From demographics and social change to politics and technology, many trends impact planning in higher education. SCUP’s *Trends for Higher Education* is designed to help you and your institution make sense of the most significant evolutionary forces.

This edition focuses primarily on forces of change from outside academe that may force further evolution in colleges and universities. We look through an array of different lenses to gain some perspective on issues and opportunities that appear to be on the horizon—or at our doors.

**About Trends**

Demographic shifts. Political changes. Social movements. The evolution of technology. These all affect your institution. SCUP’s *Trends for Higher Education* helps you and your institution stay on top of the major changes in the world around you. How?

» We scan a wide range of sources and identify significant trends and movements outside of higher education.

» We help you anticipate how these trends might affect your institution.

**How can you use Trends?**

» Inform your environmental scanning or SWOT analysis

» Support strategic planning efforts

» Discuss the future of higher education

» Serve as evidence to support your budget requests

» Assist in program prioritization

» Help develop new curricula

We’ve organized *Trends* using STEEP:

**Social:** How people work internally (psychology) and with each other (sociology)

**Technology:** How people use technology (including hardware and software), how society relies on technology, and how technology affects society

**Economic:** Macro- or microeconomics, including global trends, anything related to jobs and skills needed for jobs, and industry shifts

**Environmental:** Our external surroundings, including sustainability and our evolving workplaces, cities, and living spaces

**Political:** Public policy, governmental systems, the people within them, and the effects of government decisions on our citizens and communities

Each trend includes a brief trend summary, a footnoted source, and discussion questions to help you analyze and act on the trend.

**Join the Conversation**

It’s impossible for us to identify every issue you may need to consider. What did we miss? What did we get wrong? Tell us!

» E-mail trends@scup.org

» Tweet @Plan4HigherEd with the hashtag #scuptrends
Social Trends

How can higher education hire more women, engage younger staff, and educate Black and Latino students? How might AI affect human thinking? Can universities be better innovators?

Higher Ed’s Glass Ceiling

A recent survey by CUPA-HR finds that universities are hiring more women—but not necessarily for the C level. While about half of all administrators in higher education are women, male presidents and chief business officers still outnumber them more than 2:1. Among chief information officers and chief athletic directors, the ratio is 4:1. Another gap: Female administrators in higher ed in 2016 earned about 80 cents to every dollar earned by men on campus.

For discussion
As more institutions move more deeply into their explorations and applications of artificial intelligence, expect more people to raise philosophical questions about the ultimate impact of AI on human beings. What is your institution’s stance on AI? Does your institution need an AI policy? How might your institution respond to potential pushback about AI?

Is AI a Friend or a Foe?

Deep thinkers like Stephen Hawking worry that artificial intelligence (AI) may one day threaten mankind’s very existence. As the pace of AI development speeds up, cognitive scientists suggest that more attention needs to focus on the ways in which machine intelligence and human intelligence complement each other. Arguing for “intelligence augmentation,” one recent article suggests that the ultimate goal for AI ought to be “not building machines that think like humans, but designing machines that help humans think better.”

For discussion
The inequalities for women in higher education mirror those in society at large. What specific steps could your institution take to bring better gender equity to campus staffing and salaries? How can higher ed become a paragon of workplace equity?

How to Lead When You’re Not the Top Gun

Harry Kraemer, a clinical professor of strategy at the Kellogg School of Management at Northwestern University, offers a road map for becoming one of the “go to” people who drive action and progress in an organization. You don’t need a huge staff, he says, just “lead from where you are.” Raise issues but also offer solutions. Learn everything you can about your institution. Build a cross-campus network of contacts. And nurture leadership in others.

For discussion
As increasingly complex institutions, universities need strong leaders at all levels of the organizational chart. To raise your own visibility and influence on campus, how might you adapt some of Professor Kraemer’s ideas? How can you inspire staff to engage more deeply in their work? To use one of Kraemer’s metaphors, how can you nudge your staff to move from “watching the movie” to “being in the movie”?

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The Holy Grail for Workplace Efficiency

With half a million employees at 40,000 sites worldwide—including many colleges and universities—Sodexo knows a thing or two about the workplace. In analyzing workplace trends for 2017, the company sees more organizations seeking “the holy grail of agility—speed plus stability.” Other trends include the impact of workplace robotics, a need for intergenerational learning, and a rise in collaborative workspaces and co-working.¹

For discussion

Assuming that Sodexo’s trends apply in university workplaces—and not just in dorms or dining halls—how might insights from this list help you improve the workplace at your own institution? To cite another trend on the list, how might you “leverage the power of employees’ personal brands” for the good of the institution—are there ways to meld an employee’s interests with those of the institution?

Deeper dive

Sodexo says another trend is using design thinking to redefine the workplace experience. The company explains: “From physical space and technology to virtual work considerations and amenities, the way workers experience their surroundings is key to a happy workforce. Design thinking can help optimize this experience so that it supports employees both within and outside of the workplace.” How might design thinking enrich the workplace at your institution?⁸

Educational Attainment Is Up, but the United States Still Lags

The U.S. Census Bureau recently released data reporting that just over a third (33.4 percent) of adults in the United States have earned a bachelor’s degree or higher. That’s the best performance on record; when the government began tracking educational attainment in 1940, just 4.6 percent of Americans had a four-year degree or higher.⁶ Still, the Organisation for Economic Co-operation and Development (OCED) reports that the United States still lags some 10 other prominent nations by the same measure. Of 25- to 34-year-olds, for example, 69 percent of South Koreans have a higher education degree or credential, compared to 46.5 percent of Americans.⁷

For discussion

Overall, the United States is making progress in degree completion, but with two-thirds of adults yet to earn a bachelor’s degree, more remains to be done. What specific steps is your institution taking to help students complete their degrees? Can your institution use the international attainment gap to make a case about the need for more public support of higher education and research?

Innovation: Start Small, Then Scale

To brainstorm about the future of higher education and pilot ideas that will “help make higher education more affordable and more accessible to more people,” Southern New Hampshire University (SNHU) created the Sandbox Collaborative. A space for “experimentation, failure, daring, ideation, and iteration,” the collaborative serves as both an internal consultancy that supports SNHU’s strategic initiatives and an incubator that works with external partners to find solutions to pressing problems in higher education.⁸

For discussion

As an industry, higher education has been better known for inertia than for innovation. But today’s rapidly evolving landscape demands that institutions act more nimbly and creatively. A “skunk works” like the Sandbox Collaborative is one solution, but even if your institution is not ready to make that kind of commitment, what can it do to pilot substantive changes? From new ways of doing business to new strategies for student success, how can your institution nurture small-scale innovation and experimentation?

Deeper dive

Daniel Christian, a senior instructional designer at Calvin College, says the rudder of a large ship has a smaller rudder called a “trim tab.” Applying that concept to higher education, he suggests colleges and universities create “trim tab groups”: small, nimble units that can innovate and experiment, then pass promising findings up through the organization for wider adoption.⁹
Helping Black and Latino Students Succeed

Demographic trends suggest that colleges are enrolling more Black and Latino students. The Hechinger Report recently summarized strategies to help those students succeed, including opportunities for group work and strong academic support and counseling. Deeper change is also needed, including “changing the mindset of faculty so that they have high expectations of success for Black and Latino students.” Also vital: making success for Black and Latino students a campus-wide priority.¹⁰

For discussion
Is your institution serving today’s students with yesterday’s strategies for success? As the demographics of the student body evolve—including more Black, Latino, and minority students—strategies to help students succeed may also need to evolve. How can your institution review this challenge institution-wide, engage the right stakeholders, and find better ways to meet the needs of Black, Latino, and minority students?

Performance Reviews That Actually Matter

Acknowledging that its performance reviews were flawed, Human Resources at Pennsylvania State University decided to make performance management more engaging, consistent, and fair. Penn State made a series of changes emphasizing employee development and career pathing, including linking individual goals with university and departmental strategic plans, simplifying performance ratings, and linking ratings to merit pay.¹¹

For discussion
It’s probably fair to say that nobody likes performance reviews. But given that they are necessary, how can performance management work more smoothly and be more constructive? Could your institution take a page from Penn State’s new playbook for performance reviews? What steps could your institution take to ensure that personnel reviews serve the interests of both staff members and their supervisors—and help advance the institution’s strategic goals?

SOCIAL TREND SOURCES

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Missy Kline, CUPA-HR, Higher Ed Workplace Blog

2 Cognitive Collaboration: Why Humans and Computers Think Better Together
Jim Guszcza, Harvey Lewis, and Peter Evans-Greenwood, Deloitte University Press

3 Don’t Wait to Be Asked: Lead
KejlogginInsight
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4 The 2017 Global Workplace Trends Report
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5 Ibid

6 Highest Educational Levels Reached by Adults in the U.S. Since 1940
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7 Population with Tertiary Education
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8 Sandbox Collaborative
Southern New Hampshire University
http://www.sandboxcollaborative.org/

9 The Need For More “Trim Tab Groups” in Higher Education
Daniel Christian, EvoLLLution
https://evollution.com/managing-institution/operations/efficiency/the-need-for-more-trim-tab-groups-in-higher-education/

10 Five Things American Colleges Need to Do to Help Black and Latino Students
Nick Chiles, Hechinger Report
http://hechingerreport.org/five-things-american-colleges-need-help-black-latino-students/

11 Why and How One University Hit the Reset Button on Performance Management
Missy Kline, CUPA-HR, Higher Ed Workplace Blog
FOOD FOR THOUGHT

Higher Education in the (Near) Future: Four Scenarios

Insightful futurist Bryan Alexander recently speculated on what higher education might look like in 2025. Writing for the NACUBO magazine Business Officer, Alexander frames four possible scenarios. One option, he says, is that contracted student enrollment due to demographic trends could lead to “less thickly populated campuses, if not fewer institutions” and fewer faculty. One upside, he suggests, is that institutions will try to recruit more international students and “campuses could become much more cosmopolitan.”

In a second scenario, Alexander envisions health care as “the leading engine of the American economy,” with universities restructuring both undergraduate and graduate programs to train more health care workers. Related disciplines, like STEM, and classes with medical tie-ins, such as health care finance and medical ethics, would also grow.

Under Alexander’s third concept, advances in automation lead to “software capable of mimicking some functions currently performed by humans, such as competent tutoring.” If this comes to pass, he says, “financially pressed institutions might outsource some of their curriculum to apps, instead of hiring teaching staff,” and “cyborg” instructors might become the norm.

In Alexander’s fourth scenario, higher education stays essentially on the same trajectory it is on today. That might lead, he says, to more bifurcation between have and have-not institutions and to the privatization of more state universities as legislative appropriations continue to decline. Institutions would serve more students in their 30s, more international students, and more senior citizens. Most faculty would be adjuncts.

For discussion

Like any good futurist, Alexander’s vision gives good food for thought about higher education in 2025 and beyond. How would each of these scenarios affect your institution? How could your institution respond? Is your institution engaged in conversations like this now? If not, how could such a discussion get started?

What Could It Look Like in 2025?

Bryan N. Alexander, Business Officer

www.nacubo.org/Business_Officer_Magazine/Magazine_Archives/July/
August_2016/Future_Reference/The_Next_Chapter/What_Could_It_Look_Like_in_2025.html
Technology Trends

Wearables, Wi-Fi, and the Internet of Things—just three factors to consider in the next wave of ed tech. Plus, prepping for a new LMS and next-generation online learning.

Secrets of Online Learning

If your institution is expanding online learning, is it planning that growth strategically? Writing recently in Academic Leader Today, Brian Udermann suggests mining key data to determine which courses are top candidates for online learning. Start with courses that are attracting transfer students, he suggests, and with high-demand courses or those “for which your institution consistently struggles to offer enough sections.” Another idea: ask students what online courses they would like to take.

For discussion

As more institutions grow their online learning presence, the need to purposefully manage that expansion becomes more acute. Sometimes projections for expenses and profits are just not realistic. Strategic planning can help shape logical paths to online growth and determine how best to use resources for course development. How methodical—and realistic—is your institution when it comes to mapping out its own future for online learning? How can you convince faculty and staff who may be planning-averse about the importance of strategically planning for online learning?

Deeper dive: Getting Real About Online

The insightful blog e-Literate recently recounted how the University of Florida turned around a troubled online program. Author Phil Hill says when UF Online, started in 2013, didn’t achieve its (overblown) projections of students and profits, the program seemed doomed. But a new director helped right the program, changing the way it’s managed and forecasting attainable enrollment goals. Focusing less on administrative goals and more on student needs also helped.

Makerspaces That Do More Than Make

Higher ed tech guru Kyle Bowen, who directs teaching and learning with technology at Pennsylvania State University, argues that makerspaces should not be focused just on making things. Talking specifically about 3-D printing labs, he says their highest value comes from their innate ability to help students learn to collaborate, think critically, and solve problems. Those are “components of developing a ‘maker fluency’ that will help students productively apply what they learn” in the future, Bowen says.

For discussion

As institutions distribute makerspaces across campus, making them accessible to faculty and students in disciplines far beyond the STEM fields, is your institution doing all it can to make sure such spaces aren’t merely manufacturing factories? Bowen, for example, says that “labs are more than a place to access 3D printers. Providing guidance to both students and faculty is critical to helping them get the most from a creative experience.” How can your institution tease out that kind of value-add from its investment in maker spaces?
Survey Says: Accessibility Up, Blended Learning Down

What insights can we glean from the latest EDUCAUSE Learning Initiative (ELI) survey of key issues for teaching and learning? Behind evergreen concerns like the need for ongoing faculty development and academic transformation, developing student competencies in digital and information technologies moved from eleventh place in 2016 to third in 2017. Interest in “accessibility and universal design for learning” ranked fourth in 2017, up from ninth or tenth in previous years. Fifth for 2017 is “competency-based education and new methods of assessing student learning.”

For discussion
Traditionally slow to change, practices in teaching and learning may be evolving at a faster pace. ELI finds, for example, that a recently hot trend, online and blended learning, is moving down in its survey—perhaps because such practices are “maturing and becoming ubiquitous.” As your institution works to advance teaching and learning, is it focused on yesterday’s issues—or on those that will have a deeper impact in the days ahead?

What’s Next for Your LMS?

One recent projection suggests that 15 percent of colleges and universities are about to replace their learning management systems (LMSs). The Center for Educational Innovation at the University at Buffalo concludes that future LMSs will need to integrate well with other campus IT systems, include advanced learning analytics, enable better personalization of student learning, and broadly support collaboration. Paul LeBlanc, president of Southern New Hampshire University, recently said that next-generation LMSs ought to be Learning Relationship Management (LRM) systems that “take us from the merely transactional to the powerfully transformative.”

For discussion
How much time and effort does your institution invest in deciding what LMS best fits its needs? The stakes are extraordinarily high to get this one right. If your institution is thinking about its next LMS—in the short term or down the road a bit—are those discussions sufficiently broad and are the right people at the table? The choice of an LMS argues strongly for building a coalition of planners and forward thinkers who have the capacity to collaborate across campus silos.

Making Online Learning Accessible

Prompted in part by a ruling last summer from the U.S. Department of Justice that much of its online educational material was not adequately accessible to people who are blind, deaf, or hard of hearing, the University of California at Berkeley decided to firewall some older material even while exploring ways to make new material more accessible. Separately, Michigan State University has developed procurement policies to help ensure that considerations of accessibility are baked into IT purchases.

For discussion
Cal’s experiences show that we still have a ways to go to ensure accessibility of online educational material. Michigan State’s experiences show a way to help ensure accessibility. How accessible are your institution’s materials, and how does your institution make sure that accessibility considerations are top of mind for staff and faculty?

Cybersecurity Threats from the IoT

In a recent survey, ISACA, the organization previously known as the Information Systems Audit and Control Association, finds that the Internet of Things (IoT) has overtaken mobile technology as a focus for cyberdefense in organizations. “As IoT becomes more prevalent, cybersecurity professionals need to ensure protocols are in place to safeguard new threat entry points,” ISACA says.

For discussion
Reliant on technology, universities have many potential vulnerabilities to cyberattack. How vigilant are your institution’s protections? Do they focus on tomorrow’s key threats, like attack via the Internet of Things? ISACA finds that only about half of organizations have formal processes in place to address growing threats like ransomware. How well is your institution prepared for such threats? How regularly does it test its cybersecurity protocols?
Can Wearables Boost Learning?

A first-ever conference at Stanford University recently explored the notion that wearable technology such as smart watches, smart clothing, fitness trackers, and the like might lead to improved learning. Researchers are assessing wearables to track how factors like emotions or even posture can affect a student’s engagement in learning. One idea is that students can improve their learning by using wearables to analyze their own performance.23

For discussion

Evolving technologies like wearables and artificial intelligence have capacities to improve human learning that we’re only just beginning to explore. Can your institution be a leader in this space? As technology is leveraged to improve outcomes in new ways, how might you continue to hone pedagogy, curriculum design, and pathways to student success?

Want Happier Students? Get Faster Wi-Fi

The ACUTA/ACUHO-I 2017 State of ResNet Report offers many insights. Institutions are offering students more bandwidth and spending more money on Wi-Fi. Moreover, administrators appreciate how a high-performing network helps students stay enrolled in a given institution. ACUHO-I executive director and CEO Mary DeNiro says, “now more than ever, it’s imperative that housing, IT, and business officers collaborate to create an optimal environment for living and learning.”24

For discussion

The quality of the wireless network that students can access—from their dorm rooms and elsewhere—is more than just an IT concern. Quality networks help institutions retain students. Given that many institutions are scrambling to find enough students, that’s critical. At your institution, are administrators from student affairs, IT, the business office, and other diverse functions on the same page about this? If not, how can your institution ensure that these functions work across their silos to collaborate around a common vision for residential networks?

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Malcolm Brown and Veronica Diaz, EDUCAUSE Review

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University at Buffalo Center for Educational Innovation

18 Moving from the Transactional LMS to the Transformational LRM
Paul J. LeBlanc, Education Technology Insights

19 Looking Beyond the LMS: Why a Single App Won’t Work
David Raths, Campus Technology

20 Why UC-Berkeley Is Restricting Access to Thousands of Online Lecture Videos
Sarah Larimer, Washington Post
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21 Building Accessibility Into IT Procurement
David Raths, Campus Technology

22 Hands Tied: Half of Organizations Say Cyber Attacks Are on the Rise, but Resource Constraints Persist
ISACA, Cybersecurity News

23 Wearable Tech Weaves Its Way Into Learning
Marguerite McNeal, EdSurge

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To Pick the Right Tools for Student Success, Ask the Right Questions

Based on interviews with campus decision makers and vendors in the private sector, an insightful recent report takes a close look at how institutions choose technology to support student success. Researchers from EdSurge HigherEd find that “without a broader vision for student services redesign,” campuses may tend to default to faculty-focused tools that solve immediate, tactical needs but in piecemeal ways. They urge campus decision makers to think more strategically and shift the focus from products to problems. Another key takeaway: Before shopping for a product, “colleges must first define what they mean by student success.”

As one example, the report cites a college with a paper-based degree planning program that bought a web-based tool designed to help advisors “parse student data and highlight alternative paths to graduation.” After applying the tool, the institution found that while it streamlined staff efficiency it did not improve student outcomes. The report notes, “college leaders began to realize they needed to ask a deeper set of questions” around student success.

The report suggests a problem-based framework to help institutions weigh purchasing decisions about student success technology in ways that address the needs of students, faculty, staff, and the institution as a whole. To help decision makers evaluate student success tools, the report suggests thinking about products in a “honeycomb” of six tool categories—coaching, connections, data infrastructure, early alert, planning and mastery, and predictive analytics. An extensive appendix outlines how tools from 17 companies can serve campus needs in those categories.

b Crossing the Finish Line: Vetting Tools that Support Student Success
EdSurge HigherEd
Economic Trends

As partnerships become a more common financial tool and public institutions get more intentional about fund-raising, institutions also have their eye on health care costs, student debt, and the true cost of credit hours and online programs.

P3s to the Rescue?

A firm that helps manage public-private partnerships (P3s) in higher education has seen an average of 50 percent year-over-year growth in P3s since 2011. Growth has been particularly explosive over the last three years. Most public-private partnerships in higher education today center on revenue-generating physical assets like dormitories, parking facilities, dining facilities, hotels, and hospitals. But the definition of a P3 is being expanded to include other kinds of joint ventures, such as academic programs, often online, developed either partially or entirely by private-sector vendors and collaborations with community groups to meet local social needs.

Public U’s Boost Private Fund-Raising

Western Illinois University (WIU) president Jack Thomas made headlines recently when he announced that WIU was hiring a full-time fund-raiser to seek private donations. The impetus for WIU—lower state appropriations for higher education—has also led other public universities to boost their development efforts. Thomas says budget constraints have forced WIU “to act more like a private institution.” That trend, building now for years, will likely only expand.

For discussion

We expect that resource-constrained private and public institutions will continue to make P3s a more prominent part of their evolving business models. Has your institution fully explored the possibilities inherent in P3s as well as their associated risks? Does your institution have a strategy for engaging in P3s? If more P3s are in its future, does your institution have policies in place to make partnerships run as smoothly as possible from conception to sunsetting?

Deeper dive

According to the Center on Budget and Policy Priorities, 46 states spent less for higher education in 2015–16 than they did before the recession of 2008. Moreover, states cut funding deeply after the recession, spending an average of 18 percent less per student. Per student funding is down by more than 30 percent in nine states. Appropriations have started to bounce back—38 states increased funding per student in 2015–16—but not to pre-recession levels.
Heath Care Costs: Watchful Waiting

In its 2016 survey of university employee health care and related benefits, CUPA-HR finds that more institutions are offering high deductible health (HDH) plans and fewer are offering workplace wellness plans and long-term care plans. And even as more universities rely more heavily on contingent faculty, only about one-third of institutions provide health care benefits to part-time staff and faculty. For discussion

Managing escalating costs for employee health care coverage is a challenge across higher education. But the CUPA-HR survey warns that a confluence of policy changes could produce greater challenges in the coming year. One factor is the U.S. Department of Labor’s increase in the annual salary threshold for exempt employees from $23,660 to $47,476. How well is your institution prepared for these new circumstances? Have changes to federal rules affected staff eligibility for health benefits? What new strategies are needed to balance employee benefits with rising costs, especially in the wake of new federal policies?

Toward Transparent Budgeting

To make the budgeting process more transparent, Metropolitan State University of Denver created a new budget task force that draws representatives from across campus. Given considerable budget authority, the group engages in rigorous discussion and consensus voting to build a budget it proposes to the president. Every unit’s priorities must link to the university’s plan, and decisions are tied to key indicators like enrollment. For discussion

Metropolitan State’s vice president for administration and finance says the new structure makes for some arduous discussions, but it also builds trust, creates a shared understanding of where priorities come from, and helps people see that “there are no hidden pots of money.” In comparison to the Metropolitan State model, how transparent and democratic is budgeting at your institution? How might your institution align budgeting more directly with strategic planning?

Anxieties Build About Student Debt

Apprehensions about student debt are getting more pronounced. While recent concerns have focused on the ability of students who never graduate to pay back even small loans, the Federal Reserve Bank of New York recently found that the number of borrowers with loan balances over $100,000 has risen four-fold in the last 10 years. Worse, default rates among those borrowers shot up from 6 percent a decade ago to more than 20 percent today. Downstream, the bank says, such debt loads could constrict home ownership and consumer spending. For discussion

Every institution is aware of the burden of student debt. Nonetheless, debt loads continue to build. That disconnect may be pushing the public—and lawmakers—to a breaking point. One implication is that tuition rates may have reached their upper limits (see sidebar below). Going forward, it seems likely that students will do more comparison shopping for college, parents will be even more exasperated with the cost of college, media stories will continue to focus on college debt, and lawmakers may voice even louder demands for higher education to rein in its expenses. Is your institution fully prepared for those conversations?

Calculating Cost Down to the Credit Hour

With funding more constrained than ever, institutions need to pay particular attention to how much it costs to educate students in given academic programs. Many institutions are becoming more sophisticated in assessing the cost of instruction. To get a more granular look at program costs, for example, Central Piedmont Community College developed a way to calculate program costs by credit hour by course and per student. For discussion

Central Piedmont uses the Boston Consulting Group’s Growth Share Matrix to help it assess the relative demand for and cost of its programs. That analysis helps it allocate resources appropriately, decide how to consolidate programs, and fund-raise. How well does your institution assess its program costs? Do program cost analytics help your institution make sound decisions?
True Costs of Online

The common wisdom suggests that online courses cost less to produce and deliver and should therefore cost less for students. But in a recent survey from WCET (the WICHE Cooperative for Educational Technologies) more than half of respondents (54.2 percent) reported that distance students pay more than on-campus students when tuition and fees are added. Asked to assess 21 component costs of delivering online courses, respondents said none of the 21 components cost less for distance courses versus those offered face-to-face—and costs were higher for nine components.33

For discussion
Online education has been touted as a cost saver for universities and students. But the reality may be more nuanced. How thoroughly has your institution calculated the costs of developing and delivering online education? How accurately are your online courses priced?

Geography and Destiny

As the number of high school graduates declines and institutions struggle to meet enrollment goals, we hear a lot about recruiting more adult, transfer, and minority students. Researchers from the University of Pennsylvania suggest there might be another overlooked population: rural youth. The researchers say that rural youth face a host of “social, economic, and spatial barriers that hinder postsecondary access and completion.”34

For discussion
The researchers suggest that “targeted outreach, recruitment, institutional and financial supports for rural and other geographically underrepresented students” can boost college completion rates. The win-win may be that helping more rural students complete college might also help universities fill their classrooms. Could your institution be doing more to serve this underserved population?
**Tuition Past the Tipping Point?**

After inching up for years, has the cost of college finally hit a ceiling? Analyzing net price data from more than 2,000 colleges against benchmarks of household income and family size, the Institute for Higher Education Policy (IHEP) finds that most colleges (90 percent) are affordable for students from families making $160,000 or more, but low- and moderate-income students can afford only one to five percent of colleges. IHEP says “the college affordability problem in America is not only real, but is largely a problem of inequity.”

The College Board projects that when today’s babies go to college, tuition, fees, room, and board at a public university will cost $52,491 a year. The cost for private higher education is projected at some $116,680.

*For discussion*

Especially as more low-income students strive to attend college, how can your institution keep costs affordable? If tuition levels are no longer affordable for many students and the practice of tuition discounting is pushed to its upper limits, how can colleges develop revenue streams that don’t depend on continually increasing tuition? Where can already-pinched colleges pare costs to keep college affordable?

c **Limited Means, Limited Options: College Remains Unaffordable for Many Americans**

Alain Poutré, Jamey Rorison, and Mamie Voight, Institute for Higher Education Policy

[www.ihep.org/limited-means-limited-options](http://www.ihep.org/limited-means-limited-options)

d **What’s the Average Cost of College**

Vanguard Group

Environmental Trends

On the sustainability front, the cost of carbon remains a concern. Meanwhile, institutions pursue innovative ideas for repurposing facilities like parking garages, libraries, and classrooms.

Anti-Carbon, Pro-Paris

For decades, colleges and universities have been leading the work to control carbon emissions. In one of the latest salvos, 33 presidents recently signed a letter calling on their fellow leaders across higher education to “put a price on carbon.” The presidents believe that carbon pricing creates incentives to reduce greenhouse gases, create cleaner air, and curb climate change. In June 2017, meanwhile, after President Trump withdrew the United States from the Paris Climate Agreement, nearly 120 colleges and universities pledged to uphold that accord.

For discussion

The presidents’ letter about carbon pricing and higher education’s support for the Paris Climate Agreement made headlines, which speaks to the ongoing role that many colleges and universities play as environmental advocates. Has your institution had recent conversations about what its role, if any, should be in this space? Has “initiative fatigue” set in around your institution’s sustainability efforts, and if so is it time for a reboot?

Transitioning Garages from Parking to Learning

With driverless cars on the horizon, the time may be right to think about repurposing parking garages. Architect Andy Cohen envisions ways that parking facilities could be converted to other uses—such as raising the floor height, making sure floors are level between ramps, adding modular sections, and outfitting garages with utility hookups that anticipate future conversions to workspaces. Some such potential uses could be anticipated in original building designs.

For discussion

Institutions may build parking garages today expecting to tear them down at the end of their life cycle, but is there merit in designing these facilities with an eye toward converting them to classroom or other educational use in the future? Is your institution integrating the potential for repurposing into its designs—not just for parking garages, but for all new facilities?

One College’s Holistic Approach to Sustainability

Lewis & Clark College has been named a top Sierra magazine “Cool School” for five years in a row. The Oregon institution insists that 95 percent of its new buildings be LEED-certified, that 28 percent of its food comes from within 250 miles, and that more than 60 percent of its waste be recycled or composted. Known for environmental studies, the school offers a law degree in environmental, natural resources, and energy law and a master’s-level certificate in ecopsychology.

For discussion

Like other Sierra honorees in higher education, Lewis & Clark’s sustainability commitment has roots across campus—on both the administrative and academic sides. What lessons can your institution draw from that comprehensive approach? Looking across the entire enterprise, how deep and how broad is your institution’s commitment to sustainability? What more could your institution be doing to protect the planet?
Goodbye Books, Hello Nap Pods?

There’s a lot that’s new in the University of California at Berkeley’s recently renovated undergraduate library: more meeting space for small-group work, moveable modular furniture, individual study space for more patrons, and even a space-age-looking “nap pod” where students can recharge. Gone are some 135,000 books—as well as bans on eating that were designed to protect those volumes.

For discussion
University libraries continue their transition into more actively engaged campus partners in instruction, learning, and research. As the Ithaka S+R survey suggests, though, administrators may not fully appreciate that transformation and the emerging roles of libraries. How can stakeholders at your institution better align their thinking about what 21st-century university libraries can and should be? How can campus library staff better articulate their vision for next-generation libraries?

Deeper dive
In its latest survey of academic library deans and directors, the research and consulting service Ithaka S+R finds that library leaders believe they play an important role in student success, “yet many find it difficult to articulate these contributions.” Those surveyed also say faculty members do not fully appreciate how libraries help students succeed. The report finds that library directors “feel increasingly less valued by, involved with, and aligned strategically with” university leaders.

Quiet, Please

Like many academic buildings, Schow Science Library at Williams College had a noise problem. Sound reverberated off the building’s high ceilings and brick walls, making the structure “acoustically lively” in the words of one librarian—and bothering patrons. Sound-absorbing panels could help but would be costly and unsightly. So engineers turned to technology. They installed a sound masking system that adds properly tuned background sound—quieting student complaints about noise while preserving the building’s aesthetics.

For discussion
Many institutions need to repurpose existing buildings for new applications or to accommodate growing student populations. That process can create situations that might require noise abatement—in large atria, for example. How well is your institution addressing noise distractions in repurposed areas? Are your spaces conducive to both group work and quiet study by larger groups of students?

New Vocabulary for “Classrooms”

We’re hearing that the concept of “classroom” may have outlived its usefulness. That topic was discussed at the 2017 “Reimagine Education” conference. EdSurge reports that one speaker said “the mental model of the traditional classroom is obsolete” and “does not take into account all of the developments that we know about the way people learn.” Another speaker said better concepts might be “learning environments, life spaces, enlightenment zones, and, even, Starbucks.”

Toward Integrated Mobility

Analysts from McKinsey & Company say that trends toward autonomous driving, ride sharing, and more electric vehicles combine to create what they call a transition to “integrated mobility.” Among other effects, this trend could help improve air quality and reduce traffic-related fatalities. Reaping the full benefits of integrated mobility will require new thinking about land use—parking, for example—and changes in infrastructure, particularly in support of more public transportation.
For discussion

How might a transition to integrated mobility affect your institution? Is your institution gearing up to accommodate more autonomous driving and electric vehicles? Could data from the Internet of Things reduce traffic congestion and parking issues on your campus? Is your institution prepared for a future that includes more ride hailing and less car sharing? What might be the impact of integrated mobility on future infrastructure development at your institution?

Timber Construction: Barking Up the Right Tree

It’s a long way from replacing concrete and steel, but “heavy timber” is getting attention as a more sustainable construction practice. A pioneer in higher education is the University of British Columbia, which boasts several wood-intensive buildings, including an 18-story student residence, Brock Commons Tallwood House, with walls made of cross-laminated timber (CLT). A new building for the University of Massachusetts Amherst’s design school is said to be the first academic building in the United States to have a structural frame made of CLT.

For discussion

George Kimmerle, president of Kimmerle Group, sees the use of heavy timber as a way for institutions to make a statement about sustainability and achieve sustainable outcomes. Might heavy timber be an option for your institution’s next capital project? Given that several universities have major research initiatives on heavy timber underway, might there also be an academic “play” for your institution in this evolving arena?
FOOD FOR THOUGHT

Cradle-to-Grave Building Sustainability

The 2016 edition of a report on the “state of sustainability” in higher education urges institutions to do more to reduce the environmental impact of each phase of a campus building’s life cycle—“from construction to operation to capital reinvestment to demolition.” A specific concern is carbon emissions; the report says institutions consistently underestimate the carbon “embedded in purchased goods and the construction, capital reinvestment, and demolition processes.”

Formal policies that promote sustainability and help minimize environmental impact are common for new construction projects, the report notes, but are largely missing from other phases of the building life cycle. Current standards may be underreporting carbon emissions by as much as 37 percent. New methodologies may be needed to estimate those “missing” emissions.

For discussion
How well does your institution measure the sustainability impacts of a given campus building over its entire life span? Could or should it do more to report more fully on the carbon impact of those projects?

Sightlines and the Sustainability Institute at the University of New Hampshire
Political Trends

While President Trump’s higher education policy evolves—with implications for Pell Grants, research funding, and possibly apprenticeships—more public institutions may merge as state spending for colleges and universities continues to be flat at best.

Trump’s “Skinny” Budget and Higher Education

Unease registered throughout the higher education community in March 2017 when President Trump released his “Budget Blueprint” for FY 2018. The plan would cut funding for the Department of Education by $9 billion. It would eliminate or reduce college aid programs like the Supplemental Educational Opportunity Grant (SEOG), work study, and TRIO and GEAR UP.

For discussion
If these budget cuts are passed, the flow of research funding to colleges and universities could be slowed significantly. University staff—from star researchers to graduate students and lab assistants—could be affected, to say nothing of the potential impact on facilities and research programs. How well is your institution prepared if such possibilities come to pass?

Red Light for Research Funding?

It’s a long way between proposed budgets and policy, but President Trump’s proposed budget targets research funding in big ways. The National Institutes of Health would take a $5.8 billion hit, the Energy Department would get a $900 million haircut, and the budget for the Environmental Protection Agency would be trimmed by nearly a third (31 percent). Beyond reducing money available for university research grants, the administration is eyeing significant cuts in the overhead reimbursements universities receive from such grants.

For discussion
While the president’s proposals are likely to be scaled back by Congress, his plans constrict federal support for higher education. How might such cuts affect your institution? For example, how might federal financial aid reductions affect your students’ ability to afford college? What impact might cuts in research funding have? Might influential stakeholders at your university be in a position to advocate on Capitol Hill for the importance of federal investment in higher education?

Apprenticeships in the Spotlight

While the contours of President Trump’s higher education policy are only starting to come into focus, in June the president signed an executive order focused on expanding federal support for apprenticeships to train workers for unfilled jobs. The president wants business and higher education to partner to provide apprenticeship opportunities, and it is unclear whether he would propose new federal funding.

For discussion
While institutions like community colleges stand to benefit from federal interest in apprenticeships, other types of colleges and universities may need to do more to show how they contribute to workforce development. Is your institution positioned to claim a seat at the table when apprenticeships are discussed? What would be your institution’s response to criticisms that “elite” institutions readily offer internships but don’t do enough to sponsor blue-collar apprenticeships?
Repercussions of the “Travel Ban”

Although more than a million international students studied in the United States in 2015–16—a record—whether that flow will remain as robust seems uncertain after President Trump’s recent travel bans. In a recent survey, 39 percent of universities reported declines in international student applications for next year. Thirty leading universities argued in a legal brief that such bans inflict undue burdens on international students, faculty, staff, and scholars; impede research collaboration and educational missions; may harm the economy; and undercut work to promote diversity and inclusion.

For discussion
Many colleges and universities want a slice of the nearly $33 billion international students are estimated to contribute to the U.S. economy, and both higher education and the private sector have come to rely on the skills of international students and scholars. Has your institution fully considered what effect the slowing of talent from abroad might have? What steps can your institution take to mitigate that potential impact? Can key stakeholders at your institution press the case for international scholarship and exchange with federal lawmakers?

Deeper dive
Recent research by the National Bureau of Economic Research finds that “a significant set of public universities were able to take advantage of the expanding pool of potential students from abroad to provide a stream of tuition revenue that partially offsets declining state appropriations.” Looking at 1996 through 2012, researchers estimate that a 10 percent reduction in state appropriations was associated with an increase in foreign enrollment of 12 percent at public research universities and about 17 percent at the most “resource-intensive” public universities. Without foreign students, they suggest, many universities would have had to make deeper cuts in spending and “potentially greater increases in in-state tuition charges.”

More Merging Ahead?

We’re hearing more discussion about mergers of colleges and universities. Perhaps noting how Georgia combined 11 of its public universities into seven schools (with more mergers possibly in the offing), Pennsylvania officials are said to be considering merging some public institutions in that state. Within private higher education, two Catholic universities in South Florida are weighing an alliance, as are Nazarene universities in Tennessee and Massachusetts.

For discussion
While evidence so far is thin, proponents of mergers say they can help save money and lead to operating efficiencies. Advocates also say some mergers, such as ones between two- and four-year institutions, can help students succeed academically and graduate. Expect more talk about college mergers—and other forms of partnerships—in the days ahead. Has your institution thought creatively about how mergers, partnerships, and other alliances might help it deliver on its mission?

Mixed Signals from Governors

The American Association of State Colleges and Universities gave a close read to “state of the state,” inaugural, or budget addresses delivered recently by governors of 47 states. What emerged was something of a disconnect. While state leaders continue to view higher education as “a paramount policy lever for improving state economic development,” cutting funding for higher education was a constant theme across the speeches.

For discussion
Generally depressed since the Great Recession of 2008, state funding for higher education has recovered a bit, but not to pre-recession levels. For the near term, at least, state funding is not expected to be especially robust. Particularly if your institution is public, has it fully analyzed the ramifications of this trend? Has it adjusted budget assumptions appropriately? Has your institution done all it can to create and nurture new revenue streams?

Deeper dive
The Federal Reserve Bank of Cleveland finds that in the late 1980s, public colleges received three times more revenue from state and local governments than they did from tuition. By 2013, though, revenues from tuition were about even with those from public funding. That trend moved one analyst to observe that “the notion of a state college as government-funded public good is slowly disappearing.”
Offering Sanctuary

As of the end of 2016, as many as 28 colleges and universities—including the University of California system—had officially asserted that they would offer protection for undocumented students.\(^59\) Specifics vary, but one common denominator is resistance to assisting immigration officers unless required by law. Other institutions, such as the University of Utah, have said no to being sanctuaries but have boosted support to help undocumented students succeed in college.\(^60\)

For discussion

Given that immigration is likely to continue to be debated in the American political landscape, what positions on undocumented students best suit your institution’s culture? Has your institution fully discussed the political ramifications of this contested issue? Has it fully considered the different definitions of “sanctuary campus”? If your institution elects not to adopt sanctuary status, has it or should it consider other ways of assisting undocumented students?

Pell in Peril?

Pell Grants, the lifeblood of students and universities, may again be at risk. Even while the Department of Education announced the revival of summer Pell Grants for 2017, lawmakers still had their eyes on the so-called Pell “surplus,” a $10.6 billion pot of money that is essentially a rainy day fund to help ensure sustainability of student aid. President Trump has proposed taking $4 billion from that corpus.\(^61\) Even if federal lawmakers don’t approve that, they still might try to tap some of the money for other purposes.

For discussion

Every college and university should be vigilant in watching to see how legislative discussion and action at the federal level affects the Pell Grant program, which has been widely hailed as a financial cornerstone that helps low- and moderate-income students get to college. Is your institution prepared to lobby Congress on behalf of this essential program?
Ready or Not, Here Comes Platform Thinking

An emerging school of thought suggests that the delivery of a college education could evolve to a model of multisided platforms.

Writing recently in Inside Higher Ed about a couple of books on that topic, Joshua Kim describes a multisided platform as one that matches buyers and sellers of a service or product but does not offer that service or product itself. Examples today include Airbnb and Uber. Kim writes that the central argument of one of the books, Matchmakers: The New Economics of Multisided Platforms, is that the model of multisided platforms “has the potential to disrupt incumbent industries at a pace and scale that are dramatically different than in the past.”

Kim posits that higher education may already be predicated on a multisided platform model. “A college or a university is a platform for investigators to conduct their research, and for educators to teach their disciplines—as much as it is a platform for students to gain experiences, an education, and a credential,” he writes.

For discussion

Kim posits several salient questions: “How should the track record of multisided platforms disrupting incumbent industries influence how we think about postsecondary innovation?” “Is higher ed ripe for a new set of competitors to leverage the advantages of unlimited bandwidth and ubiquitous computing to improve access, lower costs, and increase quality?”

Reading ‘Matchmakers’ and Wondering If Higher Ed Is a Multisided Platform?
Joshua Kim, Inside Higher Ed

About the Society for College and University Planning (SCUP)

The Society for College and University Planning is a community of higher education planning professionals that provides its members with the knowledge and resources to establish and achieve institutional planning goals within the context of best practices and emerging trends. For more information, visit www.scup.org.

What is Integrated Planning?

Integrated planning is the linking of vision, priorities, people, and the physical institution in a flexible system of evaluation, decision-making and action. It shapes and guides the entire organization as it evolves over time and within its community.