

LUMINA FOUNDATION

STRATEGIC PLAN FOR 2017 TO 2020



LUMINA FOUNDATION is committed to the creation of an equitable, universal postsecondary learning system to meet the nation's need for talent and offer all Americans the chance for a better life through increased attainment. The learner-centered, outcomes-focused system will expand postsecondary opportunity by recognizing learning wherever and however it is obtained, offering a wide range of transparent, high-quality credentials at different levels, and connecting all forms of postsecondary learning through clear, learning-based pathways.

Reaching Goal 2025—that 60% of Americans hold degrees, certificates or other high-quality postsecondary credentials by 2025—is essential to meeting our nation’s growing need for talent.

Not only are knowledge and skills paramount in our economy, the very opportunity to participate fully in American life—to hold a good job, participate as active citizens, raise a family, and contribute meaningfully to building safe and prosperous communities—now requires some form of postsecondary learning. But opportunities for postsecondary success are unequally shared, and that means millions of Americans cannot fully contribute to the nation’s well-being or reach their own goals. True opportunity in America now depends on postsecondary learning. The fact that not all Americans have access to high-quality postsecondary learning—and that race, ethnicity, income, and immigration status, among other factors, determine who does—is intolerable.

This is why Lumina Foundation remains focused on significantly increasing the number of Americans who hold high-quality postsecondary credentials. Goal 2025 became the focus of Lumina’s first strategic plan in 2009. This strategic plan, our third, comes at the halfway point to Goal 2025—eight years into the effort and with eight years to go.

Today, after decades of stagnancy, more than 4.2 million more Americans hold college degrees than in 2008, and many more Americans understand the need to increase postsecondary attainment. Still, while progress has been made, the nation is not yet on track to reach Goal 2025, nor is there a sufficient sense of urgency about the action that needs to be taken.

Lumina believes the time has come for the U.S. to make universal postsecondary education a national reality and an expectation for all. This need is a direct result of the shift from an industrial economy to a global knowledge economy. The reality and magnitude of this shift are now abundantly clear. Since 2011, the U.S. economy has added 11.5 million net new jobs for workers with postsecondary education but only 80,000 for those with a high school diploma or less.¹ The recovery from the Great Recession never came for the millions of Americans who lack postsecondary education and therefore have few options for good jobs and economic security. This fact has profound implications for American society.

A century ago, in response to the shift from an agrarian to an industrial economy, the expectation for how much education all Americans should have shifted from eight years to a high school diploma. Universal secondary education became a reality relatively quickly, thanks to a movement that began and spread at the community level, was eventually codified by states, and was finally recognized in federal policy. Just as universal secondary education did not result in all Americans completing high school, universal postsecondary education will not mean that all Americans will have a college degree. But it is now essential that our national expectation be that all Americans obtain postsecondary learning leading to quality credentials. Lumina’s work and Goal 2025 have implicitly made the case for this shift going back to our first strategic plan.

1. *America’s Divided Recovery: College Haves and Have-Nots*, Center on Education and the Workforce, 2016

Through the work we've done under our first two strategic plans, we have learned what it will take to reach the goal. But we also have learned that the changes that must be made are not mere tweaks. Modest, incremental improvement will not suffice. Indeed, fundamental redesign is required. We must move from a system that is centered on institutions and organized around time to one that is centered on students, organized around high-quality learning, and focused on closing attainment gaps. In short, we must build a true *system* of postsecondary learning from the disconnected and fragmented pieces we have now.

Road Map to Goal 2025

Between now and 2025, assuming current rates of degree and certificate production continue, about 24.2 million Americans will earn postsecondary credentials. To reach Goal 2025, **16.4 million** more need to be added to that total. Lumina is committed under this strategic plan to make substantial progress by 2020 toward this total. Specifically, our target is to increase attainment by **5.9 million** over the next four years. These credentials will be earned by the millions of Americans who will not obtain postsecondary credentials if we keep doing what we're doing but could be added to the total counting toward Goal 2025 if we take the necessary steps:

1. By 2025, 4.8 million of the **16.4 million** additional credentials need to go to **traditional-aged students** currently between the ages of 16 and 24 who now are not likely to complete postsecondary education. By 2020, the time frame of this strategic plan, our target is to increase attainment among this population by 500,000.

To produce these graduates, quality postsecondary education must be universally available to all prospective students. But availability is not enough; proven strategies to increase the postsecondary success of students from underrepresented groups must be implemented on a wide scale. For that reason, much of the increase in attainment for this population is anticipated between 2021 and 2025.

Goal 2025 will remain out of reach unless postsecondary attainment among African-Americans, Hispanics, and American Indians increases significantly. Lumina's metrics focus on increasing both enrollment and completion so that students from these groups earn at least 2.5 million of the additional credentials needed among traditional-aged students.

2. By 2025, **6.1 million** of the additional credentials need to go to **returning adult students**—those who have attended college but not obtained a credential. By 2020, our target is to increase attainment by 2 million among this population.

More than 27 million Americans have some postsecondary education but lack a high-quality credential—whether a degree or a high-value postsecondary certificate. Many are Americans who are close to completing but have “stopped out” of college—meaning they are not enrolled and making progress toward a degree. Many have every intention of finishing, but the longer they stay out of college, the harder it is to come back and complete. However, research shows that, with the right supports, many of these returning adults could be put back onto a pathway to completion.

Others in this population are farther from completion, have moved away from the institution where they began their postsecondary studies, have credits from multiple institutions, or now need a different credential because of a career change or a change in their aspirations. At the same time,

many of these Americans have obtained college-level learning on the job, in the military, or through public service. Much larger increases in postsecondary attainment are possible if competency-based education and other innovative programs that meet the needs of these adult learners for quality credentials were implemented at scale.

Because of the persistently low attainment rates among African-Americans, Hispanics, and American Indians, much more must be done to ensure these Americans have realistic pathways to return to postsecondary education and complete a quality credential. Unfortunately, current postsecondary data systems do not allow us to accurately determine whether the racial and ethnic gaps in postsecondary attainment for adults are being reduced or are in fact increasing. We need this data to help identify and broadly implement effective approaches to increase attainment, so Lumina will continue work to improve data across the postsecondary landscape.

3. By 2025, **5.5 million** of the additional credentials need to go to **adults with no recognized postsecondary education**. Our target for 2020 is to increase attainment among members of this population by 3.4 million.

This is the most underserved of all populations in the U.S.—63.8 million Americans between the ages of 25 and 64. Currently, these Americans have little or no realistic chance to obtain high-quality postsecondary credentials that lead to further education and employment. There is a strong equity imperative to provide meaningful postsecondary learning to these adults. They are disproportionately members of underrepresented racial and ethnic groups and poor. Some are incarcerated. Millions are recent immigrants with low levels of education and limited proficiency in English. Millions more are workers who have been displaced from middle-class jobs and, due to a lack of postsecondary skills, face enormous difficulty finding jobs that offer the level of income and benefits they had before.

The pathways for most of these Americans will lead initially to postsecondary certificates and industry-recognized certifications—credentials that demonstrate the skills that can help them quickly obtain good jobs. High-quality certificates—non-degree postsecondary credentials usually awarded by educational institutions—can offer pathways to good jobs and further education and could play a larger role as a first step on the ladder to better lives.

Certifications—industry-recognized credentials based on competencies and skills—also play a key role in expanding postsecondary opportunity. Today, 3.3 million Americans between the ages of 25 and 64 hold a job-related certification as their highest postsecondary credential. Although certifications often lead to good jobs, they do not yet offer clear pathways to degrees and other recognized postsecondary credentials. Not only do those who hold certifications lack a clear path forward to further postsecondary education, they also remain vulnerable to the next economic downturn or disruption. We are working to ensure that, by 2020, pathways are created to allow postsecondary certifications to meet Lumina’s definition of high-quality postsecondary credentials and be counted toward Goal 2025. Strong pathways are also essential to assure that certificates and certifications expand opportunity and do not become a lower-quality default credential only for members of traditionally underserved groups.

Unfortunately, current data systems do not allow us to follow certificate and certification holders as they progress in both education and careers. It is essential that data systems be developed and implemented to provide reliable national information on these credentials.

Today's Student and Lumina's Equity Imperative

While current systems of postsecondary learning work well for some, all of the 16.4 million additional credentials needed to reach Goal 2025 will go to Americans who will be, by definition, *post-traditional* learners. Today's students—and all of the new students we must bring into the postsecondary learning system—are different from those of past years. More are African-American, Hispanic, and American Indian. Many are poor and the first in their families to pursue education beyond high school. Many more are adults over the age of 25. Since postsecondary attainment has become the key determinant of economic opportunity and social mobility in the U.S. as in other countries, closing gaps in postsecondary attainment associated with race, ethnicity, income, immigration status, and other factors is central to Goal 2025.

The enormity of the forces that are driving the need for millions more Americans to obtain quality postsecondary credentials should not be underestimated. For generations, Americans could reach the middle class with a high school-level education or even less, but millions of the jobs that made this possible—in industries as diverse as manufacturing, mining, and energy—have been lost through technology or global competition. The good jobs that remain require postsecondary credentials and the increased levels of knowledge and skill they signify. Unfortunately, many Americans who have been displaced, or fear that their jobs may be next, lack these credentials and are not pursuing them.

The Americans who have been affected by this fundamental shift in our economy are all around us. They live in cities and rural areas, in all states, and are all of all races and ages. What unites them is a steady decline in their standard of living—one that is reflected in a wide range of economic and social indicators. It is not just that Americans who lack postsecondary credentials have falling wages in constant dollars and lower rates of labor force participation; today we face the shocking reality that these Americans have higher rates of mortality from drug overdoses, traffic accidents, and suicide. Expanding postsecondary opportunity is essential to reduce the inequality that affects so many aspects of American life. But frankly, we do not yet have a postsecondary learning system in place that can meet the growing demands for postsecondary credentials from Americans on the lower rungs of the economic ladder.

Equity must be at the center of our work to increase postsecondary attainment and reach Goal 2025. We believe that without intentional and focused efforts to address inequality in postsecondary attainment, gaps in opportunity will continue to grow. This means that the postsecondary system must be redesigned to give all Americans—regardless of race, income, and other socioeconomic factors—the opportunities that postsecondary attainment provides. We must also face the fact that while some progress has been made since 2008, attainment rates for African-American, Hispanic, and American Indian students continue to lag behind those of whites and Asian-Americans. Lumina is committed in all of our work to make measurable and significant progress in closing these gaps by 2025.

A Postsecondary Learning System for All Americans: Five Priorities for Action

To produce the 16.4 million additional credentials needed to reach Goal 2025, we need a system that reflects the expectation that all Americans earn a postsecondary credential. The postsecondary learning system must be one that addresses the root causes of inadequate attainment, where the meaning of postsecondary credentials is clear to all, where all learning is recognized however and wherever it is obtained, where arbitrary limits on postsecondary opportunity are eliminated irrespective of how individuals enter the system or the path through it they choose to follow, and where the student and

not the institution is at the center. To create the nimble workforce America needs in a global knowledge economy, the postsecondary learning system must also offer opportunities for continual lifelong learning and skill development.

Over the next four years, Lumina will focus on five interconnected priorities for action—big ideas about how to reach Goal 2025 by meeting the needs of the populations whose attainment must increase.



A postsecondary learning system where the top priorities are completion of quality credentials, affordability, and closing equity gaps.

In recent years, our understanding of how to increase student success in postsecondary education has expanded significantly—so much so that there is now little doubt about what it will take to narrow or even close gaps in attainment and increase the number of Americans earn high-quality postsecondary credentials. Colleges and universities, other postsecondary learning providers, states, the federal government, communities, and employers all have roles to play in assuring that this student success agenda is implemented at a wide scale across the postsecondary landscape.

Most important is that communities, colleges and universities, other postsecondary providers, and policymakers work together to implement integrated action plans to increase postsecondary attainment. Indeed, a growing number of communities—with colleges and universities deeply engaged—are showing the way. It is time for the proven approach being taken by these institutions and communities to become the norm in American higher education. This evidence-based approach requires sustained, large-scale effort, but it dramatically improves results for students. The student success agenda focuses on three things: 1) that all students are on a guided academic pathway leading to a high-quality credential, 2) that robust institutional data tracks the progress of all students along their pathway in real time and identifies any problems they face in meeting their learning goals, and 3) that targeted academic, social, and financial supports get students back on track and keep them on a pathway to completion.

Creating an expectation that all Americans complete some form of postsecondary education demands that it be affordable to all. But affordability has been loosely defined at best, and public attention is overwhelmingly focused on tuition rates rather than the broader factors that determine whether postsecondary opportunities are truly affordable. Lumina has taken a different approach, focusing instead on what students and families can afford to pay. Because it establishes a clear standard for when postsecondary education is affordable for students and families and when it is not, the Lumina Affordability Benchmark is an important new tool for policymakers and institutions to use to increase the attainment of quality postsecondary credentials.

Colleges and universities that close gaps in attainment and increase student success do not implement one or two programs or best practices to achieve these results. Rather, they take a holistic approach to create a culture focused on completion, equity, and quality. This includes a relentless focus on making postsecondary education more accessible by reducing institutional costs through improvements in productivity. Public policy must play a key role in ensuring student success by providing affordable educational pathways to all potential students, targeting financial support to encourage both institutions and students to focus on success and reduce or eliminate barriers that prevent timely progression to credentials.



A new, national system of transparent, high-quality postsecondary credentials.

Millions more Americans need the knowledge and skills that can only be obtained through postsecondary learning. They also need postsecondary credentials that make that learning transparent to employers, to education providers, and to themselves.

Unfortunately, the meaning of many current postsecondary credentials is not transparent to those who need to understand them. Because credentials link people to jobs, connect educational programs, and define career pathways, the need for credential transparency is particularly acute for today's students—racial and ethnic minorities, low-income students, adult learners, and first-generation students—who face even greater challenges navigating the complex and ever-changing credentialing landscape.

Lumina is working with a wide range of partners to develop new approaches to bring greater transparency to both degrees and non-degree credentials. The goal is to provide employers, education providers, and learners with credible, transparent, up-to-date information on the meaning and value of postsecondary credentials. This work includes development of new, national standards and platforms under development by the Credential Engine, as well as new ways for individual learners to organize and present documented and validated knowledge and skills to employers and education providers. These emerging approaches offer new ways to expand postsecondary opportunity and increase attainment through clearer linkages between credentials and careers; smoother transitions between education providers; and innovative, flexible pathways for all kinds of learners.



National expansion of competency-based learning.

Lumina's work has shown that many of the Americans in the *Some College, No Degree* population understand the value of a postsecondary credential and want to earn one, but face significant challenges in doing so. In many cases, these potential students hold credits from several institutions and have picked up valuable postsecondary knowledge and skills on the job or from alternative providers. Often their interests and circumstances have changed, and they require a different pathway to a credential than the one they started on.

Our work has shown that well-designed, high-quality competency-based programs—along with other innovative delivery models such as completion colleges and open-source online programs—can help these Americans obtain high-quality postsecondary credentials. The emerging national system of transparent postsecondary credentials offers new opportunities to expand these approaches so that all Americans have access to postsecondary pathways that meet their needs and lead to quality credentials.

For maximum effectiveness, competency-based programs should be connected to efforts to encourage adults with some college to return and complete a credential. State data systems—provided they are robust enough—can identify these students. The development and wide-scale implementation of new

approaches to recognize postsecondary learning however and wherever it is obtained would also help create pathways to competency-based postsecondary credentials. Together, these models can help millions of Americans obtain high-quality credentials.



Pathways to initial credentials—including certificates and certifications—for adults without postsecondary education.

In today's knowledge economy, where postsecondary skills are vital to getting and keeping a good job, all Americans need opportunities for postsecondary learning leading to a quality credential. But millions of Americans, including low-income working adults, now lack a viable way to earn postsecondary credentials. For the most part, working adults need shorter-term programs that lead to an immediate improvement in their quality of life. Postsecondary certificates (non-degree credentials usually issued by community colleges and other higher education institutions) and postsecondary certifications (industry-recognized credentials which represent demonstrated skills and knowledge in demand by employers) are valuable postsecondary credentials that can serve as this first rung on the ladder of economic opportunity.

Because most certificates are based on academic credit, they offer pathways to further postsecondary education, including degrees, and we already include them in the count toward Goal 2025. An additional 3.3 million Americans hold a postsecondary certification related to their current job as their highest credential. Getting a quality certification could help millions more obtain good jobs leading to careers and further education. Unfortunately, the postsecondary learning that certifications represent is not transparent, and the paths forward from them to further education and credentials, including degrees, are not clear. The national system of transparent postsecondary credentials that Lumina and its partners are working to create will bring transparency to certifications and allow us to count them toward Goal 2025.

However, it is essential that certificates and certifications not be a dead end for Americans from groups that have been underrepresented in higher education. Creating strong pathways to degrees for certificate and certification holders must be a high priority, and Lumina will work to develop these pathways and ensure they are broadly implemented across the postsecondary system. Indeed, quality certificates can be a key part of a credential ladder that motivates first-generation students to pursue more postsecondary education than they otherwise would have. Consequently, we will work to ensure that all first credentials, including certificates and certifications, offer clear pathways to further education, including degrees.

We will also work to bring opportunities to earn credentials to the most vulnerable and marginalized Americans, including those who are incarcerated. We believe all who leave prison should have a quality postsecondary credential—be it a certificate, certification or degree—so they have the best possible chance to re-enter society and become productive citizens.

The national system of transparent postsecondary credentials will allow the valuable skills learned by millions in the military, the skills brought to this country by immigrants, and the even greater array of skills and knowledge obtained on the job and through employer-proved training to be recognized and applied to high-quality postsecondary credentials. Lumina will work to ensure that the broader learning outcomes of job training—including those from employers and all publicly funded workforce-development programs—are recognized with appropriate credit that leads to certificates and other postsecondary credentials.

Learning obtained from libraries, museums, social service organizations, the military, volunteer activities, independent study using open, online courses, and numerous other providers can and should also count. Finding ways to recognize all of this learning would expand opportunity for millions of Americans who desperately need it.



An integrated quality assurance system for postsecondary learning.

Goal 2025 is based on the fact that millions more Americans need to obtain *high-quality* postsecondary credentials—those with clear and transparent learning outcomes leading to further education and employment. For this reason, quality lies at the heart of Goal 2025.

Current approaches to postsecondary quality assurance in the U.S. are complex and involve a range of actors. Accreditors focus on programs or institutions of a particular type or in a certain region. Through program review, accountability, and funding, states play a key role; but they vary significantly in their approaches. The federal role in quality assurance includes recognition of accreditors and state agencies, but also is performed through arcane regulatory rules and functions such as gainful employment, program integrity, and public reporting. Most of this system is focused on colleges and universities, but in the new postsecondary credentials landscape, much valuable learning is occurring outside traditional higher education.

Too often this disjointed approach to quality assurance inhibits innovation, leads to inefficient allocation of public resources, allows unscrupulous providers to prey on ill-informed and desperate students, pays inadequate attention to equity, jeopardizes the sustainability of successful approaches, and fails to give employers and students the assurance they need that credentials represent clear and transparent postsecondary skills and knowledge. This approach also lacks a focus on continual improvement which should be a primary benefit of a robust quality assurance process. But the biggest problem with our current quality assurance approaches is that they don't focus on the quality of credentials—the key to creating a student-centered postsecondary learning system.

Lumina will help develop an expanded and integrated system of quality assurance for postsecondary learning. Federal quality assurance will shift to an approach built on data on institutional performance regarding financial responsibility, equity, and employability. Current and new accreditors will play a critical role by ensuring transparency about learning outcomes and student success (including progression to further education and employment). This new approach to quality assurance will use new tools such as the Credential Registry, the Connecting Credentials Framework, the Degree Qualifications Profile (DQP), and Tuning-like processes. The use of these tools and processes will help ensure that all credentials awarded by postsecondary institutions represent skills and knowledge that can be described using common reference points and terms that are understood by policymakers and the public and recognized across education providers and employers.

Lumina's Strategic Approach

The key to Lumina's strategic approach is the public adoption of a challenging, time-limited goal in our first strategic plan. Goal 2025 directs us to engage the wide range of stakeholders who can and must take action

to increase postsecondary attainment and to identify—and where necessary, develop—the solutions that will build the postsecondary learning system the nation needs. Connecting this work is our commitment to the strategic use of data, reflected in our metrics. This commitment to evidence is integral to Lumina’s strategic approach, central to our effectiveness as a thought leader, and will not change under this strategic plan.

What will change, however, is our focus. The scale of change needed to build a new postsecondary learning system will require action on the part of numerous policymakers, educators, employers, and millions of individual Americans. Lumina can play multiple roles to create change at this scale, but it is through our role as *Thought Leader* that our influence will need to be most felt across the wide array of stakeholders who need to understand the urgency of Goal 2025 and commit to action to reach it. For this reason, developing the strategic approach to thought leadership is a particular priority of this strategic plan.

Our strategic approach to the work is built on five key organizational capacities: **stakeholder engagement, state policy, federal policy, innovation and scale, and impact and metrics**. The approaches are interdependent, with all five factoring into our work. Indeed, Lumina’s impact is in large measure determined by our ability to leverage our organizational resources in all five areas to advance effective solutions on a wide scale for implementation by multiple stakeholders.

Stakeholder Engagement

Lumina’s ability to identify, engage and mobilize those who need to take action to increase postsecondary attainment is a key organizational capacity, and under this strategic plan, we will work to make it even stronger. Lumina alone cannot reach Goal 2025, so we must strengthen our capacity to build coalitions among the numerous stakeholders who need to understand and support action to increase attainment. This includes coalitions of metropolitan regions, employers, higher education institutions and other providers, foundations, and state policymakers to develop and implement action plans. While we build our capacity to engage these stakeholders, we must in turn support their efforts to engage their multiple stakeholders, including students and families. In this way, efforts to increase attainment are magnified and can reach the scale needed to reach Goal 2025.

Among the stakeholders we must engage, those in higher education institutions are particularly critical. Presidents, trustees, and staff are essential, but our efforts will come to naught without the active engagement of teaching faculty in the national effort to increase postsecondary attainment. Faculty must lead the grassroots efforts needed to assure that all postsecondary credentials represent high-quality learning, and also play a key role in increasing completion and closing equity gaps in attainment.

We have known for some time that Lumina’s ability to frame issues and deliver strong messages to multiple audiences is not just a key asset, but is itself a strategy for advancing progress toward Goal 2025. To date, our strategic communication has been appropriately focused on Goal 2025 and the need to increase postsecondary attainment, but as we advance a clearer set of priorities for increasing attainment, it must also drive support for and adoption of the actions needed to implement them. Effective communication relies on content, and our strategic communications must be built on the quality of information developed through our work, policy agendas, metrics, and other tools. This content will be framed and organized into clear and compelling messages that are aimed squarely at advancing system change. These messages will be delivered via media strategies, convenings, and other engagement approaches to influencer audiences, including policymakers, business leaders, the media, and education stakeholders. Good ideas are important drivers of thought leadership, but we must back them up with strong evidence—particularly on the effectiveness of solutions.

We must not lose sight of the fact that reaching Goal 2025 requires millions of prospective students, with the support and encouragement of their families, to invest the time, money, and effort required to obtain a quality postsecondary credential. Lumina has a limited capacity to reach this enormous audience through our direct efforts, but effective thought leadership can help create a postsecondary learning system that does. We must reach all Americans with the message that success in postsecondary education is both necessary to their future and within reach.

State Policy

While Lumina is recognized for its thought leadership at the state level, we can and must be even more effective in this role to enact stronger state policies that will increase postsecondary attainment. State policy is key to reaching Goal 2025 because only states can enact the large-scale systemic change necessary to build the postsecondary learning system the nation needs.

Under this strategic plan, the cornerstone of Lumina’s state policy work will be a clear and compelling policy agenda. That agenda will focus on large-scale implementation of the learner success agenda; concrete efforts to close gaps in attainment for underrepresented groups; increasing the capacity of public postsecondary systems to serve all potential learners, particularly adults; the inclusion of all quality postsecondary credentials in comprehensive state plans for increasing attainment; and building integrated data systems to guide and strengthen efforts to increase attainment. We also believe state policy can play a central role in supporting the implementation of integrated action agendas by communities, employers, and higher education institutions and systems.

Of course, the key state role in postsecondary education—and the source of state’s potential influence over the results we get from the postsecondary learning system—stems from its role as funder. State funding is still the cornerstone on which public postsecondary education is based, but it needs to adapt so that it offers the kind of incentives that students and institutions need to increase attainment. Lumina has played a key role in the development of outcomes-based funding, and we will continue to press for the implementation of next-generation approaches across the states. Outcomes-based funding can help increase student success and close equity gaps in attainment when systems are designed and implemented to meet certain criteria. Those criteria include: funding is aligned with state goals and priorities; differences in institutional missions are recognized; and incentives are in place to increase attainment of quality credentials among underrepresented populations. We will also work with states to eliminate low-performing developmental education, improve community college transfer systems, and enact other policies that will close equity gaps and increase student success.

Lumina’s ability to engage state policymakers is a key capacity for advancing action. Strategy Labs, our learning-based approach to spurring policy change in states, will be enhanced to support a student-success-oriented, outcomes-driven policy agenda. We will also continue to engage policymakers directly through state advisors and Lumina staff.

Federal Policy

Lumina is well positioned at the federal level to advance a constructive policy agenda to increase postsecondary attainment. Over the last few years, we have used the concept of *Today’s Student* to reframe policy discussions away from a focus on institutions and outmoded notions of students that have inhibited necessary changes in federal policy. We have also advanced a set of guiding principles that have made a major contribution to reframing policy discussions. As a result of these and other efforts, Lumina

is now established at the federal level as a credible and trusted leader on issues related to attainment. Now is the time to advance a specific action agenda that capitalizes on Lumina's recent efforts.

Though state policy must remain the primary focus of our public policy efforts, we can and must play a central role in advancing new, much-needed federal approaches to these issues. Constructive action at the state and local levels will not be possible without a supportive federal policy environment—one that encourages innovation, focuses on quality, and assures the availability of essential data on the performance of the postsecondary system.

Goal 2025 also has significant ramifications for the federal role in making postsecondary education affordable for students, increasing the attainment of adult learners, improving credentialing, and many other issues addressed in this strategic plan. The attainment focus requires that funding from the federal level be directed toward improving affordability, closing equity gaps, and increasing student success.

We will support a clean sheet approach to reauthorization of the Higher Education Act in the next Congress—an approach that targets student aid to increase timely completion of quality postsecondary credentials, expands innovative approaches such as accelerated degree programs and competency-based education, and closes gaps in degree completion and attainment for underrepresented students.

We will continue to advance Lumina's federal policy priorities through our own direct efforts, by supporting the work of aligned policy organizations, and by partnering with others to strengthen advocacy for increased attainment. However, our work under the current strategic plan has shown that specific legislative proposals are needed to make the necessary changes in federal policy clear to policymakers. We will find appropriate ways to develop these proposals and advocate for their adoption.

Innovation and Scale

Effective approaches to increase postsecondary attainment often exist but are not implemented at a large enough scale. But in some cases, current approaches do not meet the need or will not scale and new ones need to be developed. The nationwide expansion of competency-based education is one such approach, as are the wide range of new approaches to credentials that will be made possible with greater transparency about their meaning. Developing these new and innovative approaches necessary to create the postsecondary learning system that can help us reach Goal 2025 is a key organizational capacity of Lumina.

Our ability to support innovation and R&D through grants and program-related contracts will continue to be important, especially for the range of new approaches needed across public policy and the wide range of organizations and institutions in the postsecondary landscape. Our growing involvement in impact investing is now allowing us to tap into an enormous capacity for innovation from an entirely new set of social and private sector entrepreneurs. Lumina has also obtained key insights by studying approaches that have been developed and implemented in other countries. We will continue to find ways to engage internationally—to identify promising approaches, better understand common challenges, and advance Lumina's thought leadership.

While foundations have a unique ability to support research and analysis on problems and issues, identify promising and innovative approaches, and test their effectiveness in a range of settings, they rarely have the financial resources to support innovation at the scale needed. Consequently, the long-term sustainability and scalability of innovation must be a consideration from the earliest stages of the work. This need to develop sustainable and scalable solutions, as well as Lumina's thought leader role, makes

the collection and use of evidence of effectiveness an essential component of our process for developing and advancing innovative solutions. Frankly, this is where we and the field must do better. Under this strategic plan, our work on innovation and R&D will be grounded in data and evidence. We must use data to understand the need and context for action, the effectiveness of different approaches, and the impact of our work. Projects will be designed to be done as quickly as possible, with the objective of obtaining answers to clear questions about moving solutions to scale. Where new approaches are needed, we will develop and test potential solutions in a process akin to “rapid prototyping” as used in design-led approaches.

All of this work will draw on our capacity for strategic engagement and will be designed to support our thought leadership role.

Impact and Metrics

Over the time frame of this strategic plan, we must focus on the impact of our work and the progress toward Goal 2025. To that end we will continue to develop and implement comprehensive metrics on increasing postsecondary attainment—both to guide our efforts and to advance the field through thought leadership. The metrics will begin with stronger measures of attainment, including national and state data on certificates and certifications and interim targets for each of the three populations identified in the first section of the strategic plan. To guide our work in real time, Lumina has developed a predictive model of postsecondary attainment with targets for the factors that will affect future attainment rates, including enrollment, completion, and equity gaps. All of our work will be designed with specific outcomes and corresponding metrics that link to the predictive model and allow us to track our effectiveness and impact. Where necessary, we will develop new data sources to support this metrics framework and strengthen the model.

As the time to reach Goal 2025 grows shorter, the need to accelerate progress becomes critical. To this end, Lumina’s strategic approach must be designed to maximize flexibility, nimbleness, and speed. Metrics help us—not just by keeping both us and our partners focused on the same results, but also by assuring we know what to look for in our shared work, what results mean, and what is important.

It’s Time for Results

Over the course of our first two strategic plans, we have made substantial progress toward Goal 2025. With clear and abundant evidence, we now know that to increase postsecondary attainment to the levels we need, we must work with many partners to build an equitable postsecondary learning system out of our current disparate and disconnected systems. Fortunately, the need to increase postsecondary attainment is now widely recognized by the American people, and state and local leaders throughout the nation are mobilized to take action.

It is time to move to action on solutions that dramatically increase attainment to reach Goal 2025. The comprehensive system of postsecondary learning that Lumina is committed to help build will allow all Americans to obtain credentials representing the knowledge and skills they—and the nation—need. It is the key to meeting the nation’s growing demand for talent.

LUMINA FOUNDATION STRATEGIC PLAN FOR 2017 TO 2020

Lumina's Strategic Approach	Postsecondary Learning System for All Americans	Road Map to Goal 2025	Goal 2025
2017 TO 2020	2017 TO 2020	By 2020	By 2025
Stakeholder Engagement	A postsecondary system where the top priorities are completion of quality credentials, affordability, and closing equity gaps	Increase attainment by 5.9 million above current rates of production Increase 25–64 attainment rate from 45.3% to 51.2% Increase 25–34 attainment rate from 47.2% to 53.3%	Increase attainment by 16.4 million high quality credentials above current rates of production and reach 60%
State Policy	A new, national system of transparent, high-quality postsecondary credentials	By 2020	By 2025
Federal Policy	National expansion of competency-based learning	500,000 more degrees and certificates to traditional-aged students	Increase attainment among traditional-aged students by 4.8 million
Innovation and Scale	Pathways to initial credentials—certificates and certifications—for adults without postsecondary education	By 2020	By 2025
Impact and Metrics	An integrated quality assurance system for postsecondary learning	2 million more degrees and certificates to returning adults with some postsecondary education but no credential By 2020	Increase attainment among returning adults with some postsecondary education but no credential by 6.1 million By 2025
		3.4 million more certificates and certifications to adults with no recognized postsecondary education	Increase attainment among adults with no recognized postsecondary education by 5.5 million



Lumina[™]
FOUNDATION

30 S. Meridian, Suites 700-800
Indianapolis, IN 46204
800.834.5756

