Higher Education 3.0

SUMMARY: Traditional educational models are under tremendous pressure as changes in work, technology, and student expectations demand both new curricula and new modes of instruction. Higher education is facing new threats of disintermediation by online education and alternative credentialing systems. While the knowledge economy places a premium on analysis and thinking, it is also creating new alternatives to the university that threaten to transform how students receive postsecondary instruction.

Forecasts

- While top-tier educational programs are relatively unthreatened, online education and alternatives like massive open online courses (MOOCs) could pose a significant challenge to lower- and mid-tier colleges. Private sector acceptance of alternative credentials could amplify the challenge.
- Bifurcation among fields of study—between those degrees requiring access to campus facilities and those that are earnable from anywhere—may grow.
- The meaning of college is in flux, with traditional college models increasingly out of step with a lifelong learning orientation. Additionally, debate about the value of college as a social institution versus college as an arena for professional training will grow.

Key Uncertainties

Levels of public funding for research

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The role of MOOCs and microlearning in higher education

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The affordability of higher education

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Who holds the power to credential

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Role and influence of tech philanthropists

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Financial return on college educations

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Supporting Trends

- **Colleges and universities under pressure.** Enrollment at U.S. colleges has been flat or falling; by one measure, enrollment peaked in 2010 and has fallen every year since, dropping fastest at for-profit colleges and community colleges.
- **The new apprenticeships.** U.S. government support for apprenticeships is significantly expanding, with a planned doubling of federal funding for apprenticeship programs and a goal of 4.5 million apprenticeships by 2022—almost 10 times the total in 2016. The new apprenticeships are meant to benefit U.S. employers as well as workers at all skill levels via paid, certified career-training opportunities at registered organizations.
- **Growth of MOOCs.** Massive open online course offerings and participation continue to grow as the MOOC model is refined.
- **Microlearning.** Microlearning is becoming increasingly popular for corporate training, in part because the format can be readily adapted to meet the growing demand for training content on mobile devices.
- **Community college opportunities.** Student debt concerns, skepticism about for-profit colleges, and the need for flexible programs are making community colleges increasingly attractive to prospective students.
- **Student debt growing.** Student loan debt is growing, with important consequences for both students and institutions.
- **Proliferation of credentials.** The number and types of credentials beyond traditional academic degrees are rising.

Related Drivers of Change

- Microlearning
- Mentoring 2.0

Notable Data Points

OLDER LEARNER INCREASE

From 2014 to 2025 the number of higher education **students older than 25 is expected to increase by 18%.**

Source: National Center for Education Statistics

MOOC GROWTH

MOOCs have grown from 160,000 participants at one university in 2011 to **35 million participants at 570 universities in 2016.**

Source: Online Course Report, State of the MOOC 2016

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Strategic Insights

- Alternative credentialing, microlearning, and other direct-to-learner digital education give associations a growing opportunity to play a role as trainers and educators.
- Associations may increasingly need to look beyond university programs as an entry point for recruiting new members. Membership qualifications may need updating to reflect the evolving educational landscape.
- Associations could play a driving role in reshaping higher education. Pressure to reform curriculums to better reflect the needs of the field could potentially catalyze reforms and overcome structural resistance to change.
- Associations may need to look beyond traditional educational institutions to promote effective education and training. This will require identifying relevant alternative institutions and finding ways to build relationships with them.
- Many students do not follow a traditional pathway through four-year education into careers. New academic pathways need to be created to serve the needs of these learners. Associations could meet these needs if academia is unwilling to change. Associations could expand their continuing education programs, adapting them to provide direct-to-learner instruction for a certification or alternative credential.

Timing

- **Stage:** Emerging
- **Speed:** Medium, slowed by large-scale social institutions and habits

Potential Alternative Futures

- **Education as infrastructure:** Public funding of higher education is renewed as a way to foster the breakthroughs and innovations that fuel new industries.
- **Student debt forgiveness:** Given that U.S. students have accumulated $1.3 trillion in student loan debt, with much owned by the federal government, student debt forgiveness is adopted as a future form of economic stimulus.
- **Closing the education tax loophole:** Schools with billion-dollar endowments find it increasingly challenging to defend their status as tax-free nonprofits.

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Take Action

- **Move fast when universities move slow to update curricula.** Associations can have greater flexibility to address emerging issues and competencies, try new learning formats that offer greater accessibility and applied learning, and partner with different types of organizations as education providers.
- **Become the credentialing source employers trust.** Define the essential competencies and assess whether new institutions, online courses, and innovative approaches adequately prepare students. This may require updating unnecessarily rigid requirements about years of education completed and how learning experiences are sequenced.
- **Help prospective students navigate their education options.** If you accredit educational institutions, help students discern where they can trust they will find quality education. Some associations may want to disclose non-accreditation or actively combat low-quality programs. Associations can illustrate potential career pathways and provide advice on how and where to acquire necessary competencies.
- **Partner with new education providers.** Collaborate with universities, individual academics, and corporations offering virtual education that can meet member needs. Many technology companies are eager to help people gain proficiency in emergent skill areas.
- **Defend investments in academic research.** More associations will prioritize advocating for government, corporate, and foundation research funding. Association foundations may step up to organize and underwrite basic research for their field.
- **Learn from the innovators.** Successful MOOCs are pioneering online education that provides impressive reach, innovative experiences in collaborative learning, and extensive curation of digital knowledge resources. Some associations and think tanks choose to call their education programs "universities" to establish a brand for substantive content and learning experiences.

Keyword Search

To continue researching this change driver, use these search terms:
virtual education, online instruction, cyber schooling, online college, MOOC, school, digital education, edX, Coursera, Udemy, certification, credentials

Who Will Be Affected

Most vulnerable are professional associations and scientific and technical societies with many academic and student members. Academics may be less able to engage as leaders and content experts. Fewer higher education institutions may subscribe to journals and knowledge resources. Online university and other entrepreneurial offerings may compete with professional development programs. Credentialing organizations will have to decide which programs to certify as qualified education sources among this growing array of options.

About ASAE ForesightWorks

ASAE ForesightWorks is a deliberate, evidence-based research program and emerging line of products to provide association professionals with a continual stream of intelligence about the changes facing the association industry, including:

- regularly updated action briefs;
- tools for applying insights from the research in your association;
- guidance in performing environmental scans; and
- opportunities to engage with peers around the research.

Ultimately, the program's mission is to empower association leaders to create a culture of foresight.

Check **asaecenter.org/ForesightWorks** and follow **@ASAEfdn** on Twitter for updates on new findings and events.

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