Institutional Self-Assessment

This resource is designed to help institutional leadership teams assess their current readiness across the five domains of employer-friendly practice. We provide an overview of the domain, followed by a self-assessment tool. Additional information and resources are linked, for those who want to go deeper.

The self-assessment process is most useful when completed collaboratively by a cross-functional group that includes senior academic, financial, enrollment, and workforce leaders rather than by a single individual. When different team members assign different scores to the same item, it reveals operational and accountability gaps, areas where institutional processes depend on individual effort rather than shared design.

For each item, assign a traffic light rating:

- **Green** - This is consistently in place, well-understood across relevant offices, and functioning as intended.
- **Yellow** - This is partially in place, inconsistently applied, or dependent on individual effort rather than institutional systems.
- **Red** - This is not in place, or significantly below the standard needed to support effective employer partnerships.

At the end of each domain, tally your ratings to produce a domain readiness level. Overall institutional readiness is a composite of all five domains.

Foundational Actions and Mindsets

Across our interviews, the institutions that employers described as their best partners shared something that had little to do with program design or resources. They had leaders with the agency to create change in their organizations and who took employer engagement seriously as a strategic priority, staff who understood what employers were trying to accomplish, and a shared sense of what success looked like for both sides. Everything else: the billing workflows, the advising systems, and the data practices, worked better because that foundation was in place.

In our research, employers consistently described the difference between institutions that treated employer engagement as a strategic priority and those that treated it as optional. Employers rarely struggled with program quality, but they were concerned about whether institutional leaders understood why employers were investing in education, whether institutional leaders moved with urgency, whether there was

Did You Know?

Employers invest in education for many reasons, and they're not thinking only about skill development. Employers are looking to improve talent retention and create advancement pathways, as well as strengthening their employer value proposition, brand, and employee experience. Nearly 60% of employers support education programs because their own employees demand it!

alignment between leadership and staff, and whether their college partners were willing to define success in terms employers could recognize. Under all these concerns was a constant: employers treated credential completion as an important accountability signal.

#	Assessment Items – Foundational Actions and Mindsets	Green (2)	Yellow (1)	Red (0)
	Connecting to Business Imperatives			
F1	Senior leaders have an active understanding of the employer's goals driving each partnership, and that information is documented and accessible to relevant staff.	☐	☐	☐
F2	Staff who work with employers are trained to understand common employer needs and priorities in the region.	☐	☐	☐
F3	A clear process exists for capturing employer goals at the start of each new partnership and keeping that information current as the relationship evolves.	☐	☐	☐
	Leadership, Urgency, and Institutional Commitment			
F4	Employer partnership is named as an institutional priority in strategic planning documents and internal communications.	☐	☐	☐
F5	The institution has set clear response time standards for employer inquiries and tracks whether those standards are being met.	☐	☐	☐
F6	A senior leader is formally responsible for employer partnership outcomes, with the authority to act on contracts, pricing, and operational issues without unnecessary delay.	☐	☐	☐
	Asset and Relationship Mapping			
F7	The institution has conducted a recent inventory of employer relationships across all functions, including workforce development, academic departments, career services, advancement, and faculty.	☐	☐	☐
F8	Employer relationship information is recorded in a shared system accessible to all relevant staff, not in individual inboxes or department-level files.	☐	☐	☐
	Consistent Points of Contact and Internal Coordination			
F9	Each active employer partner has a named relationship manager and a designated backup contact, and employer partners know who to reach.	☐	☐	☐

#	Assessment Items – Foundational Actions and Mindsets	Green (2)	Yellow (1)	Red (0)
F10	Key information for each employer partner, including relationship manager, contract terms, pricing, contacts, and communication history, is recorded in a shared system that all relevant staff can access.	☐	☐	☐
F11	When a relationship manager leaves, there is a clear plan for transferring employer relationships so that continuity and trust are maintained.	☐	☐	☐
	Shared Definitions of Success and Mutual Accountability			
F12	Each partnership includes a written, mutually agreed definition of what success looks like, including minimum acceptable outcomes.	☐	☐	☐
	Total	___	___	___

18-24: You're working with a strong foundation. Focus on maintaining consistency and institutionalizing what is working.

12–17: Your foundations are likely missing some important components. Identify which gaps are most consequential and prioritize those first.

0–11: Your institution has significant gaps in its foundational work with employers. Focus first on the "red" factors above that seem most consequential. Operational improvements in other domains are unlikely to hold without addressing these conditions first.

Responsive Business and Financial Practices

When we asked employers what most quickly undermined their confidence in an institutional partner, operational and financial friction emerged as a recurring theme. Some examples: receiving an invoice six months late with no itemization; watching an employee get placed on a financial hold despite a signed employer agreement; fielding questions from students who were misdirected by college staff.

These small problems can accumulate quickly and create big issues, stopping a working learner from registering for their next course or getting in the way of an employer trying to justify the program to a skeptical financial leader. Among many of the employers we interviewed, these experiences defined the partnership as much as anything that happened in the classroom.

Did You Know?

About 42% of employers support direct pay to institutions on behalf of working learners, while 58% offer reimbursement. Yet, offering direct payment has an impact on program success: organizations that provide direct payment are more than four times as likely to report their program is successful!

For many employer partnerships, business and financial practices (engaging under contract or agreement, exchanging money for tuition) are a real test of institutional readiness. Employers may be aligned on mission and enthusiastic about program design, but their experience and confidence can deteriorate once contracts are signed and money is exchanged and the real work of enrolling, learning, and progressing begins.

Friction around business practices is one of the fastest ways to undermine trust. Employers are accustomed to predictable vendor relationships. When colleges and universities cannot meet business expectations, and when institutional structures are poorly fit for working learners, employers question whether the partnership can scale or sustain.

Did You Know?

The IRS tax code allows for working learners to receive up to $5,250 in employer support for tuition as non-taxable income. For the first time in decades, that amount will increase based on the cost of living each year. When an employer caps their education benefit at $5,250, this is why.

#	Responsible Business and Financial Practices	Green (2)	Yellow (1)	Red (0)
	Pricing Transparency			
1.1	The institution can produce a complete proposal for any program, including tuition, fees, and materials, within 1-2 business days.	☐	☐	☐
1.2	Program costs have been modeled against common employer support thresholds, including the federal tax-exempt cap of $5,250 for tuition assistance, and pacing options are available to help employees stay within those limits.	☐	☐	☐
1.3	Pricing information is presented in a format that works for employer budget planning, not just in per-credit or per-term academic terms and reflects if prices vary based on delivery and location of courses delivered.	☐	☐	☐
1.4	Staff who interact with employers can explain, in plain language, how the institution sets prices and makes financial decisions.	☐	☐	☐
	Invoice Structure and Timing			
1.5	Employer invoice templates include the employee name, program, term, billing period, and an itemized cost breakdown in language that employer finance teams can follow.	☐	☐	☐
1.6	Invoices are sent on a predictable schedule that aligns with how employers manage payments, not just with the academic calendar.	☐	☐	☐

#	Responsible Business and Financial Practices	Green (2)	Yellow (1)	Red (0)
1.7	Employers with multiple sponsored learners can receive a single consolidated invoice with a summary total and itemized detail.	☐	☐	☐
	Employer Direct-Pay Processing			
1.8	Written agreements with employer partners spell out when payment is due, who is responsible if payment is late, and how disputes are handled.	☐	☐	☐
1.9	Employer-sponsored learners are flagged in the student information system so that financial holds are not applied while employer payment is pending.	☐	☐	☐
1.10	Balances owed by employers are tracked separately from individual student accounts, with a designated contact for employers sponsoring multiple learners.	☐	☐	☐
	Total	___	___	___

15-20: Your institution has strong financial infrastructure. Monitor for consistency across partners and over time.

10–14: There are some operational gaps present in your business and financial partnerships with employers. Prioritize items that are most directly affecting learner enrollment and employer payment cycles.

0–9: Your employer partners are likely experiencing significant friction with your financial and business practices, and their trust is at risk. Look as quickly as possible at the “red” areas above and take action first to mitigate any immediate issues, and then fix the structural concerns.

Working Learner-Centered Academic Practices

The employers we spoke with were not asking institutions to lower academic standards or design programs around employer convenience. What they told us they wanted (and frequently did not find) was evidence that institutions had genuinely thought about what it means to be a working adult trying to earn a credential while holding down a job and managing a family. Rigid schedules, requirements that are hard to understand and plan around, and programs that bear little visible connection to workplace skills, look like indifference and bureaucratic thinking to employers, even if they were borne out of tradition for institutions.

Did You Know?

Employer spending on training is significant and growing. In 2025, employers reported $102.8 billion in training expenses, averaging over $800 per employee and representing an increase of almost 5% from the previous year.

Ensuring that curricula are responsive to employer needs is where the partnership either delivers on its promise or quietly falls apart. Academic design determines whether employer partnerships deliver meaningful workforce outcomes. Employers want predictability, efficiency, and visible skill development aligned with workplace realities, without sacrifices in academic quality and learning outcomes.

#	Working Learner-Centered Academic Practices	Green (2)	Yellow (1)	Red (0)
	Course Availability and Sequencing			
2.1	Programs that serve working learners offer evening, weekend, or online options and academic and support services that accommodate employees across common work schedules, including shift workers.	☐	☐	☐
2.2	A multi-year course schedule for workforce-aligned programs is published and shared with employer partners, and required courses are not cancelled without an alternative option in place. Outdated program and course information are scrubbed from websites and company catalogs.	☐	☐	☐
2.3	The institution reviews annually which courses are most frequently causing delays in learner progression and reports findings to academic leadership.	☐	☐	☐
	Credit for Competencies and Skills			
2.4	Working learners can get clear, written information on how their professional experience (past and current) may count toward program requirements, including estimated timelines and costs, before they commit to a course of study.	☐	☐	☐

#	Working Learner-Centered Academic Practices	Green (2)	Yellow (1)	Red (0)
2.5	Policies for recognizing learning from work experience are consistent across departments, with clear criteria and a defined process that learners and employers can understand before enrollment.	☐	☐	☐
2.6	Timelines for processing credit for prior learning requests are clearly defined, and outcomes are tracked to ensure consistency across departments.	☐	☐	☐
2.7	Employer partners are engaged regularly to identify where workplace learning and experiences align with program requirements, and that input shapes how work-based learning is recognized.	☐	☐	☐
	Competency Transparency and Skills Alignment			
2.8	Program-level learning outcomes are written in plain language and published where employers and prospective working learners can find them.	☐	☐	☐
2.9	Learning outcomes for workforce-aligned programs are connected to recognized industry skill frameworks and/or certifications.	☐	☐	☐
2.10	At least some workforce-aligned programs offer a formal, consistently administered pathway for learners to demonstrate competency and connect that learning into a credential, and is clearly communicated to learners and employer partners.	☐	☐	☐
	Total	____	____	____

15-20: Your institution's academic practices are well-aligned with working learner needs. Focus on maintaining employer input and expanding competency recognition pathways.

11-14: There are some meaningful gaps present in how your institution is meeting working learner needs. Identify which are most visible to employers and most consequential for learner progression.

0-9: It's likely that your institution's academic systems present significant barriers for employer-sponsored and working learners. Identify the highest-priority and most-actionable items for initial action, and start work on longer-term transformations.

Actionable and Predictable Data

One of the things that surprised us in our research was how modest employers' data requests were. They were not asking for real-time dashboards or detailed academic records. They wanted to know, at reasonable intervals, whether their employees were progressing and when they were likely to finish. They wanted to be told, and not to discover after the fact, when someone was falling behind and they wanted that information consistently, in a format they could use.

What they described receiving instead was manual spreadsheets assembled on request, inconsistent formatting from term to term, and often flat-out refusal to provide completion projections. For employers who are trying to make workforce planning decisions and defend continued investment to their own leadership, that gap is not a minor inconvenience.

Did You Know?

Companies that invest in employee education often experience significant returns, saving money through increased retention, improved talent attraction, and internal mobility. Check out cases from Chipotle, Starbucks, McDonald's, and Medtronic.

Data practices determine whether employer partnerships are sustainable. Employers invest in education programs because they expect measurable impact: improved retention, increased promotion readiness, strengthened internal pipelines. Without timely, consistent, and usable data, employers cannot evaluate that impact or defend continued investment.

While some institutional leaders might push back on data sharing as a responsibility for the employer and employee, employers are simply not set up to collect this data from students in an accurate and timely way. Instead, employers want colleges and universities to work in partnership, focused on the success of their working learners.

#	Actionable and Predictable Data	Green (2)	Yellow (1)	Red (0)
	Standardized Progress Reporting			
3.1	Students receiving employer sponsorship have given written consent for the institution to share relevant information with their employer, and that consent is collected as part of enrollment.	☐	☐	☐
3.2	A standard progress report template is in use, with consistent fields and formatting across all employer partners and terms, including projected completion dates.	☐	☐	☐
3.3	Key terms used in employer reports, such as enrollment status, credits completed, and projected completion date, are defined consistently and applied the same way across all partners.	☐	☐	☐

#	Actionable and Predictable Data	Green (2)	Yellow (1)	Red (0)
3.4	Progress reports are delivered on a predictable schedule that aligns with how employer partners plan and make decisions.	☐	☐	☐
3.5	Recurring employer data reports are generated automatically from institutional systems rather than assembled manually each term.	☐	☐	☐
	Timeliness and Responsiveness			
3.6	There are defined turnaround standards for responding to employer data requests, and compliance with those standards is monitored.	☐	☐	☐
3.7	Employers are notified promptly when a sponsored learner withdraws or does not register for the following term.	☐	☐	☐
3.8	Student data systems flag warning signs, like missed assignments, persistent absence, or falling grades.	☐	☐	☐
3.9	Employer partners receive a summary each term of how their sponsored learners performed, including completion rates and any agreed success metrics.	☐	☐	☐
3.10	Retention and completion rates for employer-sponsored learners are tracked for each employer and reviewed by senior leadership on a regular basis.	☐	☐	☐
	Total	___	___	___

15–20: Your institution has strong data infrastructure. Focus on automation, consistency, and integrating workforce metrics into strategic planning.

10–14: Your institution has partial data capabilities, but employers are likely experiencing some friction. Prioritize standardization and timeliness in your communications and data-sharing with employers. Inconsistency can be as damaging as absence.

0–9: Data practices are a significant vulnerability in your employer partnerships. Employers cannot evaluate their investment, and their trust may be at risk.

Integrated Student Support

Even when the financial systems are working well, the academic model is well-designed, and the data is flowing, partnerships can still fail if working learners don't get the right support at the right time. Working learners navigate two performance systems simultaneously: their workplace and the institution. Support models designed for traditional, full-time students do not automatically translate to working adults balancing employment, family, and education. While many colleges, especially community colleges and regional comprehensives, serve and prioritize students with competing priorities, they don't necessarily account for the employers' role.

Did You Know?

About 30% of employers provide coaching and advisory services to learners participating in education programs. Programs that employers view as successful are nearly twice as likely to include advising services as unsuccessful programs, creating clear value for employers.

Employers generally assume their institutional partners are monitoring learner progress and intervening before problems become withdrawals. In our research, that assumption was rarely warranted at the scale employers needed. "There is an assumption that the university is catching people who are falling behind," one employer told us. "But I don't know that there is a good mechanism to communicate. That's the gap."

#	Integrated Student Support	Green (2)	Yellow (1)	Red (0)
	Pre-Enrollment Planning and Readiness			
4.1	Employer-sponsored learners receive an advising appointment before registering for courses, separate from the standard intake process.	☐	☐	☐
4.2	Every employer-sponsored learner receives a written degree plan with multiple pacing options and estimated completion timelines before they enroll.	☐	☐	☐
4.3	Incoming students receive a transfer credit/degree audit to determine their fastest and most cost-efficient path to a credential.	☐	☐	☐
4.4	Employer-sponsored learners receive a financial planning session that accounts for all forms of support (employer, federal, state, veteran's, etc.) and covers assistance caps and the cost impact of dropping a course.	☐	☐	☐
4.5	Working learners and their employers receive clear information about any factors that could affect cost or time to completion, such as prerequisite requirements or the need for additional academic preparation, before enrollment begins. Any required placement testing occurs early in this process.	☐	☐	☐

#	Integrated Student Support	Green (2)	Yellow (1)	Red (0)
4.6	The institution and employer partners communicate consistent messages to learners about workload expectations and scheduling flexibility before enrollment begins.	☐	☐	☐
	Ongoing Advising and Risk Intervention			
4.7	Dedicated advisors are assigned to employer cohorts, with manageable caseloads that allow for proactive outreach rather than only responding to problems.	☐	☐	☐
4.8	Early warning triggers are active for employer-sponsored learners, and advisors are required to follow up when a trigger is activated.	☐	☐	☐
4.9	A written protocol defines which learner events are shared with employers, on what timeline, and with appropriate consent in place.	☐	☐	☐
4.10	First-term withdrawal data for employer-sponsored learners is analyzed regularly and used to improve how the institution prepares and supports learners before they start.	☐	☐	☐
	Total	____	____	____

15-20: Your institution has strong support infrastructure for working learners. Verify that systems are functioning consistently across all employer cohorts, not just flagship partnerships.

10-14: Your employer-supported learners are likely experiencing some gaps. Early alert and pre-enrollment advising are typically the highest-leverage starting points.

0-9: It's likely that your institution's support systems are not adequately adapted for employer-sponsored learners. Attrition is likely higher than it needs to be. Start first with identifying patterns in student actions, including withdrawals, and take action where the greatest number of students are impacted.

Overall Institutional Readiness

Domain	Maximum Score	Your Score
Foundational Actions and Mindsets	24	
Responsive Business and Financial Practices	20	
Working Learner-Centered Academic Practices	20	
Actionable and Predictable Data	20	
Integrated Student Support	20	

Calculating Your Overall Score

80–104: Strong Readiness. Your institution has built substantial infrastructure for employer partnership. Focus on identifying remaining inconsistencies, sustaining what is working, and continuing to deepen employer relationships. Share your practices! Other institutions can learn from you.

55–79: Developing Readiness. Meaningful capacity exists but gaps are present across multiple domains. Use domain-level scores to prioritize where to focus first. Look for high-Red domains as the most urgent starting points, and for quick wins within Yellow items that can build momentum.

0–54: Early-Stage Readiness. Significant gaps exist that are likely affecting employer relationships and working learner outcomes, even if those effects are not yet fully visible. Begin with the Foundational domain and treat operational improvements in other domains as a medium-term agenda. Leadership commitment and resource investment are prerequisites for progress.

Interpreting Your Results

Start with disagreement. If members of your team scored the same item differently, that is information. Discuss it before averaging. The disagreement often points to inconsistent practice: something that works in one department or for one employer partner, but not systematically and consistently across the institution. It can also indicate a difference in perception across levels and roles in the institution.

Prioritize Red items in the Foundational domain first. Operational improvements in the other domains are less likely to hold if the foundational conditions are not in place. A change in billing process that works for one partner but not others, or a data improvement that stalls because no one has authority to make it permanent, often reflects a foundational gap rather than a technical one.

Treat Yellow as the action zone. While Red items may surface the biggest issues for longer-term attention, Yellow items are often where the most immediate progress is possible: policies that can be strengthened, informal practices that can be formalized, and individual efforts that can be institutionalized.

Use the detailed practice guide. This guide includes detailed activities that can support improvements in each domain, as well as case studies, templates, and other resources to help along the journey.

Revisit annually. This assessment is most useful as a repeated measure. Completing it once identifies priorities. Completing it each year tracks whether institutional practice is actually improving and keeps employer partnership on the leadership agenda.