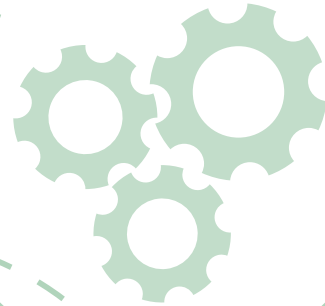




HIGHER LEARNING COMMISSION

2022 TRENDS



Higher education is changing rapidly as the forces facing today's colleges and universities become increasingly formidable. Yet within the vortex of those forces, there are many emerging opportunities for constructive and adaptable change. The acronym "VUCA" describes the environment well – it is filled with Volatility, Uncertainty, Complexity, and Ambiguity. The 2022 Trends compiled by HLC reflect a period of unimaginable challenges, met by the resilience of a dedicated sector of the economy, academia.

The following trends are an encapsulation of the past twelve months, with an eye toward the future, and an awareness of the importance of being well-informed and prepared. Change does not come easily, but the past few years have demonstrated the ability to rise to the occasion with innovation, transformation, and a laser focus on the students we serve. The books, articles and reports published in the past year provide a vast amount of insightful information to consider. The discussions have been very robust, if not scary. But it is not fear that drives higher education to consider these trends for the future; it is evidence of the need to take the right paths toward continuous improvement. As your accreditor, HLC stands ready to be a partner in that journey.

Barbara Gellman-Danley, President
April 2022

Looking Beyond the Rearview Mirror

- Higher education stands at a multi-lane crossroads. The most consistent trend is that the industry must change dramatically to meet the needs of students, the economy, and the many stakeholders within its ecosystem.
- There is no sector within higher education that is completely safe from the seismic changes taking place at this time.
- Leaders who are not prepared to adapt will fail. The current pressures will take bold leadership and collaborative solutions across (and among) institutions.
- While it is human nature to debate, discuss and "repeat," now is the time to be flexible, nimble, expedient, and responsive.
- Higher education is no longer an isolated industry sitting in the ivory tower. Today's consumers demand the right to help shape decisions, and they expect measurable results for their investment.
- The innovative institutions will survive and thrive. Those that continue to look through the rearview mirror will likely be threatened by obsolescence.

Equity and Access for All Learners

- While much work has been done to focus on diversity, equity and inclusion, there are still mountains to climb to meet important needs within higher education.
- There are significant barriers to equity and access that must be addressed. In 2022, the gaps are still far too wide to meet the needs of all learners.
- Whole sectors of society are left on the sidelines of higher education due to cost, location, programs, and the marginalization of certain populations.
- Underserved students are sometimes targeted with misinformation, adding substantial lifetime debt with diminished returns on investment.
- If the gaps are not narrowed in measurable ways, the U.S. system of higher education will lose the leading edge it held in past centuries.
- Equity is not something that takes place in only part of an institution, it is a culture that must be engrained in everyone working in higher education.
- The heart of any institution is its mission. Within that context, equity can be defined, expressed, and lived.
- Despite these challenges, many institutions have made substantial improvements toward meeting the equity agenda. More will follow.

Broken Models, New Opportunities

- It is deafening how often the words, “higher education is broken” are spoken or written. For the sake of accepting the depth of the trends research, it is fair to assume that statement has some real truth to it.
- Institutions need to consider moving from isolation to collaboration – within the college or university or with others.
- In a knowledge economy, new models will emerge that go far beyond traditional business models. In some cases, there will be very successful partnerships. In others, there may be a rush to solutions that are not well-defined or proven.

- This is the time to embrace new models of learning, those which are best for the future audiences served, not merely the historical foundations of the past.
- Change must be intentional, based on the input of stakeholders within and outside of the institution. All voices should be heard.
- Partnerships can be very helpful, as long as the right partnerships are formed.

Changing Demographics

- The decline in the traditional 18- to 22-year-old student is here, and it will continue well into the future.
- International student enrollment has declined in the past two years, while other countries are proactively seeking to attract those students.
- The United States remains a major destination of choice for international students, based on the strength and quality of its higher education system. However, political polarization and the pandemic have had a major impact on that market.
- The shift to more adult learners has been emerging for many years. At this time, institutions can be best positioned for success through diversification of the populations they serve, including those who are older and working.
- Veterans seeking higher education are on the increase, and research proves they are driven and successful learners.
- Minority Serving Institutions (MSIs) are on the rise across the country due to population shifts. These colleges and universities are receiving increased attention and support as elected officials prioritize their importance. As an example, infusions of funds to Historically Black Colleges and Universities (HBCUs) attract bi-partisan backing.
- Diversity, equity, and inclusion permeates a growing majority of learners; institutions must be prepared to support their success and completion. Appropriate support services and affinity organizations create a sense of welcome that is critical to persistence.

Teaching and Learning, Looking at Options Through a Kaleidoscope

- The pivot to online learning has been a sea change for higher education. The pandemic laid bare both the challenges and opportunities of remote learners. The lens through which programs are developed is no longer focused in one direction. Rather, the view is panoramic with many choices of delivery methods.
- Faculty are no longer the sole source of information dissemination. Today's institutions often coordinate teams of experts, such as instructional designers with experience in a variety of pedagogical methodologies. Many are well-versed in the unique andragogical needs of adult learners.
- The demand for flexibility and access is growing. Colleges and universities need to respond while focusing on quality assurance. The first few semesters during the pandemic did not allow those unfamiliar with distance learning to prepare and learn in advance. That time has passed, and extensive training is available.
- On-campus learning will always be important for those interested and able to embrace the traditional learning experience through residential or commuter programs. These on-campus course offerings may be heightened by appropriate technology enhancements.
- The pandemic provided urgency, and that urgency fueled the rapid growth of online learning across all of higher education.
- Competency-based education is growing exponentially as a means to assure intervals of success leading toward completion. Business and industry respond positively to a college's ability to measure outcomes and competencies related to the workforce.
- Transfer remains a national challenge. The barriers between and among sectors is a rising disservice that can result in high costs and wasted time for learners. The public is demanding updated transfer policies within the system.

The Great Pivot and Growth of Online Program Management Partnerships

- Many institutions are partnering with Online Program Managers (OPMs).
- Contractual arrangements can be successful, although some lead to complicated entanglements and tuition-sharing obligations.
- Many of the partnerships are formed to increase capacity that institutions do not have on their own.
- There is a significant growth of outsourcing of complete academic programs. Oversight needs to remain with the partner college or university. Consumers can be confused by the role of their institution versus the more independent partner.
- Faculty are very integral to the success of these partnerships. There can also be tensions when collaboration is diminished. While capacity is often the impetus for adding outside expertise, internal governance might be threatened.
- With rapid growth, there is a growing imbalance of students enrolled on campus and through OPM agreements. Statistics demonstrate that OPM companies sometimes enroll more students than those on campus.
- Well-developed and transparent business models can aid in the success of these partnerships.
- Consumers are questioning the quality and governance of increasing conversions from for-profit to not-for-profit entities.
- Several prestigious universities are engaged in partnerships with OPMs. The quality is assured through appropriate contractual arrangements. Much can be learned from these successful partnerships.

The New Credential Landscape, Multiple Choices for Learners

- There is an exponential rise of micro-credentials within and outside of higher education. This includes micro-masters at the graduate level.
- Increased competition among providers is escalating, threatening the prevailing edge that higher education was assured in the past.

- Non-degree programs and certificates are on the rise. Many learners are choosing these alternative offerings that may or may not lead toward a degree.
- Employers often encourage credentials that are short-term and provide immediate returns on investment. The credentials can lead to immediate promotion or new jobs.
- Many of these consumers are seeking continuing professional development to learn entirely new skill sets, reflecting the end of the “jobs for life, one career path” historical paradigm.
- Apprenticeships, coupled with a variety of credentials, are providing pathways to jobs and gaining increasing support from elected officials.
- With more than 1 million known credentials offered in the United States alone, learners need more coordinated information about the choices available to them.
- Many institutions are embedding certificates as stackable pathways to the degree.
- Expanded credentials open the door for new partnerships. Successful outcomes will be achieved through an emphasis on quality assurance, coupled with learner intent.
- Tuition-driven institutions will need to expand sources of revenue to strengthen their financial health. At the same time, they face criticism from the public about the rising cost of higher education.
- The COVID relief funds assisted most colleges and universities, but there is no sign they will be continued.
- For some students, the “Gap Year” evolved into the “Gone Year.” They did not start or return to college.
- Tuition discounting is on the rise at some institutions, which threatens sustainability.
- An increased focus on capital campaigns has been successful at many institutions. However, the funding is not always sustainable.
- Alternative providers and short-term credential programs are becoming an increasing threat to the financial models of higher education.

Financial Pressures and Enrollment

- Financial stress is growing across higher education with the decrease in enrollments in certain parts of the country, especially in community colleges.
- Institutions are building plans and new business models to assure sustainability.
- There is an increase in both mergers and acquisitions (or affiliations).
- The closure of institutions is increasing when finances and other pressures exceed the ability to continue.
- State funding is down in some areas, up in others, and in many cases is not at the level to make institutions “whole” from pre-recession years.
- Local funding is also under stress due to the pandemic and the associated costs of creating a safe environment.
- Public perceptions of the value of higher education are challenging the importance of attending college.
- While statistics still demonstrate the benefits of a college education across a person’s lifetime, many are questioning the return on investment.
- Reputational and other crises on campus permeate the news, lending to concerns about the integrity and strength of an institution.
- Outcomes matter, and without measurable metrics for success, it become increasingly easy to criticize the value of higher education. There is inconsistency about appropriate metrics and data analytics to assure the strength of both institutions and the benefits to students.
- An equity gap exists between colleges with the resources to support extensive data analytics and those without the resources to compete.

Is it Worth it? Public Perceptions About Higher Education

Political Polarization and the Impact on Academia

- Political polarization impacts all facets of society and is palpably present within higher education.
- The role of the CEO is increasingly difficult due these outside influences. It is very challenging to placate every constituency, which is driving some presidents and other leaders to step away from their positions.
- Threats to academic freedom and speech are mounting, while most institutions are very focused on finding a balance of contradictory viewpoints.
- Students want their voices to be heard, as do faculty. It is becoming difficult for governance systems to support shared voices.
- Some local and state elected officials are reaching deep into the governance and decision-making of colleges and universities, creating diverging positions and public discord.
- Debates over such issues as “cancel culture” are heightening stress and interfering with everything on campus, including overreach into the curriculum.
- Civic learning and engagement are critically important at this time.

Buyer Beware, Consumer Protection Demands

- Consumers expect increased transparency from institutions of higher learning.
- Integrity is challenged when an institution misleads students, which unfortunately reflects on the entire system of higher education.
- The public is very concerned about the increasing amount of student debt, and this is heightened when the ROI of a college education is in question. Many students are not well informed about financial literacy or the obligations of federal financial aid and private loans. Many simply do not comprehend the complexity of the decisions they make about financing their college education.
- The selection of a college is one of the most important decisions a person will make in his/

her life. Transparency of information and the outcomes of each program can mitigate the risks of making the wrong decision.

- Higher education leaders should anticipate increased efforts to legislate potentially prescriptive outcomes as a means of measuring student success as well as the quality of the higher education institution.

Post-Pandemic Mental Health, Imagining the Impact

- Students are reporting a large increase in mental health issues, exacerbated by the pandemic.
- The absence of in-person socialization created a sense of isolation and lack of a sense of belonging.
- Institutions have increased mental health services for students, but the costs can be prohibitive to many colleges and universities.
- Pandemic fatigue brought on a sense of malaise and depression in many students.
- Faculty and staff report a high level of burnout, and in some cases anger. People had little control over the drastic changes imposed on them, including the urgent pivot to remote learning and work.
- Research and collaboration suffered during the pandemic.
- The VUCA (Volatility, Uncertainty, Complexity, and Ambiguity) world disarmed individuals’ sense of security, and the lack of solutions exacerbated frustrations.
- On the other hand, universities contributed to the research on vaccines and other medical remedies.
- Faculty report emotional exhaustion, and arguably learning suffered.
- Intra-institutional tensions grew as decisions were made by leadership throughout the pandemic.
- Those in leadership positions faced immeasurable challenges in decision-making, and the impacts will be felt for years.
- Despite all of these challenges, higher education demonstrated remarkable resilience.

Human Resources and the Work “Place”

- The “Great Resignation” became one of many terms to describe the high number of individuals leaving their employment during the pandemic.
- The “Great Disengagement” reflects the lack of energy, motivation and affinity caused by the pandemic.
- Working parents faced nearly two years of multi-tasking while attending to children and work responsibilities at the same time.
- Much has been written recently about individuals examining their lives and making decisions to step away from work for a time or permanently.
- Remote work environments became increasingly sophisticated during the pandemic.
- As more expertise was gained and workers proved they could “keep the train running,” new hybrid models emerged.
- Retention and attraction of employees has been greatly impacted by the lessons learned during the pandemic. They expect flexible hours and the ability to work from a distance.
- Despite all the challenges of the past two years, students are often excited to be back in a classroom. Yet many are demanding online, asynchronous learning. Technology personnel are to be commended for their commitment to supporting institutions during and after the pandemic.
- The rising costs of adapting new technologies added to financial pressure within higher education. The pandemic expedited the use of innovative new strategies, such as artificial intelligence.
- The workplace environment will never be the same, and higher education will need to continue to evolve accordingly.

Accreditation and Quality Assurance

- At the national level, accreditors continued to advocate on behalf of institutions and students throughout the pandemic.
- The Triad (states, the federal government, and accreditors) increased collaboration to serve

institutions of higher education during the pandemic. This can lead to greater coordination in the future.

- Accreditors are facing increased pressure for quantifiable metrics to measure outcomes at member institutions.
- Engagement and advocacy continue as HLC begins its work on differential accreditation.
- The past year was a time of reflection on ways accreditors could serve their members during a time of high stress due to the pandemic.
- In July 2020, federal regulations were changed to allow competition among accreditors, formerly bound by regions. HLC committed to providing significant value to its current members as a priority.
- HLC moved all visits to virtual during the pandemic, implementing federal waivers and hybrid options.
- HLC’s obligations and tasks continue, with employees working from home during the pandemic.
- HLC provided online training through the Online Learning Consortium (OLC), with support from Lumina Foundation.
- The HLC Annual Conference was held virtually in 2021, with a return to in-person (with some sessions virtual) in 2022.
- HLC continued work on its strategic plan, EVOLVE, reflecting agility and adaptability to the pressures of the past two years.
- The HLC Board used this past year to study the future of accreditation and ways to reengineer in ways that support members and the students they serve. Exciting new initiatives will be introduced in the 2023 academic year.

Appreciation is extended to the higher education press and other authors who worked tirelessly to keep us informed during these challenging times.

