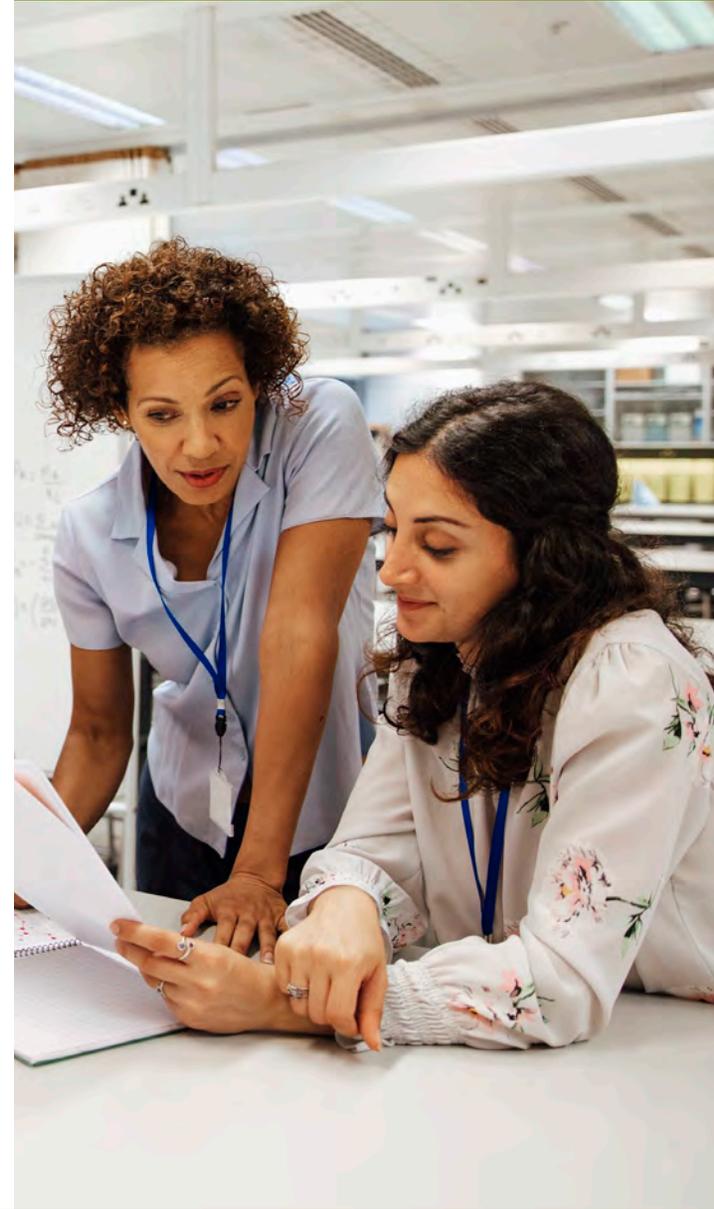
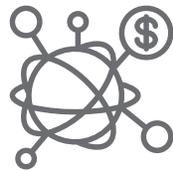




The Society for College
and University Planning

Trends

FOR HIGHER EDUCATION



SPRING 2020 Trends Inside Higher Education



Trends



The Society for College and University Planning

Inside Higher Education

Within the world of higher education, what are some of today’s key trends—and what are some implications for institutions of higher learning?

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 and your team analyze and act on the trend.

Social Trends

What are the implications of an aging workforce on our campuses? How is the evolution of credentials—including the bachelor's degree—affecting higher education? How can institutions respond more effectively to crises?

55+ at 33%

Nearly one in three employees in higher education is 55 years old or older, according to a report from the College and University Professional Association for Human Resources (CUPA-HR). That means institutions need to pay close attention to the pipeline for future staffing needs, the report notes. And that may be particularly true for skilled craft, facilities, and service/maintenance departments, which have the highest percentages of older workers.¹

◆ For discussion

- Which areas of our institution will be most affected by retirements in the next five years?
- How will we mitigate the impact of retirements, including the loss of knowledge, experience, and institutional memory?
- Does the coming wave of retirements present some opportunities for retooling our staff? How might we take advantage of that?

¹ Adam Pritchard, Jingyun Li, Jasper McChesney, and Jacqueline Bichsel, "The Challenges of an Aging Higher Ed Workforce," CUPA-HR (August 2019), www.cupahr.org/surveys/research-briefs.





Whither the BA?

Scanning the horizon for higher education, Richard Price, a research fellow at the Clayton Christensen Institute, thinks the traditional bachelor's degree may be in decline. Price says one culprit is degree inflation, including employers overvaluing four-year degrees that may not be necessary for given jobs. Other challenges, he says, are federal efforts to promote apprenticeships and career and technical education, researchers' calls for "more pathways to associate degrees and other certifications," and entrepreneurs who are inventing faster ways to educate learners. Solutions? Price says traditional colleges and universities should consider providing "a wider variety of traditional credentials like associate degrees, certificates, or professional certifications." Long term, he urges more attention to competency-based education.²

◆ For discussion

- How would our institution fare in a world where the bachelor's degree is no longer the main credential sought by students?
- What opportunities do we have to expand the types of credentials we offer—certificates, badges, and other non-degree diplomas? What would we need to do to act on those opportunities?
- Looking long term, how could the growing acceptance of competency-based education affect our institution?

2 Richard Price, "A Degree Decline is on the Horizon: How Universities Can Respond Before It's Too Late," Clayton Christensen Institute (October 17, 2019), www.christenseninstitute.org/blog/a-degree-decline-is-on-the-horizon-how-universities-can-respond-before-its-too-late.

Giving Them Way Too Much Cred(entials)

Between postsecondary educational institutions, MOOC (Massive Open Online Course) providers, non-academic organizations, and secondary schools, some 738,428 unique credentials are offered in the United States. That number underscores a challenge: Institutions, learners, accreditors, government agencies, and employers are struggling to understand, assess, and communicate the value of given credentials. To address that challenge, the nonprofit organization Credential Engine is building a searchable Credential Registry (<https://credentialfinder.com>), which it hopes will help standardize what different credentials mean and how they are used.³

◆ For discussion

- From degrees to badges to certificates, how many credentials does our institution offer? How well are they understood by students? By employers?
- What process does our institution follow for creating new credentials? Are the same standards applied consistently to all credentials?
- How "standardization-friendly" are our credentials? Are credentials couched in common terms (e.g., using the Credential Transparency Description Language) and are they published to the Credential Registry?

3 Credential Engine, Counting U.S. Postsecondary and Secondary Credentials, April 2019, https://credentialengine.org/wp-content/uploads/2019/09/Counting-US-Postsecondary-and-Secondary-Credentials_190925_FINAL.pdf.

To B School or Not to B School

With applications to business schools down 7 percent in the United States, B schools are making some changes. Some are starting online master's degrees that are cheaper for students than similar face-to-face programs; others offer bundles of courses that stop short of a degree. Big changes are also afoot in the curriculum, with more attention to ethical issues and the role of business in contributing to the public good, as well as more emphasis on technical skills.⁴

◆ For discussion

- How has business education at our institution evolved to reflect current market realities and student demands?
- How much of our curriculum addresses ethics and social responsibility in business? Do we teach business-related technical skills? Are there opportunities for interdisciplinary collaboration to incorporate those topics into the curriculum?
- Could new business degrees and new delivery modalities help our institution be more competitive?

Crisis Response: Big Picture and Small Details

Acknowledging that universities today seem more prone to crises, a new book nudges institutional leaders to take a big-picture view even while they manage minute-by-minute issues. Beyond upheavals like fires and floods, the book suggests, leaders need to be perceptive enough to recognize less obvious crises, including changes in public opinion about an institution. Another tip: Eschew “spin” and instead manage threats to an institution's reputation in ways that have a firm grounding in the organization's principles and values.⁵

◆ For discussion

- What was the last crisis our institution faced? How did we handle it? Were we prepared?
- How do we plan for crisis management now? What policies, procedures, and training are in place?
- How does our institution define a crisis? How do we scan our environment and identify potential crises?
- What is our communication plan for crises? How are our institution's values reflected in our communications about and responses to crises?

⁴ The Economist, “American Business Schools Are Reinventing the MBA,” November 2, 2019, www.economist.com/business/2019/11/02/american-business-schools-are-reinventing-the-mba.

⁵ Ralph Gliotti, “The Best Way to Prepare for Disaster: Crisis Leadership and Higher Ed,” The Evollution, (November 1, 2019), https://evollution.com/managing-institution/operations_efficiency/the-best-way-to-prepare-for-disaster-crisis-leadership-and-higher-ed.



Demographic Gloom Might Have a Silver Lining

Demographic trends have many institutions facing falling enrollments. Where others see a potential disaster, the Commissioner of Higher Education in Massachusetts, Carlos E. Santiago, sees opportunity to improve access to higher education. “Massachusetts and other states can’t overcome enrollment challenges without addressing persistent opportunity gaps identified by race, gender, and ZIP code,” he recently wrote. “I believe the enrollment crisis may be a blessing in disguise if it forces colleges and universities to confront racial inequities with new fervor.”⁶

◆ For discussion

- How accessible is our institution? How effectively have we addressed opportunity gaps?
- In our community/state/region, who is *not* enrolling in our institution? Is there an opportunity there?
- What kind of evidence-based strategies can our institution follow to recruit and retain more black and Latinx students?



6 Carlos E. Santiago, “Driving Equitable Access in Higher Education,” Education Commission of the States (November 7, 2019), <https://ednote.ecs.org/driving-equitable-access-in-higher-education>.

Experimentation Toward Innovation

A decade ago, Dakota Wesleyan University faced major challenges, including declining enrollments and budget deficits. Rejecting quick fixes, the institution decided instead to develop a culture of innovation as a strategic way to reposition itself. Today, says President Amy Novak, the university pursues experimentation through a model based on “ideation, intelligence, iteration, implementation, and impact assessment.” Through the model, she says, “more ideas can be tested more quickly for viability,” staff “embrace a higher level of risk tolerance and become active change agents,” and “culture shifts occur as new ideas are tested and greater buy-in is achieved through [pilot testing].”⁷

◆ For discussion

- How well does our institution innovate? How could we improve?
- How does our institution try out new ideas? Do we have a process for piloting, iterating, and scaling change?
- What is a new idea or change that’s been adopted in our institution? Why was that adoption successful? Can that be replicated?

Teaching Doctors About Climate Change Impacts

Climate change is beginning to impact medical school curricula. According to the Association of American Medical Schools, “more medical schools are tweaking the curriculum to address climate-related threats to humans—from growing rates of asthma due to a warming planet to problems related to heat exposure and weather disasters.” At Colorado School of Medicine, for example, fourth-year students can take a new elective on climate medicine. Students at Tulane University School of Medicine helped push the school to create a new course on climate and health.⁸

◆ For discussion

- How do the curricula at our institution address climate change and its effects? Is this true for programs that have not traditionally studied climate change?
- How much do we know about how climate change will impact our day-to-day lives?
- How are we helping students understand climate change and its effects? Are we equipping them with the knowledge and skills to mitigate impacts and mobilize solutions?

7 Amy Novak, “Building an Innovation Culture in Higher Education,” president2president (October 1, 2019), www.president2president.com/library/2019-2020_ch2#.

8 Beth Howard, “Climate Change in the Curriculum,” AAMCNews (October 10, 2019), www.aamc.org/news-insights/climate-change-curriculum.

A Closer Look

Retraining and Upskilling: the 60-Year Curriculum

We're hearing more discussion about the "60-Year Curriculum." Predicated on the idea that as human lifespans increase, individuals will need to work beyond age 65, the 60-year curriculum assumes that employees will need regular retraining and "upskilling" throughout careers that span six decades or more. This regular retraining will help workers stay current in their existing jobs and prepare for new workplace roles that will evolve in the future.

For colleges and universities, adjusting to the 60-year curriculum will require considerable cultural change. No longer will the focus be on preparing students for their initial forays into the workplace. Rather, says Chris Dede, a professor at Harvard who is an expert on this trend, "education's role must be long-term capacity building—enhancing students' interpersonal and intrapersonal skills for a lifetime of flexible adaptation and creative innovation—as well as short-term preparation so that they are college- or career-ready."

What's the biggest barrier to adapting to trends like the 60-year curriculum? "Unlearning," according to Dede. Institutions and individual educators "have to let go of deeply held, emotionally valued identities in service of transformational change to a different, more effective set of behaviors."

The ongoing development of new credentials such as badges and certificates and the expansion of online learning can be seen as elements of a gradual shift in thinking that supports the growing need for lifelong education. Some institutions are finding that their continuing education divisions have the nimbleness and spirit of innovation necessary to adopt programs with the 60-year curriculum in mind. But in general, experts believe, more concerted work is needed within colleges and universities to develop, test, and refine approaches to education that can support learners across the 60-year curriculum.⁹

◆ For discussion

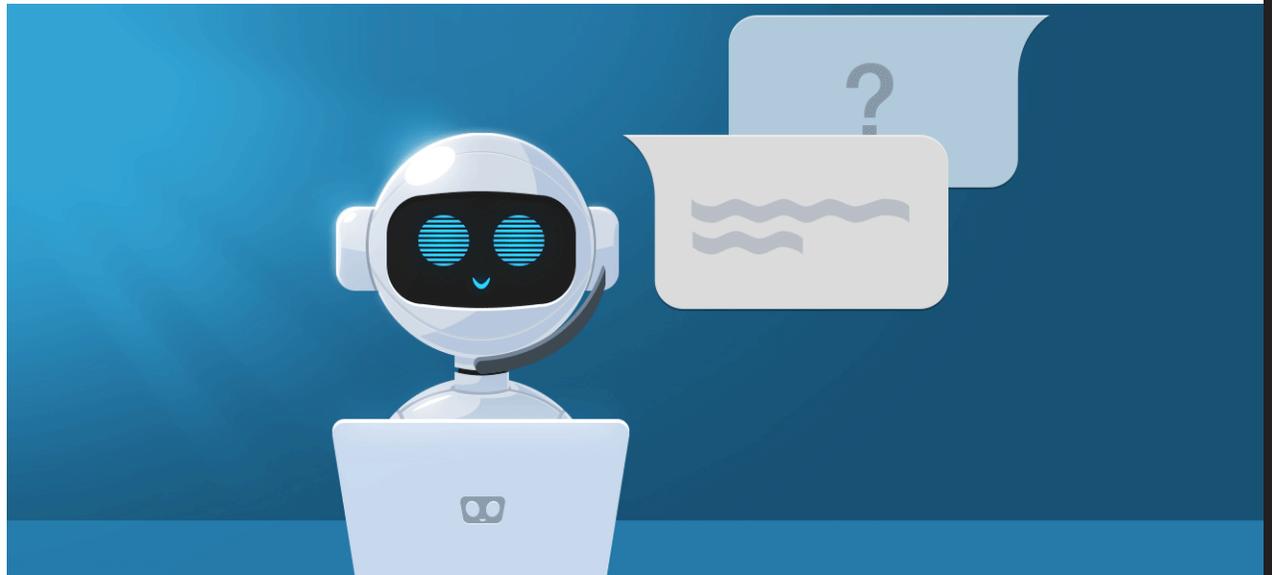
- How does our institution support lifelong learning? How are we helping older learners retrain and upskill?
- What needs would a mid-career learner have? How about a later-career learner? How could we meet those needs?
- What kind of programmatic and process change would our institution need to become a leader in supporting the 60-year curriculum?
- What would our institution need to "unlearn" to support the 60-year curriculum? What values and assumptions do we carry that need to be examined and questioned?



⁹ Chris Dede, "The 60 Year Curriculum: Developing New Educational Models to Serve the Agile Labor Market," *The Evollution*, October 19, 2018, https://evollution.com/revenue-streams/professional_development/the-60-year-curriculum-developing-new-educational-models-to-serve-the-agile-labor-market; and Alina Tugend, "60 Years of Higher Ed — Really?," *The New York Times*, October 10, 2019, www.nytimes.com/2019/10/10/education/learning/60-year-curriculum-higher-education.html.

Technology Trends

Can AI help IT, and how can multiple offices across campus best cooperate to manage data analytics and IoT? How can we train faculty to be experts in online pedagogy? And what's the best role for multilingual chatbots?



Duo-Lingo Chatbot

In September 2019, the technology vendor Ocelot announced a first-of-its-kind, fully bilingual, customizable English-Spanish chatbot. Trained with vocabulary and terminology consistent with US Department of Education Spanish guidelines, the chatbot was designed to help colleges and universities communicate with native Spanish-language speakers, especially parents. That's a timely innovation given that about one in five of today's college students is Hispanic. Ocelot has deployed bilingual versions of its chatbot at more than 40 institutions.¹⁰

◆ For discussion

- How well does our institution help Hispanic learners enroll and stay in college? What services and programs do we provide for those learners?
- How does our institution engage with the parents of Hispanic students, particularly native Spanish speakers? How effectively are we communicating with parents who speak little-to-no English?
- Given that some chatbots can now speak Farsi, Creole, Cantonese, and Mandarin, could our institution benefit from bilingual chatbots fluent in languages other than Spanish?

¹⁰ Ocelot, "Ocelot Launches Bilingual English-Spanish Artificially Intelligent Chatbot for Colleges and Universities" (news release, September 30, 2019), www.prnewswire.com/news-releases/ocelot-launches-bilingual-english-spanish-artificially-intelligent-chatbot-for-colleges-and-universities-300927714.html.

Just Take That Old Interoperable Learning Record Off the Shelf

Looking beyond the traditional transcript, the White House's American Workforce Policy Advisory Board has come out in support of interoperable learning records (ILRs), a tool for employees to combine their education, training, and work experience into a universally recognized record of transferable skills. The board has called for inventorying existing ILRs and for clarifying stakeholders' roles and incentives around ILRs. The board also supports fast-tracking new ILR prototypes.¹¹

◆ For discussion

- How well do employers understand the value behind the credentials that our institution awards? Is there room to clarify that value using ILRs?
- How do we help students document and communicate their knowledge and skills? How are we helping alumni?
- Could a tool like the ILR do a better job than a transcript of capturing the full range of skills that learners gain, both in the classroom and through extracurricular educational opportunities?

¹¹ American Workforce Policy Advisory Board, Data Transparency Working Group White Paper on Interoperable Learning Records, September 2019, www.commerce.gov/sites/default/files/2019-09/ILR_White_Paper_FINAL_EBOOK.pdf.

Look, No One Wants to Live in Minority Report

Given that campus IT, facilities operations, and academic offices often share a stake in the sensors, cameras, tags, and badges that constitute the Internet of Things, deciding who governs those devices is essential. Citing that need as a recent top trend, the research and advisory firm Gartner asserted that “as the IoT continues to expand, the need for a governance framework that ensures appropriate behavior in the creation, storage, use, and deletion of information related to IoT projects will become increasingly important.”¹²

◆ For discussion

- At our institution, are IoT governance policies and practices clearly mapped in a well-thought-through, institution-wide strategy?
- Was the plan developed by key stakeholders across campus?
- Is it clear who is responsible for managing, controlling, and analyzing data derived from the IoT?



¹² Gartner, “Gartner Identifies Top 10 Strategic IoT Technologies and Trends” (press release, November 7, 2018), www.gartner.com/en/newsroom/press-releases/2018-11-07-gartner-identifies-top-10-strategic-iot-technologies-and-trends.

Digital Transformers: Process Optimus Prime

Digital transformation means embracing the power of technology to create smarter business processes. But that's not just IT's domain. Consultant Tony Saldanha, a digital transformation expert, says, "Every business function leader and every business unit leader needs to make and own the choices about how they will digitize their part of the enterprise." Moreover, staff need to see beyond specific tech skills to understand digital technology writ large. A key challenge? Helping staff transition from basic understanding of technology to bolder thinking about its potential.¹³

◆ For discussion

- How often do faculty, administrators, and staff outside of IT adopt new technologies to improve their performance?
- Who has digitally transformed their school, department, or division? Why did they succeed? Can it be replicated in other areas of the institution?
- How can we help more faculty, administrators, and staff across all functional areas use new technologies to improve their performance? What information, training, or supports will they need to do this?

From Plato to Python

In part to help students transition from a liberal arts curriculum to a career in digital technology, Davidson College experimented this past summer with a boot camp on computer coding—not at the liberal arts college's campus in North Carolina but in San Francisco. Going beyond teaching just tech skills, the camp also emphasized learning "soft" skills like public speaking and working in teams. The program also focused intentionally on helping learners understand the variety of jobs they might pursue at software companies, including roles such as project management and user experience design.¹⁴

◆ For discussion

- How well does our institution help students transition from college to the workforce? If students major in a liberal arts discipline, do they need additional career-readiness training or technical skills?
- How do we help students improve soft skills like communicating effectively and working in teams?
- What partnerships could we enter to help liberal arts majors boost their technical skills?



13 Tony Saldanha, "3 Steps to Reskilling in the Digital Era That No Leader Can Afford to Miss," SmartBrief (October 25, 2019), www.smartbrief.com/original/2019/10/3-steps-reskilling-digital-era-no-leader-can-afford-miss.

14 Jeffrey R. Young, "A New College Program Inspired by Coding Bootcamps, Informed by Liberal Arts," EdSurge (October 11, 2019), www.edsurge.com/news/2019-10-11-a-new-college-program-inspired-by-coding-bootcamps-informed-by-liberal-arts.

Online Courses for the Online Teacher

Penn State has moved aggressively to “get faculty who teach online to come back to class . . . as students.” To help faculty and graduate students teach more effectively online, the university’s World Campus Faculty Development unit offers 17 courses and six related certificates. Some of the programming helps faculty understand different online learner populations, such as adults and those in the military. Another emphasis is on career-long professional development, recognizing that faculty need to continually hone their online teaching skills because the related technology is always evolving.¹⁵

◆ For discussion

- To what extent does our faculty professional development focus specifically on online teaching and learning?
- How well do we understand our different online learner populations? How are we helping others understand those learners?
- Given how fast technology evolves, how much ongoing professional development do we need to provide to those who teach online?

AI Monitoring IT

The Boston Consulting Group says emerging tools in AIOps (AI in IT operations) have great potential to enhance how IT staff scan both specific applications and “the broader ecosystem” to better identify security risks and other issues.¹⁶ Dartmouth College, for example, has started using a cloud-based AI product that monitors computers across the institution’s network for breaches like malware. Dartmouth CIO Mitchel Davis told *University Business* magazine that “AI and security go hand in hand.”¹⁷

◆ For discussion

- How could AI help our IT operations?
- How does our IT stay up-to-date on new tools and advancements? Are there barriers to adopting new tools that could improve operations or cybersecurity?
- Looking ahead, what operational tasks might be opportunities for automation? Where else might we use AI?



I Mean, How Did Picard Manage Data?

Universities collect copious amounts of data, but many struggle to use those data to improve business operations and teaching and learning. Experts say effective data analytics requires a robust cross-institutional strategy. A key to that strategy? Engaging multiple stakeholders—including faculty and students—in data governance, planning, and decision-making. Another imperative: broad collaboration across institutional silos. Consistent communication about data analytics can also help campus communities get on board.¹⁸

◆ For discussion

- What is our data analytics strategy? How was it developed? Who was involved? How effectively are we using data to make decisions?
- Does our data analytics governance structure promote or hinder collaboration around data between and among different campus functions?
- How well does our institution articulate and communicate why and how data analytics is important to all campus constituencies?

15 Penn States News, “Online Professional Development: How to Keep Faculty Coming Back for More,” Pennsylvania State University (press release, November 15, 2019), <https://news.psu.edu/story/593153/2019/10/21/academics/online-professional-development-how-keep-faculty-coming-back-more>.

16 Akash Bhatia, Usama Gill, and Remco Mol, “Ready or Not, AI Is Coming to IT Operations,” Boston Consulting Group (August 29, 2019), www.bcg.com/publications/2019/artificial-intelligence-coming-information-technology-operations.aspx.

17 Jodi Helmer, “3 Rules for Using AI Tools in Campus Business Processes,” *University Business*, September 16, 2019, <https://universitybusiness.com/3-rules-for-using-ai-tools-in-campus-business-processes>.

18 Betsy Reinitz, “Keys to an Analytics Future: Governance, Collaboration, and Communication,” *Educause Review*, (September 6, 2019), <https://er.educause.edu/blogs/2019/9/keys-to-an-analytics-future-governance-collaboration-and-communication>.

USS Enterprise photo: https://commons.wikimedia.org/wiki/File:U.S.S._Enterprise_NCC_1701-D.jpg, CC BY-SA (<https://creativecommons.org/licenses/by-sa/4.0/>)



Food for Thought

Is Data Use Privacy Abuse?

Tensions are coming to a head at many campuses over the benefits of mining student data versus individual rights to data privacy. As reported in EdSurge, those strains were very much in evidence at the 2019 EDUCAUSE meeting. While multiple vendors hawked student data analytics solutions and the organization itself was urging colleges and universities to use data tools to recruit students and help them academically, speakers in at least one conference session were warning about downsides in the use of student data, including potential bias against certain student groups and risks for misuse of data.

Those issues are bubbling up as institutions make deeper use of behavioral data to monitor student progress and nudge learners when they get off track. At the same time, more institutions are collecting biometric data by adopting campus security tools that scan fingerprints or use facial recognition software.¹⁹

Another session at the same meeting focused on institutional chief privacy officers. While many colleges and universities rely on IT staff to monitor data privacy as part of their overall portfolio, a growing number of institutions are appointing administrators whose chief function is data privacy. As quoted in *Inside Higher Education*, the privacy officer at a leading research university said “privacy is where security was 10 years ago. I helped our institution build the security office, and now I’m building the privacy office.” Privacy first appeared on EDUCAUSE’s annual list of top issues in 2019, claiming the No. 3 slot. On the 2020 list, it had moved up to No. 2.²⁰

19 Rebecca Koenig, “At Educause, a Push to Monitor Student Data is Met with Concerns About Privacy and Equity,” EdSurge (October 17, 2019), www.edsurge.com/news/2019-10-17-at-educause-a-push-to-monitor-student-data-is-met-with-concerns-about-privacy-and-equity.

20 Lindsay McKenzie, “Prioritizing Privacy,” *Inside Higher Education* (October 18, 2019), www.insidehighered.com/news/2019/10/18/why-colleges-are-prioritizing-privacy.



◆ For discussion

- How does our institution decide what student data to collect and how will the information be used? How transparent are we about those decisions and how they were reached?
- Do our policies adequately protect student privacy?
- How do we monitor the potential for data to perpetuate bias against different student populations, particularly historically marginalized students?
- From IT to academics, are the right stakeholders engaged in the right conversations about the tensions between data analytics and data privacy?



Economic Trends



Competition over sticker price heats up, institutional income looks flat, and the public continues to question the value of college. Meanwhile, adjuncts continue to try to unionize and more institutions weigh the benefits of partnerships.

Adjuncts and Unionization

Nearly three-quarters (73 percent) of instructional positions were off the tenure track in 2016, the latest year for which data are available.²¹ Not surprisingly, we have seen an uptick in efforts by contingent faculty to unionize. That work was struck a significant blow in 2019, however, when a federal court sent a major 2014 decision in favor of adjunct unions at private institutions back to the National Labor Relations Board for review. As reported in *Inside Higher Education*, a union official characterized the ruling as a “setback” but said it was “by no means a death knell for non-tenure-track organizing.”²²

◆ For discussion

- What is the labor landscape among adjunct faculty at our institution?
- To what extent do adjunct faculty compensation, benefits, and working conditions align with our institution’s mission and values? How does their compensation compare to our region’s cost of living?
- How might new adjunct faculty unions impact institutional finances and operations?

21 American Association of University Professors, “Data Snapshot: Contingent Faculty in US Higher Ed,” October 11, 2018, www.aaup.org/news/data-snapshot-contingent-faculty-us-higher-ed.

22 Colleen Flaherty, “Uncertainty for Non-Tenure-Track Unions,” *Inside Higher Education*, March 14, 2019, www.insidehighered.com/news/2019/03/14/federal-appellate-court-decision-could-make-it-harder-adjuncts-form-unions.

Helping Potential Students Compare Costs

It might be a sign that the competition to recruit students is heating up: Consultant Bob Johnson reports that The College of New Jersey, a public institution, has a tool on its undergraduate admissions site where students and parents can directly compare the costs of attending TCNJ specifically with prices for attending 111 other institutions. While college shoppers can always compare prices on their own, Johnson says “direct cost comparisons of any kind are very rare in higher education,” adding that “the TCNJ example is especially unusual in the number of schools included.”²³

◆ For discussion

- In general, is our institution prepared for an era where competition to recruit students is likely to be more aggressive than it once was?
- On dollars alone, in terms of tuition and other costs, how does our institution compare with its peers? Is our institution competitive?
- How are we communicating our institution’s cost and value to potential students who are wary of debt?

23 “Your Higher Education Marketing Link of the Week... The College of New Jersey: ‘Value’ Comparison with 111 Schools” (web posting), Bob Johnson Consulting (October 18, 2019), <http://bobjohnsonconsulting.com/2019/10/your-higher-education-marketing-link-of-the-week-the-college-of-new-jersey-value-comparison-with-111-schools-18-october-2019>; Bob Johnson, email message to author, October 22, 2019.

Bond. Century Bond.

As a refreshing counterpoint to the recent spate of economic challenges that higher education faces, a few institutions have been able to capitalize on favorable conditions in credit markets to float “century” bonds, which mature after 100 years. For the University of Pennsylvania, for example, several favorable trends—including parity between interest rates for short- and long- term borrowing and borrower demand—encouraged it to issue \$300 million in century bonds.²⁴

◆ For discussion

- How could issuing century bonds benefit our institution? What are the risks?
- Even if our institution is not in a position to issue century bonds, is it fully capitalizing on favorable conditions in credit markets?
- In general, could our institution do more to learn about and act on changes in financial markets? What kinds of cultural and process changes might help it react more expeditiously to emerging opportunities?



Student Loans: A “Debt Sentence”?

Researchers at Brandeis University argue that student loans have “turned into a debt sentence” for more and more borrowers. The burden of debt, the researchers say, impedes loan holders from acquiring wealth and jeopardizes their long-term financial security. “The damaging effects of student loans are unmistakable for today’s young adults overall,” the report says, “but the impacts for students of color have been the most devastating, particularly among black borrowers.”²⁵

◆ For discussion

- How do student loans affect our students and alumni? How are students and alumni of color affected? How are black students and alumni affected?
- How could our institution mitigate the impacts of student loan debt, particularly on populations of color?
- What does our institution do now to prevent current and future students from being overwhelmed by student loan debt? How could we improve or expand those efforts?

24 Daniel C. Vock, “With Interest Rates Low, Colleges Get in on 100-Year Debt,” Education Dive (October 29, 2019), www.educationdive.com/news/with-interest-rates-low-colleges-get-in-on-100-year-debt/566012.

25 Laura Sullivan, Tatjana Meschede, Thomas Shapiro, and Fernanda Escobar, “Stalling Dreams: How Student Debt is Disrupting Life Chances and Widening the Racial Wealth Gap,” Institute on Assets and Social Policy, Heller School for Social Policy and Management, Brandeis University (September 2019), <https://heller.brandeis.edu/iasp/pdfs/racial-wealth-equity/racial-wealth-gap/stallingdreams-how-student-debt-is-disrupting-lifechances.pdf>.



Tomorrow's Forecast: More of the Same

As reported in *Education Dive*, financial experts project that colleges and universities can expect continued constrained revenue in the near term. Moody's believes that a "hypercompetitive" market for higher education will help keep tuition rates in check over the next year. Investments, meanwhile, are expected to return a relatively modest 5 to 6 percent in 2019. Moody's believes such conditions may drive more consolidation and belt-tightening at the program or even institutional level.²⁶

◆ For discussion

- Even if appropriations for higher education are on the rebound in our state, how is our institution planning for continued downward pressure on tuition and endowment income?
- To what extent can fundraising, tuition discounts, and borrowing offset financial contingencies at our institution? Are any of those avenues "maxed out" in terms of income they might realize?
- If our institution has already consolidated programs and staff positions, where else could it look for further cost savings?

26 Hallie Busta, "Report: 'Hypercompetitive' Higher Ed Market Will Limit Revenue Growth," *Education Dive* (August 14, 2019), www.educationdive.com/news/report-hypercompetitive-higher-ed-market-will-limit-revenue-growth/560924.

Partnerships as Relationships

As more institutions engage in more partnerships, lessons are emerging about managing those relationships. One expert says any institution considering working with an external vendor should first ask, "What are our margins for each student and program, and how much risk can we take?" Second, the institution should weigh its internal capabilities against those of the prospective vendor. Third, look beyond short-term gains and consider how a partnership with a vendor can factor into the institution's long-term strategy and goals.²⁷



DEEPER DIVE:

Guidelines for Town-and-Gown Partnerships. Years of experience in building relationships between universities and their local communities has led Wim Wiewel, the president of Lewis & Clark College, to frame some relevant guidelines. Successful partnerships must be mutually beneficial, he says, and can take a long time to build. Often, partners will learn what they need to do only after starting to work with one another. Successful, sustainable town-and-gown partnerships must have campus buy-in, support, and visibility, Wiewel says, as well as quantitative and qualitative methods for measuring impact.²⁸

◆ For discussion

- When considering partnerships, how does our institution determine what capabilities should be developed internally that should be outsourced?
- In partnering, how does our institution look beyond the promise of short-term gains to fully weigh the implications of working long term with a vendor?
- How does our institution measure the impact of its partnerships, particularly in the community? How do we communicate that impact to stakeholders?

27 Benjamin Roberts, "Ask These 3 Questions to Evaluate Graduate and Online Growth Partners," EAB (blog posting, October 29, 2019), <https://eab.com/insights/blogs/adult-learner/questions-evaluate-graduate-online-partners>.

28 Wim Wiewel, "Your City (or Town) is More Than a Place to Call Home," *president2president* (October 30, 2019), www.president2president.com/library/2019-2020_ch3.

When It Comes to Value, Relevance Is Key

The Strada Education Network partnered with Gallup to poll individuals about how they value their education. One key finding: “Individuals are more likely to strongly agree that their education is worth the cost and that it makes them an attractive job candidate when they can most clearly connect their education to their work.” The report also found that relevant courses, not wages “have the strongest link to how consumers assess the value of their education experience.”²⁹

◆ For discussion

- How do we communicate the value of an education from our institution? How can those findings help us improve that communication?
- What do our graduates tell us about their education experiences? What do they find valuable?
- How are we drawing explicit links between what is taught in the classroom and what the graduate is able to do in their work?



29 Strada Education Network and Gallup, “Changing the Value Equation in Higher Education,” 2019, www.stradaeducation.org/report/changing-the-value-equation-for-higher-education.



Two Economies, One Institution

Given that a third of all college learners now take at least one course online, one expert argues that institutions of higher education are developing something of a split personality, with place-based and residential education on one side and online on the other. That split is not just between types of students or delivery modalities; the economics of online are appreciably different—starting with tuition but also including differences in requisite facilities, supporting infrastructures, and the relative costs of course design and delivery.³⁰

◆ For discussion

- How do online education’s operational needs differ from our in-person programs, even in areas that seem shared, like advising or admissions?
- Do our online programs have the resources they need to be successful?
- For online education, do we use the same resource allocation frameworks that we apply to conventional education? Do we need to intentionally evolve a separate set of practices and policies for online education?

30 Robert Ubell, “Higher Ed Has Now Split into Dual Economies: Online and Traditional,” EdSurge (November 6, 2019), www.edsurge.com/news/2019-11-06-higher-ed-has-now-split-into-dual-economies-online-and-traditional.



Food for Thought



Demographic Cliffs Notes

Expanding recently on arguments he made in his provocative book *Demographics and the Demand for Higher Education*, Nathan Grawe says the demographic cliff—the fast-approaching dearth of adolescents in the United States—will have multiple effects on colleges and universities. Given that the total US fertility rate has fallen by almost 20 percent since the Great Recession, two-year and non-selective four-year institutions may particularly struggle with enrollments. Fighting to find students, more institutions will recruit in new markets and “international recruitment may heat up,” Grawe believes. Higher education may also see “intensified price competition,” he postulates, and institutions are also likely to be more aggressive in retaining students they enroll.³¹

The demographic cliff may also have a negative effect on university partnerships with private developers to build campus housing (P3s). One analyst suggested that while student-rich areas such as Boston might not be affected, schools in areas like the Midwest, where the student population is thinning, may find companies reluctant to invest in a partnership on new facilities.³²

Meanwhile, a glimmer of better—and perhaps contrarian—news has emerged. While bracing for a widely predicted downturn in the numbers of potential colleges students, some institutions in New England were surprised by relevant data. Recent research shows that Maine and Rhode Island experienced less-than-projected dips in the numbers of high school graduates, while Connecticut and Massachusetts actually saw net gains. Why that discrepancy? Researchers believe one factor is improvement in K–12 outcomes. In Massachusetts, for example, a 7 percent increase in high school graduation rates helped offset a 2.5 percent decline in the cohort of graduation-eligible students. Better graduation rates also helped other states beat projections.³³ It is unclear, however, whether such upticks in numbers will be adequate to offset expected declines in the student population over time.

◆ For discussion

- Given our institution’s location and our current student population, how will the demographic cliff impact our institution?
- How is the demographic cliff influencing our institution’s planning—in particular, enrollment, resources, and master planning?
- What sources of revenue and investment, including partnerships and enrollment of international students, could be affected by the demographic cliff?
- What could we do now in our community to mitigate enrollment declines from the demographic cliff? For example, could we develop or expand on partnerships with K–12 education?

31 Nathan Grawe, “Americans Are Having Fewer Kids. What Will That Mean for Higher Education?”, Harvard Business Review (October 17, 2019), <https://hbr.org/2019/10/americans-are-having-fewer-kids-what-will-that-mean-for-higher-education>.

32 Joe Bousquin, “Is Student Housing’s Party Over?”, EducationDive (November 6, 2019), www.educationdive.com/news/is-student-housings-party-over/566727.

33 Richard Garrett, “High School Graduates: New England Challenges Conventional Wisdom,” NRCCUA (November 12, 2019), <https://encoura.org/high-school-graduates-new-england-challenges-conventional-wisdom>.

Environmental Trends

As institutional finances contract, is it time to also think about shrinking the physical plant? How can we plan strategically to maintain the campuses we have now? And if global warming persists, will some institutions need to move to higher ground?

Shrinking the Footprint

Following decades of campus growth, some institutions are thinking about downsizing. In an accreditation self-study, for example, the University of Alaska Fairbanks talks about the strategic value of “reduc[ing] expenses first by shrinking our facilities footprint” and notes five campus houses targeted for demolition.³⁴ A planning document from Oberlin College says that in-house analyses and outside experts have found that the college’s “overall footprint is significantly larger than it needs to be to achieve its mission” and suggests shrinking the institution’s physical footprint by roughly 20 percent.³⁵ Comparing higher education to overbuilding in retail stores, *Forbes* contributor Michael Horn recently wrote that “As in retail, the future of higher education will likely have an important brick-and-mortar component, but one significantly slimmed down from today’s girth.”³⁶

◆ For discussion

- How much space do we need to meet the needs of our institution today? In five years? Ten?
- Given decreased capital budgets, how much space can we actually maintain?
- How will changes in higher education—including growing online enrollment and the demographic cliff—impact the types and amounts of space we need?



34 University of Alaska Fairbanks, Comprehensive Self-Evaluation Report, August 2019, <https://uaf.edu/accreditation/files/2019-review/UAFSelf-EvaluationReport2019.pdf>.

35 Oberlin College, One Oberlin: The Academic & Administrative Program Review [AAPR] Final Report, May 10, 2019, www.oberlin.edu/sites/default/files/content/about-oberlin/aapr/aapr_final_report.pdf.

36 Michael Horn, “Colleges and Retailers Share a Bloated Past and a Slimmed Down Future,” *Forbes*, October 13, 2019, www.forbes.com/sites/michaelhorn/2019/10/03/colleges-and-retailers-share-a-bloated-past-and-a-slimmed-down-future/#2d0b626c5038.

Fixing Maintenance Decisions

As part of a study framing a strategy for planning, prioritizing, and communicating maintenance decisions, the consulting firm EAB cited numerous criteria that one institution, Western Illinois University, includes in a matrix to help it make choices about facilities upkeep. In addition to factors such as how much students and faculty use a building—and how much they *need* such space—the tool helps WIU also weigh things like safety concerns, ADA compliance, and potential funding for renovations. A Facilities Condition Assessment speaks to the scope, costs, and necessity of deferred maintenance concerns. Each metric is measured by relative strategic importance.³⁷

◆ For discussion

- How does our institution prioritize facilities maintenance needs?
- How useful is our current facilities assessments? Do we use the data in maintenance and planning decisions?
- Could or should we adopt a more methodological approach, such as WIU's matrix, to make decisions about facilities maintenance, repair, and renovation?

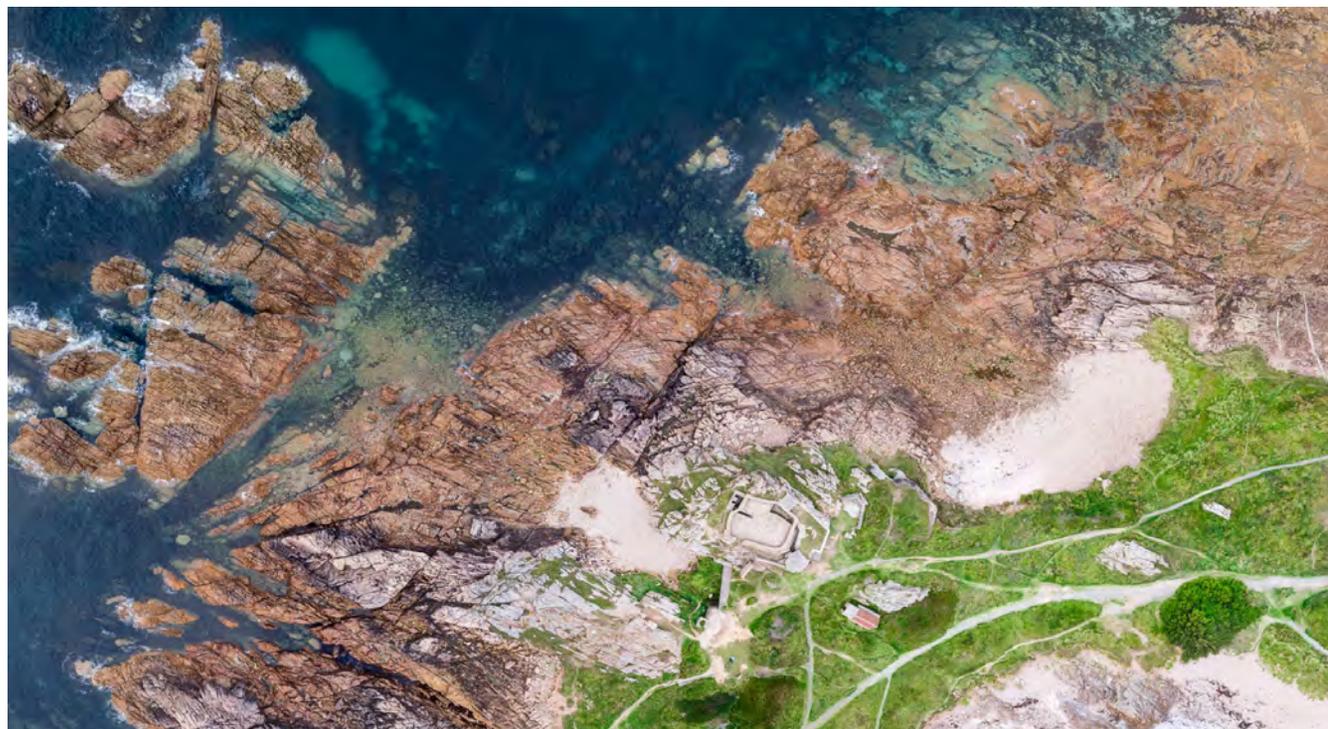
37 EAB, "10 Criteria to Consider in Deferred Maintenance Decisions," Insights/Daily Briefing, November 17, 2019, <https://eab.com/insights/daily-briefing/facilities/10-criteria-to-consider-in-deferred-maintenance-decisions>.

Will Campuses Seek the High Ground?

In a series of blog postings, futurist Bryan Alexander asks critical questions about how higher education will ultimately respond to climate change. One provocative observation: Rising sea levels at both coasts in North America may drive institutions in threatened areas to "consider relocating inland and/or upwards and/or north." As temperatures and sea levels rise, Alexander says "certain [geographic] areas may become untenable" for campuses, including coastlines and zones prone to increasing heat.³⁸

◆ For discussion

- How could climate change affect your campus's buildings, landscape, and infrastructure? What are your institution's biggest climate change threats?
- How does climate change factor into your master plan? Does your institution have a resiliency plan?
- How could climate change alter our community? Could rising sea levels, extended drought, wild fires, rising temperatures, and/or increasingly severe storms displace enough people to affect our institution's ability to recruit students and attract faculty and staff?



38 Bryan Alexander, "How Will Higher Education Respond to Climate Change? Part 2," Bryan Alexander Website (October 15, 2019), <https://bryanalexander.org/climatechange/how-will-higher-education-respond-to-climate-change-part-2>.

Buildings That Restore Ecosystems

As Georgia Tech embraced principles of sustainable campus development, architect Howard Wertheimer says it began to ask how new buildings could do more to improve the environment than detract from it. One product of that regenerative design thinking, the Kendeda Building, was designed to help to restore a functioning ecosystem and the watershed that feeds it, Wertheimer reports. The building was designed to be net positive in terms of clean energy, water, and “in the balance between materials that we diverted from the landfill and those that went to landfill.”³⁹

◆ For discussion

- How do our buildings affect their environment? How can our buildings improve their environment?
- How could our institution incorporate principles of regenerative design in future building and renovation projects?
- How do we calculate the long-term effects of our built environment on our campus’s watershed?

Your Supply Chain Has a Footprint

Many colleges and universities account only for their direct operational carbon footprint and don’t factor in “the embodied carbon hidden within the materials and goods procured throughout their supply chain,” says a recent white paper. Often, too, they let too much of their largest purchase of plastic—flooring—find its way to local landfills. “By acknowledging and addressing the embodied carbon within a university’s portfolio of purchased products,” the paper suggests, institutions can create a carbon-neutral supply chain.⁴⁰

◆ For discussion

- How do our purchasing decisions influence our carbon footprint measurements? Is it something we include?
- What changes in institutional practices and policies might help our institution account for both “operational” and “embodied” carbon?
- What more could our institution do to help create a carbon-neutral supply chain?

39 Howard Wertheimer, “Regenerative Design Confronts Higher Ed with Hard Questions,” *Kendeda Living Building Chronicle* (October 28, 2019), <https://livingbuilding.kendedafund.org/2019/10/28/regenerative-design-confronts-higher-ed-with-hard-questions>.

40 Interface, Inc. “The Circular Economy Beneath Your Feet” (undated), http://interfaceinc.scene7.com/is/content/InterfaceInc/Interface/Americas/WebsiteContentAssets/Documents/Whitepapers/HigherEd-Sustainability/wc_am-educationsustainabilitywhitepaper.pdf.



Designing New Library Services

The research and consulting service Ithaka S+R has developed an evidence-based approach for designing new library services. The methodology, dubbed “service concept testing,” starts with a discovery phase to learn the “expressed needs of a target community.” The next phase includes brainstorming service ideas that address those needs. The final phase focuses on evaluating those services to determine their value to users.⁴¹

◆ For discussion

- How do our libraries design their services to address the needs of their users?
- How do we measure the value of the services our libraries provide?
- How could we use service concept testing beyond libraries to help guide development of new services?

41 Christine Wolff-Eisenberg and Roger Schonfeld, “What Do Our Users Need?: An Evidence-Based Approach for Designing New Services.” *Ithaka S+R*, Last Modified 6 November 2019, <https://doi.org/10.18665/sr.312092>.

Shared Space at Shady Grove

The Universities at Shady Grove (USG), a regional campus of the University System of Maryland that offers 80 degree programs from nine public universities, recently doubled its physical footprint by opening a 220,000-square-foot, \$175 million building dedicated to engineering and the biomedical sciences. Distinctive nationwide by the number of partners it includes and programs it offers, USG plans over the next several years to expand its student body from around 3,000 students now to more than 7,500 learners.⁴²

◆ For discussion

- In an era when few institutions can be all things to all learners, how could our institution partner with other colleges and universities in our region or state system?
- How could we share lab space and other expensive infrastructure with other institutions?
- Does a campus need to be tied to one institution? How could shared campuses become more common, particularly as online learning allows instruction to happen almost anywhere?

Hold the Allergens, Please

According to one report, nearly half of college students today avoid at least one food allergen.⁴³ It's perhaps not surprising, then, that a recent trend in campus dining is toward allergen-free dining halls. The University at Buffalo, Michigan State University, Tufts University, and the University of Texas at Denton are among institutions that have recently opened such facilities.⁴⁴ While important from health and inclusivity considerations, such options also distinguish campuses as learners search for colleges to attend—and check websites that rank campus dining.

◆ For discussion

- How well do our food services understand students' evolving dining preferences, such as increased demand for vegan and allergen-free options? How well do they serve those preferences?
- How do we currently accommodate those students with food allergies? What are the benefits of our current accommodations? Drawbacks?
- How do we assess student dining preferences and measure our performance?

⁴² Universities at Shady Grove, "The Universities at Shady Grove Celebrates Grand Opening of Biomedical Sciences and Engineering Building" (press release, November 7, 2019), www.businesswire.com/news/home/20191107006004/en/Universities-Shady-Grove-Celebrates-Grand-Opening-Biomedical.

⁴³ Jaclyn Marks, "Campus Dining Isn't What It Used to Be," Smart Brief (August 21, 2019), www.smartbrief.com/original/2019/08/campus-dining-isn't-what-it-used-to-be.

⁴⁴ David J. Hill, "Campus Dining and Shops Sizzles with New Selections," UBNOW (October 28, 2019), www.buffalo.edu/ubnow/stories/2019/10/pleasing-palates.html. Haley Hansen, "Michigan State University to Open Allergy-Free Dining Hall," Lansing State Journal (June 27, 2019), www.lansingstatejournal.com/story/news/2019/06/27/michigan-state-university-msu-allergy-free-dining-hall-cafeteria-thrive/1563909001. Carolina Espinal, "Tufts Dining Introduces New Platform Free of Top Allergens," Tufts Daily (November 22, 2019), <https://tuftsdaily.com/news/2019/11/22/tufts-dining-introduces-new-platform-free-top-allergens>. Teresa Gubbins, "UNT in Denton Adds Innovative New Dining Hall That's Totally Allergen-Free," Culture Map Dallas (November 18, 2019), <http://dallas.culturemap.com/news/restaurants-bars/11-18-19-unt-vegan-gluten-allergen-free-cafeteria-denton>.



Food for Thought

Beyond Dollars: Four KPIs for Planning Learning Spaces

While enhancing student success may be the end goal of most new or renovated learning spaces, the key performance indicators for such projects tend to be financial in nature. In light of that reality, the facilities firm Sightlines says that it is important to intentionally “broaden KPIs beyond the financial realm.”

The company suggests setting up metrics to assess critical learner-focused questions that are often discussed during planning for instructional facilities, but often not measured afterward. One such question might simply be “How many students will be impacted?” Suggesting how that question can be framed as a predictive measure, Sightlines says strong space utilization analysis will inform planners how many students use a classroom on a daily basis [and] thus “benefit from a project in that space.” Further, tracking classroom usage year by year can show how well a project improved use of a given space, yielding insights that can inform future projects.

There’s another important benefit: Apart from enhancing planning, data from such inquiries can give planners objective information that can help them “cut through subjective opinions or institutional politics,” Sightlines notes.⁴⁵

⁴⁵ Sightlines, “Space Utilization: The 4 Indicators That Will Lead to Smarter Investments,” September 20, 2019, www.sightlines.com/blog/space-utilization-the-4-indicators-that-will-lead-to-smarter-investments.



◆ For discussion

- What metrics do we use to gauge the effectiveness of our learning spaces?
- How do we determine and document goals for learning spaces during the planning and design process?
- How could we use learning space data to communicate to decision makers the need for environments that can accommodate new learning modalities and technologies?

Political Trends

Changes in federal policy have a huge impact on institutional enrollment practices and student athletes. In the states, lawmakers continue to review legislation related to firearms on campus and may be working to curtail students voting where they study. Meanwhile, important issues affecting higher education are winding their way through the courts.

Students at the Ballot Box

A recent analysis by the *New York Times* looked broadly at trends in student voting in public elections. On the one hand, the report said, student voters are energized. More than twice as many students voted in the 2018 midterm elections as did in 2014. The report suggested that students are considered “a potentially crucial voting bloc” in the 2020 election. Meanwhile, legislators in numerous states have sought to bar students from voting where they study. Why? Motivations are fuzzy: Republicans are leading efforts to curtail student voting and most students identify as Democrats (45 percent) or Independents (29 percent).⁴⁶

◆ For discussion

- From a logistical standpoint, how does voting impact our institution?
Are campus facilities used for voting? What are the implications of that?
- Given that part of the academic mission is to engage students as citizens, how can our institution support student voting?
- How should our institution respond to political efforts to curtail student voting?

Is Free Speech a Free-for-All?

How should higher education manage free speech? Some state lawmakers have taken the reins: At least 17 states have passed free speech legislation in the last couple of years. Higher education advocates like the American Council of Trustees and Alumni would leave free speech policies to university trustees.⁴⁷ Michael Roth, the president of Wesleyan University, argues that “free speech wars miss the point.” He suggests that institutional leaders and faculty “need to go beyond a defense of the First Amendment to bring a wide range of ideas to their campuses.” Saying “there is no formula or litmus test for this,” Roth asserts that “it’s our job as educators to curate environments of productive heterodoxy,” in which students can learn from one another “how to understand the logic of viewpoints different from their own.”⁴⁸

◆ For discussion

- What are our institutional policies concerning free speech? Have those policies been functional as guides for practices on campuses?
- How do we encourage dialogue of different ideas? Is that dialogue productive for students?
- How do we allow multiple viewpoints on campus without encouraging disinformation or condoning hateful speech?



46 Michael Wines, “The Student Vote Is Surging. So Are Efforts to Suppress It,” *The New York Times*, October 24, 2019, www.nytimes.com/2019/10/24/us/voting-college-suppression.html.

47 Jeremy Bauer-Wolf, “Free Speech Laws Mushroom in Wake of Campus Protests,” *Inside Higher Education*, September 16, 2019, www.insidehighered.com/news/2019/09/16/states-passing-laws-protect-college-students-free-speech.

48 Michael S. Roth, “Free Speech Wars Miss the Point of College” [opinion], *CNN*, September 10, 2019, www.cnn.com/2019/09/10/opinions/free-speech-on-campus-roth/index.html.

Legislating Guns on Campus

Currently, 22 states ban possession of firearms at postsecondary institutions, while eight states allow individuals to carry concealed firearms on campus. Tracking legislation in state houses, the Education Commission of the States found that at least 47 bills related to guns on campus were introduced in 2019, up from 34 bills in 2018.⁴⁹ Among four related bills that were enacted in 2019, Iowa's governor signed a bill allowing stun guns on college campuses,⁵⁰ while New York passed a law limiting the ability of educational institutions to authorize possession of a weapon on school grounds.⁵¹

◆ For discussion

- When did our campus last assess its policies related to guns on campus? Is it time for another review?
- What are legislative trends in our state regarding guns on campus?
- Can or should our institution be more involved in influencing legislation related to guns on campus?

49 Ben Erwin, "Policies Addressing Guns on Campus," Education Commission of the States (August 2019), www.ecs.org/wp-content/uploads/Policies-Addressing-Guns-on-Campus.pdf.

50 Kaitlyn DeHaven, "New Law allows Stun Guns on Iowa Public University and Community College Campuses," Campus Security & Life Safety (July 03, 2019), <https://campuslifesecurity.com/articles/2019/07/03/new-law-allows-stun-guns-on-iowa-public-university-and-community-college-campuses.aspx>.

51 New York State Senate, "Senate Bill S101A," www.nysenate.gov/legislation/bills/2019/s101.

Admitting Things Will Change

College admissions practices saw big changes in 2019. Prodded by a US Department of Justice investigation of whether its code of ethics violated federal antitrust laws, the National Association for College Admission Counseling (NACAC) reversed three long-standing policies, opening the door for colleges to compete for students more aggressively.⁵² And responding to the "Varsity Blues" college recruitment scandal, national and state lawmakers introduced admissions-related legislation, including the federal "College Admissions Fairness Act."⁵³



Deeper Dive:

Implications of new NACAC policies. A report about the American Marketing Association's 2019 Higher Education Symposium suggests that the new NACAC policies will mean that many colleges and universities will need to "nurture committed students long past the May 1st deposit deadline" and continue marketing to them until the fall semester begins. Institutions will need strategies to keep committed students on board as they (potentially) weigh other offers, and will likely have to draw more learners from their wait lists. More students may be enticed to transfer.⁵⁴

◆ For discussion

- How was our institution affected by issues that came to the fore in the "Varsity Blues" scandal? What steps has our institution taken to address any related potential weak spots?
- How might NACAC's changes in its ethics regulations affect recruitment practices at our institution? How might those changes affect the competitive landscape we work within to find and enroll students?
- How will changes in policy at the state and national level affect our practices for recruiting students? Could and should our institution be more actively engaged in shaping those policies?

52 Kristen Moon, "Three Big Changes Affecting College Admissions That All High School Students and Parents Need to Know About," *Forbes* (November 14, 2019), www.forbes.com/sites/kristenmoon/2019/11/14/three-big-changes-affecting-college-admissions-that-all-high-school-students-and-parents-need-to-know-about/#7e7abb446769.

53 Stefanie Niles and David Hawkins, "The Long-Term Implications of the 'Varsity Blues' Scandal," National Association for College Admission Counseling (undated presentation), www.nacacnet.org/globalassets/documents/professional-development/guiding-the-way-to-inclusion/2019-presentations/plenary-2-varsity-blues.pdf.

54 Clare Hall, Joan Durand, and Megan Youngblood, "5 Key Takeaways: AMA Higher Ed Symposium," *Zehno* (December 19, 2019), <https://zehno.com/5-key-takeaways-2019-ama-higher-ed-symposium>.



California: Fair Pay is a Fair Play for Athletes



Following California's enactment in 2019 of the Fair Pay to Play Act, which will allow collegiate athletes to make money from endorsements starting in 2023, as many as 20 other states are clamoring to pass similar legislation. The reason? Competition. Other states want to ensure that their colleges and universities will be able to compete for athletes seeking paid endorsements. The National Collegiate Athletic Association, which recently voted to start to ease restrictions on college athletes' ability to earn endorsement revenues, has started lobbying Congress to pass federal legislation that might help avoid complications that could arise from having multiple state laws for compensating student athletes.⁵⁵

◆ For discussion

- How might changes in state and NCAA policies affect athletics at our institution, including our ability to recruit student athletes competitively? For us, what are the potential upsides of this trend? Downsides?
- In the wake of those changes, what new policies might our institution need? For example, how do we preserve the distinctions between student athletes and university employees?
- Do we have a responsibility to help our athletes manage their newfound ability to earn endorsements?

55 Lauren Camera, "NCAA to Congress on Pay-to-Play Laws: 'We Need Your Help Right Now,'" US News (December 17, 2019), www.usnews.com/news/education-news/articles/2019-12-17/ncaa-to-congress-on-pay-to-play-laws-we-need-your-help-right-now.

More Four-Year Degrees at Two-Year Schools

Adding another competitive wrinkle for universities, some 23 states now allow their community colleges to offer four-year degrees.⁵⁶ Most of those four-year degrees are specialized programs serving local workforce needs, but in some cases they duplicate university programs (at lower tuition rates) and thus attract students who might otherwise attend nearby four-year institutions. One example: A program on drone management at Ohio's Sinclair Community College is somewhat similar to one offered at nearby Youngstown State University, but it costs half as much to attend.⁵⁷



Deeper Dive:

Two-year degrees at four-year institutions. As something of a counterpoint to the above trend, four-year institutions in Georgia have begun to offer new "nexus" degrees—60-credit programs, designed with help from employers in the state, that mix general education with training for specific jobs like working with blockchain technology or film production. Described as being akin to an associate degree, nexus credentials can be "stacked" as part of more advanced degrees, and may include specific industry certifications.⁵⁸

◆ For discussion

- Have local institutions recently expanded their degree offerings? How has that affected our institution?
- Are we looking to expand our degree offerings beyond what we traditionally have offered? How might that impact student services, facilities, enrollment, etc.?
- How could we provide stackable credentials to students? Are there ways we could modularize our degrees to make them more accessible to students?

56 Maria Claudia Soler, "Updating the National Landscape: State Adoption of Community College Baccalaureate Degrees," Community College Research Initiatives, University of Washington (November 2019), www.washington.edu/ccri/2019/11/18/datanote3-ccb.

57 Elaine S. Povich, "More Community Colleges Are Offering Bachelor's Degrees — and Four-Year Universities Aren't Happy About It," Pew Charitable Trusts (April 26, 2018), www.pewtrusts.org/en/research-and-analysis/blogs/stateline/2018/04/26/more-community-colleges-are-offering-bachelors-degrees.

58 Madeline St. Amour, "Nexus Degrees in Georgia," Inside Higher Education (December 4, 2019), www.insidehighered.com/news/2019/12/04/georgias-public-colleges-soon-will-be-offering-new-form-two-year-degree.

Upcoming Court Decisions

A number of important lawsuits that could affect higher education policy are winding their way through the legal system. In a case that seems destined for the Supreme Court, the lower courts continue to weigh the fairness of affirmative action practices at Harvard and other institutions. Separately, several cases center on Greek life, including an examination of hazing in fraternities. Title IX is another focus of litigation, including cases concerning how institutions treat those accused of sexual assault. Additionally, court decisions on immigration and free speech may also influence higher education.⁵⁹

◆ For discussion

- How could those issues being weighed through litigation at the national level affect our institutional policies and practices?
- What are some of the particular and perhaps unique legal liabilities that our institution faces? Can we do more to protect our institution from those challenges?
- As court rulings come down, are we prepared to respond appropriately and make necessary changes?



59 Natalie Schwartz, "These Lawsuits Could Change the Stakes for Higher Ed," Education Dive (November 15, 2019), www.educationdive.com/news/higher-ed-lawsuits-tracker/561371.

Rather Taxing Work

A Congressional spending package passed at the end of 2019 changed some tax issues in favor of higher education. That legislation fixed a so-called "kiddie tax," introduced in the 2017 Tax Cuts and Jobs Act (TCJA), that had meant sharply increased taxes for many low- and middle-income students on scholarships. Congress also repealed a tax on higher-cost employer health insurance plans due to start in 2022 as well as a planned 21-percent tax on employee parking benefits that would have affected many colleges and universities.⁶⁰



Deeper Dive:

Endowment Tax Still on the Table. As of late 2019, federal officials had yet to clarify exactly how a new 1.4 percent excise tax on net investment income at private institutions, enacted as part of the TCJA, would affect higher education. In June 2019, the IRS said about 40 institutions might have to pay the new tax, but noted that figure might be low. In late 2019, colleges and universities were awaiting specific guidance to see how the new tax might affect them—and efforts were under way to try to repeal it.⁶¹

◆ For discussion

- How have recent changes in federal tax policy affected our institution? How are such changes likely to affect us in the future?
- Could new taxes like the 1.4 percent assessment on investment income open the door to future legislation that might alter our institution's tax-exempt status? Could and should we be doing more to ensure that future legislation does not negatively impact our institution's tax status?

60 American Council on Education, "Congress Fixes 'Kiddie Tax' Mistake, Approves Other Higher Education Tax Provisions," December 20, 2019, www.acenet.edu/News-Room/Pages/Congress-Fixes-Kiddie-Tax-Mistake-Approves-Other-Higher-Education-Tax-Provisions.aspx.

61 Lynne Marek, "Universities Are Smarting Over This New Tax," Crain's Chicago Business (December 6, 2019), www.chicagobusiness.com/education/universities-are-smarting-over-new-tax.

A Closer Look

States Giving More Directions, Fewer Dollars

In the complex relationship between institutions of higher learning and the states where they are based, one trend is that some governors are moving more aggressively to connect education and the workforce through policy. Important to note, one recent blog post suggested that “governors don’t think about K–12 and postsecondary education as separate spaces; rather, their proposals often intertwine and align elements of both education systems.”

State leaders are particularly interested in career and technical education, postsecondary technical education, computer science, STEM education, and access to community colleges. Connecticut’s governor, for example, has appointed a “workforce council,” with representatives from government, business, K–16 education, and nonprofits, tasked with assessing the state of education in Connecticut and creating new initiatives “to close credential and skills gaps.” An initiative called Future Ready Iowa seeks to help all Iowans get employment-related education. Lawmakers in that state approved \$16 million in new funding for postsecondary scholarships and grants to help students who left college without a degree to re-engage with higher education.⁶²

Such programs arise, however, in a context for state funding of higher education that has changed significantly over the last decade. Many states reduced appropriations for colleges and universities after the Great Recession that started in late 2007. And while funding has recovered somewhat since then, in fiscal 2018 state financial support for higher education overall was still 13 percent off its previous peak level. Tallying appropriations for state institutions, student financial aid, and research support that year, 40 states reported lower per-student funding.⁶³

62 Jon Alfuth, “Governors Leading the Way to Career Readiness,” Education Commission of the States (December 12, 2019), <https://ednote.ecs.org/governors-leading-the-way-to-career-readiness>.

63 Pew Charitable Trusts, “‘Lost Decade’ Casts a Post-Recession Shadow on State Finances,” June 4, 2019, www.pewtrusts.org/en/research-and-analysis/issue-briefs/2019/06/lost-decade-casts-a-post-recession-shadow-on-state-finances.

A related broader trend is that the decrease in state funding has meant that students now pay a greater percentage of tuition costs. Tracking the trend from the start of the Great Recession, the State Higher Education Executive Officers Association (SHEEO) found that the amount that students were expected to pay for tuition increased from 35.8 percent in 2008 to “an all-time high” of 47.7 percent in 2013. That figure decreased (slightly) to 46.6 percent in 2018. Noting that “the student share increases most rapidly during periods of economic recession,” however, SHEEO projected that the student share “will likely pass 50 percent during the next recession.”⁶⁴



◆ For discussion

- How well are our institution’s programs aligned with state interests? How do we communicate that to stakeholders, including the community and government officials?
- Do we understand the goals of the governor and legislators, and are we sufficiently responsive to them?
- Have we been honest in budgeting for state appropriations that have been in flux over the last 10 years?
- How can we make the case for higher education funding in an era when we compete for state funding with many other priorities?
- How have we made connections between the student debt crisis and decreased public funding? How can we make the case of education as public good, not private benefit?

64 State Higher Education Executive Officers Association, State Higher Education Finance: FY 2018 (2019), https://sheeomain.wpengine.com/wp-content/uploads/2019/04/SHEEO_SHEF_FY18_Report.pdf.

One More Thing

Framing the Future

We have recently seen a flurry of published prognoses about the future of higher education. Each of those perspectives provides a different bit of food for thought about the future of our institutions.

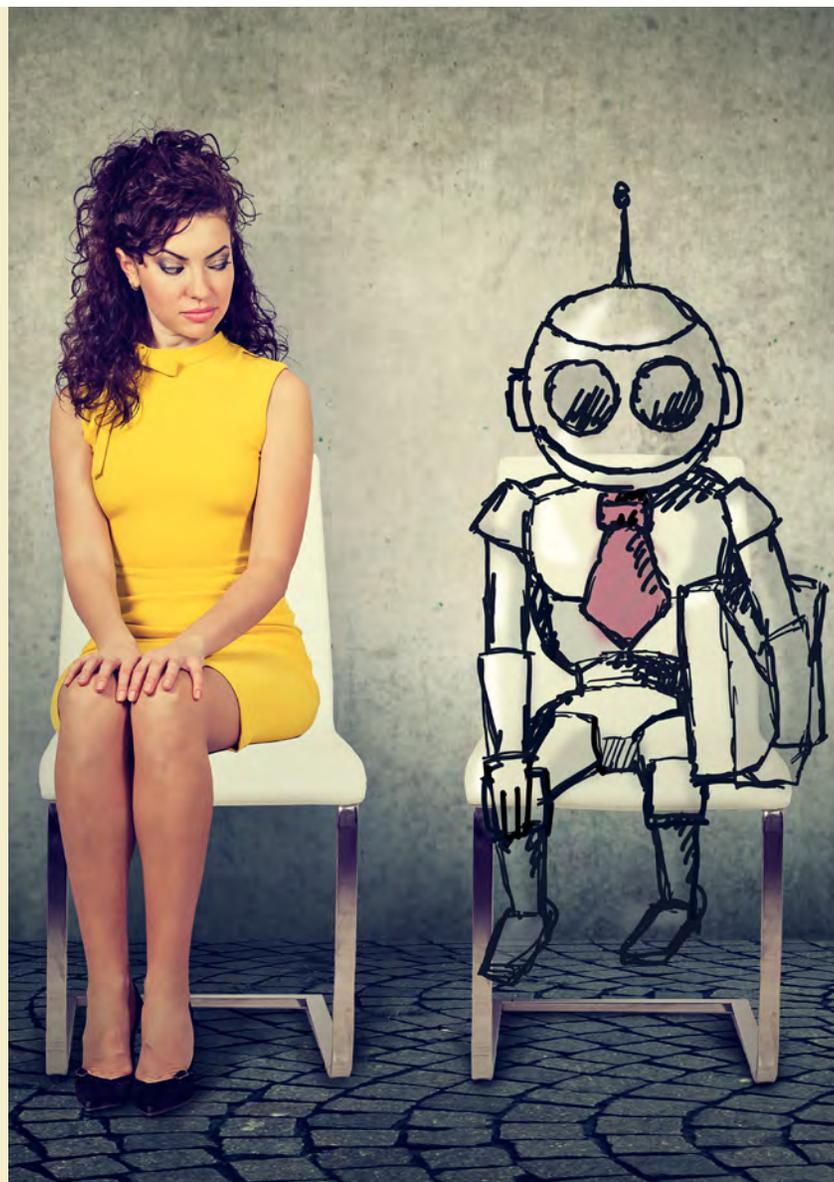
The blog “Observations,” published by *Scientific American*, suggested that “the future of work is the future of higher education,” and argued that “we must end the false dichotomy between scholarship and career.” Further, the post said, we need to recognize higher education not just as a one-time investment in career skills but as a way to “give us the wherewithal to constantly refill our own toolboxes with a personal agency born of genuine motivation and the lifelong learning capacities required by the work of tomorrow.”⁶⁵

Looking at the future of higher education through several lenses, a group of experts convened by Wiley suggested that students will increasingly want institutions to “function like businesses, demanding convenience, personalization, and quality.” Expecting learning to be “entertaining, immersive, purpose-driven, and experiential,” college students will continue to focus more definitively on gaining concrete skills that will make them employable and “facilitate career mobility.” For faculty, team teaching and co-teaching will become more commonplace, and the practice of pedagogy will likely be more interdisciplinary. Faculty will need to be even more technologically savvy. Institutions will need to accommodate more competency-based education, increasingly blurred lines between modalities like online and face-to-face learning, and the expansion of shorter, more compact courses.⁶⁶

Continued on page 29

⁶⁵ Robert A. Lue, “The Future of Work Is the Future of Higher Education,” *Scientific American* (“Observations” blog, September 11, 2019), <https://blogs.scientificamerican.com/observations/the-future-of-work-is-the-future-of-higher-education>.

⁶⁶ Wiley Education Services, “2025: A Look Into the Future of Higher Education” [infographic], undated, <https://edservices.wiley.com/2025-future-of-higher-ed-infographic>.



Framing the Future *(Continued)*



◆ For discussion

- How does our institution approach “futuring”? How do we predict what the future environment will be for our institution? Is it effective?
- How can we engage the entire campus community in productive conversations focused on the changing nature of higher education?
- How prepared are we to mobilize large-scale change in response to upcoming shifts? What capabilities and resources do we need to increase our change-readiness?

Asked what administrators in higher education need to do to prepare their institutions for lifelong postsecondary education, an expert from Georgia Tech said one priority should be to “help learners cope with the complexity of choices that they’re going to face.” Second, he said, institutions will need to invest in tools like artificial intelligence and data analytics for personalizing student advising services. Third, he suggested that “it’s critical we maintain personal connections.” Georgia Tech, he said, “had to rethink how to provide face-to-face, person-to-person contact between the institution and its students, regardless of where they’re located” and is framing a new business model for delivering services to students around the world. While the contours of that new design have yet to fully come into focus, he said, Georgia Tech expects that “it will not look like a vertically integrated campus. It will be much more organically embedded in global communities, and attuned to the needs of the people who are attending Georgia Tech.”⁶⁷

Among 10 predictions for the near future of higher education, expert Brandon Busteed believes that “instead of going to college to get a job, students will increasingly be going to a job to get a college degree.” Busteed believes that “graduating debt free—with a job—will be the ultimate student outcome metric.” Higher education will see more growth in non-degree educational offerings than in degree programs, he predicts, and internships, co-ops, and “credegress”—programs where students graduate with both a traditional bachelor’s degree and an industry-recognized skill or credential—will become staples of college education. Busteed further projects that “employers will become a new breed of accreditor for higher education.”⁶⁸

A paper from Academic Impressions frames four paradoxes in higher education today. “Even amid growing awareness that the business model is broken,” the paper asserts, “colleges and states are doubling down on that traditional mode.” The paper argues that “the way we are managing our educational model is undermining its relevance and value,” and that even though higher education needs to change quickly, “decision-making and governance models are not supportive of rapid innovation.” Another paradox is that while research shows that the value of college degrees is increasing, the public remains skeptical about higher education’s ROI. Strategies for moving forward include relying on student success to generate needed financial resources and grow public support; faculty innovation; finding new models of innovation, both in and out of the academy; and developing leadership capacity within institutions that can “provide us with the ‘strategic wedge’ to drive swifter, transformational change.”⁶⁹

67 Richard DeMillo [interview], “Looking to 2040: Anticipating the Future of Higher Education,” *The EvoLLLution* (July 24, 2018), https://evollution.com/revenue-streams/market_opportunities/looking-to-2040-anticipating-the-future-of-higher-education.

68 Brandon Busteed, “Ten Predictions for the Very Near Future of Higher Education,” *Forbes* (November 27 2019), www.forbes.com/sites/brandonbusteed/2019/11/27/ten-predictions-for-the-very-near-future-of-higher-education/#585f799152a3.

69 Amit Mrig and Pat Sanaghan, *The Future of Higher Education*, Academic Impressions (2018), www.academicimpressions.com/wp-content/uploads/2018/10/future-of-higher-education.pdf.

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At SCUP, we believe that by uniting higher education leaders, we can meet the rapid pace of change and competition, advancing each institution as it shapes and defines its future. Through connection, learning, and expanded conversation, we help create integrated planning solutions that will unleash the promise and potential of higher education.



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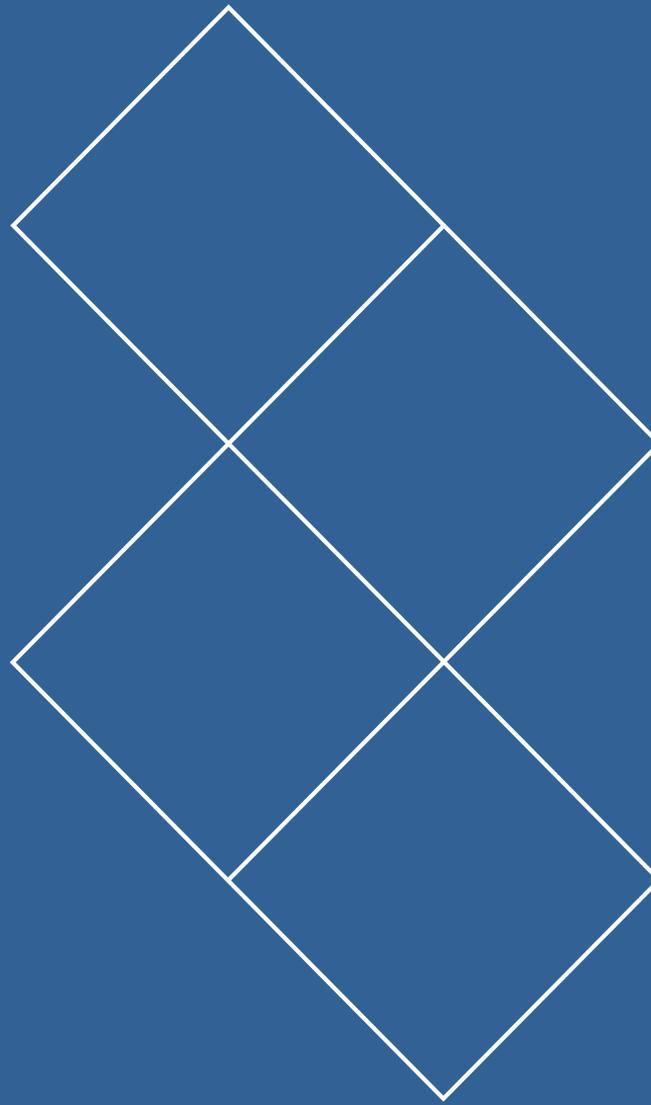
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