etc.)
Underemployment and debt
Some schools are better at raising money than others
It is possible to have incentive programs with the state for funding
Administrative costs at the institutional level are too high
Administration of students loans is too complex for parents/students (not that they aren't affordable, but they're confusing)
Challenging to get across the full scope of expenses/cost (books, tuition, and housing, etc.)
Graduated tuition plan
Access
Students in the middle have programs to help them, including Access, Upward Bound, and AVID
Changing demographics: how will we help more 1st generation students?
Demographics refer to more than race, they refer to different backgrounds, returners, veterans, first generation students, etc.
Veterans should be able to get credit for service/classes
These different demographic groups of people will also need more assistance to go to school
Challenge of building a community with the changing demographics
There are too many out-of-state students and in-state students can't get into the schools, especially from Northern Virginia
College is not for everyone, and perhaps we're putting too much pressure on individuals to go
In rural areas, lack of WIFI/Internet/Fiber is a major barrier to online learning, etc.
Some 4-year institutions don't take all community college transfer credits, which leads to higher cost for student
Financial aid should go to Dreamers
Preparedness/remediation
The benefits of a gap year
Transfer students tend to do better
Test prep is an issue; cost of test prep is leaving some at a disadvantage
Student success programs in the colleges are too costly
Who should be responsible for remediation: community college or high schools?
Coordinate higher education with K-12
Possible online remediation for the academics
If growth in budgets are in remediation; is that where we should be growing?
Higher education in general
Like that schools have autonomy
Concern about tracking higher education as an ROI and comparing major with salary after graduation
Books need to be more open
Satellite campus possibility
Uneven declining enrollment
Is the Sentara hospital model (internal training/certification of nurses) feasible?
Do we let institutions award credentials that do not meet employer requirements?
Productivity of the institution tied to state funds
HBCUs need to have their place in the system defined
Pooling services together

Do we need all of these institutions?
Duplication with programs is a concern
Mandatory summer school to avoid building more buildings
Liberal arts are important but not for everyone
There is no traditional route or path anymore—how can we let people know any options are okay?
Institutions want more data on courses, transfers, graduations—from community college through a 4-year
Each college should pick what they are good at and focus on those programs (i.e. small liberal arts institution doesn't need a full blown research center)
Liberal arts colleges do not need to be research institutions
Are we teaching in a way that is meaningful (using technology, etc.) that is appropriate for this generation?

STEM programs

Too much focus on STEM
Concern that universities increased STEM programs to increase funding for their schools
This also lead to issues of duplication
These disciplines do not necessarily produce people with thinking, writing and creative skills
If you major in STEM, it is easier to get financial aid
Higher education cannot force STEM on students

Electronic Data Collection Instruments, Public and Private

The public data collection instrument

As was mentioned earlier, as part of the effort to gather input from constituents, two online instruments were deployed, one of which was a public data collection instrument that was posted on the SCHEV website and advertised by SCHEV using a press release and social media. Over 500 respondents provided input through the public data collection instrument, 499 from within Virginia. The summary findings from that report are incorporated below for ease of reference:

- The preliminary assessment of the results exposes the difficulty of finding the right balance for higher education in Virginia. On one hand, respondents are proud of higher education in the Commonwealth and believe it is of high quality. That quality, they feel, needs to be protected as a cornerstone value to the state.
- At the same time, there is deep concern about affordability. It is evident that keeping college affordable is an important consideration, but this belief is balanced by the ambivalence among participants about raising taxes to allow more students to afford college.
- Based on the indications contained in these responses, Virginia's colleges and universities need to show that they are making efforts to improve operations and save money, not just asking for increased support from the government. Finding ways to define excellence and quality in higher education in some way other than prestige or rankings would help substantiate the need for funding.
- A strong message in the responses is the belief that higher education should contribute to preparing students broadly for employment. Respondents believe that colleges and universities are doing this now and identify it as an important mission. This impetus suggests that Virginians

value more than just narrow occupational skills. They also attach great importance to broader skills that will prepare students for a successful lifetime. (Source: Results from Public Data Collection - Draft report, August 8, 2014)

The private data collection instrument

In the event that scheduling did not permit our team to interview target constituents in person, they were provided with a link that they could use to complete a private data collection instrument that was designed to mirror the in-person interviews, if they desired. The link to the private data collection instrument was also provided to several of the advisory committees that advise SCHEV in its policy work and program administration. The instrument was open from July 9 through August 28, 2014, during which time 51 individuals participated in the private data collection instrument online, 89 percent of whom were state government employees (including employees of public institutions). Responses were received from all eight of the regions in the state, with the most (at 30 percent) from the Central Region, which includes Charlottesville and Richmond. As would be expected, these respondents were highly educated—46 percent held a doctoral degree, 36 percent a master's, eight percent a professional (JD or MD), six percent a bachelor's, two percent an associate's, and two percent a certificate. The instrument was divided into the following sections:

1. **Demographics** – Limited demographic data were collected, as reported above, but no personally identifying information was collected.
2. **Perspective** – Information was collected to help frame the respondents' perspective, such as how involved they were in various policy areas or what industry in which they work.
3. **Challenges and positive changes in their industries** – The large majority of respondents are in the higher education industry.
4. **Futuring** – Respondents were asked what they felt were future challenges in their field, whether they felt that higher education can address them and how.
5. **Preserve and avoid** – Respondents were asked what qualities and characteristics of higher education that Virginia should preserve into the future and, conversely, which it should avoid.
6. **Urgency** – Employees of higher education institutions were asked what challenges should be addressed most urgently in their institutions.
7. **What else?** – Respondents were given the opportunity to add additional ideas, input or feedback.

Selected direct quotes from the private data collection instrument are provided in Appendix 6: Quotes from the Private Data Collection Instrument. Because the majority of respondents were employees of higher education institutions, the responses to “How urgently should your institution address the following challenges” are listed below. Respondents were given multiple choice options and the ability to fill in their own responses, though none did. The table below is sorted by the level of urgency indicated by the respondents. The challenge identified as most urgent was “being resilient in the face of change.” We note that the third is “increasing faculty and staff pay and benefits,” which prompts the question of what positions respondents held in their institutions: 6 percent were faculty members, 39 percent administrators and 65 percent executives. Also of interest in this table are the four challenges that **everyone** agreed challenged their institution on some level: **being resilient in the face of change,**

increasing faculty and staff pay and benefits, improving the financial stability of the institution and expanding delivery methods beyond classroom learning.

Table 2: Responses to what is urgent at their institution, from higher education employees

Answer Options	Extremely urgent	Somewhat urgent	Not at all urgent	Not a challenge at my institution
Being resilient in the face of change	70%	21%	9%	0%
Ensuring affordability for all	68%	24%	6%	3%
Increasing faculty and staff pay and benefits	65%	32%	3%	0%
Preparing graduates for employment	62%	26%	3%	9%
Improving completion rates	56%	18%	9%	18%
Ensuring accessibility to a diverse student body	53%	21%	18%	9%
Identifying new, innovative programs	50%	34%	13%	3%
Improving financial stability of institution	50%	29%	21%	0%
Improving efficiency in internal operations	44%	44%	9%	3%
Preparing graduates for citizenship	44%	24%	18%	15%
Deepening relationships between faculty, staff and students	33%	21%	30%	15%
Addressing aging facilities	32%	53%	9%	6%
Enhancing research programs and products	32%	35%	26%	6%
Expanding delivery methods beyond classroom learning	29%	53%	18%	0%
Teaching entrepreneurship	27%	45%	21%	6%
Providing quality athletic programs	0%	32%	59%	9%

Identification of themes and success factors

Once all of the information had been gathered from all of the sources discussed above, the next step was to synthesize the results from the other state and institutional plans, the quantitative analysis and the qualitative data gathered through interviews and focus groups. During that synthesis, five key themes were identified along with elements of potential initiatives and actions under each theme, which are presented as success factors necessary to achieve the themes. Further analysis and synthesis then refine these themes and incorporated them into the goals, objectives and initiatives for the strategic plan.

Figure 4: Five Themes and their Success Factors



Additionally, effort was made to find extrapolated trends in the data—in other words, using the Futuring Framework, what is happening today was extrapolated out five years into the future. Below are some examples of that extrapolation:

- Today, tuition and fees are poised to increase five to seven percent per year.
Five years into the future, that would mean a compounded increase of 25-35 percent.
- Today, the pipeline of out-of-state students from the Northeast/ Mid-Atlantic states is important to some Virginia institutions.
Five years into the future, decreasing numbers of college-ready students in those areas who are able to pay out-of-state tuitions may affect the pipeline in Virginia.
- Today, the availability of publicly-funded research dollars is tightening.
Five years in the future, competition for research funding will increase and institutions will turn to alternative sources of research and development funding.

Culminating in Sensemaking

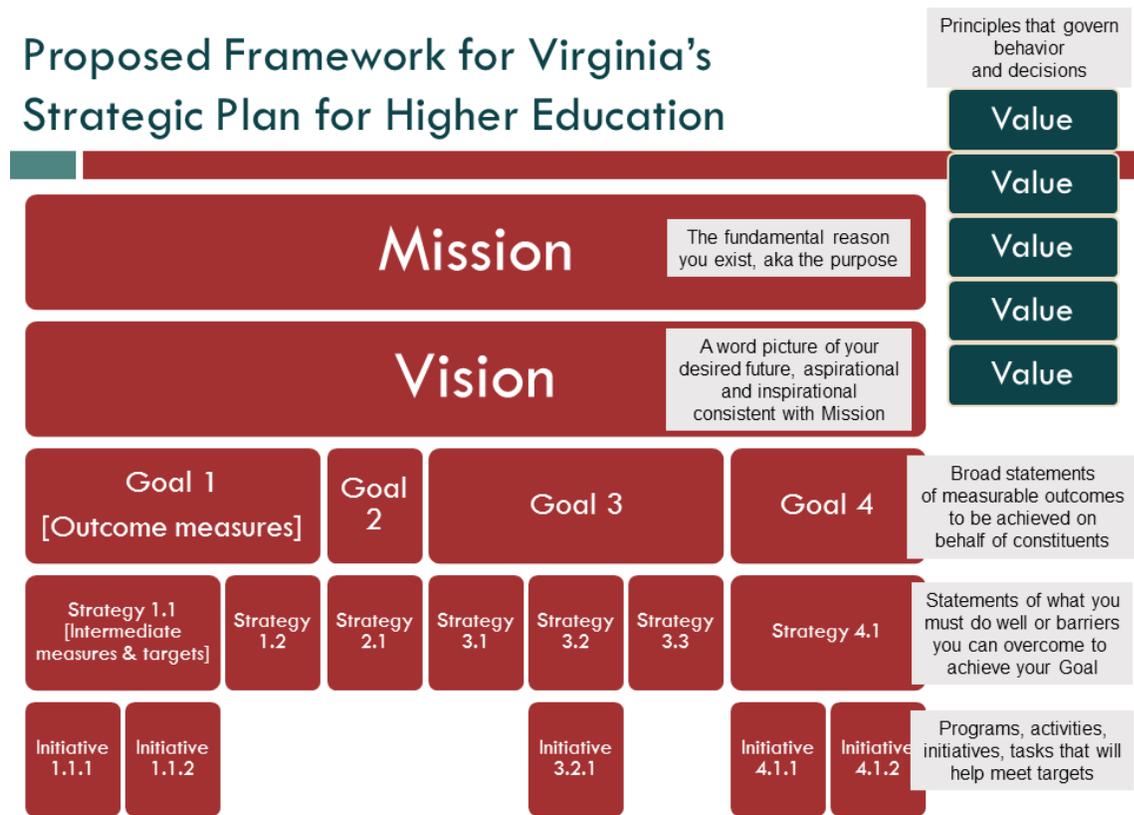
The next step in the strategic planning process was to convene a Sensemaking meeting during which the Staff and the Council reviewed the findings and analysis described above and engaged in a facilitated dialogue to distill key takeaways and potential strategic goals. A summary was presented of all of the inputs, including: interviews with SCHEV Staff, Council members and institution presidents; the Data Memo, Gap Analysis Memo, Policy Scan Memo; interviews and synthesis from regional visits and surveys; expert insights on higher education over the next five years; strategic plans from other states; insights on successful strategic plans from Virginia institutions; and background readings. Preliminary results, as described above, were also presented, including: the identification of critical issues, themes and success factors; the barriers and differences in public opinion; insights into what has worked in other states; and a proposed framework for the future statewide strategic plan. During the first day of the Sensemaking meeting, this information was presented to the Council Staff who then provided comments and feedback during a facilitated discussion period. On the second day, the information was presented in condensed form to the full Council, whose members offered comments and discussed the findings, ultimately leading to discussion by the Council of the draft Mission, Vision and Values that had been distilled from all of the inputs.

In the next section, the proposed framework for the statewide strategic plan is described.

The strategic plan framework

At the Sensemaking sessions with SCHEV, a framework for strategic planning was introduced. This framework includes the following components: Values, Mission, Vision, Goals, Strategies and Objectives. Figure 5 shows the definitions of each of these components; these definitions guided the creation of the components and inform the explanation of the recommendations. This framework, as well as all of the background information and accompanying examples provided in this report, can be used to help build consensus around the plan.

Figure 5: Proposed Framework for Virginia's Strategic Plan for Higher Education



At the Sensemaking meeting, the SCHEV Staff was engaged to draft Mission and Vision statements for higher education in Virginia and to brainstorm ideas for Values. The results of those efforts were then presented to the Council on the following day. The Goals, Strategies and notional Initiatives presented below were then created based on the Council's feedback.³ At the time of this writing, feedback continues to be gathered from the Council members, SCHEV Staff and other key stakeholders.

³ The Goals and Strategies presented here are consistent with what was presented to the Executive Committee of Council on August 22, 2014.

Using this framework to build consensus

SCHEV, as the primary champion of this statewide plan, can use this framework to build consensus around the plan and around all of the components of the plan. Although the components and language have not yet been finalized, following are examples of methods and messaging for building consensus:

- The **Vision** (the word-picture of the desired future, the aspirational and inspirational statement) presents an opportunity for inspirational messages. It can help explain the investment; it can help build urgency; and it can help different individuals connect in different ways. It is the inspirational statement that explains what all the pieces of the puzzle are working toward, and in the case of a statewide plan for postsecondary education, it should creatively connect all constituents and their unique worldviews: policymakers, institutions, faculty, taxpayers, families, students, business leaders, community members and beyond to the future of postsecondary education.

A Vision statement should not be impossible, but it should take a good deal of effort to achieve. It should be a stretch. At one time, the Ringling Bros. and Barnum & Bailey Circus's Vision was "to be the greatest show on earth;" NASA's Vision was "to put a man on the moon;" Paul Allen and Bill Gates had a Vision "to put a computer on every desk at work and in every home."

A number of Vision statements have been introduced for Virginia's plan. What SCHEV should consider when choosing a Vision is this question: how can we use this statement to motivate any- and every-one to care about what we are trying to achieve through postsecondary education and to support it? Options considered for the Vision statement included:

Higher education will transform the lives of Virginians, our communities and our Commonwealth

Every Virginian will have an education beyond high school

Virginia will have educational achievement, research, and public service—second to none

- The **Mission** (the fundamental reason for existence, the purpose) presents an opportunity to build consensus by describing succinctly what higher education is doing and for whom. If someone asks the questions "Why do we need to have so many colleges and universities in this state?" or "Why would we need to invest tax dollars beyond high school?" the Mission can answer those questions. Consider the draft Mission statement presented to Council on August 22, 2014:

The MISSION of Virginia's higher education is to advance learning, research and public service that enhance the prosperity of the Commonwealth and the well-being of all its people.

What does this Mission tell us about the purpose of higher education, what it is doing and for whom? First, the Mission statement tells us that higher education is advancing three things: **learning, research** and **public service**. Then, the Mission statement tells us that higher education is advancing those things for the **Commonwealth** as a whole and for **each and every individual** in the Commonwealth. This particular Mission statement goes one step further; it describes the outcomes that higher education enhances for the Commonwealth and its people: for the Commonwealth, **prosperity**; for each of its people, **well-being**. In conversation, the prosperity of the Commonwealth might be taken to include robust economic development, an increased tax base, thriving communities, a healthy citizenry and more. In conversation, the well-being of the people might include better quality of life, higher incomes, increased civic participation, improved health outcomes, higher self-reliance and more.

- **Values** (which describe the principles that govern behavior and decisions) also present an opportunity for building consensus. Values—while not necessarily distinctive—are important characteristics or qualities that are universal. During Sensemaking, a short brainstorming session resulted in an extensive list of suggestions for the principles that govern behavior and decisions in higher education: options, choice, access, affordability, diversity, holistic education, liberal arts, value, customer-service, responsiveness, commitment, effectiveness, excellence, collaboration, leadership, adaptability, flexibility, trust, credibility, entrepreneurialism, disruption, stewardship of resources, accountability, shared responsibility and efficiency. Some ways to narrow this list of Values (if it is determined that the statewide plan should include an explicit list of values), is to ask (i) what terms have not appeared in the Mission or Vision (or Goals) that we think are critical?, or (ii) which concepts have not been a priority in Virginia but should be made a priority now?

When asking those questions, three concepts for the Values rise to the top: efficiency, disruption and customer-service, none of which are specifically stated in the Mission or Vision statements. Including **efficiency** as a value will likely resonate with the Council and others who expect the statewide plan to lead to reduced cost and increased efficiencies statewide. The concept of **disruption** (and higher education's ability to excel in the face of it) is a concern of at least some institutional leaders (recall that the most urgent challenge for institutions in the private data collection instrument was being **resilient** in the face of change). A **customer-service** oriented Value will speak to families and students as well as high-school guidance counselors and college advisors, among others. Based on feedback from Council and other key stakeholders, another possible Value might be **inclusiveness**, since the statewide plan is relevant to all postsecondary education (not just the public four-year institutions) and should benefit all people in the Commonwealth.

Going through the exercise above not only will allow SCHEV to identify Values, but it also will allow SCHEV to identify a target audience and target messages for its constituents. For example, at least in the early stages, when building consensus with institutional leaders, Staff can focus on **resilience** and customer service; when building consensus with Council and policymakers, Staff

can focus on **efficiency**; when building consensus with private institutions, **inclusiveness** and so on.

- The inter-connected Goals, Strategies and Initiatives present yet another opportunity for building consensus. The current proposed Goals and Strategies (with notional Initiatives) are presented in more detail in the next section of this report, but here, how the framework can help SCHEV build consensus is the focus. First, the Goals, as drafted, are designed to support the Mission (each Goal can be tied to a particular component of the Mission), to be stable (to last for at least six years, likely longer) and to be positive (to build consensus, Goals should be positive and should be able to be supported by all—if even one Goal causes a constituent to leave the table, the plan will lose its credibility). Also, the Goals are directly tied to the identified success factors of the Five Themes from the input gathering process and to priorities expressed Council members.

Once the high-level, stable, positive Goals are clarified, the next step is to identify Strategies that will contribute to achieving that Goal. Recall that, ***“Strategy is focused, consistent behavior over time, adapting in response to emerging conditions.”*** To develop Strategies, each goal was evaluated using the question, “What do we need to master (with focused, consistent behavior) in order to achieve this Goal?” The answers to that question for each Goal produce the associated Strategies. To provide a simple example of how this process works, consider an airline that has a goal to be “#1 ranked in customer service.” When the airline asks the question, “what do we need to do very well to make this happen?,” the answers they came up with were: (i) get people to where they are going on-time, (ii) get their luggage there at the same time, and (iii) be responsive to complaints. Those three answers became Strategies. Then, the airline identified strategic Initiatives to accomplish those Strategies. For example, the airline launched a 24/7 customer service hotline under Strategy iii. One of the benefits to this framework is that now, the staff working the night-shift at the customer service hotline know exactly why they’re there—they are helping the airline achieve its goal to be #1 ranked in customer service—and they can own that goal on a personal level.

Prior to introducing the Goals and Strategies with the notional Initiatives, an important factor should be mentioned that makes this statewide strategic plan unique, and more challenging to implement. Specifically the high level of independence that Virginia’s institutions of higher education currently enjoy, characterized by separate and independent Boards of Visitors. No single organization, group or leader owns this plan and can lead, or be held accountable, for its full implementation, which makes successful implementation of the plan exceptionally challenging. This is in contrast to the strategic plan for a college or university, where the Board of Visitors and President are ultimately responsible and accountable and the President can direct and mobilize her leadership team to execute the strategies and implement the actions, operational plans and budgets. The implementation of this strategic plan requires a different approach. In its role as a coordinating board, SCHEV must build consensus throughout the higher education community and among its many state stakeholders.

SCHEV can achieve this in several ways:

- By demonstrating the tremendous positive benefit that can be realized through the successful attainment of the Goals outlined in the plan;
- By demonstrating that collective, regional and statewide actions are required for success; and
- By showing that success will require a rekindling and reaffirming of public support for the Goals that will require collectively mobilizing leadership.

To perform these activities, SCHEV will need the support of the Governor and General Assembly so that it can focus on outreach, communication, data creation and production, and thought leadership to build consensus around this plan. However, SCHEV must also reach out to the individual institutions to establish itself as a valuable resource and ally in attaining institutional goals that are aligned with the statewide strategic plan. It must also reach out to the public to continually remind them that postsecondary education is a worthwhile and productive public investment.

Draft goals and strategies for higher education in Virginia

Virginia provides postsecondary education through a network of autonomous public, private non-profit and proprietary institutions that serve the citizens of the Commonwealth. Taken together, these institutions provide a full range of postsecondary certificates and degrees in a wide array of fields. Many also provide research and public service that are increasingly important for prosperity in the 21st Century economy. This strategic plan for Virginia postsecondary education considers all of these institutions, along with critical partners such as PK-12 education and the business community.

The Governor, General Assembly, boards of visitors and SCHEV each have unique responsibilities to coordinate, guide and motivate postsecondary institutions in the state. The aim is to influence these institutions to pursue the mission, vision, goals and strategies that are important to the state and expressed in the strategic plan while maintaining the independence and distinctiveness that characterize Virginia's institutions. To that end, these goals and strategies have been crafted to achieve broad, bipartisan appeal and be pursued with consistency across administrations.

The following five goals are proposed for Virginia postsecondary education with cascading sets of strategies for each goal. The five goals are:

- Goal 1.0—Provide Affordable Access for All
- Goal 2.0—Optimize Student Success
- Goal 3.0—Achieve Sustainable Excellence
- Goal 4.0—Advance the Economic Prosperity of the Commonwealth
- Goal 5.0—Frame a Compelling Narrative for Virginia Postsecondary Education

The following sections describe each Goal and its supporting Strategies and reference potential Initiatives and metrics associated with each. (See also Appendix 7: Sample of How Initiatives Align with Strategies and Goals within the Framework.)

Goal 1.0—Provide Affordable Access for All

Affordable access is the most compelling issue for the students, parents, high school counselors and teachers and college administrators who participated in the regional visits – both today and moving forward into the future. Affordable access also concerns employers and policy makers. They all conveyed a clear understanding that long term-sustainability of postsecondary education cannot be achieved without making postsecondary education more affordable, productive and responsive to the changing needs of the 21st Century economy.

The selective public universities in the state have critical role to play in achieving this goal by increasing their enrollment of Pell Grant recipients. If they do not, Virginia runs the risk of evolving into a stratified public system where the wealthy attend the most selective institutions and the poor attend less selective universities and colleges. To avoid this, the selective universities must strive to find and develop talented students across the economic, racial and ethnic spectrum of the state.

Most other states are experiencing these same challenges, to large degree. While many other states have taken useful approaches to address these challenges in the short term, none have produced a

robust, comprehensive solution to affordable access, optimizing student success and achieving sustainable excellence moving into the future. Virginia is charting a new course in this regard.

Achieving affordable access over the next 5-10 years is not simply a matter of keeping tuition low for all students. Rather, it involves balancing a number of intersecting actions and public policies:

- Expanding outreach programs in K-12 and building a culture of learning among potential postsecondary learners;
- Dealing with the changing demographic composition of the pool of potential postsecondary learners;
- Cultivating accessible pathways/bridge programs and seamless articulation/transfer policies;
- Achieving affordable net prices and substantially expanded pools of needs-based financial aid;
- Providing institutions with adequate revenue, including a dependable combination of state appropriations and differentiated tuition income; and
- Accelerating student completion of certificate/degree objectives while managing the total cost of completion.

The following strategies are crafted to address this goal. Most of these strategies will need to be adapted to accommodate the variations that define the different regions of Virginia. They can build on existing pilot programs that can be adopted regionally and grown to scale to meet each region's needs.

Strategy 1.1. Expand early outreach programs and build the culture of learning

Across the country and in parts of Virginia, community colleges and universities are actively partnering with pre-K-12 education to engage students and prepare them for college success, STEM-H careers and other elements of postsecondary education. Part of the outreach should include raising the learning expectations of these populations and enhancing a culture of learning. Expanding 529 savings programs and awareness of them, increasing high school advising for students and parents about the net price of education and other similar support programs are all needed to increase college readiness and reduce the costs of remediation.

This strategy is especially important given the changing demographic composition of the pool of Virginia postsecondary learners. For example, research has shown that Hispanic learners, a vital and growing part of Virginia, may not come from a culture in which higher education is considered normal and expected outcome. These important students are reached by pathway programs in Northern Virginia that can be models for other regions.

Virginia should actively support such pre-K-16 education efforts at the local and regional levels, such as those flourishing in Northern Virginia. Examples of possible initiatives could include:

Initiative 1.1.1. Expand early K-12 outreach and mentoring programs.

Initiative 1.1.2. Raise learning expectations/skills of growing Hispanic population and others.

Initiative 1.1.3. Expand 529 programs to reach broader population.

Strategy 1.2. Cultivate accessible pathways and seamless articulation/transfer

Across the Commonwealth, community colleges and K-12 schools are engaged in dual enrollment and in bridging/pathways programs. In addition, articulation and transfer arrangements facilitate students receiving college credit for college-level courses taken while in high school and optimal transfer credit when students transfer from community colleges to universities. Colleges and universities across Virginia should emulate and expand the model pathways/bridging programs and partnerships between George Mason University, Northern Virginia Community College and Northern Virginia school districts and NOVA's transfer and articulation programs.

Examples of potential initiatives could include:

Initiative 1.2.1. Expand and scale existing pathway/bridge programs, regionally.

Strategy 1.3. Achieve affordable net price and differentiated tuition

The end goal for an affordable net price policy is to assure that each student has a net price that is appropriate to his/her ability to pay. One sensible target could be that a Virginia student with a median family income should graduate with a bachelor's degree free from loan debt.

Other states (New York, Colorado, Iowa) have made progress in holding down tuitions by combining predictable annual increases in state appropriations with limits on tuition increases. Virginia's efforts to motivate institutions to limit tuition increases have been curtailed by reductions in state funding through the course of the most recent recession. Because this an endemic problem in higher education, it is important to find a solution that can be pursued consistently and sustainably into the future. Virginia public universities should be able to guarantee that four years of tuition will not exceed CPI inflation over the coming four years for every high school senior in the state.

Virginia already allows public institutions to set their own tuition strategies. This approach involves allowing high-demand institutions to raise their tuition to market levels but also calls for greater investment in needs-based aid. One result is that the more selective, higher-tuition institutions have more money than institutions with less market demand to fund institutional financial aid for low-income and middle-income students. Institutions have strong incentives to increase and maintain enrollment, which may not align with the state interest in assuring that high tuition and inadequate student aid does not preclude qualified students from attending a public college or university of their choice in the state.

Without foresight and strategic direction, a differentiated tuition system and a student aid award process under the control of institutions could result in increasing gaps in financial vitality and viability among public institutions. It could also run counter to the imperative to increase diversity and inclusiveness of enrollment on some campuses, denying realistic chances for enrollment to a number of low- and middle-income students. If the higher education needs of the growing population of Hispanics/Latinos are not met, Virginia will lose an important opportunity to prepare its fastest growing demographic for the jobs of the 21st Century.

State policy makers would be able to improve affordability for the students at every public college and university if some of the total student aid was awarded directly by the state, to account for the differences in institutional resources. SCHEV has a strong policy role to play in coordinating this strategy throughout the Virginia higher education network.

Examples of potential initiatives could include:

Initiative 1.3.1. Institutions let tuition reach market levels (tuition levels vary by institution) and substantially raise needs-based aid. To succeed, institutions with more needy students will need enhanced aid.

Initiative 1.3.2. Dramatically increase levels of needs-based aid from institutions, state and philanthropic sources. (Build new philanthropic opportunities to sustain needs-based aid for at-risk student. Such funds could also be used to support mentoring and student success programs.)

Strategy 1.4. Accelerate completion and manage the total cost of completion

In addition to managing the impact of annual net price increases, serious efforts should be made to manage the total cost of completion of students' certificate and degree objectives. This can involve a combination of:

- Improved counseling, advisement and true cost of college information;
- Institutions sign a contract with students that guarantees the price for four years;
- Encouraging dual enrollment, advanced placement credit for prior learning, and other mechanisms for enabling students to complete the objectives ahead of schedule;
- Incentivize institutions to reduce superfluous credit hours (many students acquire more credit hours than are needed for graduation); and
- Improve degree planning and course availability to enable on-time completion.

Examples of potential initiatives could include:

Initiative 1.4.1. Improve counseling and financial awareness for learners/families so they can manage their cost of completion (build on existing efforts).

Initiative 1.4.2. Leverage dual enrollment, advanced placement credit for prior learning.

Initiative 1.4.3. Encourage institutions to reduce “superfluous SCH,” the need for fifth year to graduate and other impediments to on-time completion. Share best practices.

Initiative 1.4.4. Encourage institutions to guarantee tuition and fee for the next four years for each entering class.

Goal 2.0—Optimize Student Success

In the past decade, institutions across the nation have made substantial progress in understanding the conditions influencing student success and improving outcomes for all students, especially those at-risk because of inadequate high school preparation, adults returning to college after a long absence from education and students with inadequate income. Leading institutions in the student success movement (such as Colorado State University) have combined multiple actions that are enabling them to optimize student success – setting and achieving stretch goals for degree completion, providing competent advising, providing academic support, accelerating completion, addressing the cultural needs of minority students and providing adequate financial aid. Many Virginia institutions are participating in various programs and initiatives to improve student success that can be the foundation for even more ambitious strategies moving forward into our future.

Unaffordability and indebtedness are also major impediments to student completion. Achieving Goal 1.0 Providing Affordable Access for All would help ameliorate those impediments. In addition, Virginia should assemble a portfolio of actions including:

- Improving readiness for postsecondary study through aggressive K-12 partnerships;
- Dramatically reducing the level of remediation required and improving success of developmental education students;
- Expanding and building on dual enrollment programs - grow to scale;
- Improving the availability of needs-based financial aid so more students can enroll full-time;
- Improving student completion rates of certificates and degrees through a mixed portfolio of institutional policies, processes and practices; and
- Enhancing degree completion and lifelong learning for adults.

SCHEV can play a central role in improving readiness and reducing the need for remediation. While most of the portfolio of student success actions is institution-focused, SCHEV can play an informational, policy-making and incentivizing role in advancing the strategies associated with this goal. SCHEV could further expand its data to include high school information and pre-enrollment predictors of college success. It could also build on its current data on the complexities of transfer activities and aggressively promote its insights on how to optimize college success.

Strategy 2.1. Improve readiness; reduce need for remediation

Improving readiness for college is one of the greatest productivity-boosting alternatives available, and PK-12 initiatives exist in most of the 50 states. There are significant ongoing efforts in Northern Virginia, Tidewater and Richmond that rely on regional collaborations and/or linking to national networks. These efforts should be expanded and taken to scale, region by region. SCHEV can play a major role in facilitating these efforts and serving as a clearinghouse/matchmaker to expand these efforts in Virginia, tailored to the distinctive needs of each region.

Possible initiatives could include:

- Initiative 2.1.1.** Community colleges/universities work with K-12 to reduce remediation, align curriculum, place college counselors in high schools and build on existing success stories.
- Initiative 2.1.2.** Provide students and parents with self-administered exercises/tests to measure readiness for college-level work.
- Initiative 2.1.3.** Refine placement into remediation courses, identify missing competencies and improve success rates in remedial courses through self-paced programs.
- Initiative 2.1.4.** SCHEV serves as clearinghouse and matchmaker to link regional partners and national networks dealing with readiness, mentoring and success programs.
- Initiative 2.1.5.** Expand and build on dual enrollment, advanced placement, bridge and pathway and STEM-H pathway programs.

Strategy 2.2. Produce graduates who are prepared to live productive, meaningful lives

The vision for Virginia Higher education is that it transforms the lives of Virginians, our communities and the Commonwealth. The concept of student success is multi-faceted. This strategic plan is committed to producing graduates who:

- Demonstrate strong critical thinking and problem solving skills;
- Are prepared to be active citizens;
- Are employable and possess good work habits; and
- Have acquired the capacity and motivation for perpetual learning.

Such outcomes are expected of our institutions and are critical to our concept of excellence. They are embedded in the initiatives under Goals 1.0 – 3.0.

Strategy 2.3. Improve certificate and degree completions and achieve targets for certificate/degree production

Institutions should be encouraged to set stretch goals for improving certificate and degree completion rates and for increasing certificate/degree production to meet and exceed the Commonwealth's growth goals expressed in TJ21 and the Governor's "New Virginia Economy Workforce Initiative."

Improving overall and on-time degree completion rates are two of the opportunities with the greatest potential for productivity enhancement available to Virginia postsecondary education. Institutions should set stretch goals for improving certificate and degree completion by deploying a tailored set of activities such as those mentioned below:

- Managing the admissions pipeline and policies for dealing with at-risk students;
- Improving the first-year experience – eliminate bottlenecks and impediments;
- Utilizing dynamic, predictive analytics and interventions to address at-risk behavior;
- Deploying individual planning and advisement systems to manage learner progress and success;
- Utilizing co-curricular activities to increase student engagement; and
- Leveraging Big Data-based analytics to understand the factors of student success.

Possible initiatives to achieve this strategy could include

Initiative 2.3.1. Build a Virginia clearinghouse for best practices in optimizing student success and mobilize potential partners in improving readiness and providing mentoring.

Initiative 2.3.2. Mobilize regional partners to take collective action for student success (e.g., Access in Tidewater, which provides mentoring in high school and college for selected students).

Initiative 2.3.3. Utilize operation planning to encourage student success initiatives at each public institution.

Initiative 2.3.4. Work with local employers to align curricula with workforce needs, including certificates – certificates will account for a large share of the growth in demand for postsecondary skills during the time frame of this strategic plan. VCCS aims to triple the number of certificates and degrees over this time frame.

Initiative 2.3.5. Utilize Big Data analysis to understand success factors for students in Virginia institutions (especially transfer). See the example of the Predictive Analytics Research (PAR) project headed by the Western Interstate Commission for Higher education (WICHE).

Strategy 2.4. Enhance degree completion and lifelong learning for adults

One of the great strengths of American higher education is the ability of learners to stop out and get back on track to complete certificates and degrees as adults, usually while employed. Across the nation, institutions and states are targeting students who have stopped out, but are close to completion (e.g. within 30 credits of their baccalaureate) to engage in tailored degree completion programs. Some Virginia institutions are already targeting such students. Taking these efforts to greater scale promises to enable the Commonwealth to achieve and exceed existing goals for degree completion.

In addition, the growing need for lifelong, perpetual learning presents growth opportunities for Virginia institutions. Some Virginia institutions are currently active in this area, but significant potential for growth exists, especially as linked with emerging workforce needs. Suggestions for initiatives include:

Initiative 2.4.1. Expand the number of degree completion programs available regionally and online. Leverage these programs to bring students to degree completion in order to achieve the Commonwealth's degree completion goals.

Initiative 2.4.2. Encourage the expansion of lifelong learning offerings, including a strong mix of online offerings linked to emerging workforce needs.

Goal 3.0—Achieve Sustainable Excellence

Goals 1.0 and 2.0 address the need to invest in achieving affordable access and student success, which is multifaceted and aligned with the needs of the Commonwealth. Goal 3.0 addresses the need to invest in and maintain excellence in people, programs, activities, technologies and facilities in ways that will be sustainable in the face of the disruptions of the 21st Century economy. Sustainable excellence will require genuine changes in behavior and greater resilience in the face of changing conditions. It will also require recognizing the important contributions of all segments of Virginia postsecondary education: public, private non-profit and proprietary.

Goal 3.0 requires three distinct yet interconnected strategies:

- Continue to invest in the abiding elements of Virginia postsecondary education excellence;
- Invest in activities critical to future competitiveness; and
- Commit to greater resilience: productivity, performance and responsiveness.

Achieving sustainable excellence will require a shared understanding of the value of postsecondary education as a public investment that is critical to the prosperity and wellbeing of the Commonwealth and its people. This shared understanding will enable commitment among SCHEV and the rest of the Executive branch, the General Assembly, institutional leadership, business, other stakeholders and the citizens of the Commonwealth. Such bipartisan agreement is needed to enable consistent, continuing investment in postsecondary education in the future as well as institutional responsiveness to calls for increased productivity and performance to meet the needs of the time.

Strategy 3.1. Continue to invest in the abiding elements of Virginia postsecondary education excellence

Virginia postsecondary education represents a successful investment for the Commonwealth. Virginia's constellation of public colleges and universities is well regarded across the country, and Virginia generally is regarded as "getting more bang for their buck" than many state systems of higher education. But maintaining a competitive position cannot be taken for granted; there are serious issues to be addressed. Previous strategies have already spoken to the deterioration in affordability and the needs for affordable access and optimized student success. However, faculty salaries at most public institutions have lost ground in comparison to their peers and are in danger of being uncompetitive, and research funding is becoming increasingly competitive. At the heart of the issue is the reduction in state

appropriations per student, in real terms, during the recent recession. This reduction has left the Commonwealth roughly \$1B underfunded relative to its formula-recommended level.

To be realistic, the strategic plan must recognize that, in the current political and economic environment, rapidly restoring the \$1B shortfall is unlikely. Over the course of this strategic plan's timeframe, however, the citizens of the Commonwealth must be engaged in a dialogue about the importance of restoring funding on the road to achieving affordable access, student success, sustainable excellence and economic prosperity.

Possible initiatives under this strategy could be:

Initiative 3.1.1. Develop leaders at all levels, including Council, institutional Boards of Visitors and institutional and institutional executive leadership.

Initiative 3.1.2. Maintain academic quality, competitive salaries and operating resources.

Initiative 3.1.3. Re-establish an adequate and dependable level of state funding. Close the \$1B formula funding gap. Consider constitutionally mandated investment in higher education. Invest increased state funding in high impact programs, incentives and initiatives.

Strategy 3.2. Invest in activities critical to future competitiveness

In addition, Virginia should invest in a range of future activities that are critical to future success and competitiveness. These activities, tools and practices will be critical in reaching new learners, stakeholders and revenue streams; raising levels of performance and productivity; and enabling greater integration of research and public service to support the Commonwealth's prosperity. The new activities include:

- New modes of learning and experience (e.g. online learning, personalized learning, service/experiential learning, global/international);
- Innovations in learning/experiences that can be taken to scale within and among institutions;
- Deploying and leveraging technology-based tools and practices that can be utilized to enhance learning and improve productivity and performance;
- Enhancing and integrating research, innovation, commercialization and entrepreneurship;
- Encouraging collaboration partnerships among public and private entities; and
- New and/or revitalized/enhanced revenue streams (e.g. online learning, degree completion, new programs, commercialization/ventures, philanthropy, global/international experiences, continuing professional development).

Many of these are incorporated in the current strategic plans of Virginia institutions. But many institutions risk being left behind over the coming decades if they do not develop these tools and competences. Possible initiatives could include:

Initiative 3.2.1. Develop new modes of teaching and learning; identify ways to take productive innovations to scale and establish new revenue streams to support them.

Initiative 3.2.2. Leverage technology-based tools, practices and experiences in both administration and pedagogy.

Initiative 3.2.3. Identify and develop strategic priorities for research, innovation, commercialization and entrepreneurship, and encourage related collaborations and partnerships with business.

Strategy 3.3. Commit to greater resilience, responsiveness and productivity in Virginia postsecondary education

To thrive in the face of disruptive challenges such as those that Virginia will face over the timeframe of this strategic plan period, institutions must be more resilient. This will require the rethinking of existing legacy programs and offerings and achieving higher levels of productivity and performance. Goals 1.0 and 2.0 have already mentioned that achieving affordable access and optimizing student success have substantial potential. The following productivity and performance enhancement gains are available to institutions:

- **Learner Focused (Goals 1.0 and 2.0)**
 - ✓ Improving readiness for college and reducing remediation
 - ✓ Improving graduation rates and student success
 - ✓ Accelerating completion, reducing total cost of completion
- **Learning-Focused**
 - ✓ Leveraging technology to create new modes of learning that enhance learning performance and productivity
- **Process-Focused**
 - ✓ Leveraging technology to reinvent academic, support and administrative processes, gaining efficiencies and improving performance
 - ✓ Utilizing collaboration and shared services to make high performance available to all institutions at lower costs
- **Program-Focused**
 - ✓ Realigning program priorities and resources based on performance and demand, freeing up resources for innovation funds and other allocations.

Many of these productivity/performance gains are already being pursued. In the future, these efforts are likely to be even more important as Virginia postsecondary education makes its case for increased support from the Commonwealth. SCHEV has a direct and indirect role to play in productivity improvement and performance enhancement.

In addition to the need to improve productivity and performance, institutions are addressing the need to realign their distribution of resources. The costs of learning, academic support, administration and campus amenities (auxiliaries plus bonded debt) have attracted substantial attention in JLARC reports and from other sources, driven by factors such as:

- Expenditures on administrative support have grown relative to expenditures on learning;
- Auxiliaries (athletics, food services, residential life) have become a larger part of the enterprise;
- Fund raising has grown in size and importance and these expenditures are critical to raising funds used to support instruction and functions relating to economic prosperity;
- Research (administration and commercialization, plus research facilities) have become a greater part of many universities' enterprises; and
- Growth in many categories of administrative expenditures (student services, research administration).

Many of these changes have been due, at least in part, to state and federal mandates. Others (auxiliary enterprises such as athletics, food service, residence halls) are associated with their own revenue streams. The question is: Should institutions rethink the balance between instructional costs and academic support and administration? Should institutions realign their operations? Should this be part of program prioritization? These conversations should frame the nature of the initiatives necessary to achieve Goal 3.0.

Potential initiatives include:

Initiative 3.3.1. Streamline state regulations and unfunded mandates

Initiative 3.3.2. Expand/launch institutional programs to improve productivity, efficiency and value (set stretch goals). Pursue shared services opportunities among departments and schools in academic support and administrative services.

Initiative 3.3.3. Build resilience through a process of ongoing program reinvention and new offerings that are responsive to emerging needs.

Initiative 3.3.4. Refine capital construction models to fit 21st Century needs that include upgrades for technology and communication tools.

Initiative 3.3.5. Consolidate back office functions and specialized offerings through shared services. Examples already exist in Virginia institutions.

Goal 4.0—Advance the economic prosperity of the Commonwealth

Postsecondary education contributes to the economic prosperity of the Commonwealth in four distinct ways:

- Virginia postsecondary education is critical to the competitiveness of the workforce at all levels of training and education. In today’s global economy, effective training and education at all levels determines competitiveness.
- Moreover, economic development has become an increasingly important contribution of postsecondary education, which can be used to raise the fortunes of communities across the Commonwealth. This is especially important in Virginia with its dramatic differences in regional economies and levels of prosperity.
- Research and the related commercialization of new ideas and business development/entrepreneurship have become increasingly important and the subject of greater focus by Virginia colleges and universities.
- Public service has expanded to include business development, innovation, entrepreneurship and venture funding. This development is likely to become increasingly important as campuses “open up” and welcome greater participation from a wide variety of external partners.

The following strategies support these four elements.

Strategy 4.1. Build a competitive, well-educated and trained workforce at all levels

Virginia postsecondary education needs to meet the requirements of the economy and society at all levels from certificates through doctorates. This necessitates alignment of curricula and program offerings with TJ21 goals and workforce needs. The Strategic Plan for the Virginia Community College System provides for tripling the number of degrees and certificates awarded over the next decade.

While training and education provide substantial benefits to the individual, building a strong and competitive workforce from top to bottom require strong public investment, including needs-based aid for learners

Possible initiatives could include:

Initiative 4.1.1. Align curricula and program offerings with TJ21 goals and workforce needs.

Initiative 4.1.2. Adjust measurement to include all postsecondary certificates and degrees and adjust goals accordingly. Regularly update to reflect the effect of new technologies and jobs.

Initiative 4.1.3. Provide adults with opportunities to work with employers, employment offices, WIBs, other job prep programs and adult education programs.

Initiative 4.1.4. Audit the availability/adequacy of needs-based aid.

Strategy 4.2. Provide for the economic development of communities and regions of the Commonwealth

As economic development has become a more active and recognized function, the Virginia Economic Development Partnership (VEDP), University-Based economic Development (UBED) and partnerships like the Tobacco Commission have worked to leverage the economic development potential of Virginia's colleges and universities. Such efforts are likely to grow in importance over the next five to ten years as Virginia works to develop its metropolitan regions that are the primary economic engines for the Commonwealth and to improve conditions in the less developed regions.

Possible initiatives could include:

Initiative 4.2.1. Work with Virginia Economic Development Partnership (VEDP) and University Based Economic Development (UBED) to expand the economic development impact of Virginia's colleges and universities.

Initiative 4.2.2. Leverage community colleges, research centers and universities in the "Rural Horseshoe" to expand economic development in the communities in which they are located.

Strategy 4.3. Support research that creates new knowledge and leads to commercialization of new products and ventures

The research and development activities in Virginia's public institutions are critical to our competitive position in the 21st Century Knowledge Economy. Virginia's level of sponsored research has seen growth over the past decade, but it is currently challenged by the growing competitiveness for federal funding, which is likely to become even more contested, and the need to grow research activity in the major metropolitan areas, where it can build the competitiveness of those regions. Virginia will likely need to concentrate on building research centers of excellence and collaborative efforts that build scale in key areas of expertise. Moreover, Virginia should find ways to expand research collaborations and experiences for undergraduate students through regional and state-level collaborations.

Possible initiatives could include:

Initiative 4.3.1. Support the growth and development of sponsored research at Virginia universities and colleges. Encourage businesses to participate in advisory councils and tap intellectual property through the institutions.

Initiative 4.3.2. Focus on the development of university research centers of excellence and large-scale collaborations to leverage the impact.

Initiatives 4.3.3. Support participation by students in research and entrepreneurship through regional and statewide collaborations.

Strategy 4.4. Encourage and expand public service that meets the needs of the Virginia economy

Over the next decade, Virginia’s colleges and universities will become far more “open” to public service and collaborative activities that attract businesspeople, entrepreneurs, venture capitalists, social entrepreneurs and community problem solvers to campus. Formal structures such as Cooperative Extension will become even more active, and they will be joined by informal and network-based activities that will engage with campus expertise and bring external expertise and know-how to campus. Entrepreneurship and innovation experiences will become essential elements of many academic programs and of the co-curricular experiences of students – this is already happening on many campuses. Virginia Tech, UVa, George Mason, VCU and many community colleges have substantial entrepreneurial activities on campus and are streamlining their policies and practices for even greater involvement, including through regional and statewide collaborations.

Possible initiatives could include:

- Initiative 4.4.1.** Extend the work of Virginia Cooperative Extension to reach new stakeholders around new issues.
- Initiative 4.4.2.** Support campus-based incubators and business development centers in launching ventures.
- Initiative 4.4.3.** Support the opening of campuses to greater levels of entrepreneurship, commercialization and interaction and make efforts to streamline commercialization and venturing and eliminate impediments to such activities.

Goal 5.0—Frame a compelling narrative for postsecondary education

Goals 1.0 through 4.0 provide the context for Goal 5.0: Frame a Compelling Narrative for Higher Education. Like all other states, Virginia needs to reaffirm the public’s interest in public investment in the learning, research and public service functions of Virginia’s colleges and universities in the 21st Century. If effectively presented, over time this narrative can lead to the restoration of public funding as well as mobilize collective action and support from business, philanthropies, social agencies and other groups who have interests in the prosperity and well-being of the Commonwealth and its people.

Strategy 5.1. Mobilize key leadership to proclaim the need for public support of Virginia postsecondary education

The first step is to mobilize SCHEV, university and community college presidents, K-12 education leaders, members of Boards of Visitors, business leaders and other prominent Virginians to provide compelling reasons to support the public interest in Virginia postsecondary education. This mobilization should concentrate on building trust among leadership and on what it will take to inspire and win the confidence of Virginians to increase their investment. It should provide a compelling narrative that demonstrates both the critical nature of postsecondary education’s contribution to the prosperity of the Commonwealth and the committed stewardship of its leaders to deliver affordable access, optimized success, sustainable excellence and greater resilience and productivity.

Possible initiatives could include:

Initiative 5.1.1. Mobilize SCHEV, university and community college presidents, K-12 leaders, business leaders and other prominent Virginians.

Initiative 5.1.2. Foster trusted relations among leaders, especially between Council members and the Boards of Visitors.

Strategy 5.2. Develop a communication plan around the persuasive compelling narrative

At the same time that leadership is being mobilized and energized around the compelling narrative, a professional communications plan should be developed to present the importance of public support for postsecondary education. This plan should include scenarios defining the possible loss to the Commonwealth's long-term economic competitiveness if public support and affordability continue to erode.

Possible initiatives could include:

Initiative 5.2.1. Develop a communications plan with targeted messages about the importance of public support of education in the face of international and national competition.

Initiative 5.2.2. Create scenarios of the possible effect on Virginia's competitiveness if public support and affordability continue to erode.

Strategy 5.3. Utilize multiple channels to engage stakeholders

The public awareness campaign should leverage every opportunity to engage the public in discussion about the value of postsecondary education and the challenges it faces.

Possible initiatives could include:

Initiative 5.3.1. Launch the public awareness campaign and leverage opportunities to engage the public in discussions about the value of higher education and the challenges it faces.

Initiative 5.3.2. Provide for continuing communication to maintain public support for investment in postsecondary education.

In order to identify meaningful indicators that assess progress toward the accomplishment of the goals, performance metrics and targets should be developed at the Goal, Strategy and Initiative levels.

Possible areas around which to develop performance measures or metrics are provided in Appendix 8: Possible Areas for Measurement to Assess Progress toward Goals and Strategies.

Impacts of Key Elements Across the Five Goals

Finally, these Goals and Strategies should be examined in a variety of ways. For example, Table 3: Effects across the five Goals of four key elements: affordable net price, tuition differentiation strategy, productivity improvement, cost reduction illustrates how those four key topics cut across the five Goals. This comparison suggests how these elements can be combined to focus on areas of greatest gain for individual institutions and the Commonwealth.

Table 3: Effects across the five Goals of four key elements: affordable net price, tuition differentiation strategy, productivity improvement, cost reduction

Elements	Achieve Affordable Net Price for Students				
SCHEV Involvement:	<i>SCHEV can play a major role in achieving affordable net price.</i>				
Definition:	Net Price (Tuition + Fees – Financial Aid), compared to family means, is the key issue to learners and their families. Net price can be affected by increasing and/or stabilizing state appropriations, cost reduction, enhanced needs-based aid, and/or raising funds from other sources to provide needs-based aid or hold down tuition levels. One possible measure is: when students from median income families in Southwest Virginia can attend college and complete their baccalaureate learning objectives with no debt.				
Major Challenge:	Achieving affordable net price will require some combination of substantially greater funds for needs-based aid (from the state or other sources), and/or reallocation from institutional productivity gains and cost reduction.				
Impact:	Goal 1.0— Provide Affordable Access	Goal 2.0— Optimize Student Success	Goal 3.0— Achieve Sustainable Excellence	Goal 4.0— Advance Economic Prosperity of the Commonwealth	Goal 5.0— Frame a Compelling Narrative
	If affordable net price is achieved and is clearly explainable and understandable to students and their families, it will enhance enrollment. Transparency will be a challenge.	Unaffordability and indebtedness are major impediments to student completion. If it is explainable and understandable, affordable net price should improve and accelerate completion rates.	Achieving greater affordability in the face of stagnating family resources is an imperative for institutional sustainability. Achieving affordability will enhance sustainability.	Residual loan debt is an anchor on economic growth. Loan burdened students are impeded from starting families, launching businesses, and attaining home ownership. This will be a drag on our economy for years to come. In conjunction with changes in federal loan repayment regulations, affordable net price should reduce the size and burden of student loans and repayment.	A compelling narrative for higher education will require addressing the affordability issue, which research indicates is top of mind for the citizens of the Commonwealth. Providing and communicating affordability relief and means of achieving it will be highly popular, especially if efforts are sustainable.

Element:	Tuition Differentiation Strategy				
SCHEV Involvement:	<i>SCHEV has a strong policy role to play in coordinating this strategy and working its implications throughout the Virginia higher education network.</i>				
Definition:	<i>Allow high-demand institutions to raise their tuition to market levels, then invest greater amounts in needs-based aid for low income and lower middle income students. Virginia is already moving down the path of differentiated tuition strategies for some of its high demand institutions. Several key questions remain: 1) whether this will include allowing greater number of out-of-state students and granting even greater autonomy to those institutions to manage their affairs, 2) what reductions in General Fund resources would these institutions receive in return for even greater autonomy, market-level tuition, and increased out-of-state funding, 3) what level of needs-based aid would be required to offset the impact of tuition increases on low- and even middle-income students and their families.</i>				
Major Challenge:	<i>1) Achieving the balance between tuition level, in-state enrollment and needs based aid; 2) Ensuring that needs-based aid is sufficient to achieve enrollment goals, especially at high-demand institutions, 3) Deciding whether needs-based aid should be administered by SCHEV or the institutions.</i>				
Impact:	Goal 1.0— Provide Affordable Access	Goal 2.0— Optimize Student Success	Goal 3.0— Achieve Sustainable Excellence	Goal 4.0— Advance Economic Prosperity of the Commonwealth	Goal 5.0— Frame a Compelling Narrative
	Enables high-demand institutions to leverage their market position. Raises substantial new revenue, much of which can be directed to needs-based aid. This does not provide needs-based aid for other public institutions unless state appropriations are reallocated. The Tuition Differentiation Strategy could be part of a larger scale vision to increase the autonomy of high-demand universities.	This strategy should improve success for needy students at high-demand institution. If this strategy enabled substantial increases in needs-based aid, it could substantially improve completion success at all institutions.	For high-demand institutions, tuition differentiation can improve sustainability. Other public institutions with lower tuitions may experience greater demand due to their relatively lower tuition.	If this strategy supports the development of an affordable net price outcome, it will positively impact Economic Prosperity and Vitality.	This strategy will be unpopular with some, depending on how high tuitions rise, how much needs-based aid is available for students, and how far into the middle-income range the aid reaches.

Element:	Productivity/Performance Improvements				
SCHEV Involvement:	<i>SCHEV has a direct and indirect role to play in productivity improvement and performance enhancement.</i>				
Definition:	<p><i>The most accessible productivity and performance gains available to institutions and higher education in general are in Goals 1.0 and 2.0. Productivity/performance improvement for higher education has many facets:</i></p> <p><u>Learner Focused</u></p> <ul style="list-style-type: none"> ✓ Improving readiness for college and reducing remediation ✓ Improving graduation rates and student success ✓ Accelerating completion, reducing total cost of completion <p><u>Learning-Focused</u></p> <ul style="list-style-type: none"> ✓ Leveraging technology to create new modes of learning that enhance performance and productivity <p><u>Process-Focused</u></p> <ul style="list-style-type: none"> ✓ Leveraging technology to reinvent academic, support and administrative processes, gaining efficiencies and improving performance. ✓ Utilizing collaboration and shared services to make high performance processes available to many institutions. <p><u>Program-Focused</u></p> <ul style="list-style-type: none"> ✓ Realigning programs priorities based on performance and demand, reallocating resources. 				
Major Challenge:	<p><i>1) Engaging faculty, students and administrators to ensure that academic quality is maintained or enhanced – improved productivity cannot come at the cost of deteriorating quality; 2) Achieving productivity gains that are continuing and sustainable, not one-time; 3) Making productivity gains a commitment at the institutional level.</i></p>				
Impact:	<p>Goal 1.0— Provide Affordable Access</p> <p>Productivity improvement in accelerating completion and reducing total cost of completion can dramatically impact affordability and should be a key part of Goal 1.0.</p>	<p>Goal 2.0— Optimize Student Success</p> <p>Improving readiness for college and reducing remediation can create productivity gains for both K-12 and higher education (avoiding teaching the same thing 2-3 times). This must be a fundamental element of Goal 2.0.</p>	<p>Goal 3.0— Achieve Sustainable Excellence</p> <p>Sustainable excellence in the 21st Century will require institutional commitments to:</p> <ul style="list-style-type: none"> • New modes of learning to enhance performance and productivity • Leveraging technology to improve performance and productivity and to reinvent academic, 	<p>Goal 4.0— Advance Economic Prosperity of the Commonwealth</p> <p>All of the contributors to economic prosperity – learning, research, and public service will need to achieve higher levels of performance and productivity to make the Commonwealth competitive in the 21st Century. Research and related public</p>	<p>Goal 5.0— Frame a Compelling Narrative</p> <p>Productivity gains and performance enhancement will be a key part of the compelling narrative of higher education in service to the prosperity and well-being of the Commonwealth. In order to receive new levels of funding from the state and other funding sources,</p>

			<p>administrative and support processes.</p> <ul style="list-style-type: none"> • Realigning programs and reallocating resources • Utilizing collaboration and shared services • Discovering new programs, experiences and revenue streams. <p>These productivity gains and performance enhancements will occur at the institutional level. SCHEV's role is to influence and incentivize institutions to launch and expand robust productivity, efficiency and performance improvement initiatives affecting learning, processes/ services, and programs.</p>	<p>services (outreach, commercialization, entrepreneurship and innovation) will need to engage more participants and create new and greater outcomes through public/private partnerships and other means.</p>	<p>institutions will need to demonstrate their commitment to vigorously improving performance to new levels and enhancing productivity/efficiency.</p>
--	--	--	--	---	--

Element:	Cost Reduction and Realignment					
SCHEV Involvement:	<i>SCHEV can play an important indirect role in helping institutions identify duplicative activities and resources and develop cross-institution sharing strategies.</i>					
Definition:	<p><i>The cost of learning, academic support, administration and campus amenities (auxiliaries plus bonded debt) have attracted substantial attention in the JLARC Report, and other sources:</i></p> <ul style="list-style-type: none"> • <i>Expenditures on administrative support have grown relative to expenditures on learning.</i> • <i>Auxiliaries (athletics, food services, residential life) have become a larger part of the enterprise.</i> • <i>Fund raising has grown in size and importance and these expenditures are critical to raising funds used to support instruction and functions relating to economic prosperity.</i> • <i>Research (administration and commercialization, plus research facilities) have become a greater part of many university's enterprises.</i> • <i>Growth in many categories of administrative expenditures (student services, research administration).</i> 					
Major Challenge:	<i>1) Rethinking the balance between instructional costs and academic support and administration, and making tough choices about program prioritization, 2) Identifying new services that are worth the investment – such as philanthropy and institutional development.</i>					
Impact:	<p>Goal 1.0— Provide Affordable Access</p> <p>Given that current budgetary restrictions are likely to persist, controlling or reducing the cost of education will be a key component of limiting increases in net price.</p>	<p>Goal 2.0— Optimize Student Success</p> <p>Support services contributing toward student success are non-instructional expenditures. These improve student success if done well, so maintaining quality of service while controlling costs is critical.</p>	<p>Goal 3.0— Achieve Sustainable Excellence</p> <p>As part of their efforts to establish long-term sustainability, institutions should review program priorities – academic, academic support and administrative – and establish the proper balance necessary for achieving these five goals sustainably. They should also commit to managing costs in these areas, and reducing them where possible.</p>	<p>Goal 4.0— Advance Economic Prosperity of the Commonwealth</p> <p>Many of the expenditures that contribute to economic prosperity – research, commercialization, entrepreneurship and other forms of public services – are non-instructional expenditures.</p>	<p>Goal 5.0— Frame a Compelling Narrative</p> <p>As part of the “grand bargain” expressed in the compelling narrative, higher education should deal with the need to manage and realign costs.</p>	

Appendix 1: Sample Goals from Other State Board Plans

Below are examples of **goals** from five other state boards that actually used the term “goals.” As is shown, there are similarities in themes—quality and excellence, access, affordability, success, economic growth and diversity. There are also some themes that appear in only one of the state plans: data and distribution, distance learning and productivity.

Table 4: Five state plans with goals

Maryland - Goals	State University System of Florida - Goals	The Florida College System - Goals	Arizona State University System - Goals	ConnSCU - Goals
Quality and Effectiveness	Excellence	Increase College Readiness and Success	Educational Excellence	A Successful First Year Student Success
Access, Affordability and Success		Expand and Maintain Access		Affordability and Sustainability
Diversity				Equity
Innovation		Enhance Distance Learning	Research Excellence	Innovation and Economic Growth
Economic Growth and Development	Strategic Priorities for a Knowledge Economy	Prepare for Careers	Community Engagement and Workforce Development	
Data and Distribution	Productivity		Productivity	

Source: JBLA/SI/Zelos analysis of coordinating and governing board strategic plans, 2014.

Next, state plans that do not use the term “goals,” but use other similar concepts instead, are shown. The original order of these concepts was retained as the order may signify priority or preference. See also below Links to Select State Governing or Coordinating Body Plans.

Table 5: Three state plans with Big Ideas, Strategic Imperatives or Strategic Directions

SUNY – Six Big Ideas	University System of Georgia – Strategic Imperatives	UNC System – Strategic Directions
SUNY and the Entrepreneurial Century	Commitment to Academic Excellence and Degree Completion	Setting Degree Attainment Goals Responsive to State Needs
SUNY and the Seamless Educational Pipeline	Commitment to Economic Development and World Class Research	Strengthening Academic Quality
SUNY and a Healthier New York	Commitment to Accountability, Efficiency and Leadership in Higher Education	Serving the People of North Carolina
SUNY and an Energy-Smart New York		Maximizing Efficiencies
SUNY and the Vibrant Community		Ensuring an Accessible and Financially Sustainable University
SUNY and the World		

Source: JBLA/SI/Zelos analysis of coordinating and governing board strategic plans, 2014.

A few Vision and Mission statements (and any accompanying explanation) from other state board strategic plans were also reviewed, for context.

1- Connecticut State Colleges and Universities

Our Vision for ConnSCU

Connecticut State Colleges and Universities will continually increase the number of students completing personally and professionally rewarding academic programs.

ConnSCU’s Mission

Connecticut State Colleges and Universities provide affordable, innovative and rigorous programs in settings that permit an ever increasing number of students to achieve their personal and career goals as well as contribute to the economic growth of the state of Connecticut

Why this Vision and Mission?

- ConnSCU institutions have long been the affordable provider of high quality post-secondary education for the largest segment of college-going Connecticut residents.
- ConnSCU has the mission, resources and scale to meet the increasing demand for post-secondary education.
- Almost all ConnSCU students come from Connecticut and stay here after graduation.
- Life and career challenges are continually increasing the demands on Connecticut residents for rigorous and relevant knowledge and skills. Completion alone is not enough; continual improvement in the quality and relevance of education programs must go hand-in-hand.
- Increasing the number of our graduates will have an economic multiplier effect that creates a significant benefit to our state as a whole.

2-SUNY of New York

The **mission** of the state university system shall be to provide to the people of New York educational services of the highest quality, with the broadest possible access, fully representative of all segments of the population in a complete range of academic, professional and vocational postsecondary programs including such additional activities in pursuit of these objectives as are necessary or customary. These services and activities shall be offered through a geographically distributed comprehensive system of diverse campuses which shall have differentiated and designated missions designed to provide a comprehensive program of higher education, to meet the needs of both traditional and non-traditional students and to address local, regional and state needs and goals. In fulfilling this mission, the state university shall exercise care to develop and maintain a balance of its human and physical resources that:

- recognizes the fundamental role of its responsibilities in undergraduate education and provides a full range of graduate and professional education that reflects the opportunity for individual choice and the needs of society;
- establishes tuition which most effectively promotes the university's access goals;
- encourages and facilitates basic and applied research for the purpose of the creation and dissemination of knowledge vital for continued human, scientific, technological and economic advancement;
- strengthens its educational and research programs in the health sciences through the provision of high quality general comprehensive and specialty health care, broadly accessible at reasonable cost, in its hospitals, clinics and related programs and through networks and joint and cooperative relationships with other health care providers and institutions, including those on a regional basis;

- shares the expertise of the state university with the business, agricultural, governmental, labor and nonprofit sectors of the state through a program of public service for the purpose of enhancing the well-being of the people of the state of New York and in protecting our environmental and marine resources;
- encourages, supports and participates through facility planning and projects, personnel policies and programs with local governments, school districts, businesses and civic sectors of host communities regarding the health of local economies and quality of life; and
- promotes appropriate program articulation between its state-operated institutions and its community colleges as well as encourages regional networks and cooperative relationships with other educational and cultural institutions for the purpose of better fulfilling its mission of education, research and service.

3-Washington Student Achievement Council (formerly, Washington State Higher Education Coordinating Board)

Mission

We advance educational opportunities and attainment in Washington. In pursuit of our mission, the Washington Student Achievement Council:

- Leads statewide strategic planning to improve educational coordination and transitions.
- Supports Washingtonians through the administration of financial aid, a college savings plan and support services.
- Advocates for the economic, social and civic benefits of postsecondary education.⁴

Vision

We inspire and foster excellence in educational attainment.

4-Tennessee Higher Education Commission

Mission

The Tennessee Higher Education Commission is the state's coordinating agency for higher education. Guided by the Public Agenda for Tennessee Higher Education, THEC oversees an array of finance, academic, research and consumer protection initiatives that promote student success and support the State's completion agenda for postsecondary education. THEC actively seeks to develop policy recommendations, programmatic initiatives and partnerships that increase educational attainment in the state while improving higher education access and success for all Tennesseans.

⁴ <http://www.wsac.wa.gov/mission-and-vision>

Links to Select State Governing or Coordinating Body Plans

- “The Arizona Higher Education Enterprise: Five Year Strategic Plan 2014-2018.” The Arizona University System, <http://azregents.asu.edu/ABOR%20Reports/Arizona-University-System-5-year-strategic-plan-2013-2017.pdf>.
- “The California Master Plan for Education.” Joint Committee to Develop a Master Plan for Education. http://www.cpec.ca.gov/CompleteReports/ExternalDocuments/2002_FINAL_COMPLETEMASTERPLAN_2.PDF
- “Higher Education Strategic Plan: FY 2013-2014.” Colorado Department of Higher Education, January 2013. http://highered.colorado.gov/Publications/General/StrategicPlanning/201314_HED_Strategic_Plan.pdf.
- “Strategic Plan 2012-2025.” State University System of Florida, November 10, 2011. http://www.flbog.edu/pressroom/doc/2011-11-28_Strategic_Plan_2012-2025_FINAL.PDF.
- “Stepping Up: A Strategic Plan for the Florida College System: 2013-13 to 2017-2018.” The Florida College System. http://www.fldoe.org/fcs/pdf/FCSStrategicPlan_2012.pdf.
- “USG Strategic Plan: Framework of the Strategic Plan and Public Agenda for the University System of Georgia.” University System of Georgia. <http://www.usg.edu/strategicplan/>.
- “2010-2016 Strategic Plan: Transforming Lives. Strengthening Iowa Through Education, Research, and Service.” Board of Regents, State of Iowa, March 19, 2014. <http://www.regents.iowa.gov/StratPlan/StrategicPlan2010-2016.pdf>.
- “Maryland Ready: 2013-2017 Maryland State Plan for Postsecondary Education.” Maryland Higher Education Commission. http://www.mhec.state.md.us/higherEd/2004Plan/2013%20Maryland%20State%20Plan/MHECStatePlan_2014.pdf.
- “2012-2016 Strategic Plan.” Midwestern Higher Education Compact, November 18, 2012. <http://www.mhec.org/2012-2016-strategic-plan>.
- “Strategic Framework for Minnesota State Colleges and Universities.” Minnesota State Colleges & Universities, January 2012. <http://www.mnscu.edu/system/planning/docs/Strategic%20Framework%20%20JAN-2012.pdf>.
- “Board of Regents’ MUS Strategic Plan 2014.” Montana University System, January 2014. <http://www.mus.edu/data/StratPlan/MUS%20Strat%20Plan%202014%205-8-14.pdf>.
- “Statewide Plan for Higher Education 2004-2012.” Office of Higher Education, New York State Education Department. <http://www.highered.nysed.gov/swp/>.

- “Strategic Plan 202: Rising to the Challenge.” Pennsylvania State System of Higher Education.
http://www.passhe.edu/inside/bog/Documents/Strategic%20Plan%202020%20Rising%20to%20the%20Challenge_dh.pdf.
- “THEC: Plan of Action.” Tennessee Higher Education Commission.
http://tennessee.gov/thec/Divisions/PPR/planning/plan_of_action.html.
- “Framework for Advancing Excellence throughout the University of Texas System: Action Plan.” The University of Texas System. <https://www.utsystem.edu/documents/docs/chancellor/framework-advancing-excellence-throughout-university-texas-system-action-p>.
- “Critical Crossroads: A Call for Action – The 2012 Strategic Action Pan for Educational Attainment.” Washington Student Achievement Council, December 2012.
http://www.wsac.wa.gov/sites/default/files/Critical_Crossroads-Revised4-13.pdf.
- “Strategic Master Plan Update 2012: Raising Attainment During Challenging Economic Times.” Washington Higher Education Coordinating Board.
<http://www.wsac.wa.gov/sites/default/files/SMP2012Update.pdf>.
- “Strategic Plan: Fiscal Years 2011-2014.” Draft for Public Comment, U.S. Department of Education.
<http://www2.ed.gov/about/reports/strat/plan2011-14/draft-strategic-plan.pdf>.

Appendix 2: Sections from Institutional Strategic Plans for Virginia Universities and Select Community Colleges, as of July 2014

Institution	Christopher Newport University, retrieved August, 2014
Vision	We aspire to be a preeminent, public liberal arts and sciences university.
Mission	The mission of Christopher Newport University is to provide educational and cultural opportunities that benefit CNU students, the residents of the Commonwealth of Virginia and the nation.
Priorities	A Vital Curriculum A Culture of Student Learning and Engagement An Inspired Faculty A Purposeful Campus Community An Engagement between the Campus and Larger Community
Goals	Goals and Strategies are aligned with each Priority area.

Institution	College of William and Mary, FY2014-2018
Seven Challenges	Be a leader among liberal arts universities Build and support a more fully diverse W&M community Foster stronger global perspectives and connections Develop an ever more engaging campus experience that inspires a lifelong commitment to W&M Develop and implement a business plan that maximizes revenue sources and ensures transparent resource allocation in support of College priorities and needs Provide the administrative resources and infrastructure required for a university in the 21st century Explain and promote W&M through an even more effective communications structure and strategy.
Two Key Challenges	The Liberal Arts University New Financial Model
Vision	Breaking Boundaries. Across the university's undergraduate, professional and graduate schools, students will develop the critical thinking and understanding of diverse perspectives essential to excel in the 21st Century. William & Mary will boldly innovate in interdisciplinary study, internationalization and faculty-student inquiry.

Institution	College of William and Mary, FY2014-2018
Mission	<p>The College of William & Mary, a public university in Williamsburg Virginia, is the second-oldest institution of higher learning in the United States. Established in 1693 by British royal charter, William & Mary is proud of its role as the Alma Mater of generations of American patriots, leaders and public servants. Now, in its fourth century, it continues this tradition of excellence by combining the best features of an undergraduate college with the opportunities offered by a modern research university. Its moderate size, dedicated faculty and distinctive history give William & Mary a unique character among public institutions and create a learning environment that fosters close interaction among students and teachers.</p> <p>The university's predominantly residential undergraduate program provides a broad liberal education in a stimulating academic environment enhanced by a talented and diverse student body. This nationally acclaimed undergraduate program is integrated with selected graduate and professional programs in five faculties - Arts and Sciences, Business, Education, Law and Marine Science. Masters and doctoral programs in the humanities, the sciences, the social sciences, business, education and law provide a wide variety of intellectual opportunities for students at both graduate and undergraduate levels.</p> <p>At William & Mary, teaching, research and public service are linked through programs designed to preserve, transmit and expand knowledge. Effective teaching imparts knowledge and encourages the intellectual development of both student and teacher. Quality research supports the educational program by introducing students to the challenge and excitement of original discovery and is a source of the knowledge and understanding needed for a better society. The university recognizes its special responsibility to the citizens of Virginia through public and community service to the Commonwealth as well as to national and international communities. Teaching, research and public service are all integral parts of the mission of William & Mary.</p>
Goals	<p>To attract outstanding students from diverse backgrounds;</p> <p>To develop a diverse faculty which is nationally and internationally recognized for excellence in both teaching and research;</p> <p>To provide a challenging undergraduate program with a liberal arts and sciences curriculum that encourages creativity, independent thought and intellectual depth, breadth and curiosity;</p> <p>To offer high quality graduate and professional programs that prepare students for intellectual, professional and public leadership;</p> <p>To instill in its students an appreciation for the human condition, a concern for the public well-being and a life-long commitment to learning; and</p> <p>To use the scholarship and skills of its faculty and students to further human knowledge and understanding and to address specific problems confronting the Commonwealth of Virginia, the nation and the world.</p>

Institution	George Mason University, 2014-2024
Motto	Freedom and Learning
Vision	A University <i>for</i> the World
Mission	A public, comprehensive, research university established by the Commonwealth of Virginia in the National Capital Region, we are an innovative and inclusive academic community committed to creating a more just, free and prosperous world.
Goals	<p>Goal 1 – Innovative Learning</p> <p>Goal 2 – Accessible Pathways</p> <p>Goal 3 – Return on Investment</p> <p>Goal 5 – Innovation Engine</p> <p>Goal 6 – Community Builder</p> <p>Goal 7 – Well-being</p> <p>Goal 8 – Diverse Academic Community</p> <p>Goal 9 – Support Teaching and Scholarship Excellence</p> <p>Goal 10 – Elevate Research</p> <p>Goal 11 – Research of Consequence</p> <p>Goal 12 – Global Learning Platform</p>
Values	<p>Our core values capture the guiding principles for how we work with each other and how we make decisions when we are at our best. They are the foundation of the type of community we want to build together. These seven values are listed and explained below.</p> <ul style="list-style-type: none"> › Our students come first. <p><i>Our top priority is to provide students with a transformational learning experience that helps them grow as individuals, scholars and professionals.</i></p> <ul style="list-style-type: none"> › Diversity is our strength. <p><i>We include and embrace a multitude of people and ideas in everything we do and respect differences.</i></p> <ul style="list-style-type: none"> › Innovation is our tradition. <p><i>We strive to find new and better ways to deliver on our mission while honoring time-tested academic values.</i></p> <ul style="list-style-type: none"> › We honor freedom of thought and expression. <p><i>We protect the freedom of all members of our community to seek truth and express their views.</i></p>

Institution	George Mason University, 2014-2024
	<p>› We are careful stewards. <i>We manage the economic and natural resources entrusted to us responsibly and sustainably.</i></p> <p>› We act with integrity. <i>We hold ourselves to the highest ethical standards as educators, scholars, students and professionals.</i></p> <p>› We thrive together. <i>We nurture a positive and collaborative community that contributes to the well-being and success of every member.</i></p>

Institution	James Madison University 2014-2020
Vision	To be the national model for the engaged university: engaged with ideas and the world.
Mission	We are a community committed to preparing students to be educated and enlightened citizens who lead productive and meaningful lives.
Core Qualities	<p>Academic Quality: Outstanding Programs</p> <p>Academic Quality: Teaching, Scholarship and Research Excellence</p> <p>Access, Inclusion and Diversity</p> <p>A Culture of Philanthropy</p> <p>Engagement</p> <p>Faculty & Staff Success</p> <p>Fiscal & Facility Resources</p> <p>Innovation</p> <p>National Prominence</p> <p>Recreation and Athletics</p> <p>Student Life & Success</p>
Goals	Each Core Quality has three or more goals associated with it.
Values	Academic Quality, Community, Diversity, Excellence, Integrity and Student Focus

Institution	Longwood University
Vision	Longwood University will transform capable men and women into citizen leaders, fully engaged in the world around them. The University will be a first choice institution renowned for developing the power of citizen leadership in its students for the benefit of the greater community. [Approved by the Longwood Board of Visitors, December 8, 2007.]
Mission	Longwood University is an institution of higher learning dedicated to the development of citizen leaders who are prepared to make positive contributions to the common good of society. Building upon its strong foundation in the liberal arts and sciences, the University provides an environment in which exceptional teaching fosters student learning, scholarship and achievement. As the only four-year public institution in south central Virginia, Longwood University serves as a catalyst for regional prosperity and advancement. [Approved by the Longwood Board of Visitors, July 1997.]
Strategic Priorities	Successful Students Effective and Satisfied Faculty and Staff Financial Capacity Value for Our Community
Goals	Strategic Initiatives and Enablers are aligned with Strategic Priorities.

Institution	Norfolk State University, Building a Legacy of Excellence 2012-2018
Vision	Norfolk State University will be recognized nationally for its outstanding academic programs, innovative research, scholarship and global outreach, advancing the transformative power of education to change lives and communities.
Mission	Through exemplary teaching, scholarship and outreach, Norfolk State University transforms lives and communities by empowering individuals to maximize their potential, creating lifelong learners equipped to be engaged leaders and productive global citizens.
Goals	Create and Sustain a Culture of Academic Excellence and Success. Continue to Improve Operations, Systems and Financial Controls. Modernize Infrastructure and Facilities. Expand the Resource Base. Maximize the Norfolk State University Brand. Enhance Campus Security to Ensure a Safe Living and Learning Environment.

Institution	Norfolk State University, Building a Legacy of Excellence 2012-2018
Objectives	Objectives are aligned with the Strategic Goals.
Values	<p>Norfolk State University's strength lies in its value system. These core values embody the principles, ideals and beliefs of our students, faculty, staff and Board of Visitors. They form the foundation for our actions and reflect what is important to us as members of the Norfolk State University community:</p> <ol style="list-style-type: none"> 1. Academic Excellence – We are dedicated to fostering the highest educational standards of excellence for student achievement and faculty teaching and scholarship by creating stimulating learning environments that promote intellectual growth, innovation and discovery and lifelong learning. 2. Student-Centered Focus – Students are our top priority and we are committed to helping them become globally competitive in an enriching, stimulating and supportive environment. 3. Diversity – We embrace and respect all people, cultures, ideas, beliefs, lifestyles and perspectives. 4. Integrity and Collegiality – We expect everyone to be accountable for his or her actions and to engage in honest, ethical behavior. We value the contributions of each person, treating all with respect and civility and affirm our shared responsibility for institutional success. 5. Engagement – We assert our commitment to serve as an important strategic partner and resource for the Hampton Roads region, Commonwealth of Virginia and the nation by promoting educational attainment, cultural enrichment and economic development.

Institution	Old Dominion University, 2014-2019
Vision	Old Dominion University will be recognized nationally and internationally as a forward focused public doctoral research university with a collaborative and innovative approach to education and research that spurs economic growth, focuses on student success, engages civic and community constituents and utilizes its strong relationships with a variety of state and national partners to provide solutions for real world problems.
Mission	Old Dominion University, located in the City of Norfolk in the metropolitan Hampton Roads region of coastal Virginia, is a dynamic public research institution that serves its students and enriches the Commonwealth of Virginia, the nation and the world through rigorous academic programs, strategic partnerships and active civic engagement.

Institution	Old Dominion University, 2014-2019
Goals	<ol style="list-style-type: none"> 1. Enhance our reputation for academic and research excellence... building our national and international reputation in areas of academic and research strength 2. Support student success from first point of contact through graduation and beyond... from the first point of contact through graduation and beyond 3. Enrich the quality of university life... through academic and social activities and human resource development 4. Engage in the greater community... through social, intellectual and cultural activities 5. Build a culture of entrepreneurship and economic development... and catalyze economic development in the region
Objectives	Each goal includes four to six objectives.

Institution	Forging a Bold New Future: RU 7-17 Radford University Strategic Plan
Vision	Radford University will be among the top 50 masters universities in the nation and will become increasingly known as a model for student-centered learning, transforming its students into graduates who will be among the most sought after by the nation's best employers and who will become leaders in their communities and chosen careers in the arts, business, education, health and human services, medical professions, the humanities, the sciences and technology.
Mission	Radford University serves the Commonwealth of Virginia and the nation through a wide range of academic, cultural, human service and research programs. First and foremost, the university emphasizes teaching and learning and the process of learning in its commitment to the development of mature, responsible, well-educated citizens. RU develops students' creative and critical thinking skills, teaches students to analyze problems and implement solutions, helps students discover their leadership styles and fosters their growth as leaders. Toward these ends, the university is student-focused and promotes a sense of caring and of meaningful interaction among all members of the University community. Research is viewed as a vital corollary to the teaching and learning transaction as it sustains and enhances the ability to teach effectively. Radford University believes in the dynamics of change and has a strong commitment to continuous review, evaluation and improvement in the curriculum and all aspects of the University, so as to meet the changing needs of society.

Institution	Forging a Bold New Future: RU 7-17 Radford University Strategic Plan
Strategic Directives	Strategic Directive 1: Invest in People Strategic Directive 2: Invest in Programs Strategic Directive 3: Invest in Society: Globally and Locally Strategic Directive 4: Invest in the Future
Goals	Goals are aligned with Strategic Directives.
Values	The vision and mission of this student-centered community of learners are driven by these core values: We value, encourage and support <ul style="list-style-type: none"> •academic excellence; •collegial working relationships among students, faculty, administrators and staff; •diversity and the richness it adds to our University; •ethical behavior of all members of our University community; •fiduciary responsibility by everyone who is part of our University family; •a challenging academic environment; •intellectual and artistic curiosity and creativity; •education as a lifelong pursuit; •academic freedom and debate; •a global perspective in all faculty, staff and students; •a caring and nurturing faculty and staff; •freedom of thought and expression; •being an active partner in the viability of our region; and •shared governance and participation at all levels within the University community.

Institution	University of Mary Washington, 2009-2014
Vision	The University of Mary Washington will be a premier, nationally recognized, public liberal arts university, providing undergraduate and graduate studies in a superior environment for learning, creating knowledge and service. Building on our tradition of honor, teaching innovation, commitment to diversity and inclusiveness and collaboration with our regional community, we will prepare our students for intellectual, professional and public leadership. Embracing the diversity of the Commonwealth and beyond, the University will be both accessible and challenging, a school of choice for outstanding,

Institution	University of Mary Washington, 2009-2014
	<p>aspiring, motivated students as well as for talented faculty committed to excellence in teaching, research, professional accomplishment and contributions to the communities beyond the campus. University of Mary Washington graduates will be widely recognized as well prepared for post-graduate studies; they will be appreciated for their research and creative productivity and sought after by employers for their knowledge, skills, personal integrity and strong ethic of service.</p> <p>Offering rich cultural assets and professional development opportunities, the University will become an effective advocate for regional engagement and development and will provide leadership in areas of institutional strengths and responsibility. UMW will also be the employer of choice for those seeking an enriching work environment.</p>
Mission	<p>The University of Mary Washington is one of Virginia’s outstanding public liberal arts universities, providing a superior education that inspires and enables our students to make positive changes in the world.</p> <p>The University is a place where faculty, students and staff share in the creation and exploration of knowledge through freedom of inquiry, personal responsibility and service. UMW offers a wide range of undergraduate, graduate and professional programs, with opportunities for students to engage in disciplinary and interdisciplinary studies, to conduct research, to integrate and apply their knowledge within broad educational experiences and to develop their professional interests and practice the habits of mind necessary for life-long learning.</p> <p>UMW’s size, dedicated faculty and historical commitment to fine teaching create an institutional culture where both undergraduate and graduate students benefit from strong connections with their faculty and multiple opportunities for active learning.</p> <p>Located in Fredericksburg between our nation’s capital and the capital of the Commonwealth of Virginia, the University of Mary Washington is a nexus for engagement among diverse communities and is dedicated to improving the regional quality of life.</p> <p>We fulfill our mission by immersing students, faculty and staff in local, regional, national and international communities and by inculcating the values of honor and integrity. UMW graduates are models of adaptive learning, personal achievement, responsible leadership, service to others and engaged citizenship in a global and diverse society.</p>
Goals	<p>Goal 1 - Enhance and promote academic excellence.</p> <p>Goal 2 - Create and sustain an integrated and collaborative UMW student experience, blending curricular and co-curricular learning opportunities within a student-centered environment.</p> <p>Goal 3 - Promote and enhance a diverse and inclusive community.</p> <p>Goal 4 - Enhance, strengthen and promote the fine and performing arts, museums, libraries and other rich cultural resources of the University.</p>

Institution	University of Mary Washington, 2009-2014
	<p>Goal 5 - Create and sustain a strong sense of institutional community among UMW faculty and staff and provide the infrastructure to advance our mission, ensuring a productive and supportive University work environment.</p> <p>Goal 6 - Promote and enhance regional engagement, leadership and service to the public.</p> <p>Goal 7 - Demonstrate effective stewardship of existing resources and develop new revenue streams to support strategic plan initiatives.</p> <p>Goal 8 - Strengthen the image and identity of the University of Mary Washington and expand visibility and recognition of the institution.</p>
Objectives	Each goal includes two or more objectives associated with it.
Values	<ul style="list-style-type: none"> • UMW values an institutional culture of excellence achieved by individual and collaborative productivity, disciplinary and interdisciplinary achievements, diversity and inclusion and accountability for self, institution and the community beyond our campuses. • UMW values its long tradition of individual and collective honor and integrity, including our institutional Honor Code. • UMW values, supports and emphasizes varied and effective teaching and learning environments informed by pedagogical research, theory and best practices, in anticipation of a changing world. • UMW values and encourages service from students, faculty and staff. • UMW values the contributions and dedication of all the people who are part of the institution – our students, faculty, staff, alumni and friends of the University. • UMW values an institutional culture that promotes open, respectful communication and productive shared governance. • UMW, with its long tradition of individualized attention to students, values its legacy of providing an exceptional undergraduate liberal arts experience and its growing reputation for offering high quality graduate and professional study. • UMW values its commitment to identifying and meeting the ongoing and changing needs of the traditional and non-traditional student. • UMW values the opportunities, richness and excellence fostered by a diverse and inclusive environment. • UMW values the loyalty and appreciation our alumni feel for their alma mater and the commitment they show by staying connected to their Mary Washington classmates, their teachers and their institution. • UMW values its dynamic regional partnerships and its leadership role in serving as a cultural, economic and intellectual resource to the community.

Institution	University of Virginia: The Cornerstone Plan, 2013
Vision	Five years represent a short span in the life of an institution approaching its 200th anniversary, but all indications suggest that the next five years will be critical ones in the University's history. If the University is successful in establishing leadership as a core theme and implementing the initiatives described in the Cornerstone Plan, the University will emerge as a vital and energized institution, with a differentiating vision.
Mission	The University of Virginia is a public institution of higher learning guided by a founding vision of discovery, innovation and development of the full potential of talented students from all walks of life. It serves the Commonwealth of Virginia, the nation and the world by developing responsible citizen leaders and professionals; advancing, preserving and disseminating knowledge and providing world-class patient care.
Five Pillars	<ol style="list-style-type: none"> 1. Enrich and strengthen the University's distinctive residential culture. 2. Strengthen the University's capacity to advance knowledge and serve the Commonwealth of Virginia, the nation and the world through research, scholarship, creative arts and innovation. 3. Provide educational experiences that deliver new levels of student engagement. 4. Assemble and support a distinguishing faculty. 5. Steward the University's resources to promote academic excellence and affordable access.
Strategies	Each pillar has two or more strategies associated with it.

Institution	University of Virginia's College at Wise, Envisioning 2020 (2010)
Mission	The University of Virginia's College at Wise, a public liberal arts institution, provides students with learning experiences that offer opportunities to develop the insight, competence, sensitivity and integrity necessary for living enriched lives and for enriching the lives of others. Established in 1954 as a college of the University of Virginia, it is guided by the values of citizenship and altruism. Proud of its Appalachian heritage, the College continues to honor its commitment of service to Southwest Virginia, the nation and the world. The College is guided by a legacy of teaching and scholarly excellence and by a dedication to quality in both the arts and sciences and professional programs. Above all, The University of Virginia's College at Wise is a diverse community of people who believe that information can be transformed into knowledge and that teaching and learning create a foundation for wisdom.
Goals	<p>Goal 1 – Pursue and Achieve Academic Excellence as a Public Liberal Arts Institution.</p> <p>Goal 2 – Build a well-Qualified, Academically Motivated Diverse Student Body That Achieves Timely Graduation.</p> <p>Goal 3 – Enhance and Expand Meaningful Outreach and Service to the Community, Region and Nation.</p> <p>Goal 4 – Create and Maintain the Resources to Thrive as a Public Liberal Arts Institution Dedicated to Excellence.</p>
Strategies	Each goal has two or more strategies associated with it.

Institution	Virginia Commonwealth University
Vision	<p>VCU will be a premier urban, public research university distinguished by its commitment to:</p> <ul style="list-style-type: none"> • The intellectual and academic success of a diverse student body. • Research and discovery that advances knowledge, inspires creativity and improves human health. • The global engagement of students, faculty and staff that transforms lives and communities.

Institution	Virginia Commonwealth University
Mission	<p>As the premier urban, public research university in Virginia, VCU’s mission is to advance knowledge and student success through its commitments to:</p> <ul style="list-style-type: none"> • An engaged, learner-centered environment that fosters inquiry, discovery and innovation in a global setting. • Research that expands the boundaries of new knowledge and creative expression and promotes translational applications to improve human health. • Interdisciplinary collaborations that bring new perspectives to complex problems and mobilize creative energies that advance innovation and solve global challenges. • Health care that strives to preserve and restore health for all people, to seek the cause and cure of diseases through groundbreaking research and to educate those who serve humanity. • Diversity that provides a climate of inclusion, a dedication to addressing disparities wherever they exist and an opportunity to explore and create in an environment of trust. • Sustainable, university-community partnerships that enhance the educational, economic and cultural vitality of the communities VCU serves in Virginia and around the world.
Themes	<p>Become a leader among national research universities in providing all students with high-quality learning/living experiences focused on inquiry, discovery and innovation in a global environment.</p> <p>Attain pre-eminence as an urban, public research university by making contributions in research, scholarship, creative expression and clinical practice to advance knowledge and enhance the quality of life.</p> <p>Achieve national recognition as a fully-integrated research university with a commitment to human health.</p> <p>Become a national model for community engagement and regional impact.</p>
Goals	Each theme has three or more goals associated with it.

Institution	Virginia Commonwealth University
Values	<p>Accountability – committing to the efficient and transparent stewardship of our resources to achieve institutional excellence.</p> <p>Achievement – ensuring distinction in learning, research and scholarly pursuits, service and patient care.</p> <p>Collaboration – fostering collegiality and cooperation to advance learning, entrepreneurship and inquiry.</p> <p>Freedom – striving for intellectual truth with responsibility and civility, respecting the dignity of all individuals.</p> <p>Innovation – cultivating discovery, creativity, originality, inventiveness and talent.</p> <p>Service – engaging in the application of learning and discovery to improve the human condition and support the public good at home and abroad</p> <p>Diversity – ensuring a climate of trust, honesty and integrity where all people are valued and differences are recognized as an asset.</p> <p>Integrity – adhering to the highest standards of honesty, respect and professional and scholarly ethics.</p>

Institution	Virginia Military University, Vision 2039
Vision	To be the premier small college in the nation, unequalled in producing educated and honorable citizen-leaders, with an international reputation for academic excellence supported by a unique commitment to character development, self-discipline and physical challenge, conducted in a military environment.
Mission	Virginia Military Institute believes that the measure of a college lies in the quality and performance of its graduates and their contributions to society. Therefore, it is the mission of Virginia Military Institute to produce educated, honorable men and women, prepared for the varied work of civil life, imbued with love of learning, confident in the functions and attitudes of leadership, possessing a high sense of public service, advocates of the American Democracy and free enterprise system and ready as citizen-soldiers to defend their country in time of national peril.
Descriptors of Vision 2039	<p>I. A Military Institute and a Military Environment... Delivering a unique education</p> <p>II. Academic Reputation – The Premier Undergraduate College in America</p> <p>III. Renowned Honor System – #1 in the Nation</p> <p>IV. Partnerships with the Best USA Graduate Schools</p> <p>V. Balance of Arts, Sciences and Engineering with greater than 50% in hard science and engineering</p> <p>VI. Corps of 1500 with 150 to 200 Female Cadets</p>

Institution	Virginia Military University, Vision 2039
	<p>VII. Greater than 55% Virginia Cadets</p> <p>VIII. 70% Corps Commissioning (with growth in Guard and Reserve) “Citizen Soldiers”</p> <p>IX. Every Cadet an Athlete, Every Athlete a Cadet – Winning Sports Teams – the VMI way</p> <p>X. Leadership Development System – Program unsurpassed</p> <p>XI. Physical Plant – Beautiful, modern, technologically enhanced and historic</p> <p>XII. Organizationally streamlined, efficient and communicative</p> <p>XIII. Proud, Disciplined, Civil Cadets.....and Graduates</p> <p>XIV. One Cohesive Team – Alumni, Agencies, BOV, the Institute, Parents and Friends</p>

Institution	Virginia State University, 20/20 Vision Plan: The Long Range Plan
Mission	<p>Virginia State University, America’s first fully state supported four-year institution of higher learning for Blacks, is a comprehensive university and one of two land-grant institutions in the Commonwealth of Virginia.</p> <p>Its mission is to promote and sustain academic programs that integrate instruction, research and extension/public service in a design most responsive to the needs and endeavors of individuals and groups within its scope of influence. Ultimately, the University is dedicated to the promotion of knowledgeable, perceptive and humane citizens – secure in their self-awareness, equipped for personal fulfillment, sensitive to the needs and aspirations of others and committed to assuming productive roles in a challenging and ever-changing global society.</p>
Goals	<p>I. To become a SACS Level 6 institution</p> <p>II. To become a Carnegie Doctoral/Research Intensive University</p> <p>III. To move to the upper echelon of Tier 2 in the U.S. News & World Report rankings</p>
Values	<p>I. Our heritage as an HBCU with a land-grant mission</p> <p>II. The personalized attention we give to students in the delivery of instruction</p> <p>III. A holistic approach to student development</p> <p>IV. Providing a nurturing environment that supports the needs of students</p> <p>V. The constant pursuit of educational excellence</p>
Action Items	Action items are associated within nine committees.

Institution	Virginia Tech, A Plan For a New Horizon: Envisioning Virginia Tech 2012-2018
Challenges	The implications of global interdependence The needs and challenges of a data-driven society Meeting our research expectations Organizational efficiency and flexibility
Responding to Challenges	Research and innovation The life of the mind
Principle Strategies	Pursue quality-of-life initiatives in support of the university as a vibrant, dynamic and sustainable workplace with physical and cultural environments that promote life-long learning and mind/body wellness. Implement the Climate Action Commitment and Sustainability Plan as appropriate. Support the academic initiatives of the Inter-institutional Academic Collaborative of the Atlantic Coast Conference, recognizing the added value our successful athletics programs bring to the life of the campus.
Values	<i>Ut Prosim</i> (That I May Serve) is the essence of the Virginia Tech experience, the guiding principle of our community. The motto rests upon a foundation of trust, integrity, respect and compassion. We cannot serve without honoring diversity. We cannot be a vibrant community without promoting caring and inclusiveness, respecting individuality and valuing the unique contributions of each of our members.

Institution	Virginia Community College System: Achieve 2015
Vision	To contribute to the economic and civic vitality of the commonwealth and its international competitiveness, Virginia's Community Colleges commit to increasing access to affordable education and training for more individuals so they acquire the knowledge and skills to be successful in an ever-changing global economy.
Mission	We give everyone the opportunity to learn and develop the right skills so lives and communities are strengthened.
Goals	Access Affordability Student Success Workforce Resources

Institution	Northern Virginia Community College
Vision	The vision of NOVA is to be a learning-centered organization that promotes student success.
Mission	With commitment to the values of access, opportunity, student success and excellence, the mission of Northern Virginia Community College is to deliver world-class in-person and online post-secondary teaching, learning and workforce development to ensure our region and the Commonwealth of Virginia have an educated population and globally competitive workforce.
Goals	<ol style="list-style-type: none"> 1. STUDENT SUCCESS – Northern Virginia Community College will move into the top tier of community colleges with respect to the key indicators of student success. 2. ACCESS – Northern Virginia Community College will increase the number and diversity of students being served to mirror the population growth of the region. 3. TEACHING AND LEARNING – Northern Virginia Community College will focus on student success by creating an environment of world-class teaching and learning. 4. EXCELLENCE – Northern Virginia Community College will develop 10 focal points of excellence in its educational programs and services that will be benchmarked to the best in the nation and strategic to building the college’s overall reputation for quality. 5. LEADERSHIP – Northern Virginia Community College will serve as a catalyst and a leader in developing educational and economic opportunities for all Northern Virginians and in maintaining the quality of life and economic competitiveness of the region. 6. PARTNERSHIPS – Northern Virginia Community College will develop strategic partnerships to create gateways of opportunity and an integrated educational system for Northern Virginians who are pursuing the American Dream. 7. RESOURCES – Northern Virginia Community College will increase its annual funding by \$150 million and expand its physical facilities by more than one million square feet in new and renovated space. This includes the establishment of two additional campuses at epicenters of the region’s population growth as well as additional education and training facilities in or near established population centers. 8. EMERGENCY PREPAREDNESS AND CONTINUITY OF OPERATIONS – Northern Virginia Community College will be recognized as a leader among institutions of higher education in Virginia for its development and testing of emergency response and continuity of operation plans.

Institution	Tidewater Community College, 2013-2018 : One College - One Voice - One Future
Goals	<p>Student Success: Advancement to Successful Goal Achievement</p> <p>Innovation through Collaboration: One College—One Voice</p> <p>Internal Resource Development: Internal Reinvestment, Restructure and Building Community</p> <p>External Resource Development: Regional Alliance and Collaboration</p>
Objectives and Strategies	Each Goal has multiple objectives associated with it, and each objective has multiple strategies associated with it.

Appendix 3: Handout with Key Interview and Focus Group Questions

JBL ASSOCIATES, INC.

State Council of Higher Education for Virginia

Statewide Strategic Plan Development Project Key Stakeholder Interviews and Focus Groups

The Interview Team

Our team consists of professionals with extensive experience in strategic planning and a passion for higher education:

Donald M. Norris, Ph.D.



President and Founder of Strategic Initiatives, Inc. He has 40 years experience as a thought leader and expert practitioner in leading and navigating change, crafting and executing innovation and strategy, strategic marketing, and organizational transformation. His clients include hundreds of corporations, colleges and universities, professional societies and trade associations. He has published 20 books and monographs that continue to set the gold standard for transformative, strategic change.

and navigating change, crafting and executing innovation and strategy, strategic marketing, and organizational transformation. His clients include hundreds of corporations, colleges and universities, professional societies and trade associations. He has published 20 books and monographs that continue to set the gold standard for transformative, strategic change.

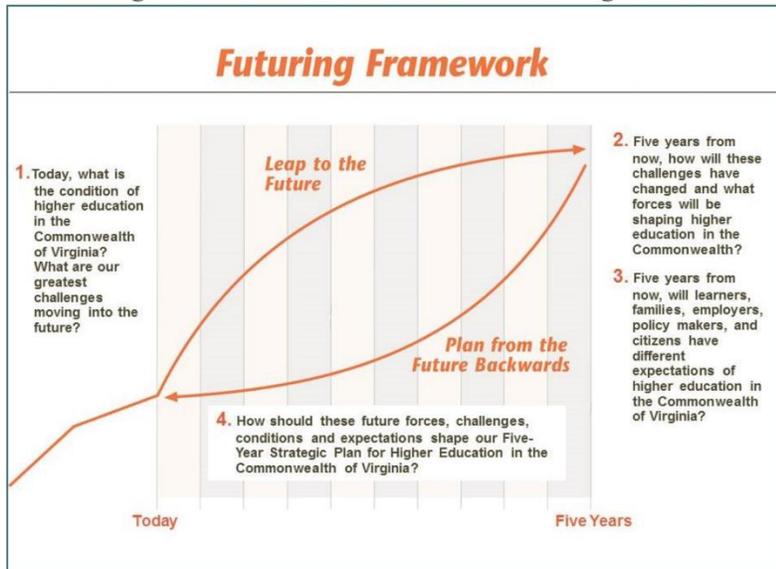
Stacia C. Aylward



Chief Executive Officer of Zelos. Ms. Aylward has extensive professional experience envisioning and managing programs and projects; conducting research to guide decision-making, planning and strategic goals; facilitating large and small group meetings and trainings with diverse audiences in the private and public sector; and creating strategic, communication and implementation plans for clients in many technical fields. She has worked with clients, including the City of Charlottesville, to produce plans that can be implemented quickly and communicated easily by facilitating simple, clear planning processes.

and projects; conducting research to guide decision-making, planning and strategic goals; facilitating large and small group meetings and trainings with diverse audiences in the private and public sector; and creating strategic, communication and implementation plans for clients in many technical fields. She has worked with clients, including the City of Charlottesville, to produce plans that can be implemented quickly and communicated easily by facilitating simple, clear planning processes.

Planning from the Future Backwards: The Futuring Framework



Thank you for your participation in the development of the next statewide strategic plan for higher education in Virginia. This strategic plan will be the culmination of an extensive process of research and outreach to key stakeholders throughout the Commonwealth. It will identify goals and priorities that can serve as a blueprint for institutional leaders and policy makers in their decision making processes, facilitate coordination among institutions, and suggest practices and policies that can be used to work toward those goals. We are excited to include your voice, perspective, and ideas in this process to frame a plan that will take higher education in the Commonwealth into the next decade.

Before we meet, we would like to give a sense of how our interviews and focus groups will proceed. Our lead facilitator will guide you, or your group, through a series of structured questions developed around the Futuring Framework, depicted above. These questions are designed to help us Plan from Future Backwards by first identifying where we want to be in the future and then figuring out how get there. Ultimately, it is our hope that, through this process, we will be able to elicit valuable insights from your unique perspective and incorporate them into a rich strategic plan for higher education in the Commonwealth.

Background Information

Some background information on higher education in Virginia is provided below:

Affordability: Percentage changes in state spending¹ indicators for the US and Virginia, academic years 2006-07 to 2011-12

	2006-07 to 2007-08 (% Change)		2007-08 to 2008-09 (% Change)		2008-09 to 2009-10 (% Change)		2009-10 to 2010-11 (% Change)		2010-11 to 2011-12 (% Change)	
	US	VA	US	VA	US	VA	US	VA	US	VA
State and local appropriations per student ²	4.0	2.7	-7.1	-8.1	-9.9	-18.8	-1.2	3.7	-4.5	-7.2
In-state tuition and fees ³	3.0	4.2	4.8	3.2	3.9	3.2	7.7	15.3	9.8	9.4
State and local grants per student ⁴	3.8	-12.5	8.3	6.9	-1.2	6.9	6.2	20.6	3.2	-1.0

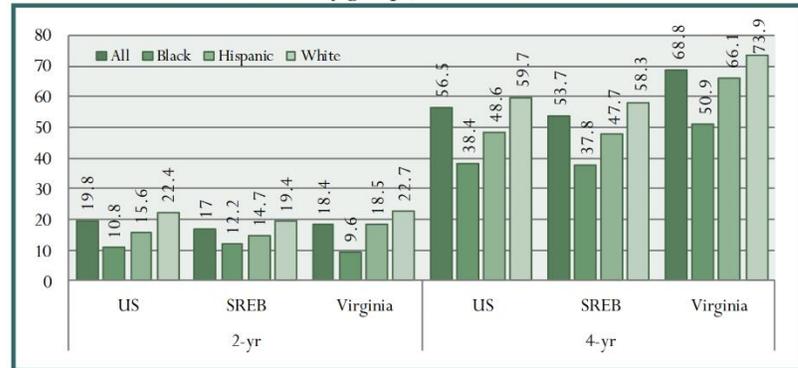
Source: US Department of Education, Integrated Postsecondary Education Data System (IPEDS) 2007-08 through 2012-13 collections, Institutional Characteristics, 12-Month Enrollment, Finance, and Student Financial Aid components.
<http://collegcost.ed.gov/statespending.aspx>

Accessibility: Percent Black or Hispanic among the college-age population and undergraduate enrollments in Virginia, 2006-2012

	Black, non-Hispanic			Hispanic		
	2006	2009	2012	2006	2009	2012
Population, age 15-24	16	16	16	9	10	11
Undergraduate Enrollments:						
Public, 2-yr	20	21	22	5	6	8
Public, 4-yr	16	16	15	4	4	6
Private, non-profit, 4-yr	23	22	19	3	3	4

Sources: State Council of Higher Education for Virginia, SCHEV Research, Table E22: Fall Headcount: Trends in Race Ethnicity, http://research.schev.edu/enrollment/E22_report.asp. U.S. Census Bureau, State and County Resident Population Estimates by Age, Sex, Race, and Hispanic Origin, <http://www.census.gov/popest/data/historical/2000s/index.html> and <http://www.census.gov/popest/data/historical/2010s/index.html>

Effectiveness: 150-percent-of-normal-time graduation rates⁵ in public 2-yr and 4-yr institutions for select race/ethnicity groups, 2011



Source: Southern Regional Education Board, http://info.sreb.org/DataLibrary/tables/FB13_45_46_47.xlsx

Interview Topics

During our conversation, some of the concepts we will likely discuss are:

What are the major challenges, opportunities and disruptive forces in your industry, occupation, or field of endeavor today?

How do you think higher education can help address the issues you identified?

What feature or characteristic of higher education in Virginia should be preserved, or changed, over the next ten years?

How does higher education in Virginia compare to other states or countries?

What is the most immediate issue facing higher education in Virginia today?

How well do you think higher education in Virginia adapts to its changing environment?

Please know that we will not share your individual responses with anyone and will never report any individual responses to these questions.

Notes:
 1 State spending indicators are for public institutions.
 2 State and local appropriations per full-time equivalent undergraduate student.
 3 In-district and in-state tuition and required fees for full-time, first-time undergraduate students weighted by the estimated number of in-district and in-state full-time, first-time undergraduate students, per in-state full-time, first-time undergraduate student.
 4 State and local government grants per in-district and in-state undergraduate student.
 5 The rates are based on the first-time, full-time, bachelor's-seeking students who enrolled in public four-year institutions and on the first-time, full-time, degree- or certificate-seeking students who enrolled in public two-year colleges in the fall term.

Appendix 4: List of Hosts for On-Site Regional Visits

Date	Region	Host Location
May 20, 2014	Central	Monticello High School
May 21, 2014	Central/ Eastern	SCHEV
May 22, 2014	Hampton Roads/ Eastern	Norfolk State University
May 23, 2014	Hampton Roads/ Eastern	Landstown High School
June 11, 2014	West Central	Roanoke Higher Education Center
June 12, 2014	Southwest	Wytheville Community College
June 13, 2014	South	Danville Institute for Advanced Learning and Research
June 30, 2014	Valley	Dabney S. Lancaster Community College
July 1, 2014	Valley	Virginia Military Institute
July 10, 2014	Northern	George Mason University
July 11, 2014	Northern	Northern Virginia Community College, Annandale Campus

Appendix 5: Ideas and Challenges Identified through Interviews and Focus Groups

Big Ideas for Change [Not Recommendations, but Rather Examples Expressed as Questions]

Access/Affordability/Success

1. How can we improve readiness for college and reduce the burden of remediation?
 - a. Push remediation/preparedness initiatives (and funding) to K-12? With assistance from community colleges?
 - b. Implement remediation programs that focus on just the particular competencies that students lack, not require a whole course of study? (These are already in existence at NOVA and elsewhere.)
 - c. Work with testing and assessment to better understand where students need remediation and where existing testing is misleading; build on work done at NOVA?
 - d. Give parents and high school students access to online examples of college-level work and tests so they can test their own readiness and competencies?
 - e. Push dual enrollment to expose more and more students to college-level work earlier; ramp up the seriousness of the last two years of high school? (Already underway in some places.)
 - f. Embed community college counselors in high schools and online, at scale? (Already in place in many locations, dependent on funding.)
2. How can we use STEM-H readiness and pathway interventions at key times in K-12 to prepare students for STEM-H subjects/careers and to attract more women and minorities? What is higher education's role in this? Who are other possible partners?
3. How can we utilize bridge/pathway programs and dual enrollments to improve baccalaureate completion rates and accelerate completion? (Baccalaureate in 3 years? Associate degree and high school diploma at same time? Baccalaureate/masters in 4-5 years?) How can these programs be achieved at scale?
4. How could we increase effective collaboration between K-12 and higher education to create an effective preK-20 pipeline? What staffing/ policy/ HR changes might it require?
5. Could our higher-demand institutions create and sustain "low-budget/ no-frills" institutions near their traditional campuses?
6. Could NOVA and GMU's pathways for educating underserved families be implemented at scale in regions across the Commonwealth? Could the improving of the culture of learning for Hispanics and other minorities be a major talking point for SCHEV, business leaders, college and university presidents and public intellectuals in the Commonwealth?

7. Improving access/affordability and student success will require better financial awareness by students, parents, counselors and policy makers. How could we increase awareness by leveraging various existing communication/engagement mechanisms? How could we raise “the price of education IQ” and clarify decision making?
8. How can we nurture degree completion programs for learners who are within 30 semester credit hours (SCH) of a baccalaureate degree, which could be a mechanism for raising Virginia’s degree count? A number of Virginia institutions are emphasizing this approach. Also, how can we count pre-associate degree certificates as a useful measure in order to focus needed attention on the lower end of the degree progression chain?
9. Many students graduate with 20-30 more credits than they need for a baccalaureate. How can we reduce the time to completion for students who currently take five years or more to graduate and/or who graduate with more credits than they need? Reduce credit hour requirements? Better advising and transfer articulation? Process improvement?
10. Should the strategic plan single out some groups for special attention (Veterans, people with disabilities, DREAMers)?
11. How can SCHEV leverage and improve its data systems to track and analyze the flow and progress of students from K-12 through community colleges and universities to completion, capturing the complexities of student progression and transfer patterns?

Excellence

12. How can we mobilize and collaborate with institutional leadership and other spokespersons to promote the continuing and future excellence of Virginia higher education?
13. How can support be mobilized for achieving competitiveness in academic salaries at Virginia universities? What multiple sources of funding could be utilized for this purpose?
14. There is great interest in providing research opportunities to undergraduate and graduate students at Virginia colleges and universities (discussion item from meeting of University Research Group). How can these opportunities be made available to students from institutions that do not have active research programs?
15. What are the best combinations of mechanisms for increasing the level of research funding and impact of research activity in the constellation of Virginia institutions? Public and private funding? Large-scale collaborations around topics like brain science to attract bigger awards and sponsors?
16. How can we support, encourage and enhance the resilience and responsiveness of Virginia institutions to changing conditions in academe, the global economy and the needs of Virginia? Nimble, agile, resilient in the face of dynamic change?

Sustainability

17. How can we realistically assess the state’s economic and financial prospects and provide for a dependable, consistent level of state funding for higher education that will

enable the Commonwealth to provide adequate education, training and continuing learning for its citizens in order to provide for continuing economic and social wellbeing? Realism and honesty about funding prospects is needed, not hopes and promises.

18. Can we assure adequate levels of funding so current performance-based funding policies can be implemented? Can we budget for institutions based on desired outcomes (research funding, workforce development, etc.) instead of allocating “equally?”
19. Could any or all of the components of William & Mary’s “The Promise” be applied to other institutions?
 - a. Raise tuition to closer to market levels
 - b. Increase proportion of out-of-state, full-pay students
 - c. Commit to stable tuition/fees over a four-year period for a cohort
 - d. Dramatically increase needs-based aid
 - e. Launch productivity/efficiency initiatives
20. How can we integrate the findings/recommendations of the JLARC Report into the Strategic Plan (particularly, elements dealing with productivity, efficiency and performance excellence).
21. What sorts of “shared services” could be used to improve performance/reduce costs at institutions?
22. Are there services (like payroll, financial aid, processing student loan apps) that could be centralized across the state, without centralization going too far?
23. Could we establish shared service centers at top-performing universities (in a variety of academic/administrative service areas and specialty services), get them to world-class levels of performance and then make those services available to other institutions at a low price? Could we have institutions be the providers, not state agencies? (Examples already exist in selected areas: NOVA, Tidewater CC, Tech)

Economic Growth and Vitality

24. How do we get academia and the business world on the same page, working together to meet the needs of both and speaking together to build support for education, training and workforce development as keys to economic growth and vitality?
25. How can we raise the understanding of the importance of the workforce of the 21st Century and the need to train and educate all levels of the workforce as factors that are critical to the Commonwealth’s economic wellbeing? Should this theme of Economic Growth and Vitality through Talent Development become an even more important talking point not just for UBED and Department of Commerce but for SCHEV, or others?

26. Is it necessary to focus attention on particular regional/urban clusters? For example, to fulfill its promise as a knowledge hub and the driving engine of Virginia's economy, some suggest that Northern Virginia needs to achieve several milestones, leveraging the existing base of George Mason University, NOVA and other institutions in the region:
- a. Establish a world-class center of excellence in cybersecurity and information technology in a league with Carnegie Mellon University;
 - b. Substantially increase the level of funded research;
 - c. Establish a medical school that could be part of a medical center/research center complex, attracting other medical enterprises; and
 - d. Dramatically increase entrepreneurship, commercialization and venture.
27. Should a focus on Hampton Roads/Tidewater come into play? For example, to build on the existing academic, research and medical enterprises in the Hampton Roads/Tidewater region, is it necessary to take collective action to bring the resources of the institutions together in closer collaboration, to include industry, government and other entities?
28. The VT/Carillion Research Institute in Roanoke completely changed the dynamic in the city and opened the door to exciting developments. Do we need to get out in front on these developments and support them in regions/urban centers across the Commonwealth?
29. Multi-party collaborations are important to Economic Growth and Vitality; how can the following examples (both existing and potential) be supported and leveraged?
- a. Commonwealth Center for Advanced Manufacturing (CCAM) – 4 universities and 18 companies
 - b. Commonwealth Center for Advanced Logistics (CCAL)
 - c. Virginia Biotech Health Research Corporation
 - d. How about a collaboration like Reach NC website – portal to access resources in research, equipment and graduates related to NC universities
30. Growing the level of funded research at Virginia universities is an important objective. How can the strategic plan provide incentives, support and/or leadership to forward that objective?
31. Entrepreneurial activities are on the rise at Tech, UVa, George Mason, VCU, other universities and most of the community colleges. The greatest energy and drive seems to be from the students, although many of the institutions are revamping their administrative and support structures as well. Some are forming venture funds and involving alumni in new roles. How can we accelerate and encourage the development of entrepreneurship, innovation and commercialization across the Commonwealth so

that it becomes a real movement, a co-curricular feature, of Virginia higher education?
How can we share these opportunities across institutional boundaries?

Broad Challenges and Barriers

1. Institutional distinctiveness and autonomy are perceived to have been key to Virginia's success. But autonomy can be harmful if leaders are allowed to make poor decisions on behalf of their institutions (because they do not know better). Autonomy can also be harmful if unified, concerted action is required to address changing conditions but some leaders balk.
2. Key leaders believe that Virginia higher education is at a juncture where it needs more effective coordination and active leadership in order to address the challenges of the Commonwealth and to establish strategic continuity moving forward. There are varied opinions on how to achieve this coordination.
3. Virginia's General Assembly is currently divided ideologically and there are strong opinions on particular issues relating to who should provide leadership for advancing the higher education strategy, tuition levels, needs-based financial aid, institutional capacity and effectiveness, acceptable levels of out-of-state students, institutional missions and more. Finding consensus around a comprehensive strategic plan for achieving access, affordability and success will be challenging.
4. Funding for public K-12 has been increasing while funding for higher education in Virginia has been declining over the past few years. The GA has a constitutional responsibility to support K-12 and finds it politically expedient to cut higher education rather than K-12 when there is a shortfall. Further, 70% of Virginians say they would support a tax increase to maintain the quality of K-12 while only 49% say the same for higher education.⁵ Thus, there is a "neediness" gap between K-12 and higher education.
5. Some leaders sense that the most excellent universities in the 21st Century may differ from the 20th Century definition of excellence. They wonder if even our best Virginia universities are well positioned to confront that challenge.

⁵ "What Virginians Are Saying About Education," VCU, Commonwealth Education Institute, results taken from - 2014 CEPI Commonwealth Education Poll. www.cepi.vecu.edu/publications/polls/

Appendix 6: Quotes from the Private Data Collection Instrument

Industry Challenges Section:

*“Technology is also having significant impact; **it is disrupting the current model for higher education**, just as technology is disrupting many segments of the economy.”*

“The 'teach to the test' approach to the SOLs in our public schools is putting our young people at a great disadvantage compared with some other states and with the rest of the educated world. Not the fault of the teachers, rather a result of well meaning, but misguided policy. Insufficient and incorrect to categorize today's students as lazy or dumb. They are every bit as intelligent as ever, but have not had to work to get through elementary or high school with passing or even good grades. The availability of information online makes it even more important that we teach students of all age groups how to think about information, analyze it and apply it.”

“Changing mission from educator to trainer.”

“Focus on STEM, however there aren't enough regional jobs in STEM fields... Another challenge is that accrediting bodies are becoming more demanding in their standards.”

“Too many people are being forced to do too much with too few resources.”

“Finding and maintaining talent. Our business has a greater need for technical skills - engineering, etc.”

Positive Changes Seen:

“A very positive change is SCHEV providing very valuable information about degrees and employment. This allows students to make informed decisions. Another positive change is the emphasis on student success.”

“I see no positive developments. We are in the final stages of an educational Vietnam.”

“A concerned public”

“An increased willingness for collaboration amongst public and private sectors, evaluating redundant processes to eliminate duplication of effort and recognition of industry differences that will make the system stronger as a whole.”

“Our company has a 5 year growth plan to increase the revenues of our facility thus creating jobs and opportunities to keep talent in the local area. Our company is partnering with the local public school system on STEM UP program.”

Three Future Forces:

“The rising cost of education is a concern because it will limit access. An educated workforce is a major requirement for economic expansion.”

“Employees with 'hard' skills are more difficult to find and retain - other industries and other states are offering more competitive salaries.”

“In public higher education, we are spending inordinate amounts on administration and student services. At my institution less than 30% of employees are teaching faculty.”

“With rising costs in education, increase [in] interest rates for student loans, fewer students are going to be attending 'traditional higher education’.”

“The industry must be able to change as the global market evolves. Constantly considering global competition is integral to ensuring long term viability.”

“Regulations around efficiency and outcomes take time and effort. The college staff are taken away from their ‘regular’ work to manage the amount of [data] needed to satisfy the many regulatory agencies (regional accreditation, national accreditation agencies, JLARC, SCHEV, Department of Education, etc.).”

“We have no idea what technology will really do to higher education.”

How can higher education help address those forces?

“Higher education plays a key role in providing that training and skills. Second, and perhaps most important, is that higher education in Virginia is positioned, through its research institutions, to be a leader in the evolution of technology and economic development. This is a crucial role to provide for the Commonwealth. Without it, Virginia will be left behind.”

“Sharing best practices and data, treating student's success as the responsibility of all VA institutions irrespective of where they start or end their education.”

“Higher education is a LONG-TERM investment. Current strategies that take a short-term instrumentalist approach will not help.”

Future trends:

“We should preserve the individuality of the higher education institutions. There is a troubling trend of great centralization and increased control by state entities. Educational institutions should be entrepreneurial in nature - let the institutions change when needed - let them decide what types of programs to pursue and the instructional formats to be used. Too much oversight stifles creativity.”

“A traditional liberal arts education should be preserved as an option - not an absolute. Focus on STEM initiatives is critical but not at the expense of the liberal arts.”

“Emphasis on high quality teaching, campus-based experience, robust academic and campus life, centered on fostering exceptional learning experience.”

“The integrated research, teaching and service mission it’s not a widget making machine, it’s a place where young people become responsible citizens and where responsible citizens become the State’s leaders.”

“Aid or assistance for all youth to obtain higher education. Build relationships with business and industry in local community to see what jobs and skills could be taught so when entering the job market, the candidates have the required skills to obtain employment.”

What should be avoided in the future?

“Virginia must avoid have a two class higher education system with selective institutions charging market rate putting the cost out of reach and limiting access for many Virginians.”

“The direction higher education should avoid is the status quo. There are too many faculty members who do not want to change the way they teach. There are too many administrators who are reluctant to try new things and to be flexible in content offerings. There are too many state rules, regulations and hoops to jump through when higher educational offerings are proposed. It takes too darn long to get things accomplished due to the red tape.”

“Specialty degrees that have a very narrow scope.”

“Mass production of degrees that lack quality.”

“Avoid privileging the privileged.”

Additional Comments:

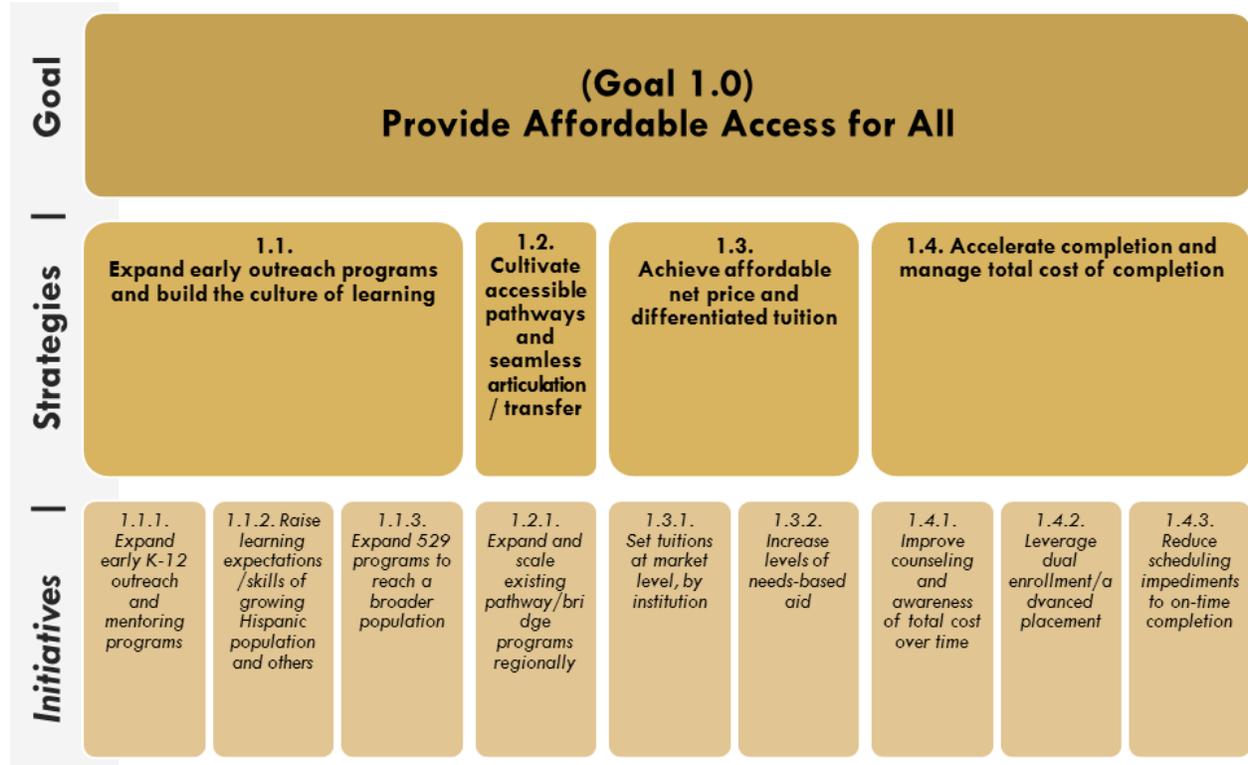
“Virginia needs to focus its available and future resources based on the needs and programs of its various institutions.”

“...there needs to be an avenue for colleges and universities to respond to market demands and implement some new ideas quickly. We do not know what the jobs of the future will entail, but we really should not be training students for jobs of the past.”

“We must start to see higher education as an important strategic investment for the long term, and as a key driver of economic growth and innovation.”

Appendix 7: Sample of How Initiatives Align with Strategies and Goals within the Framework

Below is a sample of how (starting at the bottom) Initiatives contribute to Strategies, which contribute to Goals, which contribute to the overall Mission and Vision. Only one goal is included here as an example of how the framework is inter-connected.



Appendix 8: Possible Areas for Measurement to Assess Progress toward Goals and Strategies

Examples of metrics that could be used at the strategy level. As the statewide plan measures are developed, targets for the measures may also be set.

Goals/Strategies	State/Regional Areas for Measurement	Institutional (K-12 and postsecondary education) Areas for Measurement
<i>Goal 1.0—Provide Affordable Access for All</i>		
Strategy 1.1. Expand early outreach programs and build the culture of learning	<p>S 1.1</p> <p>Number of outreach programs of different kinds</p> <p>Number of K-12 students participating in outreach programs</p>	<p>S 1.1</p> <p>Description of outreach programs</p> <p>Number of K-12 students participating in outreach programs</p>
Strategy 1.2. Cultivate accessible pathways and seamless articulation/transfer	<p>S1.2</p> <p>Number of bridge/pathway programs of various kinds</p> <p>Number of K-12 students participating in outreach programs</p>	<p>S1.2</p> <p>Number of bridge/pathway programs of various kinds</p> <p>Number of K-12 students participating in outreach programs</p>
Strategy 1.3. Achieve affordable net price and differentiated tuition	<p>S1.23</p> <p>Frequency distribution of tuition, fees, room/board among Virginia institutions</p> <p>Average and median tuition, fees, room/board</p> <p>Average/median net price</p> <p>Frequency distribution of loan debt for graduates in Virginia institutions, average loan debt for graduates</p> <p>Total needs-based aid expenditures, by source of funds</p> <p>Participation in 529 plans</p>	<p>S1.23</p> <p>Tuition, fees, room/board</p> <p>Average net price</p> <p>Actual loan debt for graduates</p> <p>Total needs-based aid budget and expenditures</p> <p>Sources of needs-based aid funds</p>
Strategy 1.4 Accelerate completion and manage the total cost of completion	<p>S1.4</p> <p>Availability of financial awareness counseling (K-12/CC)</p> <p>Average dual enrollment/AP/credit for prior learning</p> <p>Average SCH of graduates, by discipline</p>	<p>S1.4</p> <p>Availability of financial awareness counseling (K-12/CC)</p> <p>Average dual enrollment/AP/credit for prior learning</p> <p>Average SCH of graduates, by discipline</p>

Goals/Strategies	State/Regional Areas for Measurement	Institutional (K-12 and postsecondary education) Areas for Measurement
<i>Goal 2.0—Optimize Student Success</i>		
Strategy 2.1. Improve readiness; reduce need for remediation	<p>S 2.1</p> <p>% Students requiring remediation (HS, CC, College/University)</p> <p>Success % in remedial courses</p> <p>Average length of time to complete remedial courses</p> <p>% of students completing remedial courses who receive degree</p>	<p>S2.1</p> <p>% Students requiring remediation (HS, CC, College/University)</p> <p>Success % in remedial courses</p> <p>Average length of time to complete remedial courses</p> <p>% of students completing remedial courses who receive degree</p>
Strategy 2.2. Produce graduates who are prepared to live productive, meaningful lives	<p>S2.2</p> <p>Demonstrated critical thinking skills (CL:A tests)</p> <p>Employment of recent graduates (SCHJEV statistics)</p> <p>Salaries of graduates ten years after graduation, 20 years after</p>	<p>S2.2</p> <p>Demonstrated critical thinking skills (CL:A tests)</p> <p>Employment of recent graduates (SCHJEV statistics)</p> <p>Salaries of graduates 10 years after graduation, 20 years after</p>
Strategy 2.3. Improve certificate and degree completions and achieve targets for certificate/degree production	<p>S2.3</p> <p>Annual certificate/degree production by discipline and level - compared to TJ21 targets recalibrated to reflect certificates</p> <p>STEM-H certificate/degree production – subset of previous</p> <p>Freshmen to sophomore retention rate, first-time-in-college students</p> <p>Universities: 4-year and 6-year graduation rates</p> <p>Community Colleges– 2-year and 3-year graduation rates</p> <p>Graduation gaps between Caucasian, black, Hispanic , Asian students</p>	<p>S2.3</p> <p>Annual certificate/degree production by discipline and level</p> <p>STEM-H certificate/degree production (subset of previous metric)</p> <p>Freshmen to sophomore retention rate, first-time-in-college students</p> <p>Freshmen retention gap between Caucasian, black, Hispanic, Asian students</p> <p>Universities: 4-year and 6-year graduation rates</p> <p>Community Colleges– 2-year and 3-year graduation rates</p> <p>Graduation gaps between Caucasian, black, Hispanic , Asian students</p>
Strategy 2.4. Enhance degree completion and lifelong learning for adults	<p>S2.4</p> <p>Metrics Existence of degree completion programs</p> <p>Degrees achieved through degree completion programs</p>	<p>S2.4</p> <p>Existence of degree completion programs</p> <p>Degrees achieved through degree completion programs</p>

Goals/Strategies	State/Regional Areas for Measurement	Institutional (K-12 and postsecondary education) Areas for Measurement
<i>Goal 3.0—Achieve Sustainable Excellence</i>		
<p>Strategy 3.1. Continue to invest in the abiding elements of Virginia postsecondary education excellence</p>	<p>S3.1</p> <p>Comparison of current state appropriation with formula recommendation (total for state)</p> <p>Aggregated faculty salary competitiveness, Virginia public institutions</p> <p>Sponsored research \$, all sources</p> <p>Sponsored research \$, federal sources</p> <p>Relative ranking of research expenditure</p>	<p>S3.1</p> <p>Comparison of current state appropriation with state formula recommendation</p> <p>Salary comparisons of faculty in peer disciplines, by discipline</p> <p>Sponsored research \$, all sources</p> <p>Sponsored research \$, federal sources</p> <p>Relative ranking of research expenditures</p>
<p>Strategy 3.2. Invest in Activities Critical to Future Competitiveness</p>	<p>S3.2</p> <p>IT expenditures as % institutional expenditures</p> <p>Level of institutional engagement in online and hybrid learning</p> <p>Level of institutional engagement in entrepreneurship, innovation, commercialization</p> <p>Demonstrable outcomes from entrepreneurship, innovation, commercialization</p> <p>Level of innovative partnerships</p>	<p>S3.2</p> <p>IT expenditures as % of institutional expenditures</p> <p>Level of institutional engagement in online and hybrid learning</p> <p>Level of institutional engagement in entrepreneurship, innovation, commercialization</p> <p>Demonstrable outcomes from entrepreneurship, innovation, commercialization</p> <p>Level of innovative partnerships</p>
<p>Strategy 3.3. Commit to greater resilience, responsiveness, and productivity in Virginia postsecondary education</p>	<p>S3.3</p> <p>Description of institutional productivity/performance enhancement programs</p> <p>Demonstrable outcomes from institutional productivity/performance improvement programs</p> <p>Description of institutional cost reduction/realignment programs</p> <p>Demonstrable outcomes from institutional cost reduction/alignment programs</p>	<p>S3.3</p> <p>Description of institutional productivity/performance enhancement programs</p> <p>Demonstrable outcomes from institutional productivity/performance improvement programs</p> <p>Description of institutional cost reduction/realignment programs</p> <p>Demonstrable outcomes from institutional cost reduction/alignment programs</p>

Goals/Strategies	State/Regional Areas for Measurement	Institutional (K-12 and postsecondary education) Areas for Measurement
<i>Goal 4.0—Advance the Economic Prosperity of the Commonwealth</i>		
<p>Strategy 4.1. Build a competitive, well-educated and trained workforce at all levels</p>	<p>S4.1</p> <p>Align institutional curriculum and certificates/degrees with recalibrated TJ21 goals</p> <p>Adequacy of linkages with jobs/career based advising</p> <p>Identification of gaps in needs-based aid</p>	<p>S4.1</p> <p>Align institutional curriculum and certificates/degrees with recalibrated TJ21 goals</p> <p>Adequacy of linkages with jobs/career based advising</p> <p>Identification of gaps in needs-based aid</p>
<p>Strategy 4.2. Provide for the economic development for communities and regions of the Commonwealth</p>	<p>S4.2</p> <p>Assessment of aggregated Economic Development efforts and partnerships</p> <p>Assessment of special Regional differentiation, needs, assets, and gaps</p>	<p>S4.2</p> <p>Assessment of Institutional Economic Development efforts and partnerships</p>
<p>Strategy 4.3. Support research that creates new knowledge and leads to commercialization of new products and ventures</p>	<p>S4.3</p> <p>Existence of and participation in research centers of excellence</p> <p>Opportunity for students to work on undergraduate research, number participating</p> <p>Opportunity to participate in regional/state-wide research collaboratives</p>	<p>S4.3</p> <p>Existence of and participation in research centers of excellence</p> <p>Opportunity for students to work on undergraduate research, number participating</p> <p>Opportunity to participate in regional/state-wide research collaboratives</p>
<p>Strategy 4.4. Encourage and expand public service that meets the needs of the Virginia economy</p>	<p>S4.4</p> <p>Levels of public service of all kinds</p> <p>Existence of and demonstrable outcomes from business development incubators</p> <p>Initiatives to refine and advance entrepreneurship, intellectual property, commercialization</p> <p>Outcomes from commercializable activities/ventures</p>	<p>S4.4</p> <p>Levels of public service</p> <p>Existence of and demonstrable outcomes from business development incubators</p> <p>Initiatives to refine and advance entrepreneurship, intellectual property, commercialization</p> <p>Outcomes from commercializable activities/ventures</p>

Goals/Strategies	State/Regional Areas for Measurement	Institutional (K-12 and postsecondary education) Areas for Measurement
<i>Goal 5.0—Frame a Compelling Narrative for Higher Education</i>		
5.1. Mobilize key leadership to proclaim the need for public support of Virginia postsecondary education	<p>S5.1</p> <p>Collaborations between SCHEV and institutional leadership (BoV and presidents)</p> <p>Collaborations between SCHEV and other stakeholders (Executive branch, General Assembly)</p>	<p>S5.1</p> <p>Collaborations between SCHEV and leadership at individual institution (BoV and presidents)</p>
Strategy 5.2. Develop a communication plan around the persuasive compelling narrative	<p>S5.2</p> <p>Existence of strong, compelling narrative</p> <p>Existence of highly professional communication plan</p>	<p>S5.2</p> <p>[TBD in the communication plan]</p>
Strategy 5.3. Utilize multiple channels to engage stakeholders	<p>S5.3</p> <p>Measurement and scatter diagram of type and frequency of engagement of stakeholders</p> <p>Survey research to determine effectiveness of engagement in changing the opinions of stakeholders on the importance of public investment in higher education</p>	<p>S5.3</p> <p>[TBD in the communication plan]</p>