Edge.

Strategic Consortium Investment Model

Advancing Campus AI Capabilities

Executive Summary

In higher education, the acceleration of artificial intelligence (AI) is redefining how institutions deliver on their mission, shape academic inquiry, and steward operational excellence. For the first time, presidents, provosts, and CIOs face both an unparalleled opportunity and an urgent responsibility: to ensure that the adoption of AI technologies is guided by institutional values, supported by trustworthy data, and implemented through equitable, sustainable governance.

Participating institutions across the country are increasingly aware that AI is not a single project or platform—it is a paradigm shift. It touches every dimension of the institutional enterprise: teaching and learning, research, advising, admissions, financial operations, cybersecurity, and infrastructure. The question is no longer whether institutions will integrate AI, but whether they are prepared to do so responsibly, strategically, and at scale.

Edge's Artificial Intelligence Readiness (AIR) Framework was created to answer that question. AIR represents a comprehensive readiness and impact assessment that helps institutions evaluate current capabilities, identify high-value AI use cases, and develop a roadmap for intelligent transformation. Drawing upon proven frameworks such as TOGAF, CMMI, ITIL, and NIST, AIR combines executive-level advisory, technology diagnostics, and business process modeling into one cohesive engagement. The result is a practical blueprint for responsible AI adoption—grounded in data, aligned to mission, and designed for measurable institutional value.

Through this initiative, participating institutions will gain the ability to:

- **Evaluate Current Capabilities:** Understand their readiness across data, systems, workforce, and governance.
- **Align AI Use Cases with Strategic Goals:** Identify applications that advance student success, operational efficiency, and research innovation.
- **Develop Implementation Roadmaps:** Create actionable, budget-level plans for sustainable AI integration.
- **Establish Ethical and Governance Frameworks:** Adopt transparent, compliant, and equitable policies for AI use.
- **Build Institutional Capacity:** Strengthen leadership and staff competencies through guided training and continuous advisory.

The case for investment in AIR is clear: higher education cannot afford to approach AI through ad hoc pilots or fragmented initiatives. Without a structured readiness framework, institutions risk uneven implementation, data quality challenges, and uncoordinated policies that may undermine both efficiency and trust. By contrast, a shared readiness model offers economies of scale, common standards, and collective insight that individual campuses cannot achieve alone.

This proposal seeks to establish and expand the AIR Framework as a national model for institutional AI preparedness—one that funders, policymakers, and education consortia can support to accelerate the responsible adoption of AI across the postsecondary sector. The investment requested will enable participating institutions to conduct readiness assessments, develop implementation plans, and execute targeted pilots that demonstrate measurable impact in academic and operational domains.

Each participating institution will emerge from the AIR engagement with a detailed AI Readiness Scorecard, a three-year strategic roadmap, and a governance model aligned with national standards. Collectively, these deliverables will position higher education leaders to make informed, ethical, and data-driven decisions about AI integration—ensuring that innovation serves mission, not the other way around.

The value proposition is therefore both systemic and sustainable: through strategic investment in readiness today, participating institutions will shape the responsible, data-governed, and mission-aligned use of AI for the next generation of learners and scholars. This engagement ensures every AI investment is explicitly connected to the institutional value chain through the Business Value Story framework, providing clear visibility into expected educational, operational, and financial outcomes.

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Table of Contents

Project Overview:
The AIR Framework and Purpose

Artificial Intelligence Readiness (AIR) is more than an assessment—it is a strategic enablement program designed to help higher education institutions transition confidently from experimentation to transformation. The AIR Framework equips participating institutions with the structure, data, and leadership alignment necessary to harness AI technologies responsibly and effectively across all mission-critical domains: academic, administrative, and research.

The purpose of the AIR initiative is to ensure that AI integration in higher education is not reactionary but strategic—anchored in sound governance, ethical principles, and institutional mission. While AI promises remarkable gains in efficiency, personalization, and innovation, its successful adoption requires the same rigor that institutions apply to accreditation, compliance, and fiscal stewardship. The AIR Framework brings that rigor to AI.

A Multi-Framework Approach

AIR integrates multiple globally recognized frameworks—TOGAF, CMMI, ITSM/ITIL, and NIST—to deliver a unified, enterprise-level readiness model. Each framework contributes a vital dimension to institutional transformation:

- **TOGAF** (The Open Group Architecture Framework): Aligns technology initiatives with institutional strategy, ensuring AI solutions directly advance the academic mission and business objectives.
- **CMMI** (Capability Maturity Model Integration): Evaluates organizational maturity and identifies capacity-building needs for sustained AI performance.
- **ITSM/ITIL** (IT Service Management Framework): Ensures that operational processes are service-oriented, measurable, and designed for continuous improvement.
- **NIST** (National Institute of Standards and Technology): Provides the cybersecurity, data privacy, and governance controls required for ethical and trustworthy AI deployment.
- **BVS** (Business Value Story™/Business Value Alignment): Ensures that institutional AI readiness activities are explicitly connected to measurable value categories—such as successful strategy, satisfied customers (learners), optimal capacity, revenue growth, and financial stability. The BVS model maps each AI initiative to the key business drivers and investment areas required to realize tangible outcomes, ensuring we quantify the "why" before defining the "how."

By integrating these frameworks into one methodology, AIR offers a holistic approach that transcends siloed technology assessments. It addresses readiness at every level—data, systems, people, process, and policy—producing a blueprint that is both technical and human-centered.

Foundational Data Principles: The Five V's and HTAP

Central to AIR's methodology are two foundational principles of data excellence: the Five V's of Big Data—Volume, Velocity, Variety, Veracity, and Value—and Hybrid Transactional/Analytical Processing (HTAP). These elements ensure that AI is grounded in data ecosystems that are comprehensive, trustworthy, and capable of real-time insight generation.

- **Volume:** Capturing and managing vast datasets across academic, research, and operational systems.
- **Velocity:** Enabling near-real-time data processing for timely decision-making and intervention.
- **Variety:** Integrating structured and unstructured data from diverse institutional sources.
- **Veracity:** Ensuring data accuracy, governance, and ethical stewardship.
- **Value:** Translating data into actionable intelligence that supports institutional outcomes.

HTAP capabilities unite live operational data and historical analytics, allowing institutions to assess what is happening now and why—closing the gap between insight and action. Together, the Five V's and HTAP form the backbone of AI readiness, ensuring that every recommendation, model, or automation initiative is built upon reliable, mission-relevant data.

Strategic Intent

The AIR Framework has three overarching purposes:

1. **Readiness Assessment:** Determine the institution's current capabilities, risks, and opportunities related to AI adoption.
2. **Strategic Alignment:** Link AI initiatives directly to the institution's mission, values, and strategic priorities.
3. **Roadmap Development:** Deliver a multi-year, actionable plan that prioritizes high-value AI use cases and identifies the enabling infrastructure, policies, and workforce competencies required to support them.

Through this structured approach, participating institutions move from isolated experimentation to institution-wide orchestration—where AI becomes not just a collection of tools, but a sustainable framework for digital transformation and academic excellence.

Purpose and Vision

The purpose of this initiative is to build national capacity for responsible AI in higher education by equipping institutions with a shared methodology for readiness, governance, and implementation. The vision is that every participating institution, regardless of size or mission, will possess the confidence and capability to leverage AI ethically and effectively in service of learning, discovery, and operational efficiency.

By investing in AI readiness today, participating institutions and their funding partners are investing in the integrity and resilience of higher education tomorrow. The AIR Framework ensures that the promise of AI is realized not as a disruptive force, but as a deliberate evolution—one that strengthens the institution's ability to educate, innovate, and serve in a rapidly changing world.

Goals and Objectives:

The Artificial Intelligence Readiness (AIR) initiative is structured around a unified vision: to enable participating institutions to adopt, govern, and sustain AI in ways that advance their academic mission, operational efficiency, and long-term resilience. This vision is translated into specific, measurable goals and objectives that collectively strengthen institutional readiness and sector-wide capacity for responsible AI integration.

Primary Goal: Institutional and Systemic AI Readiness

The overarching goal of AIR is to build institutional ecosystems that are prepared—technically, organizationally, and ethically—to integrate and scale AI solutions across mission-critical functions. Readiness in this context is not limited to the acquisition of new technologies; it encompasses governance, culture, skills, data quality, and continuous improvement.

By aligning people, processes, and platforms, AIR ensures that each participating institution can move from isolated innovation to enterprise transformation. The outcome is a network of institutions that operate from a position of preparedness rather than reaction, positioning them to lead in the emerging AI landscape of higher education.

Strategic Objectives

Each participating institution undertaking the AIR engagement will pursue the following objectives:

OBJECTIVE 1:

Evaluate Institutional Readiness Across Core Domains

Conduct a structured diagnostic assessment using the AIR framework and E360 methodology to measure maturity across ten enterprise IT and operational domains. This assessment also identifies which Business Value Categories and institutional drivers are most impacted by AI readiness gaps, allowing leadership to prioritize investments that directly advance strategic business outcomes.

- Assess existing data infrastructure, governance, cybersecurity, and workforce skills.
- Identify strengths, weaknesses, and gaps relative to AI adoption and digital transformation readiness.
- Establish an AI Readiness Baseline Scorecard that quantifies institutional capability and risk posture.

OBJECTIVE 2:

Align AI Use Cases with Institutional Mission and Strategy

Identify and prioritize AI use cases that directly support the institution's academic, administrative, and research goals.

- Ensure that each use case is mapped to measurable outcomes—student success, operational efficiency, equity, and innovation.
- Develop an AI Use Case Catalog, scoring opportunities based on feasibility, ROI, and mission alignment.
- Eliminate technology-driven projects that lack strategic justification or governance oversight.
- Each prioritized use case will be mapped to discrete and measurable business drivers and results the use case will generate —such as growth opportunities, attracting new learners, scalability and reliability, market messaging impact—to ensure clear line-of-sight between AI adoption and mission-critical value outcomes.

OBJECTIVE 3:

Develop a Three-Year Institutional AI Roadmap

Design and deliver a comprehensive, phased roadmap that provides clear guidance for implementation and sustainability.

- Outline short-, mid-, and long-term priorities across infrastructure, policy, and workforce development.
- The roadmap will also integrate an AI strategic business value matrix that will clearly identify which capabilities, systems, or processes must be developed to unlock institutional value and measurable benefit.
- Provide budget-level projections and timelines for pilot initiatives and infrastructure modernization.
- Integrate governance checkpoints to ensure compliance, equity, and ongoing institutional oversight.

OBJECTIVE 4:

Establish Governance and Ethical Frameworks for AI Adoption

Ensure that AI integration adheres to national and institutional standards for privacy, equity, and transparency.

- Apply NIST and ITIL frameworks to define policies for risk management, data stewardship, and lifecycle governance.
- Formalize institutional policies that address generative AI, algorithmic accountability, and ethical decision-making.
- Build executive-level awareness and faculty development programs around responsible AI practices.

OBJECTIVE 5:

Strengthen Institutional Capacity and Workforce Competency

Develop leadership, technical, and operational capacity to sustain AI-driven initiatives beyond initial funding.

- Train administrators, faculty, and IT professionals in AI literacy, governance, and data ethics.
- Provide executive coaching and vCIO advisory to institutional leaders responsible for digital transformation.
- Establish communities of practice across participating institutions to share lessons learned and best practices.

OBJECTIVE 6:

Foster a Data-Driven Culture of Continuous Improvement

Encourage decision-making grounded in accurate, real-time, and contextually meaningful data. Progress will be evaluated using BVS outcome indicators, ensuring institutional leaders can quantify improvements in satisfaction, efficiency, capacity development, and financial resilience.

- Leverage the Five V's and HTAP principles to improve institutional agility and data quality.
- Embed continuous evaluation and feedback loops into all AI-driven processes.
- Use AIR's diagnostic tools to measure progress year over year and recalibrate strategy accordingly.

Long-Term Impact Objectives

Beyond immediate readiness outcomes, the AIR initiative is designed to produce long-term sector-wide benefits that extend across the higher education ecosystem:

1. **Shared Framework for Responsible AI:** Establish a repeatable, evidence-based model for readiness that can be scaled across multiple institutions and states.
2. **Enhanced Data Governance and Interoperability:** Improve institutional capacity to integrate and safeguard data in alignment with federal and state privacy regulations.
3. **Workforce Development and Economic Competitiveness:** Enable colleges and universities to equip students and staff with the skills needed for an AI-mediated economy.
4. **Collaborative Policy Innovation:** Create informed institutional and consortium-level policies that align with emerging national standards and ethical guidelines.
5. **Sustainable Digital Transformation:** Transition AI adoption from isolated initiatives to systemic change supported by continuous improvement cycles and executive leadership engagement.

Consortium Model and Stakeholders Roles

The Artificial Intelligence Readiness (AIR) initiative is designed to operate through a collaborative consortium model that maximizes efficiency, equity, and shared learning among participating institutions. This model leverages Edge's deep expertise in executive technology strategy and its history of facilitating sector-wide transformation initiatives, creating a structure in which each institution benefits from individualized analysis while contributing to a collective understanding of AI readiness across the higher education landscape.

At its core, the consortium model is built on the principle of shared value creation. Participating institutions maintain autonomy in their internal decisions, policies, and priorities, while also benefiting from coordinated assessments, data benchmarking, and access to collective insights. This approach allows for both institutional customization and system-level synthesis—providing a unified framework for funders, policymakers, and education leaders seeking scalable, evidence-based approaches to responsible AI integration.

Consortium Structure

The AIR consortium operates as a cohort-based initiative, typically encompassing five to eight participating institutions within a shared state, system, or regional network. Each cohort is supported by Edge's Executive Advisory Division and guided by a structured governance and communication framework to ensure coordination, accountability, and knowledge exchange.

Key Structural Features

- **Shared Assessment Framework**: All participating institutions complete the AIR diagnostic process using the same assessment instruments, ensuring comparability of results and enabling sector-wide benchmarking.
- **Individual Institutional Engagements:** Each institution receives a customized engagement that includes its own AIR Readiness Scorecard, strategic roadmap, and tailored recommendations reflecting unique mission, culture, and capacity.
- **Cohort-Level Synthesis Report:** Edge compiles the aggregated findings across all participating institutions to produce a Consortium Cohort Report, identifying shared challenges, trends, and opportunities for collaboration and policy development.
- **Governance and Advisory Oversight:** A cross-institutional steering group composed of representatives from each participating institution and Edge's executive advisors ensures transparent communication, project alignment, and decision-making throughout the engagement.
- **Economies of Scale:** The consortium model reduces per-institution cost and accelerates progress through shared facilitation, joint learning sessions, and streamlined data collection.

Roles and Responsibilities

The success of the AIR initiative relies on clear delineation of responsibilities among the key stakeholders: **participating institutions, Edge, executive leadership teams, and advisory partners.**

Participating Institutions

Each participating institution serves as both a beneficiary and a contributor to the consortium's collective success. Institutional leadership commits to:

- Designating an **executive sponsor** (typically the president, provost, or CIO) to champion the initiative internally.
- Providing access to relevant data, policies, and personnel necessary for the AIR assessment.
- Engaging key stakeholders across academic, research, and administrative units in interviews, surveys, and focus sessions.
- Reviewing and validating findings to ensure institutional context and accuracy.
- Integrating AIR recommendations into strategic planning, budgeting, and digital transformation efforts.

Edge (Executive Advisory and Facilitation Partner)

Edge serves as the principal architect and implementation partner for the AIR engagement. Its Executive Advisory Division provides the strategy, frameworks, and facilitation to ensure consistent quality and measurable outcomes across the consortium. Key responsibilities include:

- Designing and administering the AIR diagnostic across participating institutions.
- Delivering executive-level advisory through Edge's vCIO (Virtual Chief Information Officer) program.
- Conducting Business Process Modeling (BPM) to identify AI automation and integration opportunities.
- Providing cybersecurity maturity and governance analysis through the vCISO (Virtual Chief Information Security Officer) service.
- Facilitating the development of three-year institutional and consortium-level AI roadmaps.
- Producing both institutional and cohort-level reports that summarize findings, readiness indicators, and implementation priorities.

Institutional Leadership and Governance Teams

At each institution, a governance structure supports the AIR engagement through dedicated working groups:

- **Executive Leadership Group:** Provides strategic direction, ensures alignment with mission, and approves final recommendations.
- **Data and Technology Readiness Team:** Supports data collection, systems mapping, and assessment of infrastructure, cybersecurity, and HTAP capabilities.
- **Academic and Research Integration Group:** Identifies AI applications within curriculum design, faculty development, and research computing environments.
- **Finance and Operations Group**: Evaluates resource implications, cost optimization, and return on investment associated with AI readiness initiatives.

These teams serve as both informants and implementers, ensuring that the AIR process remains connected to institutional realities while achieving enterprise-level outcomes.

Funding Partners and Policy Stakeholders

Philanthropic organizations, government agencies, and state systems serve as strategic enablers of the AIR initiative. Their role is not only financial but also catalytic—helping scale the readiness framework and ensuring alignment with statewide and national policy priorities. Funders benefit from:

- Access to aggregated, anonymized findings that inform policy design and investment strategies.
- Insight into the maturity and progress of institutions across the sector.
- Confidence that funded initiatives are guided by a tested, ethical, and data-driven methodology for responsible AI adoption.

Collaborative Benefits

The consortium model delivers a series of mutual benefits that extend beyond any single institution:

- **Shared Intelligence:** Institutions gain insight into peer benchmarks and emerging best practices, promoting cross-sector learning and innovation.
- **Policy Influence:** Aggregated findings inform system-level and state-level policy, guiding broader digital transformation strategies.
- **Resource Efficiency:** Shared costs and coordinated facilitation make high-quality advisory services accessible to a wider range of institutions.
- **Sustained Engagement:** The AIR model establishes an enduring network of practice—enabling ongoing collaboration, capability sharing, and co-investment in future initiatives.

A Blueprint for Collaboration

Through this consortium-based structure, AIR transforms the readiness journey from an isolated institutional exercise into a collective advancement strategy for higher education. Each participating institution emerges stronger individually, and together they define a shared blueprint for the responsible and strategic integration of artificial intelligence across the postsecondary landscape.

Implementation Plan (Years 1–3)

The Artificial Intelligence Readiness (AIR) initiative is executed through a structured, three-year implementation plan designed to move participating institutions from baseline assessment to measurable transformation. Each phase builds upon the last—establishing readiness, advancing capability, and embedding AI as a sustained enabler of institutional excellence.

The plan's architecture balances two priorities: (1) the need for immediate, actionable insights that inform decision-making in the first year, and (2) the longer-term objective of institutionalizing responsible AI practices, governance, and data-driven culture across the higher education enterprise.

Overview of the Three-Year Framework

The AIR consortium operates as a cohort-based initiative, typically encompassing five to eight participating institutions within a shared state, system, or regional network. Each cohort is supported by Edge's Executive Advisory Division and guided by a structured governance and communication framework to ensure coordination, accountability, and knowledge exchange.

	PHASE	PRIMARY FOCUS	KEY DELIVERABLES
YEAR 1	**Assessment and Strategic Alignment**	Establish baseline readiness, identify institutional priorities, and design tailored AI roadmaps.	AIR Readiness Scorecard, E360 Diagnostic, AI Use Case Catalog, Initial Governance Framework
YEAR 2	**Pilot Implementation and Capability Development**	Launch targeted pilot initiatives, strengthen governance, and expand institutional AI literacy.	Pilot Results Report, Faculty and Staff Development Plans, Governance Maturity Review, Data Excellence Optimization Plan
YEAR 3	**Sustainability, Scale, and Impact Measurement**	Institutionalize successful practices, scale effective AI applications, and measure systemic outcomes.	Consortium Cohort Impact Report, Continuous Improvement Framework, Long-Term Sustainability Strategy

Year 1: Assessment and Strategic Alignment

The first year establishes the foundation for all subsequent activity. It centers on discovery, evaluation, and alignment with institutional mission and capacity.

Key Activities:

- **E360 Technology Diagnostic:** Conduct a comprehensive analysis across ten enterprise domains, including infrastructure, governance, data management, cybersecurity, and academic readiness.
- **AI Readiness Assessment:** Evaluate organizational maturity using the AIR diagnostic, incorporating the Five V's of Big Data and HTAP readiness to ensure real-time data integrity and analytical capability.
- **Stakeholder Engagement:** Facilitate structured interviews, workshops, and surveys with leadership, faculty, and operational teams to understand perceptions, priorities, and pain points.
- **AI Use Case Catalog:** Identify and prioritize high-impact AI applications aligned with institutional mission (e.g., student success analytics, resource optimization, or academic advising).
- **Governance and Ethical Framework Development:** Draft initial AI policy and governance structures using NIST and ITIL models to support ethical and compliant deployment.
- **Business Value Story Mapping:** Conduct an initial mapping exercise that aligns institutional AI priorities with the appropriate business value categories (successful strategy, satisfied learners/customers, optimal capacity, revenue growth, cost optimization, and financial stability). This establishes a shared understanding of value early in the process.

Year 1 Deliverables:

- AIR Readiness Scorecard and institutional baseline rating.
- Strategic AI roadmap outlining top use cases and priorities.
- Initial governance and ethical AI policy framework.
- Summary of institutional readiness findings and recommended next steps.
- Initial Business Value Alignment Matrix linking readiness findings to institutional value categories.

By the conclusion of Year 1, each participating institution will possess a detailed understanding of its current-state capabilities, readiness gaps, and actionable priorities for AI adoption and governance.

Year 2: Pilot Implementation and Capability Development

The second year translates strategy into action. Institutions use their individualized AI roadmaps to launch pilot projects, refine governance mechanisms, and begin embedding AI literacy across the workforce.

Key Activities:

- **Pilot Project Implementation:** Execute 1–3 pilot initiatives drawn from the Year 1 AI Use Case Catalog. These may include predictive analytics for student success, intelligent automation for administrative processes, or generative AI models for operational efficiency.
- **BPM and Workflow Redesign:** Conduct Business Process Modeling (BPM) exercises to document current workflows and design future-state processes integrating AI capabilities.
- **Governance Maturity Review:** Reassess and strengthen governance frameworks, ensuring consistent oversight of ethics, privacy, and data stewardship.
- **Professional Development and AI Literacy:** Deliver faculty and staff training programs that enhance understanding of AI fundamentals, data-driven decision-making, and responsible use.
- **Data Excellence Optimization:** Advance the Five V's framework through data cleansing, integration, and quality improvement projects to support scalable AI operations.
- **Value Driver Validation:** Using early pilot results, validate which business drivers (e.g., growth opportunities, impactful market messaging, innovation & R&D, operational efficiency) are being activated and where capacity gaps remain.
- **Investment Area Prioritization:** Identify which BVS investment areas—such as new offerings, attracting new learners, commercializing research, or aligned market messaging—must be strengthened for scaling successful pilots.

Year 2 Deliverables:

- Pilot Implementation Report summarizing outcomes, lessons learned, and ROI.
- Updated Governance and Data Management Frameworks reflecting improved maturity.
- AI Literacy and Professional Development Plan with participation metrics.
- Cross-institutional knowledge-sharing workshops for the consortium cohort.
- Business Value Impact Report linking pilot outcomes to BVS value categories and institutional business drivers.

By the end of Year 2, participating institutions will have demonstrated tangible results through pilot projects, developed skilled personnel capable of managing AI-driven initiatives, and refined their governance to meet evolving ethical and compliance standards.

Year 3: Sustainability, Scale, and Impact Measurement

The third year of the AIR engagement focuses on ensuring continuity, scaling proven solutions, and capturing the cumulative value created across all participating institutions. This phase solidifies AI readiness as a core institutional capability rather than a temporary initiative.

Key Activities:

- **Evaluation and Impact Analysis:** Assess institutional progress against baseline metrics established in Year 1, using both quantitative and qualitative measures.
- **Sustainability and Governance Integration:** Embed AI governance structures into institutional policy, budget processes, and strategic planning cycles to ensure long-term alignment.
- **Scaling of Proven Solutions:** Replicate and expand successful pilot projects across additional departments, campuses, or systems, supported by lessons learned during the pilot phase.
- **Consortium Cohort Impact Report:** Produce a synthesized analysis of readiness gains, shared outcomes, and best practices across all participating institutions.
- **Continuous Improvement Framework:** Introduce mechanisms for ongoing evaluation, peer review, and iterative enhancement of AI-related processes.
- **Enterprise Value Realization Review:** Assess how scaled AI initiatives contribute to institutional business value outcomes such as learner satisfaction, operational efficiency, revenue opportunities, and financial resilience.
- **BVS Outcome Integration:** Embed BVS metrics into the institution's ongoing transformation and continuous-improvement practices.

Year 3 Deliverables:

- Consortium Cohort Impact Report summarizing collective findings and sectoral insights.
- Institutional Sustainability Strategy outlining governance and funding mechanisms for long-term AI integration.
- Continuous Improvement Framework and tools for ongoing measurement.
- Presentation of outcomes to funding partners, state leaders, and higher education associations.
- Business Value Outcome Dashboard measuring multi-year ROI aligned to BVS categories and business outcomes.

By the conclusion of Year 3, the AIR initiative will have established a repeatable model of success—one that positions participating institutions as leaders in responsible AI adoption, provides funders with measurable impact evidence, and creates a foundation for continued cross-sector collaboration and scaling.

Cohort Learning and Knowledge Transfer

Throughout all three years, Edge facilitates ongoing knowledge-sharing sessions, enabling participating institutions to exchange best practices, discuss challenges, and build a national network of AI-enabled leaders. These structured touchpoints ensure that AIR functions not only as an institutional engagement, but as a collaborative movement advancing responsible AI readiness across higher education.

Outcome of Implementation

The three-year plan delivers a clear and repeatable pathway from readiness to realization:

- **Year 1:** Understand and align.
- **Year 2:** Act and evaluate.
- **Year 3:** Institutionalize and expand.

Through this deliberate progression, AIR transforms the uncertainty surrounding AI adoption into a structured journey toward institutional excellence, ethical governance, and sustainable innovation.

Evaluation and Outcomes Framework

Effective evaluation is the cornerstone of the AIR initiative. From its inception, AIR was designed to integrate both quantitative and qualitative evaluation mechanisms to measure readiness, impact, and institutional growth over time. The Evaluation and Outcomes Framework ensures that participating institutions, funders, and stakeholders can trace a clear line of sight from investment to outcome, from readiness to realized transformation.

This framework provides a transparent and evidence-based method for assessing progress, guiding continuous improvement, and validating the long-term value of AI readiness across the postsecondary sector.

Evaluation Philosophy

The AIR evaluation model is grounded in three guiding principles: **accountability, adaptability, and alignment.**

1. **Accountability** ensures that every deliverable and outcome can be objectively measured and validated through transparent indicators.
2. **Adaptability** acknowledges that institutions vary in size, mission, and capacity, allowing for customized evaluation pathways while maintaining consistency across the consortium.
3. **Alignment** guarantees that all metrics directly reinforce institutional mission, funder priorities, and the ethical adoption of AI.

This philosophy moves beyond traditional performance reporting. It provides a living framework that informs decision-making, enables benchmarking, and supports strategic planning at both institutional and consortium levels.

Evaluation Design

AIR employs a mixed-methods evaluation design—combining quantitative metrics from its diagnostic tools with qualitative data derived from interviews, workshops, and governance documentation. This design allows evaluators to capture both measurable performance gains and the cultural, behavioral, and strategic shifts that accompany successful AI adoption.

Core Evaluation Components:

1. **Baseline Assessment:**
   - The AIR Readiness Scorecard, generated in Year 1, establishes a quantifiable baseline across ten enterprise domains: Strategy, Governance, Infrastructure, Cybersecurity, Data Management, Academic Readiness, Workforce, Finance, Operations, and Service Management.
   - Each domain is rated using a 1–5 maturity scale (Emerging to Optimized), producing a composite AI Readiness Index for each institution.
2. **Formative Evaluation:**
   - Conducted continuously during Years 1 and 2 to monitor implementation fidelity, pilot performance, and stakeholder engagement.
   - Edge's vCIO advisors use structured progress reviews to track completion of milestones, assess emerging risks, and adjust strategies as needed.
3. **Summative Evaluation:**
   - Conducted in Year 3 to measure the cumulative impact of the AIR engagement.
   - Integrates institutional scorecard improvements, pilot project outcomes, governance maturity ratings, and stakeholder satisfaction.
   - Captures both quantitative progress (e.g., data quality improvements, adoption rates, ROI) and qualitative impact (e.g., cultural readiness, leadership alignment, faculty engagement).
4. **Consortium-Level Synthesis:**
   - Aggregates and anonymizes results across participating institutions to produce sector-wide benchmarks and insights.
   - Identifies cross-institutional trends in governance, ethics, and operational transformation, offering funders and policymakers a panoramic view of AI readiness progress in higher education.

Key Performance Indicators (KPIs)

The following KPIs serve as measurable indicators of success at both institutional and consortium levels. They are organized within the five critical readiness dimensions of the AIR framework. Evaluation will incorporate Business Value Story metrics, ensuring progress is measured not only by capability maturity but by realized business outcomes tied to learner satisfaction, institutional capacity, and financial stability.

DIMENSION	KEY PERFORMANCE INDICATORS (EXAMPLES)
Data & Infrastructure Readiness	Percentage of data systems integrated for HTAP; reduction in data redundancy; increase in real-time data availability; data quality and veracity index.
Governance & Compliance	Existence of formal AI policy; governance framework maturity rating (based on NIST and ITIL benchmarks); risk mitigation and incident response metrics; compliance with FERPA/GDPR-equivalent standards.
Operational Efficiency & ROI	Measured reduction in manual workflows through AI automation; time savings and cost optimization realized through BPM-led redesign; budget adherence and reinvestment rate in digital initiatives.
Academic & Research Innovation	Number of AI-enabled academic programs or research initiatives launched; faculty participation in AI literacy programs; documented improvements in learning analytics and research efficiency.
Institutional Capacity & Culture	AI literacy increase among faculty/staff; leadership confidence rating from post-engagement surveys; integration of AI strategies into institutional planning documents; ongoing participation in consortium activities.

These KPIs provide both funders and institutional leaders with a clear, evidence-based understanding of how AI readiness translates into tangible progress and measurable value.

Data Collection and Reporting Mechanisms

To ensure accuracy, consistency, and transparency, AIR incorporates a robust data collection and reporting system:

- **Centralized Data Repository:** Edge maintains a secure, cloud-based platform for collecting readiness assessments, pilot data, and outcome metrics across all participating institutions.
- **Quarterly Progress Dashboards:** Each institution receives a dynamic dashboard tracking progress across its AI Readiness domains, enabling leadership to visualize growth trajectories in real time.
- **Annual Consortium Reports:** Synthesized findings are shared annually, offering aggregate insights into sector-level advancement, policy implications, and areas requiring additional support.
- **Independent Review Option:** For funders or large-scale implementations, independent third-party evaluation partners can validate findings to enhance objectivity and external credibility.

Impact Evaluation and Longitudinal Tracking

Beyond the three-year engagement, the AIR model establishes mechanisms for longitudinal tracking, allowing institutions and funders to measure the enduring effects of AI readiness investments. Key long-term metrics include:

- Sustained improvement in AI Readiness Index scores beyond initial funding cycles.
- Continued operation and refinement of institutional AI governance structures.
- Expansion of AI-related academic offerings and research output.
- Institutional reinvestment in digital transformation initiatives resulting from measurable ROI.
- Ongoing collaboration among institutions within the consortium network.

This longitudinal approach ensures that the impact of AIR is not confined to the grant period but endures as a catalyst for systemic innovation and accountability.

Evaluation Roles and Responsibilities

- **Edge (Executive Advisory Division):** Oversees evaluation design, data collection, and progress analysis; produces institutional and consortium-level reports.
- **Participating Institutions:** Provide access to relevant data, participate in surveys and interviews, and verify institutional progress reports.
- **Funding Partners:** Review outcomes for accountability, policy insight, and potential scaling opportunities; receive regular progress briefs and an end-of-engagement impact summary.
- **External Evaluators (optional):** Conduct independent audits or validation of outcomes for funders seeking third-party verification of project impact.

Feedback Loops and Continuous Improvement

Evaluation within AIR is not a retrospective exercise—it is a dynamic process of refinement. Each cycle of data collection informs immediate course correction and longer-term strategic planning. Participating institutions use their readiness metrics not only as a reflection of progress but as an instrument for continued growth.

Through these built-in feedback loops, AIR fosters a culture of continuous improvement where lessons learned from pilot projects and governance reviews directly shape future strategy. This ensures that each iteration of the AIR engagement delivers compounding returns in efficiency, trust, and institutional intelligence.

Outcome Assurance

At the conclusion of the three-year cycle, the AIR initiative will provide funders and leadership stakeholders with comprehensive, evidence-based documentation demonstrating:

Quantifiable improvements in institutional readiness, data governance, and operational efficiency.

- Ethical and policy frameworks that ensure responsible AI use.
- Replicable methodologies that can be scaled regionally or nationally.
- A clear return on investment in the form of cost savings, risk reduction, and enhanced institutional capacity.

By embedding evaluation into every stage of implementation, AIR transforms accountability into insight, and insight into action—ensuring that every dollar invested contributes directly to the advancement of responsible, mission-aligned AI across higher education.

Sustainability and Scalability

True transformation in higher education is not defined by the initiation of innovation but by its continuity. The sustainability of the Artificial Intelligence Readiness (AIR) initiative depends on embedding readiness practices, governance structures, and data-driven decision-making processes into the operational DNA of participating institutions. Equally critical is scalability—ensuring that the frameworks, methodologies, and insights gained through the AIR engagement can be replicated and extended to additional institutions, systems, and consortia across the country.

Together, these two imperatives—sustainability and scalability—ensure that the AIR initiative delivers enduring value, producing measurable outcomes long after the initial funding period concludes.

Sustainability Strategy

The AIR sustainability strategy focuses on establishing institutional ownership of AI readiness capabilities and continuity of governance and professional development after the conclusion of the three-year engagement. The goal is to empower participating institutions to continue evolving their AI ecosystems independently, guided by structures and habits cultivated during the project.

1. Institutionalization of AI Governance

- Integrate AI governance and ethical policies developed through the AIR initiative into formal institutional policy frameworks, ensuring continued oversight through standing committees or task forces.
- Embed AI governance structures into annual strategic planning, accreditation, and compliance cycles, ensuring alignment with evolving federal and state regulations.
- Maintain regular updates to risk assessments, data governance models, and AI use case catalogs to reflect new technologies and institutional priorities.

2. Integration with Strategic and Budget Planning

- Incorporate AI roadmap priorities into institutional capital planning and budget processes, transitioning from external funding dependence to internal investment.
- Establish recurring funding mechanisms (e.g., technology innovation funds, academic transformation reserves) to support ongoing AI pilot projects and infrastructure enhancements.
- Use realized operational efficiencies and ROI from early AI initiatives to reinvest in long-term digital transformation goals.

3. Continuous Professional Development and Capacity Building

- Sustain ongoing faculty and staff AI literacy programs initiated during the engagement, supported by online learning modules, workshops, and peer mentoring.
- Maintain access to the AIR knowledge base, governance templates, and benchmarking tools to support continuous learning and refinement.
- Establish institutional "AI Champions" across academic and administrative units to maintain momentum and share evolving best practices.

4. Data-Driven Culture of Continuous Improvement

- Continue utilizing the AIR Readiness Scorecard annually as a self-assessment and performance management tool.
- Leverage data from institutional systems and dashboards to inform policy updates, risk management strategies, and investment decisions.
- Reinforce the Five V's and HTAP principles in all enterprise data initiatives to ensure continued integrity and value of institutional analytics.

Scalability Strategy

Scalability within the AIR framework is both horizontal (expanding across institutions) and vertical (deepening within each institution). The model's modular design allows for replication and adaptation across diverse institutional types—large research universities, private liberal arts colleges, community colleges, and specialized institutions—without sacrificing fidelity to the core methodology.

1. Horizontal Scalability — Expanding Across Institutions

- **Consortium Cohort Replication:** The AIR model supports multiple cohorts of participating institutions, each benefiting from shared templates, diagnostic tools, and facilitation processes developed in earlier rounds.
- **Regional and Statewide Expansion:** State systems or regional higher education associations can adopt AIR as a standardized AI readiness framework, enabling coordinated policy development and statewide benchmarking.
- **Cross-Sector Collaboration:** The AIR methodology can be adapted to collaborations between higher education institutions and research hospitals, nonprofit partners, or workforce development agencies—ensuring interoperability and consistent governance standards.
- **Knowledge Transfer Infrastructure:** Edge will maintain a repository of anonymized best practices, data maturity models, and implementation case studies to guide new participants and accelerate onboarding.

2. Vertical Scalability — Deepening Institutional Impact

- **Scaling Successful Pilots:** Expand effective AI applications identified in Year 2 pilots across multiple departments, campuses, or academic disciplines.
- **Embedding Governance into Enterprise Systems:** Integrate AI governance workflows into institutional ERP, LMS, and data analytics platforms for seamless compliance monitoring and audit capability.
- **Building Institutional Research Capacity:** Encourage faculty-led research on AI ethics, pedagogy, and digital transformation using AIR-generated data and frameworks.
- **Extending Evaluation Frameworks:** Maintain ongoing measurement of institutional maturity through longitudinal evaluation, allowing for scaling beyond the initial cohort.

Collaborative Sustainability Through the Consortium Model

The consortium approach inherently reinforces sustainability. By pooling expertise, sharing results, and disseminating best practices, participating institutions reduce redundancy, enhance capacity, and create a self-sustaining ecosystem of innovation.

Key consortium-level sustainability mechanisms include:

- **Annual AIR Leadership Summit:** A gathering of institutional executives, CIOs, faculty leaders, and policymakers to share findings, emerging use cases, and governance updates.
- **Peer-to-Peer Mentorship Network:** A structured mentoring model pairing institutions at different maturity levels, allowing early adopters to guide new entrants in the AIR process.
- **Shared Advisory and Governance Council:** A standing body of representatives from participating institutions to maintain continuity of oversight, guide framework evolution, and pursue future funding opportunities collaboratively.
- **Ongoing Research and Grant Collaboration:** Institutions within the consortium can co-author research proposals, policy papers, and subsequent funding applications leveraging AIR evaluation data as a foundational evidence base.

Long-Term Vision

The ultimate vision for sustainability and scalability extends beyond any single grant cycle or cohort. Over time, AIR is intended to become a national framework for AI readiness—a trusted model that guides institutions, funders, and policymakers in aligning innovation with integrity.

By enabling each participating institution to progress from readiness to leadership, AIR builds an ecosystem where higher education collectively shapes the responsible and strategic use of AI. It ensures that the lessons learned from one cohort become the stepping stones for the next, multiplying impact and deepening sector-wide transformation.

The result is a self-reinforcing cycle: assessment informs strategy, strategy drives implementation, implementation yields data, and data sustains improvement. This virtuous cycle guarantees that the readiness established through AIR becomes a permanent institutional

BVS provides the long-term measurement structure for quantifying institutional and consortium-level value, ensuring continued alignment between AI adoption and mission-critical outcomes.

Budget Narrative and Funding Alignment

The budget for the Artificial Intelligence Readiness (AIR) initiative is designed to balance fiscal prudence with transformational impact. Each cost component directly supports measurable outcomes, ensuring that every investment advances the capacity of participating institutions to integrate, govern, and sustain artificial intelligence responsibly.

The financial model emphasizes transparency, scalability, and alignment with funder priorities—creating a framework where resources are efficiently distributed, duplication is minimized, and value is maximized through shared infrastructure, expert facilitation, and cross-institutional learning.

Investment Philosophy

The AIR initiative treats each dollar invested as a multiplier—producing immediate diagnostic value, mid-term capability development, and long-term institutional transformation. The financial design is anchored in three guiding principles:

1. **Shared Value Creation:** Costs are distributed across participating institutions through a consortium model, reducing per-institution expense while maintaining individualized advisory quality.
2. **Direct Outcome Alignment:** Each budget element maps to specific deliverables—diagnostics, governance frameworks, training, or implementation pilots—ensuring that funds translate directly into results.
3. **Sustainability Beyond the Grant Period:** Early investments build internal capacity and governance structures that reduce long-term dependency on external funding.

Budget Structure Overview

The AIR initiative's financial structure follows a three-tier model encompassing: (1) consortium-level coordination, (2) institutional-level assessments and implementation, and (3) evaluation and reporting.

CATEGORY	PURPOSE	EXAMPLE ACTIVITIES/ DELIVERABLES	TYPICAL FUNDING SOURCES
Consortium Coordination & Management	Supports shared infrastructure, facilitation, and administration.	Project management, data repository, annual leadership summits, cohort facilitation.	Grant administration funds, philanthropy, state consortia contributions.
Institutional Assessment & Implementation	Funds AIR assessments, roadmap development, pilot projects, and governance design at each participating institution.	E360 diagnostic, vCIO and vCISO advisory, Business Process Modeling, AI literacy training, policy development.	U.S. Department of Education (FIPSE or discretionary), NSF AI & Workforce programs, Spencer Foundation.
Evaluation & Reporting	Enables comprehensive measurement of outcomes and dissemination of findings.	Evaluation framework design, readiness scorecard, longitudinal data collection, consortium impact report.	Federal evaluation funding, foundation research support, state policy grants.

Illustrative Budget Breakdown (Per Institution Basis)

While final budgets vary by scope, institutional size, and consortium structure, the following example illustrates the proportional allocation for a typical three-year AIR engagement:

CATEGORY	ESTIMATED % OF TOTAL COST	DESCRIPTION
Diagnostic and Assessment (E360 + AIR Readiness Scorecard)	**20%**	Comprehensive analysis across 10 enterprise domains; readiness benchmarking; data and HTAP mapping.
Executive Advisory and Governance (vCIO/vCISO)	**15%**	Strategic leadership alignment, cybersecurity, governance, and policy development.
Business Process Modeling (BPM) & Workflow Redesign	**10%**	Process mapping and automation integration to identify efficiency gains and pilot readiness.
Pilot Projects & Implementation Support	**25%**	Development and testing of AI applications with evaluation and scalability planning.
Professional Development and AI Literacy	**10%**	Faculty/staff training, workshops, leadership coaching, and online learning resources.
Evaluation and Reporting	**10%**	Readiness scorecard updates, KPI tracking, and annual consortium reports.
Consortium Coordination and Data Infrastructure	**10%**	Centralized data repository, project management, shared tools, and cohort facilitation.

Cost Efficiency through the Consortium Model

Through the consortium structure, AIR achieves economies of scale that significantly reduce per-institution cost while maintaining depth and rigor. For example:

- Shared advisory resources (vCIO and vCISO hours) are distributed across institutions rather than replicated independently.
- Common data collection instruments and analytics reduce evaluation overhead.
- Consortium-level workshops replace multiple, redundant on-site sessions.
- A shared impact report provides funders with unified evidence of ROI across all participating institutions.

This model aligns perfectly with the priorities of state agencies, foundations, and federal programs seeking scalable, replicable impact across multiple institutions.

Funding Alignment with Federal and Philanthropic Priorities

The AIR initiative aligns with multiple active funding opportunities across federal, state, and private sources. Its design makes it flexible enough to satisfy varied program criteria while maintaining consistent methodology.

1. **U.S. Department of Education (ED) – Postsecondary Readiness and Innovation Grants**
   - FIPSE (Fund for the Improvement of Postsecondary Education): Supports innovation in teaching, learning, and institutional capacity building. AIR's focus on data governance, readiness, and professional development aligns directly with FIPSE's objectives.
   - Secretary's Supplemental Priority on Advancing Artificial Intelligence in Education: AIR qualifies under this priority as a comprehensive readiness, assessment, and governance initiative that enables responsible AI integration at scale.
2. **National Science Foundation (NSF) – AI in Education and Workforce Programs**
   - AIR serves as the readiness and infrastructure foundation for NSF-funded projects advancing AI adoption, ethical frameworks, and workforce preparedness.
   - The consortium approach aligns with NSF's preference for collaborative, multi-institutional proposals and capacity-building across campuses.
3. **Spencer Foundation – AI and Education Initiative**
   - AIR provides a research-validated structure for examining institutional readiness, equity, and ethical policy development, meeting Spencer's emphasis on actionable research and implementation.
4. **State and Regional Innovation Funds**
   - State-level programs focused on digital transformation, higher education innovation, or workforce development can use AIR as a prequalified framework for readiness and implementation funding.
   - Participating institutions can partner with state agencies to embed AIR outcomes into long-term policy frameworks and education reform strategies.

Matching and In-Kind Contributions

To demonstrate institutional commitment and enhance competitiveness for federal or philanthropic grants, participating institutions are encouraged to provide:

- In-kind contributions such as staff participation time, facility use, or internal data system support.
- Matching funds directed toward pilot implementation, faculty development, or technology modernization.
- Joint cost-sharing through consortia membership fees or reinvestment of efficiency savings identified during the AIR engagement.

These contributions signal sustainable engagement and align with funder expectations for institutional buy-in.

Return on Investment (ROI) and Economic Justification

The AIR model delivers quantifiable economic value in both cost savings and opportunity gains:

- **Operational Efficiency:** Streamlined workflows and automation reduce redundancy and administrative burden.
- **Data-Driven Decision-Making:** Improved data quality and accessibility enhance institutional agility, reducing risk and supporting compliance.
- **Shared Resources:** Consortium-based collaboration minimizes duplication of tools and expertise across institutions.
- **Workforce Development:** Faculty and staff training programs reduce the need for external consulting, fostering long-term self-sufficiency.
- **Sustainable Governance:** Well-defined governance frameworks prevent the costs of reactive policy-making or compliance failures.

Funders and policymakers can expect a clear and documented return on investment—both in the measurable outputs of the three-year engagement and in the enduring readiness capacity that persists long after the project's conclusion.

Financial Stewardship and Accountability

All funds allocated under the AIR initiative will be managed with strict adherence to federal Uniform Guidance (2 CFR Part 200) and institutional grant management protocols. Edge's Executive Advisory Division provides detailed financial tracking and transparent reporting for both direct and consortium-level expenditures.

Quarterly financial statements, progress summaries, and cumulative expenditure reports will ensure that funders have a clear, ongoing view of how resources are deployed and what outcomes are achieved.

Conclusion

The AIR budget narrative and funding alignment reflect a disciplined, outcomes-oriented approach to investment. By emphasizing shared value, sustainability, and evidence-based impact, AIR transforms funding from a short-term expense into a long-term institutional asset.

The result is a high-leverage initiative that not only advances responsible AI adoption but also models fiscal integrity, collaboration, and transparency—hallmarks of the participating institutions' commitment to innovation for the public good.

Closing Statement

The AIR initiative is not a theoretical exercise but a proven, implementable roadmap for responsible AI integration across higher education. Supported by Edge's deep institutional partnerships, the E360 foundation, and data-driven principles of HTAP and the Five V's, AIR provides funders and leaders with a scalable, sustainable model for intelligent transformation.

Through shared frameworks, rigorous evaluation, and a commitment to ethical innovation, the AIR initiative ensures that participating institutions are prepared not just for the emergence of AI technologies but for the future of education itself—a future defined by trustworthy data, human-centered governance, and collaborative excellence.

Accelerate AI Readiness on Your Campus

Participate in AIR

Edge is preparing a submission for the current "Advancing AI in Education" FIPSIE grant funding opportunity from the US Department of Education on behalf of our consortium.

Interested institutional leaders are encouraged to connect with Edge to learn more about our project submission and formalize your interest in collaborating in a grant-funded AIR Assessment via a no-commitment Letter of Intent. If you're interested in participating, reach out to Michelle Ferraro and Erin Brink, Edge's Member Engagement Team.

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Appendices and Supporting Statements

The appendices provide the structural and conceptual backbone of the AIR initiative, documenting Edge's institutional capabilities, the evolution of the E360 model, and the foundational technical concepts—such as HTAP and the Five V's—that inform the AIR methodology. Together, these supporting statements demonstrate that the AIR framework is not theoretical; it is a mature, field-tested, and standards-aligned model ready for national deployment across higher education.

Appendix A: Edge Institutional Capabilities

Edge is a nonprofit technology consortium serving more than 50 member institutions across 25 states. Its mission is to enable digital transformation, innovation, and research acceleration in higher education through advanced networking, cybersecurity, cloud infrastructure, and executive advisory services. Edge's Executive Advisory Division delivers strategic consulting through programs such as EdgePro, EdgeCloud, EdgeSecure, and E360, forming the foundation for AIR.

Key Areas of Expertise

- **Strategic Technology Leadership:** Edge's vCIO (Virtual Chief Information Officer) service provides executive-level guidance in IT governance, digital transformation, and technology alignment with institutional mission.
- **Cybersecurity and Governance:** Through the vCISO (Virtual Chief Information Security Officer) program, Edge assists institutions in adopting NIST-aligned cybersecurity frameworks, conducting risk assessments, and developing compliance roadmaps.
- **Enterprise Architecture and Process Optimization:** Edge applies TOGAF and CMMI principles to help institutions map enterprise systems, integrate data environments, and modernize business processes for efficiency and resilience.
- **AI Readiness and Data Strategy:** Edge's leadership in data governance, analytics integration, and AI ethics enables it to serve as both advisor and implementation partner in the responsible adoption of emerging technologies.

Edge's credibility rests not only on its technical expertise but also on its collaborative ethos. As a member-owned organization, Edge brings neutrality, transparency, and a mission-driven focus that ensures recommendations are always aligned with the public good and the academic values of its members.

Appendix B: Evolution of the E360 Framework

The **E360 Technology Assessment** framework was originally conceived as a comprehensive diagnostic for enterprise information systems architecture and digital transformation readiness. Over time, E360 evolved into a modular methodology integrating ten core domains that mirror the full spectrum of IT and organizational maturity within higher education.

These domains include:

1. IT Strategy and Planning
2. Governance and Policy
3. Funding and Financial Management
4. Enterprise Architecture
5. Data and Data Governance
6. IT Service Management (ITSM)
7. Organizational Capacity and Workforce Development
8. Educational Technologies and Online Learning Infrastructure
9. Cybersecurity and Risk Management
10. Business Architecture and Process Optimization

The E360 model forms the analytical foundation of AIR, providing the structure for readiness assessments, maturity scoring, and roadmap development. AIR extends this model into the AI era by incorporating:

- AI-specific readiness indicators, such as governance, ethics, and algorithmic transparency.
- Evaluation of data ecosystems for HTAP (Hybrid Transactional/Analytical Processing) capability.
- Integration of the Five V's of Big Data (Volume, Velocity, Variety, Veracity, Value) as the diagnostic lens for data excellence.
- Cross-mapping to global standards—TOGAF, CMMI, ITIL, and NIST—to ensure methodological consistency and compliance.

The transition from E360 to AIR represents a deliberate evolution from digital transformation readiness to intelligent transformation readiness — a new frontier where institutions must not only manage technology but also understand and govern it in the context of AI-driven decision-making.

Appendix C: Technical Foundation — HTAP and the Five V's of Data Excellence

Hybrid Transactional/Analytical Processing (HTAP)

HTAP is a next-generation data architecture that enables real-time integration of transactional and analytical workloads within a unified environment. In traditional higher education systems, transactional databases handle day-to-day operations (registrations, financial aid, HR), while analytical systems process historical data for reporting or forecasting. This separation creates latency, inefficiency, and decision delays.

HTAP eliminates that divide by allowing simultaneous access to live and historical data streams. For participating institutions, this means:

- Immediate insight into operational trends—student retention, course enrollment, research utilization, and financial performance.
- Accelerated feedback loops that enable predictive interventions and adaptive resource allocation.
- A single source of truth that enhances data veracity, governance, and compliance across institutional systems.

In AIR, HTAP is not merely a technical recommendation; it is a strategic enabler. It allows AI models to operate on trusted, up-to-date data while preserving security and performance standards aligned with NIST and FERPA guidelines.

The Five V's of Big Data in Higher Education

The Five V's — Volume, Velocity, Variety, Veracity, and Value — are the core pillars of AIR's data readiness assessment.

- **Volume:** Institutions manage ever-expanding datasets from learning management systems, research repositories, IoT devices, and administrative applications. AIR ensures scalable architectures to manage growth effectively.
- **Velocity:** Decision-making depends on the ability to process data in near real-time. AIR evaluates data flow performance and latency across platforms.
- **Variety:** Information exists in multiple forms—structured, semi-structured, and unstructured. AIR assesses integration maturity across these data types to support holistic analytics.
- **Veracity:** Data integrity and trust are paramount. AIR evaluates governance controls, audit mechanisms, and data lineage practices to safeguard accuracy and ethics.
- **Value:** The ultimate goal is institutional impact. AIR measures how data translates into actionable insights that drive mission outcomes—academic excellence, operational efficiency, and research advancement.

When combined, the Five V's and HTAP provide the conceptual and technical foundation for reliable, scalable, and ethically grounded AI. They ensure that participating institutions not only collect data but understand, trust, and use it effectively to power AI-enabled transformation.

Appendix D: Sample Deliverables and Artifacts

To demonstrate methodological transparency and readiness for implementation, AIR provides funders and institutions with standardized artifacts including:

1. **AIR Readiness Scorecard** – A quantitative matrix evaluating maturity across ten enterprise domains, mapped to AI readiness dimensions.
2. **Three-Year Strategic Roadmap** – Actionable milestones, cost estimates, and governance checkpoints.
3. **Institutional AI Use Case Catalog** – Prioritized applications of AI aligned with mission and ROI analysis.
4. **Governance and Ethics Policy Template** – Pre-formatted policy structure adaptable to institutional frameworks.
5. **Consortium Cohort Impact Report** – Aggregated findings highlighting sector-wide maturity, trends, and policy implications.

These artifacts provide evidence of progress, compliance, and accountability, offering funders a clear picture of deliverables produced through AIR engagements.

Appendix E: Edge Commitment to Ethical AI

Edge maintains a formal commitment to the ethical use of artificial intelligence in education, aligning with the U.S. Department of Education's guidance on AI innovation and privacy, and the National Institute of Standards and Technology AI Risk Management Framework (AI RMF 1.0).

Edge's ethical principles include:

- **Transparency:** AI applications and recommendations must be explainable and auditable.
- **Equity:** AI adoption must support equitable access and outcomes for all learners.
- **Accountability:** Institutions retain human oversight and decision authority in all AI-supported processes.
- **Privacy:** Data use adheres to strict compliance with FERPA, HIPAA (where applicable), and GDPR-equivalent standards.
- **Sustainability:** AI solutions should enhance—not replace—human judgment, promoting long-term institutional and societal well-being.

This ethical posture underscores Edge's role as a trusted partner to institutions and funders seeking to advance innovation responsibly.

Appendix F: References and Supporting Frameworks

The AIR methodology draws upon globally recognized frameworks and research, including:

- The Open Group Architecture Framework (TOGAF 9.2)
- Capability Maturity Model Integration (CMMI v3.0)
- IT Infrastructure Library (ITIL v4)
- National Institute of Standards and Technology (NIST 800-53 and AI RMF 1.0)
- ISO 9001 Quality Management Systems Standards
- U.S. Department of Education's "Guidance on the Use of Artificial Intelligence in Education" (2025)
- OECD Principles on Artificial Intelligence (2019)
- EDUCAUSE and Internet2 resources on Data Governance and AI Readiness

These frameworks collectively assure funders and institutions that AIR's approach is evidence-based, internationally benchmarked, and compliant with the highest standards of data and risk management.