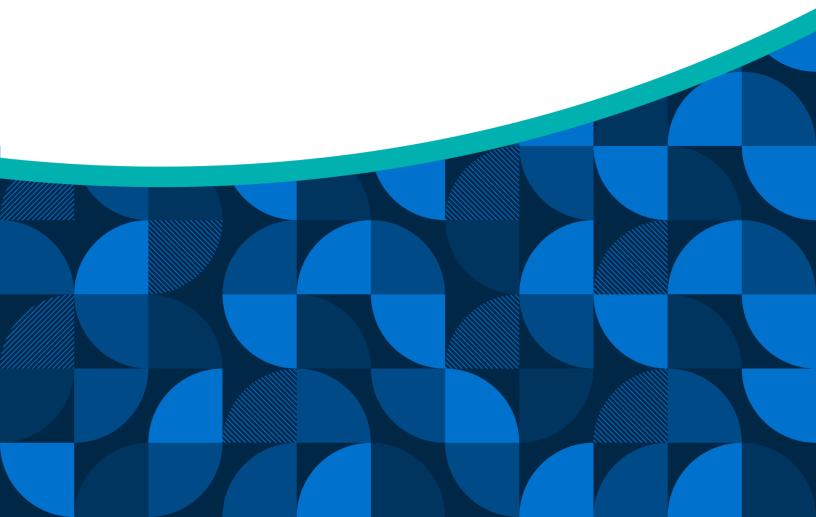


STRATEGIC ADVISORY SERVICES

# Modern Anchor Institution Investment Prioritization Toolkit

Three Tools to Pinpoint Best-Bet Opportunities for Strategic Investments



#### How to Use This Toolkit

Colleges and universities are facing heightened pressure around relevance and accountability, and all signs suggest key external stakeholders—starting with more value-conscious students and families and extending to employers, legislators, and donors—will push even harder on outcomes going forward. Yet, most institutions' strategies remain inwardly-focused on more traditional, self-serving priorities, and their efforts to demonstrate value externally fail to resonate with key constituencies. Going forward, institutions must instead embrace a more "outside-in" approach, aligning their institution's investments with key priorities that external constituencies value.

This toolkit provides a decision-making framework for cabinet leadership teams to prioritize strategic investments based on their current performance as a modern anchor institution, their local community's specific needs, and their external constituencies' evolving expectations.

Campus leaders should use each tool to gather relevant information, reflect on needs and priorities, and critically assess where to focus their efforts. While each tool can be deployed on its own, leadership teams can maximize the value of this toolkit by identifying areas of overlap across the three tools. Those areas of overlap are the best-bet opportunities for strategic investment since they will strengthen the institution's performance in areas that are relevant to both the local community and key external constituencies.

#### Modern Anchor Institution Investment Prioritization Toolkit



Tool 1

#### Modern Anchor Institution Maturity Diagnostic (See page 3)

Use this diagnostic tool to evaluate your institution's current performance across four key activity and impact areas.



#### **Expedited Community Needs Pulse Check (See page 10)**

Use this guide to quickly identify urgent and/or unmet needs in the local community that your institution could potentially address.

Tool 3

#### External Perspective-Taking Worksheet (See page 14)

Use this worksheet to gather intel about key external constituencies' perspectives and priorities.

**Synthesize findings across the three tools** to pinpoint best-bet opportunities for strategic investments.



# Modern Anchor Institution Maturity Diagnostic

Evaluate Your Institution's Current Performance Across Four Key Activity and Impact Areas

TOOL



## **Modern Anchor Institution Maturity Diagnostic**

Evaluate Your Current Performance Across Four Key Activity and Impact Areas

The purpose of this tool is to help campus leadership teams assess their current efforts and performance as a modern anchor institution in four investment areas:

Ι

#### Build the College-Going Pipeline Through Upstream Interventions

Take responsibility for providing wraparound K-12 support and flexible re-entry pathways to improve student readiness and college-going rates along with community educational attainment

TΤ

#### Reshape the Academic Experience to Better Deliver on Social Mobility

Adapt the curriculum and co-curriculum to bolster students' post-graduation outcomes, the institution's value proposition, and local employers and regional industries

TTT

#### Drive Real-World Impact by Scaling Community-Centric Research

Embrace a practical, solution-focused research model that attracts funding and demonstrates relevance by addressing unmet community and industry needs IV

#### Catalyze Mutually Beneficial Economic Development

Scale public-private partnerships and directly invest in off-campus community development to boost enrollment, donation, and career prospects along with overall quality of life

#### Instructions

In most cases, cabinet leadership teams should collaborate to complete this diagnostic since they collectively have visibility across different campus units and initiatives. However, leaders can and should consult colleagues in relevant areas (e.g., industry partnerships, research, economic development) to supplement or gut-check their responses, as needed.



Each investment area contains a series of four questions in dark blue boxes. There are several action statements below each question that are assigned a number of points (1-3) based on the progressiveness of the practice and the effort required to implement the practice.

For each action statement:

- If the statement accurately reflects current practice at your institution, record the full number of points assigned to that action statement in the far right column.
- If the statement does not apply or reflect current practice at your institution, record a score of 0 points in the far right column.
- Total your points at the end of each page. The maximum number of points per investment area is 24.
- At the end of the diagnostic, record your total points for each investment area and use the provided template to rank the four areas from lowest priority to top priority.





# Build the College-Going Pipeline Through Upstream Interventions

Creates formalized, long-term partnerships (e.g., university-assisted community schools) with a handful of local schools to transform them into support hubs that offer after-hours, non-academic, and community services.  Offers programming for parents that extends beyond financial preparation for college or FAFSA workshops. For example, educational opportunities focused on supporting academic achievement or parenting strategies.  Provides support for K-12 students that goes beyond college application guidance and academic assistance. For example, socio-emotional readiness programs or mental health and well-being resources.  Does your institution continuously build affinity with local students and families?  Hosts a multi-year cohort program for local students that starts in middle school and provides a sequenced curriculum oriented around academic and socioemotional readiness along with career exploration.  Facilitates K-12 workshops or programs (e.g. STEM exploration days) on campus that leverage the university's distinct expertise, facilities, and technology to bolster readiness in ways K-12 schools could not on their own.  Engages local K-12 students during the summer through opt-in day camps and during the school year via campus tours or visits.  Does your institution have seamless dual enrollment pathways that bridge K-12, 2-year, and 4-year schools?  Offers career-specific dual enrollment 'tracks' that provide a clear pathway towards a major in a high-demand field (e.g., nursing).  Provides financial and logistical (e.g., transportation) support to broaden access to dual enrollment courses.  Does your institution offer sub-baccalaureate programs and pathways that entice students who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high sch		<u>Points</u>	Your Score
community schools) with a handful of local schools to transform them into support hubs that offer after-hours, non-academic, and community services.  Offers programming for parents that extends beyond financial preparation for college or FAFSA workshops. For example, educational opportunities focused on supporting academic achievement or parenting strategies.  Provides support for K-12 students that goes beyond college application guidance and academic assistance. For example, socio-emotional readiness programs or mental health and well-being resources.  Does your institution continuously build affinity with local students and families?  Hosts a multi-year cohort program for local students that starts in middle school and provides a sequenced curriculum oriented around academic and socioemotional readiness along with career exploration.  Facilitates K-12 workshops or programs (e.g. STEM exploration days) on campus that leverage the university's distinct expertise, facilities, and technology to bolster readiness in ways K-12 schools could not on their own.  Engages local K-12 students during the summer through opt-in day camps and during the school year via campus tours or visits.  Does your institution have seamless dual enrollment pathways that bridge K-12, 2-year, and 4-year schools?  Offers career-specific dual enrollment 'tracks' that provide a clear pathway two are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunit	Does your institution provide wraparound K-12 supports that extend beyond the	he classroom?	
college or FAFSA workshops. For example, educational opportunities focused on supporting academic achievement or parenting strategies.  Provides support for K-12 students that goes beyond college application guidance and academic assistance. For example, socio-emotional readiness programs or mental health and well-being resources.  Does your institution continuously build affinity with local students and families?  Hosts a multi-year cohort program for local students that starts in middle school and provides a sequenced curriculum oriented around academic and socioemotional readiness along with career exploration.  Facilitates K-12 workshops or programs (e.g. STEM exploration days) on campus that leverage the university's distinct expertise, facilities, and technology to bolster readiness in ways K-12 schools could not on their own.  Engages local K-12 students during the summer through opt-in day camps and during the school year via campus tours or visits.  Does your institution have seamless dual enrollment pathways that bridge K-12, 2-year, and 4-year schools?  Offers career-specific dual enrollment 'tracks' that provide a clear pathway towards a major in a high-demand field (e.g., nursing).  Provides financial and logistical (e.g., transportation) support to broaden access 2 points  to dual enrollment courses.  Does your institution offer sub-baccalaureate programs and pathways that entice students who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  Creates guaranteed transfer pathways for local community college students.  1 point	community schools) with a handful of local schools to transform them into	3 points	
guidance and academic assistance. For example, socio-emotional readiness programs or mental health and well-being resources.  Does your institution continuously build affinity with local students and families?  Hosts a multi-year cohort program for local students that starts in middle school and provides a sequenced curriculum oriented around academic and socioemotional readiness along with career exploration.  Facilitates K-12 workshops or programs (e.g. STEM exploration days) on campus that leverage the university's distinct expertise, facilities, and technology to bolster readiness in ways K-12 schools could not on their own.  Engages local K-12 students during the summer through opt-in day camps and during the school year via campus tours or visits.  Does your institution have seamless dual enrollment pathways that bridge K-12, 2-year, and 4-year schools?  Offers career-specific dual enrollment 'tracks' that provide a clear pathway towards a major in a high-demand field (e.g., nursing).  Provides financial and logistical (e.g., transportation) support to broaden access to dual enrollment courses.  Does your institution offer sub-baccalaureate programs and pathways that entice students who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  Creates guaranteed transfer pathways for local community college students.  1 point	college or FAFSA workshops. For example, educational opportunities focused on	2 points	
Hosts a multi-year cohort program for local students that starts in middle school and provides a sequenced curriculum oriented around academic and socioemotional readiness along with career exploration.  Facilitates K-12 workshops or programs (e.g. STEM exploration days) on campus that leverage the university's distinct expertise, facilities, and technology to bolster readiness in ways K-12 schools could not on their own.  Engages local K-12 students during the summer through opt-in day camps and during the school year via campus tours or visits.  Does your institution have seamless dual enrollment pathways that bridge K-12, 2-year, and 4-year schools?  Offers career-specific dual enrollment 'tracks' that provide a clear pathway towards a major in a high-demand field (e.g., nursing).  Provides financial and logistical (e.g., transportation) support to broaden access to dual enrollment courses.  Does your institution offer sub-baccalaureate programs and pathways that entice students who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  1 points  Creates guaranteed transfer pathways for local community college students.  1 point	guidance and academic assistance. For example, socio-emotional readiness	2 points	
school and provides a sequenced curriculum oriented around academic and socioemotional readiness along with career exploration.  Facilitates K-12 workshops or programs (e.g. STEM exploration days) on campus that leverage the university's distinct expertise, facilities, and technology to bolster readiness in ways K-12 schools could not on their own.  Engages local K-12 students during the summer through opt-in day camps and during the school year via campus tours or visits.  Does your institution have seamless dual enrollment pathways that bridge K-12, 2-year, and 4-year schools?  Offers career-specific dual enrollment 'tracks' that provide a clear pathway towards a major in a high-demand field (e.g., nursing).  Provides financial and logistical (e.g., transportation) support to broaden access to dual enrollment courses.  Does your institution offer sub-baccalaureate programs and pathways that entice students who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  1 point	Does your institution continuously build affinity with local students and fan	nilies?	
campus that leverage the university's distinct expertise, facilities, and technology to bolster readiness in ways K-12 schools could not on their own.  Engages local K-12 students during the summer through opt-in day camps and during the school year via campus tours or visits.  Does your institution have seamless dual enrollment pathways that bridge K-12, 2-year, and 4-year schools?  Offers career-specific dual enrollment 'tracks' that provide a clear pathway towards a major in a high-demand field (e.g., nursing).  Provides financial and logistical (e.g., transportation) support to broaden access to dual enrollment courses.  Does your institution offer sub-baccalaureate programs and pathways that entice students who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  2 points  Creates guaranteed transfer pathways for local community college students.  1 point	school and provides a sequenced curriculum oriented around academic and	3 points	
Does your institution have seamless dual enrollment pathways that bridge K-12, 2-year, and 4-year schools?  Offers career-specific dual enrollment 'tracks' that provide a clear pathway towards a major in a high-demand field (e.g., nursing).  Provides financial and logistical (e.g., transportation) support to broaden access to dual enrollment courses.  Does your institution offer sub-baccalaureate programs and pathways that entice students who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  1 points  Creates guaranteed transfer pathways for local community college students.  1 point	campus that leverage the university's distinct expertise, facilities, and	2 points	
Offers career-specific dual enrollment 'tracks' that provide a clear pathway towards a major in a high-demand field (e.g., nursing).  Provides financial and logistical (e.g., transportation) support to broaden access to dual enrollment courses.  Does your institution offer sub-baccalaureate programs and pathways that entice students who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  1 points  Creates guaranteed transfer pathways for local community college students.  1 point		1 point	
Provides financial and logistical (e.g., transportation) support to broaden access to dual enrollment courses.  Does your institution offer sub-baccalaureate programs and pathways that entice students who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  2 points  2 points  Creates guaranteed transfer pathways for local community college students.  1 point		12, 2-year,	
Does your institution <b>offer sub-baccal aureate programs</b> and pathways that entice students who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  2 points  Creates guaranteed transfer pathways for local community college students.  1 point		3 points	
Who are not interested in or not yet eligible for a bachelor's degree?  Collaborates with local employers to create low-cost, short credential programs (4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  2 points  Creates guaranteed transfer pathways for local community college students.  1 point		2 points	
(4-8 months) in areas of high workforce demand that can lead directly to job opportunities and stack towards a bachelor's degree.  Allows students who did not graduate from high school to complete their diploma while earning college credits on campus.  2 points  Creates guaranteed transfer pathways for local community college students.  1 point		tice students	
diploma while earning college credits on campus.  Creates guaranteed transfer pathways for local community college students.  1 point	(4-8 months) in areas of high workforce demand that can lead directly to job	3 points	
		2 points	
Total Points 24 points	Creates guaranteed transfer pathways for local community college students.	1 point	
	Total Points	24 points	



# Reshape the Academic Experience to Better Deliver on Social Mobility

	<u>Points</u>	Your Score
Can students at your institution clearly articulate the skills they have acquire	<b>ed</b> to employers?	
Provides experiential major maps (i.e., visual pathways that help students sequence academic and co-curricular activities) for <u>all</u> majors.	3 points	
Helps faculty map their existing coursework to skills and competencies then incorporate those into their course syllabi.	2 points	
Facilitates reflection exercises before, during, and after co-curricular experiences (e.g., internships) that require students to identify and communicate their value in a relevant way.	1 points	
Provides student-facing course reflection tools (e.g., co-curricular transcript, e-portfolio, badges) that help students understand and showcase competencies.	1 point	
Does your institution <b>require all students to complete hands-on learning</b> eit through internships and co-ops or virtually through easy-to-use job platforms?	her in-person	
Provides applied learning opportunities like internships or co-ops for <u>all</u> students via employer partnerships, alumni connections, or on-campus jobs.	3 points	
Includes applied learning as a graduation requirement for <u>all</u> students.	2 points	
Offers flexible options for fulfilling applied learning requirements such as virtual internships or job simulations through platforms like <i>Forage</i> .	2 points	
Does your institution adjust bachelor's-level program offerings to <b>quickly respon employer needs</b> ?	nd to local	
Co-develops bachelor's degree programs alongside local employers.	3 points	
Conducts regular (at least once a year) program health checks to pinpoint opportunities to strengthen alignment with student and employer demand.	2 points	
Does your institution (beyond the professional and adult education unit) work w colleges and local community organizations on integrated workforce develop		
Co-develops industry-specific training and/or programs (e.g., certificates) based on regional and local employer needs.	3 points	
Participates in a consortium that offers streamlined access to training and credentials, networking, and job readiness support for local workers.	2 point	
Total Points	24 points	



# Drive Real-World Impact by Scaling Community-Centric Research

	<u>Points</u>	Your Score
Does your institution provide <b>trainings and incentives that encourage facult</b> the local community and industry?	<b>y</b> to work with	
Recognizes and rewards non-traditional scholarship formats along with more applied and/or community-centric work (e.g., research that supports policy development) in P&T requirements.	3 points	
Offers a faculty externship program that provides structured support and financial incentives for faculty to directly work at a local employer.	3 points	
Facilitates industry connections between faculty and regional companies via organized tours and events.	1 points	
Does your institution's doctoral education model enable research or projects voutside of academia?	with organizatio	ns
Offers a redesigned PhD program that embeds industry-funded and/or applied research into the curriculum.	3 points	
Facilitates Ph.Dlevel internships and/or project-based opportunities with local community or industry organizations.	2 points	
Has your institution prioritized <b>1-2 distinct areas of research expertise that</b> a <b>industries</b> in your region?	align with key	
Creates defined partnerships with and receives ongoing funding and/or infrastructure from at least three regional industry partners.	3 points	
Promotes key industries or companies that the institution supports via applied research in marketing materials and/or on the institutional website.	1 point	
Does your institution efficiently diagnose and respond to unmet community	or industry need	is?
Has an Office of Community Engagement and/or Industry Partnerships with a "front door" where external stakeholders can easily understand options for partnering across areas like research, advancement, or continuing education.	3 points	
Conducts robust community needs assessments that are presented to the cabinet and used to inform institutional investments.	3 points	
Encourages and recognizes institutional leaders, staff, and/or faculty who regularly participate in community and neighborhood board meetings.	2 points	
Total Points	24 points	





# Catalyze Mutually Beneficial Economic Development

	<u>Points</u>	Your Score
Has your institution <b>convened other local anchor institutions</b> (e.g., hospital, colleges) to develop a coordinated strategy?	2-year	
Creates and/or participates in a Community Development Corporation (CDC).	3 points	
Establishes formalized, non-CDC partnerships with other local anchors.	2 points	
Does your institution have a structure or process that enables <b>funding diversific</b> scaled investments?	cation and	
Taps into multiple types of external funding sources (e.g., federal new market tax credits, employer matching) to enable economic development investments.	3 points	
Works with local employers to develop and/or offer a credentialing program for their employees.	2 points	
Has a compelling pitch that clearly explains why external funders (e.g., donors, employers) should invest in the particular community and/or area.	1 point	
Does your institution <b>directly invest in services for local community membe</b> traditional infrastructural projects?	ers alongside	
Delivers high-demand community services via mobile or permanent spaces (e.g., mobile health clinic, subsidized childcare support).	3 points	
Facilitates recurring civic engagement and/or financial literacy events for community members (e.g., voter registration, financial services).	1 points	
Does your institution <b>actively deploy tactics</b> to retain students in the city, state after graduation?	e, and/or region	
Embeds 'local' learning in the student experience (e.g., general education requirement focused on geographically relevant issues, community-based capstone project).	3 points	
Offers internships and/or co-op placements at <u>local</u> organizations that routinely hire students as FTEs after graduation.	2 points	
Engages local alumni in regional recruitment and advocacy efforts (e.g., region-specific mentorship program, employer ambassador program).	2 points	
Proactively informs students about regional quality of life highlights (e.g., first-time home buyer state loan program).	1 point	
Hosts career fairs and/or networking events featuring local employers.	1 point	
Total Points	24 points	



# Totaling Your Scores and Identifying Next Steps

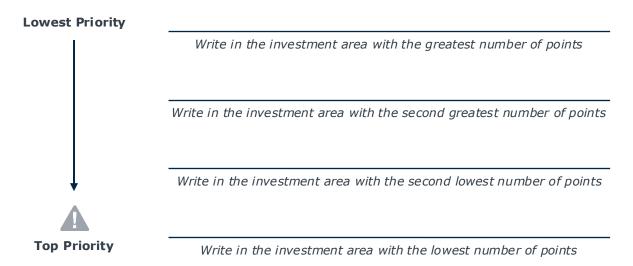
Step 1

In the table below, write in your total points (out of 24) for each investment area:

Investment Area	Total Points
1: Build the College-Going Pipeline Through Upstream Interventions	
2: Reshape the Academic Experience to Better Deliver on Social Mobility	
3: Drive Real-World Impact by Scaling Community-Centric Research	
4: Catalyze Mutually Beneficial Economic Development	

Step 2

**Use the template below to rank the four investment areas from lowest to highest priority.** The greater the points in an investment area, the stronger the institution's current performance. There is therefore less urgency to focus additional time and resources in these areas. In contrast, the fewer the points, the weaker the institution's current performance. As a result, these are higher priority areas for additional time and investment.



Step 3

Now that you have determined your institution's maturity across four key activity and investment areas, use Tools 2 and 3 to assess which of these areas will be most impactful for your local community and key external constituencies.

A list of associated EAB resources in each investment area is also provided on page 24.



# **Expedited Community Needs Pulse Check**

Conduct a Quick Assessment of Urgent and/or Unmet Needs in the Local Community

TOOL

2



## **Expedited Community Needs Pulse Check**

Quickly Diagnose Urgent and/or Unmet Needs in the Local Community

The purpose of this tool is to help campus leadership teams diagnose community needs that their institution could potentially help address.

One of the most common ways to do so is through a Community Needs Assessment (CNA), which is a comprehensive exercise that results in a formal report on community needs, resources, concerns, and gaps. **EAB** has a step-by-step guide to help institutions interested in conducting a full-scale CNA, which can be accessed here.

While all institutions should consider conducting a comprehensive CNA every few years, doing so can admittedly be time-consuming and expensive. Given current budget constraints and the urgency for institutions to adapt their strategy to drive greater impact, institutions may need to find ways to more quickly and regularly diagnose local community needs, especially when they are between comprehensive CNAs.

This tool provides one avenue for doing so: using quicker and more informal pulse checks of key internal and external leaders who have unique insight into community needs and priorities.

#### Instructions

Institutions that have recently completed a comprehensive CNA should review the findings and pinpoint the top 3-5 urgent and/or unmet community needs. They should then proceed to Tool 3 (page 18).

Institutions that have not recently completed a comprehensive CNA should use this tool to get a quick pulse check on community needs. This pulse check is best completed by a campus leader or deputy with community relations and/or partnerships experience. The results should then be shared with the cabinet leadership team. When conducting the pulse-check, consider using multiple channels (e.g., email, inperson meetings, phone conversations, digital forms) to gather information.

- Identify and collect information from internal administrators and/or staff who work closely with key community groups or stakeholders. See page 12 for suggested participants and questions.
- Identify and collect information from external community members who represent key constituencies and/or have unique insight into local needs. See page 15 for suggested participants and questions.
- 3 Synthesize and analyze information gleaned from both internal and external leaders, pinpointing the top 3-5 most urgent and/or unmet community needs that the institution could potentially address.



## **Internal Intel Gathering**

#### Gather Input From Internal Leaders With Knowledge About Community Needs

Below is a list of recommended internal leaders to consult, each of whom is likely to possess valuable intel about current community needs and partnerships. Use the sample questions on this page to guide your intel gathering and the space on pages 13 and 14 to document your findings. If your institution does not currently have one or more of these roles, consider substituting alternative internal leaders in roles that work with the same community population (e.g., a Dean of the College of Education instead of a Director of K-12 Outreach).



#### **Director of Community Engagement**

#### Sample Questions

- What issues or priorities have community members voiced in recent interactions?
- Where have we gotten the most traction supporting community members and partners in the past? Where have we struggled to engage and support them?
- Are there services that we don't currently provide but that you think would address an unmet need (e.g., low-cost childcare, access to technology)?



#### **Director of Industry Partnerships**

#### Sample Questions

- What are the top challenges that employer partners are raising (e.g., access to talent or infrastructure, insufficient housing for their employees) in recent interactions?
- What challenges are you running into when trying to attract prospective industry partners to our area?



#### **Director of Government Relations**

#### Sample Questions

- What are local and state officials raising as top issues or priorities? Which do you feel the most versus least equipped to address?
- What trends do you see in recent policies and proposals related to community needs?



#### **Director of K-12 Outreach**

#### Sample Questions

- What kinds of community challenges or school priorities have come up in your recent interactions?
- Are there educational attainment or performance goals that our collective community is struggling to meet?
- Are there services that we don't currently provide but that you think would address an unmet need (e.g., STEM workshops)?



#### **Director of Economic Development**

#### Sample Questions

- What issues or priorities have community members voiced in recent interactions?
- What challenges are you running into when trying to attract investment in and/or partners to our area?
- What are the greatest risks you see in terms of our city's and region's long-term economic prosperity?



#### **Director of Extension**

#### Sample Questions

- What issues or priorities have community members voiced in recent interactions?
- If you had more time, staff, and/or resources, where would you focus additional attention and/or services? Why?



# **Internal Intel Gathering**

Gather Input From Internal Leaders With Knowledge About Community Needs

Use the space below to jot down top community needs based on input from internal leaders.

	100		
Director of Community Engagement		Director of K-12 Outreach	
Notes:		Notes:	
Director of Industry Partnerships	9-19	Director of Economic Development	,
Notes:		Notes:	

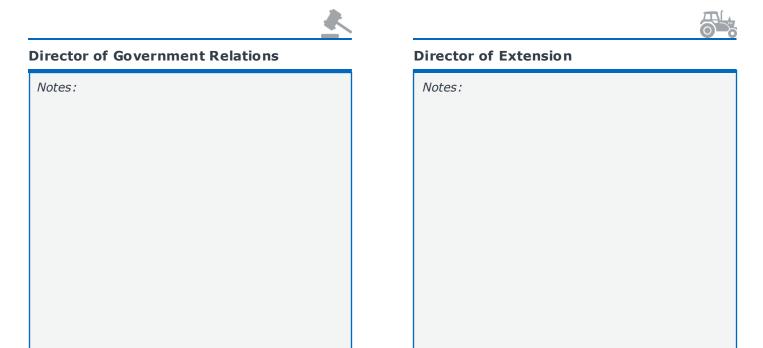


Strategic Advisory Services

# **Internal Intel Gathering**

Gather Input From Internal Leaders With Knowledge About Community Needs

Use the space below to jot down top community needs based on input from internal leaders.





## **External Intel Gathering**

#### Gather Input From External Leaders With Knowledge About Community Needs

Below is a list of recommended external leaders to consult, each of whom is likely to possess valuable intel about current community needs. Use the sample questions on this page to guide your intel gathering and the space on pages 16 and 17 to document your findings. If your institution does not have relationships with these leaders and/or specific contacts prove difficult to reach, focus on representatives of major community stakeholder groups rather than specific job titles.



#### **Chamber of Commerce**

#### Sample Questions

- What are the biggest challenges you see facing our city and local community?
- Are there certain community issues or priorities that have proven difficult to move the dial on?
- What unmet needs have local businesses raised in your recent conversations?



#### Employer(s)/Industry Partner(s)

#### Sample Questions

- What are the biggest challenges you are facing with regards to talent, technology, and/or infrastructure?
- What concerns or priorities are your employees raising about the local community and/or school system?



#### Local or State Representative(s)

#### Sample Questions

- What are the biggest issues or priorities that your constituencies are raising? Which feel more urgent than in the past?
- Are there certain policies or initiatives coming down the pike that will directly impact our local community? If yes, how so?



#### K-12 Superintendent(s)

#### Sample Questions

- What kinds of community challenges are making their way into the classroom? Which do you feel most versus least well-equipped to address?
- What concerns are you hearing from local parents and students about the community, especially outside the classroom?



#### **Department of Social & Health Services**

#### Sample Questions

- What are the biggest challenges and health concerns you see facing our city and region?
- What services are most in-demand? Are there any services not readily available that would address an unmet community need?



#### **Workforce Development Board(s)**

#### Sample Questions

- What are the top workforce needs you see in our local community and/or region?
- What concerns are you hearing from local employers and workers?
- What challenges are you running into when trying to attract investment in and/or industry partners to our area?





# **External Intel Gathering**

Gather Input From External Leaders With Knowledge About Community Needs

Use the space below to jot down top community needs based on input from external leaders.

Chamber of Commerce		K-12 Superintendent(s)
Notes		Notes
Employer(s)/Industry Partner(s)	∭. ₩₩₩	Department of Social & Health Services
Notes		Notes





# **External Intel Gathering**

Gather Input From External Leaders With Knowledge About Community Needs

Use the space below to jot down top community needs based on input from external leaders.



# Local or State Representative(s) **Workforce Development Board(s)** Notes Notes



# External Perspective-Taking Worksheet

Nuance Your Understanding of External Constituencies' Perspectives and Priorities for Higher Education

TOOL

3



## **External Perspective-Taking Worksheet**

Nuance Your Understanding of External Constituencies' Perspectives and Priorities

The purpose of this tool is to help campus leadership teams diagnose what key external constituencies value and expect from their institution.

At a macro level, EAB has found that all external constituencies—ranging from more value-conscious prospective students and families to employers and donors to public officials—are increasingly acting like investors who expect to get a return on their investment and therefore are laser-focused on provable outcomes and impact.

However, there is still lots of nuance and variation among external constituencies' specific expectations, value-drivers, and proposals. Campus leadership teams should therefore supplement macro-level trend analyses with more detailed perspective-gathering among their institution-specific constituencies.

#### Instructions

Cabinet leadership teams should assign a "scribe" responsible for completing this worksheet by collecting and synthesizing relevant information. This delegate should incorporate cabinet leaders' perspectives, as well as consult colleagues in relevant areas (e.g., enrollment, advancement, research) as needed.

- For each external constituency, start by reviewing EAB's macro analysis of key priorities (row 1 on the following pages).
- For each external constituency, respond to the prompts in rows 2-5 on the following pages. When doing so, try to put yourself into the shoes of each external constituency.
- 3 Synthesize and analyze responses across all six of the external constituencies, pinpointing 3-5 commonly shared perspectives and/or priorities that the institution should address.



# **External Perspective-Taking**

Gather Intel About Each External Constituency's Perspective and Priorities

External Constituency	<b>Prospective Students</b>	<b>Prospective Parents</b>
EAB's Macro Analysis of Key Priorities	<ul> <li>✓ ROI of a degree</li> <li>✓ Value relative to cost and debt</li> <li>✓ Higher-paying, career-focused program and degree options</li> <li>✓ Career preparation and practical, hands-on experiences</li> </ul>	<ul> <li>✓ Cost of a degree</li> <li>✓ Ability for their kids to be financially independent</li> <li>✓ Prospects for a fulfilling and well-paying career</li> <li>✓ Career readiness, including internship opportunities</li> </ul>
Identify which of the above priorities resonate most versus least given your unique institutional context and constituency demographics		
Identify 2-3 specific examples of how these priorities are currently playing out at your institution		
Identify any <b>priorities that feel missing</b> based on your unique institutional context and constituency demographics		
Identify 2-3 specific examples of <b>critiques</b> or <b>concerns</b> this constituency either has raised or might raise about your institution		



# **External Constituency Perspective-Taking**

Gather Intel About Each External Constituency's Perspective and Priorities

External Constituency	Employers	Donors
EAB's Macro Analysis of Key Priorities	<ul> <li>✓ Industry-aligned academic programs and credentials</li> <li>✓ Strong talent pipeline</li> <li>✓ Job-ready new hires</li> <li>✓ Graduates who possess nontechnical, professional skills</li> </ul>	<ul> <li>✓ Provable ROI and career outcomes for students</li> <li>✓ Measurable impact of programs and investments</li> <li>✓ Initiatives that address relevant, real-world problems</li> </ul>
Identify which of the above priorities resonate most versus least given your unique institutional context and constituency demographics		
Identify 2-3 specific examples of how these priorities are currently playing out at your institution		
Identify any <b>priorities that feel missing</b> based on your unique institutional context and constituency demographics		
Identify 2-3 specific examples of <b>critiques or concerns</b> this constituency either has raised or might raise about your institution		



# **External Constituency Perspective-Taking**

Gather Intel About Each External Constituency's Perspective and Priorities

External Constituency	State Officials	Federal Officials
EAB's Macro Analysis of Key Priorities	<ul> <li>✓ Economic and workforce development</li> <li>✓ Long-term student success and career outcomes</li> <li>✓ Faster, high-demand credential programs</li> <li>✓ Career and technical education</li> </ul>	<ul> <li>✓ Institutional accountability for post-graduation outcomes</li> <li>✓ Public engagement and impact</li> <li>✓ Technological innovations</li> <li>✓ Solutions to real-world problems</li> <li>✓ Public-private partnerships</li> </ul>
Identify which of the above priorities resonate most versus least given your unique institutional context and constituency demographics		
Identify 2-3 specific examples of how these priorities are currently playing out at your institution		
Identify any priorities that feel missing based on your unique institutional context and constituency demographics		
Identify 2-3 specific examples of <b>critiques or concerns</b> this constituency either has raised or might raise about your institution		

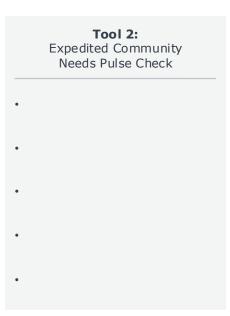


# Pinpointing Best-Bet Areas for Strategic Investment

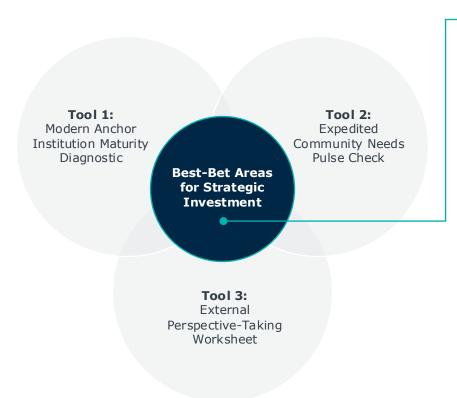
Prioritizing Investments Based on Current Performance and External Priorities

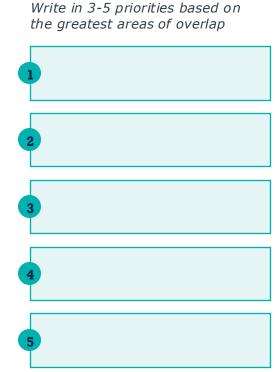
In the grey boxes below, write in 3-5 priorities identified using the preceding tools. Then, look for areas of overlap across these priorities. Your best-bet investment opportunities are those that emerged as priorities in all three tools. Write those in the teal boxes below.

# Tool 1: Modern Anchor Institution Maturity Diagnostic .



<b>Tool 3:</b> External Perspective-Taking Worksheet
•
•
•
•
•





**Anchor Investment Priorities** 



The Modern Anchor Institution

## Associated EAB Resources and Services

Investment Area	EAB Resources and Services
1: Build the College- Going Pipeline Through Upstream Interventions	Schedule a consultation to review how market forces are impacting your enrollment. The UEO reviews historical enrollment and forecasts how demographic decline, changing college-going rates, and increased competition will affect your institution through 2035.  Other immediately available resources:  Adult Degree Completer Recruitment Center  Student Readiness Resource Center  Evolving College Access Programs Report  Converting the Shadow Funnel of Non-Consumers Workshop
2: Reshape the Academic Experience to Better Deliver on Social Mobility	Schedule a consultation to learn about leveraging virtual job simulations within and beyond the classroom. Forage simulations are self-paced, skill-building opportunities built with 130+ employers across diverse industries. They are available 24/7 and free for students, faculty, and universities.  Other immediately available resources:  Experiential Major Map Workbook  Adapting Student Career Development for the Gen Z Era  Rightsizing the Academic Program Portfolio
3: Drive Real- World Impact by Scaling Community- Centric Research	Deans Advisory Services  Connect your deans with EAB resources and support. Deans Advisory Services provides deans with dedicated research, services, and implementation assistance on topics like strategy and differentiation, faculty recruitment and retention, research administration, and more.  Other immediately available resources:  Competing in the Era of Research Superstars Workshop  Launch Grand Challenges Initiatives to Attract Large-Scale Research Investments  Use Research Development to Pursue Large and Complex Federal Funding Opportunities
4: Catalyze Mutually Beneficial Economic Development	Services:  Expanding the Scope of Industry Partnerships  Schedule a campus workshop on growing collaboration with industry leaders. This session will cover topics like identifying best-fit partners, communicating a distinct value proposition, organizing internally for effective decision making and relationship management, and more.  Other immediately available resources:  Build a Market-Smart Org Structure for University-Industry Partnerships  Economic Development Communications Trends and Tools  Navigating Public-Private Partnerships Briefing

### **Project Contributors**

#### **Project Director**

Kate Brown

#### **Contributing Consultants**

Brooke Thayer Lilia Shea Cameron Jessup

#### **Managing Director**

Colin Koproske

#### **About EAB**

At EAB, our mission is to make education smarter and our communities stronger. We harness the power of more than 1,500 institutions to uncover and apply proven practices and transformative insights. From kindergarten to college and beyond, EAB partners with education leaders to accelerate progress and drive results in three key areas: enrollment, student success, and institutional strategy. For more information, visit eab.com.

#### Legal Caveat

EAB Global, Inc. ("EAB") has made efforts to verify the accuracy of the information it provides to partners. This report relies on data obtained from many sources, however, and EAB cannot guarantee the accuracy of the information provided or any analysis based thereon. In addition, neither EAB nor any of its affiliates (each, an "EAB Organization") is in the business of giving legal, accounting, or other professional advice, and its reports should not be construed as professional advice. In particular, partners should not rely on any legal commentary in this report as a basis for action, or assume that any tactics described herein would be permitted by applicable law or appropriate for a given partner's situation. Partners are advised to consult with appropriate professionals concerning legal, tax, or accounting issues, before implementing any of these tactics. No EAB Organization or any of its respective officers, directors, employees, or agents shall be liable for any claims, liabilities, or expenses relating to (a) any errors or omissions in this report, whether caused by any EAB Organization, or any of their respective employees or agents, or sources or other third parties, (b) any recommendation by any EAB Organization, or (c) failure of partner and its employees and agents to abide by the terms set forth herein.

EAB is a registered trademark of EAB Gbbal, Inc. in the United States and other countries. Partners are not permitted to use these trademarks, or any other trademark, product name, service name, trade name, and logo of any EAB Organization without prior written consent of EAB. Other trademarks, product names, service names, trade names, and logos used within these pages are the property of their respective holders. Use of other company trademarks, product names, service names, trade names, and logos or images of the same does not necessarily constitute (a) an endorsement by such company of an EAB Organization and its products and services, or (b) an endorsement of the company or its products or services by an EAB Organization. No EAB Organization is affiliated with any such company.

#### IMPORTANT: Please read the following.

EAB has prepared this report for the exclusive use of its partners. Each partner acknowledges and agrees that this report and the information contained herein (collectively, the "Report") are confidential and proprietary to EAB. By accepting delivery of this Report, each partner agrees to abide by the terms as stated herein, including the following:

- All right, title, and interest in and to this Report is owned by an EAB Organization. Except as stated herein, no right, license, permission, or interest of any kind in this Report is intended to be given, transferred to, or acquired by a partner. Each partner is authorized to use this Report only to the extent expressly authorized herein.
- Each partner shall not sell, license, republish, distribute, or post online or otherwise this Report, in part or in whole. Each partner shall not disseminate or permit the use of, and shall take reasonable precautions to prevent such dissemination or use of, this Report by (a) any of its employees and agents (except as stated below), or (b) any third party.
- 3. Each partner may make this Report available solely to those of its employees and agents who (a) are registered for the workshop or program of which this Report is a part, (b) require access to this Report in order to learn from the information described herein, and (c) agree not to disclose this Report to other employees or agents or any third party. Each partner shall use, and shall ensure that its employees and agents use, this Report for its internal use only. Each partner may make a limited number of copies, solely as adequate for use by its employees and agents in accordance with the terms herein.
- Each partner shall not remove from this Report any confidential markings, copyright notices, and/or other similar indicia herein.
- Each partner is responsible for any breach of its obligations as stated herein by any of its employees or agents.
- If a partner is unwilling to abide by any of the foregoing obligations, then such partner shall promptly return this Report and all copies thereof to EAB.



202-747-1000 | eab.com

@@@ab @@@ab\_ @WeAreEAB



@ @eab.life

#### **ABOUT EAB**

At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.