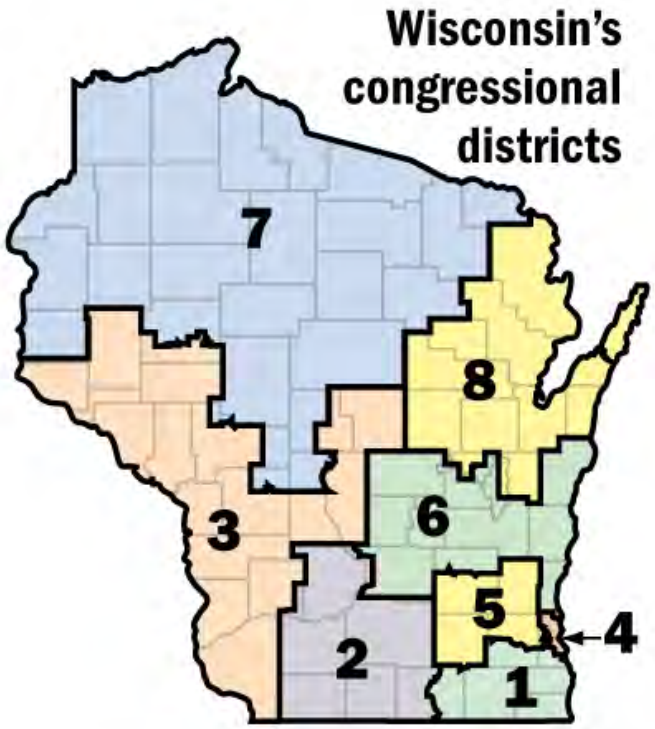
The Future of Postsecondary Career Education

STEVE GUNDERSON, PRESIDENT AND CEO OF CECU
MID-STATES FORUM ON THE FUTURE OF CAREER-TECHNICAL EDUCATION
MARCH 3, 2020

CECU Career Education Colleges and Universities

BROWN
COLLEGE
UNIVERSITY OF WISCONSIN–MADISON


Wisconsin's
congressional
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SOAP
FACTORY

“The Challenge before us!”

- 8.4 million NEW jobs by 2028!
- 18,854,200 separations projected annually!

Annual Demand for new workers: 19,694,000!

-BLS Projections: 2018 – 2028

But... College Enrollment is changing!

1990 - 2011

- Enrollment increased 54%
- 12 million to 18.5 million students!

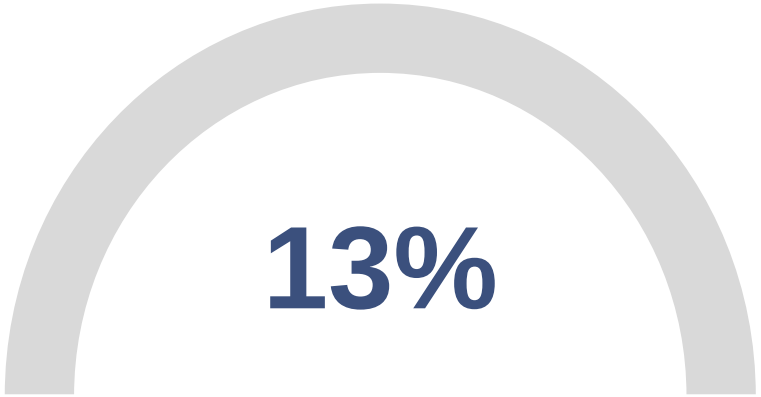
2019:

- The 8th consecutive year of declining college enrollment

74% of the decline is in adult students (over 24 years of age)

National Student Clearinghouse®

-National Student Clearinghouse



“The nation’s 2-year colleges will face a 13% decline from 2012 base over the decade.

- “Some southern states will see declines of up to 29%!”
- The question is whether the growing # of Hispanic students go on to college.

Justin Fox

“The Coming Enrollment Bust” May, 2019

Two Year Institutions:

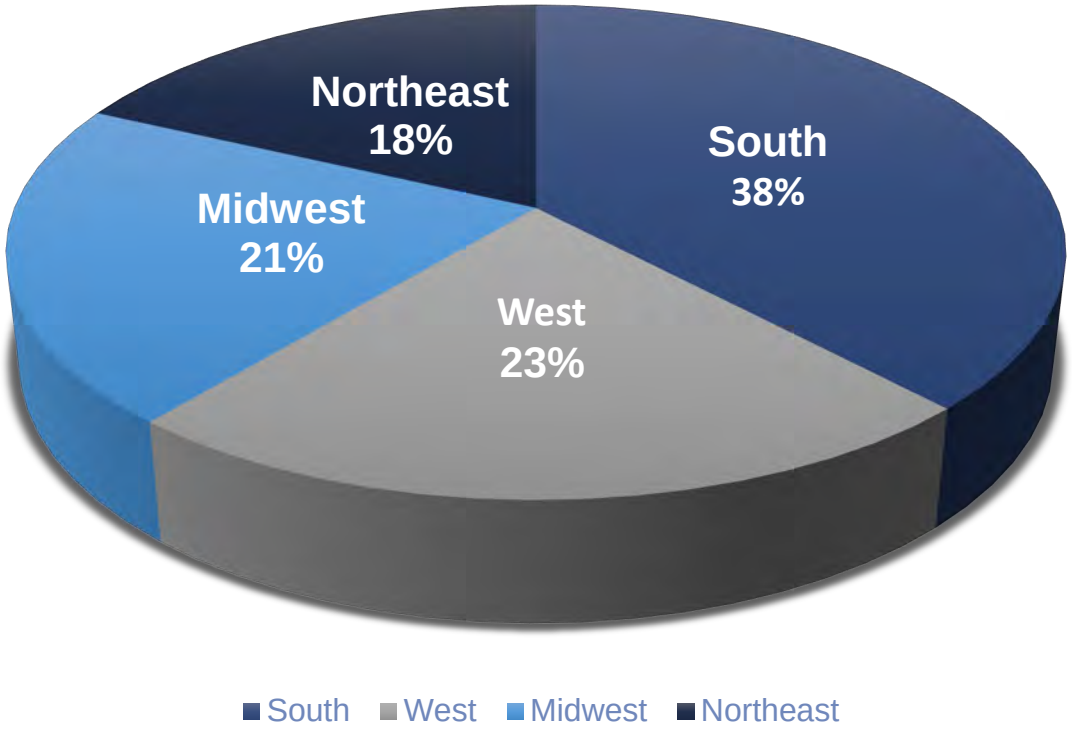
2012 Enrollment	7,167,840
2028 Projection	6,148,000
Impact	**-1,019,840 A 14.2% decrease!**

- National Center for Education Statistics

Increased Skill Demand!

Decreasing Enrollment!

Job Openings by Region (August 2019)

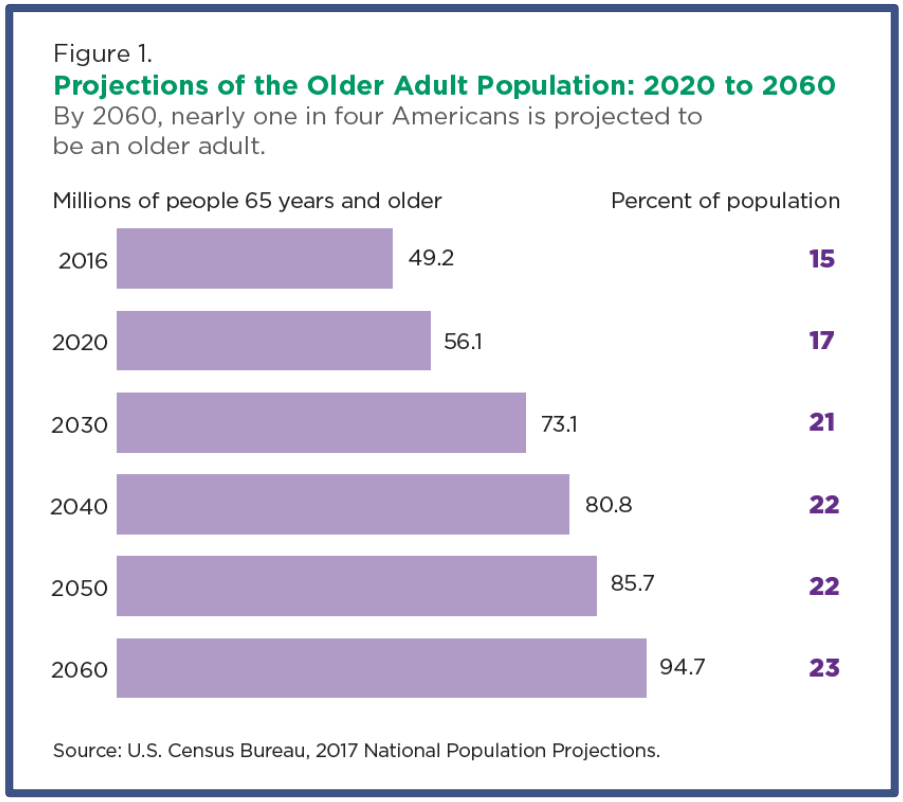


America’s Projected Workforce Population (18 – 64 years of age):

2020	2030	2040
202.6M	206.3M	215.4M

-U.S. Census Bureau

The Aging of America's Workforce:



By 2030, 20% of the nation's population will be 65+.

The Changing Demographics of our Population:

Race	2016	2030	2060
White-Not Hispanic	68%	62.5%	49.6%
Black	13.7%	14.3%	15.2%
Native Am/Alaskan	1.2%	1.3%	1.5%
Asian	2.3%	3.1%	5.2%
Hawaiian/Pacific Is	0.2%	0.2%	0.3%
2 or more Races	2.7%	3.8%	7.1%
Hispanic	13.5%	17.1%	25.1%

-U.S. Census Bureau

Automation and Artificial Intelligence: The BIG Winners!

- Builders: 35% growth through 2030
  - (Building Engineers, Construction, Surveyors, Installation/Repair)
- Technology: 34% growth through 2030
  - (Computer Specialists, Computer Engineers)
- Care Professionals: 30% growth through 2030
  - (Nurses, Health Aides/Support; Health Technology, Community/Social Workers)

-McKinsey Global Institute

“Projected Growth by Academic Credential: 2018 – 2028”

Certificates

- Healthcare Support: 13.6%
- Healthcare Practitioner: 10.8%
- Art, design, media: 10.1%
- Personal Care Services: 8.8%
- Legal: 7%
- Protective Services: 5.3%
- Transportation: 4.9%
- Business: 4.6%
- Food Prep: 3.9%
- Installation/Repair: 2.2%

Associate Degrees

- Healthcare Support: 29%
- Healthcare Practitioners: 12%
- Legal: 11%
- Computer: 9%
- Education: 7%
- Management: 5%
- Physical/Social Science: 5%
- Installation/Repair: 3%

Bachelor Degrees

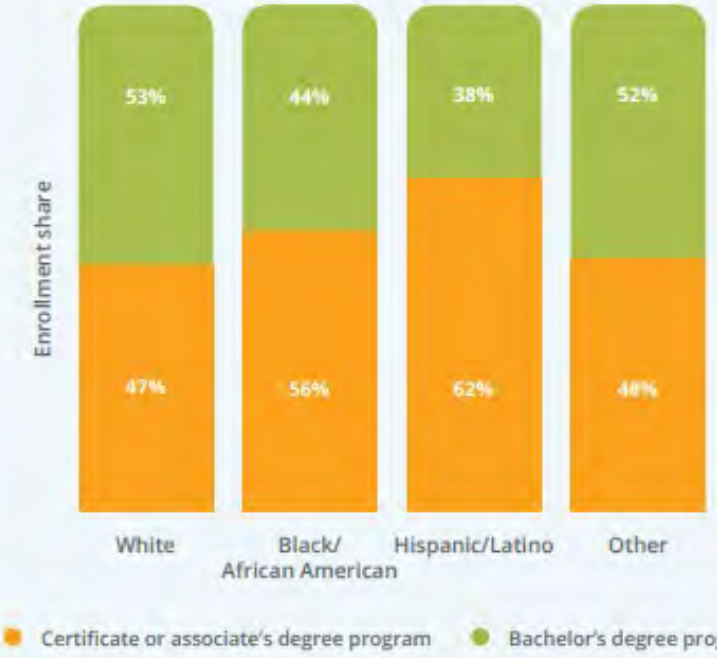
- Computer: 13.2%
- Healthcare Practitioner: 11.9%
- Community/Social: 9.8%
- Management: 7.9%
- Legal: 7.8%
- Business: 7.4%
- Physical/Social Science: 6.1%
- Administrative Support: 5.8%
- Architect/Engineering: 5.1%

“The Students Before Us!”

“Overall, students who enroll in certificate and associate degree programs are more likely to be Black, Latino, Low-Income and older.”

-Georgetown University Center on Education and the Workforce
“The Overlooked Value of Certificates and Associate’s Degrees.”

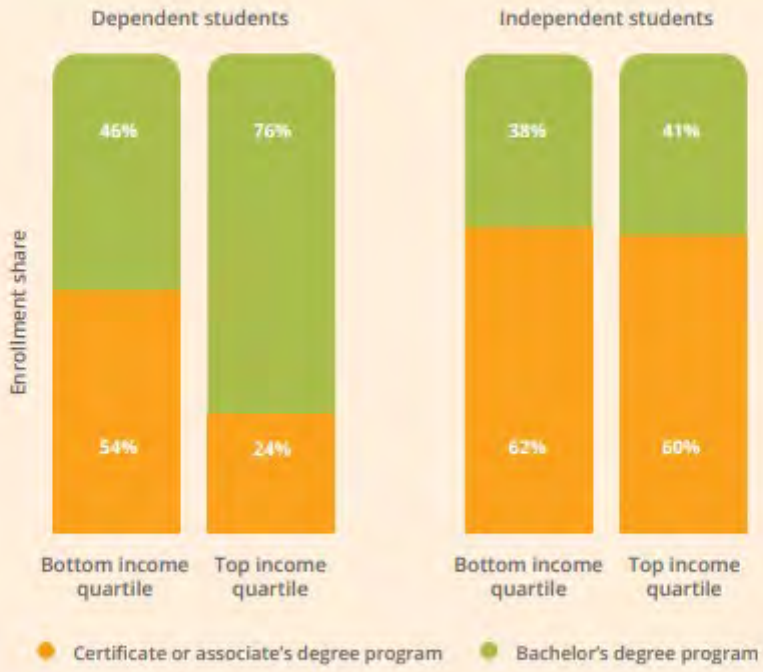
FIGURE 8. More than half of Latino and Black undergraduate students are enrolled in certificate or associate's degree programs.



Source: Georgetown University Center on Education and the Workforce analysis of data from the National Postsecondary Student Aid

Georgetown University Center on Education and the Workforce
"The Overlooked Value of Certificates and Associate's Degrees"
page 16

FIGURE 9. **Among undergraduate students, low-income independent students are the most likely to enroll in certificate or associate's degree programs.**

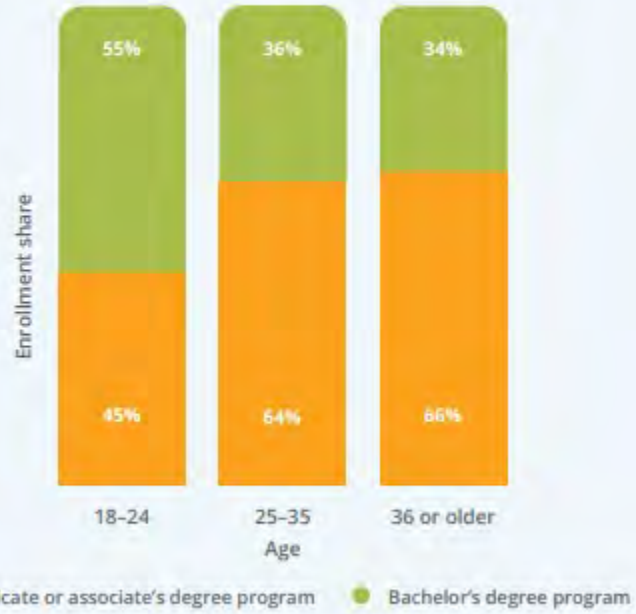


Source: Georgetown University Center on Education and the Workforce analysis of data from the National Postsecondary Student Aid Study (NPSAS), 2016.

Note: Percentages may not sum to 100 due to rounding.

Georgetown University Center on Education and the Workforce
"The Overlooked Value of Certificates and Associate's Degrees"
page 17

FIGURE 10. Among undergraduate students, older students are overwhelmingly enrolled in certificate and associate's degree programs.



Source: Georgetown University Center on Education and the Workforce analysis of data from the National Postsecondary Student Aid Study (NPSAS), 2016.

Georgetown University Center on Education and the Workforce
"The Overlooked Value of Certificates and Associate's Degrees"
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“Demographics, automation and inequality have the potential to dramatically reshape our world in the 2020’s and beyond.”

-Bain Macro Trends

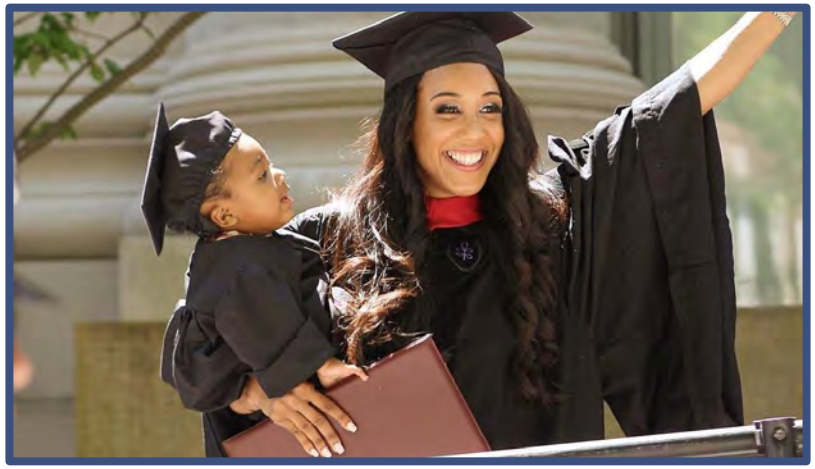
“There is no one-size-fits-all solution for preparing the workforce of the 21st century and no single best pathway to economic mobility, whether a particular credential level or field of study. The most promising solutions for Miami will be different than those for Missoula.”

-“Back to School? What adults without Degrees say about additional education and training.” Strada/Gallup 2019

Today's Students:

- 58% work while in college
- 26% are raising children
- 38% are older than 25

-Higher Learning Advocates, October 2017



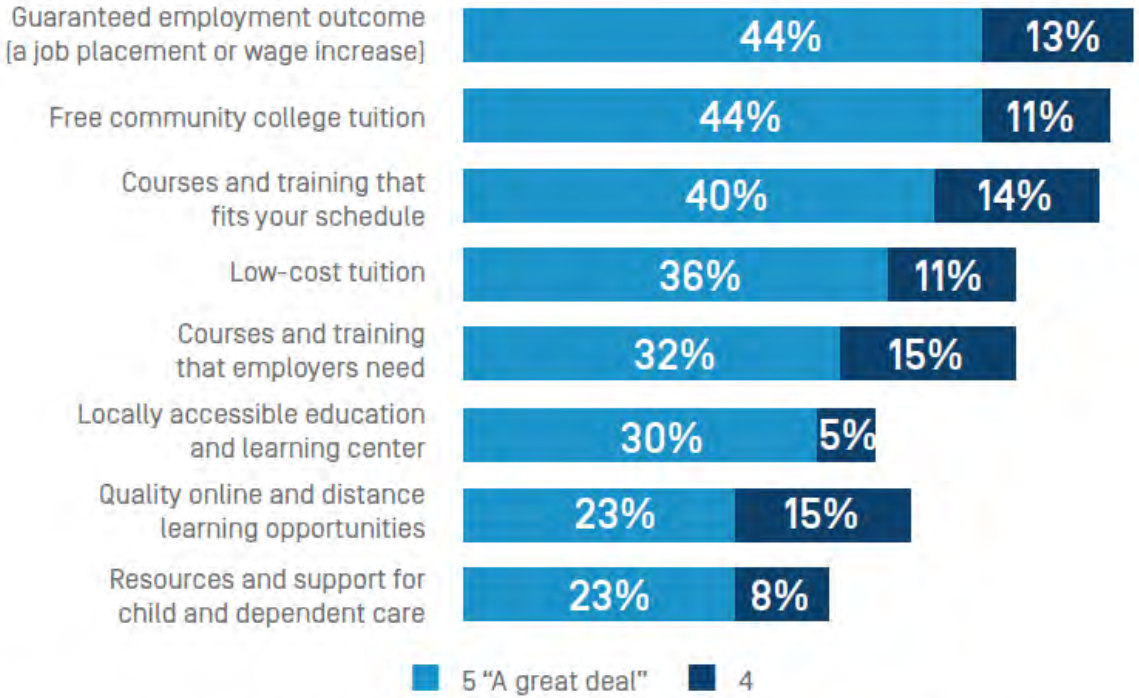
“46% of those w/o a college degree believe they need additional education to advance their career.”

-“The State of American Jobs”
Pew Research Center, 2016

FIGURE 9:

CONSUMERS SAY EMPLOYMENT OUTCOMES, AFFORDABILITY AND ACCESS WILL HAVE THE STRONGEST IMPACT ON ENROLLMENT

How would each of the following impact your likelihood of enrolling in additional education?
Please use a five-point scale where 5 means it would impact your likelihood a great deal and 1 means not at all.



Source: Strada-Gallup Education Consumer Survey 2019. **Base:** U.S. Adults 18-65 with less than an associate degree and who are not currently enrolled. N=8,849

"Back to School?"
Strada/Gallup

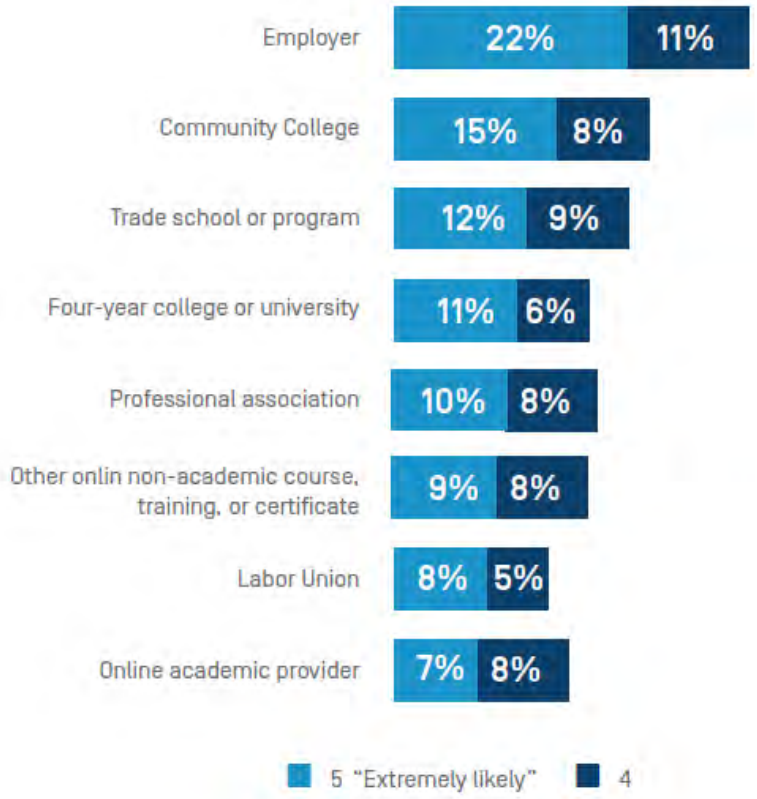
“The Delivery of Career Education!”

Where do adults go for additional education?

FIGURE 8:

ADULTS WITHOUT DEGREES SAY THEY ARE MOST LIKELY TO SEEK ADDITIONAL EDUCATION FROM EMPLOYERS

On a five-point scale, where 5 means extremely likely and 1 means not at all likely, in the next five years, how likely are you to enroll in courses or training offered through each of the following?



Source: Strada-Gallup Education Consumer Survey 2019. **Base:** U.S. Adults 18-65 with less than an associate degree and who are not currently enrolled. N=8,849

"Back to School?"
Strada/Gallup

Zovio Subsidiary Fullstack Academy Signs Agreement With Louisiana State University to Offer Cybersecurity and Web Development Certificates

CHANDLER, Ariz., Feb. 4, 2020 /PRNewswire/ -- Zovio (Nasdaq: ZVO), an education technology services company, announced today that Fullstack Academy, a Zovio subsidiary, has partnered with Louisiana State University to offer two coding programs.

Zovio logo (PRNewsFoto/Zovio) (PRNewsfoto/Zovio)

In partnership with Louisiana State University's Digital and Continuing Education division, Louisiana State University students will be able to enroll in certificates in Cybersecurity and Web Development. The part-time program will take six months to finish, and students will receive a certificate from Fullstack Academy and Louisiana State University upon completion.

"Together, Fullstack and Louisiana State University are working to close the skills gap by enabling Louisiana companies to hire Louisiana talent with cutting-edge skills, as opposed to outsourcing their IT needs," said David Yang, Fullstack Academy co-founder.

"With more than 8,000 open positions in these fields in Louisiana, this partnership aligns with Zovio's focus on identifying the most meaningful ways to enhance learner experiences and deliver strong outcomes for higher education institutions, employers, and learners," said Greg Finkelstein, Executive Vice President and Chief Operating Officer.

Fullstack Academy, which became part of Zovio in 2019, and is one of the top coding bootcamps in the country, offers full-time and part-time programs in web development and cybersecurity. In 2016, Fullstack Academy launched Grace Hopper Academy, the first all-women coding bootcamp in New York City and the first nation-wide to offer a deferred tuition model.

About Zovio

Zovio (Nasdaq: ZVO) is an education technology services company that partners with higher education institutions and employers to deliver innovative, personalized solutions to help learners and leaders achieve their aspirations. The Zovio network, which includes Fullstack Academy , TutorMe, and Learn@Forbes, leverages its core strengths and applies its technology and capabilities to priority market needs. Using advanced data and analytics, Zovio identifies the most meaningful ways to enhance the learner experience and deliver strong outcomes for higher education institutions, employers, and learners. Zovio's purpose is to help everyone be in a class of their own. For more information, visit www.zovio.com.

Contact: Alanna Vitucci
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858 668 2586 x11636

White House to Promote Alternatives to the Degree

February 24, 2020
Inside Higher Ed
Paul Fain

Ivanka Trump (L) and Tim Cook (2nd L), Apple's CEO, with President Donald Trump (R) in November 2019

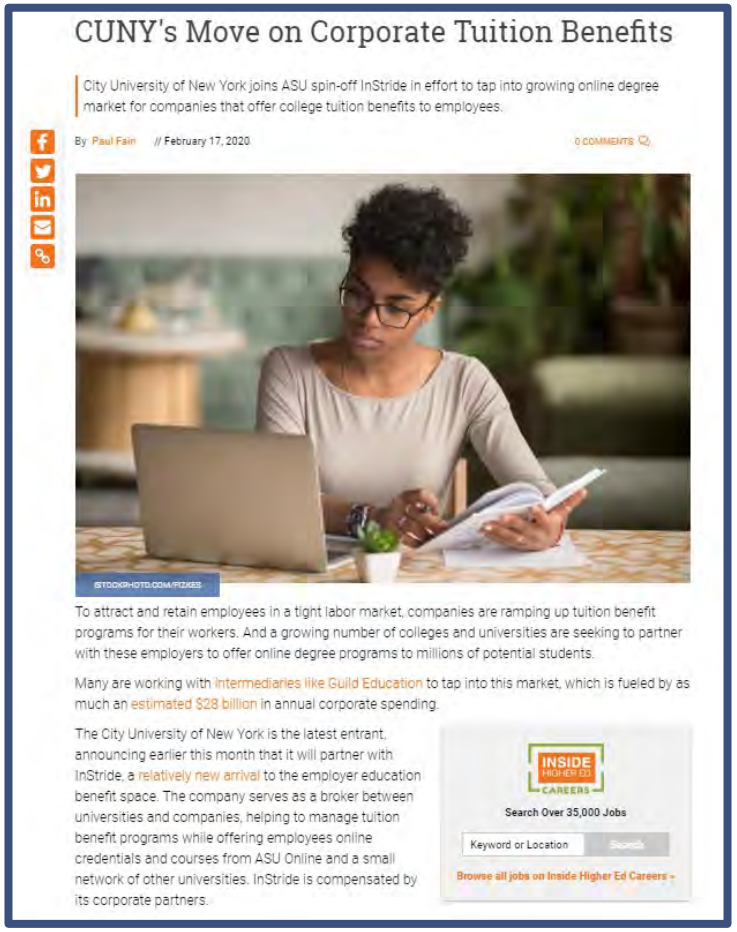
New Ad Council campaign will tout alternatives to the four-year degree. Led by CEOs of Apple and IBM, the project comes from a White House-convened task force on workforce policy.

The Ad Council, which was behind the Smokey Bear and “Just Say No” campaigns for the U.S. government, is set to launch a national advertising promotion for postsecondary education and training alternatives to the four-year college degree.

The "groundbreaking" national campaign will be led by the nonprofit Ad Council in “close association” with IBM, Apple and the White House, the council said.

The ads "will shine a light on how young and working adults can develop the skills in demand for today’s job market," a council spokeswoman said in a written statement, while also seeking to "raise awareness of the wide variety of educational options available, such as coding bootcamps, on-the-job apprenticeships, certifications, associate’s degrees and more."

CUNY's Move on Corporate Tuition Benefits



CUNY's Move on Corporate Tuition Benefits

City University of New York joins ASU spin-off InStride in effort to tap into growing online degree market for companies that offer college tuition benefits to employees.

By Paul Fain // February 17, 2020 0 COMMENTS

To attract and retain employees in a tight labor market, companies are ramping up tuition benefit programs for their workers. And a growing number of colleges and universities are seeking to partner with these employers to offer online degree programs to millions of potential students.

Many are working with intermediaries like Guild Education to tap into this market, which is fueled by as much an estimated $28 billion in annual corporate spending.

The City University of New York is the latest entrant, announcing earlier this month that it will partner with InStride, a relatively new arrival to the employer education benefit space. The company serves as a broker between universities and companies, helping to manage tuition benefit programs while offering employees online credentials and courses from ASU Online and a small network of other universities. InStride is compensated by its corporate partners.

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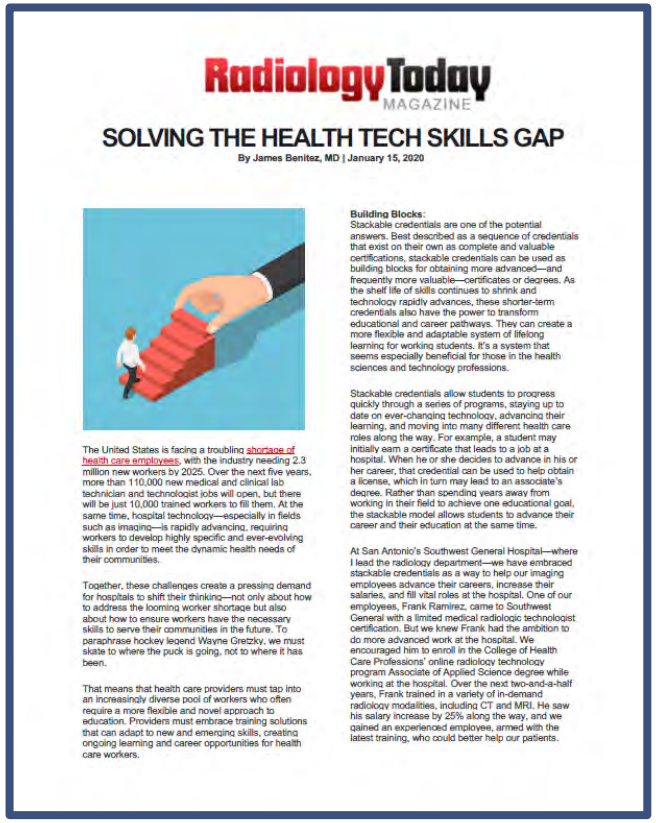
Solving the Health Tech Skills Gap



Radiology Today MAGAZINE

SOLVING THE HEALTH TECH SKILLS GAP

By James Benitez, MD | January 15, 2020

The United States is facing a troubling shortage of health care employees, with the industry needing 2.3 million new workers by 2025. Over the next five years, more than 110,000 new medical and clinical lab technician and technologist jobs will open, but there will be just 10,000 trained workers to fill them. At the same time, hospital technology—especially in fields such as imaging—is rapidly advancing, requiring workers to develop highly specific and ever-evolving skills in order to meet the dynamic health needs of their communities.

Together, these challenges create a pressing demand for hospitals to shift their thinking—not only about how to address the looming worker shortage but also about how to ensure workers have the necessary skills to serve their communities in the future. To paraphrase hockey legend Wayne Gretzky, we must skate to where the puck is going, not to where it has been.

That means that health care providers must tap into an increasingly diverse pool of workers who often require a more flexible and novel approach to education. Providers must embrace training solutions that can adapt to new and emerging skills, creating ongoing learning and career opportunities for health care workers.

Building Blocks:
Stackable credentials are one of the potential answers. Best described as a sequence of credentials that exist on their own as complete and valuable certifications, stackable credentials can be used as building blocks for obtaining more advanced—and frequently more valuable—certificates or degrees. As the shelf life of skills continues to shrink and technology rapidly advances, these shorter-term credentials also have the power to transform educational and career pathways. They can create a more flexible and adaptable system of lifelong learning for working students. It's a system that seems especially beneficial for those in the health sciences and technology professions.

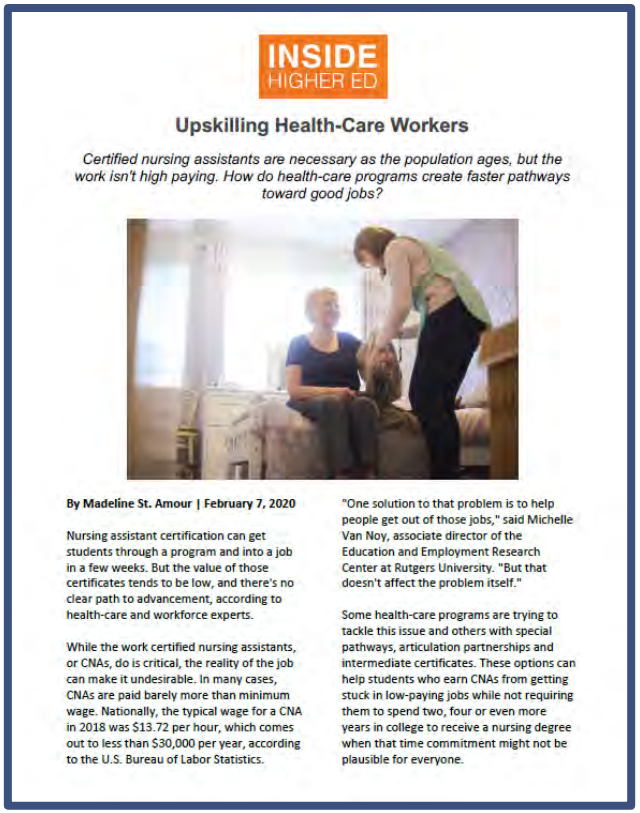
Stackable credentials allow students to progress quickly through a series of programs, staying up to date on ever-changing technology, advancing their learning, and moving into many different health care roles along the way. For example, a student may initially earn a certificate that leads to a job at a hospital. When he or she decides to advance in his or her career, that credential can be used to help obtain a license, which in turn may lead to an associate's degree. Rather than spending years away from working in their field to achieve one educational goal, the stackable model allows students to advance their career and their education at the same time.

At San Antonio's Southwest General Hospital—where I lead the radiology department—we have embraced stackable credentials as a way to help our imaging employees advance their careers, increase their salaries, and fill vital roles at the hospital. One of our employees, Frank Ramirez, came to Southwest General with a limited medical radiologic technologist certification. But we knew Frank had the ambition to do more advanced work at the hospital. We encouraged him to enroll in the College of Health Care Professions' online radiology technology program Associate of Applied Science degree while working at the hospital. Over the next two-and-a-half years, Frank trained in a variety of in-demand radiology modalities, including CT and MRI. He saw his salary increase by 25% along the way, and we gained an experienced employee, armed with the latest training, who could better help our patients.

"At San Antonio's Southwest General Hospital—where I lead the radiology department—we have embraced stackable credentials as a way to help our imaging employees advance their careers, increase their salaries, and fill vital roles at the hospital."

- James Benitez, MD

Upskilling Health-Care Workers



INSIDE HIGHER ED

Upskilling Health-Care Workers

Certified nursing assistants are necessary as the population ages, but the work isn't high paying. How do health-care programs create faster pathways toward good jobs?

By Madeline St. Amour | February 7, 2020

Nursing assistant certification can get students through a program and into a job in a few weeks. But the value of those certificates tends to be low, and there's no clear path to advancement, according to health-care and workforce experts.

While the work certified nursing assistants, or CNAs, do is critical, the reality of the job can make it undesirable. In many cases, CNAs are paid barely more than minimum wage. Nationally, the typical wage for a CNA in 2018 was $13.72 per hour, which comes out to less than $30,000 per year, according to the U.S. Bureau of Labor Statistics.

"One solution to that problem is to help people get out of those jobs," said Michelle Van Noy, associate director of the Education and Employment Research Center at Rutgers University. "But that doesn't affect the problem itself."

Some health-care programs are trying to tackle this issue and others with special pathways, articulation partnerships and intermediate certificates. These options can help students who earn CNAs from getting stuck in low-paying jobs while not requiring them to spend two, four or even more years in college to receive a nursing degree when that time commitment might not be plausible for everyone.

"One solution to that problem is to help people get out of those jobs," said Michelle Van Noy, associate director of the Education and Employment Research Center at Rutgers University. "But that doesn't affect the problem itself.“

- Madeline St. Amour

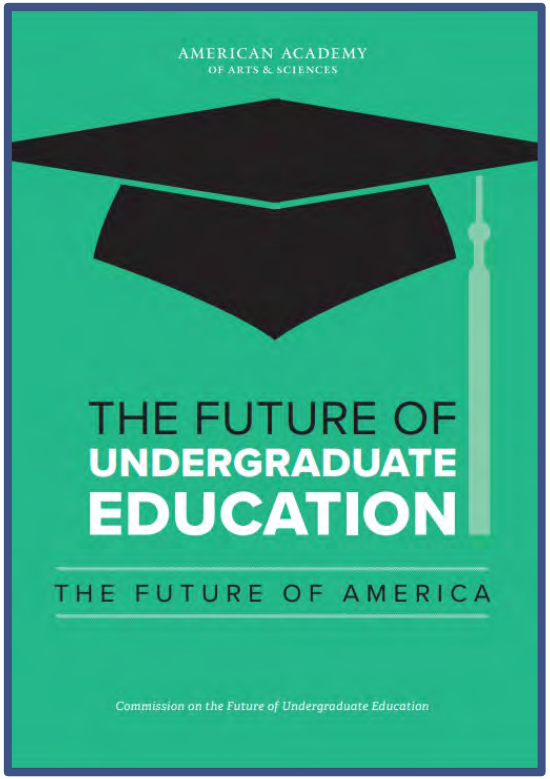
Three key “Disconnects in Life-Long Career Education!”

1. Students are choosing to learn outside the formal education system

- Often results with no recognized credential
- Prevents Career Pathways

-Pearson Education Survey

2. Colleges must provide quality programs resulting in real change



- Strengthening the student education experience
- Increasing completion and reducing inequities
- Controlling costs and increasing affordability.

-2017 Commission on the Future of Undergraduate Education

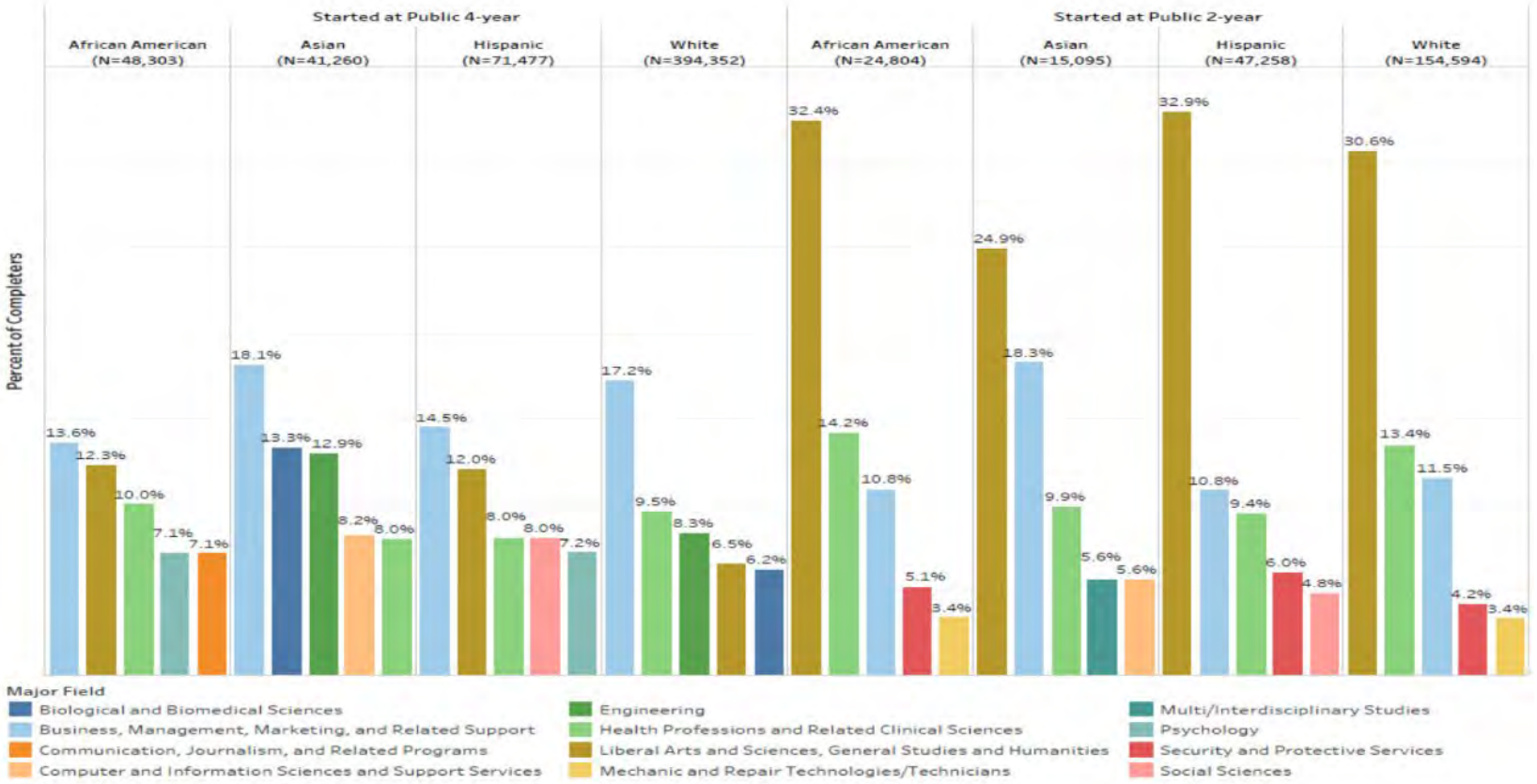
3. Quality Education is key:

“We have to understand more about how students learn, about how to develop and support effective teaching at the college level; and about how to ensure that we are truly educating students, not just providing them with credentials.”

-Michael McPherson and Sandy Baum, *Daedus*

The “Free College Movement” is changing the role of Community Colleges.

Figure 8. Top Five Common Majors at Completion by Race/Ethnicity and Starting Institution Type: 2013 Entering Cohort



2019 National Student Clearinghouse

Thus: A New Picture of Postsecondary Career Education!

In Summary:
The Future of Career Education:

A. Technology will guide the design and delivery of our academics
B. But on-site/experiential learning is an essential component for good outcomes
C. Quality in career education academics is the new focus. Outcomes will guide us.
D. Providers will be a new combination of public/private non-profit/proprietary/business. The provider will not be the issue: Outcomes and quality programs will!
E. This is no longer about Access! It is all about Outcomes!

The Critical Role of Employers:

Successful Career Education begins and ends with Employers!

- Schools are in the business of preparing graduates for employment.
- Academics begin with employers sharing skill demands.
- The Education concludes with employers hiring graduates!

Employer Advisory Committees:

- The foundation for successful career education quality!
- Provide work-based learning opportunities for students.
- An excellent marketing resource for the quality of your school.
- Ensure curriculum relevance
- Provide feedback on program design, competencies, and employment.

Modernizing our Public Policies for Tomorrow's Career Education:

A. Transparency of Programs: Not Schools, but Programs!
   - Graduation Rates
   - Time to Completion
   - Average Debt at completion
   - Average Income 5 – 10 years in career
   - Repayment Rates
   - Placement in field of Study
   - Potential of program in building a Career Pathway
   - Schools will be held accountable for Outcomes!

Modernizing our Public Policies for Tomorrow's Career Education:

B. Some troubling current measurements:
   - Only 42% of students who enter 2-year programs have earned a credential 8 years later.
   - 80% of Community College students intend to get a BA degree.
     - Only 25% actually transfer
     - Only 17% of those who do transfer earn a BA degree w/in 6 years.

C. Outcome metrics must be for all programs that produce some type of career skills, including BA and higher programs.

D. Short-Term Pell needs to focus on short-term learning. Outcome standards will be essential to prevent fraud.

Modernizing our Public Policies for Tomorrow's Career Education:

E. A "modern HEA" will:

- Give schools more authority to manage student debt
- Require Financial Literacy programs
- Enable federal aid to cover payment for prior learning assessment
- Enable schools to employ flexibility – as long as outcomes are maintained/increased
- Grants and loans will be available for high-quality, non-institutional programs including apprenticeship and employer-based training
- Incentives and new policies to enhance Credit Transfer – especially for Career Pathways
- Increase Dual enrollment programs with high schools to accelerate career preparation.

In Conclusion:

Strategies for your school's future in Career Education!

For your School's Success:

- Focus on the 25 – 45 age group
- Develop new partnerships (High Schools, Employers, other Education Institutions)
- Embrace the growth of Micro-Credentials
- Insure your school's commitment to Outcomes and Transparency
- Public-Private Partnerships are here to stay: Adapt!

Modernizing our Public Policies for Tomorrow's Career Education:

"Borrowers should select schools and programs that lead to good jobs and whose costs are commensurate with the salaries for their industry of choice.

Then colleges, having enrolled the right students in the right programs, must proactively develop relationships with employers to co-design relevant curricula that meet our country's need for skilled workers."

Johnny C. Taylor

President and CEO of the Society for Human Resource Management (SHRM)

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