

A READINESS GUIDEBOOK FOR CAMPUS LEADERS

# Making Value the Strategy:

## Infusing the Postsecondary Value Framework Into Strategic Planning

**SEPTEMBER 2025**

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Credit: Stockton University (NU)

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*Credit: Stockton University (NJ)*



# Executive Summary



Credit: Stockton University (NJ)

## Acknowledgments

We would like to thank the Gates Foundation for its generous support of the American Association of State Colleges and Universities (AASCU) and the various AASCU programs and projects related to the Postsecondary Value Commission's Postsecondary Value Framework (PVF)—including this leadership guidebook. A special thanks goes to Jamey Rorison, senior program officer at the Gates Foundation. Jamey's perspective, insights, and guidance have been invaluable.

Charles L. Welch, AASCU's current president and CEO, and Mildred Garcia, AASCU's past president and CEO, have been the stalwart drivers of AASCU's mission. The broader AASCU team—representing all functions—have been the backbone of progress on the PVF.

Especially significant has been the work and steady hand of Matt Ceppi, AASCU's vice president for strategic development and managing director of AASCU Consulting. We commend Matt's laser focus on doing the right things for the best student and institutional outcomes.

We wish to thank the original and current grant-funded projects and institutions working across the AASCU enterprise to enact the PVF. Of notable importance is the Strategic Planning Collaborative—the five AASCU institutions with whom we had an honor and privilege to partner: Bemidji State University/ Northwest Technical College, Montclair State University, San José State University, Stockton University, and SUNY Oswego. Their presidents—John Hoffman, Jonathan Koppell, Cynthia Teniente-Matson, Joe Bertolino, and Peter Nwosu, respectively—were engaged and active participants during our campus proceedings. Their executive teams, strategic planning steering teams, the myriad of PVF champions, and, of course, their administrative assistants were integral to this project's success.

We received assistance from researchers, graphic designers, and editors, including Ashlee Hendrix, Lucas Jasinski, and Kate Hall. Enduring support came from our spouses Rick Gonzalez and Denise Jasinski. We are lucky to be beneficiaries of their encouragement and backing.

Finally, we have profound gratitude to all those trailblazers that have championed the causes associated with the PVF throughout higher education's history—both here and abroad. Our work never ceases, and the impacts are truly life-, community- and nation-changing.

## Charge

The overall charge was to develop a leadership guidebook that higher education institutions can use to help assess their readiness for integrating the Postsecondary Value Commission's Postsecondary Value Framework (PVF) in their strategic plan. This guidebook is based on the experiences of the Strategic Planning Collaborative—a set of five AASCU member institutions.

AASCU's mission is to champion the nation's regional public universities to drive economic mobility through education and discovery. The five participating institutions were asked to develop a strategic roadmap for their university's strategic plan that leverages promising practices and reflects the institution's commitment to outcomes reflected in the PVF. Some of the expectations of participating institutions included (1) a willingness and commitment from top leadership to implement and manage change, (2) an organizational culture that can sustain strategy, and (3) stability of university leadership.

The original Postsecondary Value Commission's Action Agenda, published in 2021, served as the foundation for this Strategic Planning Collaborative's initial work. In the fall of 2024, three of the five participants engaged in the process. As the external context evolved in early 2025, the remaining two participants engaged in the spring of 2025 and the content was revised. To address the Postsecondary Value Framework and its connection to postsecondary value, the content was reframed to emphasize access, affordability, support, completion, earnings, and wealth for all students.



Credit: Bemidji State University (MN)

## Executive Summary

The overall charge was to develop a leadership guidebook to help higher education institutions assess readiness for the Postsecondary Value Framework (PVF) and ways to embed the PVF into their new or existing strategic plans. The Postsecondary Value Framework helps institutions identify and remove barriers that prevent students from realizing the value and economic and social mobility associated with receiving higher education credentials. Specifically, the PVF works to enhance access, affordability, support, completion, earnings, and wealth for all students.

Five AASCU institutions were competitively selected for the Strategic Planning Collaborative: State University of New York at Oswego (SUNY Oswego), Stockton University (NJ), and Montclair State University (NJ) participated in fall 2024. Bemidji State University/Northwest Technical College (MN) and San José State University (CA) participated in spring 2025. Two senior consultants with AASCU Consulting facilitated processes on all campuses allowing campus leaders to develop strategic plans around the PVF or to embed the PVF into existing strategic plans.

AASCU Consulting supported and facilitated processes and served as the connective tissue between the PVF and participating institutions. The assigned senior consultants served the institutions as consultants, facilitators, and coaches. This occurred through, for example, reviewing the desired strategic planning outcomes and targets to assess alignment with advancing the pathways to postsecondary value; presenting promising practices that align with and can advance the identified desired outcomes; and facilitating discussions on strategies to achieve the desired outcomes, actions, and capabilities needed to pursue them.

Workshop materials were developed between spring and fall 2024, and the Strategic Planning Collaborative was initially formed in early summer 2024. On-site and virtual work took place during fall 2024 and spring 2025, and the project concluded in summer 2025. Due to the changing external context in early 2025, the Postsecondary Value Framework and material content were modified for two of the five participants that engaged in the process during spring 2025.

On-site work included either one-day or 1.5-day highly interactive sessions with campus executives, planning teams, and a myriad of institutional stakeholders. On-site sessions were supplemented through virtual meetings that included interviews, assessments, and facilitated sessions. Leading up to campus visits, participants received a set of pre-read materials and a readiness survey. The on-site sessions included designed curriculum with a slide deck and workbook and five desired outcomes:

1. Learning more about higher ed's value problem
2. Introducing the Postsecondary Value Framework (PVF)
3. Implementing the PVF on your campus
4. Embedding the PVF into your strategic plan
5. Assessing and improving your PVF work

The Strategic Planning Collaborative members represented wide variance regarding the status of their strategic plans—from just beginning to already completed—and their needs from facilitated interactions differed as well.

The following are some of the key findings and lessons learned:

- The original work and intent of the Postsecondary Value Commission, completed in 2021, remains vital today in that the data continue to show significant gaps in students earning a college degree based on student type, which ultimately increases the wealth gap between student types.
- The institutions comprising the collaborative were at different stages of strategic planning—with various approaches to strategic planning/framing/positioning. The PVF was relevant to use and embraced as a construct within each of the strategic plans.
- Although most institutions scored slightly above the average on the organizational readiness to change assessment instrument, the **areas of concern clustered around their organizational culture being ready to sustain the change recommended by the PVF, their ability to resource the changes needed, and their confidence in developing and implementing strategic plans.**
- Staff members scored the items comprising the Organizational Readiness for Change Assessment significantly lower than executive leaders, administrators, and faculty did. Since staff members will be responsible for implementing much of the change recommended by the PVF, the data suggest that they will need additional support.
- From a strategic planning process point of view, taking time to “talk strategy” with an array of internal and external stakeholders—readying them for the process, socializing them to current and possible future conditions and the PVF, articulating the desired mix of strategy and operations within the plan, outlining the process ahead, and addressing the institutions strategic position—can be helpful.
- Leaders should be able to make decisions about focusing strategy using the PVF as a guidepost.
- Leaders should be involved in PVF proceedings and serve as steadfast champions for postsecondary value.

Possible next steps include refining the original Postsecondary Value Commission's Action Agenda based on needs for 2026 and beyond, considering implementing a second phase of this work with a university system and five other AASCU institutions with differing institutional characteristics and geography, and tracking the five Strategic Planning Collaborative institutions over time and assessing impacts of PVF implementation.

### Key Finding

Institutions' areas of concern clustered around their organizational culture being ready to sustain the change recommended by the PVF, their ability to resource the changes needed, and their confidence in developing and implementing strategic plans.



## How can institutional leaders use this guide to prepare their campus for focusing on value?

### 1) BEGIN THE DISCUSSION

**Presidents can discuss the following key questions with their cabinets today to prepare their campus for this work:**

What is our shared understanding of postsecondary value and our institution's role in delivering it across varying stakeholder groups (board, senior leadership team, mid-level leaders, faculty and staff leaders, alumni, etc.)?

What internal obstacles do we need to address within our culture, policies, or resource allocation processes that could help accelerate our efforts in fully implementing the Postsecondary Value Framework?

What are the "legacy" practices or programs we need to let go of to focus time, energy, and resources on advancing value? Is our campus culture receptive to adopting or adapting promising practices rather than reinventing the wheel? What promising practices might we focus on in a first wave of change and why we would highlight these first?

What values-based metrics do we track and use currently to understand our impact on postsecondary outcomes and value? What new values-based metrics should we consider adopting? How can we make our data more actionable for strategic decision-making?

### 2) TAKE THE READINESS ASSESSMENT

Take the readiness assessment at <https://aascuconsulting.org/PVCReadinessAssessment>

Pay particular attention to the key findings in the guidebook, which identify the five factors on which readiness largely depends.

To distribute the assessment to your cabinet and other campus stakeholders and receive a summary report for your institution, please contact us at [aascu.consulting@aascu.org](mailto:aascu.consulting@aascu.org) for a specific link.

### 3) PLAN A WORKSHOP

To host a facilitated workshop at your institution, contact us at [aascu.consulting@aascu.org](mailto:aascu.consulting@aascu.org).

**“The “returns for students” occur when students achieve economic mobility and the opportunity to build wealth and improve their well-being through academic, civic, and social engagement.**



Credit: Montclair State University (MSU)

# Origins and Framework: Understanding the Postsecondary Value Commission

The Postsecondary Value Commission launched in April 2019, with the Institute for Higher Education Policy managing the project. The commission—co-chaired by Sue Desmond-Hellmann, then CEO of the Gates Foundation, and Mildred Garcia, then president and CEO of the American Association of State Colleges and Universities (AASCU)—included 30 members, representing educators, executives, policymakers, researchers, advocates, and students. Through their experiences, they explored ways to define and measure postsecondary value and build momentum toward actionable change. Below we introduce you to the commission, its Postsecondary Value Framework, and the Strategic Planning Collaborative.



## Postsecondary Value Commission

The Postsecondary Value Commission was formed to draw attention to growing concerns around the declining value of a postsecondary education degree and ways to reverse this trend by fostering access to critical post-college outcomes, including sufficient earnings, high-quality jobs, and economic mobility and security.

College debt with no degree contributes to the public perceiving on-the-job training and certificates as having more value in preparing students for the workplace than a two- or four-year degree.<sup>1</sup> Also, student loan debt without the degree contributes to the persistent wage and wealth gaps students are trying to overcome by going to college in the first place.

Postsecondary value consists of many interconnected elements. The commission developed a framework to understand interconnected elements. The framework features two sets of economic returns—returns for students and returns for society—that are possible when all students can earn a college degree.

The “returns for students” occur when students achieve economic mobility and the opportunity to build wealth and improve their well-being through academic, civic, and social engagement. The “returns for society” occur when there is an expansion of the nation’s public economic resources, improved health and security, and when more citizens are civically engaged and empowered. Both sets of returns are dependent on students having the opportunity to earn a college degree, which is the sole focus of the Postsecondary Value Commission’s Action Agenda.

1. Coblentz, E. (March 27, 2024). More high schoolers are seeing greater value in on-the-job training than college. USA Today. Retrieved January 19, 2025 from <https://www.usatoday.com/story/news/education/2024/03/27/young-people-value-on-the-job-training-college-study/73118558007/>.

# Postsecondary Value Framework (PVF)

The PVF advances three sets of recommendations—one for federal policymakers, one for state policymakers, and one for institutional leaders—that, if implemented, will ensure that all students can earn a college degree. This project focused specifically on helping institutional leaders implement the PVF on their respective campuses by ensuring that it was included in their strategic plans.

Table 2.1 below lists and describes the six focus areas of the PVF: access, affordability, support, completion, earnings, and wealth. The opportunity for all students to earn a postsecondary credential increases when all students have access to higher education, when a degree is affordable, and when students are provided with appropriate support to pursue degree programs with high return on investment such as STEM degrees, complete their degree in a timely manner, and work in professional fields where they have the opportunity to generate wealth over time.

The PVF and possible actions are not exhaustive in nature. Instead, the commission hopes focus areas and suggestions will stimulate other recommendations and bold solutions that will advance postsecondary value.

Table 2.1: Postsecondary Value Framework

Focus Area	Description
Access to Ensure Postsecondary Value	Postsecondary education must ensure all students are afforded opportunities to enroll in institutions and programs that provide value and lead to social and economic mobility.
Affordability to Ensure Postsecondary Value	Postsecondary education must ensure that all students are able to afford and fund opportunities to enroll in institutions and programs that provide value and lead to social and economic mobility.
Support to Ensure Postsecondary Value	Postsecondary education must ensure that all students are afforded support systems and structures to help ensure completion.
Completion and Post-College Outcomes to Ensure Postsecondary Value	Postsecondary education must deliver strong completion and workforce outcomes for all students to create economic value and ensure an adequate return on investment.
Earnings to Ensure Postsecondary Value	Postsecondary education should strive to move all students toward economic security.
Wealth to Ensure Postsecondary Value	Postsecondary education should strive to ensure all students realize wealth over time, having economic and non-economic benefits, and transfer that wealth from one generation to the next.

# Strategic Planning Collaborative

The Strategic Planning Collaborative was formed to integrate the Postsecondary Value Commission's Action Agenda into select institutions strategic plans. AASCU partnered with institutions to implement the action agenda.

The four primary goals of the collaborative were to:

1. **Help institutions increase postsecondary value by integrating the action agenda into their strategic plans.**
2. **Increase the number of institutions adopting the action agenda based on their seeing how other institutions benefited from the action agenda.**
3. **Guide institutions as they navigate national and state policy in implementing the action agenda.**
4. **Enhance how other institutions implemented the action agenda by using learnings from the Strategic Planning Collaborative.**

The Strategic Planning Collaborative included five institutions competitively selected from a larger pool of institutions. The five institutions selected reflect the institutions that AASCU supports and serves.



## STATE UNIVERSITY OF NEW YORK AT OSWEGO

Located in upstate New York, SUNY Oswego is a regional public university with close to 6,500 students. It is a rural-serving, residential campus with over 55% of students living on campus, and over 40% of their students come from underrepresented groups. SUNY Oswego is one of 13 universities that comprise the State University of New York system and offers more than 120 undergraduate, graduate, and professional-based programs.



## MONTCLAIR STATE UNIVERSITY

Located in Montclair, New Jersey, Montclair State University is a public research university serving 22,500 students with more than 50% of its students identifying as underrepresented minorities. Montclair is New Jersey's largest Hispanic-serving institution. The university offers more combined bachelor's and master's degree programs than any other university in New Jersey—empowering students to enter the workforce faster, with stronger skills and for less cost.



## **STOCKTON UNIVERSITY**

Located in Galloway, New Jersey, Stockton University is a public university serving over 8,700 students with more than 160 undergraduate, graduate programs, and continuing education opportunities. Stockton University supports an interdisciplinary approach to liberal arts, sciences, and professional education where 43% of students are from underrepresented populations.



## **BEMIDJI STATE UNIVERSITY/ NORTHWEST TECHNICAL COLLEGE**

Located a few miles apart from each other, these two schools have been operating under the leadership provided by Bemidji State University. Bemidji State is the four-year institution, and Northwest Technical College is the two-year institution. Located on the western shore of Lake Bemidji in Minnesota, Bemidji State University is a rural-serving regional public university with close to 5,500 students with over 65 undergraduate and 14 graduate programs. Slightly more than 20% of Bemidji State students are from underrepresented populations, with 4% of its students identifying as American Indian/Alaska Native. Northwest Technical College prepares students for careers in highly skilled, sought-after fields including automotive services, building systems, business, cosmetology, early childhood education, and health care.



## **SAN JOSÉ STATE UNIVERSITY**

Located in the Silicon Valley of California, San José State University is a regional public university granting degrees in 250 areas of study. It is both a Hispanic and Asian American and Native Pacific Islander serving institution. Almost 70% of San José State University's 36,000 students are from underrepresented populations. San José State is the oldest public university on the West Coast and the founding campus of the California State University system currently comprising 23 campuses.



Credit: Montclair State University (NJ)

**“ Postsecondary education must ensure that all students are afforded support systems and structures to help ensure completion.**

*– Postsecondary Value Framework Focus Area*

# Assessing Organizational Readiness for Change

One factor that can accelerate or impede how well the PVF Action Agenda is implemented is the institution's readiness for change. This section of the guidebook defines organizational readiness for change, details how it was assessed, presents the results of the assessment, and provides a summary of findings.

## Organizational Readiness for Change Defined

Organizational readiness for change is defined as the psychological and behavioral preparedness of an organization's members to implement change. Specifically, it examines employees' collective commitment to change and their confidence in their ability to successfully implement the change. After a set of initial interviews with higher education leaders, four readiness concepts emerged: culture, leadership, experience, and knowledge. Cultural readiness is when the organization's "ways of doing business and treating others" is healthy and can sustain the pending change. Leadership readiness is when the executive team is "stable and in a place" where they can invest time implementing change. Experience is the leadership's "practice and familiarity with implementing change." Finally, knowledge consists of leaders "knowing what to do" to implement the change.

## Organizational Readiness for Change Assessed

The Organizational Readiness for Change Assessment (ORCA) comprises 13 items reflecting the four readiness concepts discussed above. The instrument is a self-report assessment and uses a six-item, Likert-type measure where 6 = very ready and 1 = not ready.



Credit: Bemidji State University (MN)

Items comprising the measure include:

Readiness Assessment Item	Rating
We are ready in that we have commitment from top leadership to implement change including commitment from board members, senior leaders, and academic leaders.	
We are ready in that we have a healthy organizational culture that can sustain strategy (i.e., Postsecondary Value Framework) rather than "eating it for lunch."	
We are ready in that we have stable leadership that is committed to the Postsecondary Value Framework.	
We are ready in that we have a history of aligning expenses with revenues (or seeking new sources of revenues) to ensure that strategic plans (i.e., Postsecondary Value Framework) are appropriately resourced.	
We are ready in that we have a history of success in implementing strategic plans (i.e., Postsecondary Value Framework) that affect change.	
We are ready in that we are committed to making college attainment more accessible and affordable for all students.	
We are ready in that we are receptive to implementing promising practices for access, affordability, and completion, and that facilitate economic mobility for all students.	
We are ready in that "ready institutions" stay focused on key priorities that ensure the value of a college degree for all students.	
We are ready in that we are prepared to remove structures, policies, and processes that prevent all students from completing a college degree.	
We are ready in that we are motivated to address economic mobility outcomes for all students.	
We are ready in that we know what decisions need to be made to ensure the Postsecondary Value Framework is implemented.	
We are ready in that we have the appropriate resources to implement changes associated with the Postsecondary Value Framework.	
We are ready in that we are prepared to adopt promising practices identified by the American Association of State Colleges and Universities (AASCU) as moving the dial on access, affordability, completion, and economic mobility.	

**Data were collected from 122 participants across five institutions. The results showed a very high level of consistency and internal reliability (Cronbach alpha of .93). A principal component analysis was computed using the data collected. This analysis yielded results showing that all 13 items loaded most heavily on a single factor, accounting for 56% of the variance, suggesting that the instrument is assessing organizational readiness for change. Together, these results suggest that the ORCA survey items can be combined into one overall score, giving a reliable and focused measure of organizational readiness for change.**

# Organizational Readiness for Change Results

With the data collected from all five institutions, the ORCA had an actual range from 24 to 78, with an average score of 51.13 ( $SD=12.1$ ). The descriptive statistics for the individual five institutions comprising the consortium are reflected in Table 3.2 below.

Table 3.2: Descriptive Statistics for the Five Institutions Comprising the Consortium

Institution	n-size	Average	Standard Deviation
Institution A	25	54.0	9.5
Institution B	33	49.9	9.3
Institution C	12	61.0	14.3
Institution D	23	54.9	11.8
Institution E	29	42.9	11.9

Since normative data are not available to determine organizations that are high or low in organizational readiness, the ORCA's average was used. Institutions scoring above the average score of 51 are considered high-readiness organizations. Institutions scoring below the average of 51 are considered low-readiness organizations. Based on this benchmarking, three of the five institutions were organizationally ready and two fell below the 51 average score and were considered less ready.

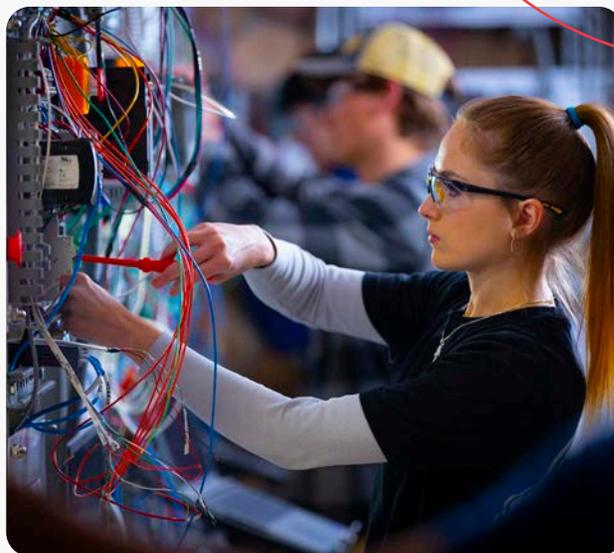
Among the 13 items comprising the ORCA, the highest scoring item among the five institutions was item 6: "We are ready in that we are committed to making college attainment more accessible and affordable for all students." The lowest scoring item was item 12: "We are ready in that we have the appropriate resources to implement changes associated with the Postsecondary Value Framework." The results also showed a meaningful difference based on roles—about 14% of the differences in survey responses could be explained by the type of position held. As shown in Table 3.3, staff members reported lower levels of organizational readiness compared to the other groups. Their average score was 42.1, with scores ranging from 24 to 78. This difference was statistically significant.

Table 3.3: Descriptive Statistics on Position Held at University

Type of Position	n-size	Average	Standard Deviation
Executive Leadership	44	54.2	11.15
Administration	37	53.1	12.2
Faculty	11	50.0	11.60
Staff	28	42.1	14.91

## Readiness Summary

The above data suggest that all the institutions, except for two, had an organizational readiness for change as it relates to adopting best practices advanced by the Postsecondary Value Framework. With a range from 24 to 78, the ORCA had an average score of 51.13 ( $SD=12.1$ ). Among the 13 items comprising the ORCA, the highest scoring item among the five institutions was item 6: "We are ready in that we are committed to making college attainment more accessible and affordable for all students." The lowest scoring item was item 12: "We are ready in that we have the appropriate resources to implement changes associated with the Postsecondary Value Framework." The data suggest that staff members, unlike other employees including executive leadership, administrators, and faculty, are significantly less ready for organizational change.



Credit: Bemidji State University (MN)

We encourage the institutions with a lower Organizational Readiness for Change Assessment to invest time in developing strategies to enhance their readiness as it relates to the below five items, which were some of the lower-scoring items on the ORCA. It should also be noted that "staff members" more than other groups of employees scored these items lower across all five institutions.

- We are ready in that we have a healthy organizational culture that can sustain strategy (i.e., Postsecondary Value Framework) rather than "eating it for lunch."
- We are ready in that we have a history of aligning expenses with revenues (or seeking new sources of revenues) to ensure that strategic plans (i.e., Postsecondary Value Framework) are appropriately resourced.
- We are ready in that we have a history of success in implementing strategic plans (i.e., Postsecondary Value Framework) that affect change.
- We are ready in that we are prepared to remove structures, policies, and processes that prevent all students from completing a college degree.
- We are ready in that we have the appropriate resources to implement changes associated with the Postsecondary Value Framework.

“We believe that institutions who score lower in these areas would benefit from developing a set of strategies to increase readiness before implementing the PVF on their campuses.

The above five items cluster around three areas of concern: organizational culture, resourcing strategic plans, and confidence in developing and implementing strategic plans. There are no easy solutions to increasing readiness around these three areas of concern, but **we believe that institutions who score lower in these areas would benefit from developing a set of strategies to increase readiness before implementing the PVF on their campuses.** There are numerous resources available that address ways to build organizational culture as well as implement and resource strategic plans within the higher education context. We also encourage institutions to contact AASCU Consulting (<https://aascuconsulting.org/>) to request assistance in customizing PVF materials and address readiness concerns.



Credit: Montclair State University (MSU)

**“I appreciated learning about this framework and having the conversation in person with my colleagues from across campus who I have either not met in person or don't get many opportunities to see in person. It was good to...think more strategically about what is important for our university community, our goals, and how we want to try to get there.**

*– Comment from a strategic planning collaborative participant*

# Embedding the Postsecondary Value Framework Within a Strategic Plan



Credit: Bemidji State University (MN)

## Overview

The approach to embedding the PVF within a strategic plan took shape during the spring and summer of 2024 with material development being in play through fall 2024. On-site and virtual work took place during fall 2024 and spring 2025.

In preparing for campus on-site sessions, AASCU senior consultants met with each institution's president and selected delegates and/or points of contact for a Strategic Planning Collaborative/PVF introductory meeting. Meetings lasted between 45 and 60 minutes and covered the following shown in Figure 4.1.

Figure 4.1: Strategic Planning Meeting Collaborative Introductory Meeting Agenda

Strategic Planning Meeting Collaborative Introductory Meeting Agenda
<b>Intro</b>
<ol style="list-style-type: none"><li>1. Welcome and getting to know each other</li></ol>
<ol style="list-style-type: none"><li>2. Affirming:<ol style="list-style-type: none"><li>a. Participation in the Strategic Planning Collaborative/PVF</li><li>b. Timing—what is your desired start date?</li></ol></li></ol>
<b>Strategic Planning Collaborative/PVF questions</b>
<ol style="list-style-type: none"><li>1. What is your end-in-mind desire for the Strategic Planning Collaborative/PVF process?</li></ol>
<ol style="list-style-type: none"><li>2. Any hesitations regarding the process?</li></ol>
<ol style="list-style-type: none"><li>3. Tell us briefly about your current strategic plan—how it was built, its content, its stage of maturation, etc.</li></ol>
<ol style="list-style-type: none"><li>4. What work has been done to date, re: value-based initiatives? How? Why? Status?</li></ol>
<b>Other considerations</b>
<ol style="list-style-type: none"><li>1. Logistics: Who are the primary and secondary contacts for addressing logistics (e.g., meetings dates and times, room set-up, supplies and technology needed, hotel reservations, etc.)?</li></ol>
<ol style="list-style-type: none"><li>2. Is there institutional interest in an expanded scope of work, re: AASCU Consulting facilitating strategic planning/thinking discussions?</li></ol>
<ol style="list-style-type: none"><li>3. What questions do you have of us?</li></ol>

## Addendum: Scope of the Strategic Planning Collaborative/Postsecondary Value Commission Action Agenda

### Overall scope

Participating institutions will develop a strategic roadmap for their university strategic plan that leverages promising practices and reflects the institution's commitment to outcomes reflected in the Postsecondary Value Framework.

Senior consultants from AASCU Consulting will support and facilitate processes and serve as the connective tissue between the Postsecondary Value Framework and participating institutions to develop a strategic roadmap for the university strategic plan that leverages promising practices and reflects the institution's commitment to outcomes reflected in the Postsecondary Value Framework.

### AASCU Consulting's role

1. Review the desired outcomes and targets the university has identified through its strategic planning process (or the university will identify if the strategic plan is in development) to assess alignment with advancing the pathways to postsecondary value— access, affordability, support, completion, earnings, and wealth.
2. Present promising practices that align with and can advance the identified desired outcomes.
3. Facilitate discussions on strategies to achieve the desired outcomes, actions, and capabilities needed to pursue them.

Three of the five Strategic Planning Collaborative institutions requested the PVF workshops be embedded within emergent strategic plan development activities in partnership with AASCU Consulting. One institution requested the training be shaped to an existing strategic plan and one institution requested the planning be conducted in parallel with campus-based strategic plan development.

## PVF Engagement

To ensure elevation of importance of the PVF work, the president's office from each institution invited participants to join the PVF on-site session. Participants included executive team members and content experts from areas addressing the PVF focus areas.

Prior to the on-site session, each participating institution's executive team and PVF workshop participants were sent an email asking for completion of a two-part prework assignment.

1. Review a "PVF-at-a-Glance" slide deck. The slide deck briefly addressed four questions: What is the Postsecondary Value Commission? What is the commission's charge? What is the problem? What is the framework?
2. Complete the online Organizational Readiness for Change Assessment (ORCA) instrument with the results being shared with those attending the training at each respective institution. Section III provides further description of the ORCA.

The on-site session was titled "Helping Students Complete a College Degree: Introducing the Postsecondary Value Framework (PVF)." Five learning outcomes were established for the PVF on-site session:

1. Learning More About Higher Ed's Value Problem
2. Introducing Postsecondary Value Commission Action Agenda (PVF)
3. Implementing the PVF on Your Campus
4. Embedding the PVF Into Your Strategic Plan
5. Assessing and Improving Your PVF Work

A slide deck and companion workbook were developed for the PVF on-site sessions. Figure 4.2 provides the master agenda for the program, which was 1.5 days for three institutions and one day for two institutions. The one-day sessions did not include train-the-trainer modules. Best practices and additional readings were also shared with participants.

Figure 4.2: Master Agenda for the PVF On-Site Sessions

<b>Master Agenda for the PVF On-Site Sessions</b>	
<b>Day 1, ~8:30 a.m. – 4 :30 p.m. (breaks and lunch included)</b>	
<b>1. Higher Ed's Value Problem</b>	<ul style="list-style-type: none"> <li>• Introductions embedded within</li> <li>• Introduction of the PVF Organizational Framework</li> <li>• Awareness of value</li> <li>• Awareness of affordability</li> <li>• Awareness of disconnect</li> <li>• Awareness of outcomes</li> <li>• Workbook reflection questions</li> <li>• Train the Trainer on Higher Ed's Value Problem</li> <li>• ~60 minutes</li> </ul>
<b>2. Introducing the PVF</b>	<ul style="list-style-type: none"> <li>• What is the commission and what was their charge?</li> <li>• What definitions are important?</li> <li>• What is the framework?</li> <li>• What is the action agenda?</li> <li>• Workbook reflection questions</li> <li>• Train the Trainer on the PVF</li> <li>• ~45 minutes</li> </ul>
<b>3. Implementing the PVF</b>	<ul style="list-style-type: none"> <li>• Reviewing and discussing of organizational readiness survey results</li> <li>• Answering reflection questions</li> </ul>
<b>4. Workshop #1, Campus Implementation</b>	<ul style="list-style-type: none"> <li>• Completing survey on campus implementation and removing barriers</li> <li>• Ranking of most important actions to address postsecondary value</li> <li>• Articulating possible PVF implementation steps on campus</li> <li>• ~90 minutes total for numbers 3 and 4</li> </ul>
<b>5. Train the Trainer</b>	<ul style="list-style-type: none"> <li>• Train the Trainer on the PVF Campus Implementation</li> <li>• ~15 minutes</li> </ul>

## Master Agenda for the PVF On-Site Sessions

Day 1, ~8:30 a.m. – 4 :30 p.m. (breaks and lunch included)

### 6. Embedding the PVF Into Your Strategic Plan (Step 1 and Step 2)

- Agreeing upon fundamental language
- Making decisions about what is most important
- Identifying your institution's opportunity gaps
- Reducing your institution's opportunity gaps
- Making decisions about goals
- Making decisions about initiatives
- ~90 minutes

### 7. Workshop #2, Embedding the PVF Into Your Strategic Plan

- Identifying top 10 institutional priorities to address postsecondary value
- Identifying top 5 institutional priorities to address postsecondary value
- Developing a goal or goals that reflect the priorities
- Developing a set of initiatives
- Developing a model
- ~60 minutes

#### Wrap-up

- Capturing the gold (significant learnings, ideas to explore and share)
- Reviewing content and connections
- Previewing tomorrow's content
- ~30 minutes

Day 2, ~8:30 a.m. – Noon (breaks and lunch included)

### 8. Train the Trainer

- Train the Trainer on Embedding the PVF Into Your Strategic Plan

### 9. Assessing and Improving Your PVF Work

- Making your lagging indicators measurable
- Making sure your strategy is solid
- Assessing outcomes
- ~45 minutes

### 10. Workshop #3, Assessing and Improving

- Answering reflection questions
- Rewriting goals
- Developing a model
- Presenting work
- ~60 minutes

### 11. Train the Trainer

- Train the Trainer on Assessing and Improving Your PVF
- ~15 minutes

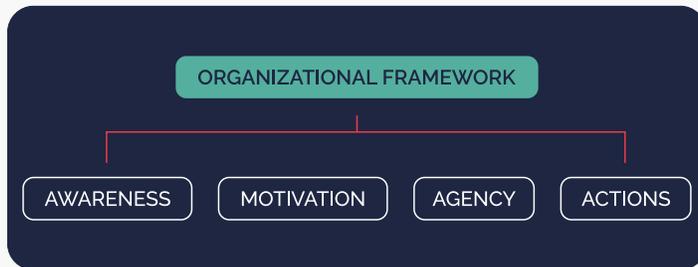
#### Wrap-up

- Capturing the gold (significant learnings, ideas to explore and share) and group sharing one key takeaway you will share with campus colleagues
- Reviewing content and connections
- Completing an after action review (what worked well, what didn't work so well and what changes might we consider making)
- ~30 minutes

On-site sessions were highly interactive and generally led to offline interactions between the participating institutions and AASCU senior consultants.

Materials throughout the on-site session were keyed to a PVF organizational framework, as depicted in Figure 4.3.

Figure 4.3: PVF Organizational Framework Used During On-Site Sessions



“The value framework has changed my awareness of my agency when it comes to address the facets of access, affordability, and completion.”  
– Comment from a strategic planning collaborative participant

As mentioned, participants included executive team members and content experts with the ability to address and effect changes in the areas of access, affordability, support, completion, earnings, and wealth. Participant feedback was collected along the way and, across the five institutions, a better understanding of the PVF was achieved. More specifically, participants gained an enhanced ability of how to address postsecondary value in their own circles of influence, more knowledge on how PVF items can be embedded in the institution's strategic plan, and increased optimism about the institution's focus on the PVF.

During the training sessions, participants appreciated reflection time, the active learning and varied delivery techniques, and train-the-trainer segments. Participants requested better use of existing internal data throughout the session as well a clearer understanding of their role moving forward in the strategic planning process.

Overall, a few representative comments related to the PVF being embedded into an institution's strategic plan illustrate what the facilitators heard from the collective set of institutions:

- “I am much more optimistic that the framework discussed will lead to a meaningful strategic plan (our most recent plan ran into a lot of obstacles).”
- “This program has been very informative and provided me with the necessary information that I could now host and educate my colleagues on PVF and how to embed [it] into the strategic plan.”
- “Thank you for the introduction to PVF. It was a first for me to learn of this framework. When I think of ‘Agency’ I think of my role to move the strategic plan and the goals forward. I am encouraged by the opportunity to collaborate with the campus across units and divisions. Let's do more of this, often.”
- “My awareness has increased exponentially, and I am more motivated to have discussions about how we can help move the needle toward our highest institutional goals.”
- “The value framework has changed my awareness of my agency when it comes to address the facets of access, affordability, and completion.”

- “I appreciated learning about this framework and having the conversation in person with my colleagues from across campus who I have either not met in person or don’t get many opportunities to see in person. It was good to take the time away from the day-to-day pressures to think more strategically about what is important for our university community, our goals, and how we want to try to get there.”
- “I’m really excited to refocus my/our work around a few top priorities and really lean into that work together. It means we may truly be able to stop doing some old practices because we simply can’t devote time to them. It will be difficult to let go, but I know now that it’s necessary. Much of the difficult work will be getting everyone moving in the same direction with as much heart as they can muster. The work itself seems very straightforward/obvious.”
- “I wasn’t aware of the Postsecondary Value Framework before this session. I am more aware now and understand that like Maslow’s Hierarchy of Needs, the process flow is very similar in that you need to meet particular needs first before you can reach the earnings and wealth endpoint.”



Credit: Stockton University (NJ)

While the PVF curriculum can be delivered by institutions desiring to embed the PVF into developing strategic plans, given the current external climate, careful attention will need to be given to the language of the PVF itself and the curriculum prepared for the Strategic Planning Collaborative. Further, the curriculum can be expanded to address overall institutional metrics coming from an institution’s strategic plan—especially those that are institutional value-based metrics.

## Embedding and Adapting the PVF

We observed that institutions can embed the PVF no matter what stage they are at in the planning development process—beginning, middle, or toward the end.

The strength of the Strategic Planning Collaborative was the varied nature of the institutions from the lenses of geography, size, student demographics, and overall institutional health. Further, the five participating institutions were at varying phases of strategy development.

Three of the institutions were at the beginning phase of the strategy development process: Bemidji State University/Northwest Technical College, Montclair State University, and Stockton University. SUNY Oswego was at the beginning-to-middle stage of its strategy development and San José State University had a strategic plan in place.

### Key Guidance



Those institutions at the front end of strategy development can use the curriculum to ensure the PVF is at the forefront of thinking during environmental analyses and making sense of inputs as well as during the strategy stages of making choices and implementation. Throughout, the institutions were able to ask what aspects of the PVF were present or missing within their strategy.

Specifically, Bemidji State University/Northwest Technical College introduced the PVF at the initial kickoff of its initial strategy development process. The institutions were then able to ask PVF-related questions through the development stage. Montclair State University took a distinctive approach to strategic planning as it developed a strategic framework focus on its mission, four priorities established for its upcoming accrediting visit, and a special focus on “next-level multipliers: a competency framework.”

The institution introduced the PVF at its initial discussions on strategy framework development and in the middle phase of that development. As such, it ensured PVF items were infused in designated competencies designed to ensure its unit-level strategy contributions will help the institution become further future-proofed. Stockton University introduced the PVF at the beginning of its strategy journey—though its leaders were clear they already had a sense of their strategic direction and used PVF learnings, like Bemidji State University/Northwest Technical College, to ask PVF-related questions along the way of its development. Stockton ensured a complete crosswalk alignment was completed.

**Those institutions at the middle stage of strategy development can also use the curriculum either as is or in slightly modified fashion to help analyze the inputs and potential selected strategies and how they address the PVF.** SUNY Oswego had a blueprint of strategy developed before it introduced the PVF. Nonetheless, the PVF served as a valuable guide for strategy leaders and participants alike as they conducted a crosswalk of strategies, initiatives, and actions with the PVF items. This can be a meaningful exercise for those institutions that have already developed a strategic plan.

**Those institutions at the end of strategy development can also conduct a crosswalk** just as SUNY Oswego did. In the case of San José State University, it chose to focus its strategic work on student success with the PVF lens. The institution requested the PVF curriculum be sensitive to the existing strategic planning language and integrated in a way that PVF items were complementary to the existing work. Thus, the PVF curriculum and workbook should be amended for those institutions with existing strategic plans. Specifically, the overall language and last half day focused on goals and initiatives may need to be altered based on an institution’s existing strategic plan.

For institutions that have little experience in addressing PVF-related items and thus are less ready for ensuring the PVF is embedded within their strategic plans, we suggest utilizing the pre-work assignment; reviewing the PVF booklet; using the full curriculum; and adjusting appropriately to the changing federal, state, and local landscapes.

For institutions that have significant experience in addressing PVF-related items and thus are more ready for ensuring PVF is embedded within their strategic plans, we suggest utilizing the prework assignment, reviewing the PVF booklet and identifying key gap areas for action and emphasis, adapting the full curriculum, and adjusting appropriately to the changing federal and local landscapes.

We also advise institutions—no matter what stage of their strategy journey or experience in addressing PVF-related items—to make sure to **include institution-based value metrics on institutional and/or strategy dashboards.**

## Key Guidance

Those institutions at the middle stage of strategy development can also use the curriculum either as is or in slightly modified fashion to help analyze the inputs and potential selected strategies and how they address the PVF.

Those institutions at the end of strategy development can also conduct a crosswalk...and make sure to include institution-based value metrics on institutional and/or strategy dashboards.



“

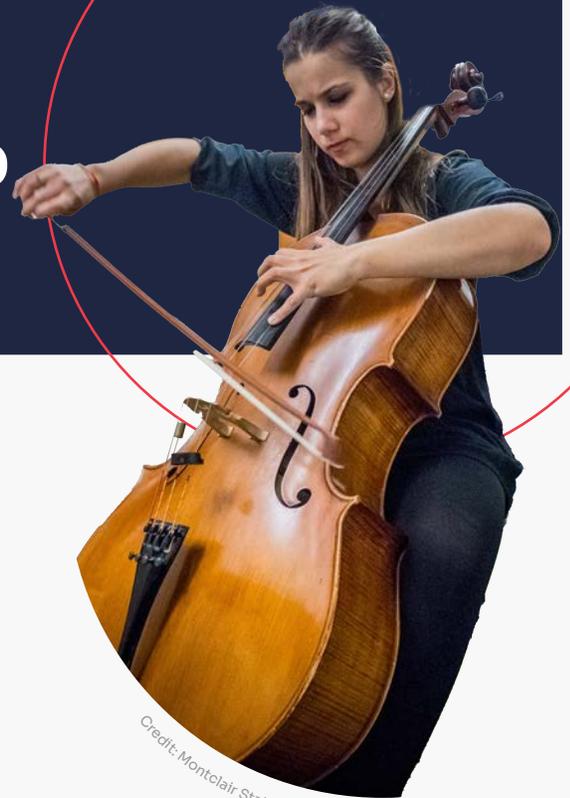
**I'm really excited to refocus my/our work around a few top priorities and really lean into that work together.**

*- Comment from a strategic planning collaborative participant*

Credit: San José State University(CA)



# Postsecondary Value Framework Workshop Effectiveness



Credit: Montclair State University (NJ)

The goal of any leadership development program is to affect change. One way to assess the effectiveness of the PVF workshops was to follow up with the five institutions to make sure that many of the PVF promising practices were eventually integrated into the institutions' strategic plans.

Since each of the five institutions were in the process of either developing a new strategic plan or revising an existing strategic plan, we examined each of the strategic planning documents in their current form for evidence that elements of the Postsecondary Value Framework were embedded into their strategic plans. See Table 5.1 for a review of best practices.

Table 5.1: Postsecondary Value Framework Promising Practices

Focus Area	Postsecondary Value Framework
<p><b>Enhance Access</b></p>	<p>Interrogate and eliminate admissions requirements that could limit access including consideration of legacy status, standardized test scores, and criminal history.</p> <p>Implement best practices in recruitment and develop robust partnerships with local schools, community colleges, and community organizations.</p> <p>Equalize access to all programs and fields of study for all students.</p> <p>Reduce barriers to enrollment for transfer students and improve credit recognition for students with transfer credits or college in high school credits.</p>
<p><b>Ensure Affordability</b></p>	<p>Allocate institutional aid toward meeting the full cost of attendance and eliminating unmet need, based on students' income and wealth.</p> <p>Address basic needs security for students and their families.</p>
<p><b>Increase Completion</b></p>	<p>Reform developmental education to strengthen pathways to completion.</p> <p>Bolster institutional supports, including robust, responsive academic advising programs, to address barriers to completion.</p> <p>Match robust advising models with additional financial assistance, including microgrants, emergency grants, and in-kind benefits (e.g., transportation vouchers, free textbooks, nutritional assistance, and child care benefits), to remove financial and nonfinancial barriers to completion in a comprehensive way.</p> <p>Strengthen students' pathways to degree completion and into careers by setting high standards for rigorous learning and offering opportunities that both expand students' minds and prepare them for success in the workplace.</p>

More holistically, we looked for the following:

- Integration of PVF best practices into existing or new university strategic plans.
- Strategic plan goals, initiatives, and/or strategies that when implemented will remove barriers to access, affordability, and completion for all students while minimizing gaps across types of students.
- Strategic plan goals, initiatives, and/or strategies that when implemented will enhance organizational culture, bringing sustained attention to access, affordability, and completion and yielding increased earnings and wealth.

In Table 5.2 below we showcase, by institution, the five institutions' strategic planning efforts—focusing specifically on how well they addressed the criteria detailed in Table 5.1 and the above three bullets. Strategic planning is an ongoing process and, as noted, each institution was at a different stage in their planning efforts.

Table 5.2 Inclusion of the PVF Into Strategic Plans by Five Institutions

Institution	Institution Commitment to the Postsecondary Value Framework as Reflected in Their Strategic Planning Efforts
SUNY Oswego	<p>The SUNY Oswego strategic plan titled "Transforming Lives, Igniting Possibilities," has three drivers: grow, connect, and thrive.</p> <ul style="list-style-type: none"> <li>• The GROW driver focuses on increasing education opportunities from access to completion.</li> <li>• The CONNECT driver focuses on transformative learning to build and lift communities.</li> <li>• The THRIVE driver focuses on building educational excellence through human connections.</li> </ul> <p>The plan includes eight goals and 18 initiatives designed to diversify enrollment pathways, ensuring that SUNY Oswego education remains accessible and affordable for all students and improves persistence and graduation rates.</p> <p>The plan reflects numerous best practices from the PVF and the overall intent of the Postsecondary Value Commission. Three specific examples are listed below.</p> <ul style="list-style-type: none"> <li>• Develop a pathways of young residents who "grow up" on SUNY Oswego's campus through summer (and other times) educational (e.g., STEM campus), arts, and recreational offerings and events.</li> <li>• Enhance the student experience by providing comprehensive academic and personal support tailored to ensure that all students complete their educational journey in a timely way and inspire them to develop and reach their goals, paying particular attention to first-generation students, low-income students, and students from historically marginalized communities.</li> <li>• Develop a five-year Strategic Enrollment Management Plan guided by Vision 4040 using an value-informed approach to identify specific enrollment goals for recruitment and retention, including persistence, completion, and graduation rates.</li> </ul>

Institution	Institution Commitment to the Postsecondary Value Framework as Reflected in Their Strategic Planning Efforts
Stockton University	<p>The Stockton University strategic plan focuses on the following five themes.</p> <ul style="list-style-type: none"> <li>• <b>People and Campus Culture.</b> This theme focuses on developing a community of care through cultivating belonging and pride. Specifically, this theme will focus on fostering engagement, personal relationships, professional development, and a supportive campus culture rooted in Stockton's ethic of care.</li> <li>• <b>Authentic Teacher/Scholar Model.</b> This theme focuses on ways to inspire students through teaching, learning, and scholarship. The initiatives supporting this theme will highlight the balance between teaching excellence and scholarly pursuits, emphasizing Stockton's unique approach to student-centered education.</li> <li>• <b>Stewardship and Sustainability.</b> This theme focuses on ways to sustain tomorrow through stewardship and innovation. The initiatives supporting this theme will reflect Stockton's commitment to sustainability, resource management, and serving as a model for responsible growth in the region.</li> <li>• <b>Student Success.</b> This theme focuses on empowering students to be successful. Initiatives will focus on Stockton's dedication to preparing students as self-sustaining, engaged citizens and a premier institution for first-generation learners.</li> <li>• <b>Community.</b> This theme focuses on the campus serving the region and beyond. The initiatives supporting this theme will emphasize Stockton's role as an anchor institution for Atlantic County and the broader region, highlighting its regional impact and community partnerships.</li> </ul> <p>The plan reflects numerous best practices from the PVF and the overall intent of the Postsecondary Value Commission. Specifically, Stockton University has a guiding principle that reflects its commitment to building a community that values differences of race, religion, gender, ethnicity, national origin, socioeconomic status, affectional or sexual orientation, gender identity or expression, marital or family status, age, and ability or divergent abilities.</p> <p>Specifically, the plan says, "We accept our responsibility to challenge prejudice and discrimination through actions that foster an inclusive, diverse, equitable environment for students, faculty, staff and supporters. Recognizing and understanding the significance of our similarities and differences will ultimately cultivate an ethic of care, enriching the individual, the campus, and the community at large."</p> <p>The Stockton University plan includes a goal focusing on retention by creating pathways to improve engagement, accessibility, transparency, and accountability for students, faculty, and staff. To make the goal a reality, several initiatives are planned to be implemented: reduce barriers to accessibility by improving teaching and learning resources; develop pathways that support campus climate and program enhancement across the university; celebrate achievements and shared experiences to build pride and belonging; and keep faculty and staff engaged through recognition and support (e.g., employee resource groups, performance review processes).</p>

Institution	Institution Commitment to the Postsecondary Value Framework as Reflected in Their Strategic Planning Efforts
<p><b>Montclair State University</b></p>	<p>The Montclair State University strategic plan is in process and will focus on four institutional priorities (goals) and a set of emerging initiatives. The four goals are optimize student success, drive academic excellence and innovation, fortify institutional vitality, and scale up impact and research.</p> <p>To support the emerging plan, Montclair is investing in an innovative competency framework called Next-Level Multipliers that will allow it to become a premier learning organization with enhanced organizational capacity and adaptability, equipping leaders at every level to proactively respond to emergent marketplace changes and needs enabling Montclair State University to reach its four institutional goals.</p> <p>The framework includes nine competencies: effective communication, organizational oversight, emotional intelligence, strategic mindset, situational adaptability, innovation, managing complexity, effective team building, and collaboration. The framework includes a set of learning experiences that leaders can engage in to develop desired competencies using a 70:20:10 model of learning where 70% of the learning is experiential, 20% is social, and 10% is formal.</p> <p>The Next-Level Multipliers competency framework has been vetted against the PVF with the institution's leaders who are committed to this work.</p> <p>The institution is currently developing action plans to address the four goals. The emerging action plans will include many of the best practices recommended by AACSB for moving the dial on access, affordability, completion, and economic mobility.</p>
<p><b>Bemidji State University/Northwest Technical College</b></p>	<p>The Bemidji State University/Northwest Technical College strategic plan is in process and is expected to focus on the following emergent themes: academic innovation and workforce prepared; people, culture, and brand; regional engagement; and infrastructure.</p> <p>Although under consideration, the institution is examining a set of common initiatives to enhance each of these institutional priorities by focusing on enrollment, retention, and completion across all priorities. In both focus group and survey data of stakeholder groups, expanding financial aid, providing degree pathways and enhanced academic advising, and career preparation are amplified discussion threads that are anticipated to influence the development of the strategic plan.</p>

Institution	Institution Commitment to the Postsecondary Value Framework as Reflected in Their Strategic Planning Efforts
<p style="text-align: center;"><b>San José State University</b></p>	<p>San José State University's strategic plan "Transformation 2030" has several goals and initiatives that map to the PVF. Specifically, Goal 1 focuses on attracting unique and exceptional students, faculty, and staff to actively engage in a teaching, learning, and research environment supporting their interests as creators, innovators, change agents, and champions of the social good in a changing world.</p> <p>The plan reflects numerous best practices from the PVF and the overall intent of the Postsecondary Value Commission. Seven specific examples are listed below.</p> <ul style="list-style-type: none"> <li>• Support faculty research and scholarship that advances knowledge and addresses societal challenges (implicit in Goal 1, but worth emphasizing)</li> <li>• Career readiness, leadership development, and postsecondary success</li> <li>• Equip students with essential skills for success in a rapidly evolving workforce (e.g., adaptability, communication, problem-solving, leadership )</li> <li>• Offer robust career services, including experiential learning opportunities, internships, and mentorship programs</li> <li>• Increase student enrollment, retention, and graduation rates</li> <li>• Cultivate a campus culture that supports holistic student development, including personal well-being, sense of belonging, self-awareness, and healthy lifestyles</li> <li>• Build strong partnerships with industry, alumni, and community organizations to enhance student learning, research opportunities, and career pathways</li> </ul> <p>At the time of this writing, the plan was undergoing a revision, but Goals 2–5 covering, generally, academic excellence, a caring community, local and global connections, and a flourishing infrastructure each included initiatives connected to PVF elements.</p>



Credit: Stockton University (ND)

**“**The PVF materials and workshops allow for reflection time, active learning, train-the-trainer segments, and varied delivery techniques and, as such, are transferable to institutions at any readiness stage.

# Lessons Learned

What follows are lessons learned about the Postsecondary Value Commission's Postsecondary Value Framework (PVF), strategic planning, and leadership related to organizational readiness.

## Postsecondary Value Framework

1. The original work and intent of the Postsecondary Value Commission remains vital today. Performance gaps, student success for all, the value of higher education, and other key constructs continue to be relevant in 2025 and beyond. Given the rapidly changing higher education environment as of fall 2025, the commission's work should remain a beacon for the sector.
2. The PVF elements (access, affordability, support, completion, earnings, and wealth for all students) are relevant for institutions to use as a construct.
3. The PVF materials and workshops allow for reflection time, active learning, train-the-trainer segments, and varied delivery techniques and, as such, are transferable to institutions at any readiness stage.
4. Connecting PVF participant learnings and takeaways to actual strategic planning content is crucial. PVF materials and the structured workshops can yield an enhanced strategic plan focused on postsecondary value.
5. Although most institutions scored slightly above the average on the Organizational Readiness for Change Assessment (ORCA) instrument, the areas of concern clustered around their organizational culture being ready to sustain the change recommended by the PVF, their ability to resource the changes needed, and their confidence in developing and implementing strategic plans.
6. Staff members scored the items comprising the ORCA significantly lower than executive leaders, administrators, and faculty did. Since staff members will be responsible for implementing much of the change recommended by the PVF, the data suggest that they will need additional support.
7. The PVF curriculum can be used by institutions desiring to embed the PVF into developing strategic plans and existing strategic plans. Those institutions at the front end of strategy development can use the curriculum to ensure the PVF is at the forefront of thinking during environmental analyses and making sense of inputs as well as during the strategy stages of making choices and implementation. Those institutions at the middle stage of strategy development can also use the curriculum either as is or in slightly modified fashion to help analyze the inputs and potential selected strategies and how they address the PVF. Those institutions at the end of strategy development can also conduct a crosswalk to ensure PVF items are complementary to the existing work.



Credit: SUNY OSWEGO State

8. Institutions—no matter what stage of their strategy journey or experience in addressing PVF-related items—should include institution-based value metrics on institutional and/or strategy dashboards.
9. In addressing PVF issues, involvement of executive team members and content experts with the ability to address and effect changes in the areas of access, affordability, support, completion, earnings, and wealth is paramount. Use of the PVF curriculum enhances understanding related to how to address postsecondary value in personal circles of influence, more knowledge on how PVF items can be embedded in the institution's strategic plan, and increased optimism about the institution's focus on the PVF.
10. To keep a sustainable institutional strategic focus on the PVF, institutions can revisit the PVF curriculum annually.

## Strategic Planning

1. From a process point-of-view, many variations exist, but no matter what, the institution should develop a robust, yet meaningful, internal and external involvement strategy and must be agile in terms of process steps and refinement.
2. Take time to "talk strategy" with an array of internal and external stakeholders—readying them for the process, socializing them to current and possible future conditions, and outlining the process ahead.
3. Strategic plans tend to be a mix of bettering operations (infrastructure) and some larger strategic changes—ensure you articulate your desire and the balance of steadying the current state of operations and visionary strategic changes.
4. Institutions must be ready to align expenses with revenues and be prepared to say no to pet projects, good ideas, and shiny objects during strategy development—strategy is about making choices and mapping investments to the budget.
5. Strategy is not only about making choices, but about leverage, change, and time—be ready to pivot if stuck, be ready to both smooth out infrastructure and seize new opportunities, and be able to recognize signals (small and seismic) ahead. Above all, develop a focused strategy in a timely manner and focus on execution across the institution.
6. Strategic drivers can be a sound mechanism to reflect on where the institution desires to go and strategic threads can help articulate the larger changes desired and an overall strategic position.
7. Describe and address the need for strategic thinking by a multitude of leaders, the role of shared governance, and the use (and overuse) of data.
8. Seek accountability for performance related to the strategic plan that is clear and compelling.
9. Showcase examples of strategic successes from everywhere around the organization.

## Leadership

1. There must be a willingness and commitment from leadership (broadly defined) to implement and manage change.
2. Leaders must be attuned to and help shape the institution's culture related to the PVF, strategic planning, and change.
3. Leaders should be able to make decisions about focusing strategy and using the PVF as a guidepost.
4. Leaders should be involved in PVF proceedings and serve as steadfast champions for postsecondary value.

# Resources

## Appendix A

[The Postsecondary Value Commission's Action Agenda](#)

## Appendix B

[Helping Universities Ensure the Value of a College Degree for All Students](#)

## Appendix C

Promising Practices for Accessibility, Affordability, and Completion



Credit: San José State University (CA)

### Accessibility

Your institution meets the full cost of attendance and eliminates unmet need, based on students' income and wealth, instead of awarding aid based on non-need factors, like GPA, standardized test scores, or high school ranking.

Your institution meets the food/shelter/clothing (security) needs of your students.

Your institution provides scholarships to supplement state grants by covering the remaining costs of housing and fees.

Your institution provides need-based grants that cover full tuition and fees after applying Pell Grants and state grants.

Your institution provides microgrants to students for good academic standing who are close to graduating but unable to pay their last tuition bill.

Your institution provides emergency scholarships for personal hardships to help retain students once enrolled.

Your institution provides a discounted tuition rate to students in specified majors.

## Affordability

Your institution meets the full cost of attendance and eliminates unmet need, based on students' income and wealth, instead of awarding aid based on non-need factors, like GPA, standardized test scores, or high school ranking.

Your institution meets the food/shelter/clothing (security) needs of your students.

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Your institution provides emergency scholarships for personal hardships to help retain students once enrolled.

Your institution provides a discounted tuition rate to students in specified majors.

## Completion

Your institution reforms general education courses with high failure rates by adding tutors, mentors, and/or supplemental instruction.

Your institution strengthens students' pathways to degree completion and into careers by setting high standards for rigorous learning and offering opportunities that both expand students' minds and prepare them for success in the workplace.

Your faculty provides students with substantial feedback from an assignment early in the semester allowing students to drop/add without adding additional time and cost to degree completion.

Your institution offers "accelerated" bachelor's degrees, providing affordable access to students who can complete degrees on a reduced timeline in high-demand fields.

Your institution strengthens students' pathways to degree completion and into careers by setting high standards for rigorous learning and offering opportunities (e.g., paid internship opportunities and apprenticeships) that both expand students' minds and prepare them for success in the workplace.

Your institution leverages data assets, develops a culture of data use, and creates systems dedicated to using data to identify and remedy gaps in enrollment, completion, and value.

Your institution bolsters institutional supports, including robust and responsive academic advising programs and integration of academic and career advising to assist students in discerning their vocational path.

Promising Practices Sources:

[\*Postsecondary Value Commission. \(2021b\). Ensuring equitable postsecondary value: An action agenda.\*](#)

[\*American Association of State Colleges and Universities. \(2022\). Ensuring affordability: AASCU institutions' practices and policies.\*](#)



Credit: Bemidji State University (MN)

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