

2010-2015 STRATEGIC PLAN OVERVIEW



STRATEGIC DIRECTIONS AND CORE ACTIVITIES

The organization's name, *Excelencia* in Education, is intentionally bilingual. *Excelencia* is a simple cognate—a reader does not have to know Spanish to know the word means “excellence.” The organization's name reflects our commitment to Latino students, to quality education, and the asset base available to the broader U.S. community by supporting excellence in education.

Excelencia believes what describes us need not divide us as a nation. By putting a Latino lens on issues in higher education, the organization does not exclude others, rather *Excelencia* creates opportunities to examine issues from a new perspective and reconsider traditional efforts in a nontraditional context that can benefit all.

MISSION

To accelerate Latino student success in higher education.

CORE STRATEGIES AND OBJECTIVES

The mission for *Excelencia* is supported through five core strategies:

- 1. Expand Knowledge through Research.** Inform policymakers and campus leaders to promote education policies and institutional practices that better serve Latino students by delivering strategic, data-driven analysis focused on Latino students in higher education, including what we know about Latino student success, what works to improve it, and what policymakers and institutional leaders can do.
- 2. Build Will for Institutional and Policy Change.** Work with partners to help build a sense of urgency for bolstering Latino student success and make it a priority in federal, state, and institutional policy. Build awareness and action for public policy issues influencing Latino higher education success through publications, Capitol Hill briefings, dialogue with Executive Branch officials, media strategies, and collaboration with like-minded partners.
- 3. Apply Action through Programs.** Reshape public policy and institutional practices through programs that engage policymakers and institutional leaders in active reflection on promising policies, strategies, and tactics. Identify, document, celebrate, and publicize effective higher education models and practices of institutions of higher education that improve Latino student success.
- 4. Equip the Field to Excel.** Develop effective policies and compel and support policymakers and higher education professionals to transform institutional practices while also organizing a national network of results-oriented educators and policymakers focused on accelerating Latino student achievement and success.



- 5. Strengthen *Excelencia's* Capacity, Visibility, and Authority to Catalyze Change.** Build on the first six years of work while expanding staff, growing and diversifying the funding base, expanding communications strategy, and implementing clearer measures of impact across five areas — reach, engagement, influence, action, and funding.

The first strategy is the same one that has driven *Excelencia's* work in the first six years. Achieving the other four strategies will move the organization into several new directions, with objectives including:

1. Expanding *Excelencia's* policy work to move from policy discussion to action;
2. Developing alliances and coalitions to leverage partners, champions, and influencers for measurable increases in Latino student success;
3. Participating in a national outreach campaign in partnership with like-minded organizations to build the sense of urgency and advance a common message;
4. Fully implementing the *Excelencia* in Action network, by engaging campuses, providing information, creating peer knowledge sharing, and providing direct technical assistance to better equip the field to make needed changes in higher education;
5. Expanding *Excelencia's* organizational capacity to provide — or catalyze — national leadership in key policy areas.

THEORY OF ACTION

Excelencia in Education’s guiding theory of action is as follows: The nation can make a measurable difference in increasing Latino student success in higher education by informing decision makers, showing them what can be done, and holding them accountable; by working within institutions to provide incentives and compel action; and by creating a supportive community of action-oriented advocates.

This theory of action is guided by three broad assumptions about how policy and institutional change in higher education happens.

- **The current condition is more widely known and gains urgency.** We need to educate decision makers about the current status of Latino student achievement, demographic projections, and educational practices and policies and help them recognize the urgency of addressing Latino success for the U.S. to meet its workforce needs.
- **Leaders identify key pressure points and what can change.** Leaders are more likely to make changes if they recognize what the desired changes will look like in policy and practice; have a concrete, actionable policy agenda that addresses institutional and state contexts; and hear from key influencers, including opinion leaders, the public, the media, outspoken critics, and engaged champions.

- **We provide the means for those who act to leverage their efforts.** Institutions and advocates for change need to be organized into communities of action, supported, and given tools to move the (shared) agenda forward.

In this next phase of work, *Excelencia* in Education will redouble its efforts to ensure that the issues surrounding Latinos’ current status and success in higher education are widely known and gain urgency; the solutions are broadly understood, with tools for implementation; the benefits to the country are recognized; and the network of results-oriented advocates ready to leverage change grows.

New Byline for New Phase: Since 2004, *Excelencia*’s byline has been “Applying knowledge to public policy and institutional practice. To emphasize the new theory of action *Excelencia* will begin 2011 with the byline, “Inform. Organize. Excel.”

Tactical Approach

Excelencia is building on its successes to advance more comprehensive strategies to provide the necessary knowledge, policy frameworks, institutional change strategies and supports, and public will to increase Latino student success in college and the workforce. The following outlines *Excelencia*’s strategies and rationale for the next five years.

WHAT WE WILL DO	WHY NOW?	WHY EXCELENCIA?
Expand Knowledge through Research	▲ There is an urgent need to identify what leaders and policymakers can do to increase college attainment.	▲ <i>Excelencia</i> ’s research has explored the key questions and helped fill crucial information gaps.
Build Public Will and Leadership for Latino Success	▲ Recognition of the immense potential benefits to the nation from improving Latino student success should be a priority for more decision makers.	▲ <i>Excelencia</i> leverages media for awareness and support. ▲ <i>Excelencia</i> has built effective partnerships with stakeholders across multiple sectors.
Redirect Policy and Priorities to Compel Action	▲ State higher-education policy, dominated by budget short falls, is focused on cost-cutting, including capping enrollments. ▲ Strategies for Latino success are not part of state policy. ▲ Evidence shows investments in Latino students’ achievement yield results.	▲ <i>Excelencia</i> is a trusted advisor to leaders in Washington and has conducted policy audits in key states with increasing Latino populations. ▲ <i>Excelencia</i> has helped change how policymakers and advocates talk about Latino student success.
Equip the Field to Improve Latino Student Success	▲ Institutions are ready and willing to share ideas and work across boundaries to expand solutions, but need to know what works and what technical assistance is available.	▲ <i>Excelencia</i> benchmarks effective practices for Latino student success. ▲ <i>Excelencia</i> has a national network of experts ready to be mobilized as technical assistance providers. ▲ <i>Excelencia</i> has a proven record of serving as an intermediary and fiduciary agent with organizations working with Latinos.
Strengthen <i>Excelencia</i> ’s Capacity, Visibility & Authority	▲ <i>Excelencia</i> ’s demonstrated efficiency and effective strategies would grow with additional staff, partnerships and funding to catalyze change.	▲ <i>Excelencia</i> has identified a smart-growth plan, developed metrics to track success, and identified initial resources to implement its strategic plan.

CORE ACTIVITIES

Excelencia in Education's mission is to accelerate Latino student success in higher education.

1. Expanding Knowledge through Research: *Excelencia* builds national inventory of strategic information and promising practices while concurrently enriching its efforts to serve as an information source on Latinos in higher education.

RESEARCH AGENDA: Hispanic-Serving Institutions (HSIs), financial aid, institutional leadership and programmatic efforts, program audits, student experiences, gender disparities, and policy efforts at the federal, state, and institutional levels.

RESOURCE CENTER: *Excelencia* will establish a centralized resource center on HSIs at our website and grow this center to serve as a resource center for all Minority-serving Institutions (MSIs).

2. Applying Action through Programs: *Excelencia* works with institutions and states to analyze current policies and practice and identify what is working and guide implementation of improvement strategies in outreach, access, retention, transfer and attainment.

EXAMPLES OF EXCELENCIA: The only data driven national initiative to identify and publicize programs and departments that accelerate Latino student success at the associate, baccalaureate, and graduate levels. The results include these highly visible products:

- **What Works for Latino Students in Higher Education**, a compendium that profiles these powerful, replicable, and scalable institutional practices and strategies.
- **Celebración de Excelencia**, gives national prominence to the year's Examples and is organized in cooperation with the Congressional Hispanic Caucus and other members of Congress and held in the fall on Capitol Hill.

GROWING WHAT WORKS: provides the means for *Excelencia* to serve as an intermediary organization supporting the use of promising practices at campuses focused on Latino student success.

- **SEMILLAS** (Seeding Educational Models that Impact and Leverage Latino Academic Success) grants are awarded to selected colleges and universities to begin replication of effective practices.
- **Growing What Works database**, catalogs promising practices at the associate, bachelor, and graduate levels in a searchable database made available to the public through *Excelencia's* website.

ACCELERATING LATINO STUDENT SUCCESS (ALASS™) technical assistance: *Excelencia* applies a data-driven field tested approach to student success for Latinos Staff members work with campus leaders to evaluate



the current status of Latino students on their campus and to determine effective practices to improve Latino student success.

- **Inquiry model:** includes tools for campuses to increase awareness and diagnose needs to improving service to Latino students.
- **Workshops and convening:** provide forums for exchanging tactical information and promoting compelling, effective campus-based strategies for institutional leaders, administrators, and staff.

3. Building Will for Institutional and Policy Change: By developing state specific analysis and sharing tools and strategies, *Excelencia* helps clarify the current status and what can be done to better support greater Latino success in higher education.

ENSURING AMERICA'S FUTURE BY ACCELERATING LATINO COLLEGE COMPLETION (EAF): engages sector leadership to focus on Latino students as essential to America's human capital growth. Policy is the lens to compel action on large-scale change. In this phase of the initiative EAF is developing measures, tactics, and strategies to encourage expansion and replication of effective policies and practices in three tracks: Information, Engagement, and Sustainability.

IMPACTO (Information for Impact on Latino College Access and Success): an information initiative to increase Latino degree completion—IMPACTO. Through this initiative *Excelencia* will develop another strategy to strengthen the functional knowledge about Latino students by the principals of education campaigns that target first-generation, low-income students— particularly Latino students, and their families. IMPACTO is designed to serve as the dedicated information source on Latino student trends in college preparation, access, participation, and completion for IMPACTO principals.



4. Equipping the Field To Excel: *Excelencia* works with influential individuals and sectors to clarify points of consensus and facilitate collaboration towards Latino student success.

EXCELENCIA IN ACTION NETWORK: establishes a community of professionals to effectively connect policy experts, institutional and organizational leaders working to increase Latino student attainment in higher education. In 2011 the network will provide: Access to network members' contact information, *Excelencia* publication pre-release conference calls, networking meetings during ALASS Workshops, and invitation to a 2011 Latino college completion benchmarking event. Further, a webinar series planned to begin spring 2011, will be designed to pilot exclusive benefits for network members.

EXCELENCIA EXPERTS: include a select group of experienced educators ready to help campus professionals build institutional initiatives using ALASS tools. *Excelencia* Experts will also be available to design staff development opportunities through activities such as data and advocacy workshops; critique of action plans and reports; shadowing opportunities; participation in *Excelencia* internships, conferences, and policy forums. *Excelencia* Experts will begin operation in a beta phase in 2011.

5. Strengthening *Excelencia's* capacity: To catalyze large-scale change in Latino student success in higher education, *Excelencia* will implement smart growth in staff, board of directors, partnerships and diversified funding to meet the goals of this strategic plan.

ASSESSING IMPACT

Excelencia measures impact across five areas – reach, engagement, influence, action, and funding.

Reach: To what degree have we created exposure to content and message? Measuring the impact of *Excelencia's* reach includes online presence via a website and social media, issue briefs and reports, electronic and mainstream media, and engagement of other organizations.

Engagement: Who, how and where are people interacting/engaging with *Excelencia's* content? Measuring the impact of *Excelencia's* engagement includes website and other communication tools, leadership, and reach.

Influence: How has reach and engagement influenced perceptions and attitudes of key groups? Measuring the impact of *Excelencia's* influence includes leadership, general trends, media, and policy conversations.

Action: How *Excelencia's* portfolio has compelled action? Measuring the impact of *Excelencia's* action includes legislative action, promising practices and innovation, policies and practices, and partnerships.

Funding: Has *Excelencia* increased and diversified financial support for the organization? Measuring the impact of *Excelencia's* funding includes foundations, corporations, programming, contracts, speaking engagements, and donations.

Each core activity includes an articulated work plan and timeline. Implementation will be measured by fulfillment of project and quarterly goals and product delivery. This data will be added to the process indicators used to assess *Excelencia's* impact in key five areas: reach, engagement, influence, action, and funding and progress will be assessed annually. This process will maintain *Excelencia's* high performance and allow the team to stay nimble and available to respond to unexpected new opportunities.

“IN JUST A SHORT TIME, *EXCELENCIA* HAS PLAYED A VITAL ROLE IN HIGHER EDUCATION POLICY BY FOCUSING POLICYMAKERS AND HIGHER EDUCATION LEADERS ON THE NEEDS OF LATINO STUDENTS, AND SUPPORTING STATES AND INSTITUTIONS WHENEVER AND WHEREVER THEY ARE NEEDED.”

– The Honorable Richard W. Riley,
Former U.S. Secretary of Education and partner,
Nelson Mullins Riley & Scarborough, LLP

ASSESSMENT: PRESENT AND FUTURE

Niche Analysis

The following niche map indicates where *Excelencia* fits in the landscape of organizations working to improve Latino success in higher education and identifies the major focus of these organizations in six categories.

The Niche Map helps to clarify *Excelencia* in Education's scope, strategies, and relationships:

■ *Excelencia* advances a broad spectrum of approaches to meet its objectives. For example, *Excelencia* stresses comprehensive, high-leverage strategies at the state and institutional level. *Excelencia* works across four of the six areas identified in this Niche Map.

- *Excelencia* focuses on transforming institutional rather than student behavior.
- By working across institutions and policy, *Excelencia* helps bridge the gap between institutional practice and the policy context.
- There is a dearth of activity in supporting institutional improvement, which *Excelencia* is working to fill with the establishment of the *Excelencia* in Action network.
- *Excelencia* partners with most of the organizations in this Niche Map that work in greater depth or in areas *Excelencia* does not address, in order to extend the organization's impact.

ORGANIZATION	MAJOR FOCUS					
	Research	Policy Analysis/ State Policy Support	Advocacy/ Info Sharing	Scholarships or Internships	Institutional Improvement/ Technical Assistance	Membership
<i>Excelencia</i> in Education	■	■	■		■	
Pew Hispanic Center		■				
Hispanic Association of Colleges & Universities (HACU)	■		■	■		■
Hispanic Scholarship Fund (HSF)				■		
Hispanic College Fund (HCF)				■		
Hispanic Heritage Foundation (HHF)				■		
Congressional Hispanic Caucus Institute (CHCI)			■	■		
National Association of Latino Elected and Appointed Officials (NALEO) Educational Fund			■			■
Tomas Rivera Policy Institute (TRPI)	■	■				
Education Trust	■	■	■			
Institute for Higher Education Policy	■	■				

This strategic plan reflects *Excelencia*'s continued commitment to accelerate Latino student success in the next five years. The plan charts a course for *Excelencia*'s growth from an aggregator of information and what works for Latinos in education into a catalyst/facilitator for action to increase Latino college attainment. It identifies the leadership, expertise, staffing, and infrastructure required to help the organization build will for institutional and policy change, encourage more intentional implementation of research and policy frameworks for states, institutions, and federal government; and equip the field and its leaders to act. *Excelencia* in Education enters this next phase of work financially solid, field-tested and ready to deploy lessons learned. This is reflected in our new tag line introduced in 2011, *Excelencia* in Education—Inform, Organize, Excel.

“*EXCELENCIA*'S KNOWLEDGE AND SINGULAR ABILITY TO WORK WITH COLLEGES, UNIVERSITIES AND HIGHER EDUCATION DECISION MAKERS PROVIDES A VITAL RESOURCE AT A CRITICAL TIME IN AMERICA.”

– *The Honorable Henry Cisneros, Chairman of CityView*
