

Designing with Equity in Mind:

An Action Toolkit for Competency-Based Education



Higher education is meant to be an engine of economic opportunity and mobility; yet, for too long, institutions have struggled to produce equitable access and outcomes. People of color, and Black, Latinx, and Native American populations in particular, remain underrepresented in higher education pathways that lead to economic advancement.

Competency-based education (CBE) is an approach that can educate, equip, and empower Black, Latinx, and Native American learners to earn the credentials needed for career advancement. In a 2021 op-ed, Charla Long of C-BEN and Stacey Clawson of JFF argue that “education based on competencies, rather than time alone, has the power to deliver equitable economic advancement.”¹ We believe that high-quality CBE has the potential to lead to more equitable labor market outcomes for learners because it incorporates many of the features we know to be critical for learner success: flexibility, comprehensive supports, recognition of existing knowledge and skills, and defined pathways from education to work. To fully realize this potential, programs must a) incorporate strategies to recruit and retain learners from populations historically underrepresented in higher education, and b) lead to credentials of value in the labor market. CBE programs are designed to promote mastery of competencies. If those competencies are aligned with labor market demand, graduates will be better positioned for near-term career outcomes and long-term advancement.

In “How Competency-Based Education May Help Reduce Our Nation’s Toughest Inequities,” developed by JFF with support from Lumina Foundation, author Stephanie Krauss writes “... by making competence a necessary component of completion, learners engage in deeper learning and graduate prepared for future education or employment opportunities. At scale, this type of teaching and learning [can] help close equity gaps while raising college completion rates and improving graduates’ lifetime outcomes and earnings. Yet, if CBE programs are not designed intentionally to support and serve these learners, the approach could unintentionally worsen our nation’s toughest inequities. To reach its potential, CBE programs must link directly to career pathways that promote graduates’ social and economic stability and advancement, and always lead to credentials of value.”²

¹ Competency-based learning can power an equitable recovery. October 21, 2021. In Higher Ed Dive.
<https://www.highereddive.com/news/competency-based-learning-can-power-an-equitable-recovery/608228/>

² (Lumina Foundation, 2017)
<https://www.luminafoundation.org/resource/how-competency-based-education-may-help-reduce-our-nations-toughest-inequities/>

KEY TENETS OF EQUITABLE CBE DESIGN

To develop the workshop series for the CBE Equity Collaboratory, C-BEN and JFF used the following key tenets of equitable CBE design outlined in the JFF paper.

CBE programs must be culturally responsive

Culturally responsive programming is imperative for supporting students, particularly students of color. It focuses on a pedagogy that recognizes the importance of including students' cultural identities and contributions through the learning process. Characteristics of culturally responsive teaching might include: communication of high expectations, learning outside of dominant cultures and framing, student-centered instruction, and utilizing the instructor as a facilitator.

CBE programs must be learner-centered

CBE programs that are learner-centered allow students to advance based on each student's unique ability to master competencies and skills associated with course content at their own pace, regardless of the class environment. Specific course instruction that is learner-centered is likely to be more collaborative and community-oriented, reducing top-down instructor-to-student approaches to learning. As a result, instruction and course structure may better support a wide variety of learners and learning abilities, leading to stronger outcomes.

CBE programs must be high-quality

High-quality CBE programs include eight specific elements: 1) demonstrated institutional commitment to and capacity for CBE innovation; 2) clear, measurable, meaningful, and integrated competencies; 3) coherent program and curriculum design; 4) credential-level assessment strategy with robust implementation; 5) intentionally designed and engaged learner experience; 6) collaborative engagement with external partners; 7) transparency of student learning; and 8) evidence-driven continuous improvement.

CBE programs must be competency-driven

Competency-driven programs focus on actual student learning, and the application of that learning, rather than time spent in class or on material. Learners' progress is measured when they demonstrate their competency through a system of rigorous assessments, meaning they prove they have mastered the knowledge and skills required for a particular competency or area of study. When higher education institutions use competencies as the currency of learning, programs are better able to connect, compare, and validate learning across multiple contexts using a shared competency language.

CBE programs must be grounded in labor market demand and data, and lead to credentials of value

In order to best support students for a future career, CBE programs must be shaped by local labor market information (LMI) that can help inform the kinds of content and competency mastery employers are looking for from graduates. LMI can help programs identify which industries are most prominent in their local region, who their largest employers are and what skills they are looking for, the occupations that are in decline and the individuals who need retraining, as well as specific details on average wage per occupation. CBE programs must also provide students with credentials that both educators and employers recognize and value. LMI and employer partnerships can help institutions build stronger credentials that are reflective of the industries the program is preparing students for.

Institutions must offer strong pre-program, career planning, and post-graduation placement supports

Successful CBE programs typically offer robust and equitable support services for students. As CBE programs are typically offered online, it is essential for students to have access to a similar level of support that traditional on-campus students are offered. Recruitment should involve robust community partnerships and a commitment to access and equity. Onboarding and career planning may involve learner-centered design, one-to-one coaching with administrative staff, and strategic employer partnerships. Post-graduation placement supports may involve career coaching to help with interview prep, job application submission, and deeper employer connections.

PURPOSE OF THE CBE EQUITY ACTION TOOLKIT

In 2020, JFF and C-BEN came together to mutually support colleges and universities in demonstrating that quality CBE programs, when grounded in labor market value and implemented with racial equity at the forefront, can eliminate disparities in educational outcomes of students from historically underserved and underrepresented populations. Over 30 colleges and systems signed on to a nine-month workshop series designed to explore the components of equitable, labor market-aligned CBE and the key CBE tenets described above. This Action Planning Tool, originally developed to support CBE Equity Collaboratory participants and derived from content and themes explored in the workshop series, is now available to any college, university, or system seeking to use CBE as a vehicle for equitable economic mobility.

This action planning tool is designed for colleges at various stages of developing a CBE program as a strategy to increase equity. It was designed for use by a cross-functional team that brings together representatives from the academic program, faculty, admissions, student services, and institutional research. However, individual faculty and staff from any functional area or academic program may use this as a tool for identifying a cross-functional team that can work toward equity goals using CBE. Key components of this action plan include: problem identification, goal setting, methods and strategies, and resources needed. This toolkit will walk you through a process to identify the barriers to success for learners of color and create an action plan to create a CBE program that centers learners and removes systemic barriers.

Considerations for Action Plan Use

Prior to beginning, it is recommended that college teams review the action plan and associated prompts ahead of time. Discuss what sections you'd like to start with first, or which sections feel most vital to the planning of your CBE program.

When creating your team, consider how the team reflects the demographics of the population(s) you hope will enroll in your CBE program. You may also consider including a student or recent graduate in some discussions.

Additionally, it is important in an equity initiative for your team to have clear definitions of key terms. In the process of developing this toolkit, the following terms were used: “equity,” “competency-based education,” “competency,” and “mastery/proficiency.” You will see later in the toolkit that each institution should define these terms specific to their own context.

“Equity is an ongoing, collaborative, and data-driven process. Every participating CBE program should have access to campus level data with the kind of student groups who enter. As a starting point, the campus level data should shed light on student groups’ profiles and equity graphs, if any, that do exist.”

—Dr. Eddie Comeaux

Associate Professor & Graduate Advisor, Founder/Executive Director of the Center for Athlete's Rights and Equity (CARE), U of California, Riverside

1. SYSTEMIC BARRIER IDENTIFICATION

Identify the nature and extent of the problem or opportunity you plan to address or continue to address through CBE programs. Include qualitative and quantitative data on the scope and magnitude of the barriers students currently face.

This section will help college teams clearly define the problem in terms of who is not well served by the current program model(s) and what aspects of the current program model(s) are not working for defined student populations, as well as identify any additional barriers to success that should be considered in the program design.

Discussion Prompts

<p>For what population of learners is your institution or program currently producing inequitable outcomes? What “opportunity gaps” exist?</p> <p>“Opportunity gaps” are any outcomes (learning, persistence, completion) that differ by race, gender, income status, or social identities important to institutional context. This should be informed by college or system data. For example, have you identified inequities in completion or labor market outcomes? Are there new learner populations you want to serve?</p>	
<p>What aspects of your current academic program structure pose the greatest barriers for your priority population? What data informs your answer?</p>	
<p>How do you anticipate that the defined barriers will be removed for the priority population(s) by offering a new or redesigned CBE program? What literature or evidence leads you to this conclusion?</p>	
<p>What do you know about the barriers to access that priority populations face at your institution? What data informs your answer?</p>	
<p>What are the postsecondary and labor market outcomes of the priority population(s) you have identified?</p>	
<p>How do the problems identified align with your institution and department’s strategic priorities and overall mission?</p>	

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Action Planning

Priority	Key action steps	Who is responsible?	Milestones & deadlines
Gather enrollment, retention, and completion data, disaggregated by race/ethnicity, age, gender, and additional social identities to understand where there are opportunity gaps.			
Conduct surveys or focus groups with priority populations to gather qualitative data on the current student experience, as well as with those who are not currently enrolled.			
Based on quantitative and qualitative data collected, conduct a mapping exercise to identify common barriers to success across the student experience (connection, enrollment, and retention through completion).			
Facilitate sensemaking sessions with stakeholders and students to confirm that barriers are appropriately identified and categorized.			
Define specific features of a CBE program that must be in place to remove barriers and support student success. Aspects may include flexibility, hybrid or online, delivery, embedded student supports, equitable assessment, etc.			
Add other priorities here.			

2. GOAL SETTING

Based on the quantitative and qualitative data gathered in part 1, identify clear goals for your new or redesigned CBE program. Consider how you can make your goals SMART goals:

Specific: Make your goal as narrow and focused as possible for more strategic planning

Measurable: Your goal should include a quantitative measure so that you're able to assess and document progress

Achievable/Attainable: Your goal should be realistic and possible to obtain

Relevant: Align your goal with your team's values, vision, and overall mission

Time-bound: Set a deadline at the end of your goal so that you can track your progress

For example: By expanding our community partnerships and integrating culturally relevant pedagogy for our existing competency-based welding program, our college will recruit, retain, and graduate x percent more Black and Latinx learners by ____ (date). This aligns with our institution's strategy priority to reduce equity gaps in the completion of credentials with labor market value.

SMART GOAL	[Enter goal here]
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Once you have defined your goal you can start to consider the key inputs and activities, as well as the outputs and outcomes that will let you know if you are on track. You may want to revisit this section after completing the rest of the sections.

Discussion Prompts

<p>INPUTS What resources (financial, human, material) are needed to implement your new or redesigned CBE program?</p> <p>In the example above, the college might flag faculty professional development and a new partnerships coordinator as key inputs.</p>	
<p>ACTIVITIES What are the key activities required to achieve your goal?</p> <p>In the example above, the college might include planning sessions with community partners and employers or curriculum development.</p>	

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<p>OUTPUTS What are some of the tangible outputs of your activities? These can serve as near-term indicators of success.</p> <p>In the example above, the college might develop new marketing materials that better target new communities, or they may develop new partnerships with outside organizations who can help with recruitment.</p>	
<p>OUTCOMES What short-term (6-12 months) changes do you anticipate occurring as a result of your activities?</p> <p>In the example above, a short-term outcome might be increased enrollment of Black, Latinx, and Native American students.</p>	
<p>IMPACT What overall long-term effect(s) (1-5 years) do you anticipate occurring as a result of your CBE equity work?</p> <p>For example, as a result of progress made in the first 6-12 months, the college should anticipate an increase in successful student outcomes, from retention to graduation to job placement.</p>	

3. METHODS AND STRATEGIES

Please use the sections below to think through CBE methods and strategies that are needed in order to support your CBE program development. This section builds on key topics for outlining your methods and strategies, including defining CBE, utilizing LMI, curriculum planning and development, creating student-centered design and support systems, and job placement.

“It is important to have a working definition of equity. Equity is not sameness. Equity is a process. Equality is the ideal outcome.”

—Dr. Eddie Comeaux

Associate Professor & Graduate Advisor, Founder/Executive Director
of the Center for Athlete’s Rights and Equity (CARE),
U of California, Riverside

A. Definitions

How does your institution or system define the following? If there is not an official definition, college teams should work together to create one.

Equity	
Competency-Based Education	
Competency	
Mastery/Proficiency	

B. Core Program Features

Consider how your CBE program is or will be distinctively different from current academic offerings in order to create more equitable outcomes. What are the hallmark features? You might consider this from multiple viewpoints—student, faculty, and student services staff.

“Time is a source of inequity in our higher ed system and yet we’ve built a whole system on the credit hour.”

—Paul LeBlanc

President, Southern New Hampshire University

For colleges that are redesigning an existing CBE program, some of the features may stay the same.

Feature	Traditional/current CBE academic offerings	CBE program or redesigned CBE program
Flexibility in pacing		
Personalization of content		
Curriculum development process		
Culturally responsive pedagogy		
Consistency across faculty and sections		
Assessment approach		
Faculty model		

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Employer engagement		
Coaching/advising model		
Student supports		
Career placement		

C. Labor Market Information

In order for CBE to lead to more equitable career success, programs must be tightly aligned with the labor market and designed to connect graduates with good jobs with advancement potential. This section will help you identify the data needed to make informed decisions about credentials, competencies, and employer partnerships.

	What data sources currently inform this? E.g., local labor market data, state eligible training provider lists, student data, employer input, community partners (such as Urban League), and industry competency frameworks.	What additional data sources would be helpful?
Program/credential selection		
Competencies and level of mastery needed		
Assessment strategy		
Program refinement		

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Discussion Prompts

<p>In what ways do you think using up-to-date LMI will help your program meet or continue to meet the intended outcomes in supporting students and leading them to stable employment?</p>	
<p>Who are the key players (internal and external) you'll need to involve to access updated LMI reflective of your local area and disaggregated by priority populations? Are there new stakeholders directly connected to the priority population that you can involve to understand nuances related to occupational segregation and wage discrimination.</p>	
<p>In your context, how can programs grounded in labor market demand and data help lead to credentials of value for students? What is the connection between data and equity and why is this important for CBE programs?</p>	
<p>What are some potential barriers you may experience to accessing updated and current LMI?</p>	

Proposed Program

Summarize what you have learned from LMI and employer input:

<p>Target credential(s) and occupations</p>	
<p>Typical starting wages</p>	
<p>Occupational outlook for your region</p>	
<p>Confirmed/potential employer partners</p>	

D. Recruitment

Quality student engagement and racially diverse enrollment starts with thoughtful and inclusive recruitment strategies. This section urges you to consider the kind of students you are wanting to support through your CBE program and how your recruitment strategies effectively cater to this population.

Discussion Prompts

<p>For each priority population, what learner personas will you use to inform the design of the CBE program?</p>	
<p>What culturally relevant characteristics about the priority population are important to consider during recruitment?</p> <p>This could be demographics (including age), career goals, time constraints, primary language, or other factors that would influence your recruitment strategy.</p>	
<p>How will you reach the priority learner population with strategic marketing messages tailored to them?</p>	
<p>What partnerships could help you reach your intended learner population?</p>	

E. Curriculum Development and Learning

An important part of student retention will involve a culturally sensitive and responsive curriculum and learning opportunities that support a wide variety of learners. This section will help CBE programs consider their curriculum development—what needs to be incorporated, enhanced, or redesigned.

Discussion Prompts

Describe your approach to competency-based curriculum development (e.g., backward design). If you have a CBE curriculum development process, how can that process be improved	
Describe how culturally responsive pedagogy and other equitable instructional practices will be incorporated into your CBE program. This should include addressing both culture and accessibility in use of all aspects of program delivery.	
Describe how learners have / will have meaningful access to faculty subject matter experts.	
How are learners made aware of what is needed to demonstrate competence and earn a credential?	
How is learner progress toward program outcomes monitored? How is learner progress made visible to the learner?	
How will the institution/system communicate to external stakeholders what graduates can do beyond course listings and grades to external stakeholders (e.g., comprehensive learner records)? If you have an existing program, please include examples.	
What kinds of professional development might faculty and curriculum and assessment design staff need to implement plans?	

F. Supporting Students in CBE Programs—from Awareness through Completion and Beyond

Pre-program supports might include onboarding, orientation, advising to help students select the right program, help with financial aid and non-academic supports, counseling, child care, and other pre-program coaching.

Supports during enrollment might include proactive advising, coaching, tutoring, career exploration, continuation of non-academic supports, counseling, child care, etc.

Post-program supports might include resume prep, mock job interviews, job search assistance, internships, career fairs, and other ongoing coaching.

	Describe the supports available	What departments/roles/ partners are involved?
Pre-program		
During enrollment		
Post-program		

Discussion Prompts

How are students made aware, or, more importantly, how are supports embedded, at each phase of the curriculum?	
What data can you use to assess the effectiveness of these supports for creating more equitable outcomes?	
What professional development might advisors and support staff need to put your plans into action?	

ACTION PLANNING

Priority	Key action steps	Who is responsible?	Milestones and deadlines
Example: Revise current orientation materials to include an overview of the student experience in CBE.			

4. RESOURCES NEEDED

This section will help college teams think through the specific programmatic resources that are needed in order to develop and/or maintain CBE programs at the institution. Please use the questions below to identify key resources needed to support your CBE program development and delivery. Key resources include but are not limited to program timeline, evaluation, key stakeholders, and budgeting. This section will also allow you to expand on what potential barrier(s) may surface and proposed solutions.

A. Key Stakeholders

Please provide detailed information on the various key stakeholders who will be integral to your CBE program development. Given a focus on equity, be sure to include individuals who are from or who work closely with the priority population(s). Be sure to include the individuals' qualifications and experiences that make them the right fit for the success of the project.

[C-BEN's Quality Framework for CBE Programs User's Guide](#)

[C-BEN's Employer Engagement Best Practices Toolkit](#)

Stakeholder	Position/representation (aculty, student, employer, external partner, priority population, etc.)	Interest & issue areas (Areas of expertise or interest that this stakeholder represents)	Next steps for engagement
Registrar			
Financial aid			
IT			
Institutional research			
Student services			
Admissions			
Employer partners			

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Stakeholder	Position/representation (aculty, student, employer, external partner, priority population, etc.)	Interest & issue areas (Areas of expertise or interest that this stakeholder represents)	Next steps for engagement
External audiences such as chamber of commerce, workforce development boards, community organization, etc.			
Senior leadership			
Add other key stakeholders			

B. Budgeting

Please consider reviewing the following links to help you think through core elements of a CBE budget, including resources needed for successful implementation and completion.

[NCHEMS Competency-Based Education Cost Model](#)

The National Center for Higher Education Management Systems (NCHEMS) has developed a cost tool related to developing competency-based education programs for institutions, with support from the Lumina Foundation. This cost model is designed to help institutional leaders unpack the activities, costs, and revenue related to starting and maintaining CBE programs.³

[C-BEN ROI Estimator User Guide](#)

The Return on Investment (ROI) Estimator was designed to help calculate and predict the ROI and break-even point for CBE programs and potential new workforce partnership programs.

Things to consider when budgeting:

- Professional development and personnel costs, including faculty release time
- Consultants
- Data access (e.g., Burning Glass)
- Technology

Discussion Prompts

What resources do you need now to get the work started?	
What is your comprehensive budget for long-term sustainability?	

³ (NCHEMS, 2021) - <https://nchems.org/projects/cbe-cost-model/>

C. Program Timeline

Based on the information identified above, please use the chart below to map out your program timeline.

Priority	Key action steps	Who is responsible?	Milestones and deadlines	Progress to date

5. ADDITIONAL CONSIDERATIONS

A. Program Evaluation

Consider what priority metrics and descriptive data you will track to assess whether your CBE program is achieving the intended goal.

[CBE Student Outcomes Data Collection](#)

	Is this consistently tracked? Are trends reported out? If not, what changes are needed to make this happen?	Who is currently involved in using this data to inform program planning?	What are some early indicators that will help you understand the impact of your CBE program?
Race/ethnicity			
Retention			
Completion			
Pell status			
Time to completion			
Pacing			

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	Is this consistently tracked? Are trends reported out? If not, what changes are needed to make this happen?	Who is currently involved in using this data to inform program planning?	What are some early indicators that will help you understand the impact of your CBE program?
Median cumulative tuition			
Employment within 6 months in field of study			
Employer satisfaction			
Student satisfaction			

Additional Discussion Prompts

<p>How do you plan to evaluate this project? How will you monitor your expected outcomes and any applicable quantitative metrics? How will you assess progress and adjust the timeline, as needed?</p>	
<p>What are some potential barriers that could hinder or slow project completion? What are your proposed solutions for overcoming these barriers?</p>	
<p>Are there particular accreditation standards that are unique to your accreditor?</p>	
<p>How do you need to involve faculty? Is there a faculty union and/or senate that will need to approve?</p>	
<p>What role should your admissions and marketing/communications team play in this effort?</p>	

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ACKNOWLEDGMENTS

We would like to acknowledge the team that contributed to this guide: from C-BEN, Amber Garrison Duncan, Charla Long, and Yedid Minjares; and from JFF, Stacey Clawson, Lee Domeika, and Rachel Pleasants McDonnell. We also thank the editorial and design teams from JFF and C-BEN. We especially want to thank all of the CBE Equity Collaboratory participants; your input and feedback has greatly helped us refine this tool. We also want to acknowledge the numerous presenters who contributed to the workshop series.



About JFF

JFF is a national nonprofit that drives transformation in the American workforce and education systems. For nearly 40 years, JFF has led the way in designing innovative and scalable solutions that create access to economic advancement for all. www.jff.org



About C-BEN

C-BEN is a network of institutions, employers, and experts committed to unlocking the potential of competency-based learning to ensure education and training is more flexible, responsive, and valuable. C-BEN is the go-to source on competency-based learning—home to experts, researchers, practitioners, and institutional leaders who are reimagining education and training systems and helping others design and build high quality programs.

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