

The UPCEA Executive's Guide to Research

Institutional Representative Briefing

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Preface

At each college and university, Institutional Representatives are the gateway to professionals in the field. Prepandemic, UPCEA had anticipated significant challenges and opportunities in higher education. The pandemic has accelerated these, as well as exposed new ones.

Early in the pandemic, UPCEA anticipated the need for more information to help units migrate through the chaos to best leverage resources. The UPCEA Center for Research and Strategy shifted resources away from new program feasibility studies and other support services to tackling many issues through the use of information.

The Center leveraged existing resources, as well as partnered with many organizations in the UPCEA community. As a result, there exists a pool of information assets that are potentially underutilized by leaders and their staff. This Executive's Guide is an effort to increase the dissemination of research to the community by highlighting key findings and better directing staff to online resources.

Jim Fong Chief Research Officer, UPCEA

Outlook

Higher Education Outlook

Enrollments Were on the Decline Before the Pandemic: Pre-pandemic, higher education was operating under an assumption that a demographic cliff was approaching, but institutions could survive by providing greater access to education through online delivery. Despite many institutions offering fully online professional masters degrees, higher education enrollments were still in decline. Institutions were optimistic in online education being a stop gap solution to an approaching problem. From 2012 to 2019, the declines were small from ranging from 1.2% to 1.9% annually and could be easily explained away or ignored. However, these declines were masking a larger problem, as were happening consistently every year for eight years despite increasing or flat high school graduation rates during the same period (*NCES 2020*).

The Great Interruption: During the pandemic, more students left higher education or chose not to enroll *(National Student Clearinghouse)* leaving higher education even more exposed. In just over a decade (2011 to 2021), two million less students enrolled in higher education (with a disproportionate number of males) ... with the demographic cliff nearly upon us, The demographic cliff is a prediction that lower birth rates as a result of lifestyle and economic factors from the 2008 recession will result in fewer 18-yea- olds from 2025 to 2030 *(InsideHigherEd, May 2021)*.

Higher education is in a precarious position as federal funds, with the exception of the most recent pandemic years, has decreased over the past eight years (*Pew Research*) while state funding has increased for most states (*GAO*, *IBISWorld*). This coupled with decreasing tuition reimbursement (*SHRM 2020*) suggests that higher education may become out of reach for more traditional students and potentially for adult learners. However, creating more accessible or modular education in the form of alternative or stackable credentials may create new opportunities for colleges and universities and delay or prevent financial disaster for many institutions.

Outlook

Economic Outlook

Pre-pandemic, the economy was transforming, but at a slower, predictable and more manageable rate for higher education. Automation was advancing into many industries, as were new technologies such as blockchain and bitcoin. Data analytics and high-powered computing would serve as the underpinning for many of these technologies. As a result, higher education could grow with it and contribute to its societal and economic integration. Higher education could also comfortably evolve in certain growth areas, such as cybersecurity, coding, renewable energy among others.

The pandemic changed everything and accelerated the future. Employers, while still valuing the degree, needed faster, more affordable and immediate solutions for their workforce. Industries that fast-forwarded more quickly from the future included manufacturing, healthcare, transportation, logistics and food systems. With the economy in turmoil, the <u>Great Resignation has also changed the outlook of work in the future</u>. As filling job vacancies became more difficult, employers have sought out new solutions that will impact higher education, including robotics and automation. To fill employee gaps, businesses and industries have turned to new technologies that bypass the human factor in many cases that will reshape the future.

In the future, given today's supply chain and human capital challenges, self-driving cars and trucks will deliver people or goods to various destinations. Retail shortages are being addressed through self-service kiosks, immediate delivery and robotics. With Boomers leaving the workforce at a faster than expected rate (Pew), <u>Millennial decision-making will</u> increase the adoption of renewable energy, inclusion in the workforce, demand for plant-based proteins, adoption of the virtual/digital wallet, normality of the remote workforce and the acceptance of other credentials beyond the typical college degree.

Jim Fong Chief Research Officer, UPCEA

PCO Units Have Become More Important in Reaching New and Existing Audiences

2022 State of Continuing Education



Which of the following best describes the role of your PCO unit since the start of the COVID-19 pandemic? (n=135)

7% 2	25%	12%
7'	%	% 25%

- Our role has expanded: there's more opportunities to collaborate and expand offerings than before
- Our role has diminished: main campus faculties are developing non-degree and online offerings in isolation
- Our role is unchanged: we're effectively operating as we were before



White paper download

PANDEMIC EFFECT SNAP POLL

In February 2021, individuals from 54 institutions took a brief survey on the effect of the pandemic on their PCO units in 2020 and beyond. Invitations were sent out via UPCEA's Member Matters newsletter and a link was posted on the UPCEA CORe discussion site.



Source: https://drive.google.com/file/d/1Q6Im_PWBCRBOe90XOTuGsdogotSIGxOI/view

As institutions struggle to define themselves postpandemic, PCO units are looked at for leadership and innovation as they interface more closely with employers. PCO units have the ability or potential to reach new audiences, connect existing audiences better and generate new sources of revenue for cost-heavy institutions.

Employers are Still Incredibly Dependent on Higher Education

Professional, continuing and online educations became more valued and important to their institution as a result of the pandemic. With many institutions facing severe fiscal challenges, the push to reach new online learners while serving campus-based learners who moved online was critical. In addition, business and industry also sees the value in partnerships with higher education.

InsideTrack Employer Survey Snapshot

Survey Goal

The goal of the survey is help **identify gaps** between employer perspectives on credentials and what the educational landscape offers, through a better understanding of employer **perceptions**, **values, and commitments.**

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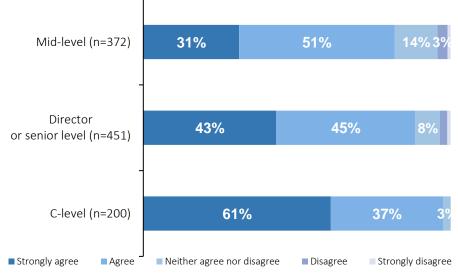
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UPCEA/InsideTrack Employer Survey 2022

My organization has the desire to create relevant programs for our employees, or other professionals in the field, in partnership with institutions of higher education.



Source: UPCEA & InsideTrack Credentials at Work: Employer Perceptions of Short-Term Credentials, Results to be shared Spring 2022

Institutions Will Need to Reach More Audiences to be Sustainable

With anticipated demographic declines expected for 2025 to 2030, colleges and universities can no longer rely on the 18-to-22 yearold to fund the bulk of their operations. To offset enrollment losses in the decade pre-pandemic, many institutions invested in the development and launch of professional master's degrees.

With that market now saturated, institutions will look to their PCO units to expand revenues by serving audiences beyond those seeking graduate degrees. A recent UPCEA snap poll shows that many will expand programs aimed at adult learners and transfer students. They will also seek out corporate audiences and larger employers, as well as engage with other populations including alumni (who they haven't had full access to in the past).

During the pandemic, approximately one million less students enrolled in higher education institutions. In the decade prior, a million less individuals chose not to enroll in college compared to 2011. Fall 2021 Undergraduate Enrollment declined **by 3.1%, or 465,300 students**, compared to Fall 2020 Decline since Fall 2019: **6.6%**

Source:https://www.studentclearinghouse.org/blog/fall-2021-undergraduate-enrollment-declines

UPCEA Snap Poll, December 2021

Change in amount of programming for audiences that institutions plan to serve in next 5 years (n=140)

Adult learners/transfers	88%			10%
Corp. audiences	87%			13%
Larger, regl. or nat'l. employers			1	.7%
Healthcare community			20	0%
Tech. workers			24	%
Incarcerated individuals			28%	b
Alumni	72%		27%	5
Local or small business	66%		32%	
Youth (K-12)	66%		34%	
Gov./municipal workers	66%		32%	
Mature/older audeinces	59%		36%	5%
Law enf./emerg. mgmt.		50% 47%		
Legal comm.		47% 53%		
00	% 25% !	50%	75%	100%
_	_	_		
Increasing	No Change	D	ecreasing	

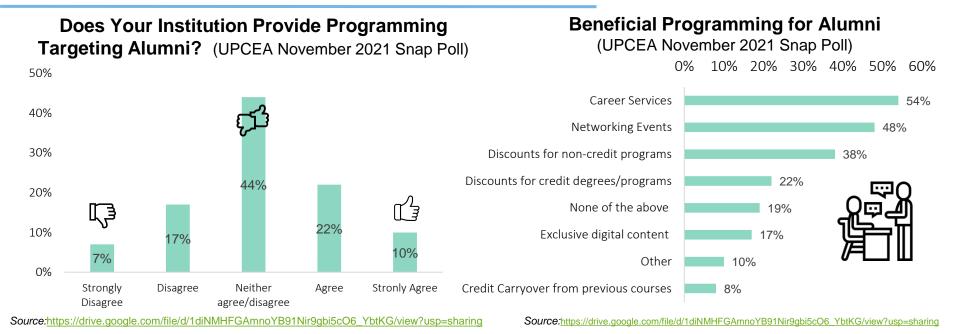
Source: https://drive.google.com/file/d/1n8BqgsotjpzJ4JLFH6qvFREZW3uNu8_/view?usp=sharing

The New Adult or Professional Learner	According to National Student Clearinghouse, more than 36 million Americans have attended college but have not completed their degree. <i>Source: National Student Clearinghouse</i>				
Professional Education & Career Enhancers	Employers	New Traditional	Military	Alumni	
S.	\bigcirc			Ŕ	
 MOOC participation alone has almost doubled since the start of the pandemic. 220M participants in 2021 compared to 120M in 2019 Source: <u>Class Central</u> 	 EdSurge & S. Gallagher report that employers are awarding credentials based on training experiences. UPCEA and Strada research shows that employers are more open to alternative credentials. There are also generational differences regarding the value of a degree. 	 UPCEA research with InsideTrack shows slightly more high school graduates immediately attending fully online degree programs. 51.8% of students took one or more courses online in 2019-2020, compared to 37% in 2018-2019. Source: Inside Higher Ed 	 17 million active-duty or veteran students in the U.S. <u>About a million</u> access their GI Bill benefits annually since 2009. Veterans are more likely to hold a certificate or certificate or certification (57%). 42% hold an associate or bachelor's degree. 	 More institutions of higher education have embarked on a "One-University" or "One-College" model where lifelong learning and engagement goes beyond a single degree. Alumni engagement could improve if partnered with top employers to keep alumni looped into programs they could potentially need 	

Previously Incarcerated

- All and a
- Since 2013, <u>7 million</u> people have been released from jail and 600,000 people from prison per year
 Formerly incarcerated individuals can have trouble seeking employment, and a flexible, online affordable education gives them a potential opportunity to integrate better into society.
- Fulfills a mission for many institutions regarding societal outreach. Source: Healthy People

Leveraging Alumni as One of Many Segments

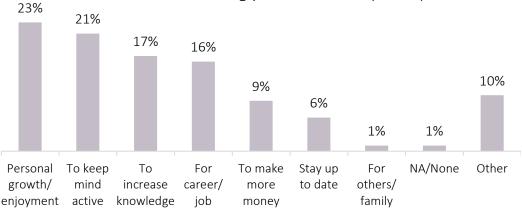


Research shows that alumni are an underused resource and underleveraged market. Institutions can cater to this new audience through better inclusion of alumni in marketing, program development, career services and relevant networking (i.e. advisory boards, offering internships, contributing to capstone work) to boost enrollments directly or as influencers in their organizations. UPCEA research has shown that many institutions have not strategically planned their program development efforts to include alumni because of access issues.

Boomer Learners, Retirees, and the Mature Adult Learner

Mature learners, those over the age of 50, are a growing demographic that present higher education with significant opportunity. Motivations for this group are vastly different than those of younger generations, which institutions will need to keep in mind when developing programming and marketing those offerings. Interestingly, many of these individuals prefer an online delivery format over a hybrid or face-to-face format.

What is your main motivation for learning new skills, learning about new subjects, receiving additional training, or continuing your education? (n=585)

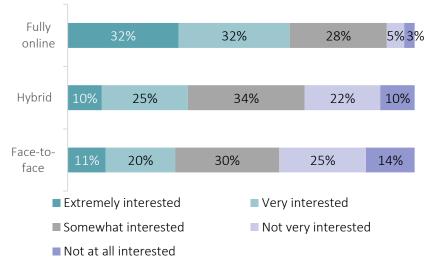


Source: UPCEA & MindEdge – Boomer Learners, Retirees, and the Mature Adult Learner (2022) Results to be shared in Spring 2022

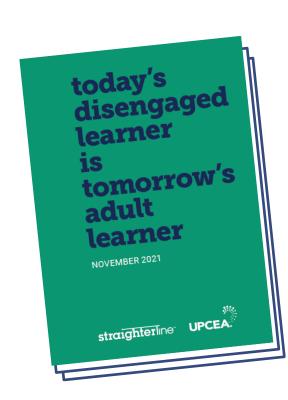
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Interest in Delivery Formats (n=560)



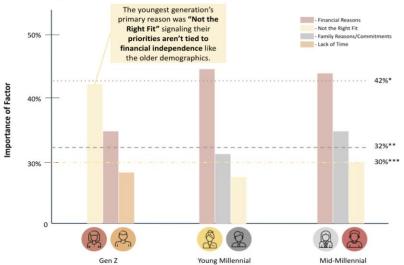
New Opportunities Should Arise as a Result of the Pandemic: Degree Completion



Degree completion could be a growing market for PCO units and their institutions in the future.

Many students cite the reasons for leaving their institution as financial (42%), family reasons/commitments (32%), and not the right fit (30%). Research by the National Student Clearinghouse shows that more men than women left higher education during the pandemic. If colleges and universities redesign and market their credentials better, then they may recapture students in a degree-completion format. Degree-completion could be the next higher education battleground with tactics such as stackable credentials and noncredit-to-credit as tactical differentiators.

Figure 4: Reasons for Leaving Institution - By Persona



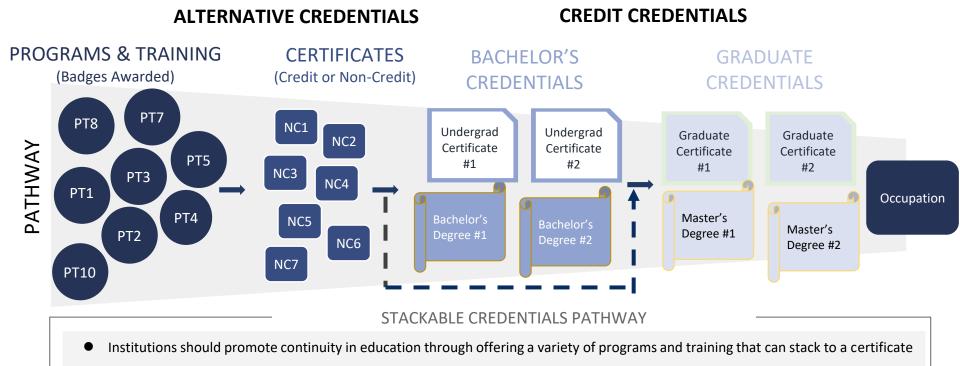
White paper download

Source: UPCEA & Straighterline Today's Disengaged Learner is Tomorrow's Adult Learner, November 2021

To Reach New and Existing Audiences, PCO Units Will Need to Think Beyond the Degree

Ideal Stackable Pathway Map

A stackable credentials pathway allows for competencies to be translated into courses that build into credit or non-credit programs



and ultimately a bachelor's / master's degree.

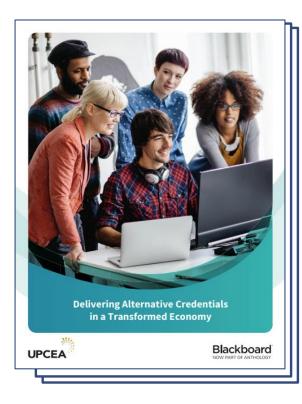
Growth of the Alternative Credential Market

The alternative credential market continues to grow from an institution perspective and from a provider perspective (corporate training and upskilling). Whether higher education becomes the leader or whether employers take the reins, alternative credentials are here to stay. Colleges and universities can choose to innovate and lead and be a primary supplier of alternative credentials or they can sit on the sidelines hoping, waiting or reacting.



Source: https://www.prnewswire.com/news-releases/alternative-credentials-market-for-higher-education-to-grow-by-usd-1-40billionkey-drivers-and-market-forecasts17000-technavio-reports-301347723.html

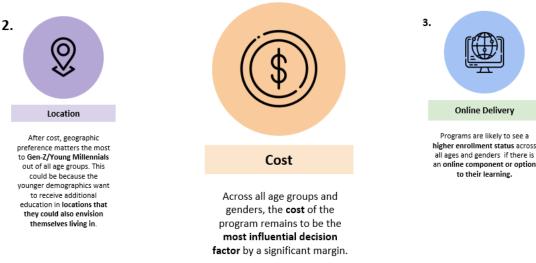
Competing in a New Economy Will Require Increased Accessibility and Flexibility to New Credentials



In partnership with Blackboard, UPCEA examined six segments of learners and cost continues to be a hurdle when it comes to pursuing a degree. However, value can be improved through a stackable and alternative credentialing strategy.

Students across all segments listed their largest consideration of pursuing a program as cost, followed by location and the option of online delivery. Institutions must provide flexible learning options through non-credit offerings in order to attract learners of all age groups.

Largest Considerations when Pursuing Higher Education



White paper download

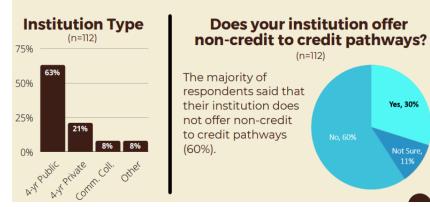
Source: UPCEA & Blackboard – Delivering Alternative Credentials in a Transformed Economy, April 2022

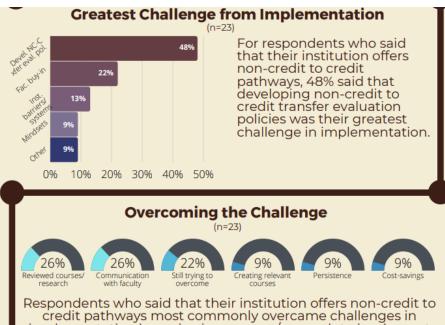
Competing in a New Economy Will Require Increased Accessibility and Flexibility to New Credentials

In order to attract adult learners back to education, it is imperative that institutions offer non-credit to credit pathways. Recognizing learning in other modalities, as opposed to just credit, will be critical in terms of increasing value, reducing cost and shorting the time it takes to earn a degree.

Institutions that have already established pathways cite transfer evaluation policies as the greatest challenge. This issue is most easily solved through communication and reviewing courses and research.

Noncredit to Credit Pathways Offerings





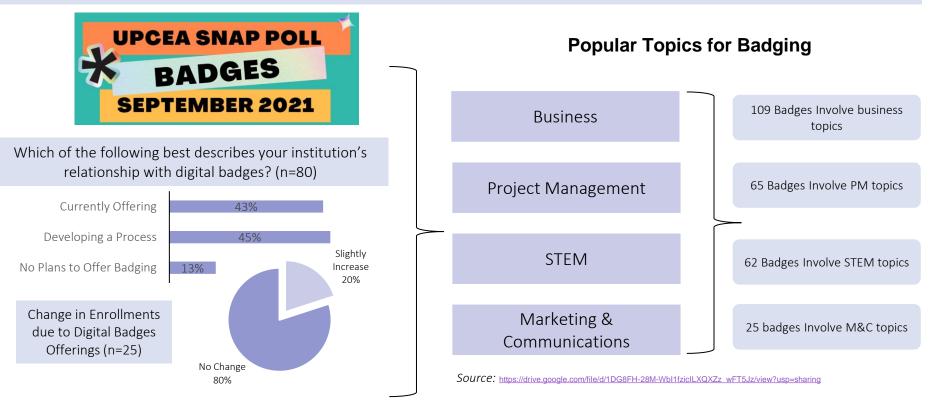
Noncredit to Credit Pathways Hurdles

credit pathways most commonly overcame challenges in implementation by reviewing courses/research to implement and communicating with faculty (both 26%).

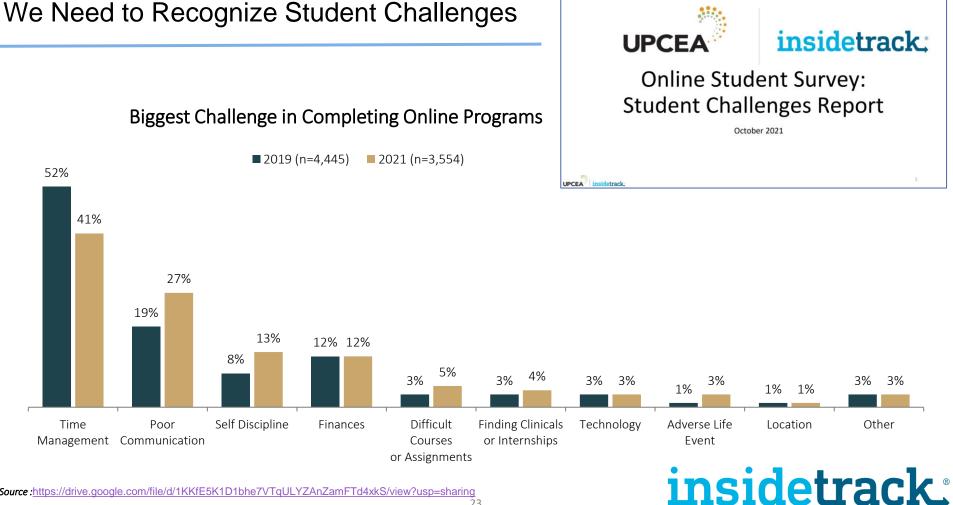
Source: https://drive.google.com/file/d/1yDO2zWL9ZQQ4_PL6i78d4feX733mJtM-/view?usp=sharing

The Value of New Credentials

In order to better prepare students for a transformed economy and provide new offerings, badges have shown to be a valuable new credential. The most popular badges have been in business and STEM.

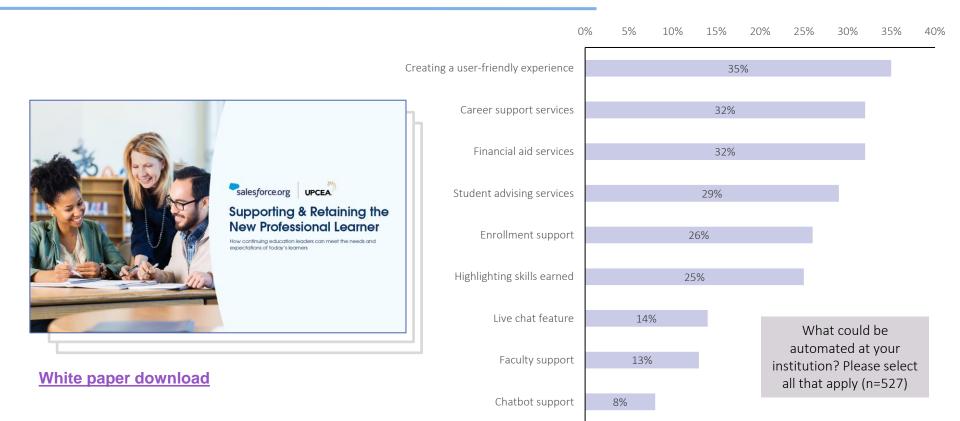


To Reach New and Existing Audiences, PCO Units Will Need to Become More Agile, Adaptable and Efficient



Source :https://drive.google.com/file/d/1KKfE5K1D1bhe7VTqULYZAnZamFTd4xkS/view?usp=sharing

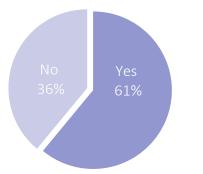
We Need to be More Student Centered to Compete in a New Economy



Source: UPCEA & SalesForce – Supporting & Retaining the New Professional Learner, December 2021

Rising Relevance of Third-Party Providers

Does your professional or continuing education unit ever use third-party providers for course development, content, or materials? (n=49)



Third Party providers are increasingly being viewed as a valuable tool to improve PCO units. When considering a third-party provider, the most common considerations are quality of content, pricing / margins, and customer support.

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85%

72%

62%

58%

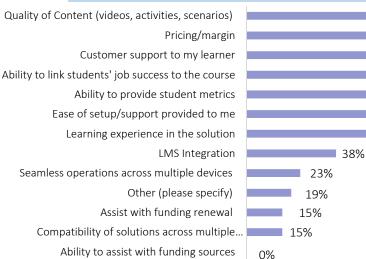
58%

58%

54%

UPCEA @ed2go

Which factors do you take into consideration in choosing a third-party provider? Please select all that apply. (n=30)

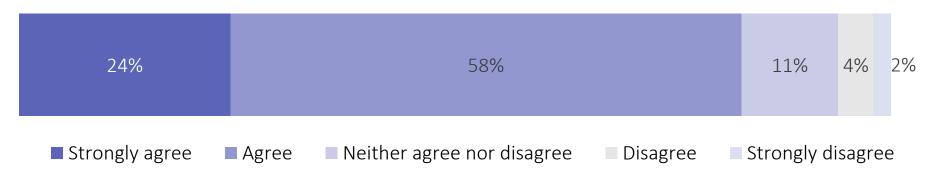


Source: UPCEA & ed2go COVID and Third-Party Providers, Results to be shared in Spring 2022 Third Party Providers and PCO Units



In total, 82% of respondents strongly agree (24%) or agree (58%) that the COVID-19 Pandemic has positively affected their institution's view of online courses

How strongly do you agree or disagree with the following statement: the associated impacts of COVID-19 has positively affected my institution's view of online courses. (n=45)

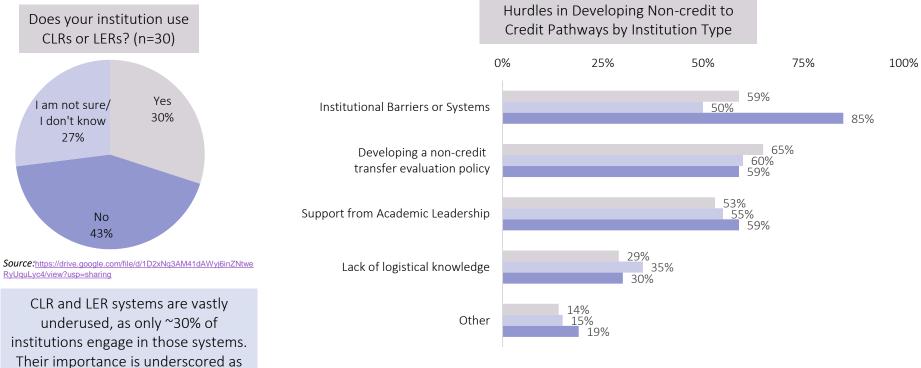




Upgrading Our Systems Will Be Critical

they are part of the largest barrier to

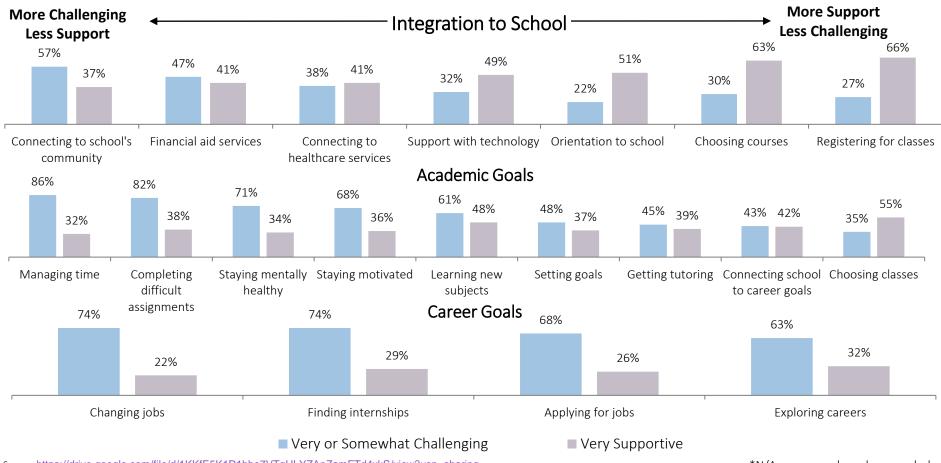
establish non-credit and credit pathways for large institutions.



Small Institutions (<5,000 students, n=17)
 Large Institutions (>15,000 students, n=27)

Medium Institutions (5,000 - 15,000 students, n=17)

We Must Adequately Support and Resource Student Challenges

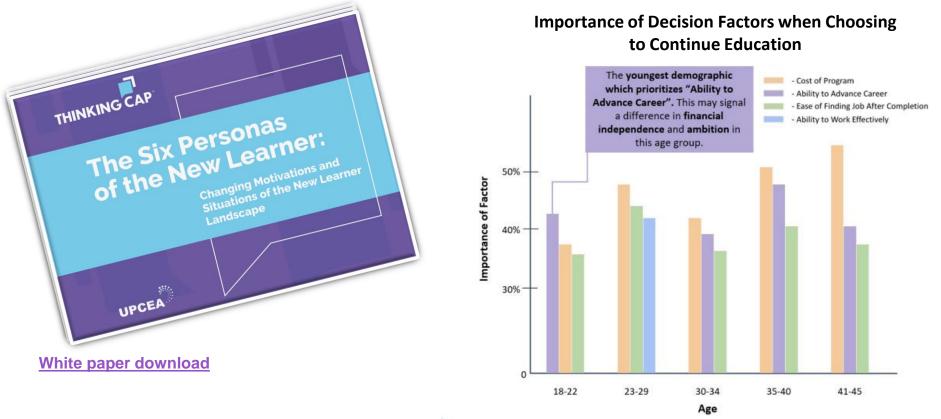


Source: https://drive.google.com/file/d/1KKfE5K1D1bhe7VTqULYZAnZamFTd4xkS/view?usp=sharing

*N/A responses have been excluded

Institutions Must Consider Consumer Preferences and How They Receive Messaging

Institutions Must be Consumer-Centric to Increase Retention



Source: UPCEA & ThinkingCap – The Six Personas of the New Learner, 2021

Many UPCEA members are not prepared to attract the new adult learner.

Average Overall Score: 68%

Average Website Score: 78%

Average Social Media Score: 57%

Institution Label	Type of Institution	Rank	Total Score
Institution A	Public	1	93%
Institution Ar	Public	2	93%
Institution Aa	Public	3	92%
Institution Ba	Public	4	87%
Institution F	Private	5	86%
Institution Bi	Public	6	86%
Institution B	Public	7	86%
Institution C	Private	8	85%
Institution D	Public	9	84%
Institution Aw	Public	10	84%
Institution E	Public	11	83%
Institution G	Public	12	82%
Institution Bj	Public	13	82%
Institution Br	Public	14	82%
Institution Bn	Public	15	81%
Institution Ag	Private	16	81%
Institution Bw	Public	17	81%
Institution Bu	Public	18	81%
Institution H	Public	19	80%
Institution Ab	Public	20	80%
Institution I	Private	21	80%
Institution Af	Public	22	79%
Institution Au	Private	23	79%
Institution Bb	Public	24	79%
Institution Bf	Private	25	78%
Institution Bk	Private	26	77%
Institution Av	Public	27	75%
Institution At	Private	28	75%
Institution J	Public	29	74%

Rank 30-58				
Institution Label	Type of Institution	Rank	Total Score	
Institution Aq	Public	30	74%	
Institution Bc	Private	31	74%	
Institution Ay	Public	32	73%	
Institution K	Private	33	73%	
Institution As	Private	34	72%	
Institution Al	Public	35	72%	
Institution Be	Private	36	71%	
Institution Bt	Public	37	71%	
Institution Bd	Public	38	71%	
Institution Ah	Public	39	71%	
Institution L	Private	40	70%	
Institution P	Private	40	70%	
Institution Ca	Public	42	69%	
Institution Xa	Public	43	69%	
Institution Cb	Public	44	69%	
Institution Ao	Private	45	69%	
Institution M	Public	46	68%	
Institution N	Public	47	67%	
Institution Bp	Public	48	66%	
Institution Ac	Public	49	66%	
Institution Aj	Private	50	66%	
Institution An	Private	51	64%	
Institution Bo	Public	52	64%	
Institution Bh	Public	53	62%	
Institution Bg	Public	54	62%	
Institution Cd	Private	55	61%	
Institution Ae	Public	56	61%	
Institution Q	Public	57	61%	
Institution Cd	Public	58	60%	

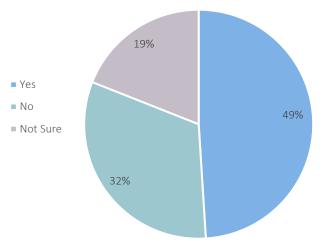
Ra	nk	59	-79

Institution Label	Type of Institution	Rank	Total Score
Institution Ax	Public	59	59%
Institution R	Public	60	59%
Institution Bz	Public	61	59%
Institution Ap	Public	62	56%
Institution S	Public	63	55%
Institution T	Public	64	55%
Institution Bm	Public	65	54%
Institution Az	Private	66	53%
Institution U	Public	67	51%
Institution V	Public	68	50%
Institution Am	Public	69	50%
Institution Ak	Private	70	49%
Institution W	Public	71	49%
Institution Bs	Public	72	48%
Institution Ai	Private	73	47%
Institution X	Private	74	46%
Institution Bq	Public	75	46%
Institution Y	Public	76	45%
Institution Ad	Public	77	45%
Institution Z	Private	78	45%
Institution Bl	Private	79	42%

Contact UPCEA's Center for Research and Strategy for more details about the online asset assessment (OAA)

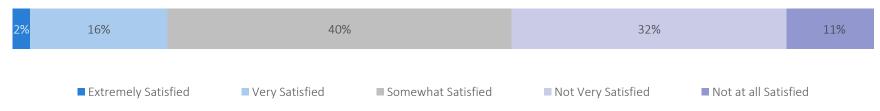
Social Media Shortcomings

Are social media campaigns strategically connected to other marketing efforts (i.e., planned in advance, part of the marketing strategy, etc.)? (n=57)

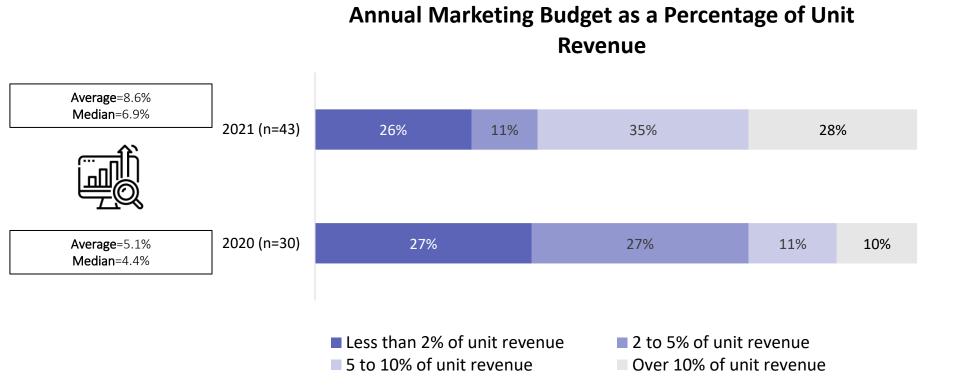




How satisfied are you with your organization's social media efforts to support professional, continuing, and online (PCO) programming? (n=57)

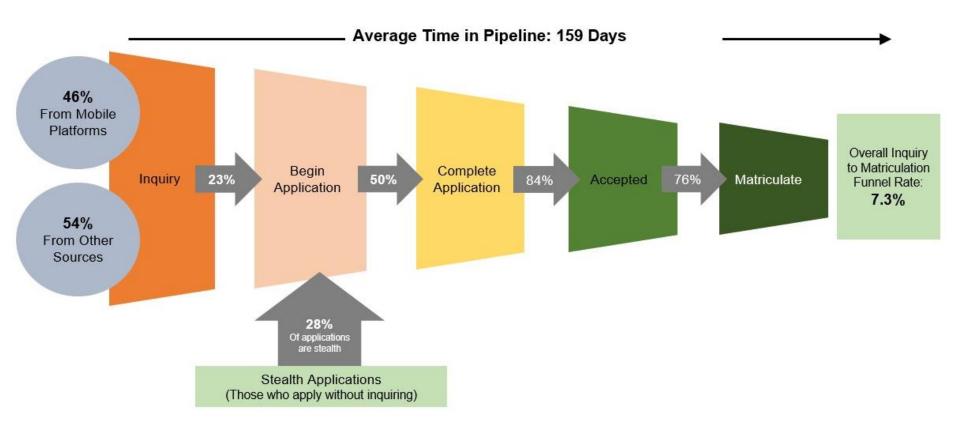


Marketing Budget as a Percentage of Unit Revenue



Source: UPCEA 2022 Marketing Survey*; https://drive.google.com/file/d/1Bg-gUJE6IzSfXYzrOrzxTGOs641m4gQX/view?usp=sharing

Marketing Enrollment Funnel

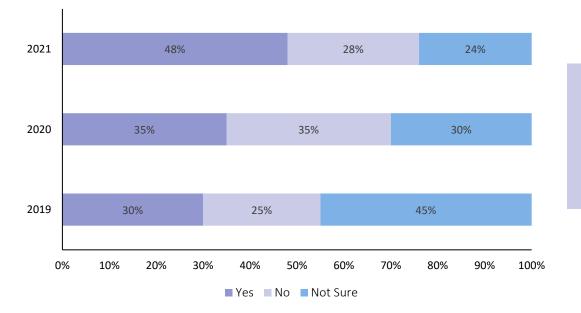


Source: https://drive.google.com/file/d/1-eMzvi11MbFpgkwl-hL3LRTZClvTWgZZ/view?usp=sharing

Human Capital is One of PCO's Greatest Assets

Remote Work Policies Prohibit Team Application Growth

Do you lose applicants or team members due to your remote work policy or the inability of team members to work remotely?

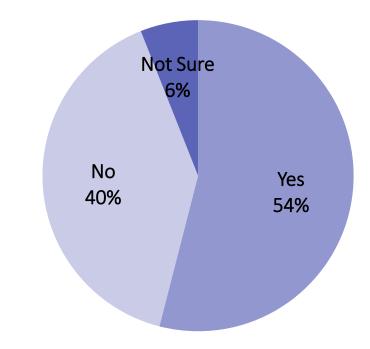




Due to the pandemic, companies have seen a decline in applications and individuals willing to work remotely. Through implementing more remote options in credentials, individuals will be better prepared for the changing landscape of the workforce.

A majority of companies felt a loss in key staff throughout the pandemic. The main positions that were difficult to fill included instructional designers, technical positions, program managers/leaders, and advisors. This data can be helpful for institutions to inform new programming and focus on specific subjects and how to make students more attractive to employers (n=65)

UPCEA SNAP POLL - JULY 2021 STAFFING NEEDS POST-PANDEMIC



Source: https://drive.google.com/file/d/1Uvau8HmZ97pvGkqP2XNmAUNS86X0dt5e/view?usp=sharing

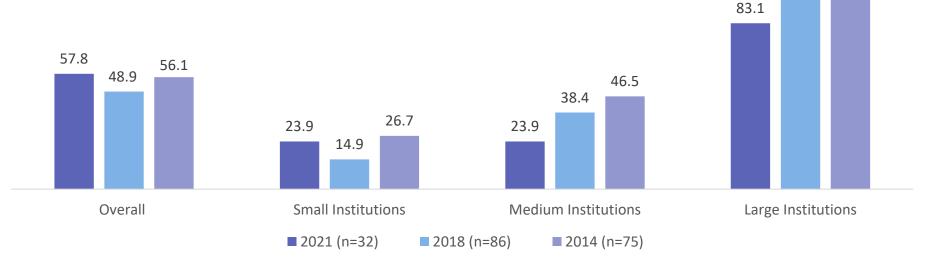
Average Full-Time Employee Staff Sizes



Average FTE Staff Sizes (2021, 2018, 2014)

107.1

99.0

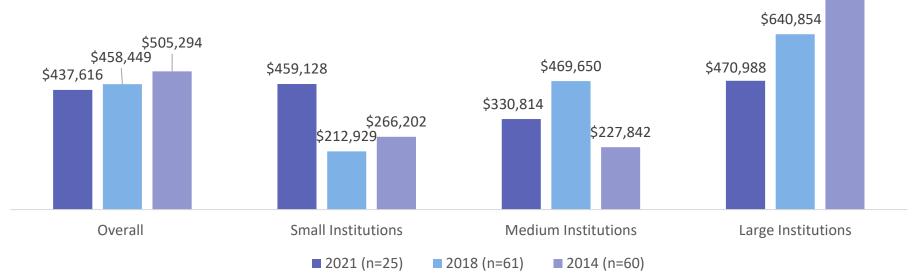


Average Gross Revenue per Full-Time Employee



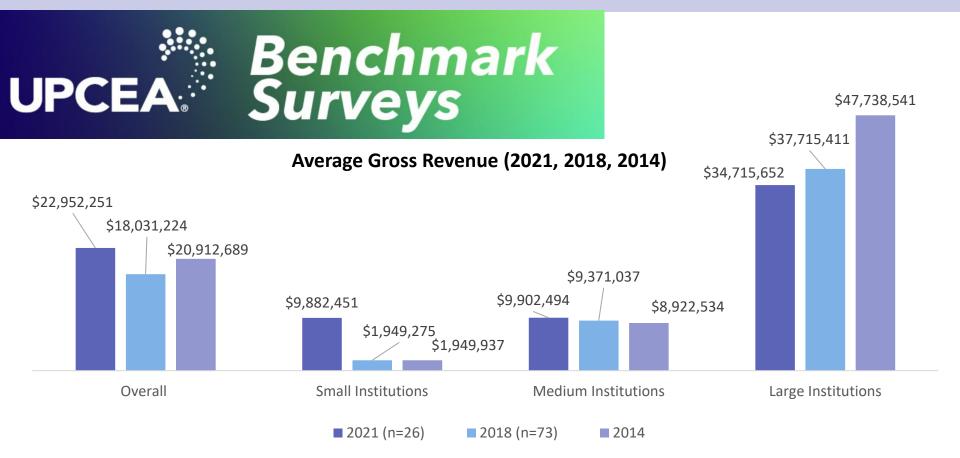
Average Gross Revenue per Employee (2021, 2018, 2014)

\$830,710



Source: UPCEA Revenue, Budget, Staffing, and Outsourcing Survey, 2022*

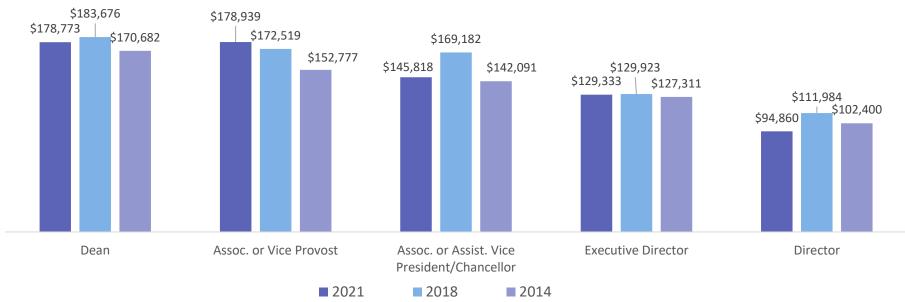
Average Gross Revenue



UPCEA Salary Survey: Core Positions Salaries



Average Salary of Top Administrator by Title (2021, 2018, 2014)



Source: UPCEA Salary Survey, 2021, 2018, 2014 – 2021 data only available to participants

Library of Sources

Below are a list of studies and snap polls that UPCEA has compiled *Results have not yet been shared

White Papers

UPCEA – An Update on Badging and Micro-Credentials, September 2020 UPCEA & StraighterLine – Today's Disengaged Learner is Tomorrow's Adult Learner, November 2021 UPCEA & Salesforce – Supporting and Retaining the New Professional Learner, December 2021 UPCEA & Blackboard – Delivering Alternative Credentials in a Transformed Economy, January 2022 UPCEA & InsideTrack – Online Student Retention: Gap Analysis, 2021 UPCEA & InsideTrack – Online Student Retention: Gap Analysis, 2021 UPCEA & ThinkingCap – Six Personas of the New Learner, 2021 UPCEA & The EvoLLLution – 2022 State of Continuing Education, 2022 UPCEA & InsideTrack – Credentials at Work: Employer Perceptions of Short-Term Credentials* UPCEA & ed2go – COVID and Third-Party Providers* UPCEA & MindEdge – Boomer Learners, Retirees, and the Mature Adult Learner* UPCEA Marketing Metrics: UPCEA Member Survey Results (2020) UPCEA 2018 Salary Survey

OF CEA 2010 Salary Surv

Snap Polls

UPCEA Snap Poll - Pandemic Effect, February 2021 UPCEA Snap Poll - Non-Credit to Credit Pathways, March 2021 UPCEA Snap Poll - Staffing Needs Post-Pandemic, July 2021 UPCEA Snap Poll - Badging, September 2021 UPCEA Snap Poll - Alumni as an Audience, November 2021 UPCEA Snap Poll - Audiences Served, December 2021 UPCEA Snap Poll - Comprehensive Learner Records and Learning and Employment Records, February 2022 UPCEA Snap Poll – Social Media Success, March 2022