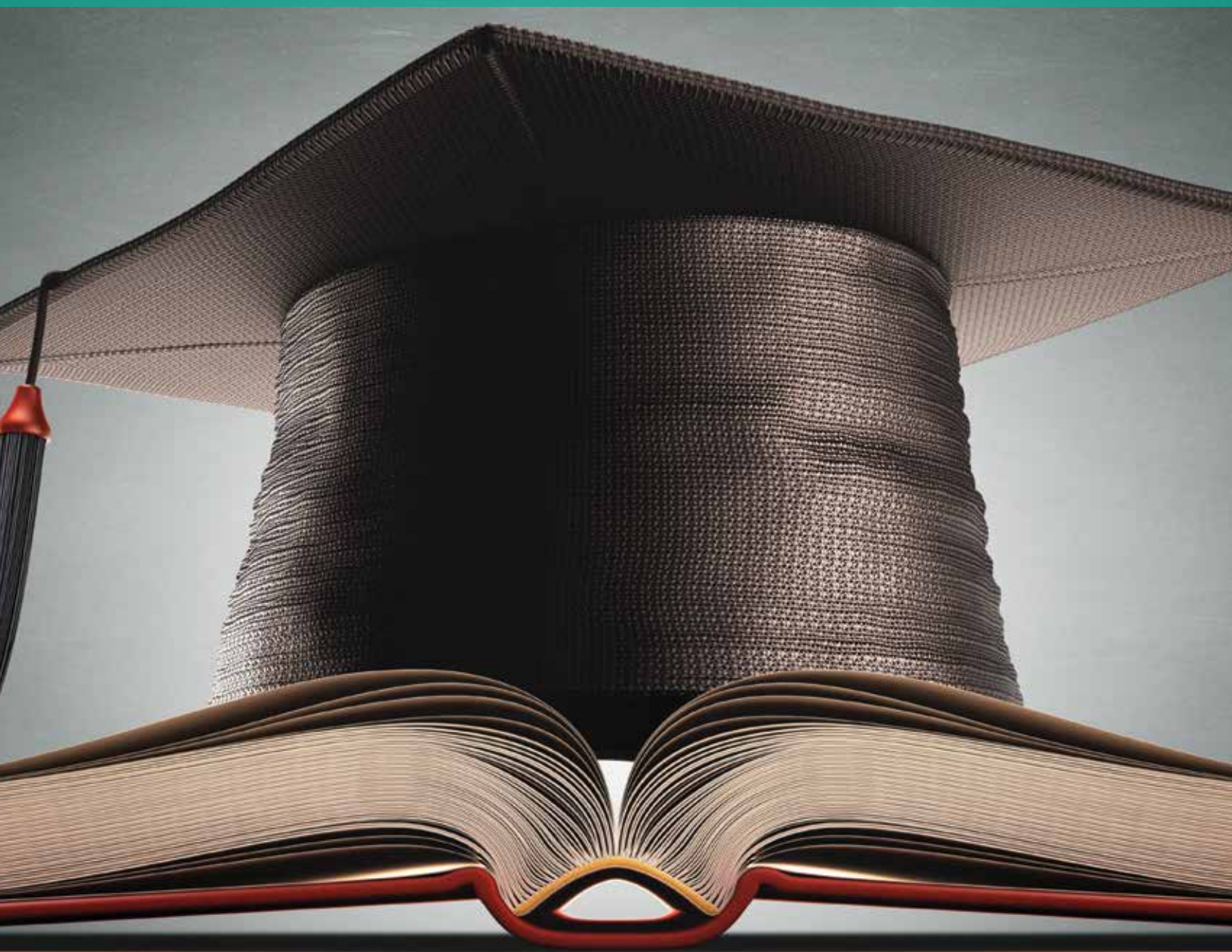




INVESTING IN THE FUTURE:

LESSONS ON ADVANCING INSTITUTIONAL EFFECTIVENESS
FROM HISTORICALLY BLACK COLLEGES AND UNIVERSITIES



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OVERVIEW

With generous support from the Andrew W. Mellon Foundation, the Southern Education Foundation (SEF) engaged a group of 13 Historically Black Colleges and Universities (HBCUs) in a study of institutional effectiveness. The purpose of this study was to 1) identify the issues related to capacity and institutional practice that contribute to overall campus effectiveness 2) and to understand what, and how, an initiative could support institutional effectiveness for the group of HBCUs receiving direct support from the Andrew W. Mellon Foundation. The research project addressed the following questions:

1. What is the data capacity of the institutions?
2. What opportunities exist for cooperative arrangements/agreements with partnering HBCUs or non-HBCUs?
3. What is the relationship between admissions/enrollment and overall institutional effectiveness?
4. How do curricula offerings and strategies impact campus effectiveness and student outcomes?

To answer the research questions, the SEF team engaged in a mixed methods research study of the 13 participating HBCUs (see below).

- | | |
|--------------------------------|----------------------------|
| 1. Bennett College | 8. Morehouse College |
| 2. Claflin University | 9. Morgan State University |
| 3. Clark Atlanta University | 10. Spelman College |
| 4. Dillard University | 11. Tougaloo College |
| 5. Fisk University | 12. Tuskegee University |
| 6. Howard University | 13. Xavier University |
| 7. Johnson C. Smith University | |

The first phase of the research process involved securing an agreement to participate in the study, identifying a key contact person, and obtaining approval from the institutional review board (IRB) at each campus. Next, the SEF research team designed and distributed an online survey instrument that asked both multiple-choice and open-ended questions about the areas critical to institutional effectiveness such as institutional data capacity and use (see appendix A for the full survey). Respondents were asked to identify their department as either Academic Affairs, Business and Finance, Institutional Assessment/Effectiveness/Research (IEAR), Student Affairs or Other. After analyzing the data, we found a number of participants entered “Institutional Advancement” in the “Other” category, which led us to code and separate their responses from the remaining “Other” responses. The survey was distributed to key institutional leaders that included senior level practitioners (assistant director level and above), faculty and administrative faculty (deans and department chairs) who address curricular issues, admissions/enrollment management, institutional research/effectiveness/assessment, collaborative arrangements, and business and finance. Response options for the multiple choice questions were either (a) Never, Rarely, Sometimes, Often and Always or (b) Very Ineffective, Somewhat Ineffective, Neither Ineffective Nor Effective, Somewhat Effective and Very Effective. Leaders from each of the 13 campuses responded, for a total of 68 completed surveys.

The second phase of the study involved convening HBCU leaders in Atlanta, Georgia to discuss the issues most critical to advancing institutional effectiveness at their campus. Twenty campus leaders from 11 of the participating HBCUs attended the convening. The participants represented diverse areas of their campuses including institutional research, academic affairs, grants management, institutional advancement, and student affairs. The participants engaged in large group discussions and small focus groups led by the SEF research team. During the focus groups, the participants were asked questions about collaborative arrangements, the use of technology in admissions and enrollment management, and curricular decision-making. The convening concluded with a discussion of the types of initiatives that could be most impactful for supporting the success of their students and institutions.

After the convening, the SEF research team transcribed the recorded convening activities and analyzed the focus group and survey data using a constant comparison analysis approach. The researchers used Atlas Ti software to generate codes, categories, and themes based on the research findings. SPSS software was used to provide descriptive statistics and cross-tabulations to identify similarities and differences in the data based on several characteristics. The major findings from the analysis regarding curricular matters, the use of technology in admissions and enrollment, and collaborative agreements are provided below.

FINDINGS

CURRICULAR MATTERS

HBCUs, like other institutions, consider institutional data, student course enrollment, and the desire to impact the community as the primary internal influences on curricular matters. In the interest of obtaining data from various perspectives, the participants were asked questions about the use of data in curricular matters in both the online survey and in the focus groups. Survey analysis indicated that the HBCU campuses generally use data and technology to make decisions. We asked respondents how often (“never,” “rarely,” “sometimes,” “often,” or “always”) they used data in curricular matters and 75% (N=35) answered “often” and “always” (see tables 1 & 2 below).

TABLE 1: How often do you use institutional data for the curriculum?

How often do you use institutional data for the following? Curriculum	Never	Rarely	Sometimes	Often	Always	Total
Count	0	4	8	17	18	47
%All Departments	0.0%	8.5%	17%	36.2%	38.3%	100%

In order to gauge how often the universities were using technology in curricular decisions, we asked participants “How often do you use technology in the following areas?” In this instance, 75% (N=36) of respondents indicated that they used technology “always” and “often” to make curriculum decisions.

TABLE 2: How often do you use technology for the curriculum?

How often do you use technology for the following? Curriculum	Never	Rarely	Sometimes	Often	Always	Total
Count	1	2	9	16	20	48
%All Departments	2.1%	4.2%	18.8%	33.3%	41.7%	100%

Continuing along the lines of curricular decisions, we also asked survey respondents to rate the effectiveness of technology regarding their course management system. Focusing on Academic Affairs (as they are most likely to use the course management system), we found that 73% (N=22) of Academic Affairs respondents rated it as “effective” and “very effective” (see Table 3).

TABLE 3: How would you rate the following technology: Course Management System?

How would you rate the following technology? Course Management System	Very Ineffective	Ineffective	Neither effective nor ineffective	Effective	Very Effective	Total
Count	1	0	7	12	10	30
% Academic Affairs	33.3%	0%	23.3%	40.0%	33.3%	100%

We then asked participants to rate the effectiveness of technology in the classroom. Again, Academic Affairs rated it positively, with 77% (N=24) answering “effective” and “very effective.”

TABLE 4: How would you rate technology in the classroom?

How would you rate the following technology? Technology in the Classroom	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective	Total
Count	1	2	4	17	7	31
% All Departments	3.2%	6.5%	12.9%	54.8%	22.6%	100%

“We started looking at the students who were leaving the university, their major, and said, ‘what can we do to give them an alternative?’ These kinds of questions are illustrative of the type of proactive conversations that occur regularly as faculty and administrators increasingly rely on data to implement strategies that strengthen students’ ability to graduate.”

Institutions' use of data in curriculum decision making varies by campus and was discussed in detail during the focus group discussions, which were guided by the following questions:

- 1. What institutional processes influence curricular decisions?**
- 2. What other factors influence curricular decisions?**
- 3. Can anyone share the ways that students influence an institution's curricular decisions?**
- 4. In what ways do you use institutional data in regard to curricular matters?**

When asked, "What institutional processes influence curricular decisions?" assessment-driven activities was the most common answer. Activities such as program reviews and curriculum mapping, coupled with outcome measurements such as graduation, recruitment, and transfer data were mentioned most often among focus group members. Program reviews, the participants explained, is essentially designed to help institutions gauge their academic programs' strengths and areas for improvement. The process typically entails collecting data on course enrollment, retention and graduation rates, number of students in a major, employment data, etc., to provide a holistic picture of an academic program's viability. Departments conduct a self-study and the results are also reviewed by external peers and experts in the field. Focus group members described this as a process to monitor the quality of the program and the extent to which its student learning outcomes are being realized. Based on comments from the focus groups, the faculty use the data to determine whether to continue a program, put an action plan in place to monitor its growth and contribution to the institution or discontinue the program. In these economically challenging times, participants indicate that they have become more and more reliant on data to make difficult decisions about program closures.

By using program review to assess the extent to which students learn as intended in the major, faculty can also gauge whether the program is effectively reaching its goals of educating and graduating students who are prepared for the workforce. Curriculum mapping was described as the process of identifying where each program goal is touched upon in each course. This exercise provides a visual representation of how well each goal is covered across a student's curriculum. It is important because it ensures that students are exposed to certain principles and theories throughout their academic career. Program reviews highlight the strong, average, and under-performing programs. Student learning outcomes assessments identify the programs that excel at helping students absorb, apply, and create knowledge. Placement scores inform faculty members working to ensure incoming students are placed in courses that will give them a firm foundation.

Focus group members shared examples of ways that program review data also facilitated the development of new programs, creation of degree partnerships or articulation agreements with community colleges as well as an overhaul of the general education curriculum. At one institution, the data revealed that a noticeable number of students were unable to meet the requirements of a particular major. After reviewing the data, faculty created a new, closely-related major to capture the students who were able to transfer their credits and still receive a degree in the field they enjoyed. This process began because (as the participant explained), "...We started looking at the students who were leaving the university, who are majoring in those science fields and said, 'What can we do to give them an alternative?'" These kinds of questions are illustrative of the type of proactive conversations that occur regularly as faculty and administrators increasingly rely on data to implement strategies that strengthen students' ability to graduate.

Focus group members were also asked to share other influences on curriculum matters and "student characteristics" came to the forefront. Participants explained that incoming students' levels of academic preparedness impacted curriculum decisions as well. Examples included placement tests scores, developmental education needs, and rigor of the high school curriculum. HBCUs serve students with a wide range of academic achievement, thus these institutions are accustomed to arranging resources in ways that enable them to provide rigorous courses while also providing comprehensive support and developmental opportunities.

Rigor of high school courses also affected curriculum decision making in the institutions. One faculty participant explained that students were being asked to write a five-page paper and then realized that the students had never been required to do this in high school. The faculty member explained how they also realized that some students' writing skills were underdeveloped. After further conversations with the students (and faculty members' conversations with school teachers), they learned that students had been given "review sheets." This exercise, primarily required students to select an answer, rather than write or respond to a prompt. Consequently, faculty realized they were asking students to exercise a muscle they hadn't truly been asked to use. The faculty member went on to explain that rather than considering this scenario as an impediment, they considered it as an opportunity to frame the college experience – through the curriculum – in ways that would enable them to have the greatest impact on students' growth. Reviewing the data and information related to students' writing challenges enabled the institution to make an informed decision about the proper interventions.

Student demand is yet another factor that shapes curricular decisions and typically reveals itself via high course demand and high demands for certain majors. In several conversations across three focus groups, the participants were in consensus that burgeoning enrollment in certain courses can also lead to conversations about a new concentration or major. In this process, the faculty use trend data (collected over several years) to monitor the enrollment and engage in curricular discussions about future academic possibilities. One participant offered, "Well, I think one thing that drives our curriculum – and our curriculum changes – is career planning. Because when we do our freshman seminar, we survey the students and the top things they care about ...they said...career opportunities and job track...So I think that's probably the number one driver for us right now is trying to figure out how to make the courses that you offer feed into some kind of career track." Some universities also use personality assessments to help students gauge their interest in majors and careers (and thus, certain programs and courses), which is followed by various types of exposure to useful information in ways that help students make informed decisions.

Lack of reliable data on student demand, lack of faculty resources to respond to student demand and academic programs, financial resources for curriculum or program development, and human resources to support program roll out and continued support. As one participant expounds, "You know, there's a whole lot that goes into the design of curriculum...It's not just the idea, but the finances behind it. Do we have the people? How many? And if you bring me on a grant, how long is the grant? What happens when the grant ends and do we have the money to support that person? I think there are many factors that determine that." This sentiment was commonly expressed by participants who shared their desire to maximize institutions' impact on students, if only they had adequate resources.

Overall, participants explained that student demand, both incoming and current, should and for the most part does drive curriculum matters. However, they noted resources, both financial and human, as the most significant detriments to curriculum development. Participants commented when they are able to get data about student demand, they often aren't able to adequately use data to develop new programs or courses as current faculty are already teaching large course loads, faculty recruitment is slow or nonexistent, and budget for the program development is often not available. To compensate for these barriers to success, universities are applying for grants or developing collaborative arrangements in identified areas. However, even in those solutions, the process of securing adequate human resources to assume accountability for program success is still an issue.

“HBCUs serve students with a wide range of academic achievement, thus these institutions are accustomed to arranging resources in ways that enable them to provide rigorous courses while also providing comprehensive support and developmental opportunities.”

THE USE OF TECHNOLOGY IN ADMISSIONS AND ENROLLMENT MANAGEMENT

With an adequate technological and data infrastructure, HBCUs believe they can cast their admissions and enrollment management nets wider and deeper. When discussing admissions and enrollment strategies, the participants often focused on the role of technology. According to survey results, 86% (N=42) of respondents across all departments use technology “always” and “often” in admissions and enrollment management matters.

TABLE 5: How often do you use technology in Admissions and Enrollment Management?

How often do you use technology in the following? Admissions and Enrollment Management	Never	Rarely	Sometimes	Often	Always	Total
Count	1	1	5	14	28	49
% All Departments	2.0%	2.0%	10.2%	28.6%	57.1%	100%

The admissions process is described by one participant as “a ‘funnel,’ one that begins with – for example – 8000 requests for information, 4000 requests for applications, 1300 completed applications, 500 admits and ends with 300 actual enrollees.” HBCUs long ago realized that technology was the key to strengthening their competitive edge when increasing the size of their funnel, enrolling talented students, highlighting the strengths of academic programs and presenting an appropriate online presence to potential applicants. The focus group participants discussed the ways their institutions use technology in admissions and enrollment management as well as the impact on their capacity to effectively engage with students through various points in their academic career.

Like most institutions, HBCUs are strategic in using various social media outlets to reach targeted audiences. The participants seemed keenly aware of the ways that certain demographics use various social media platforms such as Facebook, Twitter, Instagram, etc.. More specifically, a few focus group members shared their realization that millennials use social media differently than generations X and Y. Since social media is one of the technological advances that HBCUs use to initiate and maintain contact with students and their families during the admissions phase, staff found

it necessary to communicate with the two groups in parallel, yet distinct ways. For example, several focus group participants noted that students expect instant and ongoing communication, especially after submitting an application. To explain the intense and frequent touch needed in admissions, one focus group participant used football coaches as an analogy. He explained that when a football coach wants to recruit players, s/he is on the players’ Twitter and Facebook accounts, has access to their phone numbers, and they are constantly in touch because they want the player on their team. This is the strategy that some participating campuses employ, as echoed by others in the focus group who commented that they typically used Twitter to communicate with students, while using Facebook and email to communicate with parents. The formats, particularly Twitter, encourage real-time dialogue between the students and the institution as well as among students themselves. One school described how enrolled students (presumably students working with admissions) share their stories with and answer applicants’ questions via Facebook. This is important, the focus group member explained, because an enrolled student may have an experience similar to the applicant, something that enables an applicant to realize the institution is a good fit.

Technology was considered, among participants, as a means of leveling the competitive playing field for recruiting talented students. Focus group members’ reliance on technology was very obvious, particularly during discussions about the various student information management (SIS) software (e.g., Banner, Jenzabar or PeopleSoft) used on each campus. Similar to other colleges and universities, these institutions rely upon the student information systems to administer a smooth admissions operation, one that makes it easier for students to decide which college to attend.

Focus group participants also described how technology (via the National Student Clearinghouse) is used to track students who “stop out” (i.e., leave for a semester) or leave the institution entirely.

“We’re using this data for student follow-up and to get a better handle on where students go when they leave. I don’t mean when they graduate, but when they stop out. When they stop out, if they end up going to another institution in the state or somewhere else in the country. So, we provide our student data to them with our identifying information and then that student ends up being tracked to wherever they land, hopefully. So, whether that’s through the Department of Labor, through the National Student Clearinghouse, Social Security Administration, whatever all the partners that are involved. So that will help us too, when we start getting our reports back we will be able to use that data to make some better decisions about student follow-up and how we manage our students in terms of when they leave and what happens to them.”

Users take advantage of the technology to determine where students eventually earn degrees, so that they can still ‘claim’ the student in terms of degree attainment, even if only for internal purposes. The technology benefits the institutions during the admissions process because it enables them to quickly and efficiently establish relationships with students that would otherwise take months.

Software such as Starfish and DegreeWorks, along with Banner, Jenzabar and PeopleSoft’s advising and other modules are also used to make a difference in the ways that institutions interact with and monitor students’ progression through the academic pipeline. The software’s modules allow campuses to easily list their academic programs and courses on their website for all to see. This was especially important for the HBCUs with strong adult student numbers, because this population is more likely to have jobs and families. Having access to the appropriate technology enables institutions to provide easy access to academic and other information, rather than requiring an adult student to use his/her limited time to physically visit the campus. With today’s technology, HBCUs benefit from increased enrollments especially in this particular demographic group.

92% (N=47) of the survey respondents across all departments indicated they “always” and “often” use data in admissions and enrollment management matters.

TABLE 6: How often do you use data in Admissions and Enrollment Management?

How often do you use data in the following? Admissions and Enrollment Management	Never	Rarely	Sometimes	Often	Always	Total
Count	0	2	2	13	34	51
% All Departments	0.0%	3.9%	3.9%	25.5%	66.7%	100%

“For the participating HBCUs, technology is both a facilitator and barrier of success in managing students’ movement through the admissions and enrollment management process.”

The results underscore the notion that data gleaned from technology is immensely beneficial for faculty and staff. Focus group participants indicated that they use the data to monitor and track the application process and conduct further analyses to identify relationships between students' characteristics and their potential to succeed at the institution. Once students' standardized placement scores are entered into the student information system, the university uses the data to assign students to courses depending on their areas of need (e.g., higher or lower levels of Math and English, etc.). Since enrollment management typically covers retention-based efforts, the technology provides data that can be used to help students in need of academic and other assistance. During their matriculation, students' advisors enter various pieces of information via various versions of advising and retention software (e.g., Starfish, DegreeWorks, etc.) to facilitate timely degree completion goals. The data enable faculty and staff to identify students' areas for improvement, implement a plan for addressing the shortcomings, and hopefully retain the student until they graduate.

For the participating HBCUs, technology serves as both a facilitator and barrier of success in managing students' movement through the admissions and enrollment management process. The entire process, from beginning to end, is often hampered by the need for an inordinate amount of human resources and can require a seemingly perpetual, never-ending fiscal commitment. Participants' stories about wanting to expand their reach and impact were peppered with concerns about the factors that impeded their progress on realizing such lofty goals.

Naturally, the cost was the most prevalent barrier regarding the capacity to maximize the use of technology in admissions and enrollment management. Although the HBCUs members are proud of their work and aspire to do even more, their budgets continually struggle to maintain pace with the ever-changing (and increasingly expensive) technological landscape. Focus group participants talked about having to purchase as select modules of Jenzabar, Banner or PeopleSoft that they could afford rather than purchasing all of the modules they needed. They also discussed their challenges with managing the continuous module updates, which require additional funds and training.

The group was also entirely in consensus about the need for ongoing professional development. Along with the expense of remaining current with the technology, additional funds are necessary to ensure that all users remain proficient in their use of the various software. A few schools identify and train "module managers," who then train their colleagues. While this is the most efficient professional development model, it still requires funds and dedicated staff to keep an entire institution continually trained in the multiple technological formats available on any given campus.

Another cost issue is related to the need for adequate infrastructure, an issue which all of the participants agreed is in need of urgent attention. One focus group member described how their technology often fails during the height of the admissions season due to the university's need for additional bandwidth. Throughout the technology discussion, several participants offered

that additional staff could also alleviate the inadequacies that they experience. For example, when new equipment is purchased, installment can sometimes stall because of the limited number of IT staff, competing institutional technology priorities, and lack of access to experts in certain areas.

In addition to expressing the need for supplementary infrastructure, most focus group participants talked about the goal to become even more strategic in their use of technology and data regarding admissions as well as enrollment management matters. There was a lively discussion about the need to clarify the role of technology – i.e., identifying potential recruiting markets, determining the best ways to place students into courses, etc. – versus the institution’s technological capacity – i.e., ability to purchase all modules of a software program, ability to hire and retain appropriate levels of IT staff, etc.. These types of discussions, the focus group members assert, must be taken on by strong

institutional leadership who are qualified in their field. In the participants’ opinion, the leadership also needs to adjust the institutional culture by sending a message that all are expected to embrace the use of technology and that the use of data in decision-making is also expected.

Culturally speaking, participants were proud of their strength and accomplishments in the face of adversity. They celebrated the artifacts of HBCU success such as the placement of minorities in many fields where they are historically under-represented. They are proud that even though their resources are not comparable to Predominately White Institutions (PWIs), they nevertheless make an impact with the resources they have. They also admit that these accomplishments are tempered by a culture in which there are some pockets of resistance to sharing data among colleagues as well as a lack of awareness regarding which data exists.

TABLE 7: How often do you use data in budgetary decisions?

How often do you use data in the following? Budgetary Decisions	Never	Rarely	Sometimes	Often	Always	Total
Count	3	3	11	19	29	51
% All Departments	4.6%	4.6%	16.9%	29.2%	44.6%	100%

These numbers are adequate; however, they also show that in most instances, at least one-fourth of participants “rarely,” “sometimes,” or “never” use data in budgetary decision-making. While participants acknowledged how easily – in practical terms – this could be remedied, they conversed about the role of leadership in actually embedding informed decision-making into the culture. This, the group feels, is an issue that must be initiated by upper administration and built into the institution’s accountability structures.

COLLABORATIVE ARRANGEMENTS

HBCU collaborative agreements are especially impactful for transfer students from community and technical colleges, students in the local community and beyond as well as Science, Technology, Engineering and Math (STEM)-related majors. Whether the collaborations are developed due to internal or external pressures, the participating HBCUs have exponentially strengthened their partnerships both outside and within the campus walls. These types of initiatives enable the campuses to showcase their capacity, as gap-fillers, to provide a quality education that meets the needs of a diverse group of students and constituents. The stories below are supported by the survey data, which show that 72% (N=42) of survey respondents indicated that they “always” and “often” use data in collaborative agreement matters. Delving deeper into the data, 100% (N=5) of the Institutional Advancement respondents answered that they “always” use data regarding collaborative agreements, while 73% (N=22) of Academic Affairs answered “always” and “often.”

TABLE 8: How often do you use data in collaborative arrangements?

How often do you use data in the following? Collaborative Agreements	Never	Rarely	Sometimes	Often	Always	Total
Count	2	3	11	20	22	51
% All Departments	3.4%	5.2%	19.0%	34.5%	37.9%	100%

The participants explained that “Memorandums of Understanding (MOUs)” and “articulation agreements” are the primary terms used to describe collaborative agreements. These are documents that outline the ways that both institutions will contribute academic, human, physical and fiscal resources to the partnership. The most prevalent type of articulation agreement is that of collaborations between the HBCUs and community and/or technical colleges within and beyond the community. Several focus group members shared examples of transfer articulation agreements that facilitate a student’s seamless transition from a community/technical college to a four-year institution with the goal of earning a baccalaureate degree and beyond. The benefit of such collaborative agreements is that they are able to carry most (if not all) of their credits to the four-year institution, thus saving a significant amount of money and time. Based on the focus group feedback, HBCUs benefit because they are able to enroll students into some of their strongest degree programs and reap the financial benefits.

While HBCUs, like many other institutions, have been administering these types of initiatives for years, recent

state-sponsored initiatives have also impacted the role that HBCUs play in helping community/technical college students obtain a bachelor’s degree. The governor of Tennessee launched a free community college tuition initiative, a model that has since been adopted by several states and the White House. HBCUs have intentionally placed themselves as ready institutions prepared to take advantage of what academia considers “low-hanging fruit,” a phrase referring to the easily accessible students who may be efficiently converted into graduates via the HBCU. Creating environments amenable to helping such students capitalizes on a mutually beneficial relationship for both student and the institutions involved. Focus group participants offered examples of the ways their institutions prepared to receive the floodgate of potential new students. In some instances, the HBCUs were proactive in overhauling their general education curriculum to ensure alignment with that of community and technical colleges. Institutions were also intentional in establishing relationships with the faculty from these institutions, with the goal of increasing their familiarity with the HBCUs and their academic offerings. Another institution described how its transfer student fee structure – which is different for

“Institutions developed collaborative agreements to send and receive students and staff; however, participants shared stories of receiving fewer students than they were sending, receiving staff at lower levels of authority than they were sending and experiencing an overall lower benefit from the relationship.”

adult students - enabled the institution to remain competitive with other colleges and universities in the area. Yet another institution described a collaboration with a community college which is geared toward students who do not meet the undergraduate admissions criteria. Through this collaborative arrangement, the community college faculty teach the courses on the HBCU campus, the students enroll via the community college but live on the HBCU campus and – upon completing their community college credits – can easily transition to the HBCU as a full-fledged student. As the focus group participant explained, it is advantageous for students because it is not easily obvious to others that these students are not already members of the institution.

Several focus group members also mentioned pipeline programs, such as dual enrollment programs with secondary schools that allow students to take college courses. The pipeline programs' success is intentionally built upon the relationships that faculty and staff build with the students and their families early in the students' academic career. Focus group participants also explained how they focus on educating the parents about the college process, with the goal of helping families make informed decisions about college and enrolling the students in the HBCU when they graduate from high school.

The collaborative agreements are often very complex, requiring institutional representatives to work together and identify any barriers for students. In both survey and focus group results, several people mentioned having legal staff who follow their office's policies and procedures when reviewing MOUs. Focus group members shared several examples of faculty convening to review the curriculum and undertake the massive responsibility of ensuring alignment between their own and the partnering institution's curriculum. This is an integral step toward ensuring students' seamless transition from the high school diploma to the bachelor's degree. During the discussions, there were ample examples of cross-campus conversations and meetings to develop and sustain collaborative agreements designed to fill the gaps created by increased demands for access to college degrees. Focus group participants shared how they used data to review the possibility of continuing a program, developing a clearer understanding regarding the rewards of participating in a collaborative agreement and/or identifying new opportunities to collaborate. The use of data informed institutions' capacity to meet students' and the community's needs.

HBCUs have also made a tremendous impact in underrepresented students' participation in STEM-related majors.

According to a National Science Foundation (NSF) report (2013)² covering 2002 – 2006 doctoral recipients, a majority of the African Americans earned their bachelor's degrees at an HBCU. NSF further states that HBCUs comprise nine of the top ten baccalaureate institutions whose students eventually earned a doctoral degree in STEM-related majors. The NSF report also shows that more than 30% of science and engineering, 50% of agricultural sciences, more than 40% of physical sciences and almost 40% of biological science majors graduated from HBCUs and eventually earned a doctoral degree.

The focus group conversations provided meaningful insight into the reasons why HBCUs are so prominent in reshaping and redefining the STEM landscape. One institution passionately discussed the HBCU's focus on reaching out to youth in the community at a young age, introducing them to college early and exposing them to the culture. This happens, the participant explained, through a bridge program focusing on majors in which students of color have been historically underrepresented. Such programs introduced youth to majors such as physics, chemistry, nursing, engineering, technology and medical fields. This institution's work is indicative of the ways that HBCUs impact the burgeoning diversity in the aforementioned career fields. Further, given HBCUs' emphasis on post-baccalaureate degree attainment, these institutions encourage their students to secure summer internships, research opportunities, and advanced degrees. A significant number of the focus group participants described dual degree programs – i.e., three years as an HBCU undergraduate and two years at another institution, finishing the undergraduate degree while also completing a master's degree. Others highlighted the successes experienced in collaborative agreements that entered their students into nursing, medical, engineering and other STEM-related pipeline programs. The advantage for the students is having earned a liberal arts education, which in turn prepares them to use their critical thinking skills in advanced degree programs. HBCUs also benefit from the exposure of having sent quality students through collaborative arrangements and receiving credit as the students' degree-earning institution. Both institutions benefit from having established a program that diversifies and strengthens academic fields that have a direct impact on humans' standard of living.

Fiegner, M.K., & Proudfoot, S.L. (2013). Baccalaureate origins of U.S.-trained S&E doctorate recipients. National Center for Science and Engineering Statistics. Arlington, VA: National Science Foundation

HBCUs' internal collaborations are centered on the mission of raising a generation of scholars and professionals. True to the HBCU mission and legacy, many participants described their institutions' emphasis on the implementation of collaborative agreements designed to facilitate educational access. Whether discussing internal or external collaborations, institutional representatives provided multiple versions of cross-campus partnerships that were developed with the students and the community in mind.

Internal pressures for increasing enrollment, securing additional academic opportunities for their students and seeking recognition as a quality educational provider have fueled many of the collaborations among campus offices. Given the massive appeal and impact of social media, several offices find themselves working together to reach goals for enrolling more academically talented students. Academic Affairs, marketing, and admissions staff may find themselves conversing among each other to create an appropriate online institutional presence and educate recruiters about strategies for explaining degree program offerings to applicants. The end goal, of course, is to implement strategies that will attract potential students to the university's website, lead them to apply, and eventually enroll at the institution.

Internal collaborations were described as intentional and intrusive high impact practices that focused on serving underrepresented students and preparing them for college and careers while enhancing their levels of self-efficacy. Participants described a very intentional model that exposes academically talented and underprivileged students to the college culture. Focus group participants are proud that they can enroll and graduate students whose standardized scores and GPAs would suggest that they are less likely to earn a college degree. The participants also know that their success is not coincidental, but strengthened by working together for the students' good. Career services collaborates with the First Year Experience to ensure that freshmen are exposed to career paths early in their academic journey. Faculty collaborate amongst themselves and with administrators to monitor and prepare for the levels of academic preparedness with which students arrive. Institutional advancement works closely with several departments to identify collaborative

opportunities that will offer additional depth and breadth in students' educational experiences. In essence, institutional colleagues create impenetrable nets to ensure that that students do not fall through the gaps and have access to some of the best learning opportunities.

Although HBCUs have been impactful in establishing collaborative agreements, their efforts have been fraught with various challenges. The focus group included 13 very diverse and distinct institutions, yet most of them cited the very same challenges in administering collaborative agreements such as power imbalances and a need for strategically-focused agreements. Regarding power imbalances, the entire group was in consensus about the need to become much more intentional in ensuring equal exchanges. As many focus group members explained, institutions developed collaborative agreements to send and receive students and staff; however, participants shared stories of receiving fewer students than they were sending, receiving staff at lower levels of authority than they were sending and experiencing an overall lower benefit from the relationship. A few participants shared that these situations were remedied in a review of the MOUs. Some aspects of collaborative agreements, the participants asserted, could be addressed through focusing on what works best for the students and the institution.

Participants believed that the goal of establishing more equal relationships could be realized as HBCUs become much more strategic when developing and renewing collaborative agreements. Focus group members asserted that with the proper leadership and infrastructure, HBCUs can more effectively market their position as providers of quality academic programs and significant numbers of well-qualified, diverse students. With these strengths, however, participants also realize that HBCUs can do a better job leveraging their history of contributions when brokering collaborative agreements. It is also others' perceptions of HBCUs, the participants believe, that affect their capacity to develop collaborative agreements that benefit the students and institutions. Overcoming this obstacle will require the capacity for HBCUs to more effectively market their offerings and present their institution as a first choice for education, rather than a last choice.

POSSIBLE INITIATIVES

The findings from the survey and focus group responses were used to develop two possible initiatives that could help advance institutional effectiveness at the HBCUs.

INITIATIVE 1: SUPPORT TO INCREASE FACULTY CAPACITY AT HBCUS

Rationale: The multi-level and complex nature of curriculum development requires plans based on research in best practices and trends, along with a multitude of resources to effectively execute. HBCU faculty participants commented about balancing their passion for the students while also teaching five courses, advising students, and working on countless committees. At the same time, the institution also expects them to conduct research in preparation for tenure and promotion. While they are desirous of doing all of these things, they know that their small numbers can prevent them from doing as much as they planned. One gentleman described the challenge as “not having enough boots on the ground,” adding that a relative works at a nearby institution of comparable size, but with three times the number of staff. The participants commented that that they could only imagine how much more successful they would be if they had dedicated faculty and staff for certain needs. However, HBCUs have comparatively meager resources, which prevents them from attracting and retaining faculty who can help spread the work that is entailed in sustaining a dynamic curriculum. These institutions find it challenging to compete with larger institutions that can offer faculty the tools necessary for doing research, such as allotted time through course buy-out options, resources, and infrastructure.

Description:

The purpose of the initiative is to:

- a) increase the pool of highly talented faculty who have HBCU interest and experience;
- b) provide the HBCUs with additional support to implement their successful and innovative teaching and learning strategies; and
- c) provide the HBCUs with increased teaching capacity that although temporary, can alleviate the teaching responsibilities of their current faculty enough to focus on developing curricular innovations and getting support for their research

This initiative would consist of:

- 1) A fellowship program connecting the selected HBCUs and possible faculty candidates. This fellowship opportunity would allow faculty candidates to be introduced to the HBCU through a one to two year teaching opportunity. These faculty candidates would consist of PhD candidates and recent PhD graduates who would serve as a teaching focused visiting scholar at the HBCU. The fellow would be paired with a current HBCU faculty member who would provide mentorship.
- 2) Partnerships with faculty recruitment websites (i.e. Higher Ed Jobs, Diverse Jobs) to create HBCU specific portals and/or search options. These partnerships would allow the HBCUs to more easily engage applicants who are interested in higher education equity broadly and HBCUs in particular.
- 3) Support for the review and improvement of campus-based faculty recruitment and hiring practices. This would entail engaging key academic leaders in a conversation surrounding the best strategies for recruiting faculty. This would involve sharing of best practices from HBCUs and other campuses and faculty organizations. Participating campuses would produce a plan for reviewing and improving faculty recruitment on their own campuses.

INITIATIVE 2: SUPPORT THE USE OF INSTITUTIONAL DATA TO ADVANCE INSTITUTIONAL EFFECTIVENESS

Phase 1: Engage in professional development designed to help institutional researchers and leaders develop a strategy to advance the use and sharing of existing data across campus programs and departments.

Rationale: Ongoing faculty and staff development is also necessary to maintain dynamic curriculum and programs. While the participants offered various examples of the ways they use data, focus group members also expressed a desire for access to and appropriate use of various sources of data. The participants often spoke of the production of data reports that were being used for external purposes like particular grant or state initiatives, but were not widely shared and used on campus. Also, cases where plans were developed that were informed by data, participants experienced a lack of human resources to oversee the execution. Participants added that a plan from campus leadership that includes strategies for implementing programs based on data, incentives for faculty/staff data use, and faculty/staff training and development on how to interpret and use data is essential. Further, as more data on colleges and universities are more readily available (i.e. the college scorecard) it is important that external agencies and colleges/universities identify strategies for using this information to improve institutional effectiveness.

Description: This initiative would involve key campus data experts like the institutional researchers and other influential leaders in the development of a strategy for sharing and using data across campus. Key to the implementation of the developed plans is embedding them in campus strategic plans and aligning them with existing accountability systems (i.e. accreditation, performance funding systems, etc.).

Phase 2: Support the use of more advanced student data information systems by piloting new technology and providing ongoing training.

Rationale: The participants often pointed to the lack of resources and technology for the most advanced student information and data systems. A participant shared that “we have gaps in expertise for how to use the technology that we do have. Then we also have gaps in purchasing everything we need...we purchase according to what we can afford...not buy what we need... and leave off pieces we really need to make it more efficient.”

Participants noted that although they have data systems they often were not able to afford complete systems, system upgrades, IT support or faculty support, thus they often go unutilized or underutilized in curriculum and institutional planning. Consequently, the participants find themselves in a continuous struggle to accomplish more than their infrastructure will permit. Institutions appear to need expert assistance in designing and launching an IT Implementation Plan that will strategically focus on outlining technological acquisitions and use, ongoing professional development opportunities and assessing the plan’s effectiveness in cycles.

Description: Campuses that seem to be making strides in advancing the use of available data on their campuses in phase 1 could then be selected for the opportunity to expand their data system capabilities. Thus, phase 2 would involve purchasing more advanced software or upgrading current data systems to their full capabilities at a few pilot sites. Key leaders working in institutional research and assessment from these institutions would also receive intensive support and professional development so that they are equipped to train members on the campus on how to use the newly available data features.

CONCLUSIONS

Within the findings were also important lessons learned that could be used to inform future investments in this group of HBCUs.

1. Support significant investments in human capital for new initiatives.

Participants shared that they often receive support for particular initiatives without support for the human resources needed to oversee the execution of the program. They noted current faculty and administration are often expected to fulfill the needed roles, which leads to inefficiency in both their current and new role. As one participant expounds, “Its not just the idea, but the finances behind it. Do we have the people? How many? And if you bring me on a grant, how long is the grant? What happens when the grant ends, and do we have the money to support that person?” Another participant noted that “technology doesn’t run itself,” therefore investing in technology without supporting human capacity could stifle the progress of an initiative.

2. Ensure that campus leaders incorporate the initiative priorities into their strategic plans and accountability systems.

Accountability and leadership was key in discussions of developing strategies to improve institutional effectiveness. Participants felt that the leadership had to be intentional about creating a campus climate that encouraged and required initiative components such as using data and technology. The focus group members mentioned that faculty and staff are so busy that it is almost impossible to ensure they will incorporate a new strategy or program unless it is directly tied to their individual or institutional accountability system.

3. Ensure equitable benefits when designing collaborative arrangements with HBCU and non-HBCU partners.

The participants often described situations in which they engage in partnerships with other institutions and/or organizations but don’t see the same level of benefits as their partner. Consequently, the participants suggested that future partnerships should include MOUs that clearly explain how the HBCU will benefit from the initiative and ensure that there is some discussion about how these HBCU benefits will be sustained.

Finally, as a result of higher education’s focus on completion and institutional effectiveness, the questions of HBCU relevance, performance, and sustainability emerge with many wondering why some HBCUs are doing better than others. Why are some HBCUs doing well in some categories, and struggling in others? And what will be the future of the HBCUs who are unable to make improvements? As significant attention is given to how well HBCUs are doing on particular outcomes, it will be even more critical to gain a greater understanding of what challenges HBCU leaders are facing in their path to increasing institutional effectiveness, how these challenges vary by campus, and which strategies will be key to ensuring the sustainability of the sector. This study provided insight into the strategies HBCUs are already using and the nuances of the particular challenges they face in advancing institutional effectiveness. Finally, the findings helped the SEF researchers identify promising initiatives and a framework for making strategic investments in this group of HBCUs.

APPENDIX A: SURVEY INSTRUMENT

Investing in the Future: Lessons Learned from HBCUs

The Southern Education Foundation (SEF) invites you to participate in a survey about factors that impact HBCUs in regard to data collection and use, collaborative arrangements with external organizations/other HBCUs, technological infrastructure of admissions/enrollment management and processes that influence the role of curricular decisions.

This survey takes approximately 10 minutes and it is voluntary. This means that you can stop participating at any time with no consequences. All survey results will be reported at the group level, which means that no individual responses can be linked to any participant or institution. SEF asks that you provide responses that are as thorough as possible. By completing and submitting this survey, you are consenting to your participation in the survey.

The survey will remain open until Monday, August 31st. Please feel free to contact the Principal Investigator with any questions or concerns regarding your rights as a participant: Dr. Tiffany Jones, Program Director, Higher Education Research and Policy, Phone: 404-991-6771 (9:00am – 4:00pm EST), Email: tjones@southerneducation.org.

1. In which department do you work?

- Academic Affairs
- Admissions/Enrollment Management
- Business and Finance
- Institutional Assessment/Effectiveness/Research
- Student Affairs

Other (please specify):

2. In what ways does the demand for certain majors affect curricular planning and how does your department respond?

3. What collaborative arrangements does your department have with other institutions/organizations to increase efficiency and/or effectiveness?

4. What institutional policies and procedures enable collaborative arrangements?

5. What institutional policies and procedures hinder collaborative arrangements?

6. How often do you use institutional data for the following?

	Never	Rarely	Sometimes	Often	Always	Does Not Apply to Me
Accreditation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Admissions/Enrollment Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Budget Decisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Collaborative Arrangements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Curriculum	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. Regarding the work that you do in your department....

	Never	Rarely	Sometimes	Often	Always	Does Not Apply to Me
Are data collected?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can you access it on your own?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is it received in a timely manner?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is it of good quality?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is it useful to you?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is it shared with those who make decisions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you use it to make decisions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you use it to make improvements?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. In what ways do you use data to facilitate success in your department?

9. How often do you use technology for the following?

	Never	Rarely	Sometimes	Often	Always	Does Not Apply to Me
Accreditation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Admissions/Enrollment Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Budget Decisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Curriculum	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

10. How would you rate the following technology?

	Very Ineffective	Ineffective	Neither Ineffective or Effective	Effective	Very Effective	Does Not Apply to Me
Course Management (e.g., Blackboard)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Student Information System (e.g. Banner, Jenzabar, Peoplesoft, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology in the Classroom	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
WiFi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. In what ways do you use technology to facilitate success in your department?

12. In what ways does the work in your department impact the university's success?

13. What practices, in your department, enable you to help the institution to realize its mission?

14. What practices, in your department, hinder you from helping the institution to realize its mission?

15. What practices, in other departments, enable you to help the institution to realize its mission?

16. What practices, in other departments, hinder you from helping the institution to realize its mission?

SOUTHERN EDUCATION FOUNDATION RESEARCH TEAM



Tiffany Jones, Ph.D.
Program Director, Higher
Education Research and
Policy

Dr. Tiffany Jones is the Program Director for Higher Education Research and Policy at the Southern Education Foundation (SEF). She engages in research and initiatives that address higher education accountability, assessment, and finance, developmental education, institutional effectiveness, and Minority-Serving Institutions (MSIs). Dr. Jones has published book chapters, scholarly articles, OpEds and policy reports that have focused on the ways that policies and practice facilitate college access and success for students of color. Most recently, her article “A Historical Mission in the Accountability Era: A Public HBCU and State Performance Funding,” published in *Educational Policy*, examined the impact of a state performance based funding policy at a public Historically Black University. Prior to joining SEF, Jones was a dean’s fellow at the Center for Urban Education (CUE) at the University of Southern California where she helped advance the Equity Scorecard in unique contexts like MSIs and urban high schools. She has also worked with the Pullias Center for Higher Education, the Pell Institute for the Study of Opportunity in Higher Education, and various pre-college programs.

Dr. Jones earned a bachelor’s degree in family studies from Central Michigan University, a master’s degree in higher education administration from the University of Maryland, College Park and a doctorate in education policy at the University of Southern California.



Carla Morelon, Ph.D.
Project Consultant

Dr. Carla Morelon has worked in higher education for 24 years and is originally from Arkansas. Her areas of expertise include accreditation, assessment/evaluation, institutional/organizational effectiveness and strategic planning but she truly has a passion for using her skills to help institutions manage programs efficiently and effectively. She developed these skills while working at Dillard University (New Orleans) as the director for such programs as institutional effectiveness and assessment, academic advising, Supplemental Instruction and the Honors Program. She joined Dillard after earning her Ph.D. in Higher Education Administration at Indiana University (Bloomington), where she worked as a Research Associate for University Planning, Institutional Research and Analysis unit, Project Associate for the National Survey for Student Engagement (NSSE) and Co-Evaluator of the GEAR-UP Grant. During that time, she also created a doctoral research team that published the book, *Standing on the Outside Looking In: Underrepresented Students’ Experiences in Advanced Degree Programs*. Before enrolling at Indiana, she completed an M.Ed. in Higher Education at Vanderbilt University’s Peabody College of Education and often returned to Arkansas to administer college preparation workshops for her community. Her passion for education has its foundation in her mother’s emphasis on the importance of getting a college degree. As a Grambling State University graduate, she attributes her successful undergraduate experiences to a cadre of caring faculty and staff as the second reason that she is so eager to help others realize their educational aspirations.

SOUTHERN EDUCATION FOUNDATION RESEARCH TEAM



Marvin Boomer

SELI Fellow

Marvin Boomer is a doctoral student of philosophy in educational research and policy analysis, at North Carolina State University. He received his Master of Arts in teaching with a certification in mathematics and a Master of Business Administration in entrepreneurship from Belmont University. Prior to his graduate studies, he earned a Bachelor of Business Administration in business information systems from Tennessee State University. Marvin has held numerous leadership positions within his communities, working as a math and computer teacher for Metro Nashville Public Schools, a lead math teacher for the 100 Kings Program of 100 Black Men, and serving as a Big for Big Brothers Big Sisters of Middle Tennessee among others. He is a member of Division L (Education Policy and Politics) in the American Educational Research Association, Graduate Student Advisory Board President for the College of Education at North Carolina State, and a member of Alpha Phi Alpha Fraternity.



LaToya Russell

Higher Education Doctoral
Intern

LaToya Russell is a fourth year dean's doctoral fellow in the College of Education at Georgia State University. Her major is educational policy studies with a concentration in research, measurements and statistics and women's studies. LaToya holds a Master of Education Leadership, Politics and Advocacy degree from New York University and a Bachelor of Science in public relations degree from Florida A&M University. Her research interests include the black middle class, girls, identity development and emancipatory research methods. She has held various positions working with youth organizations including the Posse Foundation, the NYU Metropolitan Center for Urban Education, College Summit and The Bishop John T. Walker School for Boys in the areas of research, development, fundraising and program development.

SOUTHERN EDUCATION FOUNDATION RESEARCH TEAM



Micah Evans is a Program Assistant at the Southern Education Foundation. Prior to joining SEF, Micah served for seven years as a legal researcher and analyst with the information and intellectual property firm, Thomson Reuters. Based in their D.C. office, Micah acted as an information liaison between the firm and the Information and Records Division Chief at the Copyright Office of the Library of Congress. While attending the University of Maryland as a political science major, Micah pursued education and community reform through social media outlets, church and community outreach organizations. Micah served as a mentor at the Wendt Center for Loss and Healing, Grant Assistant at the Metropolitan Community Development Corporation, and group organizer for the Men’s Ministry at BWOMI.

Micah Evans
Program Assistant



Chandra Halstead is an Office Manager for the Southern Education Foundation. Prior to joining SEF, Ms. Halstead was the Overseas Grants Assistant for the Ford Foundation’s Office of Management Services, providing administrative, logistical and consultant support for overseas offices located in Hanoi, Johannesburg, & New Delhi. During Ms. Halstead’s 17 year tenure with the Ford Foundation, she held several positions including Secretary for the Grants Administration and Operations Department and Administrative Assistant for the Office of Management Services. Halstead received an Associate’s Degree in applied science from the New York City Technical College in 1991.

Chandra Halstead
Office Manager

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Our core belief is that education is the vehicle by which all students get fair chances to develop their talents and contribute to the common good.

Southern Education Foundation
135 Auburn Avenue, N.E., Second Floor
Atlanta, Georgia 30303

WWW.SOUTHERNEDUCATION.ORG

