



# Expanding Institutional Capacity for Employer Engagement in Credential Innovation

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# Executive Summary

**H**igher education can no longer afford to treat employer engagement as peripheral to credential innovation. As employer demand for flexible, skills-focused learning continues to grow, colleges and universities face increasing pressure to move faster, collaborate earlier, and design offerings in closer partnership with industry. This guidebook captures how UPCEA, with support from Walmart, responded to that challenge by advancing a practical, field-tested model for strengthening institutional capacity for University-to-Business (U2B) engagement.

From October 2024 through December 2025, UPCEA led the second phase of a multi-year national initiative focused on helping institutions build stronger, more sustainable employer partnerships in support of short-form credentials and workforce-aligned learning. Grounded in UPCEA's **Hallmarks of Excellence in Credential Innovation**, and specifically **Pillar 3: University-to-Business Stakeholder Engagement**, the initiative moved beyond research and assessment into implementation. The goal was clear: equip institutions with the frameworks, tools, and peer support needed to engage employers more strategically and design credentials that are more responsive to workforce needs.

The initiative produced a set of high-value, interconnected resources for the field. These include the **U2B Design Framework**, which integrates UPCEA's employer engagement tenets with human-centered design principles, an institutional **readiness assessment**, a **practical toolbox** of methods for research, ideation, prototyping, and iteration, a **pilot mentorship model**, and a **five-week pilot course** that helped practitioners apply these concepts in real institutional settings. Together, these outputs offer institutions both a roadmap and a set of actionable tools for strengthening employer partnerships, regardless of their starting point.

Several important lessons emerged from this work. First, effective employer engagement begins with internal readiness. Institutions need clearer pathways for cross-unit coordination, stronger internal

champions, and more shared language around workforce needs and credential value. Second, successful partnerships require a genuine shift from program-first thinking to employer-centered design. Institutions that lead with employer context, validate needs early, and build trust through iterative follow-through are better positioned to create durable, mutually beneficial relationships. Third, practitioners benefit enormously from peer learning, mentorship, and access to concrete tools that can be adapted immediately within their own environments.

A distinctive strength of this initiative was its practitioner-led design. Five Peer Learning Leaders from diverse institutional and employer contexts helped co-create the framework, shape the tools, mentor peers, and facilitate the pilot course. Their involvement ensured that the resulting resources reflect the realities of institutional complexity, regional workforce variation, and the practical demands of employer engagement. The initiative's "teaching hospital" model, where experienced leaders learn, build, and teach simultaneously, also created a multiplier effect that extends the impact well beyond the original cohort.

For UPCEA member institutions, this guidebook offers more than a summary of one project. It provides a tested approach to advancing credential innovation through stronger employer collaboration. Whether an institution is just beginning to explore employer partnerships or seeking to scale more mature efforts, the frameworks, personas, tools, and lessons in this guidebook are designed to support practical action.

At its core, this work reinforces a larger truth: the future of credential innovation depends on institutions' ability to **listen deeply, partner authentically, and respond nimbly to a changing workforce landscape**. UPCEA's initiative demonstrates that with the right structure, language, and support, institutions can build the capacity not only to engage employers more effectively, but also to shape a more connected, responsive, and opportunity-rich future for learners and the workforce alike.

# Building on Prior Work

## **Foundation: The UPCEA Hallmarks of Excellence in Credential Innovation**

This initiative is grounded in UPCEA's **Hallmarks of Excellence in Credential Innovation**, a comprehensive framework that defines eight pillars of effective microcredential strategy and practice. The Hallmarks provide institutions with a shared language and structure for advancing credentials that are high-quality, market-relevant, and sustainable. Building on this foundation, UPCEA developed the **Credential Maturity Index (CMI)**, which helps individuals assess their unit or institutional efforts around microcredential development for purposes of gauging relative strength, considering growth potential, assessing gaps, and supporting continual improvement.

This work builds on the **Building Capacity, Expanding Pathways: Accelerating the Growth of Credential Innovation** playbook UPCEA published in August 2024. The playbook summarizes national benchmarking research, shares examples from a consortium of ten colleges and universities, and provides lessons learned and promising practices.

This work focused specifically on Pillar 3: University-to-Business (U2B) Stakeholder Engagement, recognizing that strong employer partnerships are essential to ensuring credentials remain relevant, valued, and responsive to workforce needs.

Together, these tenets shaped both the design of this initiative and the resources that emerged from it.

**There is *no single model* for U2B Employer Engagement.**

Institutions approach partnerships in ways that reflect their mission, structure, and regional workforce needs. The examples in this report illustrate a range of strategies and practices, and are intended to be illustrative rather than prescriptive as institutions build and sustain employer engagement.

# Developing a Framework and Building a Community

Using a Human-Centered Design approach, a team of UPCEA members, selected from a competitive application pool, began to think about how to scale employer engagement practices and credential innovation.

## The Role of Peer Learning Leaders

A defining feature of this initiative was the **Peer Learning Leader (PLL) model**, which positioned experienced practitioners as both co-designers and facilitators.

Five Peer Learning Leaders and one Design Phase Contributor from UPCEA member institutions contributed expertise shaped by diverse institutional and employer contexts:

- ▶ **Alex Lowrie, Senior Director of Strategic Partnerships, University of California, Davis**—applying labor market intelligence and employer validation to define demand and outcomes
- ▶ **Annette Roberts Webb, Dean, Division of Professional and Continuing Education, University of California, Merced**—building foundational employer engagement processes and Extension capacity
- ▶ **Brandon Chavez, Associate Director, Industry Engagement & Partnership Development, University of California, San Diego**—employer discovery, early-stage partnership cultivation, and translating organizational needs into credential concepts
- ▶ **Jocelyn Widmer, Dean of Weapons Learning Transformation, Los Alamos National Laboratory**—employer-centered perspectives on workforce learning, ROI, and partnership expectations
- ▶ **Kristen Vanselow, Assistant Vice President for Innovative Education and Partnerships, Florida Gulf Coast University**—microcredential strategy, employer advisory engagement, and scalable credential pathways

## TOGETHER, THE PEER LEARNING LEADERS:

- ▶ Co-designed the U2B framework serving as a model for Employer Engagement
- ▶ Shared institutional exemplars that demonstrated varied pathways to U2B success
- ▶ Shaped practitioner personas grounded in real roles and constraints
- ▶ Co-created a pilot course and served as lead instructors
- ▶ Served as peer mentors providing multiple opportunities for engagement
- ▶ Their involvement ensured the work remained practitioner-driven, realistic, and adaptable.

## U2B Employer Engagement Personas

Putting practitioners in online and professional continuing higher education at the center of the process, the team identified three personas working to engage employers in building credentials.

### **THE PARTNERSHIP ARCHITECT (UNIVERSITY PARTNERSHIP LEADER)**

The Partnership Architect builds strategic, scalable employer relationships that connect workforce needs with institutional priorities and learner outcomes. They coordinate with academic leadership, faculty, and external partners to translate employer demand into stackable credentials and workforce-aligned programs while balancing financial sustainability and institutional impact. Common challenges include translating labor market data into program design, balancing customization with scalability, and sustaining partnerships amid shifting employer priorities and limited capacity.

### **THE WORKFORCE STRATEGIST (WORKFORCE AND COMMUNITY IMPACT LEADER)**

The Workforce Strategist aligns university workforce initiatives with regional economic needs, focusing on access and community talent development. They collaborate across academic units, workforce teams, and public-sector partners to align programs with employer demand and workforce priorities while navigating funding constraints and slower institutional timelines. Key challenges include breaking down silos, building institutional buy-in, and demonstrating long-term workforce impact.

### **THE MARKET-ALIGNED INNOVATOR (REVENUE AND PARTNERSHIP GROWTH LEADER)**

The Market-Aligned Innovator develops market-responsive, financially sustainable programs that address evolving employer needs while generating institutional revenue. Their work involves monitoring industry trends, engaging employer subject matter experts, and rapidly designing targeted learning solutions aligned with workforce demand and institutional capabilities. They often struggle to keep pace with changing skill needs, balance customized programs with scalable models, and demonstrate return on investment to employers and leadership.

## The U2B Design Framework

At the center of this work is the **U2B Design Framework**, a practical application of the Hallmarks of Excellence in Credential Innovation that integrates Human-Centered Design (HCD) principles with UPCEA's U2B tenets.

Rather than prescribing a linear process, the framework presents employer engagement as an iterative practice that institutions can enter at multiple points, depending on their context and capacity.

### FOUR CONNECTED PHASES

The U2B pillar emphasizes five core tenets that are aligned with Human-Centered Design phases:

Design Phase	U2B Tenets
Understand	Research + Validate employer/industry demand
Ideate	Identify Employers/Anchor Tenets
Prototype	Design Stackable Credential based on Employer Need
Iterate	Continuously Listen and Iterate as needs evolve

#### 1. UNDERSTAND (RESEARCH + VALIDATE)

Ground employer engagement in both data and discovery. Institutions combine labor market intelligence with structured employer conversations to clarify real needs before designing solutions.

#### 2. IDEATE (ANCHOR TENANTS)

Shift from broad outreach to focused collaboration by identifying anchor employers willing to co-design and pilot solutions.

#### 3. PROTOTYPE (DESIGN)

Develop and test short-form credentials—often microcredentials—that can function as stand-alone offerings or stack toward degrees.

#### 4. ITERATE (CONTINUOUSLY LISTEN)

Embed feedback loops, performance indicators, and ongoing employer dialogue to refine and sustain partnerships over time.

## GUIDING PRACTICES

# U2B DESIGN FRAMEWORK

A Practice of the UPCEA Hallmarks of Excellence in Credential Innovation

Applying the Lab's **HUMAN-CENTERED DESIGN** approach to UPCEA's **UNIVERSITY-TO-BUSINESS PRACTICES** to strengthen employer engagement ensures that employer partnerships are built on trust, collaboration, and a deep understanding of workforce needs, ultimately leading to better outcomes for learners and businesses alike.



## GUIDING QUESTIONS

# U2B DESIGN FRAMEWORK

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### UNDERSTAND

**1** **RESEARCH** the microcredentials that are acceptable to companies in a given region or industry.

**2** **VALIDATE** research findings about company demand for microcredentials.

- How can we reimagine our approach to U2B partnerships?
- What innovative solutions might address both college and employer needs?
- How can we leverage our existing strengths to overcome barriers?
- What assumptions might we need to challenge?



### IDEATE

Find **ANCHOR TENANTS** to buy the microcredentials in open-enrollment or customized delivery modalities (including on-site programs).

**3**

- What small-scale experiments could we run to test our ideas?
- How can we quickly create a model of our proposed solution?
- What feedback mechanisms can we build into our prototype?
- How might we iterate on our initial designs?



### PROTOTYPE

**4** **DESIGN** microcredentials as stand-alone educational products for companies' workforces but also as stepping stones to university degrees.

- What worked well in our prototype, and what didn't?
- How did stakeholders respond to our proposed solution?
- What unexpected insights did we gain from the process?
- How can we refine our approach based on what we've learned?



### ITERATE

**CONTINUOUSLY LISTEN** to companies about their microcredentials needs.

**5**

## Human-Centered Design Toolbox

To support institutions in applying Human-Centered Design, UPCEA, the PLL's, and our design phase partner, Education Design Lab, developed a Toolbox aligned with the intersection of HCD and U2B Employer Engagement. The toolbox is intentionally modular, allowing practitioners to select tools based on their immediate needs.

## Institutional Readiness Assessment: U2B Benchmarking

A key component of the pilot course was helping participants assess their current institutional readiness for employer-centered engagement and identify opportunities for growth. To support this process, the UPCEA team and Peer Learning Leaders developed a **U2B Readiness and Benchmarking approach** adapted from the Credential Maturity Index (CMI).

UPCEA's **Hallmarks of Excellence in Credential Innovation** identify eight pillars that define leadership in credential innovation across higher education. Building on this framework, the Credential Maturity Index was created to help institutions evaluate their progress in developing, implementing, and sustaining alternative credentials. The CMI enables institutions to identify strengths, surface gaps, and prioritize areas for improvement.

The survey served two purposes. First, it provided participants with an opportunity to reflect on their individual and institutional practices related to employer engagement. Second, it created a structured way to measure growth over time.

Participants completed the benchmarking survey prior to the start of the course and again upon completion. This **pre- and post-course benchmarking** allowed learners to compare their baseline practices with their evolving understanding of U2B engagement strategies.

The assessment examined readiness across five domains aligned with the U2B Tenets:

- ▶ **Strategic Alignment**, the degree to which employer engagement is integrated into institutional mission, leadership priorities, and program strategy

## TOOLKIT HIGHLIGHTS

- ▶ **UNDERSTAND TOOLS:** focused conversations, gallery walks, problem statement builders
- ▶ **IDEATE TOOLS:** design criteria, consensus workshops, practitioner personas
- ▶ **PROTOTYPE TOOLS:** journey maps, napkin pitches, service blueprints, storyboards

Members reported that these tools helped:

- ▶ Structure employer conversations
- ▶ Build shared internal language
- ▶ Reduce risk through small-scale testing
- ▶ Translate employer insight into actionable strategy

- ▶ **Research and Validate**, the use of labor market intelligence, employer research, and stakeholder insights to inform credential development
- ▶ **Employer Partnerships and Anchor Tenants**, the ability to build sustained relationships with employers who can shape and support credential initiatives
- ▶ **Build and Design**, the development of responsive programs or credentials aligned with employer and workforce needs
- ▶ **Listen and Iterate**, the presence of feedback loops and continuous improvement processes that allow institutions to adapt to changing workforce demands

The readiness assessment also served as a **learning tool rather than solely an evaluation instrument**. Participants used their results to identify where their institution currently stood within each domain and to focus their Journey Map development throughout the course.

Over the five weeks, benchmarking helped participants recognize how employer-centered strategies differ from traditional program development approaches. It also provided a structured framework for discussing institutional barriers, identifying opportunities for improvement, and documenting progress in adopting U2B practices.

Aggregate results showed **directional improvement across all five domains**, with the most significant gains in Research and Validate and Listen and Iterate. Participants reported increased confidence in conducting employer research, structuring conversations with industry partners, and incorporating employer feedback into credential design and iteration.

## Mentorship: Peer Connection

Mentorship was intentionally included in the U2B Credential Innovation initiative to support the program's peer learning leader model. The goal was to provide multiple opportunities for engagement and learning about credential innovation. The mentorship program provided maximum participant agency and allowed members to connect one-to-one and support peers who were actively implementing new initiatives at their institutions. This allowed participants to receive practical guidance, tested tools, and strategic insight from leaders who have addressed similar institutional challenges.

### KEY QUESTIONS MENTOR-MENTEES EXPLORE

Common themes from the pilot experience included:

- ▶ Building sustainable corporate and government partnerships to generate new funding and revenue streams, particularly within private universities
- ▶ Strategically aligning continuing education units when institutional priorities shift due to new leadership or evolving campus strategies
- ▶ Managing change at the senior leadership level, including influencing and working effectively with executive teams
- ▶ Launching and scaling new divisions or institution-wide initiatives, especially in non-credit and continuing education

These questions reflect participants' roles as institutional change agents navigating growth, ambiguity, and cross-campus coordination.

Conversation logs confirmed that the Pilot Mentorship Program delivered practical, strategy-oriented value. Participants used mentorship to navigate institutional complexity, leadership transitions, and revenue-focused growth. Mentors responded with actionable tools, templates, and experience-based guidance.

This alignment reinforces mentorship as a strategic leadership support mechanism for UPCEA members.

## Pilot Course U2B Employer Engagement

In addition to developing the U2B Design Framework and toolkit, UPCEA and the Peer Learning Leaders piloted a five-week online course focused on University-to-Business (U2B) Employer Engagement. The course translated the framework into practical guidance for practitioners building employer-centered credential strategies.

Designed by experienced U2B leaders, the course emphasized **applied learning, peer exchange, and immediate institutional relevance**. Rather than presenting a theoretical model, the course surfaced practical tools, processes, and strategies practitioners could adapt to their institutional contexts.

Each Peer Learning Leader contributed insights drawn from years of experience and facilitated one week of the course. This distributed authorship model exposed participants to multiple partnership approaches, institutional contexts, and implementation strategies.

### RELATIONSHIP TO UPCEA PROFESSIONAL DEVELOPMENT

UPCEA offers a range of professional development programs supporting practitioners working in credential innovation and continuing education.

One established course, **Credentials Beyond Degrees: The Role of Online and Professional Continuing Educators in Credential Innovation**, explores the lifecycle of microcredentials, including opportunity evaluation, design, implementation, and administration. The course examines all eight pillars of the **Hallmarks of Excellence in Credential Innovation**, providing foundational knowledge for practitioners entering or advancing in credential innovation work.

The U2B pilot course complements this offering by focusing deeply on one pillar, **University-to-Business Stakeholder Engagement**. Together, the courses provide complementary pathways, allowing practitioners to build both foundational knowledge and specialized expertise in employer engagement.

### COURSE STRUCTURE AND CONTENT

The course, **Credential Innovation: University-to-Business (U2B) Stakeholder Engagement**, was grounded in the U2B Stakeholder Engagement Tenets and informed by **Human-Centered Design principles**.

### LEARNER QUOTES

- ▶ As one learner noted, “The job aid document provided links to invaluable data sets. I loved having this all in one place.”
- ▶ “...I could see how to translate the learnings into my own work and thinking.”
- ▶ “I realized that we are currently going about this backwards. We design the microcredential and then hope employers will engage, instead of starting with their needs.”

Throughout the course, participants explored promising practices, shared institutional strategies, and applied course concepts to their own institutional contexts.

### **KEY LEARNINGS FROM THE PILOT COURSE**

Practitioners from diverse institutional contexts engaged with the U2B framework, applied new tools, and exchanged strategies over five weeks. Insights from evaluations, benchmarking surveys, and discussion forums highlight several themes.

#### *Practical tools support immediate application.*

Participants consistently identified concrete resources as the most valuable outputs, including journey maps, napkin pitch templates, labor market data walkthroughs, and curated resource collections.

#### *Exposure to different institutional models expands possibilities.*

The multi-instructor format highlighted partnership approaches across varied contexts, including examples of collaboration and anchor tenant strategies.

#### *Peer exchange strengthens learning.*

Live sessions and discussion forums were among the most valued elements, giving participants the opportunity to engage with peers facing similar institutional challenges.

#### *Benchmarking supports focused development.*

Pre- and post-course benchmarking showed improvement across all five U2B domains, with the largest gains in **Research and Validate** and **Listen and Iterate**.

#### *Participants shift toward employer-centered thinking.*

Discussion forums showed a progression from mapping existing practices to exploring employer communication, credential governance, and feedback systems.

# Resources and Next Steps

The practices, frameworks, and insights presented in this guidebook represent a starting point rather than a destination. Strengthening employer engagement and advancing credential innovation require ongoing learning, peer exchange, and access to evolving tools and research. The resources below support practitioners at every stage of this work, from those just beginning to explore University-to-Business strategies to experienced leaders seeking to refine and scale their approaches. Whether you are looking to get started, connect with peers facing similar challenges, or deepen your institution's capacity for employer-responsive design, these pathways offer concrete next steps.

- ▶ Find research, implementation tools, benchmarking resources, and thought leadership on **UPCEA's Credential Innovation Resources page**.
- ▶ Explore UPCEA's **online course catalog and register for Credential Innovation: University to Business (U2B) Stakeholder Engagement** and other credentials-related courses.

## *Selected Resources—complete resources found in the Library of UPCEA's Online Member Community, CORE*

- ▶ **U2B Design Framework:** A visual roadmap connecting human-centered design principles to UPCEA's five U2B Stakeholder Engagement Tenets, guiding practitioners through the phases of understanding, ideating, and prototyping employer partnerships.
- ▶ **U2B Benchmarking Survey:** Effective employer partnerships require alignment across leadership, strategy, infrastructure, and program development. An assessment to help institutions assess their readiness across five domains aligned with the U2B Tenets.
- ▶ **Hallmarks of Excellence in Credential Innovation:** UPCEA's comprehensive framework outlining eight pillars of excellent practice for institutions developing and delivering microcredentials.

- ▶ **Credential Maturity Index:** A diagnostic tool helping institutions assess their current state of credential innovation and identify priorities for advancement.
- ▶ **Playbook: Building Capacity, Expanding Pathways:** A practical guide developed through UPCEA's first Walmart-funded initiative, offering strategies for institutions seeking to strengthen their credential innovation infrastructure.
- ▶ **Research: Alternative Credentials: Business and Program Models:** An analysis of how institutions are structuring, pricing, and delivering microcredential programs across diverse contexts.



# A Call for Action

From its inception, this Walmart-funded initiative was designed to strengthen employer engagement and credential innovation practices across the field by generating practitioner-led insights, tools, and frameworks that others can adapt and apply. The challenges driving this work, including rapid shifts in employer expectations, emerging policy changes such as Workforce Pell, the integration of artificial intelligence, and growing demand for stackable pathways, cannot be addressed through isolated institutional responses. Strengthening University-to-Business engagement requires shared frameworks, common language, and cross-sector collaboration.

The lessons learned, deliverables, and tools developed through this initiative are intended to support these broader field-building efforts. The U2B framework, toolkit, and professional learning pathway offer UPCEA members a practical approach to employer engagement that is grounded in research, shaped by practitioners, and designed for adaptation across institutional contexts.

The next step is action. Institutions are encouraged to use these tools to examine their current employer engagement practices, pilot new approaches to collaboration with industry partners, and build internal alignment around shared frameworks and language. By intentionally investing in human-centered U2B practices, universities can move beyond transactional relationships with employers toward deeper partnerships that co-create credentials, respond to evolving workforce needs, and generate lasting value for learners, employers, and institutions alike.

The opportunity now is for institutions across the field to build on this foundation, test these practices in their own contexts, share what they learn, and continue advancing the collective work of strengthening university-to-business engagement.

# Acknowledgements

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We are especially grateful to the team of Peer Learning Leaders and pilot course participants whose guidance and feedback strengthened the development of this work. We also thank the many UPCEA members and partners who continue to advance innovation in credentials and workforce alignment.

## Insights for Application

Employer engagement works best when it is intentional, iterative, and grounded in employer needs, rather than driven by program priorities.

- ▶ **Human-centered design helps institutions listen before building.** Continuous listening sustains relevance as workforce needs change.
- ▶ **Employer-first mindsets matter.** Successful engagement begins with employer context, not existing programs.
- ▶ **Shared language accelerates alignment.** Frameworks help reduce confusion internally and externally. Shared frameworks reduce internal friction and accelerate action.
- ▶ **Small pilots build trust.** Prototyping lowers risk and demonstrates responsiveness.
- ▶ **Iteration sustains relevance.** Ongoing listening is essential as workforce needs shift.

**There is no singular path to effective employer engagement. The U2B Framework is a roadmap, not a rigid model.**



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This guidebook draws on primary sources, materials, feedback, and documentation generated throughout the Walmart-funded initiative, reflecting work conducted by UPCEA, the Peer Learning Leaders, UPCEA members in the pilot course and project partners. AI tools provided support in synthesizing and editing source materials. All content has been reviewed, refined, and approved by UPCEA staff and subject matter experts with direct involvement in the project. References and links have been verified for accuracy and reliability.

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