Strategic Collaboration and Partnerships

Use this tool when

Addressing holistic credit mobility priorities that cannot be solved by one office, institution, system, or sector alone and you need to determine who must act, what each partner must contribute and why, and how the collaboration will improve learner mobility.

What you should leave with

A specific learner problem statement; a prioritized partner coalition; clear roles and commitments; a partnership-health baseline; and a 90-day action plan.

Active collaboration is one of five necessary supports for holistic credit mobility. Beyond creating stronger relationships, active collaboration supports all core principles. Collaboration is critical as states, systems, and institutions work to count validated learning, prevent repeated learning, connect learning across siloed sectors, provide clear guidance, and design programs that accommodate diverse pathways. The strongest collaborations also coordinate the policy, practice, technology, and data that can enable students to carry forward what they have already learned and take the shortest viable route to the credential they seek.

Using this Tool

This tool, comprising five workshop activities, will guide you towards constructing a coalition aimed at addressing a key learner problem. The activities progress sequentially, but, depending on the status of your current credit mobility initiatives and collaboration, can be started at any point. We encourage all users to start with Step 1, which helps structure the learner mobility problem that you hope to address via collaboration.

Section	Purpose
1. Define the Learner Mobility Problem	Define the learner mobility friction, desired outcome, and relevant principles.
2. Map What Must Change Across the Five Necessary Supports	Identify policy, practice, technology, collaboration, and data advanced via collaboration.
3. Identify and Prioritize the Partners who can Change the Barrier	Scan internal and external partners and prioritize by ability to enact change and readiness to act.
4. Design the Collaboration around a Shared Learner Outcome and Commit to the Next 90 Days	Create a one-page charter to center learner outcomes and stipulate roles, actions, decision rights, meeting cadence, and strategy.
5. Complete a Targeted Partnership Health Assessment	Use a 14-item targeted assessment to maintain momentum.

Step 1. Define the Learner Mobility Problem

Before identifying partners and collaborators, read the holistic credit mobility framework and review your self-assessment results. With these in mind, begin by stating the learner pain points you are working to address. These may include inconsistent validation of prior learning, knowledge gaps among advisors, repeating accomplished learning, anemic relationships with cross-sector partners, or other bottlenecks identified in the report.

From this initial brainstorming, this tool can help cumulatively scope the problem and design a strategy for collaboration. Be concrete so that you

can observe whether the problem improves. Remember, it's okay to start small. This activity can be completed multiple times to align with various initiatives.

Define a learner problem statement

Students with [type/source of learning] currently experience [barrier] because [root cause], resulting in [time, cost, momentum, or completion consequence].

Which learners are affected?

Which learners encounter this barrier most often?

What are the top desired learner outcomes?

What should become easier, faster, clearer, or more portable?

What evidence supports this conclusion or is lacking?

What data, student feedback, workflow evidence, or recurring cases show that this problem exists?

Next, select the principle(s) this work must advance

- ☐ Principle I Count validated learning regardless of source
- ☐ Principle II Avoid repeated learning of the same content
- ☐ Principle III Link learning across K–12, higher education, and workforce
- ☐ Principle IV Provide clear guidance on how learning will count towards a specific degree
- ☐ Principle V Maximize program flexibility to accommodate diverse learning pathways



Quick check

If you cannot explain how collaboration will improve at least one principle for learners, the partnership goal is still too broad. Most high-value credit mobility efforts will touch more than one principle.

Step 2. Map What Must Change Across the Five Necessary Supports

Active collaboration is the primary support you will leverage. Use this scan to identify the conditions the partnership must create, sustain, or change. Complete only the rows that matter to your learner problem.

Support	Key Questions	Current Successes	Existing Barriers	Potential Actions
Effective Policy	Which rules, requirements, agreements, standards, funding incentives, or decision authorities contribute to the barrier?			
Responsive Practice	Which workflows must change: intake, evaluation, faculty review, transcript processing, advising, degree audit, exception handling, or handoff between offices?			
Supportive Technology	Which system, tool, public resource, equivalency database, or degree-planning function must be aligned or improved?			
Active Collaboration	Which relationships, governance structures, cross-office routines, or shared decisions are required?			
Data & Measurement	What data must be shared or reviewed to understand the barrier and know whether the solution is working?			

Step 3. Identify and Prioritize the Partners who can Change the Barrier

For advancing holistic credit mobility, internal partners are often as important as external partners. These partners can range across sectors and functions, including actors who can authorize change, implement it, maintain the underlying data or technology, validate learning, guide learners, and represent learner experience.

Identify: Prospective Partners Sweep

The table below outlines common partners and the areas they often intersect with holistic credit mobility. This list, while not exhaustive, provides a starting off point for aligning partner roles.

Holistic Credit Mobility Function	Potential Partners
Policy / decision authority	State boards or agencies; system offices; presidents/provosts; faculty governance; academic affairs; legal/policy leaders
Learning validation / curriculum	Faculty; department chairs; curriculum committees; CPL leaders; credential providers; military or workforce subject-matter experts
Student-facing practice	Admissions; advising; transfer centers; registrar; enrollment; financial aid; student success; K–12 counselors; workforce navigators, CBOs
Technology / data stewardship	IT; institutional research; data governance; SIS/degree audit owners; transfer-technology teams; vendors or data exchanges
Cross-sector pathway partners	K–12 districts; community colleges; universities; technical colleges; employers; workforce boards; industry associations; military organizations; community-based organizations, HEPs and Department of Corrections
Conveners / champions / resources	Consortia; intermediaries; foundations; chambers; trusted champions; funders; community leaders
Learner voice	Transfer students; adult learners; military-connected learners; dual-enrollment students; student organizations; alumni, justice-impacted students

Begin to list partners in the table below, noting how they support your learner problem, what principles and supports they advance, and their

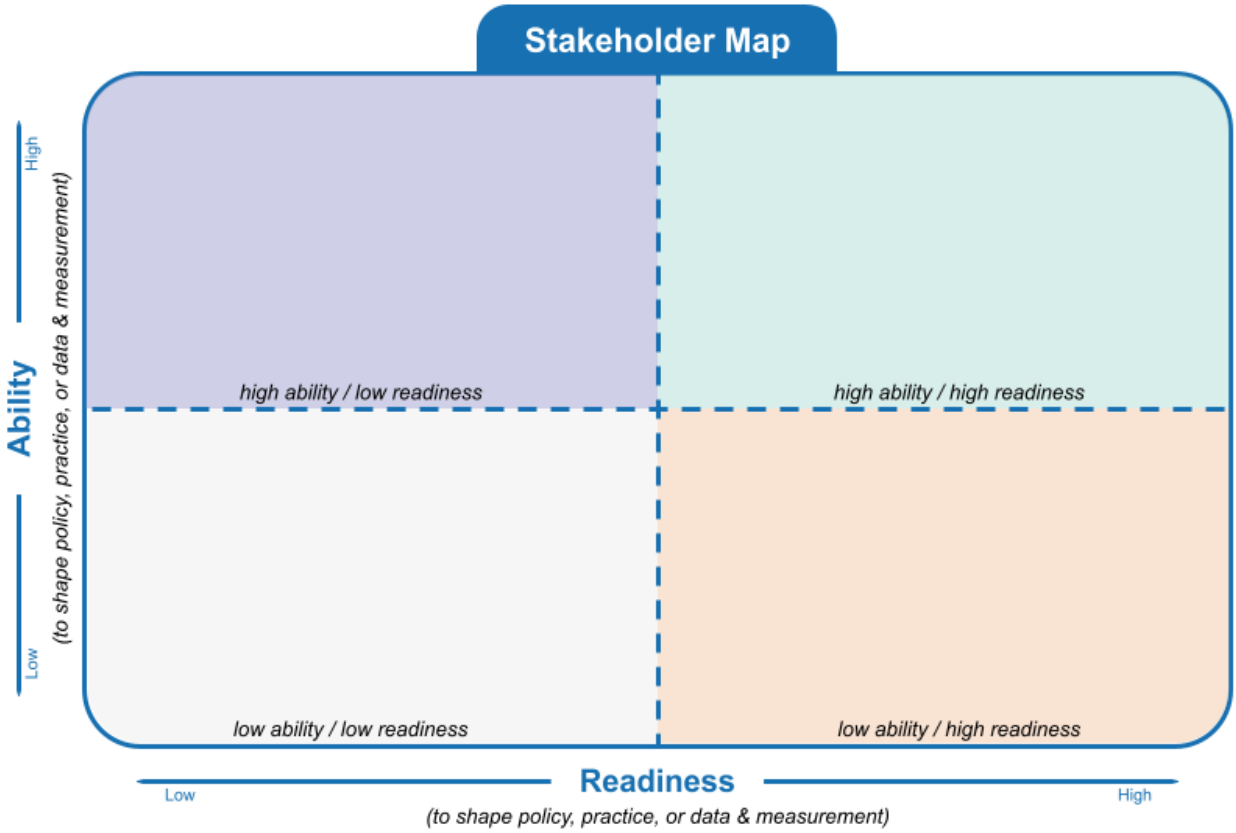
authority or capacity to influence your initiative. Then, add in detail on your existing relationship (strong: work together regularly; moderate: have worked together before; emerging: have not worked together previously).

Partner Name	Why Needed for This Learner Problem?	Principle(s) Addressed (I / II / III / IV / V)	Support(s) Unlocked (Policy / Practice / Tech / Collab / Data)	Authority / Capacity	Relationship (Strong / Moderate / Emerging)

Prioritize: Map Holistic Credit Mobility Ability and Readiness

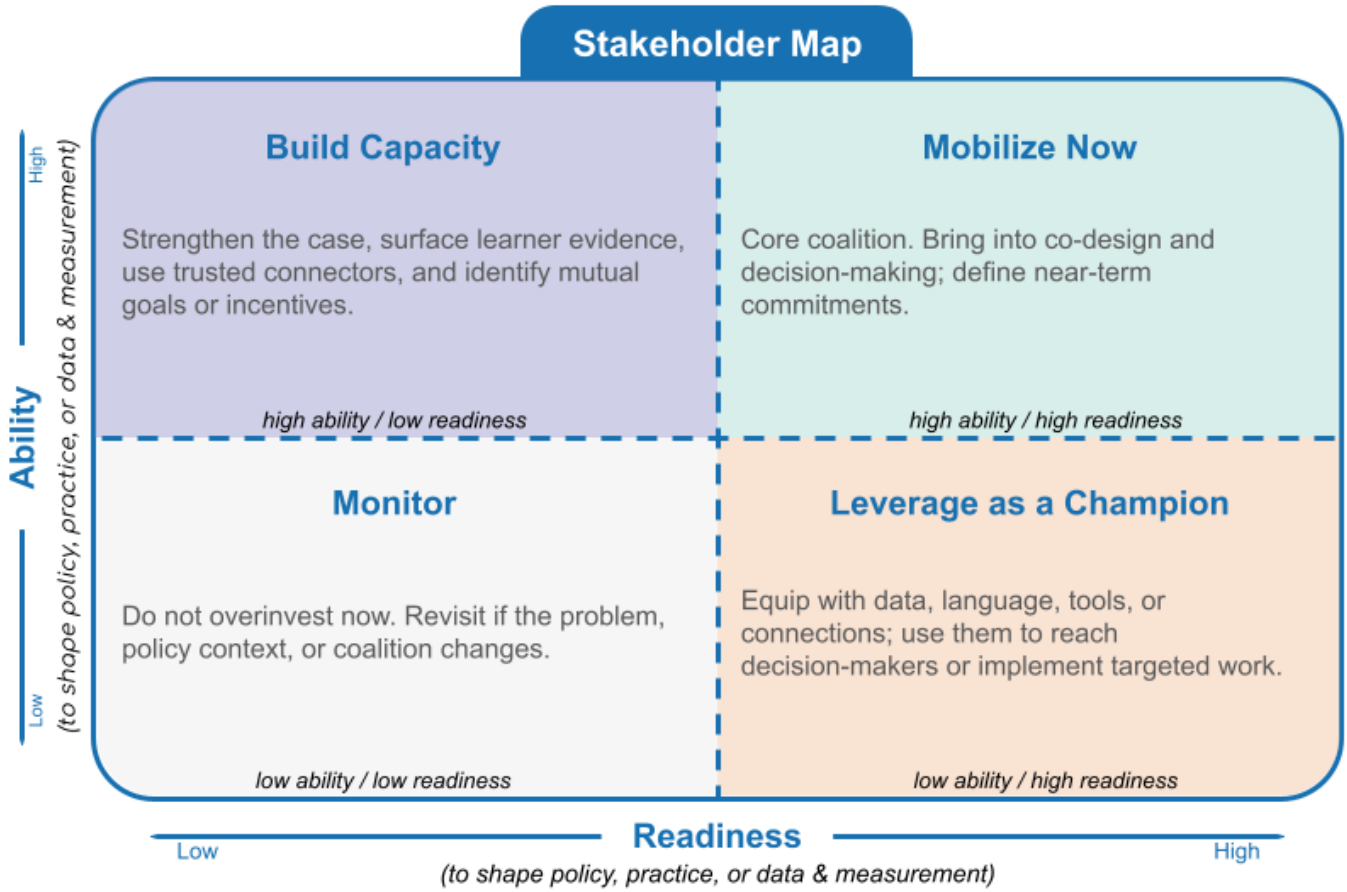
After identifying key existing and potential stakeholders, evaluate them relative to one another in order to understand who are the most engaged and important to your problem. One way to accomplish this is to map stakeholders within a "Boston Square" and visually capture the degree to which each stakeholder has resources and influence (ability to act) over the relevant issues against their level of interest or incentive to engage (readiness to engage). The goal is not to identify the "most powerful" stakeholder in the abstract; it is to identify who can materially remove this specific barrier and how ready they are to engage to address it today.

Ideal partners will be in the top right quadrant with strong ability and readiness. However, it is rarely so clear cut. There may be cases where: 1) significant awareness-raising is required to turn a highly-influential but low-interest stakeholder into an interested potential partner or 2) significant capacity development is necessary to turn a stakeholder with high interest but low influence into a stronger partner. In other words, the initial results of this mapping exercise are subject to change and can guide strategy around which partners you need to motivate or strengthen your casemaking to.



Define: Curate Your List of Necessary Partners

Now that you have enumerated potential partners and triaged them, as they pertain to your specific issue, take stock of the Boston Square results above. Who is in each quadrant? Are there collaborators you did not expect amongst the critical group of potential partners? How strong are your existing relationships with the key partners? The table below sets forth suggested strategies and actions for the partners you identified, based on their location within the grid.



Step 4. Design the Collaboration around a Shared Learner Outcome and Commit to the Next 90 Days

Identifying collaborators is only half the battle; now you need to leverage them. Use this two-page charter with the partners you have prioritized in Step 3. A durable collaboration makes the learner outcome explicit, assigns the supports, clarifies roles and responsibilities, and agrees on how progress will be reviewed. Take your learner problem statement from page [1] and refine it now. Invert the premise: instead of addressing this as a problem, reframe it as a desired outcome or set of outcomes. (For further treatment of structuring initiatives and increasing buy-in, see *Making the Case for Holistic Credit Mobility*[1].)

Shared Learner Outcome

Within [*time period*], learners with [*type/source of learning*] will be able to [*observable mobility outcome*].

Establish: Partners in the Core Coalition

Now that you have solidified your learner problem statement, establish roles and responsibilities. Spend time early setting initial protocols around decision making, communication, expectations, and ongoing working relationships. The table below presents key considerations that feed into these more mundane yet essential elements of successful credit mobility partnerships.

[1] See Making the Case for Holistic Credit Mobility here: https://sr.ithaka.org/making-the-case-for-holistic-credit-mobility/.

Primary Role	Key Considerations	Partner(s)	Owners(s)	Immediate Next Step
Decision rights	Which decisions can this group make? Which require faculty governance, executive, board, agency, or legislative action?			
Communication rhythm	What routine meetings, working sessions, backchannels, and shared tools will keep implementation moving?			
Contribution expectations	What staff time, data, technology, funding, subject-matter expertise, or convening capacity will each partner contribute?			
Learner voice	How will affected learners inform design, test clarity, or surface implementation problems?			
Escalation	How will the group address conflicts, stalled decisions, inconsistent implementation, or competing priorities?			
Scale / maintenance	What will be piloted first? What evidence would justify expansion? Who will maintain the work when leaders, priorities, or resources change?			

Enhance: Choose Measures that Reveal Whether Mobility Improved

With the right actors in place, develop a list of measures to measure success. These can be shared in common or partner-specific. Improving each should address your learner problem statement. Refer to the Data Readiness and Prioritization Worksheet attached to the Key Performance Indicators to Track Learner Success tool[2] and report here the top three metrics you will treat as goalposts.

[2] See the KPI tool here: https://sr.ithaka.org/key-performance-indicators-to-track-learner-success.

Priority KPI	Why This KPI Matters in Our Context	Partner(s)	Owners	Immediate Next Step
KPI 1				
KPI 2				
KPI 3				

Enact: Commit to the Next 90 Days

At this point, you have clearly identified how you will leverage the necessary supports to advance the desired learner outcome and set forth the guardrails of your collaboration cadence and structure. It's time to act. Choose no more than three priorities to take immediate action on to quickly build evidence, unblock implementation, or generate buy-in. These should be actionable, measurable steps; do not end with "let's continue the conversation." See Module A in *Making the Case for Holistic Credit Mobility* for additional steps in developing and communicating your plan.

This final table is the action component of your collaboration's initial guiding charter. Though foundational, it is a living document: refine it over time through feedback with key stakeholders.

Priority / Barrier	Action	Partner(s)	Support(s) Addressed	Owner / Target Date	Near-Term Output	Evidence of Progress
Priority 1						
Priority 2						
Priority 3						

Next review date: _____

What would make us expand or scale?

_____

What would make us change course or stop?

_____



Final check

Can every core partner explain (1) the learner problem, (2) their roles and responsibilities, (3) the evidence the group will use to judge progress, (4) the support(s) being advanced, and (5) their next action? If not, refocus the collaboration before adding more partners or activities.

Step 5: Complete a Targeted Partnership Health Assessment

Periodic assessments of partnership health can be a key tool for measuring alignment, mutual benefit, ability to meet goals, and sustainability. The assessment below, adapted from The Intersector Toolkit: Tools for Cross-Sector Collaboration,"[3] contains key considerations for quantifying the health of an individual partner relationship.

Choose one cross-sector partner that you have identified as critical to your holistic credit mobility project to focus on while completing the following assessment. This brief partner assessment probes fundamental aspects

[3] "The Intersector Toolkit: Tools for Cross-Sector Collaboration," *The Intersector Project*, https://intersector.com/wp-content/uploads/2017/08/The-Intersector-Project-Toolkit.pdf.

of cross-sector partnership design, structure, leadership, and administration. Using the scale below, reflect on the extent to which you agree or disagree that your partnership meets the following criteria before tallying your scores.

A strong relationship is necessary but not sufficient. This assessment asks whether the partnership is aligned to a learner outcome, has the authority and operating structure to act, coordinates the relevant supports, and uses evidence to improve.

Assessment Scale

1. Completely Disagree
2. Somewhat Disagree
3. Somewhat Agree
4. Completely Agree

Partner Identified: _____	Response
Holistic Credit Mobility Principle Alignment	
Partners share a specific learner mobility problem and a clear, observable learner outcome.	
Partners can name the holistic credit mobility principle(s) this collaboration advances and how success would improve the learner journey.	
The collaboration is compatible with partner missions while keeping learner mobility as the common purpose.	

Governance & Roles	
The coalition includes the people or organizations with authority to make the policy, program, practice, technology, or data decisions the work requires.	
Roles are explicit across the needed holistic credit mobility functions: policy authority, validation/curriculum, practice, guidance/pathways, technology/data, convening, and learner voice.	
Faculty, staff, cross-sector partners, and learners are engaged at the points where their expertise or experience is necessary.	

Time, staff, data, technology, funding, and other contributions are clear and equitable enough for partners to meet their commitments.	

Operations & Trust	
Partners use reliable communication and working routines that support decisions and follow-through, not simply information sharing.	
Shared guidance, workflows, tools, and messages are consistent enough that learners receive reinforcing answers across partners.	
Partners have a trusted process for resolving tensions, escalating stalled issues, and adapting when constraints or priorities change.	

Evidence & Improvement	
Partners track measures that show whether validated learning is recognized, applied, visible, portable, and moving learners efficiently toward credentials.	
Partners share and review data on a regular cycle, including learner feedback, and use the evidence to change policies, practices, pathways, or tools.	

Sustainability	
Responsibilities are embedded in roles, agreements, plans, or routines so the work can survive leadership, staffing, resource, and priority changes.	
Partners have identified what should be piloted, maintained, expanded, or stopped based on evidence and changing learner needs.	
Tally Scores Here	_____

Understanding Your Score

Score	Interpretation	Action
43–56	Strong	Sustain momentum, document shared practices, maintain evidence routines, and plan for leadership transitions and scale.
29–42	Developing	Identify the two lowest-scoring areas. Select one concrete change for each and assign a 90-day owner and measure.
14–28	Emerging / Fragile	Revisit the learner problem, coalition membership, decision authority, roles, communication routines, and cross-support commitments before expanding the work.

About Ithaka S+R

Through research, collaboration, and innovation, Ithaka S+R informs policy, guides strategies, and builds evidence-based tools to broaden access to postsecondary education, improve student and workforce outcomes, and advance scholarship.

Ithaka S+R is part of ITHAKA, a nonprofit with a mission to improve access to knowledge and education for people around the world. We believe education is key to the wellbeing of individuals and society, and we work to make it more effective and affordable.

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