

**ICUS/Faculty Leadership  
Washington's Higher Education Ecosystem  
Script for Webinar**

**Welcome and Introductions (Slide 1)**

- Welcome and thank you for attending Washington's Higher Education Ecosystem Webinar hosted by the Council of Presidents Interinstitutional Committee on Undergraduate Studies
- My name is Julie and I am the Director of Policy and Academic Affairs for the Council of Presidents. I will be narrating the webinar today. At the end I will be joined by institutional representatives to the Interinstitutional Committee on Undergraduate Studies to engage in further discussion and questions.

**Background (Slide 2)**

- Higher education in Washington is an ecosystem. We are a large living community focused on higher education linked together through cycles, policies, people and processes.
- This webinar is intended to provide a shared understanding of Washington's higher education ecosystem, the disruptors and fundamental changes our sector is facing.
- Together we will explore Washington's higher education ecosystem, how Washington and our sector compares nationally and higher education disruptors impacting our sector and how institutions, the state and other states and institutions are responding.

**Institutions and Degrees Offered in Washington (Slide 3)**

- Washingtonians have access to over 520 institutions offering a range of post-high school credentials.
- This includes:
  - Washington's six public baccalaureate institutions, four campuses; multi-institutional partnerships in Everett and Spokane, academic partnerships with 21 community and technical colleges; and robust online opportunities
  - Washington's 34 community and technical colleges
  - One tribal community college, Northwest Indian College
  - 10 private, nonprofit institutions. Example: Gonzaga University

- 11 other institutions are continuously exempt from state authorization and reviewed by the Washington Student Achievement Council (WSAC). Example: Bastyr University
- 44 other in-state private and out-of-state public and private institutions are authorized to have a physical presence in Washington where authorization applies only to specific programs, locations, or activities the institution requested for authorization. Example: Perry Technical Institute
- Western Governors University
- Nine institutions are authorized to advertise and recruit in the state for programs offered via distance learning or at out-of-state campuses. Example: Walden University
- Thirteen institutions are authorized to offer field placements in Washington as part of distance learning programs. Example: are Boston University
- Five institutions are conditionally exempt. Example: Oregon Institute of Technology
- 51 seminaries and church-related colleges and programs are exempt from state authorization. Example: Faith Christian College
- Approximately 325 private career schools in Washington are licensed and regulated by the Workforce Training and Education Coordinating Board. Example: Divers Institute of Technology
- Cosmetology and barbering schools must be licensed by the state's Department of Licensing
- And finally, the Washington Student Achievement Council is responsible for the review, evaluation, approval, and oversight of schools and training facilities to ensure state and federal quality criteria are met for veterans using their G.I. Bill® funds

#### **U.S. Secondary and Postsecondary Credentials (Slide 4)**

- By 2020, 65% of all jobs in the United States will require at least some postsecondary training.
- This underscores a general message for students that education beyond high school is increasingly important but does not necessarily require a degree.
- In response, the modality and type of credentials has also expanded in recent years.
- According to Credential Engine, a non-profit whose mission is to create credential transparency, reveal the credential marketplace, increase credential literacy, and empower everyone to make more informed decisions about credentials and their value, there are over 700,000 postsecondary credentials offered in the United States.
- This includes:
  - 324,743 degrees defined as associates', bachelor's, master's, doctoral and specific professional degrees for both Title IV and non-Title IV institutions. A Title IV institution is one with a written agreement with the U.S. Secretary of

Education that allows an institution to participate in Title IV federal student financial assistance programs.

- 45,277 certificates defined as a type of award conferred by a college, university, or other postsecondary educational institution certifying the satisfactory completion of a non-degree program of study. for both Title IV and non-Title IV institutions.
- 7,132 MOOC Providers which include microcredentials degrees from foreign universities and course completion certificates
- 315,067 Non-academic Organizations which includes occupational licenses, industry-recognized certifications, military certifications, registered apprenticeships, unregistered apprenticeships, coding bootcamp course completion certificates, online course completion certificates and digital badges
- 46,209 Secondary Schools which includes public school districts diplomas and private schools' diplomas.

### **Swirling (Slide 5)**

- A common perception is that a student's path to a credential is a smooth, linear progression from application to enrollment to general education to major to graduation to employment/graduate or professional school.
- The reality for a growing number of students is broadly defined as non-linear. This may include enrollment in multiple institutions, credit accumulation from multiple sources and types of credit, changes to majors and educational goals while attending school or returning to school.
- In addition, students are balancing college with the multiple demands of life such as, but not limited to, work, families and insecurities (i.e. homelessness, food, etc.)
- Finally, we are experiencing within our sector an increase in the number of students, including both students direct from high school and transfer students, who enroll at one of Washington's public baccalaureate institutions with some form of prior credit from a range of sources including concurrent enrollment, college preparatory programs with exams, military and transfer college credit.

### **Washington vs. Other States (Slide 6)**

- Higher education in Washington is an ecosystem which also lives within a national higher education ecosystem.
- Washington's public baccalaureate sector and the state itself compare both well and less well within the national context as the following slides illustrate.

### **Forecast Growth (Slides 7 and 8)**

- The forecasts for growth by institution type varies
- In his book, *Demographics and the Demand for Higher Education*, Nathan Grawe uses the Higher Education Demand Index (HEDI) he developed to estimate the probability of college-going using basic demographic variables.
- Using Grawe's HEDI, he shows growth between 2012-2029 west of the Mississippi, with larger declines in regions more populated by elite colleges and universities.
- A less consistent level of growth is forecasted, using the same model, for regional four-year institutions during the same time with declines again in the mid-west and northeast, lower declines in the southeast, southwest and northwest. With growth in some western states and California.
- Finally, the overall forecasted growth in college-going students is similar to the predicted growth for regional four-year institutions, limited growth in some part of the country but overall mostly declines.

### **Degree Production National Comparison Charts (Slides 9-11)**

- Washington ranks nearly last for Participation in 4-year public higher education at the undergraduate level
- Washington also ranks near the bottom for public bachelor's degrees produced per 1,000 population aged 20 To 34 years.
- Yet, Washington is a national leader in bachelor's degrees produced per 100 full-time enrollment (FTE) students at public baccalaureates.
- Washington ranks 1st in the nation for the percentage of transfer students who begin at a community or technical college and earn a bachelor's degree and 5<sup>th</sup> in the nation for the average rate by which a community college student earns a credential before transferring to a 4-year institution.
- To summarize Washington experiences a low college going rate to public baccalaureate institutions. However, our sector is a national leader for completion of students who attend our institutions, both as transfer and direct from high school.

### **Student Demographic Changes (Slide 12)**

- Nationally, the population is expected to be majority-minority population by 2045.
- Washington will slightly lag behind this timeline with a targeted year of 2056 according to current forecasts.
- In Washington it is worth noting that this school year's first grade class are the first to be majority-minority. They will be the high school graduating class of 2031.
- Within this larger context, migration of Washington students out-of-state is a particular concern for Washington. Overall, Washington is a net importer of baccalaureate degrees.

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### **Disruption Increasing (Slide 13)**

- The rate of disruption at the national, state and institutional level is increasing.
- We are experiencing this in Washington with changes in state policies, accreditation standards and expectations, institutional personnel, student demographics and expectations and institutional policies and practices.

### **Catalysts for Disruption (Slide 14)**

- We have identified four major catalysts for disruption.
  - State and national patterns
  - Evolution & disruption of delivery of curriculum and types of credentials
  - Transitions and funding
  - Changing demographics

### **Factors Underlying the Catalysts (Slide 15)**

- There are multiple factors that underly the four major catalysts of disruption
  - Fewer traditional age students
  - Value, affordability & student debt
  - Consolidations, mergers & acquisitions
  - Traditional markets challenged
  - Evolution & disruption of delivery models
  - Sector Financial Outlook (Moody's)

### **Changing Demographics (Slide 16)**

- Washington represents a relatively small percentage of the high school graduates in the western United States, approximately 9 percent.
- The growth in high school graduates is projected to slightly increase by 10.6% between 2011-12 and 2025-2026 in Washington.
- In addition, the racial and ethnic diversity of high school graduates is expected to continue to change with a decline in the white student population and an increase in the population of individuals who identify as students of color.
- This connects to the larger anticipated change in student demographics in Washington towards a minority-majority population overall.

### **Washington Freshman Enrolling Out of State (Slide 17)**

- As stated earlier, Washington is a net importer of baccalaureate degrees.
- Twenty-one percent of students that would be eligible college freshman chose to enroll in an out-of-state institution
- This is an increase over the last decade.
- The top five states Washington resident freshman eligible students enroll, in order of popularity, include Oregon, California, Idaho, Montana and Arizona.

### **Out-of-State Freshman Enrolling at Washington's Baccalaureate Institutions (Slide 18)**

- Over the last decade, Washington has also experienced an increase in out-of state students attending institutions.
- Between fall 2006 and 2016 there was an 89% increase.
- During this time Washington resident freshman increased 21%.
- Overall, freshman students from out-of-state represented 42% of all non-resident freshman in Washington in fall 2006 and increased to 50% in fall 2016.

### **Academic Preparation (Slide 19)**

- In Washington we are also experiencing a lack of academic preparation, especially when we look at academic preparation through an equity lens.
- According to the National Assessment of Educational Progress (NAEP), which is a congressionally mandated project administered by the National Center for Education Statistics (NCES) within the U.S. Department of Education and the Institute of Education Sciences (IES), Black and Hispanic students are less academically prepared compared to their White and Asian peers.
- This is illustrated in the top chart. The average for all 8<sup>th</sup> graders for example for Math is 287. White and Asian/Pacific Islander reported scores of 294 and 309; Black and Hispanic students reported scores of 257 and 269.
- This is echoed in Washington's four-year graduation rates for high school students, with Black, Hispanic and American Indian/Alaska Native students taking longer to graduate than their White and Asian/Pacific Islander peers.

### **Transfer Students & Success Gaps (Slide 20)**

- Community and technical college transfer students, historically, have played an important role in the enrollments at Washington's public four-year institutions.
- More than 80% of Washington community and technical college students who transfer come to one of our institutions.
- Nearly 40% of students who earned a baccalaureate degree from one of our institutions began at a community or technical college.
- Despite our sector's national leadership in moving transfer students to completion, too few community and technical college students obtain a degree and transfer
- Nationally, Washington ranks near the bottom for the rate at which community and technical college transfer students transfer to a four-year institution.
- This is even more stark when we look through an equity lens.

### **Transfer Students and Running Start Students (Slide 21)**

- Over the last five years, post Great Recession, Washington has experienced a steady decline of transfer students.
- Between academic year 2014-15 and 2018-19, Washington's community and technical colleges experienced a 9% decline in transfer students.
- Several factors contribute to the decline in transfer students from Washington's community and technical colleges including a decline in enrollments, transfer policy, strength of the U.S. economy, availability and accessibility of four-year college/university programs and alternative degree paths such as BAS degrees, Western Governors' University, for-profit institutions and online programs.
- At the same time, Washington's community and technical colleges have experienced a 39% increase in Running Start students.

### **Responding to Disruptions (Slide 22)**

- Washington is not alone. States across the country are experiencing similar disruptions around enrollment, demographics and competition.
- The following slides provide a high-level overview of the policies, practices and processes Washington's public baccalaureate college and universities, Washington, and other states and institutions are considering or have implemented in response to the catalysts of disruption to higher education.

### **Curriculum Design and Delivery (Slide 23-24)**

- Institutions and states are implementing and considering initiatives focused on curriculum design, teaching pedagogy, the delivery of post-secondary education and student outcomes.
- In this area, our sector has and is considering a range of potential changes to practices, policies and processes including investments in data-analytic advising platform, co-curricular transcripts and vertical career counseling across an institution.
- At the same time Washington has implemented or invested in efforts to reduce barriers for students attaining a college degree as a means of addressing changes to curriculum. Examples include support for Baccalaureate of Applied Science degrees, guided pathways at the community and technical colleges and dual credit at the high school level.
- The trends and foci of these initiatives can also be seen in other states and institutions including transferability across states and institutions with the Passport Initiative from WICHE or re-imagining general education through programs such as Stanford's *Thinking Matters* initiative and University of Berkley's *Big Ideas* courses.

### **Affordability (Slide 25-26)**

- Institutions and states are implementing and considering initiatives focused on affordability.
- In this area, our sector has committed to providing need-based institutional aid. This is evidenced in continuous ranking of Washington as top ten low student debt state, in a sector loan default rate that is less than half of the national rate; and in the graduation of over half of the Class of 2018 without any debt accrued at one of our institutions.
- At the same time Washington is a national leader in its support of need-based aid and addressing student debt. Washington ranks second in the nation for need-based aid and in recent years the Legislature has passed a suite of bills to address student loan debt.
- The trends and foci of these initiatives can also be seen in other states and institutions including College Promise programs, student loan forgiveness and investments in need-based aid.

### **Meeting the Needs of the Economy (Slide 27-28)**

- Institutions and states are implementing and considering initiatives focused on meeting the needs of the economy and preparing students for success once they leave college.
- In this area, our sector has a strong history of working with advisory boards to inform degrees and institutions are looking at pathways to guide students through to degree completion and beyond.
- At the same time Washington has made investments in STEM education and guided pathways as well as support for initiatives such as Career Connect Washington and increased awareness about apprenticeships.
- The trends and foci of these initiatives can also be seen in other states and institutions including career connections P-20 and adult learner programs.

### **Connecting the Higher Education Ecosystem with Olympia (Slide 29)**

- Responses to the disruptors facing higher education, as the prior slides illustrate, can be considered to have common goals and targets.
- However, the policies and practices implemented may lead to unexpected barriers and opportunities that may not align with the stated or intended goals and targets.
- We invite you to join us for the next webinar in which we will take a deeper dive into the policymakers, finances and policies influencing Washington's higher education ecosystem.
- Save the date for January 17 from 11:30-1:00

11/13/19

### **Discussions & Questions (Slide 30)**

- Thank you, Presenters,
- Now we will open it up to questions and discussion.