

## The External Environment for Higher Education: Fall 2016

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Rollins College President Grant Cornwell and Board of Trustees Chair Allan Keen recently wrote that “the nation and the world are in difficult, turbulent, and all too violent times.”<sup>1</sup> Alertness to changes in the external environment at the global, national, regional, and local levels can better position Rollins to meet the challenges of educating students for global citizenship and responsible leadership through liberal learning. As the Association of American Colleges and Universities (AAC&U) Board of Directors noted, “To regain our position as a world leader, the United States (U.S.) must work both to increase degree attainment and to improve significantly the breadth, level, and quality of students’ actual learning.”<sup>2</sup> This external scan is intended to inform strategic planning efforts now underway for the College.

### Summary

This external scan identifies 10 factors consistent with traditionally accepted standards for college planning initiatives.<sup>3</sup> A brief summary of these factors is provided below; detailed information for each topic appears in subsequent sections of the report.

- The value of a liberal education in preparing students to succeed in the global economy is being emphasized by employers and critical voices in higher education.
- During the next decade, higher education enrollments will continue to slow, with non-Caucasian and non-traditional student populations providing the only enrollment increases.
- The U.S. economy is likely to remain anemic, making budget and financial concerns dominant in higher education discussions.
- Legislatively directed Federal and state support are anticipated to remain austere and a critical issue for higher education.
- Institutional effectiveness, including assessment, accreditation, and continuous improvement, will remain of intense interest to all higher education stakeholders.
- Student success, retention, and degree completion will continue to receive increased attention from the same constituencies mentioned above.
- Continued expansion of the global economy, particularly emerging markets in China, India, and Latin America, is expected to increase the demand for globally competent talent.
- Exponentially increasing technology use and innovation will have a significant impact on teaching methodologies and delivery, campus administration, and student and alumni services.
- Employers, parents, and lawmakers will expect colleges to do more to assure that degrees lead to jobs, making career development initiatives a priority for many institutions, particularly liberal arts institutions.
- Institutions of higher education will place increased attention on contending with their historical role in helping society to find answers to pressing social issues.

## 1. The Value of Liberal Education

A recent AAC&U/Hart Research Associates national survey of more than 300 employers found that 74% of participating business and nonprofit leaders stated that they would recommend a 21<sup>st</sup>-century liberal education as the best way to prepare for long-term professional success in today's global economy.<sup>4</sup> Nearly all survey participants, 93%, reported that “a demonstrated capacity to think critically, communicate clearly, and solve complex problems”—the foundations of liberal education—were “more important than [a candidate's] undergraduate major.”<sup>5</sup>

- In his 2015 book *In Defense of a Liberal Education*, CNN host Fareed Zakaria made a poignant case for a renewed commitment to liberal education, an education that he contended opens the mind, prepares one for a rapidly changing world, and builds a capacity for freedom.<sup>6</sup> According to Zakaria, liberal education and its “broad focus on a range of subjects, rather than on career or vocational skills ... will prepare young people for the future.”<sup>7</sup>
- Michael S. Roth, president of Wesleyan University, argued in his 2014 work *Beyond the University, Why Liberal Education Matters* that liberal education is now more important than ever. In a National Public Radio (NPR) interview he noted that “shifts in the economy mean technological change will only produce accelerated pace of innovation, of changing relations to audiences. A broad, wide-ranging education is the best way to be able to shape that change ...”<sup>8</sup>
- Writing in AAC&U's *Liberal Education*, Martha Nussbaum, University of Chicago Law School Ernst Freund Distinguished Service Professor of Law and Ethics argued, “The idea of liberal education is more important than ever in our interdependent world. An education based on the idea of an inclusive global citizenship and on the possibilities of the compassionate imagination has the potential to transcend divisions created by distance, cultural difference, and mistrust.”<sup>9</sup>
- Edward J. Ray, president of Oregon State University, an economist by training, and member of AAC&U's President's Trust, noted that “in today's world of changing demographics, 24/7 news cycles and a global marketplace, the liberal arts are critical to success in every economic sector. There can be no doubt that they play an essential part in providing a foundation for learning in every professional field.”<sup>10</sup>
- According to surveys by Payscale.com, liberal arts graduates receive starting salaries similar to other college graduates, but “once they're about 15 years into their careers, they report average pay of about \$80,000 a year—\$6,000 more than college grads in general.”<sup>11</sup> This finding was echoed in an analysis completed by AAC&U, which found that “over time, liberal-arts majors often pursue graduate degrees and gravitate into high-paying fields such as general management, politics, law and sales ...”<sup>12</sup>

## 2. Changes in Student Demographics and Enrollment Trends

During the coming decade, growth in higher education enrollment is expected to slow; the growth that does occur will be from primarily non-Caucasian and non-traditional student populations, and women will continue to enroll at higher numbers than men.<sup>13</sup> Jeffrey Selingo, writing for *The Chronicle of Higher Education*, noted that “the prime spot for recruiting traditional college students over the next decade will be in the South, ... where the Class of 2025 is expected to be 16% larger than the class of 2009.” According to Selingo, three states in particular, Texas, Florida, and Georgia, will provide the majority of the growth over the next decade.<sup>14</sup>

The following projections are summarized from data provided by the National Center for Education Statistics (NCES).<sup>15</sup>

- By 2021, the overall number high school graduates will be only 2% higher than in 2008-2009.
- First-time freshman fall enrollment in all postsecondary institutions is projected to increase by only 14% overall, compared to an increase of 39% from 1996-2010.
- Enrollment in private postsecondary institutions is projected to increase by only 15% between 2010 and 2021, compared to an 81% increase between 1996 and 2010.
- Postsecondary enrollment projections by race/ethnicity show dramatic shifts from 2010 to 2021, including a:
  - 4% increase in Caucasian students,
  - 25% increase in African-American students,
  - 42% increase in Hispanic students,
  - 20% increase in Asian/Pacific Islander students, and
  - 1% increase in American Indian/Alaska Native students.<sup>16</sup>
- The age distribution of enrolled students will change dramatically in the next decade. The projected increase in postsecondary enrollments for students 18 to 24 years old will decline by more than 40% between 2010 and 2021, from a 52% increase between 1996 and 2010, to only a 10% increase in the next 10 years. A 15% decline in postsecondary enrollments is anticipated for students 25 to 34 years old, where enrollment increases will decline from 45% between 1996 and 2010, to a projected 20% between 2010 and 2021. Enrollments of students 35 years old and over will change the least, only 7%, from an increase of 32% between 1996 and 2010, to a projected increase of 25% between 2010 and 2021.

### 3. The U.S. Economy, Costs, and Affordability

Higher education discussions will remain dominated by economic concerns surrounding affordability and student debt, cost of attendance, state and Federal funding, and student return on investment.<sup>17</sup>

- While the Great Recession has ended and signs of economic improvement are evident, signals of continued recessionary trends remain, with little consensus across the literature regarding when or how a full economic recovery will occur.<sup>18</sup> While Moody's Investors Service issued a "stable outlook" for the U.S. higher education sector in December 2015,<sup>19</sup> by April 2016, Citigroup North America lowered previous economic forecasts for the U.S. through 2017, citing continued uncertainty and slow growth.<sup>20</sup>
- The Boston Consulting Group (BCG) noted recently that higher education institutions "are navigating a challenging economic environment. Revenues from enrollment, government, and other sources have fallen, leading many institutions to raise tuition to unsustainable levels and putting a number of the weakest schools at risk."<sup>21</sup>
- The economic climate and affordability concerns will continue to impact college selection decisions. The 2016 *College Affordability Diagnosis* reported that even in the best-performing states, college is less affordable now than in 2008.<sup>22</sup> A 2009 study by Longmire and Company found that more than half of participating families responded that college plans had changed "dramatically" or "somewhat" due to economic conditions, with New England and the South reporting dramatic levels of change most frequently.<sup>23</sup>

- The value proposition of higher education and student debt are, and will continue to be, in the forefront of higher education affordability discussions. Since 2014, three attempts to advance Federal legislation providing student loan relief failed in Congress.<sup>24</sup> *The Wall Street Journal* reported in April 2016 that “43% of the roughly 22 million Americans with Federal student loans weren’t making payments as of Jan. 1,” and a staggering “1 in 6 borrowers, or 3.6 million, were in default on \$56 billion in student debt.”<sup>25</sup>

#### 4. Political Pressures

Legislatively directed Federal and state support are anticipated to remain austere and a critical issue for higher education in the decade ahead. The American Association of State Colleges and Universities (AASCU) described the climate as a “blend of tepid optimism and restrained anxiety.”<sup>26</sup> Despite waning levels of support, policymakers’ attention to issues of degree production, college readiness, retention and completion rates, enrollment capacity, tuition prices and policy, student aid, data system development, and job creation/workforce development are expected to intensify,<sup>27,28</sup> as will the number of Federal and state reporting requirements and the cost of adherence to those regulations.<sup>29</sup> The top 10 political policy issues reported by AASCU for 2015-2016 were:<sup>30</sup>

- tuition policy and state government-provided operating support;
- state appropriations for higher education, expected to be lower than those of 2014-2015;
- campus sexual assault prevention, reporting, and adjudication;
- access and success for members of the U.S. Armed Forces, especially veterans;
- legislation to extend state financial aid to undocumented students;
- likely reintroduction in many states of legislation mandating that individuals be allowed to carry guns on campus and renewed efforts by pro-gun organizations, including those in Florida, to overturn campus bans on guns;
- alignment of secondary-postsecondary education standards and learning objectives;
- ongoing adjustments to states’ student aid program overall funding levels, blend of financial need and academic merit components, and students’ eligibility for state grants;
- continued shifts from enrollment- to performance-based funding (PBF) models for public colleges and universities; and
- no-cost tuition for new high school graduates in pursuing degrees at state community or technical colleges, e.g., the “Tennessee Promise” program.

#### 5. Assessment of Student Learning, Quality, and Institutional Effectiveness

Institutional effectiveness and quality in higher education and its components—assessment, accreditation, accountability, and continuous improvement—will continue to be concerns for U.S. higher education stakeholders.<sup>31</sup> According to a 2016 National Institute for Learning Outcomes Assessment (NILOA) policy statement, “Virtually everyone agrees that what students learn in college is central to subsequent success and satisfaction in life, to the nation’s economic competitiveness and productivity, and to building healthy and civically engaged communities.”<sup>32</sup> As Daniel R. Sullivan, president emeritus of the AAC&U Presidents’ Trust, wrote in summer 2016, “Deciding what we mean by quality in higher education is the most important decision we have to make as a profession and as a country. Everything follows from that. It is impossible to assess our performance, or whether higher education costs too much, if the goals for a quality college education are left unspecified.”<sup>33</sup>

- Zakiya Smith, Lumina Foundation strategy director and former Obama White House education policy official, noted at a summer 2016 conference of liberal arts educators that both the last

Bush administration and the Obama administration shared an interest in measuring student success—an interest that will not go away. Colleges should, she added, think about “how we make a difference.”<sup>34</sup>

- Given increased calls for a culture of evidence, assessment as a measure of the educational impact of an institution on its students has become central to the purpose of educational organizations.<sup>35</sup> J. Fredricks Volkwein, professor emeritus at Pennsylvania State University’s Center for the Study of Higher education and noted scholar of institutional effectiveness, contends, “The greater the congruence between [an] institution’s educational outcomes and its mission, goals, and objectives, the stronger the evidence of the institutional effectiveness.”<sup>36</sup>
- By 2008, the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC), along with all other U.S. regional higher education accreditors, required institutions to assess institutionally determined outcomes and provide evidence of improvement based on analysis of results to meet institutional effectiveness standards.<sup>37</sup> A frontrunner among regional accrediting associations for assessment, SACSCOC embedded outcomes examination as a means of demonstrating instructional and learning effectiveness in 1984.<sup>38</sup>

## 6. Student Success and Retention

Student success, retention, and degree completion will remain matters of significant attention for Federal and state lawmakers, foundations, associations, and other higher education stakeholders. Students in learning environments characterized by high levels of student engagement achieved the highest four-year graduation rates, were academically more successful, were more motivated to learn and persist in college, and left college less often for academic reasons.<sup>39</sup> As Daniel F. Sullivan, president emeritus of AAC&U’s Presidents’ Trust wrote, because they “love what they are doing and value the personal educational transformation they experience ... students are inspired to become lifelong learners ... motivated to teach themselves new things ... especially the new things required by an evolving and changing workplace.”<sup>40</sup>

- An extensive body of literature has provided statistical evidence to suggest a relationship between high-impact learning practices (HIPs), persistence to degree, increased achievement, and graduation rates for college students from all backgrounds, but particularly for those traditionally underrepresented in higher education.<sup>41,42</sup> The importance of out-of-classroom experiences cannot be underestimated, and the time and energy students spend on educationally purposeful activities in college can be the best predictor of learning, personal development, and success.<sup>43</sup>
- Data from the National Survey of Student Engagement (NSSE) identified 10 HIPs that noticeably contribute to student engagement, retention, and persistence to degree: first-year seminars and experiences, common intellectual experiences, learning communities, writing-intensive courses, collaborative assignments and projects, undergraduate research, diversity/global learning, service and community-based learning, internships, and capstone courses and projects.<sup>44</sup> In 2008, George D. Kuh, Chancellor’s Professor Emeritus at Indiana University, founding director of NSSE, and director of the National Institute for Learning Outcomes Assessment (NILOA), recommended that all colleges “make it possible for every student to participate in at least two high-impact activities during his or her undergraduate program, one in the first year, and one taken later in relation to the major field.”<sup>45</sup>
- The Wabash National Study of Liberal Arts Education 2006-2009, affirmed the NSSE data and found broad categories of teaching practices and institutional conditions that had relationships to student growth and outcomes. These conceptual clusters included: good teaching and high-

quality interaction with faculty, academic challenge and high expectations, meaningful interactions with diverse peers, and higher-order, integrative, and reflective learning experiences – what NSSE studies defined previously as “deep learning.”<sup>46</sup>

## 7. Globalization

Global economic conditions will continue to change rapidly as American companies take advantage of significant growth in international markets, particularly those in emerging and developed Asia, Latin America, and the Middle East and North Africa (MENA).<sup>47</sup> As a result, the demand for globally competent talent in these and other global markets is expected to increase.<sup>48</sup> Developing countries’ strong interest in U.S. higher education will create opportunities to export and establish campuses abroad; foreign student demand for U.S. education will remain high.<sup>49</sup>

- Addressing the global talent challenge will require partnerships among corporate, government, and academic sectors nationally and internationally, with appropriate forums for collaboration, according to a recent Oxford Economics report, *Global Talent 2021*.<sup>50</sup>
- The economies of Brazil, Russia, India, and China combined are expected to overtake the economies of other established nations by 2050.<sup>51</sup> However, the International Monetary Fund (IMF) noted that the 2016 picture “for emerging markets is quite diverse, with high growth rates in China and most of emerging Asia, but severe macroeconomic conditions in Brazil, Russia, and a number of other commodity exporters.”<sup>52</sup>
- Carol Geary Schneider, president emerita of AAC&U, noted that “as a society we are not well prepared to participate in and to contribute to the emerging global community ... the majority of American students don’t know enough languages, have not been to other countries, and have not taken more than one course about another part of the world.”<sup>53</sup>
- The Institute of International Education (IIE) reported that 974,926 international students enrolled in U.S. higher education institutions during academic year 2014-2015, a 10% increase over the prior year and the highest level of growth since 1978-1979. Countries of origin for 58% of these students were China (31%), India (14%), South Korea (7%), and Saudi Arabia (6%).<sup>54</sup>

## 8. Technology

Exponentially increasing innovations in information technology will continue to have a major impact on teaching methodologies, modes of instructional delivery, campus administration, delivery of student services, and institutional capabilities to connect with alumni and stakeholders.<sup>55</sup>

- Personalized learning systems (PLSs) that mediate students’ work via software and deliver content designed to enhance learning and success are now available from many digital providers. These innovations will allow institutions of higher education to develop personalized instruction that meets learners’ individual needs, measures learning in real time, assesses outcomes, and facilitates student and instructor behavioral shifts to improve learning. These tools can also be used to track pathways to degree completion and enhance academic advising.<sup>56</sup>
- The foundation of PLSs is adaptive learning technology, “a non-linear approach to instruction and remediation, adjusting to a learner’s interactions and demonstrated performance level and subsequently anticipating what types of content and resources learners need at a specific point in time to make progress.”<sup>57</sup> Described as automated or intelligent tutoring systems, major textbook publishers are developing adaptive learning technology on accelerated schedules. For example, Pearson and Knewton are partnering to offer MyLab™ & Mastering™, while McGraw-Hill has introduced ALEKS® and Smartbook®, based on its LearnSmart® adaptive technology.<sup>58</sup>

- Learning management systems (LMSs) developed in the 1990s as part of the first wave of educational technology are now seen as cumbersome by both students and instructors. According to *Chronicle of Higher Education* writer Jeffrey Selingo, “Students are moving beyond the confines of the LMS to find their own study aids online through YouTube, Amazon, Khan Academy, or Wolfram|Alpha, among other sources.”<sup>59</sup>
- Once considered a niche-delivery channel, hybrid learning models incorporating online and blended delivery modes are now mainstream offerings.<sup>60,61</sup> Eyring and Christensen, authors of *The Innovative University: Changing the DNA of Higher Education from the Inside Out*, contend that traditional institutions of higher education have an inherent advantage in delivering blended learning—hybrid face-to-face and online experiences incorporating important on-campus student-faculty and peer-to-peer interactions, and online learning.<sup>62</sup>

## 9. Career Pathways

Given rapid changes in the world of work, employers, parents, and lawmakers will increasingly focus on higher education’s individual economic return on investment (ROI), and “how colleges prepare students to succeed in an evolving global, information economy is expected to be a subject of intense debate in the decade ahead.” Key questions will be “What are the attributes of college graduates?” and “How can colleges best provide the skillset needed to succeed?”<sup>63</sup>

- To strengthen outcomes for recent graduates, respondents to a 2012 *Chronicle of Higher Education/American Public Media Marketplace* survey on the role of higher education in career development recommended breaking down the false dichotomy of liberal arts and career development, emphasizing instead the intrinsic linkage between the two.<sup>64</sup>
- Technology connecting students to career and employment information may be a promising solution for engaging more students in the career exploration process.<sup>65</sup> Handshake, a digital career networking tool that connects college students, young alumni, and recruiters from more than 65,000 companies based on students’ personal profiles and experience, is in place at more than 110 U.S. colleges and universities, and serves more than 1.5 million college students.<sup>66</sup>
- The 2014 Gallup-Purdue University Poll of more than 29,000 U.S. college graduates, which assesses alumni perceptions of undergraduate experiences and how those experiences relate to well-being and job quality later in life, found that for graduates who had an internship or job that allowed application of classroom learning, the odds of those graduates agreeing that their education was worth the cost were increased 1.5 times, and the odds of those graduates reporting being engaged at work were increased 1.8 times.<sup>67</sup>

## 10. Social Trends

In the wake of widespread student activism surrounding racial inequality in 2015-2016, colleges and universities are expected to pay increased attention to helping society find answers to ongoing social issues. Kevin Kruger, president of NASPA: Student Affairs Administrators in Higher Education, noted that “this isn’t a new area for higher education at all, but it’s clear that more and more campuses are recognizing it’s important to try and create more opportunities for open dialogue about these issues. Most campuses understand that the protests and activism last year show that there are issues that need to be addressed.”<sup>68</sup> Key social issues for higher education institutions articulated by *Inside Higher Ed* were:

- workplace diversity;
- evolving public attitudes toward the LGBTQ community;
- efforts to achieve racial equality;

- increases in population of those aged 65 or older (16.6% by 2020);
- impact of technology and data-driven decision making on organizations;
- immigrant paths to legal status;
- challenges for human talent in organizations, e.g., engaging and empowering people, building leadership capacity, and transforming and accelerating corporate learning; and
- disparities between work expectations of Baby Boomers, Gen Xers, and Millennials.<sup>69</sup>

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## Notes

- <sup>1</sup> (Cornwell & Keen, 2016)
- <sup>2</sup> (Association of American Colleges and Universities, 2010, p. 2)
- <sup>3</sup> (Grummon, 2013)
- <sup>4</sup> (Hart Research Associates, 2013)
- <sup>5</sup> (Hart Research Associates, 2013, p. 1)
- <sup>6</sup> (Zakaria, 2015, p. 134)
- <sup>7</sup> (Shapiro, 2015, p. 1)
- <sup>8</sup> (Roth, 2014, para. 4)
- <sup>9</sup> (Nussbaum, 2004, para. 1)
- <sup>10</sup> (Ray, 2013, para. 2)
- <sup>11</sup> (Clark, 2016, p. 28)
- <sup>12</sup> Anders, 2016, para. 4)
- <sup>13</sup> (Hussar & Bailey, 2013)
- <sup>14</sup> (Selingo, 2016)
- <sup>15</sup> (Hussar & Bailey, 2013)
- <sup>16</sup> (Hussar & Bailey, 2013)
- <sup>17</sup> (Grummon, 2010)
- <sup>18</sup> (Grummon, 2010)
- <sup>19</sup> (Selingo, 2016)
- <sup>20</sup> (Shen, 2016)
- <sup>21</sup> (Henry, Pagano, Puckett, & Wilson, 2014)
- <sup>22</sup> (Finney, Doyle, Callan, & Harvey, 2016)
- <sup>23</sup> (Longmire and Company, Inc., 2008)
- <sup>24</sup> (Josuweit, 2015)
- <sup>25</sup> (Mitchell, 2016)
- <sup>26</sup> (Hurley, Harnisch, & Parker, 2015, p. 1)
- <sup>27</sup> (Hurley, McBain, Harnisch, & Russell, 2011)
- <sup>28</sup> (Grummon, 2010)
- <sup>29</sup> (Grummon, 2010)
- <sup>30</sup> (Hurley, Harnisch, & Parker, 2015)
- <sup>31</sup> (Holbrook, 2011)
- <sup>32</sup> (National Institute for Learning Outcomes Assessment, 2016)
- <sup>33</sup> (Sullivan, 2016, p. 38)
- <sup>34</sup> (Jaschik, 2016)
- <sup>35</sup> (Holbrook, 2011)
- <sup>36</sup> (Holbrook, 2011)

- <sup>37</sup> (Southern Association of Colleges and Schools Commission on Colleges, 2008, 2010)
- <sup>38</sup> (Nettles, Cole, & Sharp, 1997)
- <sup>39</sup> (Sullivan, 2011)
- <sup>40</sup> (Sullivan, 2011, para. 8)
- <sup>41</sup> (Grummon, 2010)
- <sup>42</sup> (Kuh, 2008)
- <sup>43</sup> (Kuh, Kinzie, Schuh, Whitt, & Associates, 2010)
- <sup>44</sup> (Kuh, 2008)
- <sup>45</sup> (Kuh, 2008, p. 19)
- <sup>46</sup> (Wabash College Center of Inquiry, 2010)
- <sup>47</sup> (Bousquet, 2011)
- <sup>48</sup> (Oxford Economics, 2012)
- <sup>49</sup> (Society for College and University Planning, 2015)
- <sup>50</sup> (Oxford Economics, 2012)
- <sup>51</sup> (Lingenfelter, 2010)
- <sup>52</sup> (International Monetary Fund, 2016A, p. 1)
- <sup>53</sup> (DeZure, 2008)
- <sup>54</sup> (Institute of International Education, 2015)
- <sup>55</sup> (Glenn, 2008)
- <sup>56</sup> (Selingo, 2016)
- <sup>57</sup> (Brown, 2015, p. 22)
- <sup>58</sup> (Brown, 2015)
- <sup>59</sup> (Selingo, 2016, p. 39)
- <sup>60</sup> (Glenn, 2008)
- <sup>61</sup> (Brown, 2015)
- <sup>62</sup> (Eyring & Christensen, 2011)
- <sup>63</sup> (Selingo, 2016, p. 33)
- <sup>64</sup> (Chronicle of Higher Education & American Public Media Marketplace, 2012)
- <sup>65</sup> (The Chronicle of Higher Education, 2015)
- <sup>66</sup> (Stryder Corporation, 2016)
- <sup>67</sup> (Gallup-Purdue University, 2015)
- <sup>68</sup> (New, 2016)
- <sup>69</sup> (Society for College and University Planning, 2015)