



2021 TRENDS

The Higher Learning Commission (HLC) compiles an annual list of higher education trends. This year the trends inform HLC's strategic plan, EVOLVE. The information gathered provides insight into one of the most dynamic years in world history, as well as a lens into the future of postsecondary education. The evolving information about the COVID-19 pandemic, coupled with growing social unrest and a momentous demographic shift in the traditional student population, will impact higher education forever. Changes in the White House and Congress will also shift some federal policy and financial support related to higher education. HLC member input contributed to the trends identified through surveys, conversations and submissions for a video for the HLC 125th anniversary time capsule. Despite the many challenges identified, the resilience of higher education remains remarkable during these times of crisis.

FINANCE

- Colleges and universities are facing significant resource challenges, which can result in mergers, affiliations, acquisitions and closures. Cuts in state funding and philanthropic donations and contraction of other revenue sources are leading to cash-flow concerns.
- Programs are being eliminated, often in the liberal arts. At the same time, new programs are being developed.
- Students are increasingly choosing a gap year after high school in response to limitations of on-site offerings, extracurricular activities and support services due to the pandemic.
- There is a rise in “mega universities,” many already well-prepared for remote learning.
- The cost of pandemic adaptations, coupled with health and wellness expenses, are placing increased pressures on budgets.
- Tuition is being adjusted and/or challenged during the pivot to online learning.
- The increased safety demands of social distancing and related requirements have resulted in threats to the current residential model, which are expected to continue after the pandemic ends.
- State and local investment in higher education, while relatively stable, has not reverted to levels seen before the 2008 recession. Increased expenses related to the pandemic have further constricted support.
- Public-private partnerships are increasing.
- Luxury amenities, a growing trend in the past two decades, are now under increased scrutiny, yet are still a part of the competitive environment.
- The high cost of new technology infrastructures and software adds to financial pressures.
- There is growing public pressure about the cost of college and the resultant return on investment (ROI), which is creating increased demands for transparency of operations and evidence of the value of higher education.

- Colleges and universities will need to make a stronger case regarding the value proposition of higher education.
- A quality education with measurable outcomes will continue to affirm the lifelong impact of earning a degree. The challenge will be balancing the ability for job placement and the importance of critical thinking. They are not mutually exclusive.

TEACHING, LEARNING AND ENROLLMENT

- Higher education continues to see a rise in the number of adult learners, with an accompanying decline in the 18- to 22-year-old demographic.
- The on-campus model is threatened by remote online learning and a hybrid of both on-campus and online. The move to these methods during the pandemic unveils the opportunities of choice, for both students and their institutions. It will permanently change higher education, although the level of impact is unknown.
- The “edifice complex” (adding new buildings) is challenged by the growth in remote online learning.
- The rise of credentials creates a dichotomy of choice, with students able to follow an expedited path to job placement and promotion. Credentials can lead to a degree, yet in many cases they stand alone, offered within or outside of higher education institutions.
- Displaced workers who normally turn to college courses and programs to improve their economic status are sometimes unable to pay tuition and fees as a result of the pandemic. Some do not have access to basic needs and cannot pay for gas to drive to a campus. Access to the internet and technology is a limiting factor for low-income students.
- The pandemic impacts access to clinicals, internships and apprenticeships aligned with programs due to increased health and safety compliance requirements.
- The rise of “in loco parentis” is apparent on campuses, sometimes putting faculty on the frontline of identifying pressures on students.
- The pivot from traditional teaching and learning methods is a culture shift on most campuses, challenging age-old traditions and the role of faculty.
- Faculty have been adding increased training for online learning to their workloads, essentially “drinking from the fire hose” during the first few semesters of the pandemic. However, the potential long-term shifts

to online learning allow more strategic preparation for institutions.

- The public is demanding student success outcomes data. The Biden administration, Congress and other stakeholders will place higher expectations for accountability on colleges and universities. Assessment is critical to assure positive learner outcomes.
- Research can be limited by the pandemic, with a concomitant impact on scholarship.
- Faculty are under increased stress, which has an overall impact on teaching and learning for students.
- Despite all the challenges, resilience and creativity are emerging that will permanently change the higher education landscape in positive ways.

LEADERSHIP IN A TIME OF CRISIS

- Crisis leadership training is imperative. Chief Executive Officers (CEOs) must be prepared for crises, both those that are predictable and others that were never imagined.
- Collaborative leadership of governing boards and CEOs is critical in face of growing health and social crises that impact their students, staff and the local community.
- Strategic visioning is critical to all institutions. The most successful plans include metrics (Key Performance Indicators) to measure success and directly tie to budget decisions. The lessons learned from the pandemic will impact any existing plan, requiring adaptability and agility.
- A new role is emerging for Chief Transformation Officers (CTOs). These new positions are dedicated to innovation.
- Resilience is a critical skill set for leaders.
- Transparency in a time of crisis, coupled with effective social and emotional intelligence, has been demonstrated by successful leaders.
- Partnering with external stakeholders remains central to the credibility and success of leaders.
- During times of crisis, leaders tend to take care of others. They also need to tend to their own emotional health and wellness.
- Over the past few decades, the role of the college president has become increasingly difficult; the pandemic adds exponential pressure on those in charge.
- With the turnover in leadership in higher education, preparation for those in the pipeline is imperative.

- Overall, higher education’s resilience during times of crisis reflects the strength and adaptability of leadership. There are many success stories for which leaders should be proud and applauded.

COMMUNITY, CULTURE AND ENGAGEMENT

- The meaning of “community” and town-gown relationships is shifting during the pandemic. While there are stresses on decision makers during crises, the importance of partnerships continues to be critical.
- The natural inclination of students to gather is threatened by health crises and likely cannot be fully controlled. The tension to be with others while facing limitations is palpable.
- During moments of social justice unrest in history, higher education has been a place for all voices to be heard. Free speech is still being challenged on some fronts.
- The efforts of institutions to help during the pandemic (food banks, vaccine sites, etc.) demonstrate the heart of higher education and the concern for community engagement.

SOCIAL EQUITY AND OUTRAGE

- Equity in a time of crisis is a great concern. The social divide is heightened as a result of the pandemic and its economic impact. Colleges have a critical role in maintaining the momentum toward equity.
- An emphasis on the common good is timely, highlighting the need for the higher education community to continue to serve as thought leaders for change.
- Racism, anti-Semitism and other forms of hate will have long-term impacts on movements toward diversity, equity and inclusion (DEI).
- Vitriol and fear are stimulating many to make their voices heard, which is seen on campuses in many ways.
- Assaults on democracy signal the importance of civic learning. Many higher education associations are supporting and advocating for social justice issues related to immigration, equity and other similar issues.
- Civic learning and engagement is mission-specific to colleges and universities, and each is responding in its own unique way.

- Low-income students are suffering the most as a result of the pandemic. Institutions will need to adapt to serve their needs.
- Colleges and universities have a great opportunity to “take advantage of a crisis” and adapt their culture, teaching and learning to reflect the need for societal changes that will impact equity.

STUDENTS, FACULTY AND BROKEN TRADITIONS

- Tenure and union contracts are at risk at some institutions, even without declaring fiscal exigency.
- Shifts in the residential model are seen at many institutions.
- The new remote learning environment impacts the overall culture of community on campuses.
- In the future, faculty office hours may not be held solely on campus.
- Productivity measurements will challenge current practices and hold the potential to strengthen outcomes, but many faculty members are not prepared for the likely pressures that will continue from the public, elected officials and the U.S. Department of Education.
- There is a critical need to focus on the unique mission of each institution in setting student success metrics, while not impairing students’ ability to transfer.
- Campus-affiliated daycare centers closed during the pandemic; their future is unknown.
- Doctoral programs are being disrupted by the pandemic.
- There is an increasing need for transfer options both now and in the future.
- The traditional model of students enrolling in courses and programs from one institution at a time is fading, as students increasingly take courses from multiple institutions simultaneously. This will lead to a heightened need for a national “learner record.”
- Credentials and micro-credentials are increasing, while degree completion remains a concern. The two do not need to be mutually exclusive.
- Extracurricular activities may return post-pandemic after “herd immunity” is attained through vaccination. However, questions remain about new levels of participation.

- A year after remote work was suddenly forced upon many, it is highly unlikely that higher education workplaces will remain the same. The long pandemic has heightened the awareness of the ability to be effective from a distance, part-time or full-time, in some job positions. A dispersed workforce will be implemented in many industries.

MENTAL HEALTH AND TRAUMA

- Maslow’s hierarchy of needs is front and center—safety and security first.
- A large percentage of students are experiencing depression and other mental health challenges.
- Faculty and staff are also under extreme stress from the pandemic and other pressures.
- CEOs are facing very difficult decisions, as well as opportunities for innovation. Both can cause stress.
- Awareness and fear are now part of the “normal” way of thinking; medical experts predict there will be more pandemics in the future.
- Many express the concern that remote work and learning is causing “Zoom fatigue.”
- Employees are working more hours, not less.
- Institutional health centers are not fully prepared | to meet all these needs.

- The current crises are an opportunity for institutions to respond in ways that can improve mental health for students, staff and other stakeholders.

ACCREDITATION AND THE CHANGING LANDSCAPE

- The above trends impact all member institutions, serving to inform HLC’s decisions, policies and practices.
- As a result of recent changes to federal regulations, historically regional accreditors are no longer bound to a specific geographic area, and HLC is now categorized as an institutional accreditor. The HLC Board of Trustees moved to change its bylaws to consider applications from colleges and universities from all 50 states.
- HLC continues to work closely with other members of the Triad (the states, the federal government and accreditors) to advance an advocacy agenda for higher education.
- The EVOLVE plan, adopted by the HLC Board in February 2021, will be in effect through the year 2025. As with all plans, HLC will continue to address dynamic changing issues in higher education.

HLC would like to thank the higher education press and national higher education associations for their diligent work in following the pandemic and social crises of the past year.

