Higher Education Futures - Meta-Themes and Tools

Louisiana Board of Regents
eLearning Speaker Series

April 21, 2021

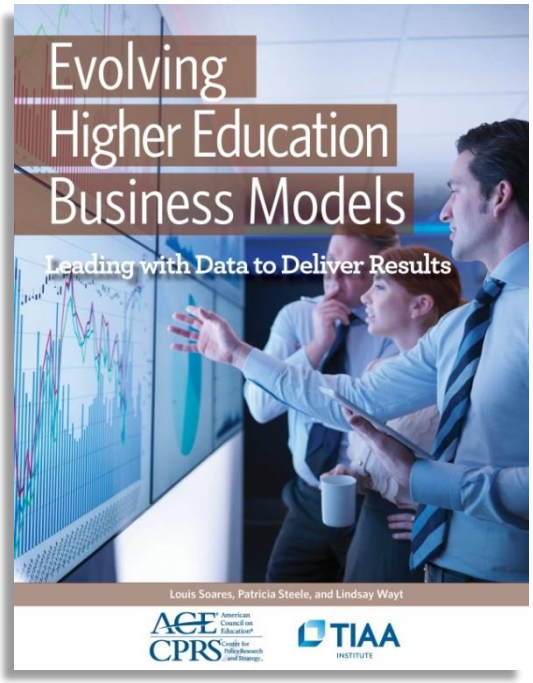
Louis Soares

Chief Learning and Innovation Officer

American Council on Education®

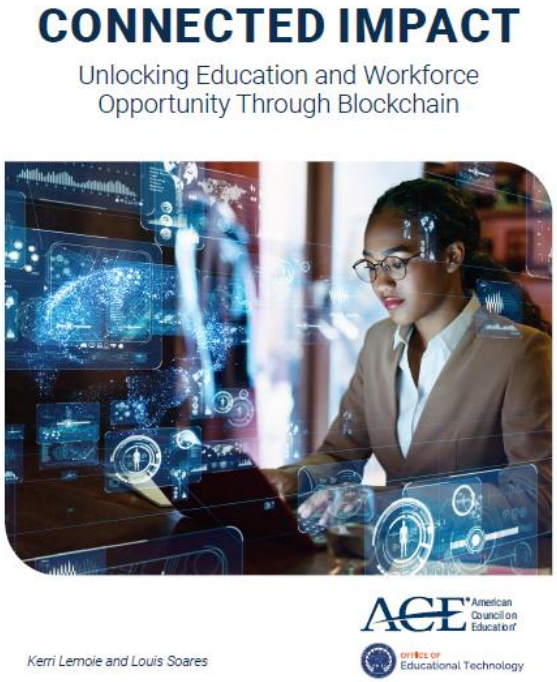
Overview

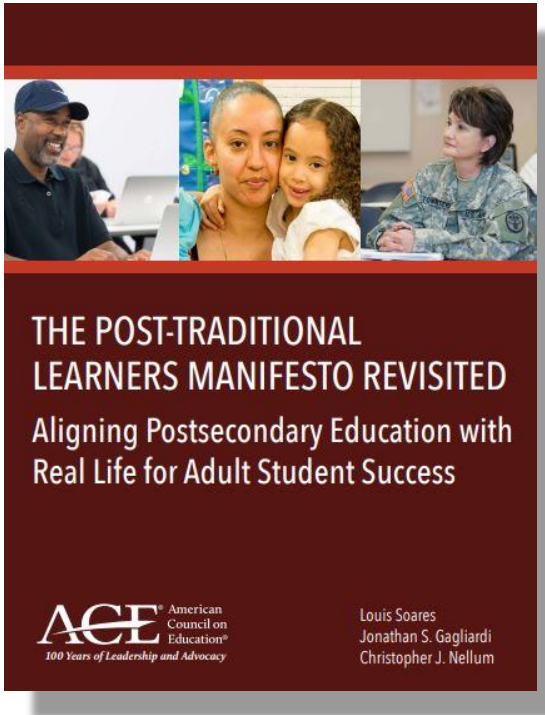
- ACE & Me
- Snapshot of LA Board of Regents
- What's Normal in Higher Education Today?
- The Future
- 21st Century System Characteristics
- Discussion

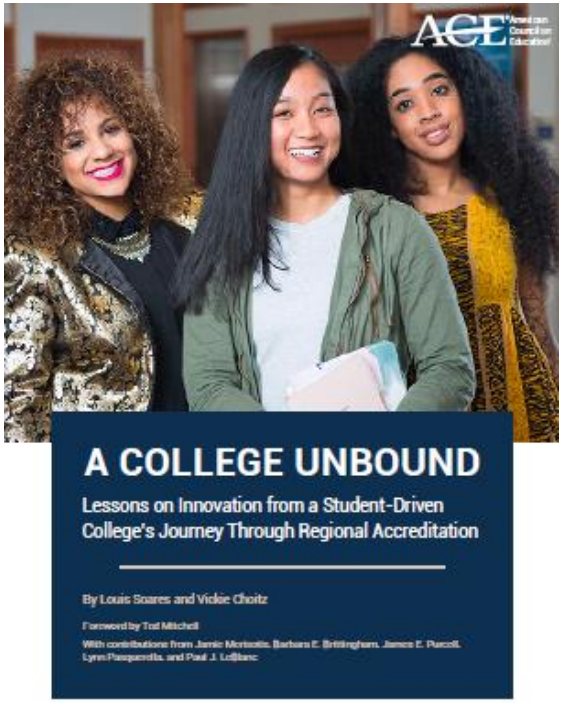

Evolving
Higher Education
Business Models
Leading with Data to Deliver Results
Louis Soares, Patricia Steele, and Lindsay Wayt
ACE American Council on Education
CPRS Center for Policy Research and Strategy
TIAA INSTITUTE


Innovative
Leadership
Insights from the American College President Study 2017
Louis Soares
Jonathan S. Gagliardi
Philip J. Wilkinson
Sherri Lind Hughes
ACE American Council on Education
TIAA Institute


Huron, the American Council on Education (ACE) and the Georgia Institute of Technology
The Transformation-Ready
Higher Education Institution
HOW LEADERS CAN PREPARE FOR AND PROMOTE CHANGE
BEGIN READING
HURON
ACE American Council on Education
Georgia Tech

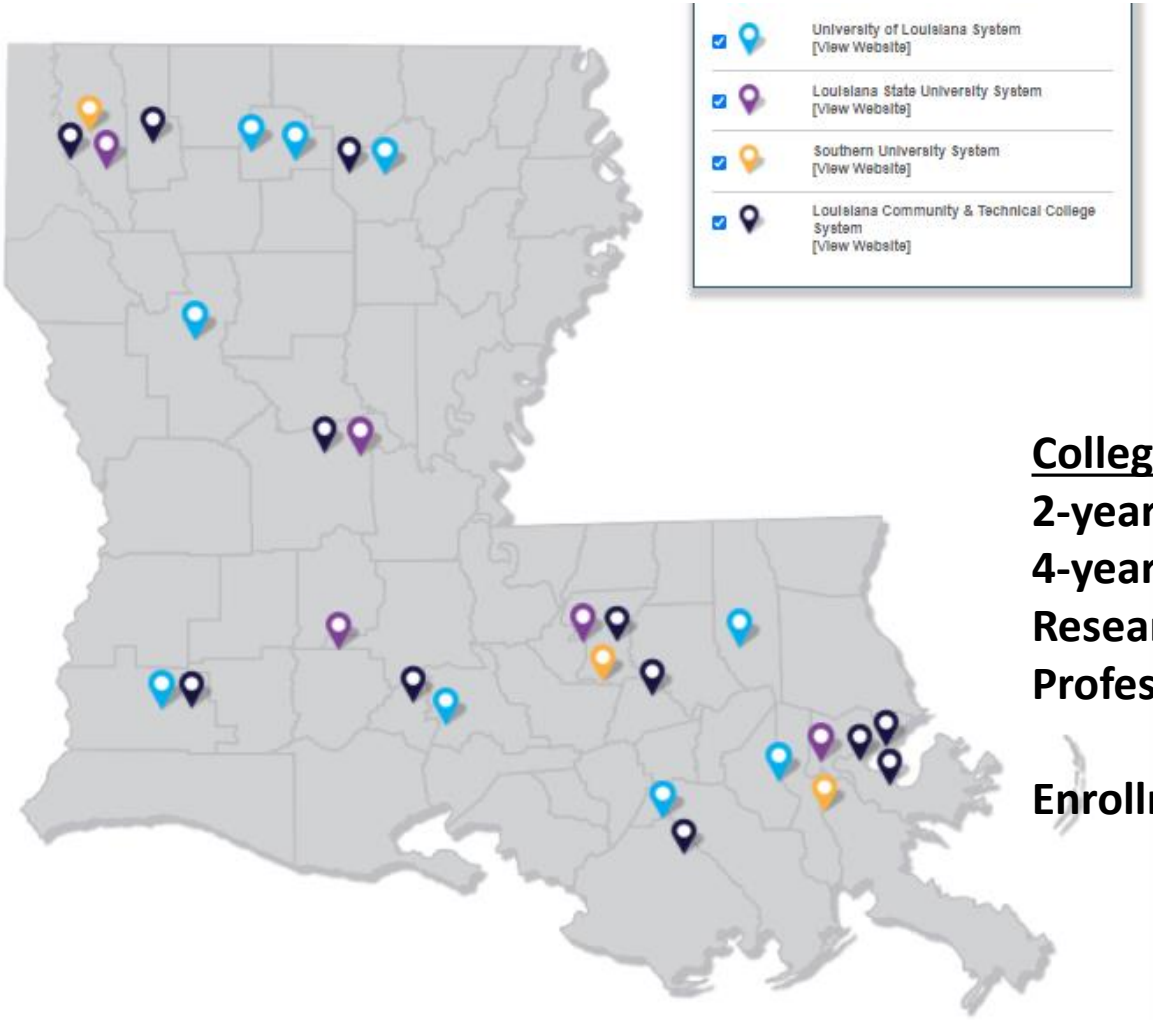

CONNECTED IMPACT
Unlocking Education and Workforce
Opportunity Through Blockchain
ACE American Council on Education
Kerri Lemoie and Louis Soares
Office of Educational Technology


THE POST-TRADITIONAL
LEARNERS MANIFESTO REVISITED
Aligning Postsecondary Education with
Real Life for Adult Student Success
ACE American Council on Education
100 Years of Leadership and Advocacy
Louis Soares
Jonathan S. Gagliardi
Christopher J. Nellum


ACE American Council on Education
A COLLEGE UNBOUND
Lessons on Innovation from a Student-Driven
College's Journey Through Regional Accreditation
By Louis Soares and Vickie Choitz
Foreword by Tod Mitchell
With contributions from Jamie Merisotis, Barbara E. Brittingham, James E. Purcell,
Lynn Pasquerella, and Paul J. LeBlanc

BOARD of REGENTS
STATE OF LOUISIANA

Colleges and Universities



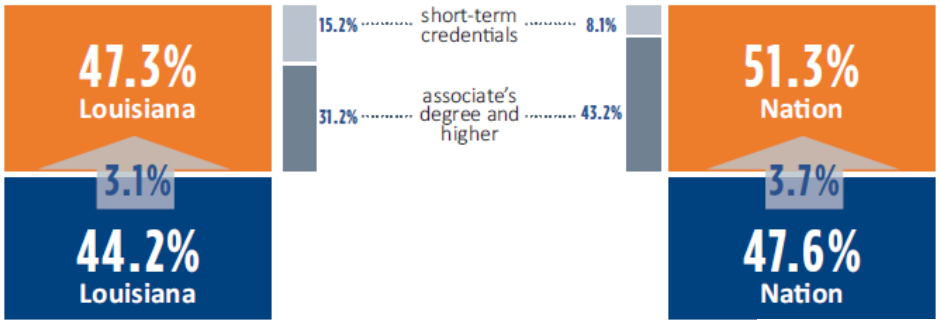
Colleges and Universities	
2-year	15
4-year	15
Research	3
Professional	4
Enrollment	210K+

EDUCATIONAL ATTAINMENT

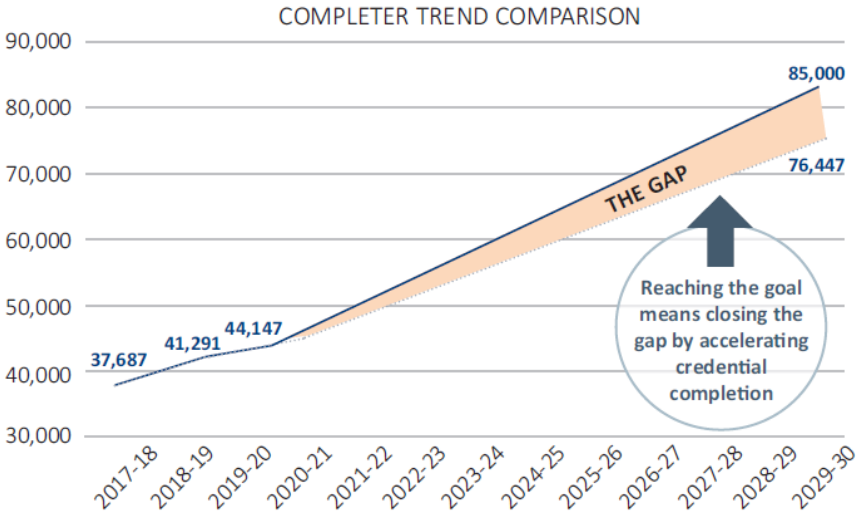
State Increased but Lagging the Nation

GOAL: 60% x 2030

Though Louisiana has made progress in attainment, the national average increased by a larger percentage. To develop talent to its highest potential, we must close this gap.



MORE THAN DOUBLING THE NUMBER OF CREDENTIALS



MASTER PLAN YEAR 1 REVIEW

60% BY 2030

STRATEGIES

- Closing Achievement Gaps
- Dual Enrollment: Start Strong
- Improve Outcomes
- Incentivizing Success: Outcomes Based Funding
- Make Pathways Attainable by Making Them Affordable
- Mapping and Stacking Credentials
- New Education Delivery Models
- Innovating for a Prosperity Pipeline
- The Power of Research Universities
- Methods to Measure Success

Figure 1. Percent Change in Enrollment from Previous Year by Institutional Sector: 2016 to 2020

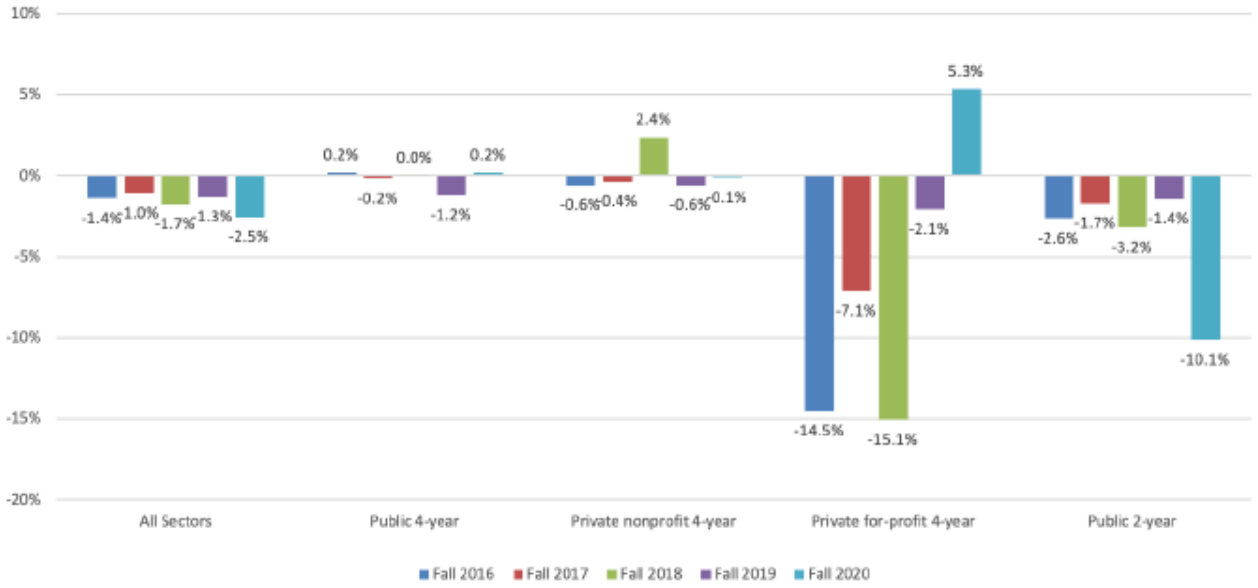
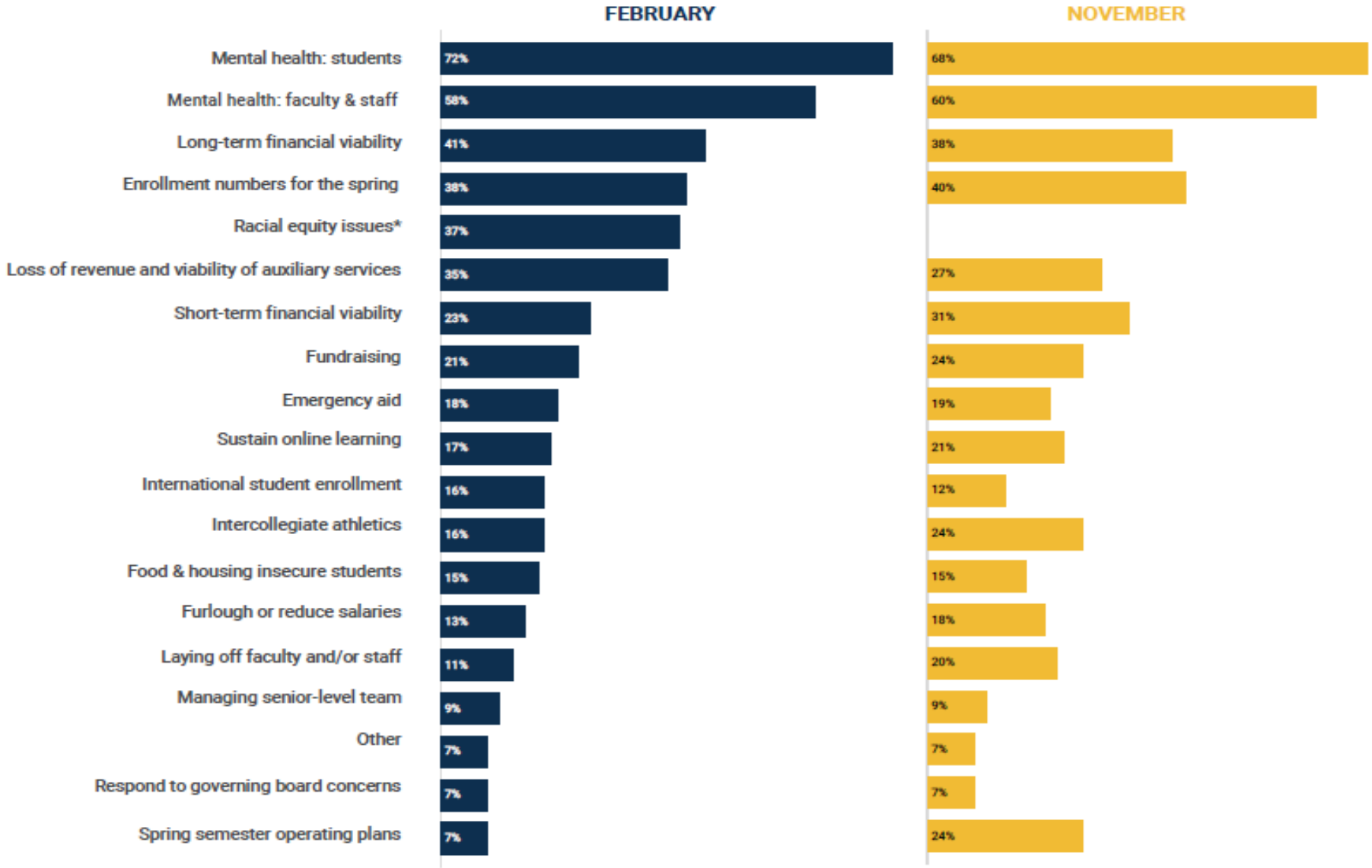


Table 1. Estimated National Enrollment by Institutional Sector: 2018 to 2020

Sector	Fall 2020		Fall 2019		Fall 2018	
	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year
Total Enrollment (All Sectors)	17,778,484	-2.5%	18,239,874	-1.3%	18,482,391	-1.7%
Public 4-year	8,004,360	0.2%	7,989,984	-1.2%	8,087,410	0.0%
Private nonprofit 4-year	3,839,485	-0.1%	3,842,930	-0.6%	3,864,957	2.4%
Private for-profit 4-year	789,888	5.3%	749,885	-2.1%	765,596	-15.1%
Public 2-year	4,824,204	-10.1%	5,368,470	-1.4%	5,445,562	-3.2%
Unduplicated Student Headcount (All Sectors)	**17,491,813**	**-2.6%**	**17,965,287**	**-1.3%**	**18,196,846**	**-1.4%**

Figure 1: Most Pressing Issues Facing Presidents Due to COVID-19 in November 2020 and February 2021



* Denotes item available in the February survey only.

Figure 2: Primary Mode of Instruction in Fall 2020 and Spring 2021

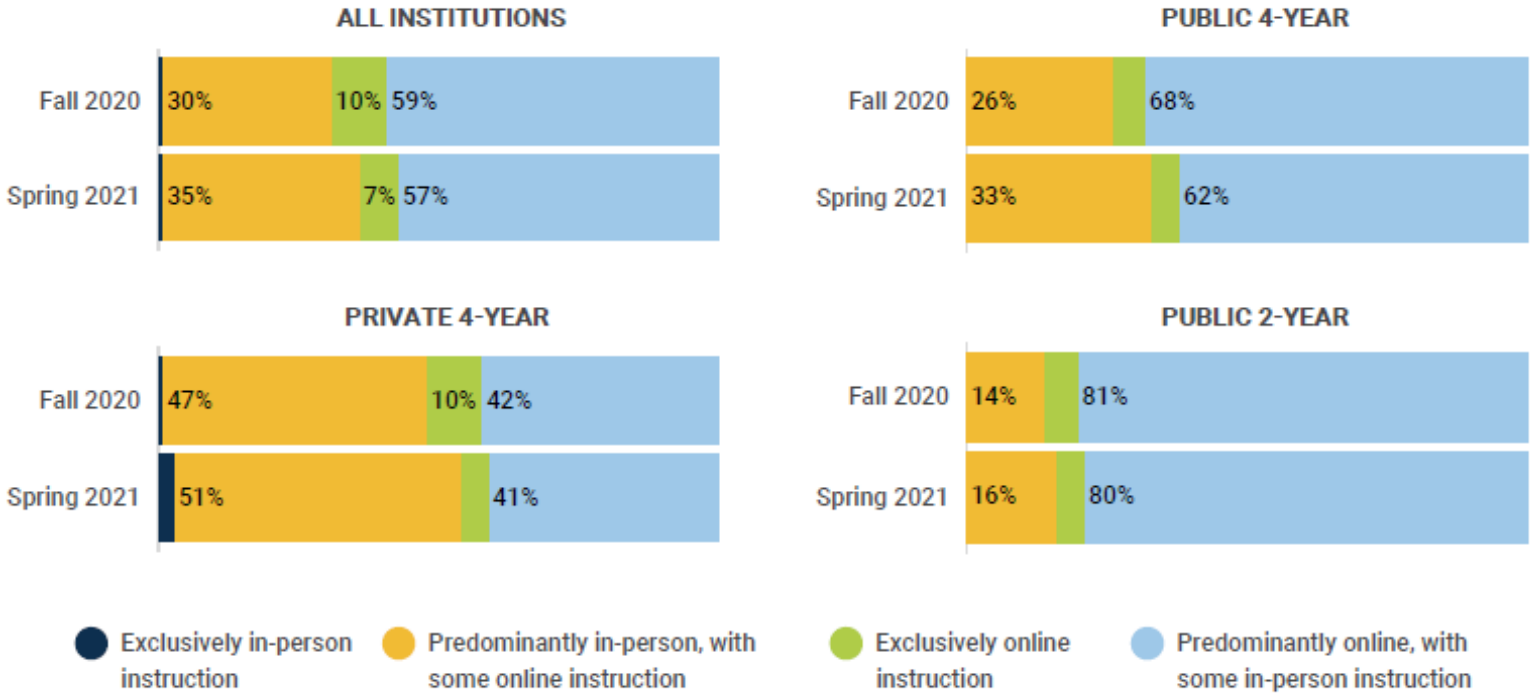


Figure 11. Functional Areas with the Greatest Increase in Expenses as a Direct Result of the Pandemic

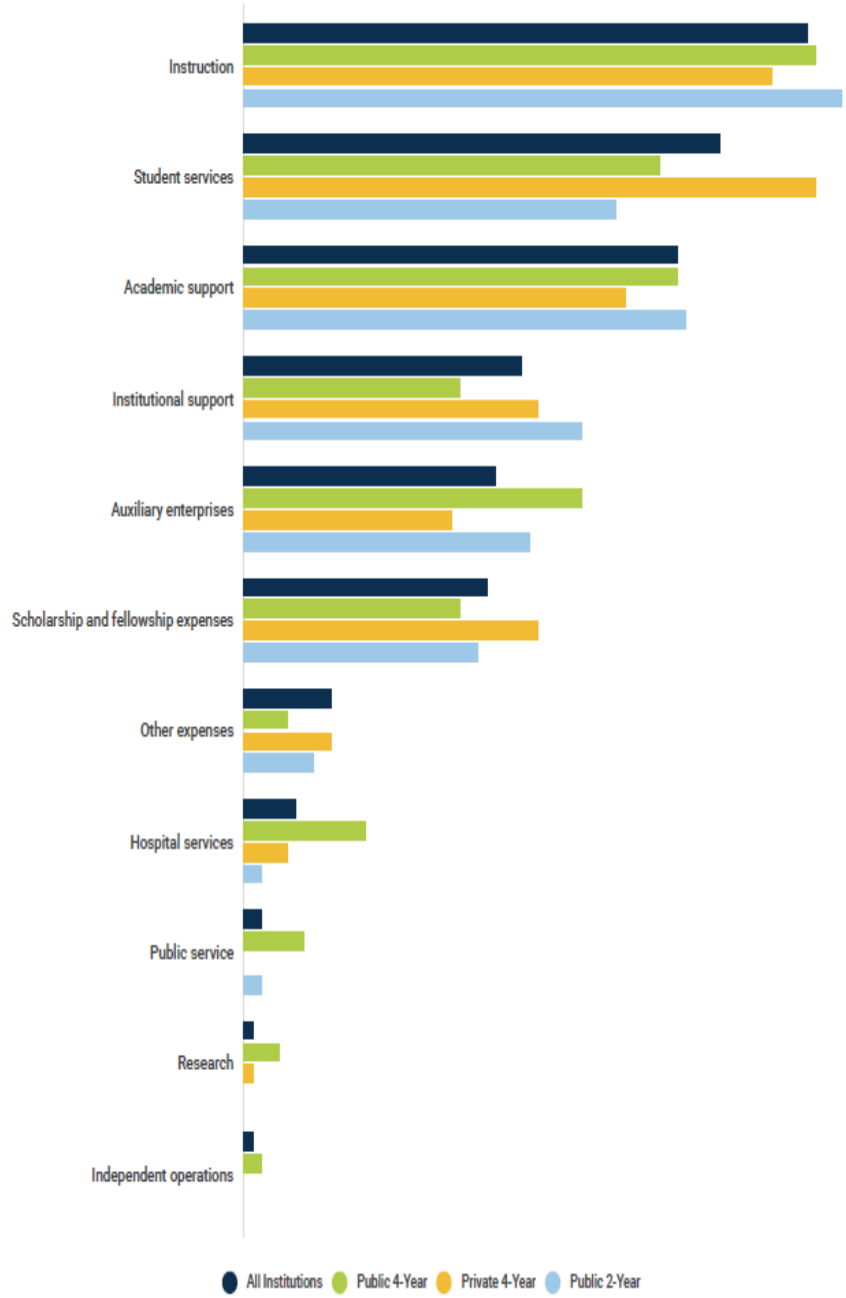


Figure 6: Percent of Presidents Who Anticipate Keeping Changes or Adaptations Made to Student Services

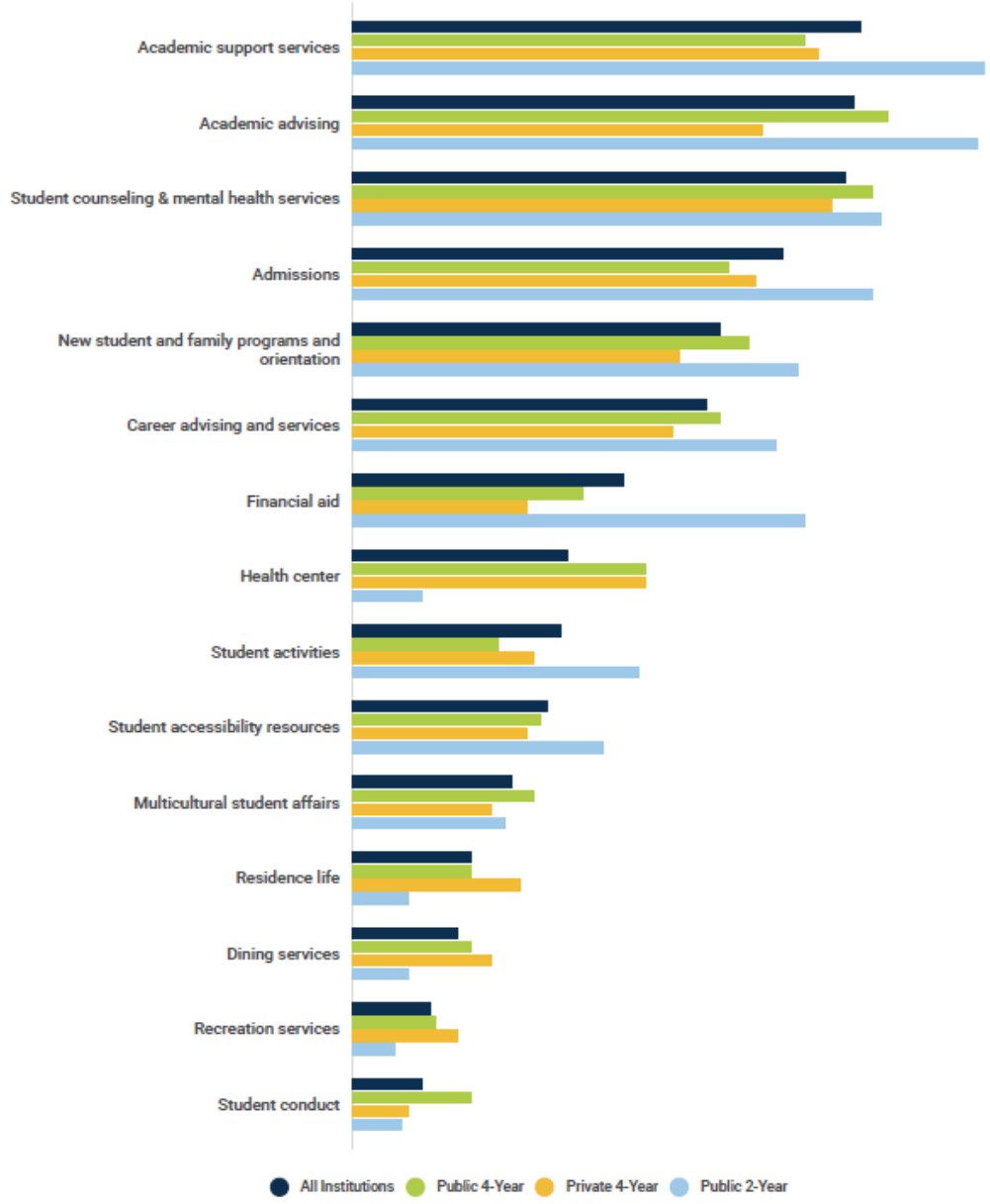


Figure 12. Impact of the Pandemic on Institutional Revenues

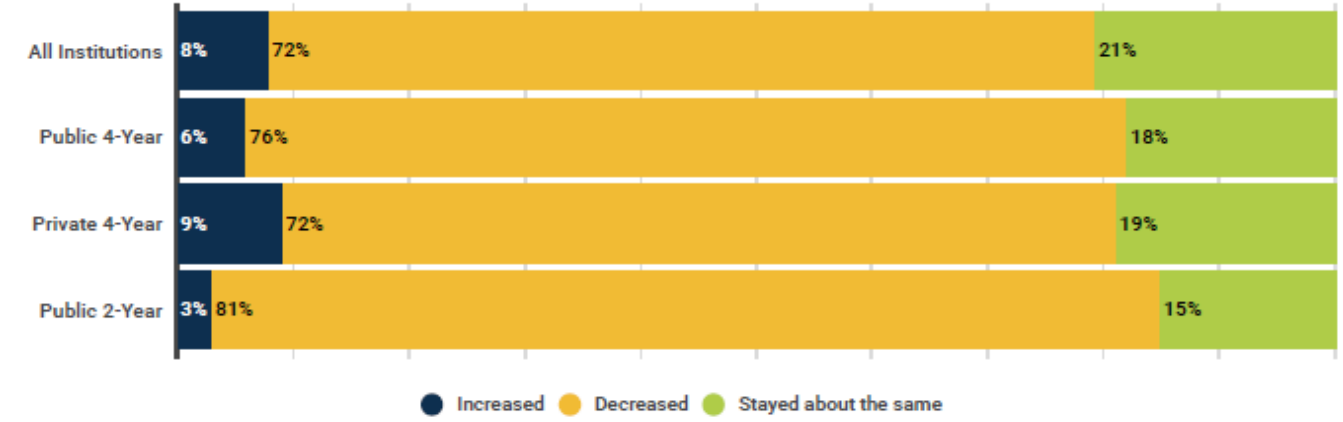


Figure 14. Institution's Level of Dependency on Tuition Revenue for Annual Operating Expenses

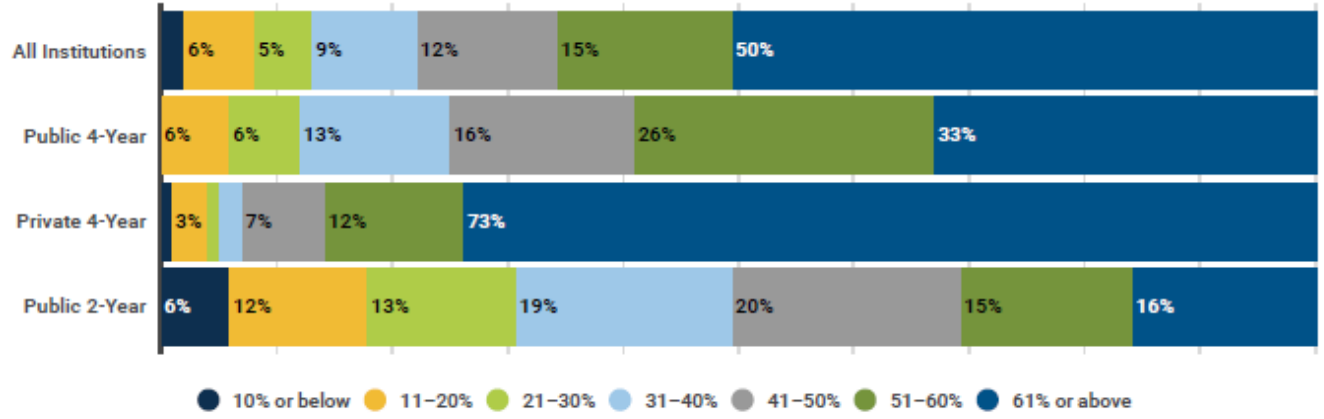


Figure 16. Anticipated Changes in State Appropriations Between Fiscal Years 2021 and 2022

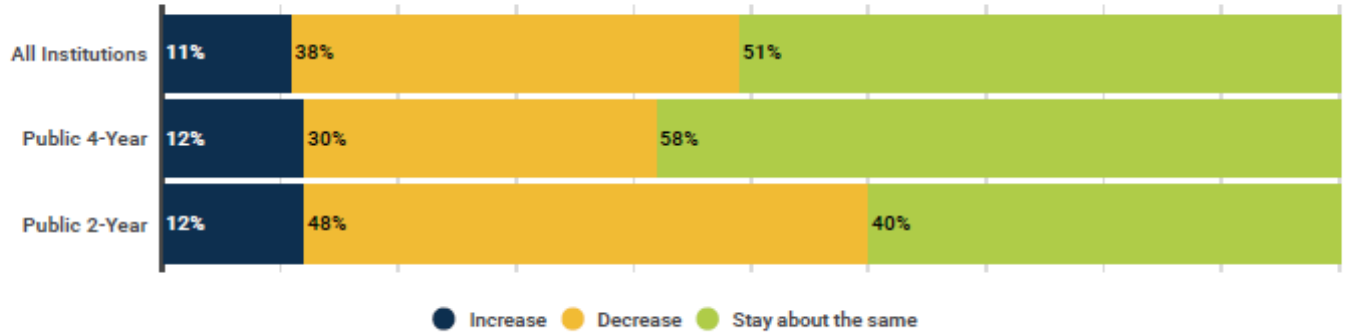


Figure 21. Participation in Discussions Regarding Institutional and Organizational Partnerships

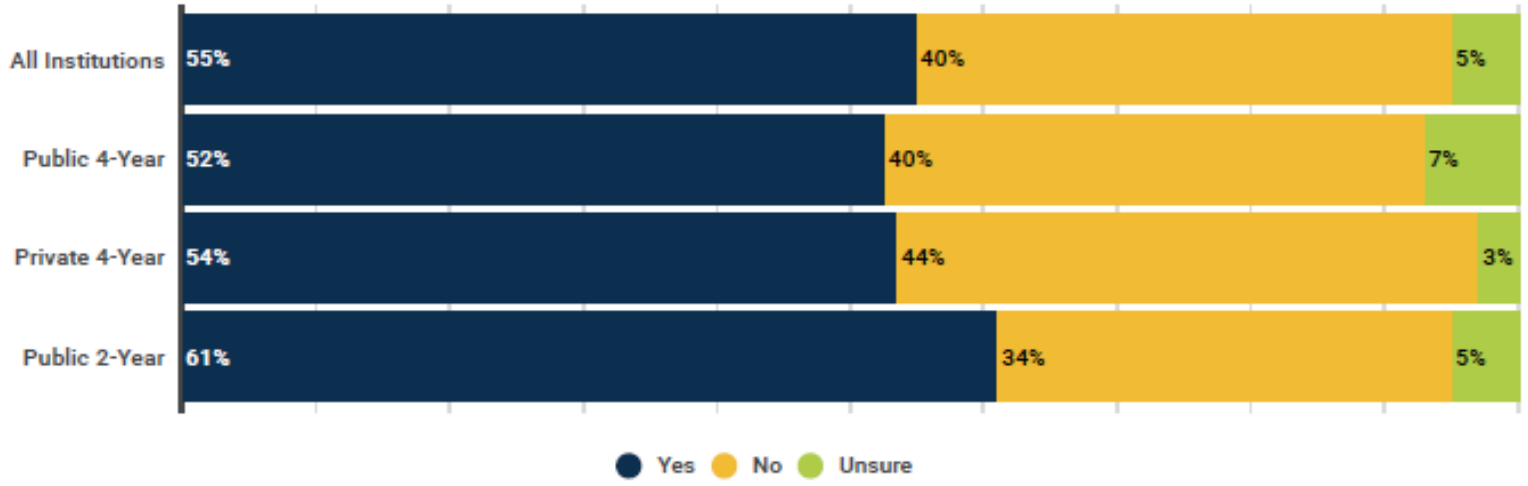


Figure 22. Potential Partnerships Being Considered with Other Institutions and Organizations

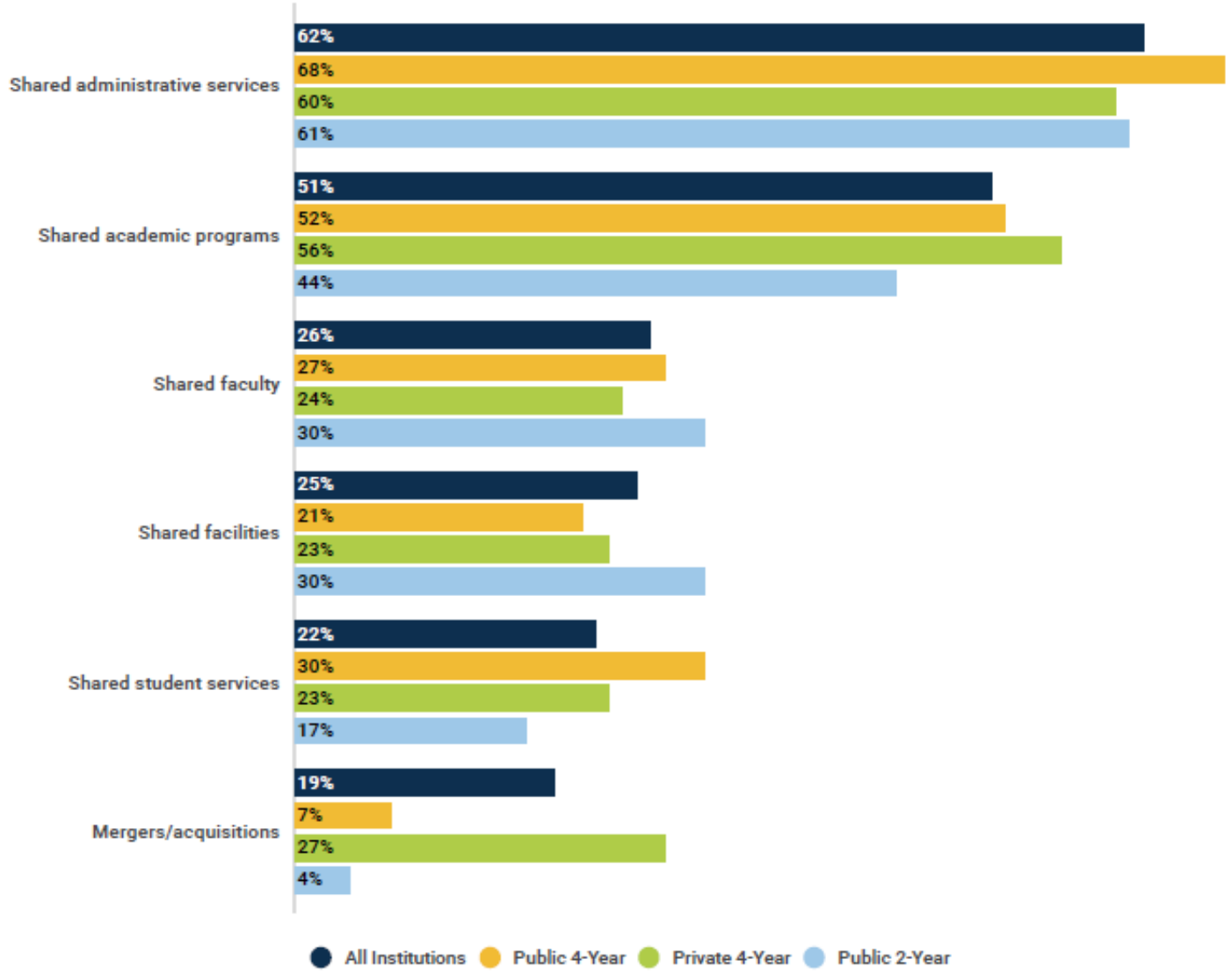
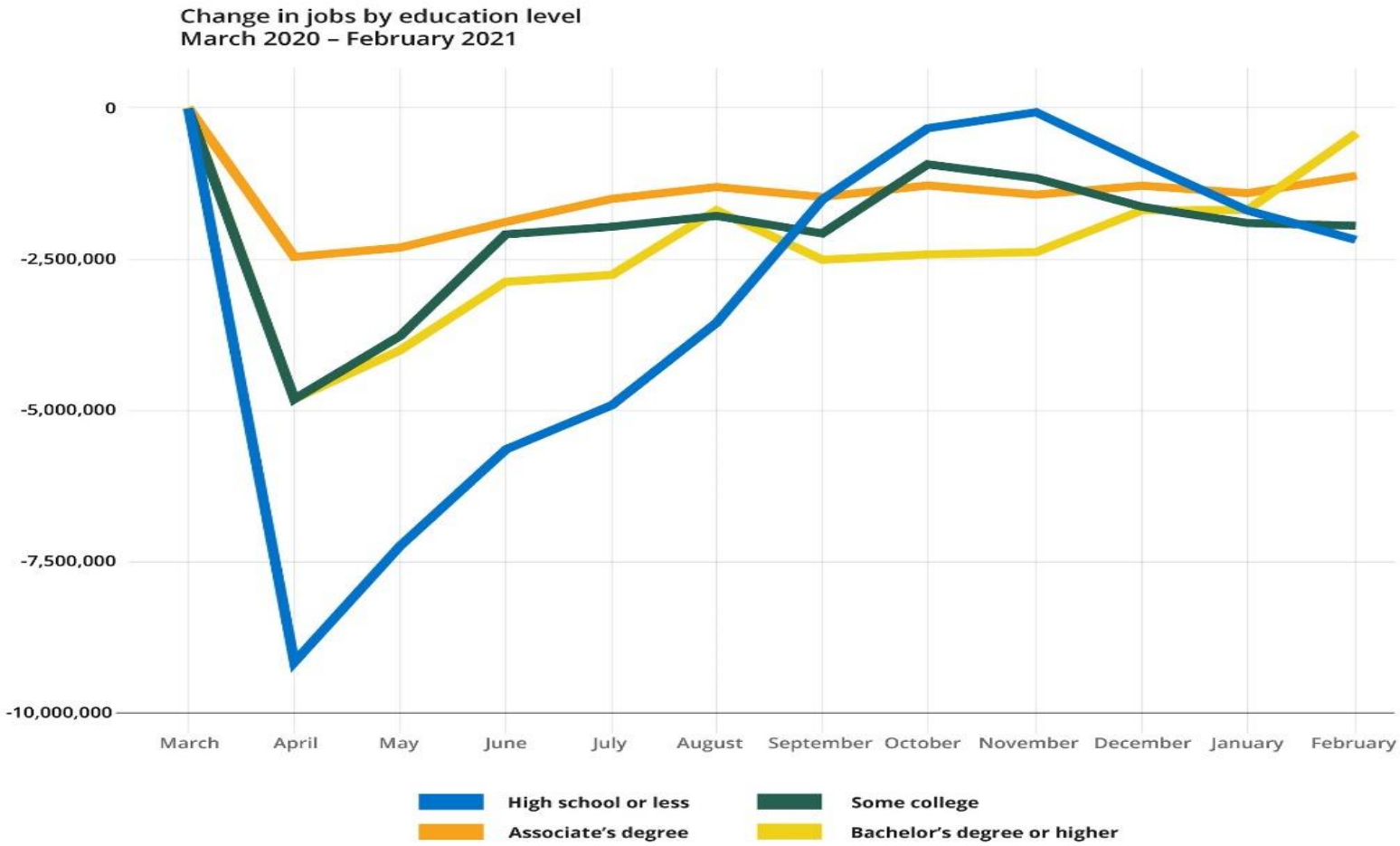
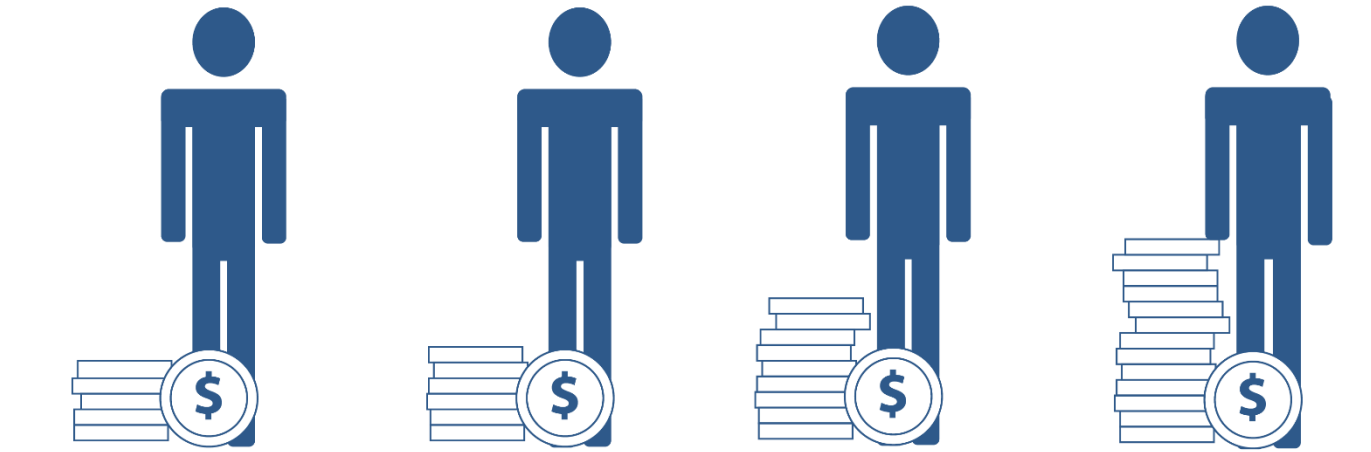


Figure 4. Workers with less education faced more job losses since March 2020.



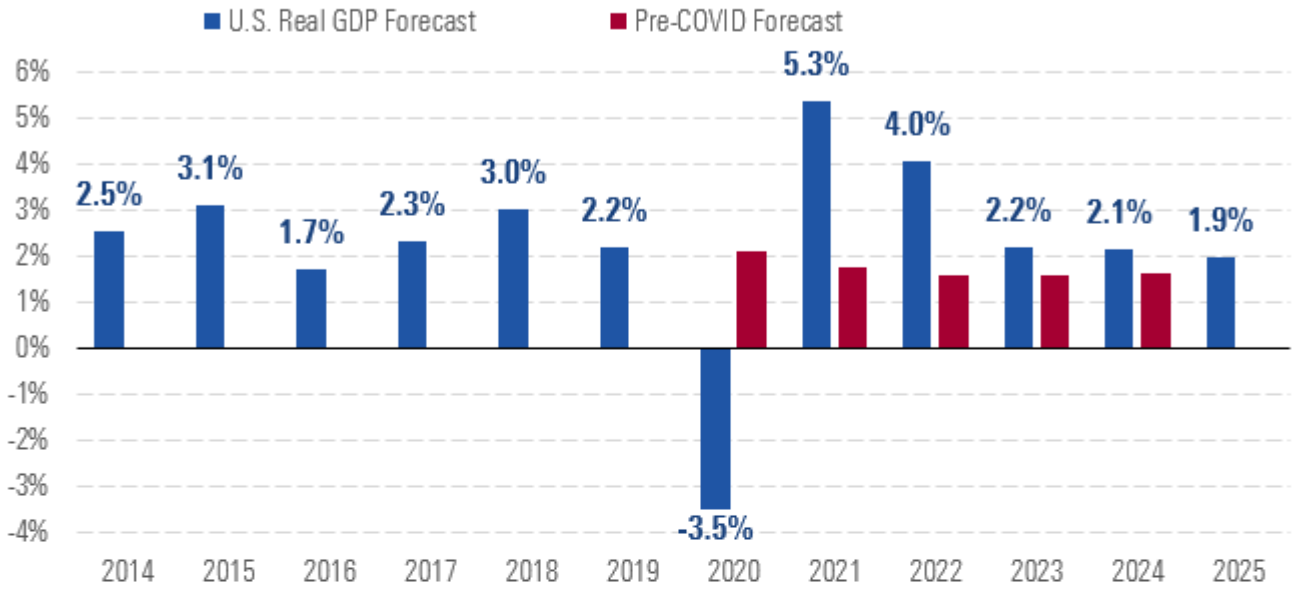
Full-Time Workers With a Bachelor's Earn 74% More Annually Than Those With Just a High School Diploma



Source: U.S. Census Bureau, 2017 American Community Survey 5-Year Estimates.

We Expect U.S. GDP to Recover to Within 1% of Our Pre-COVID-19 Expectation

U.S. real GDP forecast (growth).



Source: MorningStar, March 2021

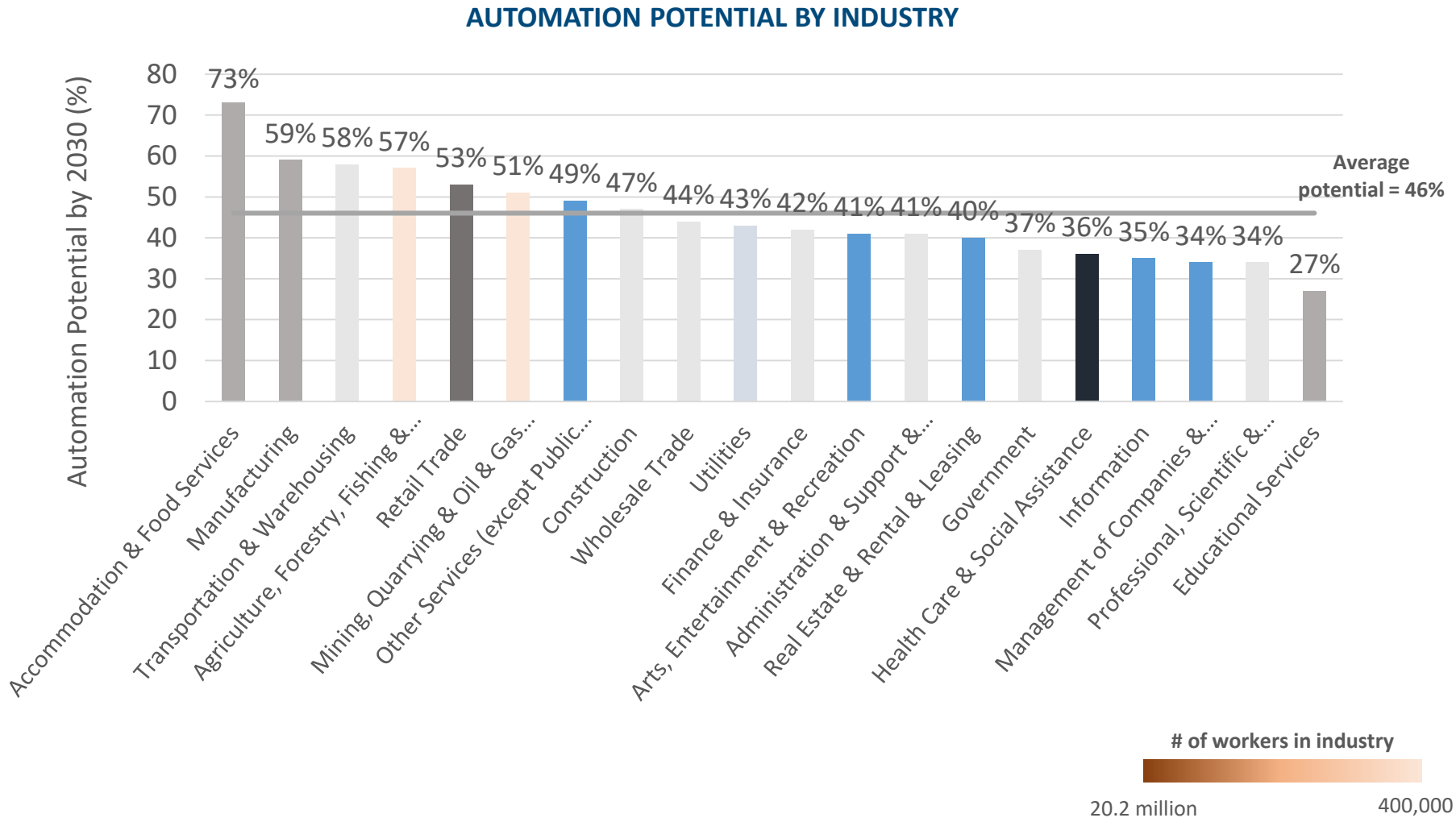
The Jobs That Will Drive the Recovery

The Readiness Economy	• COVID-19 has revealed how ill-prepared we all are – the "black elephant" we've been ignoring. Preparedness will **boost demand in healthcare, infrastructure, cybersecurity, environmental tech, insurance**, etc.
The Remote Economy	• As more work gets performed remotely, there will be **growing dependence on the data and software** that are the key underpinnings of the remote economy.
The Logistics Economy	• Manufacturers can see the **vulnerability of supply chains**, etc. **Reshoring** some industries will put greater focus on **advanced manufacturing**. Similarly, there will be greater need for **logistics expertise**.
The Automated Economy	• Employers will prioritize automation over hiring back low-value workers. **Jobs driving automation will thrive**.
The Green Economy	• Despite political reluctance to act on climate change, utilities, and consumers are already placing their bets on renewable energy. **70% of new energy generation coming online is from renewables.**

Source: Burning Glass Technologies, 2021

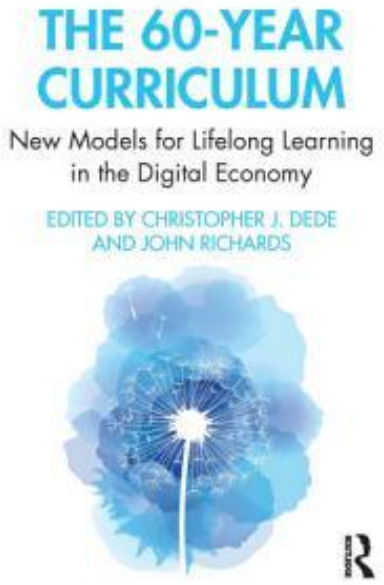
THE FUTURE

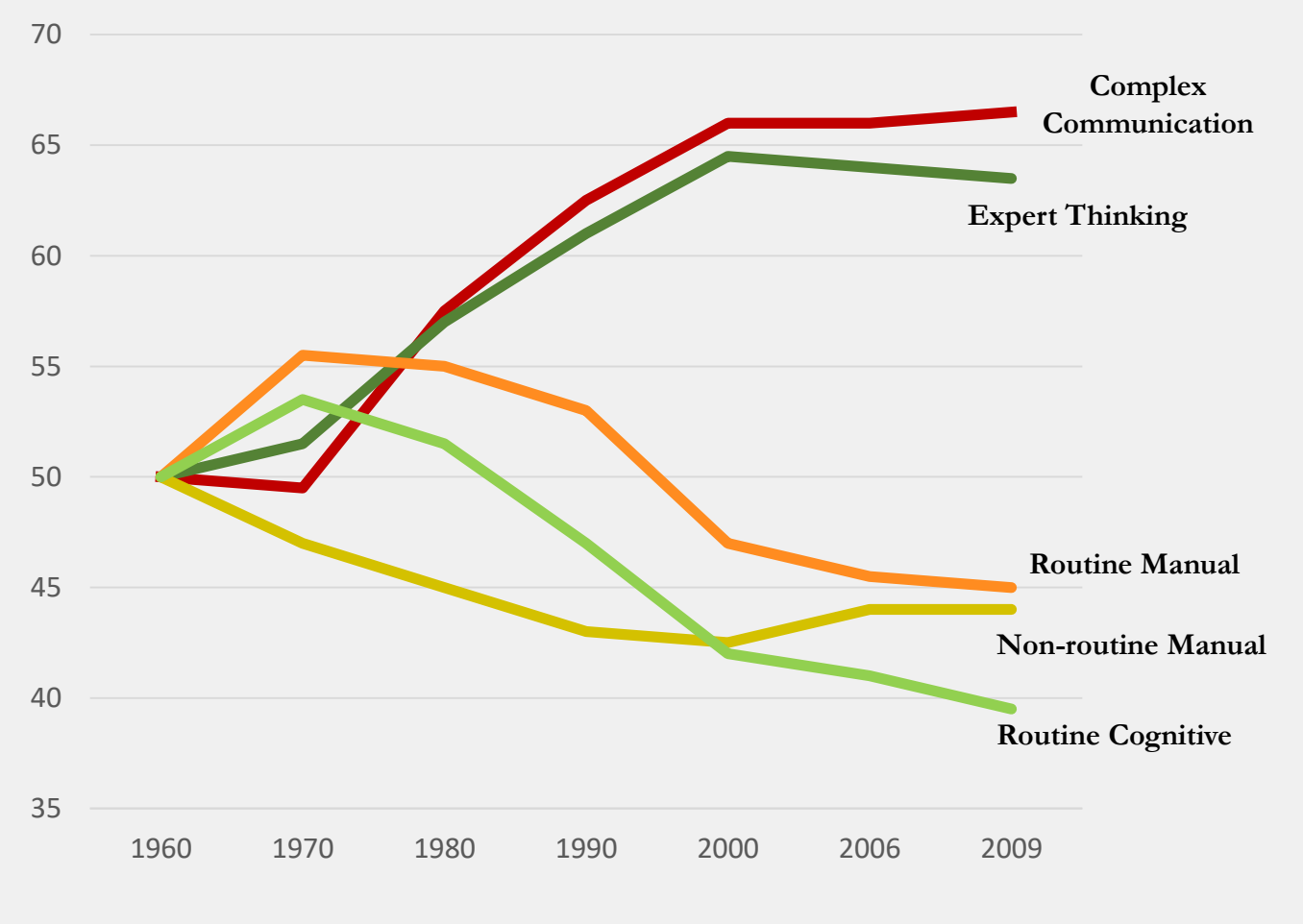
Robots Changing the Economy



Source: Brookings analysis of BLS, Census, EMSI, Moodys, and McKinsey data, January 2019

Rise of the Human/Expertise Economy

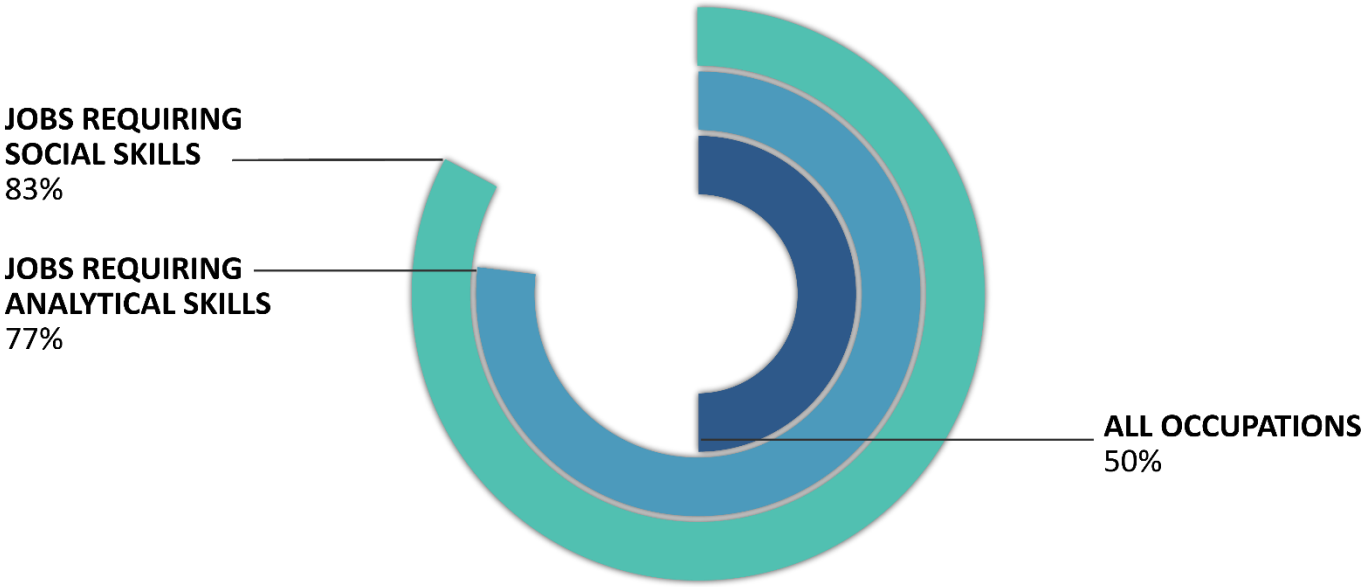




Source: Dancing With Robots: Human Skills for Computerized Work, The Third Way, 2013

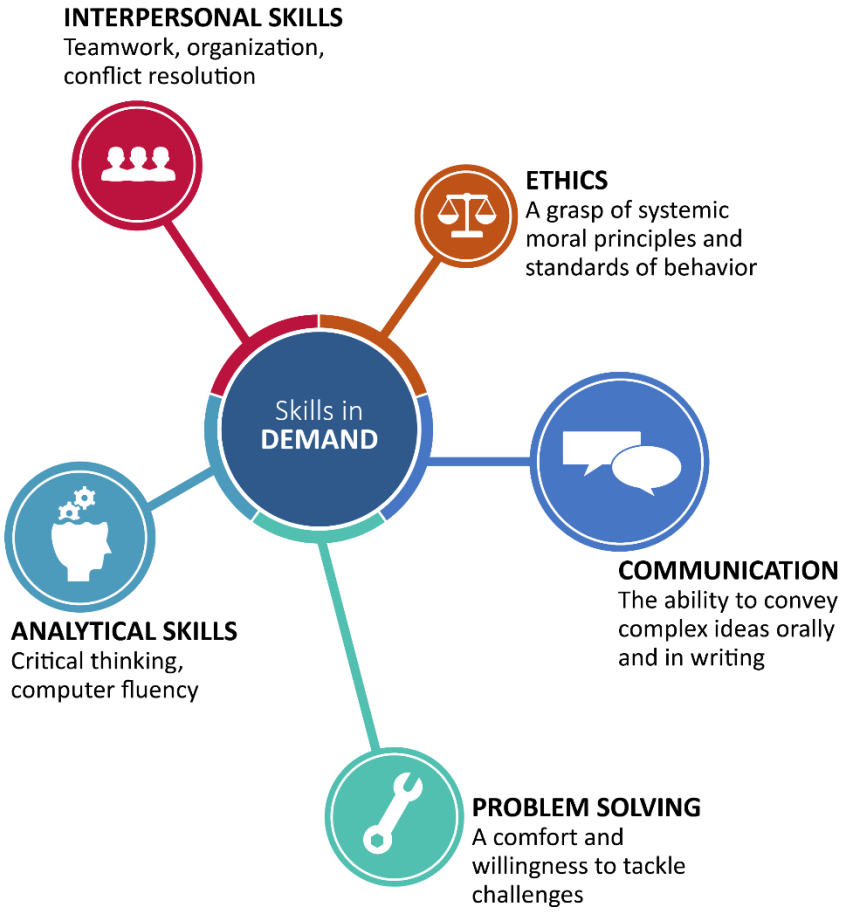
Employment Growth Is More Rapid In Occupations Requiring Higher Social or Analytical Skills

Percent change in employment, 1980-2015



Source: Pew Research Center, "*The State of American Jobs*," October 2016.

Skills Commonly Associated With a college education Are Among the Most In-Demand From Employers

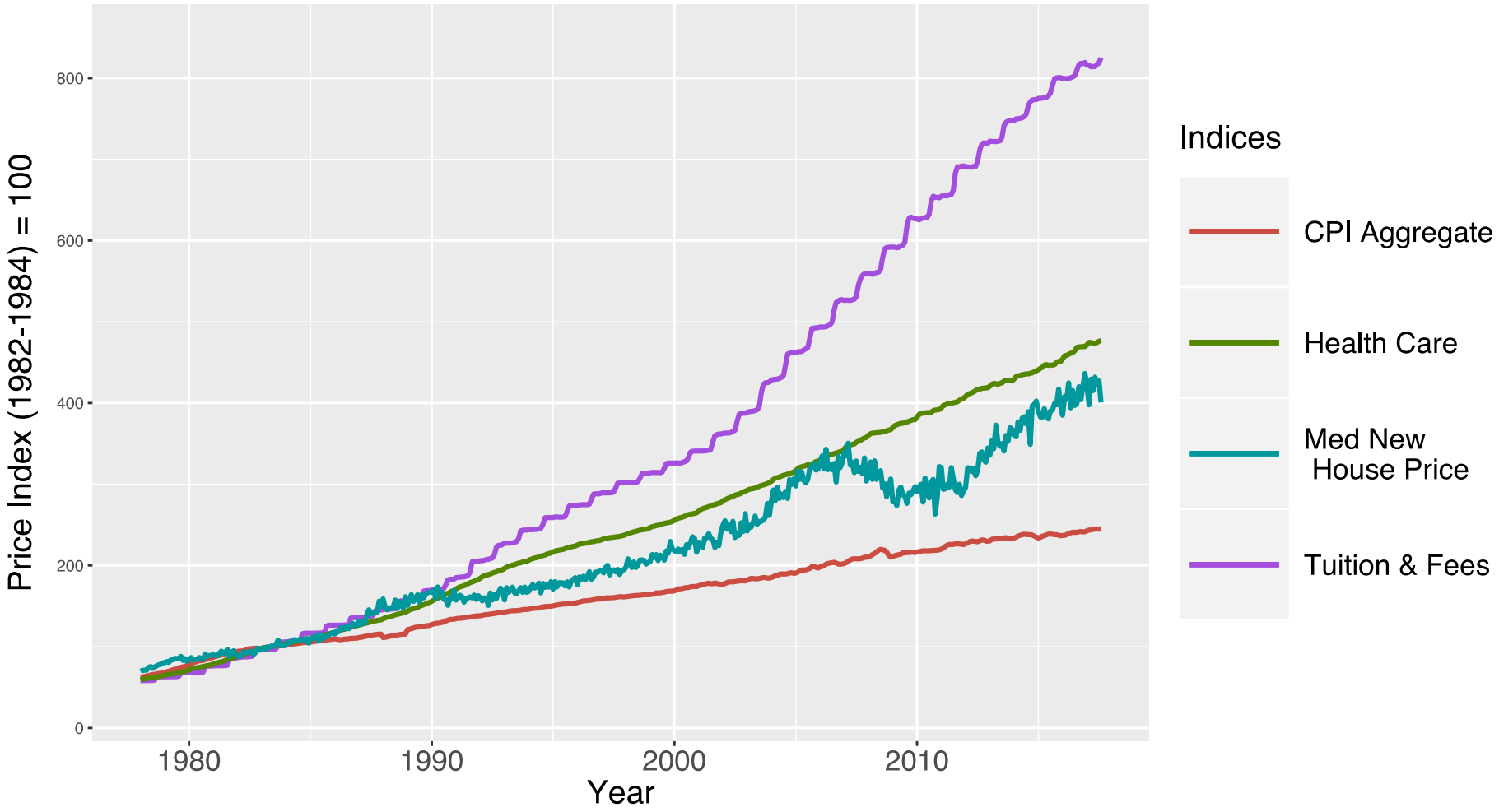


Source: Emsi & Strada Institute for the Future of Work, "*Robot-Ready: Human+ Skills for the Future of Work*," 2018; Georgetown University Center on Education and the Workforce, "*The Economic Value of College Majors*," 2015; The Pew Research Center, "*The State of American Jobs*," 2016; Vectors by vecteezy.com.

Yet, an array of pressures are upending traditional postsecondary education

- Economic/Financial
- Social/Demographics
- Technological
- Accountability

College Affordability

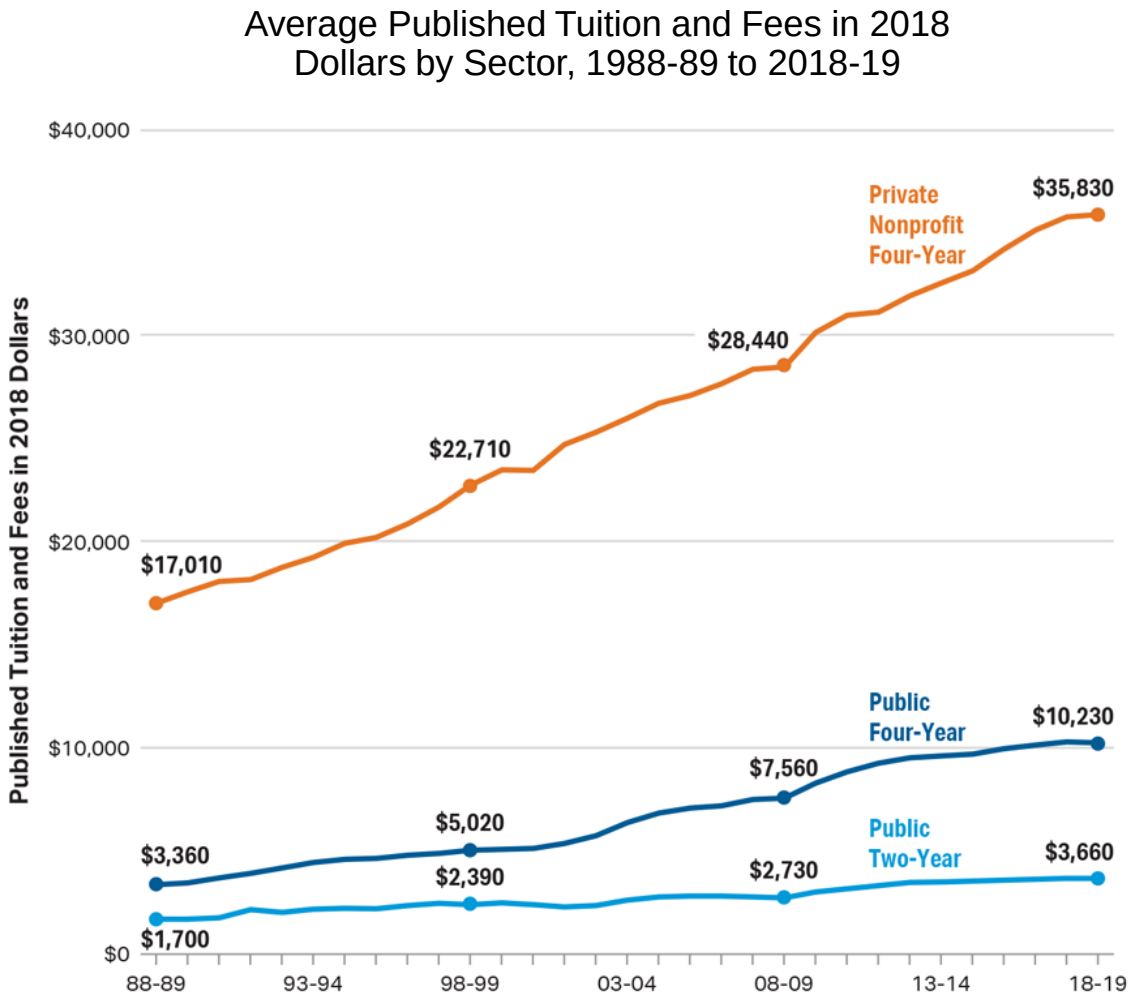


Sources: U.S. Census, and U.S. Bureau of Labor Statistics

Tuition and fees continue to rise

In 1987, the student share of public higher education total educational revenues was 23%. By 2017 it had increased to 46%.

The student share of public higher educational revenues is expected to rise above 50% during the next economic downturn.



State Spending on Higher Education Is Well Below Pre-Recession Levels

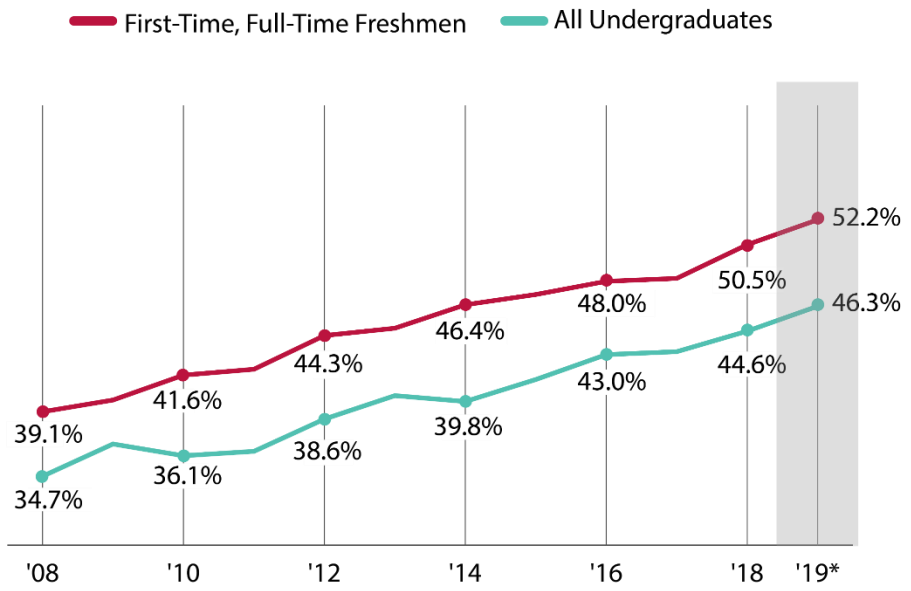
Total state spending, adjusted for inflation

Note: All years are state fiscal years, which usually begin in July of the previous calendar year and end the following June. Therefore the typical state fiscal year 2008 began on July 1, 2007, and ended on June 30, 2008.

Source: Michael Mitchell, et al. "*A Lost Decade in Higher Education*," Center on Budget and Policy Priorities, August 2017.

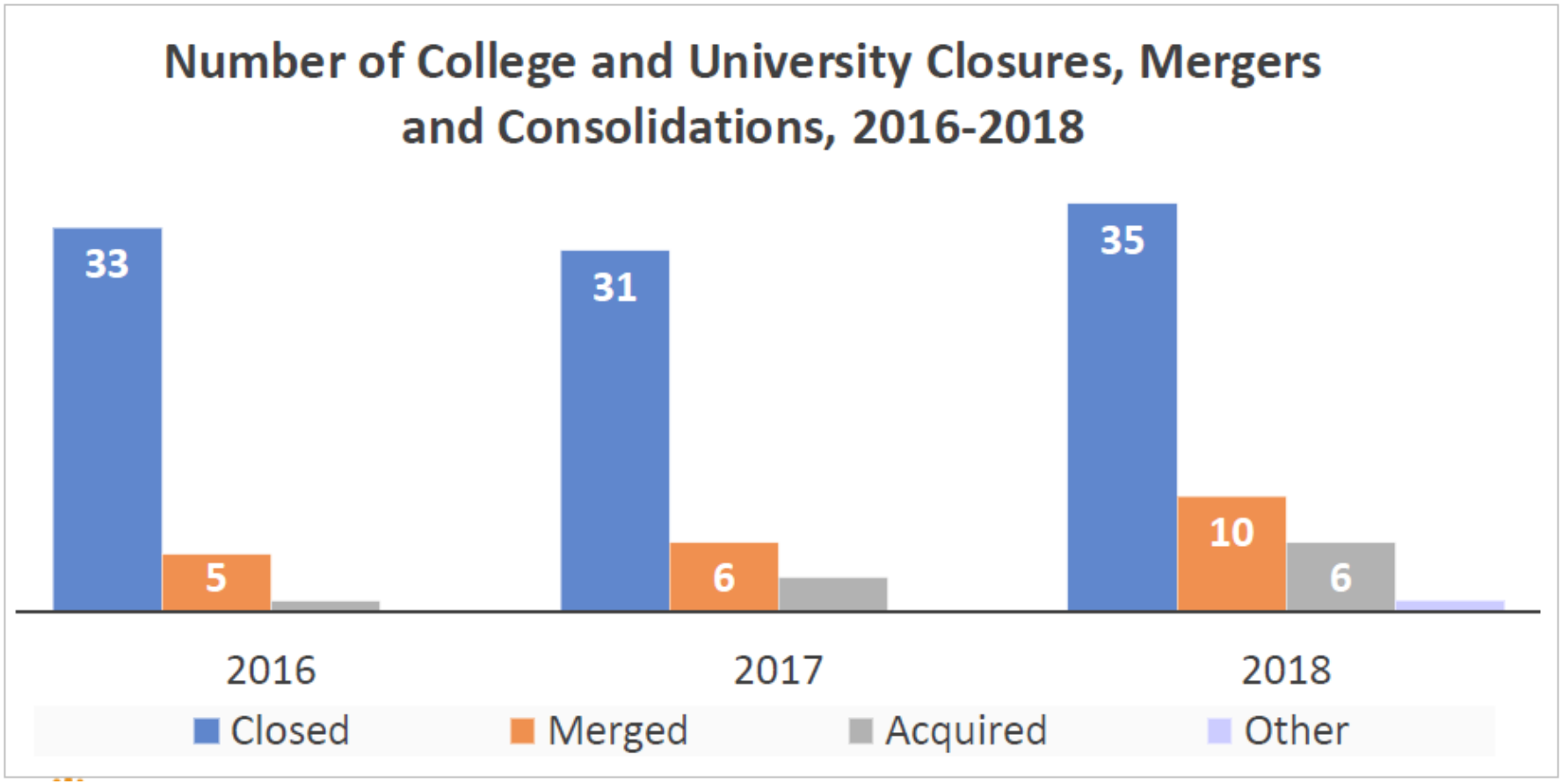
Average Institutional Discount Rates Continue to Climb, Especially for Freshmen

Average institutional tuition discount rate at four-year private, nonprofit institutions by student category, academic years 2008-2019



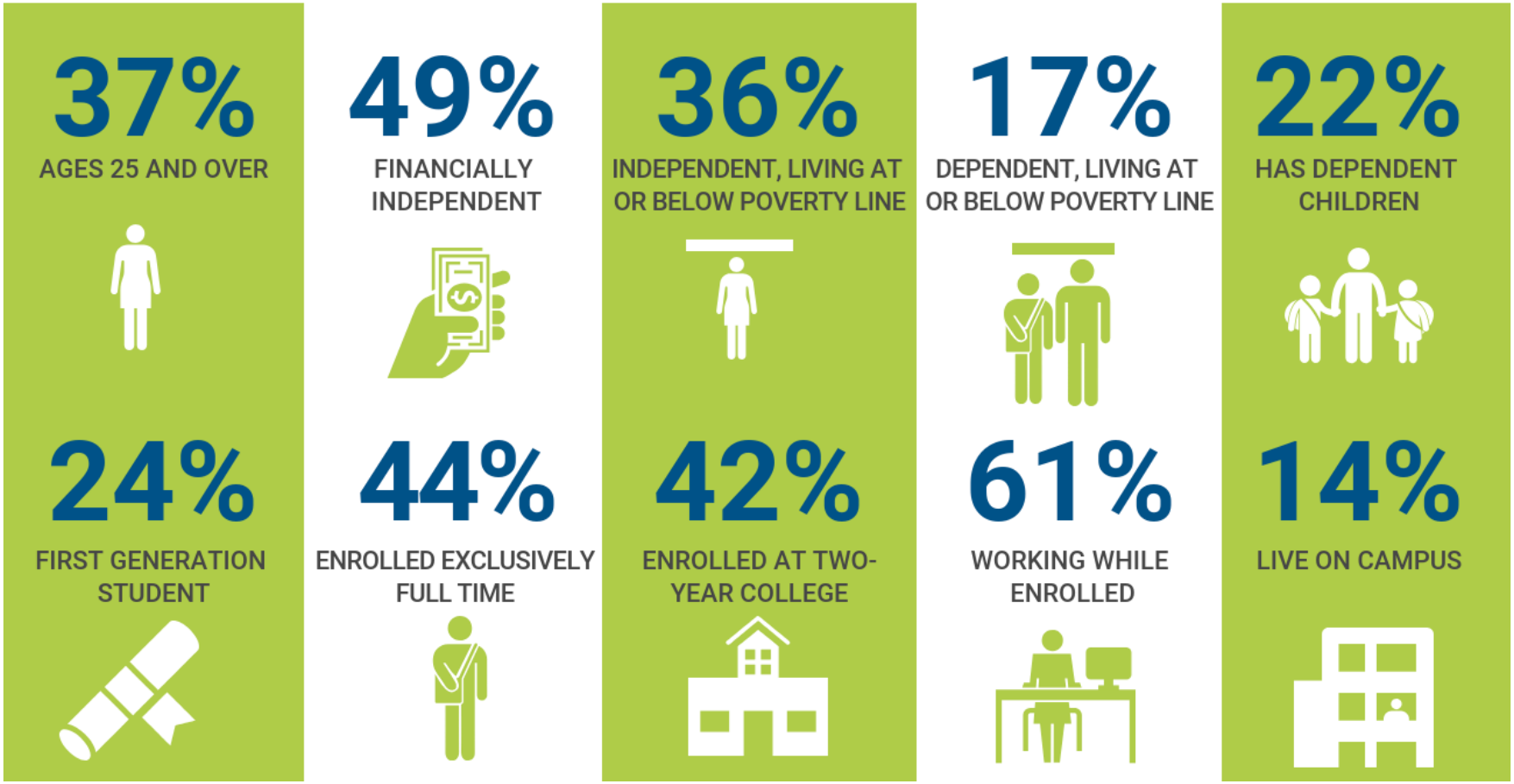
***Note:** Preliminary estimate

Source: *"2018 NACUBO Tuition Discounting Study,"* National Association of College and University Business Officers, 2019.



Source: EDUCATION DIVE and UPCEA

Profile of Today's Post-Traditional Learner

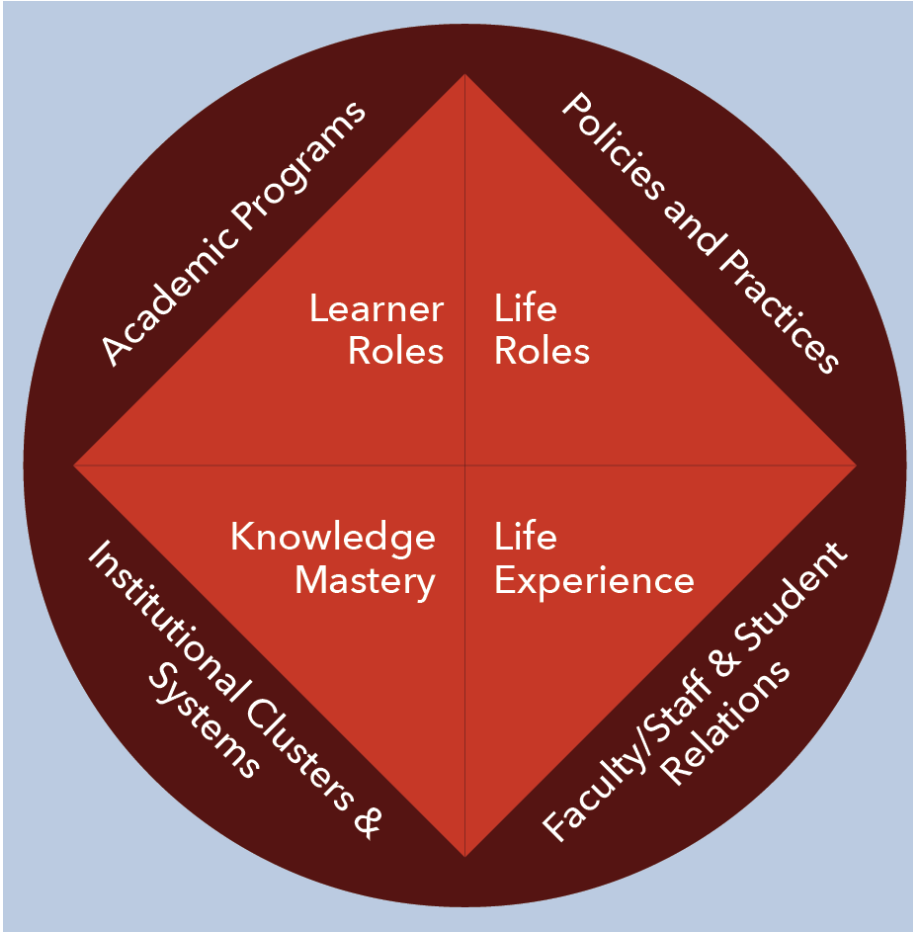


U.S. Department of Education, National Postsecondary Student Aid Study, 2016

Post-Traditional Learner Identity

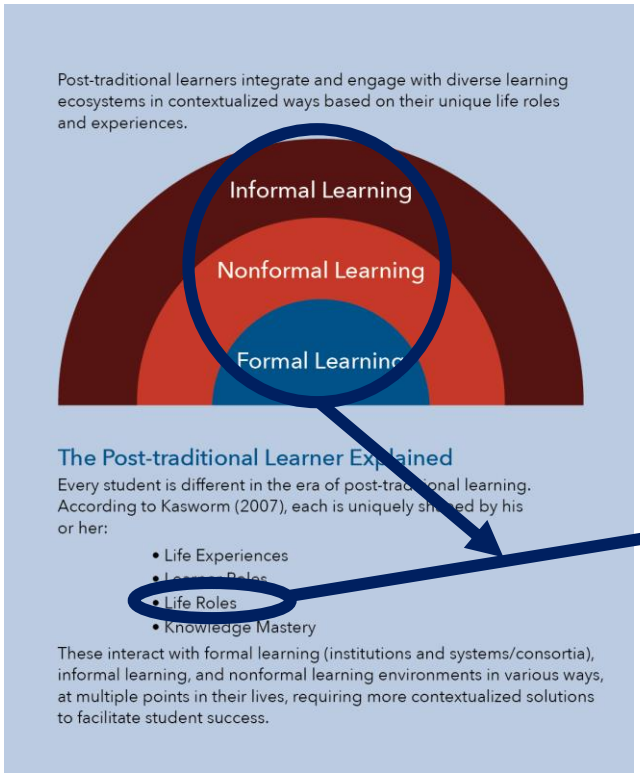
TIFFANY M.

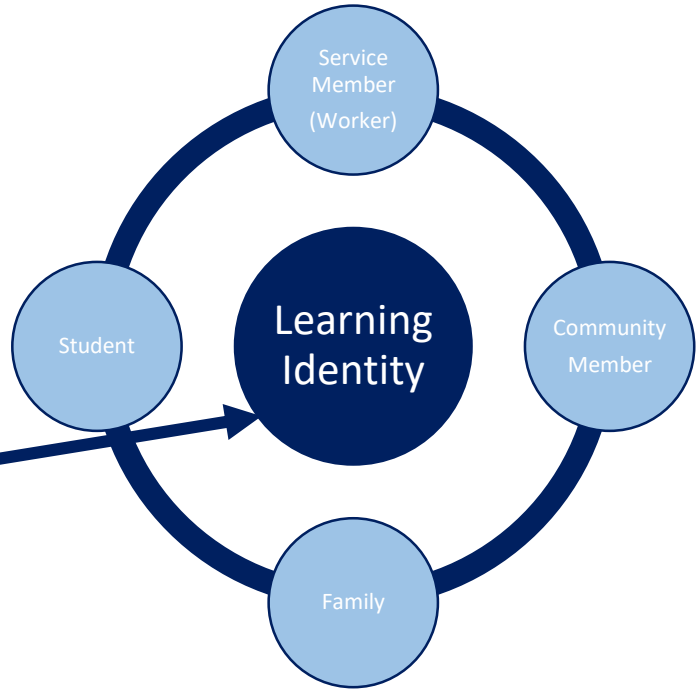
- 31 Years Old
- 11 years of PSE
- Six colleges and universities
- $29,000 in debt
- 5 repeated Gen Ed courses
- Worked Full-time 9 of 11 years

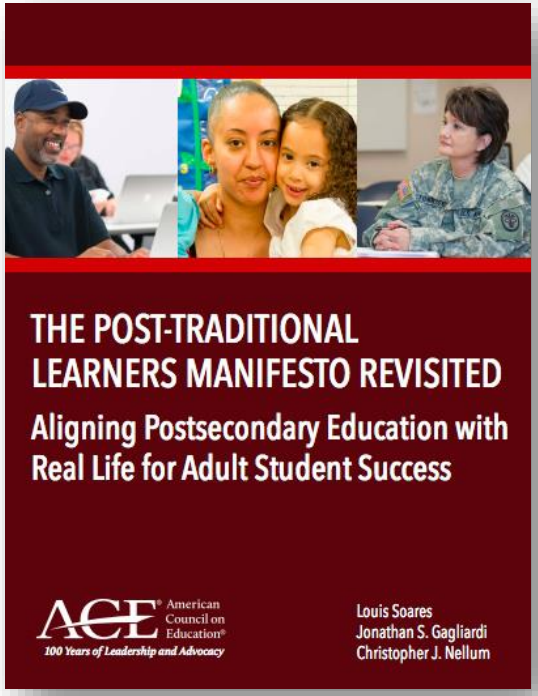


Source: Kasworm, Carol. 2007. "Adult Undergraduate Student Identity: A Proposed Model." Paper presented at the American Educational Research Association, Chicago, IL.

Learning Ecosystems and Optimizing Human Capital







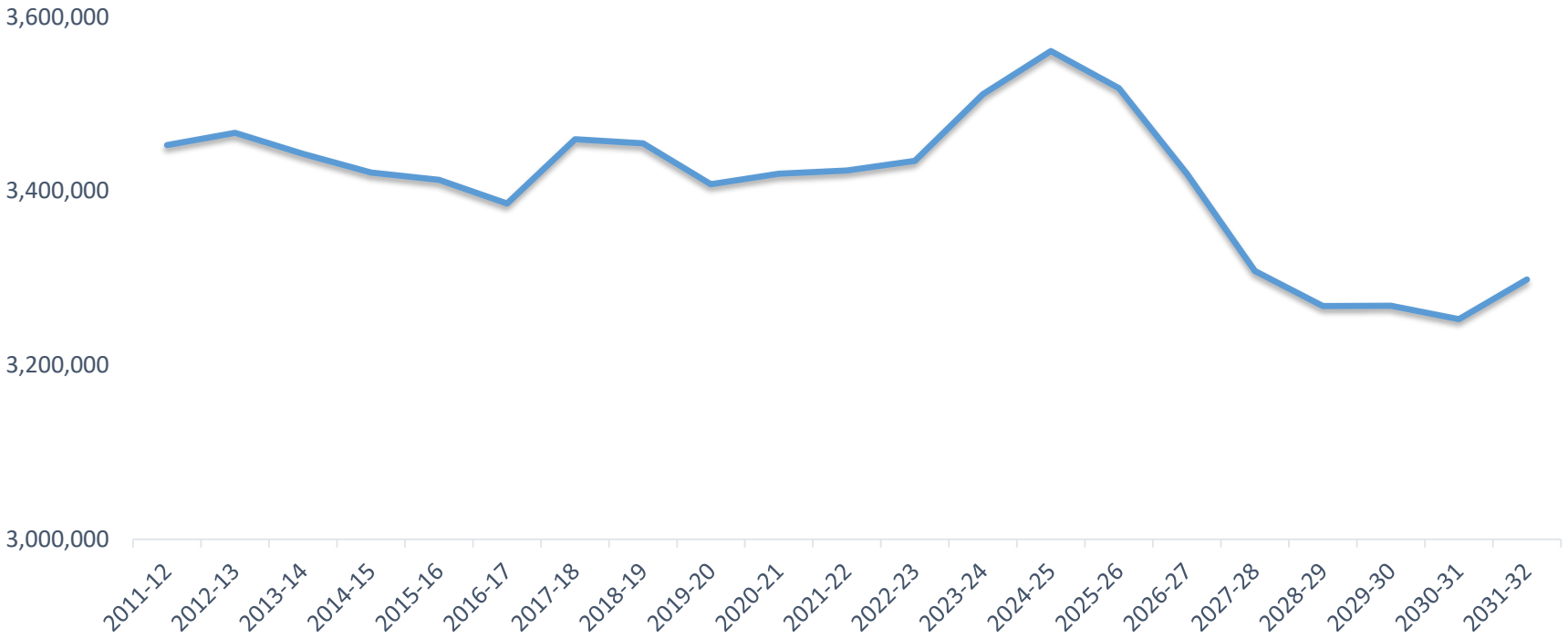
Post-traditional Learner Commonalities:

- Are needed wage earners for themselves and their families
- Combine work and learning with family/community responsibilities
- Pursue knowledge, skills and credentials that employers will recognize
- Require developmental education to be successful in college
- Seek academic/career advising to navigate their complex path to a degree

To be Successful Post-traditional Learners need:

- Modular, easy-to-access instruction
- Blended academic and occupational curricula
- Progressive credentialing of knowledge and skills (sub-degree level)
- Financial, academic, and career advising
- Public policy that supports task of balancing life, work, and education.

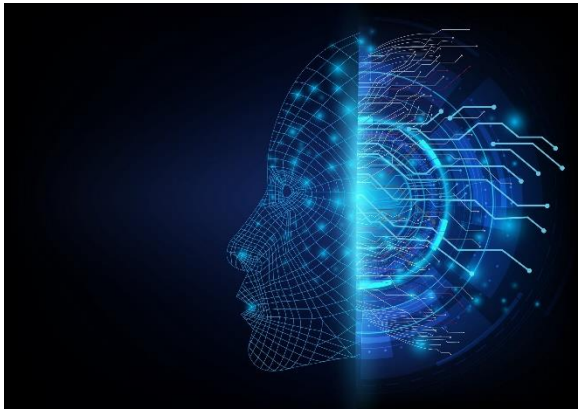
Projected Drop in Traditional College-Going Age



Forecasted number of high school graduates by year of high school graduation, 2011 to 2032

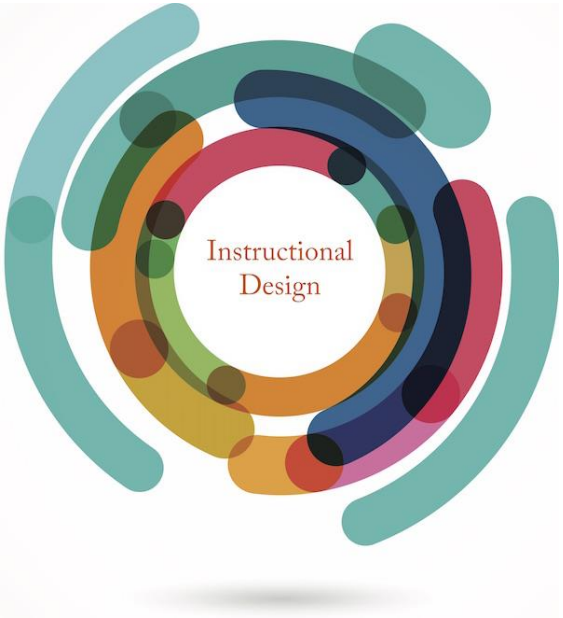
Source: Calculations based on Western Interstate Commission for Higher Education (2016)

Technology

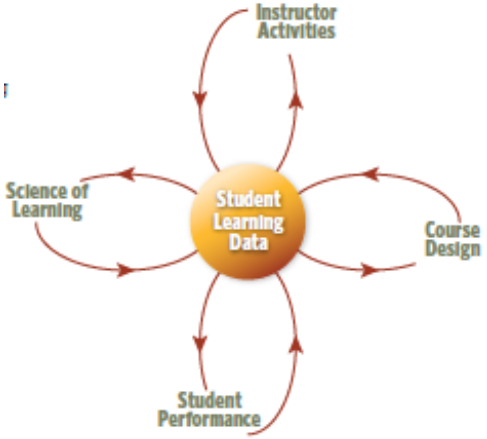


Artificial Intelligence

VR/Simulation



Education Analytics



Adaptive Learning

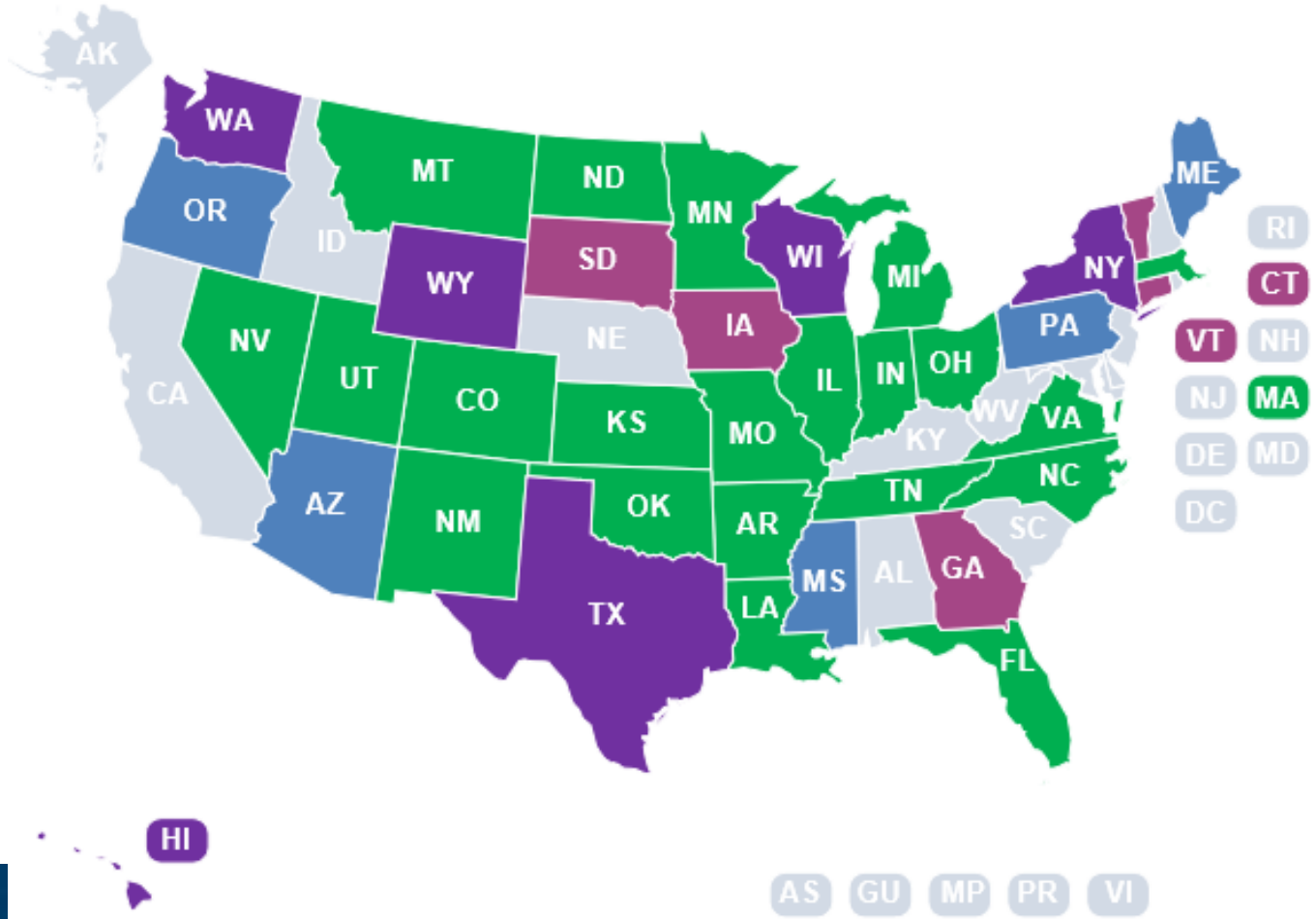
Performance Based Funding

In place at two-year institutions

In place at four-year institutions

In place at two-year and four-year institutions

In transition



Pressures on Higher Education

More Students

Fewer are Traditional

More Diversity in Learning Needs

Quality in Question

Pressure for Accountability

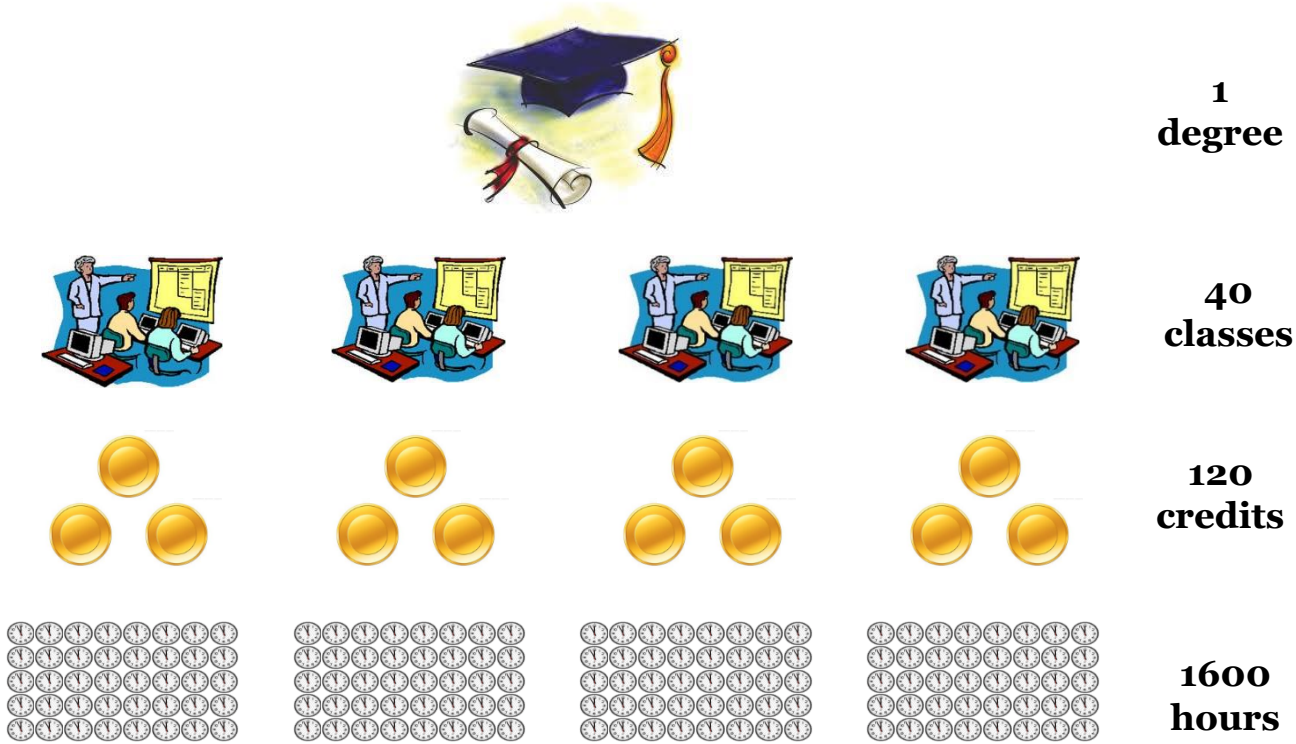
Less Money

INNOVATION IS IN ORDER

Higher Education Meta-Themes

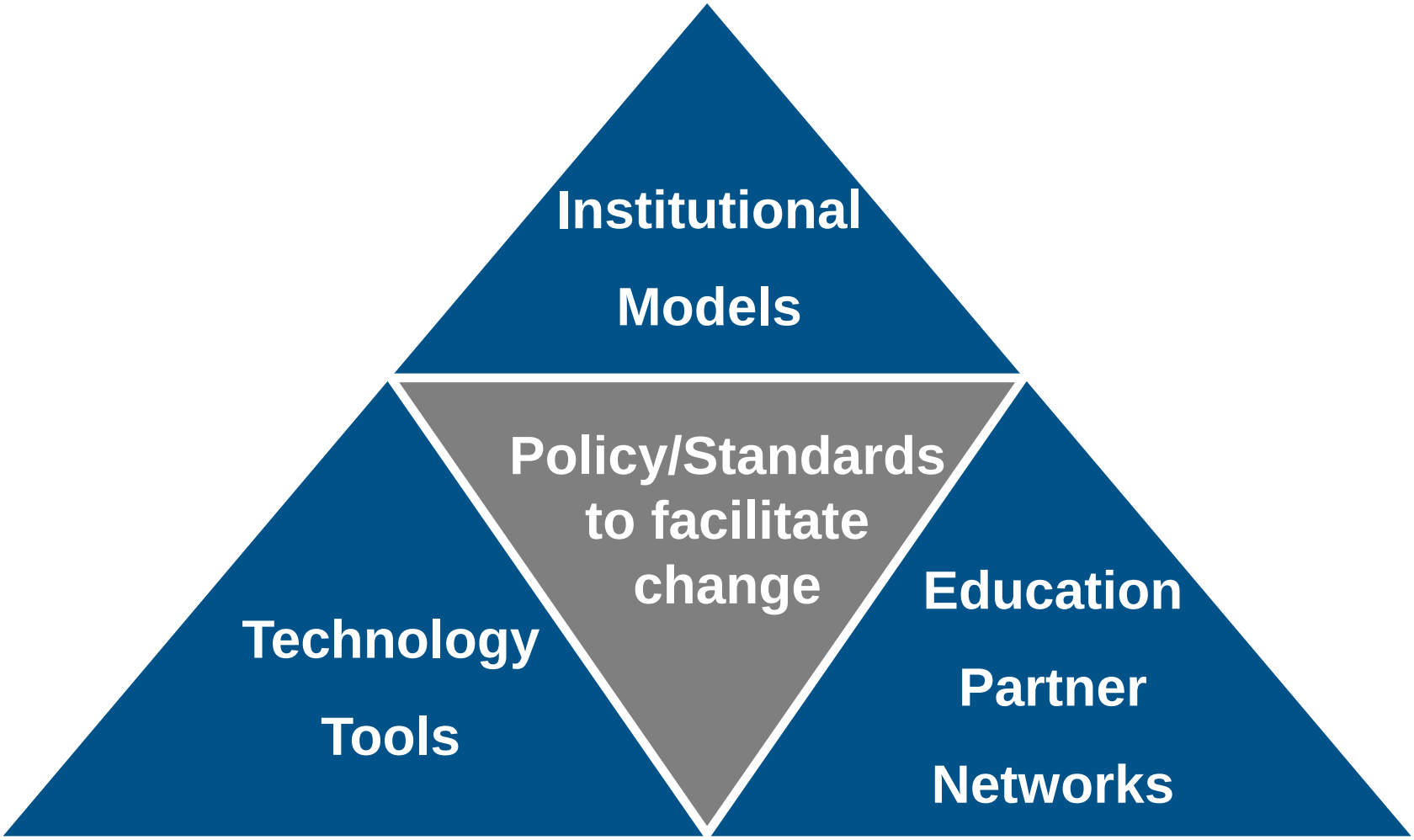
Now	Future
Learning Stocks	Learning Flows
Data Poor	Data Rich
Inputs	Output
Less organized	More (and Less) Organized
Academic v. Professional Prep	Academic & Professional Prep
Institution view	System view

From Courses and Credits, too…..

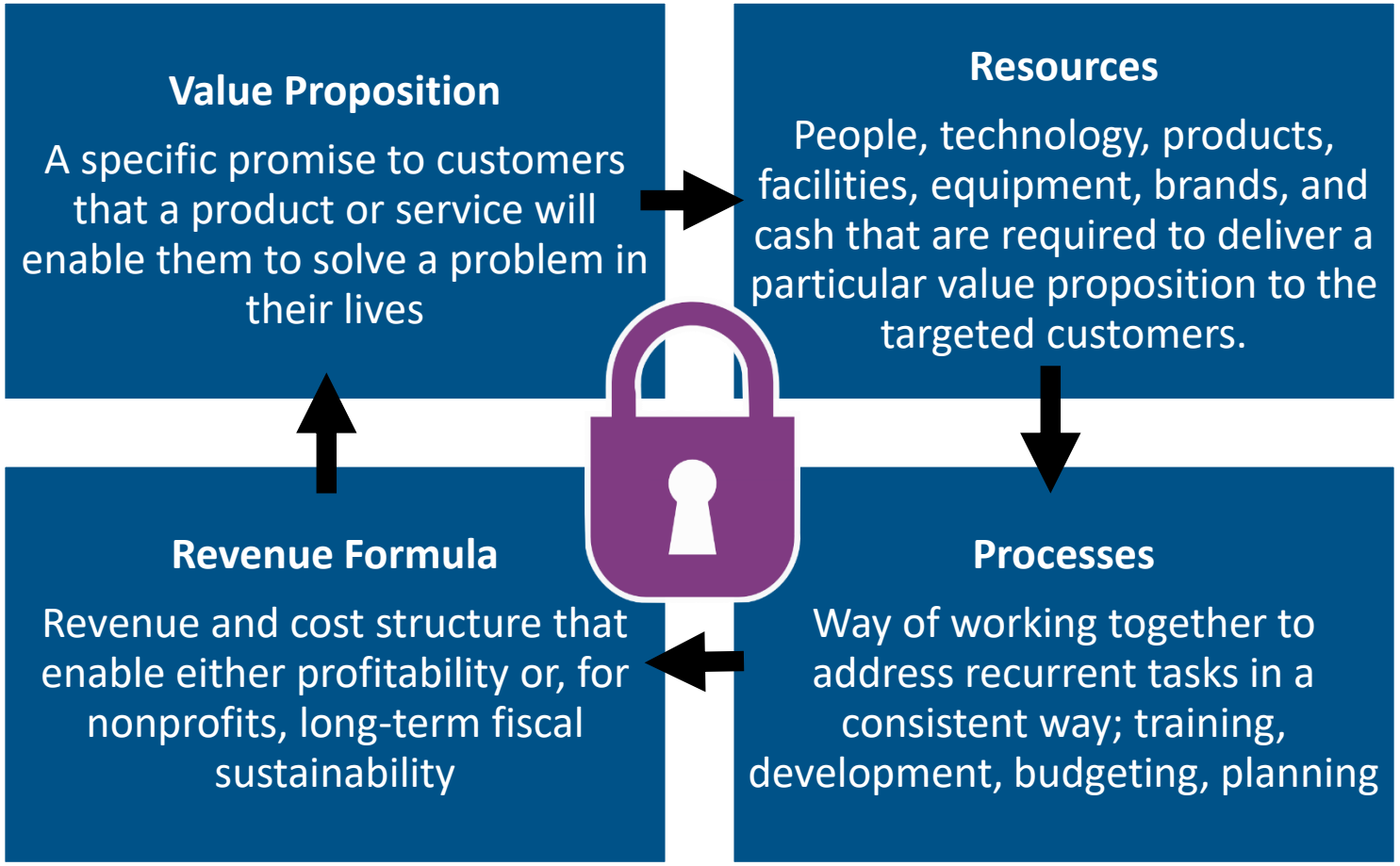


Source: Cracking the Credit Hour, New America Foundation.

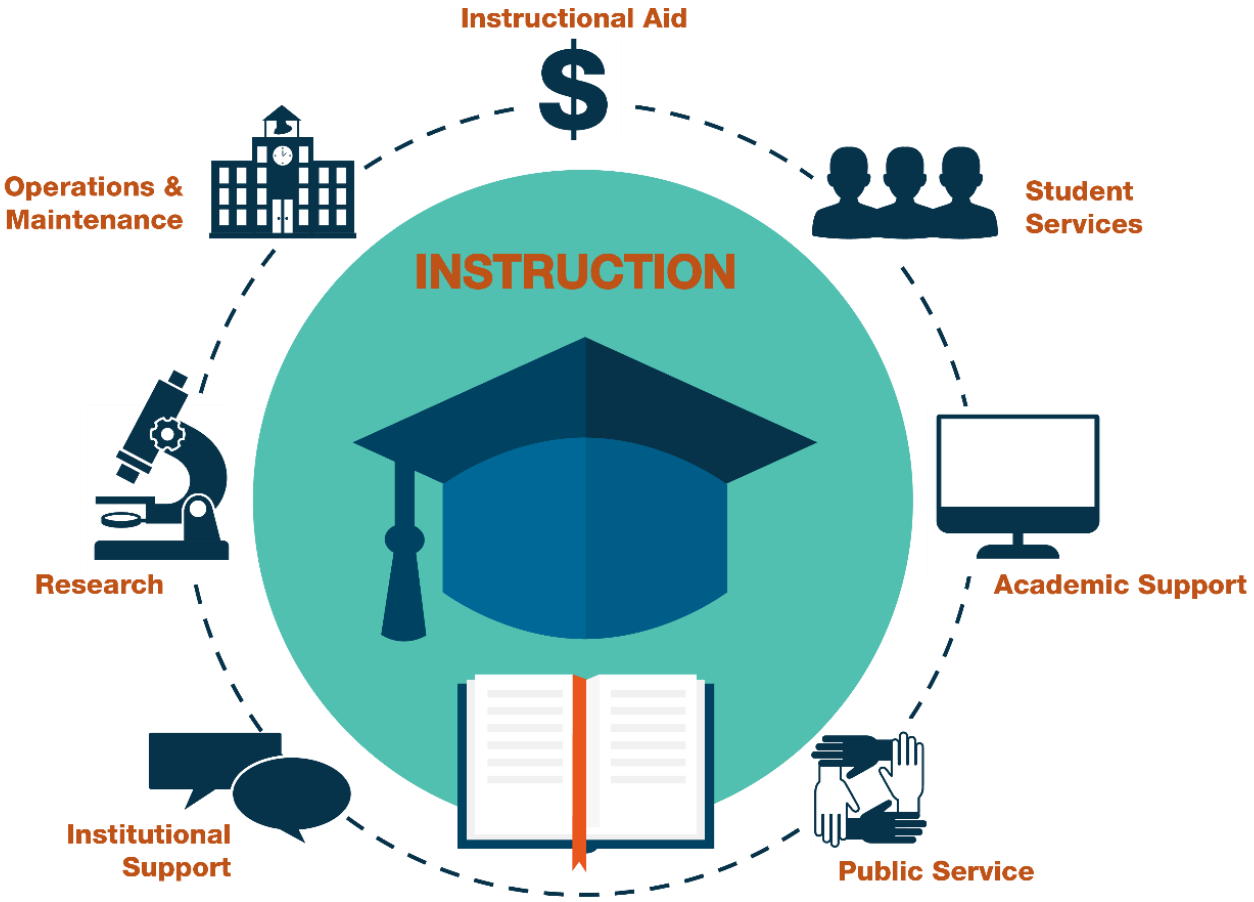
Framework for Postsecondary Innovation



Innovate What? Business Model



Resources/Processes: Institutional Expense Categories



STUDENT SEGMENTS

ACADEMICALLY FOCUSED STUDENTS

- Commonly referred to as the "traditional student" (18–24 years old)
- Academically driven and impressive academic profile
- Have family support, emotionally and financially, while attending college
- Highly focused, with after-college plans

Example:
Helga is a traditional-aged student who completed 24 college credits while in high school. She is a legacy at California State University, with intentions of enrolling in graduate school immediately after undergrad.

EXPLORING STUDENTS

- Traditional aged (18–24 years old)
- No clear focus, but also no sense of urgency to "figure it all out"
- Not as academically driven
- View college as more about the experience, social life, and opportunity to explore various activities

Example:
Alfred is a 20-year-old college student. He is undecided about his goals, and believes he has time to cruise. While he is not wealthy, money is not a concern. He is enjoying college and not in a hurry to finish his studies. After two years of enrollment, he has yet to declare a major. His family is starting to express concerns for his future.

FIELD TRANSITIONERS

- Have the goal of starting a career in a completely different field
- May be currently working or unemployed
- Often in a financially challenged situation
- Places high value on job placement rates and industry relationships when exploring institutions

Example:
Over the past few years, Anita has held several different jobs at local factories. Currently unemployed after her most recent factory employer shutdown, she recognizes the need to find another field. Anita has always been interested in technology, but needs to quickly get the skills required to be successful while keeping her very limited budget in mind.

FAST-TRACKERS

- Focus on advancing in their current industry
- Typically working adults with busy schedules
- Have some prior college experience
- Seek institutions that offer credit for past academic experience as well as work experience

Example:
Harriet is 47 and is ready to advance at work. She has been there for eight years and had one promotion. She has some college experience and believes her work experiences should count toward earning a degree. Between her family demands and work commitments, schedule flexibility is a critical consideration for her.

CAREER-FOCUSED STUDENTS

- Think practically and view college as a means to an end
- Have a major in mind and is highly job oriented
- Seek to enroll at an institution that can help them reach their ideal career position in the shortest time possible
- Take cost into consideration

Example:
Alex is 19 years old and goal-oriented. He wants a direct link from his education to a career. He does not have much money for school, so he needs to be on a fast track that results in rapid employment upon completion.

ACADEMICALLY RESILIENT STUDENTS

- Highly motivated, traditional aged (18–24 years old)
- Have a stellar academic record
- Often considered marginalized and many have experienced stressful life events and/or conditions that place them at risk of poor performance
- Have little, if any, financial support to attend college
- Generally lack social capital to aid in navigating higher education systems

Example:
In spite of living in a community faced with poverty, vestiges of segregation, and a mediocre school system, Alicia has excelled beyond expectation and graduated from high school with a 4.4 GPA and 6 college credits. While Alicia's family loves and believes in her, they cannot provide her with any financial support. She would be the first in her family to attend a postsecondary institution.

"FIGURING IT OUT" STUDENTS

- Attends college later in life but, like Exploring Students, believes college will provide needed life direction
- Likely to be unemployed or have low incomes
- Place little emphasis on their academic performance
- Do not have high expectations for institutions nor expect that they will complete a degree

Example:
Jonathan is 36 years old and has never been focused on academics. Unemployed for two years, he picks up odd jobs here and there. He believes getting a college degree will help him to land a good job, but doesn't really have a clear career in mind. He hopes that college will help him to get direction and employment.

ENCORE STUDENTS

- Attend college later in life, often after having retired from a career
- May have some college experience
- Fall generally into two categories: (1) those interested in personal enrichment or (2) those seeking to earn credits towards degree to start a second (or "encore") career

Example:
Mary is 72 years old, and has always wanted to attend college. She retired at 70 after a successful career at a postal facility, starting as a clerk and working up to a regional supervisor. Now that she is retired, she would like to consider getting a degree, but wants to start with just taking a few courses at the local university.

Adapted from: Ladd, Haven, Seth Reynolds, and Jeffrey J. Selingo. 2014. *The Differentiated University: Recognizing the Diverse Needs of Today's Students.* Boston, MA: The Parthenon Group.

College 1?

THE RESURRECTION PROJECT
Building Relationships! Creating Healthy Communities!

A Dorm for All Colleges

The New York Times **November 4, 2012**

La Casa
Live.Learn.Thrive.

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College 2?

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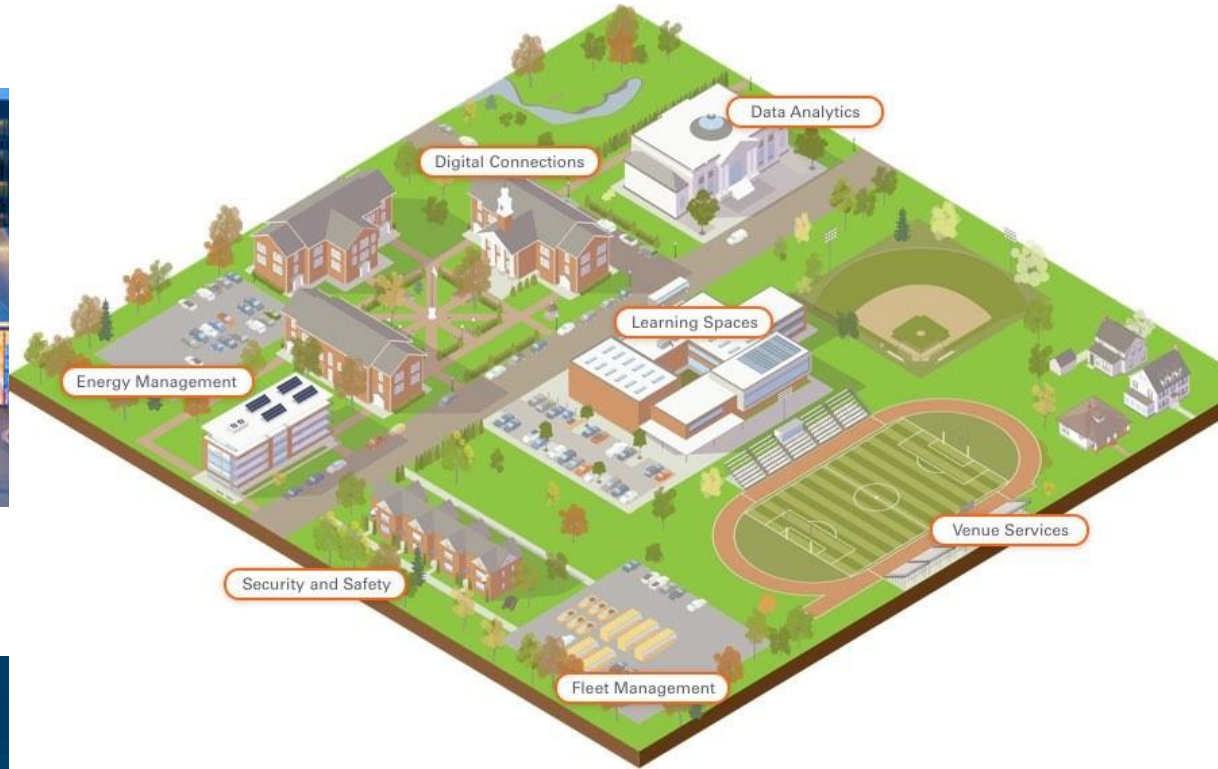
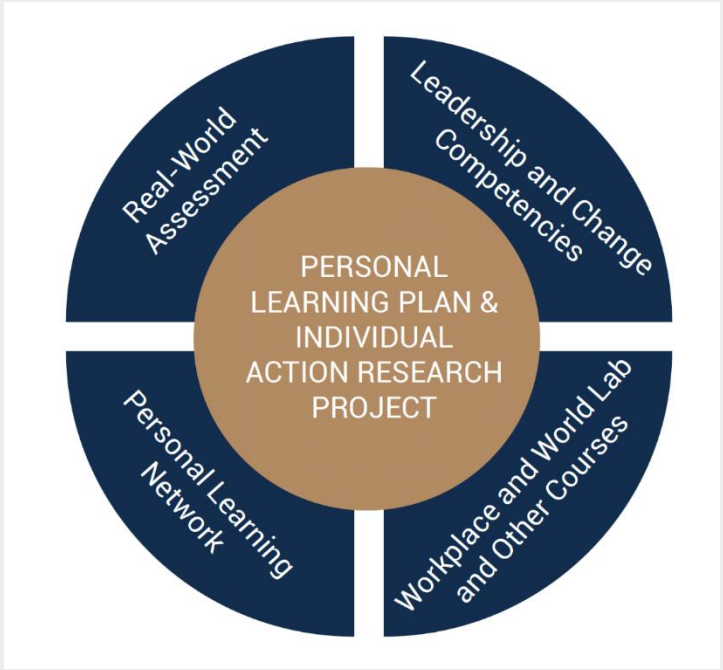


College 3?

COLLEGE UNBOUND



LIFE/COHORT BASED

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The Rise of Alternative Credentials

Digital badges
are online representations of skills learned by students, typically with visual iconography.

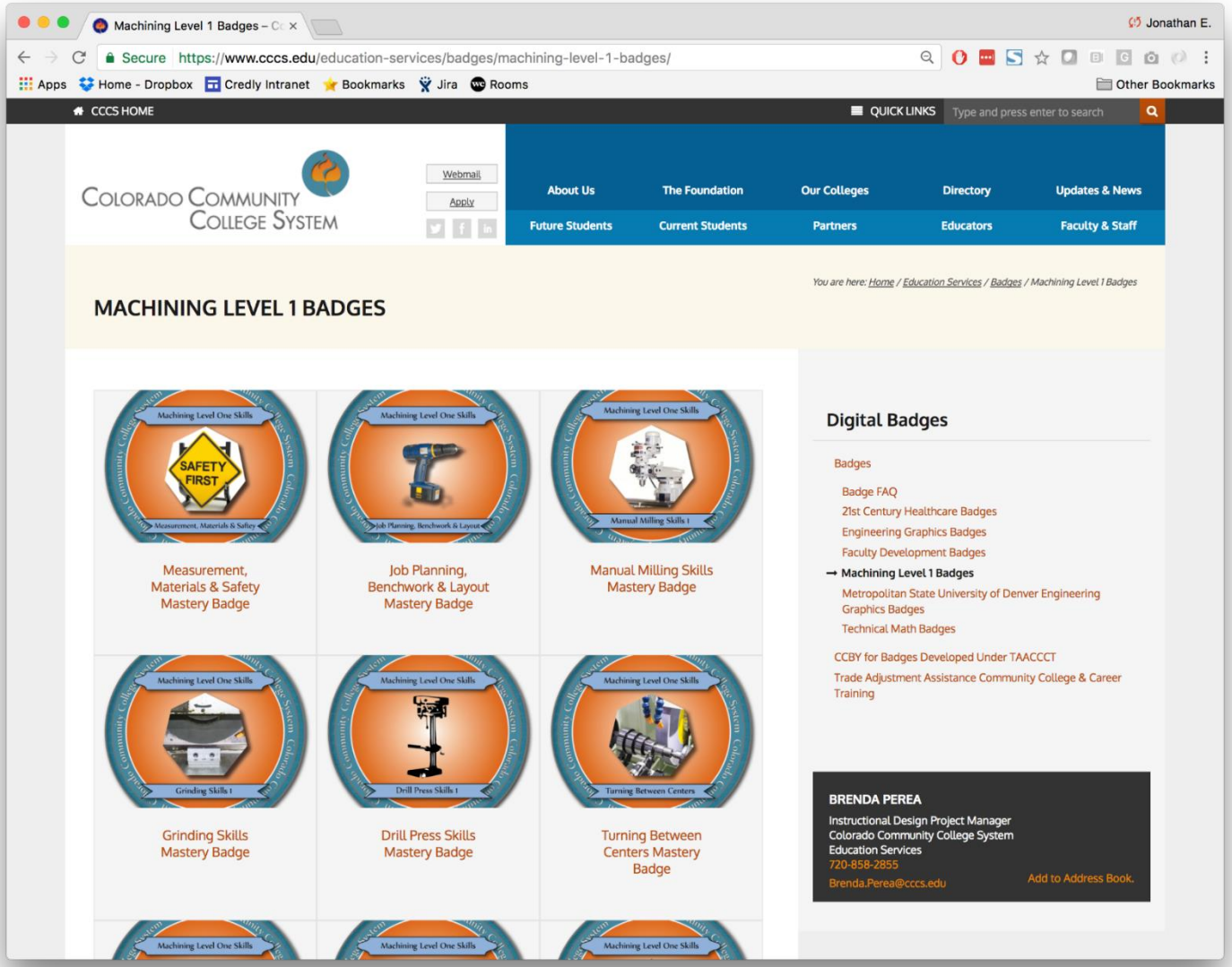
Certificates
are credentials typically issued by educational institutions to students who have completed significant programs of study that do not culminate in a degree.

Micro-credentials
are granular, digitally presented certifications offering evidence that an individual has mastered a specific skill or area of knowledge, with links to detailed criteria, endorsements, or demonstrations of their learning.

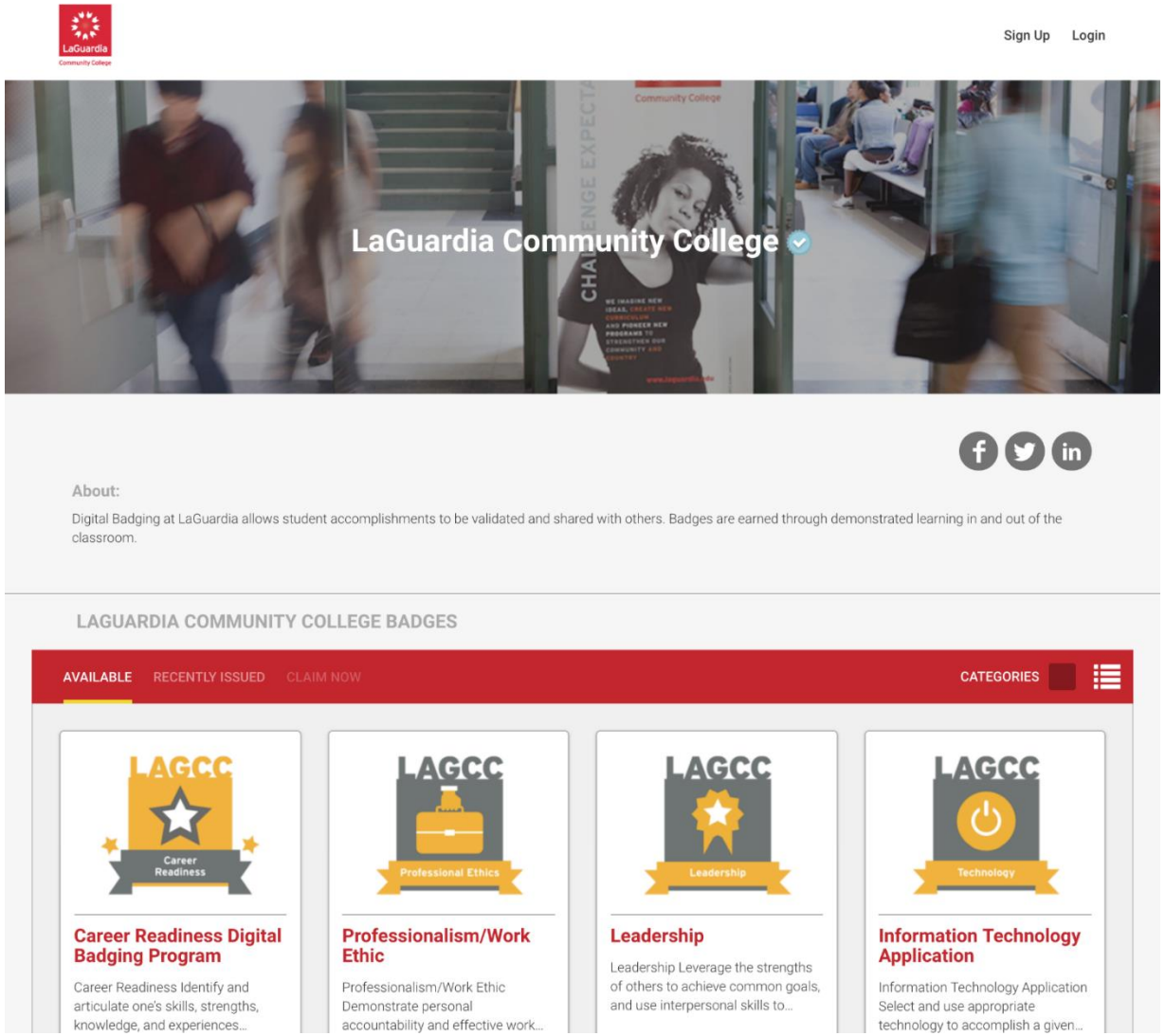
Source: University Professional and Continuing Education Association, 2019

Alternative Credential Providers

Alternative Credentials 1



Alternative Credentials 2



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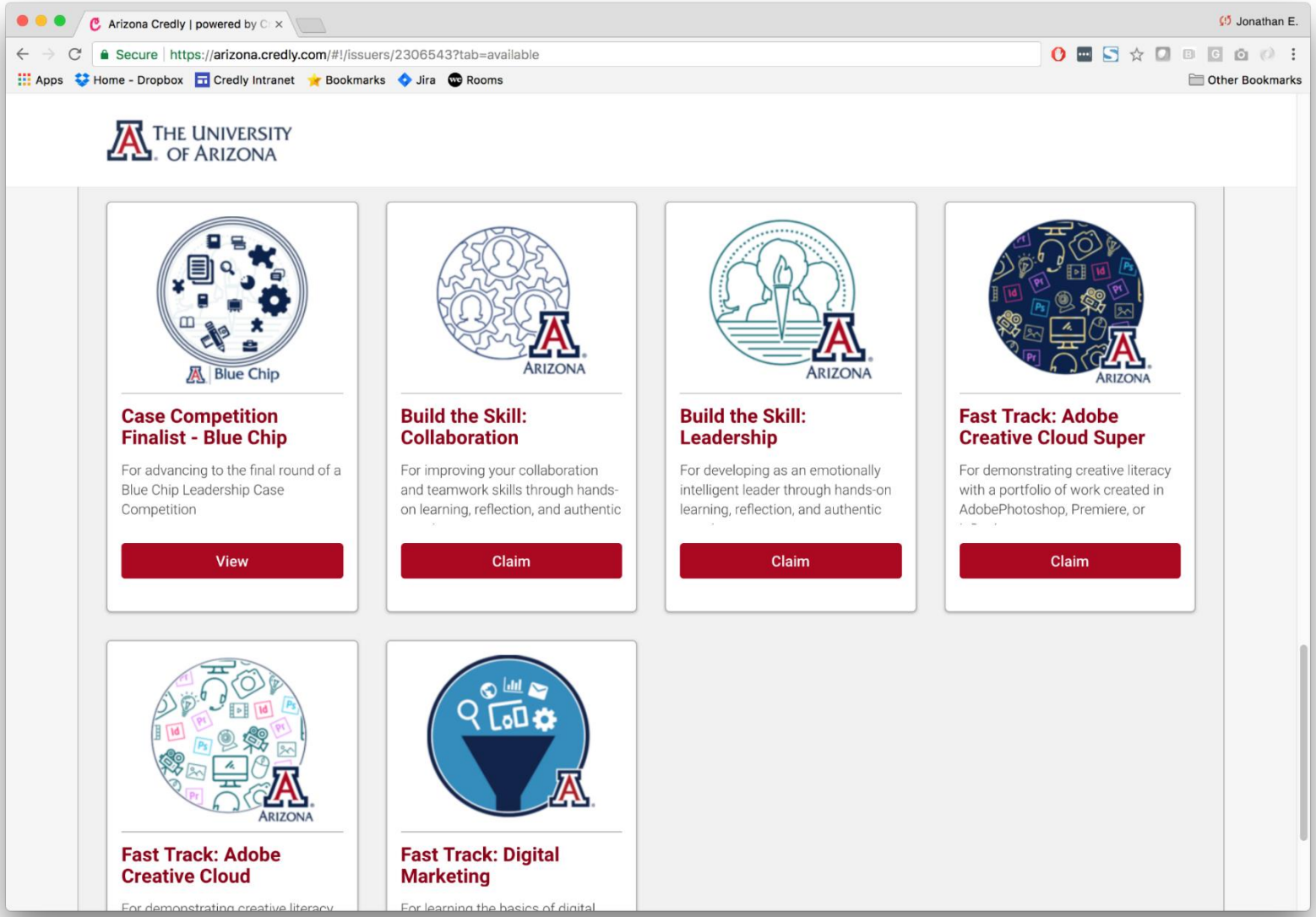

21st Century Higher Education System Characteristics

- Learner Centered
- Technology Enabled (learning and management)
- Faculty guided and curated
- Intentionally geared to career and life success
- Provide stackable recognized credentials based on competence
- Incorporate non-collegiate e.g. apprenticeship
- Eliminate “transfer tax”
- Different “models” for different institutional missions

THANKS

Looking Forward to the Discussion!