

# UNIVERSITY ENVIRONMENTAL SCAN SUMMER 2017 Brenau Office of Research and Planning

# **ENVIRONMENTAL SCANNING**

Environmental Scans are an important part of planning as they take stock of the changing external environment – the opportunities, the threats, the developments that could impact the institution reaching its potential and fulfilling its mission. It should be noted that, although an important part of long-term planning, scans' value may be more appropriately considered "tactical". In any case, an Environmental Scanning "science" has developed with a common language and several canons of categorization. For example, the practice of environmental scanning has come up with conventions for grouping environmental factors: **Society** (demographics), **Technology, Economy, Environment**, and **Politics** (STEEP).



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# **EXECUTIVE SUMMARY**

Traditionally, environmental scans are arranged around the topics of **Society**, **Technology**, **Economy**, **Environment** and **Politics** (**STEEP**).

- Society: It appears college attendance will continue to increase through 2024.
- **Technology**: We start by taking the 30,000 Ft. view. When all is said and done, two big-picture issues remain: 1) With disruption the rule and constant growth so inevitable (note Moore's Law) are we even able to predict technology trends? 2) If the coming "disruption" to higher education is technological, why have tech applications been so disappointing so far?

In any case a recent report identifies these trends in technology as relates to teaching and learning –

- Adaptive Learning Technologies;
- Mobile Learning;
- The Internet of Things;
- Next-Generation LMS;
- Artificial Intelligence; and
- Natural User Interfaces.

These tech trends happen to all relate in some way to **learning analytics**, which, itself, has been identified as a hot tech trend for several years now – at least as far back as 2012. **Learning analytics** is the use of big data by campuses to "understand drivers of performance across both academics and student life". (LoudCloud brochure) This year's Environmental Scan will explore Learning Analytics interface.

• Economics: The economy seems to put a higher and higher premium on college education. Why exactly, will the national economy tend to rely more on an educated workforce over those with no- or low-skills? In this scan, we drill down to the foundational components of a modern economy to understand what the economy has people actually doing. In other words, we examine why the business services sector (financers, lawyers,

advertisers, consultants, HR professionals, etc.) within each economic segment continues to increase as a proportion of that industry's workforce.

- Demand will continue to grow for **health care workers** (broadly defined and including nurses, physical- and occupational-therapy professionals.)
- Higher educators might study the association of gender with certain job sectors and might well examine indirect effect which that association may have on college attendance (if college is seen as preparation for girly jobs!)
- Environment: Campus sustainability is developing some conventions: Moving goals from net neutrality to "net-positive"; scrutiny on power contracts and tougher negotiations with electric utilities (including threat of non-renewal), and even tighter focus in general on "emissions-related" impacts of campus activity.
- **Politics:** Scholars and social critics are laying blame for gaps in appreciation and understanding of civics principles and democratic values. Higher education is one target. Breitbart and other far-right media are known for taking aim at colleges, but, indeed, criticism along those same lines of **political correctness** and **coddling** is increasingly coming from the **mainstream**. It appears society might well expect higher education to acknowledge validity of many of society's criticisms (since society has a stake). In any case, many express frustration that the Academy won't tolerate or consider criticism, and indeed apparently feels no obligation to even recognize the irony related to charges of intolerance, suppressed thought, and closed-mindedness.

The focus of a scan is, of course, external (student markets, technological change, economic trends, and political threats). Yet scans ultimately look inward – how will factors impact *this* institution? That inward perspective can serve as a blinder to key elements in the larger context. This year's scan (unlike previous ones – please see <u>Research and Planning: Facts Page</u>) seeks a broad perspective, including expectations of higher education. It

also looks at cultural reactions to higher education on culture: What if the cost of higher education (and debt) can indeed do society harm? Colleges might well consider challenges for our sake and our constituents'. Such a 30,000 ft. view might compel us to measure success in terms additional to (other than) mere institutional survival.

# **SWOT ANALYSIS**

The science of environmental scanning began in the 1970s, and the science has evolved, but a key aspect which has proven useful to colleges throughout is: the Strengths, Weaknesses, Opportunities and Treats (SWOT) categories – which are especially useful in supporting strategic planning. This spring, Brenau University managers helped identify institutional Treats, Opportunities, and Weaknesses. These are listed below in the Appendix 1- Appendix 4.

# ENROLLMENT

### **Trends in College-ready Population:**

An obvious beginning of any environmental scan is examination of population of college-ready students.



Data extracted from Table 10, Projections of Education Statistics (Hussar and Bailey 2016)

The data show a peak of sorts around 2018-2019 (which would positively impact Brenau the next year) followed by a gradual trough. A climb will begin around 2020 which increase pretty steeply through to 2024-2025.

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Of course, "the story about demographics for colleges and universities is much more complicated than a single line that tracks high school graduates." While the South has grown more quickly in this subpopulation, the other areas of the country have declined. Increasingly, universities and colleges in the West, the Midwest and the Northeast are recruiting across regions. (Selingo 2016)

One of these questions is college participation.



(These data are unpublished for now but will be released in upcoming SREB report. Used here by special permission of SREB. Additional information may later be found at SREB Factbook Tables page when updated.) (Lounsbury 2017) Participation rates seem to continue to climb. Thus, observable currents (number of graduates X matriculation rates) portend no threat. Certainly another factor to watch is the composition of the college-ready population. The demographers assume the share of white students will decrease and the gap will be made up of Hispanic students. (Selingo 2016) Recent developments in politics may challenge this assumption.

Figure 21. Actual and projected numbers for enrollment of U.S. residents in all degree-granting postsecondary institutions, by race/ethnicity: Fall 1999 through fall 2024



https://nces.ed.gov/pubs2016/2016013.pdf

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### Figure 16. Actual and projected numbers for total enrollment in all degreegranting postsecondary institutions: Fall 1999 through fall 2024



In a nutshell, despite the changing (e.g., racial and ethnic) dynamics within the population of college-aged, college enrollment overall is nonetheless predicted to trend upward in the foreseeable future. Please see chart above from ...(Hussar and Bailey 2016)

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### Georgia: Non-traditional aged college prospects

Even though an increasing number of this 25 an older population are getting degrees, and the percentage of those in the baccalaureate or higher "attainment" category grows, in fact the real number of people in this sector without degrees (prospects for higher education) will likely continue to grow. This is a function of overall growth. The numbers look like this::

Date	Georgia	Attainment	Difference in real #s	Portion
1970	2,355,810	218,948	2,136,862	9%
1980	3,085,528	450,267	2,635,261	15%
1990	4,023,420	777,158	3,246,262	19%
2000	5,185,965	1,260,178	3,925,787	24%
2005-2007	5,945,347	1,578,689	4,366,658	27%
2006-2008	6,069,802	1,640,314	4,429,488	27%
2007-2009	6,155,887	1,684,388	4,471,499	27%
2008-2010	6,154,545	1,685,250	4,469,295	27%
2009-2011	6,243,020	1,710,587	4,532,433	27%
2010-2012	6,326,651	1,754,259	4,572,392	28%
2011-2013	6,403,956	1,801,222	4,602,734	28%
2015	6.683.767	2,000,113	4.683.654	30%

Population 25 and older

In Georgia the segment aged 25-49 has consistently remained around 40 percent of the total population and has grown (and will likely continue to grow) in real numbers.

Source: Susan Lounsbury SREB

# **TECHNOLOGY:**

# The big picture: Technological Advance an unknowable

We might want to step back and try to look at technological trends from a higher altitude. To do this, we might look at what columnist Thomas Friedman calls the "accelerations".

- One acceleration that is taking place in the market is digital globalization. This is not your grandfather's globalization. That was containers on ships. Everything is now being digitized and globalized, whether it's through Twitter, Facebook, PayPal, or—within education—through MOOCs [massive open online courses]. If you chart this on a graph, it looks like a soaring hockey stick.
- Mother Nature is a **second** force. This includes climate change, biodiversity loss, and population growth; and if you mark that activity on a graph, it also looks like a soaring hockey stick.
- The **third** force is Moore's law. Back in 1965, Intel co-founder Gordon Moore predicted that the speed and power of microchips would double roughly every 24 months. That timing is now closer to every 30 months, but the reality of that prediction is still going strong 52 years later. And this doubling, doubling, doubling, is really the driver of all technological change today. (Yiman 2017)

While all of Friedman's accelerations involve technology is some way, we might infer that tech is still a significant element of an environmental scan, and we might well note that technological trends beg for at least as much emphasis in our future-casting as social, economic and political. At the same time, we might reserve judgement on tech predictions in this climate of unpredictability implied by these accelerations.

Another important point: higher education applications of technology have yet to prove themselves at all. Hunter Rawlings, President of the AAU, observers: "MOOCs [massive open online courses] and other online instruments seemed to offer a quick, cheap fix for the notoriously inefficient nature of academia. Never mind that the quality of these courses is still suspect, completion rates are ridiculously low, and they violate almost every principle research has taught us about the best ways for students to learn." (Rawlings 2016)

# Key Trends Accelerating Technology Adoption in Higher Education

A critical source for those trying to determine technology trends is the NMC Horizon Report. (Adams Becker et al. 2017) Brenau researchers have depended on this source throughout the years in various scans. A summary of the trends reported from this source is here:

Developments in Technology	2012	2013	2014	2015	2016	2017
Learning Analytics						
Adaptive Learning Technologies						
Games and Gamification						
The Internet of Things						
Mobile Learning						
Natural User Interfaces						
Bring Your Own Device						
Makerspaces						
Flipped Classroom						
Wearable Technology						
3D Printing						
Tablet Computing						
Artificial Intelligence						
Next-Generation LMS						
Affective Computing						
Augmented & Virtual Reality						
Robotics						
Quantified Self						
Virtual Assistants						
Massive Open Online Courses						

As seen in this chart, the predictions of the annual NMC Horizon documents (surveys jointly conducted by New Media Consortium and the EDUCAUSE Learning Initiative) recur but are not static.

### Important Developments in Educational Technology for Higher Education

The technology developments which the members of the expert panel agreed are very likely to drive technology planning and decision-making over the next five years, are sorted into three (3) categories — near-term developments that are expected to achieve widespread adoption in one year or less; mid-term developments that will take two to three years; and far-term developments. A key criterion for the inclusion of a new topic was its potential relevance to teaching, learning, and creative inquiry in higher education.

- Time-to-Adoption Horizon: One Year or Less: Adaptive Learning Technologies; Mobile Learning
- Time-to-Adoption Horizon: Two to Three Years: **The Internet of Things; Next-Generation LMS**
- Time-to-Adoption Horizon: Four to Five Years: Artificial Intelligence; Natural User Interfaces

The reader is encouraged to reference the entire report, both for fuller descriptions of each of these six trends as well and discussion of the (Delphi) method of research whereby these trends were deduced. For purposes of the Scan, we've provided here only thumbnail summaries of the six trends identified in last month's report:

Adaptive Learning: Think Netflix and Amazon: the machine learns things about you and couples these preferences to learning analytics (analysis of best practices) to interactively guide the (online) student through a learning path optimized for success. For example, adaptive learning company CogBooks and Arizona State University studied the impact of next-generation adaptive courseware in a flipped introductory biology course and two online history courses. "After using CogBooks for one semester, student success rates rose from 76% to 94% and the dropout rate reduced from 15% to 1.5%." (CogBooks 2015) While efforts are not advancing as quickly as in the US, this technology is also being explored in England and Norway. (Adams Becker et al. 2017)

Mobile Learning: "...m-learning enables learners to access materials anywhere, often across multiple devices. Convenience is driving demand for this strategy, with potential for new mobile-enhanced delivery models that can increase access to education. Teachers are harnessing the capabilities of mobiles to foster deeper learning approaches by creating new opportunities for students to connect with course content." Kenya's Daystar University has launched Daystar Mobile, a program in which students can earn a bachelor's degree in education primarily through their smartphones. Mobile learning is about flexibility and convenience (away from synchronous courses fixed in time and place. However, it is also being incorporated into traditional onground courses. Students in an experiment at a UK university used iPads to access Real Bodywork Muscles and Skeletal 3D apps during class, which encompass quiz and game functions to improve learner retention. Feedback indicated that students found the technology "fun" and preferred the hands-on experiences to the lecture format; the iPad cohort also earned better grades. (Wilkinson and Barter 2016) [Note: Brenau has made great strides in this.]

The internet of things: The Internet of Things (IoT) consists of objects endowed with computing power through processors or imbedded sensors that are capable of transmitting information across networks. These connections allow remote management, status monitoring, tracking, and alerts. Municipal governments and education institutions are applying the capabilities of IoT, leveraging data to streamline processes and promote sustainability. Connected devices are generating data on student learning and campus activity, informing the direction of content delivery and institutional planning. But the big IoT story for higher education is how well Higher Education will rise up to the challenge of (offering STEM programs to) training students about Iot hardware, infrastructure, security, and mobile applications.(Adams Becker et al. 2017). Employers will look for these IoT abilities in recent graduates of all kinds of colleges and universities.

Next-Generation Learning Management Systems [LMS]: More faculty and students leverage tools such as Google Apps, WordPress, Slack, and iTunes U, but these apps are generally accessed outside of LMS. Furthermore, gamification, adaptive learning, and OER are just a few examples of technology developments that institutions are adopting to bolster student success and increase affordability. (It would be great to have standard back ends to LMS platforms to allow institutions to accommodate these.) Also, the growth of adaptive learning technologies (see above) is also expanding the possibilities for a wealth of data LMS are able to collect and analyze. Smart Sparrow, for example, enables educators to customize highly visual content for their classes' needs and then track how students are engaging with the material, flagging common mistakes and misconceptions. The promise of next-generation LMS is that this kind of data will be seamlessly aggregated with student demographic, grades, social presence, and other data points to provide a more holistic picture of learning progress. Another area of interest is platforms that [interactively] curate a whole world of [opensource] resources for self-directed learning.

Artificial Intelligence: An overarching goal of artificial intelligence is to bolster productivity and engagement, better supporting the global workforce and individuals in their daily lives. This makes this technology promising for higher education, especially as teaching and learning increasingly take place online. Adaptive learning, featured earlier in this report, leverages basic AI algorithms to personalize learning, delivering content that best suits students' needs based on performance and engagement with the subject matter. As institutions gather an increasing amount of data on student learning, they also need tools to mine and analyze it at scale; machine learning enterprise software including Jenzabar and IBM SPSS help colleges and universities interpret the data to support student retention, improve financial aid programs, and predict future enrollment. Emerging approaches like competency-based education will require more sophisticated forms of AI to assess concrete skill acquisition, such as the 3D modeling and prototyping of a car, to provide tailored feedback. In pursuit of greater personalization in higher education, thought leaders such as Bill Gates champion AI tutors.

Natural User Interfaces: To understand natural user interfaces, it's helpful to start with examples. Of course, we're all familiar with voice command interfaces. Haptic (touch) applications in anatomy studies allow medical students to engage with digital patients in a realistic manner (since cadavers are limited.) This technology is already augmenting the robotic surgery already taking place by helping surgeons "feel" through robotic arms. Think holographic systems that help students more accurately visualize the childbirth process. NUIs enable users to engage in virtual activities with movements similar to what they would use in the real world, manipulating content intuitively. There is a rising level of interactive fidelity in systems that understand gestures, facial expressions, and their nuances, as well as the convergence of gesture-sensing technology with voice recognition. While there are many applications of gesture and voice recognition already, developments in haptic technology, tactile sensations that convey information to the user, are creating new areas of scientific inquiry and application.

### **Learning Analytics**

It should be noted that these 6 technologies mentioned above either directly or indirectly support "learning analytics", a process that helps colleges "understand drivers of performance across both academics and student life". The correlations of behaviors with "performance" make possible a range of possibilities. It's useful to Note: the "mainstream" learning analytics services available so far (e.g., that come out of Grand Canyon, for example) assume the "outcome" to be maximized (correlated with student behaviors) is retention. So, their claim that they correlate behaviors to student outcomes might be more accurate – for academic disciplines – if the analysis looked behind actual achievement (e.g., standardized measures of knowledge or ability). The term "performance" can seem richer than the rather dry outcome they actually measure.

So, learning analytics enable:

- **Research into pedagogy and curriculum in general** As colleges appropriate common learning management systems, sample sizes can grow to multiple institutions. Patterns of causation between student behavior and student success can be established which inform more permanent set-up of course order, content, etc.
- **Research into pedagogical aspects of specific courses as** we isolate student activities that lead to in-course success and track course activity real time to make modifications (e.g. on LMS) even while course is ongoing.
- **Direct Student Interventions** Dashboards allow faculty or administrators to view various aspects of individual student performance, identify those at-risk, and even set up interventions (communications with individuals) targeted to specific student deficit, and even track the intervention.

To get away from abstractions and better understand one facet of this we might employ some visualization. So, faculty and advisors can quickly identify at-riskstudents and gain real-time insight into student performance using a broad-based composite score.

~	Student Name $\sim$	Last Av Access <del>v</del> Sco	erage ore <del>–</del>	Last Intervention -	-	Financial Accounting	Human Resource Management	Hospitality Management	Management of Science	
	Roberts Andy VERY HIGH RISK	05/12/2017 05:48 AM	13	05/15/2017 09:22 PM	7	86	87	85	88	
	Williams Sean VERY HIGH RISK	05/12/2017 06:01 AM	20	05/15/2017 09:22 PM	P	81	84	81	86	
	Caboclo Bruno VERY HIGH RISK	05/12/2017 06:20 AM	31	05/15/2017 09:22 PM	7	68				
	Taylor Brendan HIGH RISK	05/12/2017 06:05 AM	45	05/15/2017 02:17 PM	P	68	56	67	63	
	Martin Chris	02/16/2017 08:43 AM	56	05/15/2017 02:17 PM	P		56	78	30	
	Boyce Keith HIGH RISK	05/11/2017 07:47 AM	35	05/15/2017 05:32 PM	7	60				
	Williams Henry HIGH RISK	02/10/2017 12:13 PM	62	05/15/2017 02:17 PM	7		39	37	73	
	Bennett Anthony HIGH RISK	05/12/2017 06:13 AM	32	05/15/2017 05:32 PM	P	57				
_	Show More ~									

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	Roberts Andy Class: Financial - Financial Acc SIS ID: Email: Roberts.Andy@yopmail. Phone:	ounting 🗸	<b>∞</b> 7	Send Message Add Notes	Ę
ļ Cur	rrent Score	21%	<ul> <li>Average score of the class</li> <li>95.0% of students have a l</li> <li>Top 10% of students average</li> </ul>	is 59.05% Nigher score ge at 87.65%	
! Risł	k Profile	86	<ul> <li>Average risk level of the c</li> <li>5.0% of students are at sin</li> <li>25.0% of students are at t</li> </ul>	lass is 48 nilar risk levels he highest risk levels	
! Sys	tem Access Frequency	05/12/2017 (day of last access)	<ul> <li>Average frequency of accordays</li> <li>Top 25% of the students a days</li> <li>Bottom 25% of the studen days</li> </ul>	ess of the class is 11.5 times per 152 ccess the system 14.8 times per 152 ts access the system 8.4 times per 15	2
! Effo	ort	0:59hrs spent online	<ul> <li>Average time spent per st</li> <li>Top 25% of the students sp</li> <li>Bottom 25% of the student</li> </ul>	udent in class is 1:52 hrs oent 3:12 hrs online on average Is spent 0:47 hrs online on average	

the composite score into more detailed risk categories. This can be used to help infer the source of a particular concern. Looks like Andy's doing ok on the risk factor of "Communication Frequency"

 Communication Frequency between Student and Instructor (within LMS)
 16 Messages (messages sent by student)
 Average frequency of the class is 12.15 messages per 152 days
 Top 25% of students communicate 15.0 times per 152 days Interventions allow you to select from a library of messages/notes which can be sent to groups or individual students.

Saved Interventions          Tips to improve performance         Hey - Your performance level has not been upto th         Performance to be monitored         Please do a close monitoring of your performance         Need to discuss	To: * Subject: * Description: * Attachments:	All Selected Students Well done!! After the last discussion, you have shown a tremendous improvement in your performance. Well done! BROWSE No Attachment(s) Selected	9
Critical assessments not submitted Some of the critical assessments have been missed		Individual File Size Limit Per Upload: 10 MB Permissible File Types: pdf, ppt, pptx, xls, xlsx, doc, docx, txt, jpg, jpeg, bmp, png, gif, html, tiff, ppm, pgm, pbm, pnm, wav, aiff, au, mp3, wma, m4a, m4p, 3gp, mp4, 3g2, 3gp, asf, avi, flv, mov, mp4, mpeg, rm, swf, wmv	
Well done!! After the last discussion, you have shown a treme	Fields marked as * are	mandatory SEND SAVE AND SEND CANCEL	e e

	031372017 10:11
My Notes	8
Created By Me	Created By Others
	📩 Download
MAY 15	ROBERTS ANDY   MANAGEMENT OF SCIENCE
Risk Score 🛕	RISK SCORE: 88
	Andy has not been able to attend class due to work issues. We discussed it and he's seeking alternatives.
	REVIEW NOTES (1)
	More ≫
MAY 15	ROBERTS ANDY   INDUSTRIAL ECONOMICS
Risk Score 🛕	RISK SCORE: 77
	Andy has not been able to attend class due to work issues. We discussed it and he's seeking alternatives.
	REVIEW NOTES (1)
	More ≫
MAY 15	ROBERTS ANDY   HUMAN RESOURCE MANAGEMENT
Risk Score 🛕	RISK SCORE: 87

Heat maps show changes in strength and direction of a factor. This particular map demonstrates changes within the composite index score.

King Reon	Villa David	Chetty Tris	Williams Se	Bennett Ant		
Boyce Keith	Brandy Dave	Caboclo Bru	Cavani Edin	Clark Belin		
Cole Ashley	Evra Patric	Fields Jod Ch	berts Andy ange (%): +2.38 urrent Risk Score:	Martinez Ja 86		
Taylor Bren	Wright Crai	Pro Hart Joe	evious Risk Score Roberts And	Taylor Staf		

Watch lists automate the process of communicating critical concerns to key stakeholders in the learning process. Choose from hundreds of pre-defined conditions and set the "value of concern". Alerts and notifications can be sent to your phone, email, or just assembled within your own online report.

Financial : Financial (Dec 14, 2016)						1	Change
CRITICAL REPORTS ALERTS	WATCHLIST	MESSAGES	CLASS DASHBOARD	STUDENT DASHBOARD			
							🛅 Delete
Report Name 👻	Raised On 👻	Applicable To	Para	ameter(s)	Value of Concern	Current Value	
Search	Search	Search	Se	earch	Search	Search	
Student Composite Risk Score per Day	03/14/2017	Artificial Datome Luigi	Da	itome Luigi	36	55	
Student Composite Risk Score per Day	03/14/2017	Artificial Adams Steven	Ad	lams Steven	37	62	

In conclusion, it might be noted that Learning Analytics may ultimately have very little to do with "learning" so much as it has a lot to do with business models of enrollment-based educational institutions interested in retaining students: The outcome to be maximized by analyzing inputs is persistence to degree. Those factors which help retain students are identified (and students directed to them). So far, precious little of the programming behind learning analytics applies to assessing accomplishment of complex skills, abilities, knowledge, values or attitudes (in order to distill which inputs correlate with those.) Rather, learning analytics enables the centuries-long trend of breaking college into a series of tasks to be checked off. It seems to reinforce pedagogy which deconstructs coursework into discrete checkboxes.

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# **ECONOMICS**

### Endowments: Alternative investments

New research sheds more light on the issue of endowment investments in "alternatives." Over the last few years (and even through the economic downturn a decade ago), those large college and university endowments who shifted their asset allocation to alternative investments (including hedge funds, private equity and venture capital) leveraged superior returns. "The endowment model" -- linked to Yale's CIO Swenson –holds that the key driver behind the gap between select large institutions and smaller funds is explained by the ability to *access* high performing alternative asset funds (due to their large size). A recent article in Business Officer, suggests that, while endowment size does impact amount of access to alternative investments, much of the difference among institutions in best leveraging these investments relates to **expertise** of members on investment committees.

... our analysis indicates that there have been important trends in asset allocation for endowment funds of all sizes from 2004 to the present. The most important trend has been away from traditional "long-only" investments in public securities toward alternative investments of various types. This trend has coincided with a trend toward larger and more-experienced investment committees. Importantly, our research reveals that substantial investment committee experience in alternatives seems to be linked to better performance in alternatives, not just to higher allocations in alternatives. These effects are strongest among large endowments. Overall, these results suggest that, on average, endowment fund returns can benefit from having an investment committee that includes individuals with substantial expertise in alternative assets.

Incidentally, these findings are possible because data now allows researchers to isolate the degree to which expertise captures something not already explained (by controlling for other variables.) "After controlling for these factors, the results show a substantial and statistically significant link between expertise and allocations... The allocation to alternative investments increases by approximately 2 percent for each additional member with experience in alternatives." (This allocation shift comes primarily from commensurate reductions in the allocations to domestic equity and fixed-income.) (Binfare et al. 2017)

### State of the Economy

A recent (April '17) report from the International Monetary Fund (IMF) forecasts sunny skies, with some dark patches:

Global economic activity is picking up with a long-awaited cyclical recovery in investment, manufacturing, and trade... World growth is expected to rise from 3.1 percent in 2016 to 3.5 percent in 2017 and 3.6 percent in 2018. [Building on gains seen in both manufacturing and trade.] Stronger activity, expectations of more robust global demand, reduced deflationary pressures, and optimistic financial markets are all upside developments. But structural impediments to a stronger recovery and a balance of risks that remains tilted to the downside, especially over the medium term, remain important challenges...(Milesi-Ferretti and Stankova 2017)

With persistent structural problems—such as low productivity growth and high income inequality—pressures for inward-looking policies [protectionism] are increasing in advanced economies. These threaten global economic integration and the cooperative global economic order that has served the world economy, especially emerging market and developing economies, well. Against this backdrop, economic policies have an important role to play in staving off downside risks and securing the recovery, and a renewed multilateral effort is also needed to tackle common challenges in an integrated global economy. (Milesi-Ferretti and Stankova 2017)

This recent [April 2017] IMF World Economic Outlook examines intensively the downward trend in the labor share of income since the early 1990s. The forces behind this trend include 1) technological progress, 2) the elasticity of substitution between capital and labor (related to automation), and 3) the association of "rising participation in global value chains increasing capital intensity in production", particularly in emerging market and developing economies. (Milesi-Ferretti and Stankova 2017)

Note, this year's edition of the Brenau Scan will devote an unusual amount of attention to this phenomenon: **participation in value chains**. It so happens this month's IMF report emphasis on labor's share of income mirrors a recent report from Georgetown related to why college-education continues to grow as a hedge on higher salaries.

In any case, the IMF World Economic Outlook goes into detail on the trend of labor's declining share of income.

# Figure 3.1. Evolution of the Labor Share of Income (Percent)

The labor share of income has been on a downward trend in both advanced economies and emerging market and developing economies.



This phenomenon has many indirect and direct potential impacts on colleges, including reducing ability for (middle class) families to pay for college, less direct connection between education and social/economic improvement, etc.

### **Report: Center for Education and the Workforce**

Some highlights of the report *Recovery: Job Growth and* Education *Requirements through 2020* (Carnevale, Smith, and Strohl 2013b)

- The report found that there will be 55 million job openings in the economy (2013) through 2020:
  - 31 million openings due to baby boomer retirements
  - o 24 million openings from newly created jobs
- Job openings in healthcare, community services, and STEM will grow the fastest among occupational clusters
- By educational attainment:

#### NATIONALLY

- By 2020, **65%** of the jobs in the nation will require postsecondary education (by comparison, this number was 28% in 1973, 56% in 1992, and **59%** in 2010)
  - By 2020, 33 percent of jobs will require some college, an associate's degree, or a postsecondary vocational certificate
  - By 2020, 23 percent of jobs will require a bachelor's degree
  - By 2020, 11 percent of jobs will require a master's degree or better
- By 2020, only 34% of the jobs in the nation will require a high school diploma or less (down from more than 40% in 2010)

#### GEORGIA

For the State of Georgia (Carnevale, Smith, and Strohl 2013a)

- By 2020, 65% of the jobs in Georgia will require postsecondary education
  - By 2020, 33 percent of jobs in GA will require some college, an associate's degree, or a postsecondary vocational certificate
  - By 2020, 22 percent of jobs in GA will require a bachelor's degree
  - By 2020, 10 percent of jobs in GA will require a master's degree or better
- By 2020, 35% of the jobs in Georgia will require a high school diploma or less
- By 2020, the United States will fall short of workers with postsecondary education—at the current production rate—by 5 million.

#### A decades-long trend: Labor market favors the college-educated

Why are some segments (which may be more reliant on college-education and higher skills) creating jobs – and other sectors not creating jobs? Much has to do with the evolution of the economy: a shift of consumption away from goods and toward services since the 1940's (as we shall see, a shift which corresponds to declines in demand for less-well educated) In any case, the phrase in the report above -- "participation in global value chains" – begs for a closer look.

Two main drivers in the shift to a high-wage service economy

- We have shifted consumption from goods to services.
- The production of goods has dropped below 15 percent.



Source: Georgetown University Center on Education and the Workforce analysis of data from the U.S. Department of Commerce, Bureau of Economic Analysis, 1947-2011. Primarily, this evolution has to do with efficiency. One might ask, how the economy continues to produce stuff amply when fewer of us are actually producing things? For illustration, the agriculture segment is instructive: "Almost 20 percent of the value added in the food network comes from bankers, insurance firms, advertisers, and other business services involved in bringing final food output to the table." This partly explains why "there has been a large decline in low-skill jobs that require a high school education or less" and corresponds to a "substantial growth in managerial and professional jobs requiring college degrees."(Carnevale and Rose 2015b) The shift is a result of gradually-increasing automation/efficiencies and increasingly relying on minerals doing our work for us.

Also, "As economies have grown more efficient, we've been able to focus less on needs and more on wants. And it's the dramatic expansion and evolution of those wants – and how our economy fulfills them – that explains so much of the change in post-industrial America." (Carnevale and Rose 2015a)

Food and clothing (and personal care items) were responsible for 45 percent of consumption in 1947 and just 18 percent in 2007. Correspondingly, "among consumption categories in which the share of spending rose, healthcare led the way, growing from 5 percent of spending in 1947 to 20 percent of private consumer and government spending in 2007. Other gainers were recreation (going from 8 percent to 14 percent), business services (doubling from 4 percent to 8 percent), government (going from 9 percent to 12 percent), and housing (growing slightly from 19 percent to 20 percent). With the exception of recreation, the growing sectors had high levels of well-paid managers and professionals." We might consider how this (management-ification of society) might happen even in, say, construction or primary production (farming, mining, fishing): for one thing, these are becoming more corporatized.

Also, a ready source of (alien) labor which is more vulnerable to exploitation makes possible more (e.g., construction) businesses whose principles can be in management (e.g. HR) and less applied to actual production activity. Thirdly, the social pressure toward a college degree could spur this as people with college diploma refuse to perform more manual (applied) duties. In other words, "Office employment grew between 1967 and 2007 because of economy-wide changes in production recipes that favored white-collar and professional functions." (Carnevale and Rose 2015a)

"Business services in 1967 contributed a small share of the direct and indirect workforces of every output category except one, business services sold to individuals. In any case, the employment share of this business services "super sector" increased by at least 9 percent in each output sector except for food, education and health care [presumably because these areas were more saturated by business server providers] The biggest gainer isn't even visible to the typical consumer: It's the export sector ...and the heavy reliance on business services to coordinate, finance, and administer the export of other goods."

The support of the export/import business is just one reason why the business services super sector now plays a dominant role in the American economy, and it includes a wide variety of tasks:

- Professional services such as consulting, legal services, accounting/ bookkeeping, architecture, design, and scientific and technical research
- Administrative and support services, such as employment services, facility support (including security and building maintenance), office equipment maintenance, and courier services; and
- Finance, insurance, and related activities. These services employ college-educated employees. (Carnevale and Rose 2015a)

Higher demand of college-trained labor, then, is in large part attributable to these trends explained in greater detail above:

- In the "production" sector, efficiencies in production: Almost all sectors, including food, clothing, housing, and other manufacture, employ more business services (e.g., accounting, customer service, IT, advertising, finance, insurance, etc.)
- And, also in the "production" sector, goods are increasingly imported. The corresponding increase in shipping activity also is responsible for lower demand for those directly involved in producing and greater demand for those who can support business services.
- In the "pure" service sector, demand for healthcare is increasing due to an aging Baby Boomer generation.

- Also in the service sector (that is, the sector of "Pure" services not supporting production), as Americans have gotten wealthier, more have required individual business services e.g. from personal financial services managing and protecting assets.
- In addition, the government services sector has increased (even after removing transfer payments such as Medicare, healthcare services, education, and infrastructure spending). Government jobs tend to require college education.
- A look at "super-sectors" also gives insight into why the economy increasingly prioritizes college education. "Office work" -- Managers in any field, Clerical and administrative workers in any field, Business professionals in any field (e.g., sales representatives, accountants), All workers in finance, insurance, real estate, and business services, All workers in public administration – and "High-skill services" -- All non-office workers in healthcare, education, communications and Police and firefighters – can be considered a "functional super-sector." This supersector grew in importance in the economy and, at present, employs about 81 percent of workers with a bachelor's degree and 91 percent with a graduate degree. (Carnevale and Rose 2015a)



FIGURE 1.4 Between 1967 and 2007, business services employment grew across final output categories.

Source: Georgetown University Center on Education and the Workforce analysis of data from the U.S. Department of Commerce, Bureau of Economic Analysis, *Input-Output Accounts* and U.S. Census Bureau, *Current Population Survey*, 1967-2007.

#### The association of work with gender

PBS Newshour presented "an overlooked story" which is of interest to higher education administrators: "why some men are not pursuing certain types of jobs that are mainly held by women." (Solman 2017) We might look at three explanations of why men don't want girly jobs.

- Betsy Stevenson, Council of Economic Advisors Member, "we need to recognize that there are a lot of guys who feel, either because their friends or their community or because of themselves, like, when they take one of these jobs that they are doing something girly. And that feeling is a barrier for them."
- Labor economist Teresa Ghilarducci (The New School) also says the stigma of women's work has a basis in reality." Female-dominated jobs are stigmatized because they're lower-paid. If we're going to attack patriarchy and stigma of women vs. men, then we should attack it on an economic basis, and use that old fashioned idea of comparable worth, bring up jobs that women have to the same level of the equivalent jobs or comparable jobs that men have."
- Jamie Browder believes there's something else—something more intrinsic to these jobs themselves. In elementary education, for example, he maintains there is not enough mobility and the job requires too much preparation and is low status. Also, men will have to get used to a new role being the nurturer.

The story of manly men not filling girly jobs may be of significance and not so easily dismissed as silly-sounding. For example, gender association with some professions has deep implications if we are to acknowledge the tectonic shift in our economy away from direct production and toward things like **office work, education** and health care. We have lost five (5) million jobs in manufacturing and gained nine (9) million jobs in education and health services. This has big repercussions for the economy and for higher education (in general and for Brenau University in particular.) If men don't see themselves serving in these careers, then men don't want to pursue certain college majors – or even college itself if college is seen only as qualification for entrance into girly professions. In any case, the cultural association of gender with certain jobs and the effect that association may have on how the jobs get filled will impact the educational path taken. Indeed, we can detect a gap between the sexes on degree completion

Figure 24. Actual and projected numbers for associate's degrees conferred by degree-granting postsecondary institutions, by sex of recipient: Academic years 1999–2000 through 2024–25



Figure 25. Actual and projected numbers for bachelor's degrees conferred by degree-granting postsecondary institutions, by sex of recipient: Academic years 1999–2000 through 2024–25



(Hussar and Bailey 2016)

### Fastest growing occupations

	Employment Change, 2014-24			2014-24	Median annual	
2014 National Employment Matrix title and code		2024	Number	%	wage, 2016 <sup>(1)</sup>	Education needed
Total, all occupations	150,539.9	160,328.8	9,788.9	6.5	\$37,040	
Personal care aides	1,768.4	2,226.5	458.1	25.9	\$21,920	No formal educational credential
Registered nurses	2,751.0	3,190.3	439.3	16.0	\$68,450	Bachelor's degree
Home health aides	913.5	1,261.9	348.4	38.1	\$22,600	No formal educational credential
Combined food preparation and serving workers, including fast food	3,159.7	3,503.2	343.5	10.9	\$19,440	No formal educational credential
Retail salespersons	4,624.9	4,939.1	314.2	6.8	\$22,680	No formal educational credential
Nursing assistants	1,492.1	1,754.1	262.0	17.6	\$26,590	Postsecondary nondegree award
Customer service representatives	2,581.8	2,834.8	252.9	9.8	\$32,300	High school diploma or equivalent
Cooks, restaurant	1,109.7	1,268.7	158.9	14.3	\$24,140	No formal educational credential
General and operations managers	2,124.1	2,275.2	151.1	7.1	\$99,310	Bachelor's degree
Construction laborers	1,159.1	1,306.5	147.4	12.7	\$33,430	No formal educational credential
Accountants and auditors	1,332.7	1,475.1	142.4	10.7	\$68,150	Bachelor's degree
Medical assistants	591.3	730.2	138.9	23.5	\$31,540	Postsecondary nondegree award
Janitors and cleaners, except maids and housekeeping cleaners	2,360.6	2,496.9	136.3	5.8	\$24,190	No formal educational credential
Software developers, applications	718.4	853.7	135.3	18.8	\$100,080	Bachelor's degree
Laborers and freight, stock, and material movers, hand	2,441.3	2,566.4	125.1	5.1	\$25,980	No formal educational credential
First-line supervisors of office and administrative support workers	1,466.1	1,587.3	121.2	8.3	\$54,340	High school diploma or equivalent
Computer systems analysts	567.8	686.3	118.6	20.9	\$87,220	Bachelor's degree
Licensed practical and licensed vocational nurses	719.9	837.2	117.3	16.3	\$44,090	Postsecondary nondegree award
Maids and housekeeping cleaners	1,457.7	1,569.4	111.7	7.7	\$21,820	No formal educational credential
Medical secretaries	527.6	635.8	108.2	20.5	\$33,730	High school diploma or equivaler
Management analysts	758.0	861.4	103.4	13.6	\$81,330	Bachelor's degree
Heavy and tractor-trailer truck drivers	1,797.7	1,896.4	98.8	5.5	\$41,340	Postsecondary nondegree award
Receptionists and information clerks	1,028.6	1,126.3	97.8	9.5	\$27,920	High school diploma or equivalen
Office clerks, general	3,062.5	3,158.2	95.8	3.1	\$30,580	High school diploma or equivaler
Sales representatives, wholesale and manufacturing, except						
technical and scientific products	1,453.1	1,546.5	93.4	6.4	\$57,140	High school diploma or equivalen
Stock clerks and order fillers	1,878.1	1,971.1	92.9	4.9	\$23,840	No formal educational credential
Market research analysts and marketing specialists	495.5	587.8	92.3	18.6	\$62,560	Bachelor's degree
First-line supervisors of food preparation and serving workers	890.1	978.6	88.5	9.9	\$31,480	High school diploma or equivalent
Electricians	628.8	714.7	85.9	13.7	\$52,720	High school diploma or equivalent
Maintenance and repair workers, general	1,374.7	1,458.1	83.5	6.1	\$36,940	High school diploma or equivaler
Footnotes:						
<sup>(1)</sup> Data are from the Occupational Employment Statistics program. U.S	. Bureau of	Labor Stati	stics.			
Source: Employment Projections program, U.S. Bureau of Labor Statist	ics					

#### Not as useful, but this table might also be of interest:

Table 1.3 Fastest growing occupations, 2014 and projected 2024 (Numbers in thousands)										
2014 National Employment Matrix title and code			Employment		, 2014-24	Median annual	Education needed			
2014 National Employment Matrix title and code		2014	2024	Number	Percent	wage, 2016 <sup>(1)</sup>				
Total, all occupations	00-000	150,539.9	160,328.8	9,788.9	6.5	\$37,040				
Wind turbine service technicians	49-9081	4.4	9.2	4.8	108.0	\$52,260	Some college, no degree			
Occupational therapy assistants	31-2011	33.0	47.1	14.1	42.7	\$59,010	Associate's degree			
Physical therapist assistants	31-2021	78.7	110.7	31.9	40.6	\$56,610	Associate's degree			
Physical therapist aides	31-2022	50.0	69.5	19.5	39.0	\$25,680	High school diploma or ec			
Home health aides	31-1011	913.5	1,261.9	348.4	38.1	\$22,600	No formal educational cre			
Commercial divers	49-9092	4.4	6.0	1.6	36.9	\$49,090	Postsecondary nondegree			
Nurse practitioners	29-1171	126.9	171.7	44.7	35.2	\$100,910	Master's degree			
Physical therapists	29-1123	210.9	282.7	71.8	34.0	\$85,400	Doctoral or professional d			
	45 00 44		40.4	40.4		<b>\$00 500</b>				

ccupational therapy assistants         31-2011         33.0         4/.1         14.1         42.7         \$59,010 Associate's degree           hysical therapist assistants         31-2021         78.7         110.7         31.9         40.6         \$56.610 Associate's degree													
Physical therapist assistants	31-2021	78.7	110.7	31.9	40.6	\$56,610	Associate's degree						
Physical therapist aides	31-2022	50.0	69.5	19.5	39.0	\$25,680	High school diploma or equivalent						
Home health aides	31-1011	913.5	1,261.9	348.4	38.1	\$22,600	No formal educational credential						
Commercial divers	49-9092	4.4	6.0	1.6	36.9	\$49,090	Postsecondary nondegree award						
Nurse practitioners	29-1171	126.9	171.7	44.7	35.2	\$100,910	Master's degree						
Physical therapists	29-1123	210.9	282.7	71.8	34.0	\$85,400	Doctoral or professional degree						
Statisticians	15-2041	30.0	40.1	10.1	33.8	\$80,500	Master's degree						
Ambulance drivers and attendants, except emergency													
medical technicians	53-3011	19.6	26.1	6.5	33.0	\$23,850	High school diploma or equivalent						
Occupational therapy aides	31-2012	8.8	11.6	2.7	30.6	\$28,330	High school diploma or equivalent						
Physician assistants	29-1071	94.4	123.2	28.7	30.4	\$101,480	Master's degree						
Operations research analysts	15-2031	91.3	118.9	27.6	30.2	\$79,200	Bachelor's degree						
Personal financial advisors	13-2052	249.4	323.2	73.9	29.6	\$90,530	Bachelor's degree						
Cartographers and photogrammetrists	17-1021	12.3	15.9	3.6	29.3	\$62,750	Bachelor's degree						
Genetic counselors	29-9092	2.4	3.1	0.7	28.8	\$74,120	Master's degree						
Interpreters and translators	27-3091	61.0	78.5	17.5	28.7	\$46,120	Bachelor's degree						
Audiologists	29-1181	13.2	16.9	3.8	28.6	\$75,980	Doctoral or professional degree						
Hearing aid specialists	29-2092	5.9	7.5	1.6	27.2	\$50,250	High school diploma or equivalent						
Optometrists	29-1041	40.6	51.6	11.0	27.0	\$106,140	Doctoral or professional degree						
Forensic science technicians	19-4092	14.4	18.2	3.8	26.6	\$56,750	Bachelor's degree						
Web developers	15-1134	148.5	188.0	39.5	26.6	\$66,130	Associate's degree						
Occupational therapists	29-1122	114.6	145.1	30.4	26.5	\$81,910	Master's degree						
Diagnostic medical sonographers	29-2032	60.7	76.7	16.0	26.4	\$69,650	Associate's degree						
Personal care aides	39-9021	1,768.4	2,226.5	458.1	25.9	\$21,920	No formal educational credential						
Phlebotomists	31-9097	112.7	140.8	28.1	24.9	\$32,710	Postsecondary nondegree award						
Ophthalmic medical technicians	29-2057	37.0	46.1	9.1	24.7	\$35,530	Postsecondary nondegree award						
Nurse midwives	29-1161	5.3	6.6	1.3	24.6	\$99,770	Master's degree						
Solar photovoltaic installers	47-2231	5.9	7.4	1.4	24.3	\$39,240	High school diploma or equivalent						
Emergency medical technicians and paramedics	29-2041	241.2	299.6	58.5	24.2	\$32,670	Postsecondary nondegree award						
Footnotes: (1) Data are from the Occupational Employme	nt Statisti	ics program	, U.S. Bure	au of Lab	or Statisti	cs.							
Source: Employment Projections program, U.S. Bureau of	of Labor St	tatistics											

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### **Discount rates:**

The average first-time, full-time tuition discount rate edged even closer to 50 percent in 2016-17 as net tuition revenue and enrollment struggled. (Seltzer 2017) In AY 2015-16, Brenau discount for the Day program was around 40%, and for all undergraduates about 25%.



Average Institutional Tuition Discount Rate, by Student Category

# **ENVIRONMENT**

Some sustainability practices emerging as conventions? Moving goals from net neutrality to "net-positive"; scrutiny on power contracts and tougher negotiations with electric utilities (including threat of non-renewal), and even tighter focus in general on "emissions-related" impacts of campus activity. It's helpful to keep tabs on key components campus sustainability in scanning the environment for ideas on efficiency and effectiveness. This year our scan seems to reveal some emphasis in the literature on these particular facets:

- **Bicycles**: One major reason colleges have large (some claim "largest") carbon footprints is single-occupancy vehicle traffic they generate. A recent article in Business Officer instructs campuses intentional about cultivating bike culture: build bike paths, restrict motor vehicle traffic in the core are of campus, incorporate bicycle considerations into planning (e.g., designing new buildings with eye toward pedestrian circulation routes), build roundabouts and (activated by pressing a button) also introduce scramble signals where bikes converge with autos, employ full time bike program coordinator, increase campus enforcement of bicycle infractions but offer online bike (regulation) courses as substitute for fines for first time offenders, address bike stealing (e.g. with GPS), use 75% of bicycle program budget for all things structural (path resurfacing, air-station and tool station upkeep, bike locker construction, etc.), encourage people not to drive alone (by providing a range of alternatives to single-occupancy vehicles.) (Contreras 2017)
- Leadership: Some tips: It's all about "wide" idea exchange and buy in. Include all aspects of climate science (not just earth systems) as well as those outside hard sciences. "Pull smartest people into the room" and also bring together faculty and staff "who otherwise might never had had the opportunity to work alongside one another" and encourage "interdisciplinary work among legal scholars, engineers and social scientists…"(Hignite 2017b); learn to be flexible and aim at moving targets (urgency may increase but technology improves); follow the science and model lots of ideas. "Campuses are ideal places to scale up and test proof of concept." (Hignite 2017a) CFO of Arizona State explains, "We felt it was important to set an audacious goal to energize people and focus institution activity."

[Editor's note: To "focus" an institution, it appears that these campuses still set goals in terms of carbon footprint. This common carbon operationalization will make possible intra-sector cooperation in the absence of leadership in Washington. Basically, the current state of sustainability might be summed up by an Appalachian State official, Jim Dees: First reduce needless energy consumption, Second, make more efficient the energy we do need. Third, review our energy sourcing with an eye toward increasing the share of renewables wherever we can. And finally, use offsets sparingly or as a tool of last resort" (Hignite 2017b)]

• Energy: Elemental to any sustainability plan is power. Universities are experimenting with microgrid development and energy storage solutions. These storage experiments include battery, chilled water and hydrogen. (Hignite 2017a) Electrical efficiencies can come through "squeezing additional efficiencies across each campus through ongoing lighting upgrades, reducing plug loads, and maximizing building controls. (Hignite 2017b)

# POLITICS

State politics impacts Brenau as our most local competitors are public schools. Here are majors offered in this region:

<b>Education</b> :	<b>Bachelor</b>	's programs	offered in	n this region
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#### Continued

CIP	Foreign Languages, Literatures, and Linguistics						cs	Legal	Professions and Studies	English Language and Literature/Letters							Biological and Biomedical Sciences			-	Mathematics and Statistics		Par Le and St	ks, R eisure Fitn tudie	ec, e, ess s	Physical Sciences					
Degree	Arabic Language & Literature	Chinese for Global	Chinese Language & Literature	French Language & Literature	French w/ Business	Spanish Language & Literature	Spanish w/ Business	Conflict Res. and Legal Studies	Paralegal Studies	English	Language and Literature	English - Interdisciplinary	Writing and Rhetoric	English w/Lit Concentration	English w/ Writing &	General Studies	Biology	Biology - Biochemistry	Biology - Cell Biology & Biotech	Math - Applied Math	Math (B.S.)	Math/Engineering Dual Degree	Health & Phys Ed	Health & Phys Ed w/ Exercise	Health and Phys Ed w/ Minor	Chem w/ Chemical Physics	Chemistry	Chemistry w/ Biochem	Chem-Professional Track	Physics	
Bren au								B A		B A						B S	B S														
GGC											В	В	В				B	B	B	B	B						B		В		
	D	D	D	D	D	P	D				A	A	A	P	D	P	S B	5	5	5	S R	D		P	P	P	S R	P	5	P	
Dahl	A	A	A	A	A	A	A							A	A	S	S				S	S		S	S	S	S	S		S	
UNG									В					В	В	В	В				-	-	В		-		-				
Gvil									AS					Α	А	S	S						S								

#### Continued

CIP	Devehology	rayunuugy						Soc	ial So	cienc	es						Visual and Performing Arts													
Degree	Psychology	Psychology [Pre-OT]	Criminal Justice	Criminal Justice w/ Forensics	Criminal Justice/Criminology	Economics	International Affairs	Political Science	Poli Sci - Comparative Politics	Poli Sci - American Gov	Poli Sci - American Politics	Poli Sci - Int'l Relations	Poli Sci - Legal Studies	Poli Sci with Pre-Law	Sociology	Strategic & Security Studies	Acting	Digital Arts	Graphic Design	Art Marketing	Dance	Fashion Design	Film & Digital Media	Music	Musical Theatre	Residential Planning	Studio Art	Theatre	Theatre Design and Technology	
Brenau	B	B															BF				В	BF		B	BF	B	BF	В	BF	
	S B	2			В	BB		В	В	В		В	В				A				A	A		A	A	A	A	A	A	
GGC	S				S	A		A	A	A		A	A																	
UNG	В		В	В			В	В			В			В	В	В		В	В	В				В			В			
Dahl	S		Α	Α			Α	S			S			S	S	Α		Α	Α	S				Α			А			
UNG	В							В							В								В				В		BF	
Gvil	S							S							S								S				Α		Α	

Continued.

CIP	Health Professions and Related Programs											usines	s, M	anage	ement	:, Mar Serv	ketin vices	g, an	d Rela	ted S	uppc	ort	History							
Degree	Sports Medicine	Exercise Sci - Wellness Promotion	Exercise Science - Clinical	Health Science	Health Science [Pre-OT]	Health Science [Pre-PT]	Health Science-PreNursing	Human Services Delivery & Admin	Nursing	Nursing R.N. to B.S.N.	Accounting	Business	Fashion Merch	Finance	Financial Economics	Human Resource Management	International Business	Management	Management Information Systems	Marketing	Organizational Leadership	Technology Management	Interdis/Thematic History	US History	Western Civilizations	World History	History	History/Poli Sci		
Bren				В	В	В	В		BS	BS	BB	BB	В		BB	BB				BB	В							В		
au				S	S	S	S		Ν	N	Α	A	A		Α	А				А	Α							А		
GGC		B S	B S						BS N		BB A			BB A			BB A	BB A	BB A	BB A			B A	B A	B A	B A				
UNG	В	-							BS		BB			BB				BB		BB							В			
Dahl	S								Ν		Α			А				Α		А							А			
UNG								В	BS		BB			BB				BB				BA					В			
Gvil								А	Ν		Α			Α				Α				S					Α			

# **Community Planning: New Neighbors**

These developments have been revealed recently. Indeed, the Downtown Center will likely get several new neighbors.



The Brenau Downtown center can be seen in this aerial photograph next to drawing of the proposed development.



On the "Fourth-Side" of the town center another development is underway, this on the North side of the Downtown Center.



"The Bridge" (seen near center) is adjacent to the Downtown Center (Brenau Physical Therapy department) and will connect the two midtown segments of the downtown deverlopment. Note orange rectangle.



Source: UGA Carl Vinson Institute of Government "Downtown Gainesville Renaissance Strategic Vision and Plan." (UGA Carl Vinson Institute of Government 2015)

### **Cause and Effect flipped**

A Politics section in a conventional scan – which usually focuses on the impact of state, federal, local and international laws and regulations (e.g., on financial aid.) But for this year's scan, we might flip the cause-and-effect and consider whether higher education is part of the cause of social sentiment and societal shift (which could have political consequences.)

### Value of Higher Education reduced to Individual Benefit (salaries)

Ron Selingo notes that higher education institutions increasingly focus on personal enrichment rather than social benefit. Higher educators themselves beg parents and student to evaluate college on Return on Investment (ROI). There are several factors behind this: Primarily, higher education institutions have to convince strapped parents and potential students to pay the high college costs. But there are also political pressures and economic trends behind this emphasis of the private over the public:

- "In 1983 the college wage premium was 42 percent. Today, it surpasses 80 percent...[thus], a college degree is seen as the only ticket to success, yet only 50 percent of students gain a bachelor's and nearly 50% of those find themselves underemployed.." Page 6 (Selingo 2016)
- Also, then President Obama announced that the U.S. Education Department would build a new data tool so that the public could better calculate the return on investment (ROI) of a college degree. This new College Scorecard, the president said, would allow students and parents "to compare schools based on a simple criteria: where you can get the most bang for your educational buck.".
- That Obama initiative unleashed many new college rankings (Economist, Money) and state efforts (Arkansas, Colorado, Minnesota, Texas, Tennessee, Virginia, and Washington) to compare colleges on *individuals*' economic outcomes.

"...the individual economic benefits of higher education are increasingly the leading measure for students, parents, and policy makers when it comes to calculating the return on investment of a college degree. That focus on the economic return on college is likely to gain more prominence, given how profoundly the world of

work is changing." Page 33 (Selingo 2016) Average returns on a degree are no longer good enough for consumers who want access to better data about what it will mean for them to earn a degree in a particular major from a specific institution. Colleges are complying and emphasizing individual economic benefits – private good – vs. the public purpose of "promoting more engaged citizenship and healthier societies." (Selingo 2016)

What is lost by overemphasizing the private- over the public purpose?

Amy Gutman notes that our newly-minted graduates enter the world without appreciation of the complexity of human problems and the fact that solutions are not easy, neat, or often plausible in appearance. Only high-quality higher education provides tools for building a more just, prosperous, and successful society. Can our graduates address issues of gridlock, climate change, global cooperation, health care, human rights, immigration, economic inequality, and poverty? Even inside the professions, do lawyers act ethically inside an adversarial system of justice, do businesspeople understand market principles don't always trump other considerations, and how do doctors operate ethically in an environment where payment games must be considered in choosing means of diagnosis, treatment, rehabilitation, and assignment of care? (Gutmann 2013)

Colleges have abdicated the responsibility to promote the role they play in service to society, in the advance of knowledge, in developing responsible citizens, in preserving institutions (of justice, of democracy, etc) in equipping citizens with the tools for "building a more just, prosperous, and successful society." Politicians, too, have abdicated, ironically, because as the primary source of funding for higher education, the federal government (public sector) makes no demands for colleges to advance their "public purpose." Politicians who are stewards of federal aid might appreciate its value if they consider benefits of higher education are for *both* personal *and societal progress*.

#### **Content at Issue**

In our current political culture, questions of democracy arise ranging from issues of free speech, to human rights to issues of authoritarianism. Thus, one area of public scrutiny is civics instruction. US Senator Ben Sasse (Republican of

Missouri) discusses a failure of educators. He is the author of *The Vanishing American Adult: Our Coming-of-Age Crisis --* and How to Rebuild a Culture of Self-Reliance.

We have a crisis of not understanding the First Amendment. Freedom of speech, press, assembly, religion, protest the right of redress of grievances. These are fundamental. These are the beating heart of the American Experiment. And we're not teaching it to the next generation. (Sasse 2017)

Senator Sasse is a former college president. So, as both an academician as well as a servant of society, he's in a unique position to see the Academy from both sides. He identifies a gap and strikes a chord with others in the academy who ask a range of questions along these lines: What if our alum are not encouraged to challenge leadership?; What if our alum are not encouraged to consider alternatives to American exceptionalism?; What if young college graduates feel no obligation to vote? Or, if they vote, do these new voters we graduate respect evidence?; What if students learn cynicism as a substitute or shortcut to rigorous critical thinking? ;What if colleges deny students opportunities to experience the transcendent (from the arts or from the magic of nature – human or otherwise) out of fear that it will be seen as discouraging, extravagant, or without utility toward careers?

### **Political correctness**

Much of the criticism of higher education relates to a perceived political correctness agenda on campuses. For an example:

Here's an empirical question: is there a point of no return, a straw that breaks the camel's back, a critical mass of dereliction that eventuates in the implosion of the Higher Ed establishment and its replacement by some more vigorous and responsible alternative? How many students at Yale have to be captured on video screaming at the master of their college over the issue of safe spaces and Halloween costumes? How many times does Charles Murray have to be shouted down and later be set upon by an angry mob that sends one of his companions to the hospital? How many outbreaks of violence at Berkeley must there be because—Racism? How

many buildings or programs need to be renamed because the judgment of the moment outweighs the commendation of tradition? The answer might be: there is no tipping point. (The New Criterion 2017b)

Higher educators might well consider their role as fueling the fires behind political boil-over flooding the national and international scene. While many academics might not make much of these rants, the conservative sentiment behind them might well be considered long and hard as an assault on common sense and logic. At least, higher educators might recognize the perception that we all feel we're above explanation. This is true particularly to certain issues. For example, voices from both sides of the spectrum are weighing in on colleges' indifference to ideals of free speech:

- From the **conservative** "New Criterion": Commenting on the student shout-down (aborted talk) of Charles Murray at Middlebury College, No one, we think, can watch that video of Murray's ritual humiliation and believe that Middlebury College fosters an environment hospitable to open debate. ... works to instill a rancid intellectual and moral conformity in its charges. It is not surprising that other institutions have copied Middlebury by denying "controversial" speakers a platform to speak. Just a few weeks ago, for example, McMaster University shouted down Jordan Peterson, a professor of psychology, because he refuses to use fabricated pseudo-pronouns for "transgender" students. (The New Criterion 2017a)
- From the **liberal** side, including comedian Bill Maher and other comedians such as Chris Rock and Jerry Seinfeld who have condemned oversensitivity of college students, saying too many of them can't take a joke." (Haidt 2015b)

And the battle lines get blurry. Last week, the Wisconsin State Assembly passed a bill imposing some serious sanctions such as suspension or expulsion for students who engage in, "violent, abusive, indecent, profane, boisterous, obscene, unreasonably loud or other disorderly conduct that interferes with the free speech of others". The putative purpose is to "protect free speech." However, some express doubt and point out that "by definition, protest is inconvenient and that it is a tool of people who feel that the conventional channels of discussion are not available to them or from which they are shut out....that that which is seen as inconvenient and wrong and rude today often in the light of history is seen in a very different light". At the minimum, it's a case where a state house will establish "free speech" laws which

colleges must enforce with suspension or expulsion. In any case, some believe the legislators behind the law were provoked by events where conservative speakers were shouted down. (Martin 2017)

In any case, in response to campus illiberalism, strident spokesmen of all stripes are rising up. Even outspoken civil rights defenders are reproving colleges for the assault on free speech and some are actually arguing for protection of hate speech.

"It is all too common these days for people to try to immunize from criticism opinions that happen to be dominant in their particular communities," reads a statement written by **Robert George** and Cornell West. "Sometimes this is done by questioning the motives and thus stigmatizing those who dissent from prevailing opinions; or by disrupting their presentations; or by demanding that they be excluded from campus or, if they have already been invited, disinvited... Of course, the right to peacefully protest, including on campuses, is sacrosanct. But before exercising that right, each of us should ask: Might it not be better to listen respectfully and try to learn from a speaker with whom I disagree? Might it better serve the cause of truth seeking to engage the speaker in frank civil discussion? ...[All] should be willing -- even eager -- to engage with anyone who is prepared to do business in the currency of truth-seeking discourse by offering reasons, marshaling evidence and making arguments,...The more important the subject under discussion, the more willing we should be to listen and engage -- especially if the person with whom we are in conversation will challenge our deeply held -- even our most cherished and identity-forming -- beliefs."

Such "an ethos," the statement concludes, "protects us against dogmatism and groupthink, both of which are toxic to the health of academic communities and to the functioning of democracies." (Flaherty 2017)

"The goal is a heightened sense among faculty, administrators and students -- all three categories -- that they must refuse to tolerate campus illiberalism," **George** said. "It's a shared responsibility of everybody to not only refuse to participate in it but to refuse to accept it. In order for colleges and universities to fulfill their missions, there has to be an ethos, an atmosphere, an environment, in which people feel free to speak their minds -- where people are challenging each other, and thus learning."

Yet college illiberalism continues to grow, in the view of George and West.**\*\* George** states that protection from hearing positions one disagrees with is exacerbated by an emergent "consumer model" of education, in which colleges and universities competing for enrollments don't want to offend their "customers," even if the product -- higher education -- is supposed to be "challenging students' deeply held convictions and helping them to lead examined lives."(Flaherty 2017) \*\*The new furor over "appropriation" might bear them out. Note <a href="https://www.washingtonpost.com/opinions/the-lefts-misguided-obsession-with-cultural-appropriation/2017/05/12/59e518bc-3672-11e7-b4ee-434b6d506b37">https://www.washingtonpost.com/opinions/the-lefts-misguided-obsession-with-cultural-appropriation/2017/05/12/59e518bc-3672-11e7-b4ee-434b6d506b37">https://www.washingtonpost.com/opinions/the-lefts-misguided-obsession-with-cultural-appropriation/2017/05/12/59e518bc-3672-11e7-b4ee-434b6d506b37</a> story.html?utm term=.1d79e93f0d3c (Will 2017)

It should be footnoted that the issue of political correctness may be a component of a more general context of indulgence. In more recent days, authors discuss coddling and make the observation that family and institutions are producing life-long adolescents. (For example, Senator Ben Sasse discusses the failure "to celebrate shared scar tissue." Sasse 2017). Here's an example of one opinion about infantilization:

"In addition to the 'repressive atmosphere' described by comedians, I saw ample evidence of the repressive atmosphere that Rock and Seinfeld described, as well as another, not unrelated factor: the infantilization of the American undergraduate, and this character's evolving status in the world of higher learning—less a student than a consumer, someone whose whims and affectations (political, sexual, pseudo-intellectual) must be constantly supported and championed. To understand this change, it helps to think of college not as an institution of scholarly pursuit but as the all-inclusive resort that it has in recent years become—and then to think of the undergraduate who drops out or transfers as an early checkout. Keeping hold of that kid for all four years has become a central obsession of the higher-ed-industrial complex. How do you do it? In part, by importing

enough jesters and bards to keep him from wandering away to someplace more entertaining, taking his Pell grant and his 529 plan and his student loans with him." (Flanagan 2015)

Colleges definitely shoot themselves in the foot by: Reducing the value of college to utilitarian advantage to the individual, by ignoring critics in the culture who raise the irony about intolerance and free speech, and who seem intent on coddling students in effort to keep enrollment high.

# **Trump's Proposed Budget**

At this stage, the budget proposed by the current administration (May 23, 2017) is not in its final version, but it is noteworthy in this mid-May stage:

President Trump's budget would eliminate the public-service loan-forgiveness program, subsidized Stafford Loans, and Supplemental Educational Opportunity Grants; begin to phase out the National Endowments for the Arts and for the Humanities; and allow the Perkins Loan program to expire. It would also cut spending in half on Federal Work-Study programs, slash the budget of the National Institutes of Health by a fifth, eliminate programs that foster foreign-language study, and reduce spending that supports international-education programs and exchanges, such as the Fulbright Scholar program, by 55 percent. (Harris 2017)

Indeed, it is highly unlikely all of the proposed cuts will be reflected in the budget eventually passed by Congress. That said, with the exception of the Perkins loan expiration (already assumed to go away), the elimination (or reduction) of all the financial aid programs discussed would significantly impact this campus and others like it. For example, Brenau employs about 100-125 students on Federal Work-Study every year. This money meets critical gaps for both Pell-eligible and plays an even more significant financial role for students from middle-income students who are not eligible for Pell. Incidentally, even the proposed elimination of public-service loan-forgiveness has an administrative impact: currently our HR department has to file paperwork on staff to get this privilege.

"...the Public Service Loan Forgiveness program which forgives loans of borrowers who spend a decade working for government or in the nonprofit sector. Now, there are more than half a million people enrolled in this program. The first generation or the first class of borrowers, if you will, come due in the fall. And there are a lot of folks in this program who are nervous about what's going to happen to it." (Turner 2017)

Brenau and colleges like this one might not experience an impact right away, but there is another federal aid-related item in the proposal that can ultimately impact those who enroll. With regard to all student loans...

Right now there are several different repayment options. The Trump budget wants to consolidate all of those. So undergraduate borrowers under this new plan would have to pay a maximum of 12-and-a-half percent of their income over 15 years. (Turner 2017)

Editor's note: Is Turner only describing policy regarding undergraduate debt here? The impact of this proposal on those borrowing for undergraduate study is uncertain – could even be positive if it simplifies the array of repayment options. However, for those with debt from graduate programs, it appears forgiveness comes only after 30 years (not 15 as stated here). This could mean virtually that graduate school will essentially cost considerably more for those students. (Yu 2017)

In closing, it's fair to say that as representatives of taxpayers, the administration has a stake in all of this and it is only fair they engage in heightened scrutiny. Defensiveness may not be the appropriate response from higher education.

"...politicians from the President to members of Congress, governors and state legislators are piling on, calling for change in the form of greater accountability, cheaper "delivery systems," learning outcomes measures, usually reductionist, and rating systems, always reductionist. Universities are on the defensive, hard-pressed to make their value proposition in the face of so much criticism." (Rawlings 2016)

# **Appendix 1: Threats**

- competition from consolidations of institutions in the public sector
- Communication
- Deferred maintenance deferring need to provide a safe way to exit the rear of the BULLI House
- The age of the buildings on the historic campus
- Lack of Sidewalk at Golden Tiger Way
- Faculty, deans, and department chairs not being educated on how to interview candidates. Questions such as: Are you married? What does your spouse do for a living? Are you Korean? How many children do you have? etc., are embarrassing and opens the institution up for a law suit.
- Uncertainty in ability to enroll sufficient #'s of students
- Maintaining the viability of a Women's College primarily
- Drop in number of enrolled students
- Lack of training in regards to federal/state regulations for payroll/HR
- Drop in Mass Comm department students.
- Age/Deterioration of buildings
- Over-pricing, particularly in the WC and Gainesville Day programs.
- Reputation decline
- Competition from other universities offering lower or free tuition
- Spreading resources too thin trying to create opportunities instead of investing more heavily in existing infrastructure/campuses/programs could ultimately leave BU weak to unforeseen downturns
- Changing demographics especially in traditionally aged female population
- Loss of competitive programming in the marketplace
- Downturn in economy impacting admission
- low enrollment in some majors
- Dangerous intruders

- Poor quality students will cause good ones to leave thus lowering the overall academic standing
- Serious injury to a student in a laboratory class
- Major catastrophic event
- lack of key card access to buildings
- I am not aware of any threat regarding personnel, ethical issues, or public relations.
- open campus
- free tuition movement, competition from public institutions through aggressive growth
- Financial Aid compliance issues
- Loss of large classroom space conversion to labs in Brenau East
- Data (personal information) hacked from mainframe
- Helix they have not met their promised numbers. Using the for-profit model and organization and intentionally keeping it from the students is unethical.
- Uncertainty in ability of enrolled students to pay increasing tuition
- Tuition costs, pricing ourselves out of the market
- Public image of university by being compared to for-profit schools
- The apparent inability of the admissions department to focus their outreach with local area high schools.
- Age of equipment/Deferred Maintenance
- Rising student loan debt and potential increases in default rates that could have an impact on Title IV eligibility.
- campus safety
- Too low pay for faculty, especially adjuncts, compared to other universities
- Online education vs. brick-and-mortar institutions and what that could mean for Brenau's tradition
- Lack of resources
- Poor use of teaching technologies across all programs
- Changes in federal support for loans and grants
- cost of maintaining the buildings
- Dangerous guests
- Too high reliance on adjuncts could jeopardize the brand if they are not adequately trained and monitored

#### **Appendix 1: Threats**

#### SPRING 2017 ENVIRONMENTAL SCANNING REPORT

- Serious injury to a student while participating in athletics
- Financial loss
- lack of sufficient manpower to handle emergencies on campus
- low enrollment
- reduction of public view of value of higher education
- Title IX issues that may end up with financial aid repercussions
- Occasnlly forgetting to incld BULLI in relevant safety emails.
- Loss of total telephone system
- Aging facilties
- Competition
- Trip and Fall Hazards
- enrollment
- Lack of publicity for the good work Brenau does
- Lack of communication and/or confidence between executive ranks and faculty/staff related to certain best practices or decisions
- Mixed signals about liberal education's values
- Tuition rates too high to remain compatative
- Physical plant known and unknown issues
- keeping regional campuses open w/o student enrollment
- Student burnout
- Expansion of low cost online opportunities by big name schools could affect demand for our programs
- Loss of accreditation for all or part of the University, or a specific program
- Significant and/or consistent decline in enrollment
- lack of communication to key personnel as potential risks or threats are known
- fear of robust expectations for student performance levels
- Free college initiatives for public institutions
- A downward turn of the stock market

- Not marketing nationally due to budgets
- Unsafe Locations of Power Lines/Electrical
- Identity as Women's College
- Unclear messaging about the Womens College
- Title IX issue occurring with male students living on campus
- high cost of tuition
- Inability to be competitive in the faculty hiring market leads to lower quality faculty
- Poorly-considered unsustainable growth (eg, AGS)
- upward spiraling costs
- Increased competition for online students from out of state institutions

# **Appendix 2: Opportunities**

- synergies that build strength and reputation in areas like Health Science
- Increasing Regional Campus Program Options
- New classroom potential in Downtown Center
- Growing health sciences
- International programs
- Moving from single-sex college to co-ed
- Expansion of online programs
- Strength of health programs
- Ability to adapt quickly to changing demands of student populations
- We have the knowledge and instructors to be a consistent leader in the education market.
- New Mass Comm Chairman's push for the department faculty and staff to 'market' the department to area prospective students.
- New Construction/Structural Repairs/Elevators
- Expansion of health science programs.
- management diversity
- Successfully conveying the good work Brenau does will increase enrollment
- increase online program and online student population
- Strengthening our brick-and-mortar "niche" to stand against the inevitable move towards online as the primary means of education
- Collegiality among faculty and middle administration
- Ability to be nimble and infuse technology across all courses
- Expansion of day programs for men and women

- find out what employers need and offer degrees and certificates
- Brenau is family to the community
- To be a superior, innovative, online provider
- Enhance our program offerings in health sciences
- Educational leader graduating students with skills to meet needs
- good community relationships with local authorities
- Communication principals
- location close to Metro Atlanta
- emphasis on learning timeless truths
- Online college not dependent on campus locations or capacity
- explore different types of credentials such as badges, mini certificates which can be combined with Brenau courses.
- Much better website
- Growing international programs that recruit students
- Hiring women to run a women's college
- Location
- Mass Comm department is now able to recruit young men.
- Preventative Maintenance/Replacement of Old equipment
- Expansion of online programs.
- liberal arts-infused professional curriculum
- Carrying on the tradition of a single gender school
- increase awareness in the community
- Strengthening online delivery through more qualified faculty/adjuncts and upgraded technology/best practices
- Community support and recognition
- Ability to start competitive programs and end those that aren't
- International student agreements to boost
- use the arts to bring people to the Gainesville campus
- Brenau is filled with smart people willing to do more

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#### **Appendix 2: Opportunities**

#### SPRING 2017 ENVIRONMENTAL SCANNING REPORT

- To grow Mass Comm through the admission of males and the expansion of programs
- Enhance the reputation of our graduates = enhance the reputation of the University
- Location/regional connections
- ample training opportunities
- location in a major healthcare hub
- performance based learning
- High demand and reputation in health sciences
- Expanding athletics to include new sports provides opportunities to get Brenau's name out there
- Increase salaries to the industry standard like the upper level administrators are earning
- Top Leadership to continue to be forward thinking
- This pool of potential students in NE Georgia, with the growth of health care industry in the area should be open to Brenau's offerrings in Health Science education. With the growth of the entertainment industry in the Atlanta-NE Georgia region, the Brenau Mass Comm department and its focus in Social Media and video should be very attractive to potential students from the area.
- Relocation/Stablitiy of Power Lines/Electrical
- International partnerships.
- diversity
- Increasing international connections and opportunities
- share successes such as sports awards and community involvement activities
- Moving forward to true sustainable and "green" practices to align with changes happening in the city - making BU more attractive to newer generations of students

- Flexibility in college education delivery
- Reinvigorating Liberal Arts education
- Health Science continued expansion
- promote the new emphasis on excellence in teaching and learning
- Established academic majors and future offerings
- location near a major media hub
- opening opportunities for the less advantaged
- Large pool of excellent faculty can improve courses if incented

#### SPRING 2017 ENVIRONMENTAL SCANNING REPORT

# **Appendix 3: Weaknesses**

- too diffuse need to focus offerings more
- Lack of Communication
- Not realizing BULLI's potential as a donor base
- Loss of major summer camp income
- Competiveness with UNG: Not selling ourselves better in comparison.
- Single-sex education in the college. What a missed opportunity for revenue.
- Ambiguity of single sex or co-ed
- Small size makes any change in student numbers more significant
- Lack of administrative control over faculty
- We tend to be reactive and unable to anticipate trends in higher education marketing.
- Capital Restraints/Lack of As Built Blueprints
- No thoughts on that at this time.
- lack of resources to expand ahead of the curve
- Lack of publicity for Brenau's story and good work
- Lack of web presence
- Financial insecurity, endowment is insufficient to float the school very long in the case of a revenue freeze and might causes the need to gamble
- Internal Communication
- Gaps in communicating vision and mission all along the hierarchy
- Not focused enough on a plan to grow and evolve
- Legacy program impacting budget without students
- unclear policies

- Not enough eyes paying attention
- Communication
- Failure to involve faculty in large decisions, such as AGS
- Facilities/infrastructure
- lack of IT support as it relates to education and dissemination of important information
- Connection between divisions and meeting a common goal.
- recruitment
- inertia and atrophy
- Poor online course quality
- Division
- Loss of identity in an attempt to diversify
- Retaining current students
- Accepting students less capable of college work and our lack of support in online programs for developmental students.
- The University President
- The need of a Student Center for student gathering
- Detoriation of Paving Areas/Cross walks/Age of Fleet
- location
- Low pay for adjunct faculty
- infrastructure of some on campus facilities
- Lack of communication from top administrative offices all the way down when it comes to certain decisions
- Trying to define itself as Women's College while adapting to changing demographics
- Too many campuses that drain funding
- Physical campus not on par with peer institutions
- unclear reporting structure
- Employee burnout
- Lack of funding for faculty developement [Sic]

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#### **Appendix 3: Weaknesses**

- Inability to offer pay raises to deserving faculty and staff, which makes it difficult to attract and keep outstanding performers
- Recruiting challenges with Women's College
- Secretaries having leadership roles in areas they are not experienced in
- unified messaging/ branding
- disconnectedness
- Lack of faculty engagement in online courses
- Weakening the focus on the arts part of Brenau's heritage, in favor of the sciences
- Less young women in today's society attracted to a one gender institution
- High school curriculum being taught in a university
- ADA Access/Limit Egress
- few faculty superstars
- Too much turnover in admissions staff
- Fragmentation across WC, EWC, AGS, Online and multiple physical locations causes confusion for staff and students, detracts from the feeling that it's all one BU community and causes inconsistency in delivery quality of programs across formats
- Lack of clear support for Arts programs
- Not really utilizing assessment to drive continuous improvement
- Women's College limbo in the future
- overuse of email
- Lack of fudning [Sic] for operations
- Confusion between various offices with respect to published and unpublished policies - confusing to students and faculty alike
- placing resources in the wrong locations

• Perceived high cost contrary to reality of actual cost

# **Appendix 4: Strengths**

- Personalized attention available from faculty and staff
- Personal Attention
- A 139 year old heritage.
- Administrative leaders
- Great faculty
- No tenure structure
- It's reputation for quality education
- History
- Ability to provide personalized educational services
- We have some really outstanding employees who know their stuff.
- Brenau is still small enough to be able to demonstrate to prospective students that they can connect here with people and resources that can insure success in their chosen careers.
- Talent of Staff/Abilitiy to React quickly
- Our broad expanse of educational programs and platforms provides stability, in that when enrollment is on the decline in one area, success in others can balance that out.
- personal attention to students
- Offering quality education with great international connections
- faculty
- Dedicated Faculty and Staff
- Community-Campus Relationships
- Middle management--Deans are good communicators and lifelines to upper admin
- Nimbleness and willingness to change
- Programs in Health Sciences
- dedicated faculty who can inspire students

- Brenau's community bridges
- Caring faculty
- Faculty and staff, and their ability to attract and retain excellent students
- Strong reputation
- small campus geographically
- Working through conflict and reassuring students in a competent and graceful manner.
- student-centeredness
- many of its people
- Rich history and traditions
- if student academic and general support services are strong then promote these as a differentiating factor in comparison to larger institutions
- Tradition
- Multiple opportunities for success
- The draw of a well known college of health sciences
- Major programs
- Varied programs
- Degree offerings in health services fields; high demand areas
- We offer a great education at a great price for most programs
- Knowledge of Systems/History of Buildings
- Competitive salaries and excellent fringe benefits that attract a well-qualified and dedicated faculty, staff, and administration
- open, horizontal management
- Continuing the single gender education
- administration
- The tradition of the Women's College and how that can appeal to certain audiences
- Great Benefits

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- Relationships of faculty and students, especially in traditional format
- Student learning focus
- Flexibility of programs
- a long tradition
- Strong academic leaders
- Array of programs
- Potential for growth in health care education
- Dedicated, qualified staff/faculty
- knowledgeable faculty/ staff
- its reputation
- Excellent locations given population growth trends in southeast
- A dedicated faculty and staff
- The loyalty/commitment of Brenau employees
- Support Services (Academic and Student Life)
- Top leadership
- Relationships/Partnership with Local Vendors
- Reputation in the region.
- diversity of students
- The strength and friendliness of the Brenau Community
- location around the state
- Academic programs that are strong in comparison to others in the state especially theater and nursing/health sciences
- It's history and legacy
- Has developed positive regional reputation
- willingness of faculty and staff to try new ideas
- Farily good online
- Strategic planning and vision of university's leadership
- diversity
- its location in state and the southeast

• Technology focused on cloud access and reliaibility

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