

APPENDIX A:

METHODOLOGY

This report employs a qualitative research design grounded in a yearlong series of structured group convenings with HBCU leaders and their partners, supplemented by in-depth case studies of five institutions and cross-case thematic synthesis. The animating question is: What if HBCUs were treated as a national investment priority?

This research question is twofold: How are HBCU leaders and their partners operationalizing aspects of the 2022 call to action, and what do their efforts reveal about the policy and capital reforms needed to scale this work? A case study design was selected because these questions concern a contemporary phenomenon in its real-world context, where institutional strategy is informed by surrounding policy and capital environments. Case study methodology allows for such questions because it permits the examination of how institutions operate within and are constrained by the systems around them, rather than isolating institutional performance from context.

Our research design proceeded in three phases: 1) structured group convenings to surface field-level perspectives and generate candidate propositions; 2) in-depth case development at five institutions selected to garner institutional variation; and 3) cross-case synthesis.

Case study institutions were selected through purposeful selection to capture the diversity of the HBCU field across four dimensions: governance (public and private); land-grant status (1890 land-grant and non-land-grant); geography (urban, small town, and rural, as well as Mid-Atlantic, Deep South, and Delta regions); and enrollment (approximately 1,000 to 11,600 students). The five case institutions were Wiley University (private, rural East Texas); Morgan State University (public

doctoral research, urban Baltimore); Tuskegee University in partnership with East Chop Capital (private land-grant, rural Alabama Black Belt); Coppin State University (public, urban campus), and the University of Arkansas at Pine Bluff (public 1890 land-grant, Arkansas Delta). The University of Arkansas at Pine Bluff was included as an outlying case; it is an early national model whose subsequent stagnation permits examination of the conditions under which HBCU-anchored development is and is not sustained.

Case institutions self-selected into on-the-record participation.

PARTICIPANTS

Across all data collection activities, the study engaged senior leaders from 12 HBCUs spanning public, private, land-grant, urban, and rural institutional categories, alongside participants from five additional organizations, including mission-driven developers, community development financial institutions (CDFIs), philanthropic funders, and national policy intermediaries.

Participant roles included HBCU presidents and senior cabinet leaders; campus real estate, finance, and advancement executives; philanthropic leaders and mission-aligned funders; community investment intermediaries and CDFI partners; community and economic development practitioners; policy thinkers and national intermediaries; and mission-driven developers with active HBCU project experience.

DATA COLLECTION

Data were collected between May 2025 and April 2026 through five complementary instruments:

- **Structured convenings:** Four convenings brought together HBCU leaders and cross-sector stakeholders. Each convening followed a semi-structured facilitation protocol built around open-ended questions addressing three domains: 1) the current state of campus and community development projects; 2) the constraints and opportunities institutions encounter in advancing them; and 3) the system-level changes that would permit HBCU-led work to move from concept to scale. Facilitators used open-ended prompts and follow-up probes rather than fixed-response items, allowing participants to introduce constructs the research team had not anticipated. Sessions were designed to pressure-test assumptions external stakeholders held and create a learning environment unconstrained by familiar political or philanthropic framings.
- **Site visit:** A two-day site visit to Wiley University in Marshall, Texas combined campus and neighborhood observation with working sessions involving institutional leadership and community partners, permitting direct observation of the physical assets, neighborhood conditions, and institution-community relationships described in convening testimony.
- **Structured case study intake:** Each case study institution completed a standardized written intake instrument documenting project scope, development stage, capital structure, partnerships, anticipated impact, and resource needs. The instrument used a common template across institutions to permit cross-case comparison.
- **Supplementary individual consultations:** Individual conversations with institutional leaders and cross-sector practitioners were used to clarify, extend, and verify material surfaced in group settings.
- **Audience-response survey:** A panel session at the UNCF Unite Summit in July 2025 used a live, anonymous audience-response survey to capture reflections from seven additional HBCU leaders on the same themes explored in the convenings, providing a check on whether convening perspectives extended beyond the convened group.

ATTRIBUTION AND CONSENT PROTOCOL

On-the-record convening segments were recorded with participant consent, and quotations from those segments are attributed by name. Off-the-record sessions were conducted under a non-attribution convention to elicit candor.

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