

OFFICE OF ADMINISTRATION AND FINANCE

BRENAU UNIVERSITY



2022 Environmental Scan

Environmental Scanning is a process of identifying trends in the surrounding environment. These changes can be societal, technological, environmental, economic or political. This environmental scan is created with the intent of stimulating discussion for strategic planning by examining external and internal factors affecting potential opportunities and possible threats to long- and short-term plans.



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EXECUTIVE SUMMARY

An environmental scan follows the STEEP process focusing on Societal, Technological, Economical, Environmental, Political topics and other current trends relevant to Higher Education.

- **Society** – US Population growth in 2021 was the lowest recorded in history, in part due to COVID-19. The number of US graduates in the nation and Georgia is expected to peak in 2024-25 and then experience a sharp decline, with an 8.1% national and 13.3% state decrease by 2031-32. Only about half of high school sophomores and juniors are interested in pursuing a fully on ground bachelor's degree. A more diverse Generation Z now outnumbers Millennials on college campuses and is more likely to have at least 1 parent who is college educated than previous generations.
- **Technology** – Online and hybrid leaning and work options made necessary by the COVID-19 pandemic are here to stay, and colleges will need to make more than surface adjustments to properly support their students and workforce. The education industry is the most targeted for cyber-attacks, requiring colleges to be proactive in their cyber security efforts and smart about the distribution of limited available funds. Microcredentials certifying mastery of technical and “soft skills” are becoming a more appealing option than bachelor degrees for employers and are a potential new revenue stream for institutions facing declining enrollment.
- **Economic** – The US is facing a wide-spread labor shortage and Georgia is one of the hardest hit states. Inflation and market losses are making college less affordable for many while more opportunities with slightly better pay become available to those without a college degree. A college degree is still seen as valuable, but there is more concern about whether that value outweighs the cost.
- **Environment**– Overall, students are more concerned and interested in working towards environmental sustainability, but need commitment and guidance from their institutions for effective action. The state of physical campus structures can have a noticeable impact on a student's college experience and a fully supportive and holistic learning environment is even more important for students coming out of the isolation of the pandemic.
- **Politics** – The cost of college and student loan forgiveness are front and center in current political debates while politicians seek more control over what and how things are taught at all levels of education. Reductions in the volume of courses required to earn degrees and a focus on technical skills is a focused action being taken. Pell grant amounts have increased but still only cover about 32% of the cost of attending a 4-year public college.



BRENAU 2022 SNAPSHOT

Brenau University is a small private liberal arts university with a Women's College history and core, located in Gainesville, Georgia. Brenau has a total population of 2,704 students enrolled in undergraduate and graduate programs for the Fall 2022 semester and had a total unduplicated student count of 3,399 students for the 2021-2022 academic year.



Brenau offers Associate, Bachelor, Master, Specialist and Doctorate Degrees as well as Certificate programs in 4 academic colleges; Business and Communication, Education, Fine Arts and Humanities, and the Ivester College of Health Sciences. Brenau is accredited by the Southern Association of Colleges and Schools Commission on Colleges.

90% of Brenau's student population comes from Georgia, with 5% from other states in the Southeast, 4% from states outside of the southeast and 1% international students.

87% of Brenau's students are women and 13% are men.

55% of Brenau's undergraduate population and 49% of Brenau's graduate population identifies as non-white. Black/African American students make up 25% of the undergraduate and 32% of the graduate population and Hispanic/Latino students make up 14% of the undergraduate and 7% of the graduate student population.

25% of all Brenau students were eligible for Pell grants in Fall of 2022, with 48.6% of the undergraduate and .15% of the graduate students falling into that category.

39% of Brenau's students identify as First-generation students. 41% of undergraduate and 32% of graduate students have indicated that neither of their parents has a college degree.

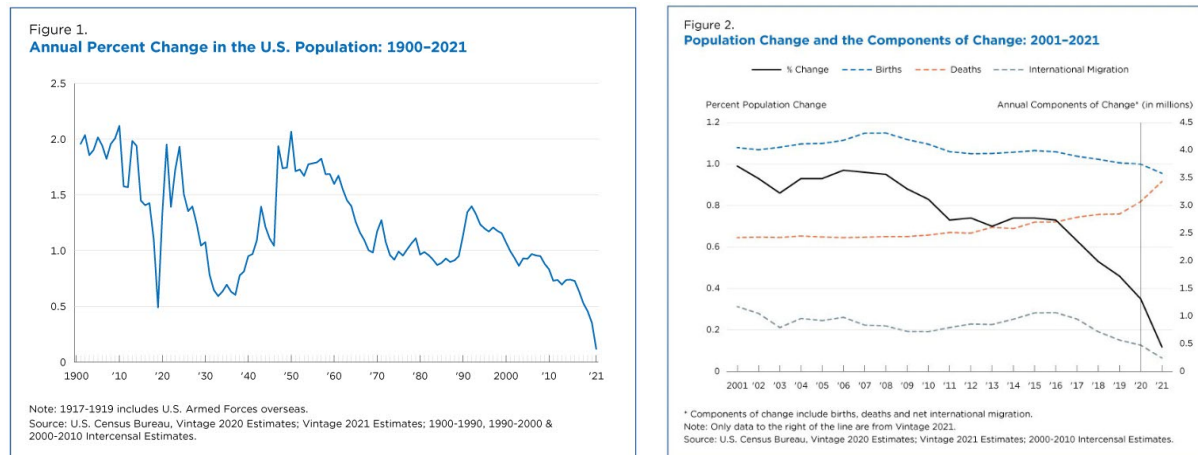
At the end of Fiscal Year 2022, Brenau's total assets and liabilities totaled \$144.4 million with an endowment worth \$47.8 million.

Brenau's posted full time undergraduate tuition rate is \$15,500/semester, or \$31,000/year. For the 21-22 academic year Brenau awarded \$9.3 million in scholarships (16.4% of the total tuition and fees for the year), primarily to undergraduate students. \$5.1 million in scholarships was awarded for the Fall 2022 semester, equaling 16.6% of the total tuition and fees for the semester. The average Women's college student receives scholarships equal to between 56% and 67% of their tuition and fees.

Graduate tuition is determined by program and ranges from \$682/credit hour for a Master in Education to \$15,990/semester for a Master of Occupational Therapy.

SOCIETY (DEMOGRAPHICS)

According to data from the US Census Bureau and the Pew Charitable Trusts, the population of the United States grew at a slower percentage rate in 2021 “than in any other year since the founding of the nation.” According to the U.S. Census Bureau Vintage 2021 Population Estimates, the US populations “grew only 0.1% and [...] the COVID-19 pandemic exacerbated the slower growth the country has experienced in recent years” (Rogers, 2021). The US population grew by less than 1 million people in 2021, for the first time since 1937. As of November 9, 2022, the CDC reported that there have been at total of 1,070,947 deaths reported related to COVID-19 in the United States. In Georgia a total of 40,803 COVID-19 related deaths have been reported. (Centers for Disease Control and Prevention, 2022).



Another cause for the low population growth, exacerbated by COVID-19, is the drop in international migration. Net international migration added 247,000 people to the nation’s population from July 1, 2020 to June 30, 2021, compared to 477,000 from July 1, 2019 to June 30, 2020. “Most COVID restrictions [on immigration] remained in place over the 2021 estimates year,” which greatly reduced the movement of people into and out of the country. (Schachter, Borsella, & Anthony, 2021). In spite of this reduction in international migration, nationwide “gains from international migration exceeded gains from the natural increase in 2021. It was the first time that newcomers from other countries contributed more to population growth than gains from births in a given year.” (Biernacka-Lievstro & Fall, 2022)

According to the US Census Bureau’s Quick Facts site, as of July 1, 2021, Georgia had an estimated population of 10,799,566, which represents a .8% increase from the 2020 census data. Of that population 23.4% were under the age of 18. The split in identified racial demographics was 59.4% White, 33% Black or African American, 10.2% Hispanic or Latino, 4.6% Asian, 2.4% Two or more races, .5% American Indian and .1% Native Hawaiian or other pacific islander. Foreign born persons made up 10.2% of the population between 2016 and 2020 and 14.0% of Georgians spoke a language other than English at home. Median household income was \$61,224 between 2016 and 2020 and 14% of the population fell below the poverty line. (United States Census Bureau, 2022)

TRENDS IN COLLEGE READY POPULATION

Traditional aged college students from 18 to 22 and those preparing to graduate high school have been identified as firmly belonging to Generation Z, those born between 1996 and 2010 (Chang, 2022). This

newest identified generation of students, the oldest of which are now 26 years old, is overtaking the number of Millennials on college campuses. (Gilbert, 2022) Generation Z students in the United States are more ethnically diverse, with only about 52% of the generation identifying as white non-Hispanic, 25% Hispanic, 14% black, 6% Asian and 5% identifying as another or two or more races. (Parker & Igielnik, 2020). This generation of students is also more likely than previous generations to have a parent who is college educated. "In 2019, 44% of Gen Zers ages 7 to 17 were living with a parent who had a bachelor's degree or more education, compared with 33% of Millennials when they were the same age." (Parker & Igielnik, 2020)

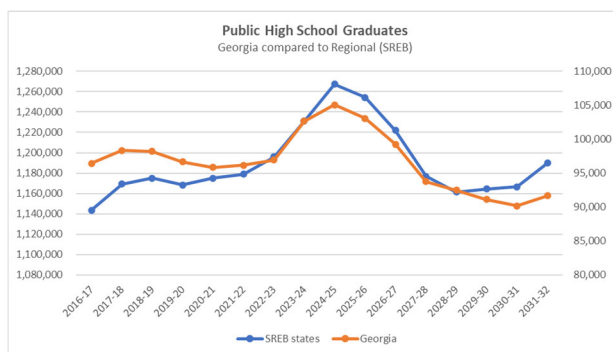
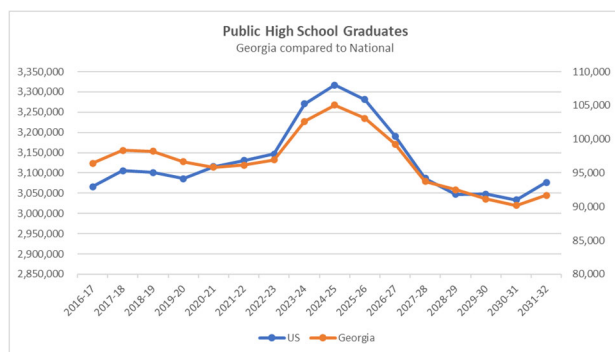
Most of the older members of Generation Z started high school and college looking at a strong economy and record low unemployment, but now face a more uncertain future. According to a PEW survey in March of 2020, "half of the oldest Gen Zers (ages 18 to 23) reported that they or someone in their household had lost a job or taken a cut in pay because of the [COVID-19] outbreak." (Parker & Igielnik, 2020)

The traditional aged student population currently starting college and planning to enroll over the next few years will have had a high school experience that was greatly disrupted and changed by the COVID-19 pandemic. The group of students starting as freshman this year were Juniors and Seniors during the 2020-2021 academic school year when most schools were shutting down and implementing social distancing and remote teaching protocols in response to the COVID-19 outbreak. This disruption has led to students feeling underprepared to continue their education past high school and many have needed to reassess their college plans in light of changes to their situation caused by the pandemic.

A survey conducted by Hannover Research of over 1,000 high school sophomores and juniors in July of 2022 noted that 49% of prospective students are interested in seeking a bachelor's degree with a fully on-campus college experience compared to 60% in 2021 and 66% in 2020, with 36% interested in hybrid course work and 19% wanting fully online coursework. 58% of students expressed an interest in attending an institution within 4 hours from their home town. Affordability (39%), getting a good job (34%) and tuition assistance (30%) were the top 3 factors for students in deciding on which institutions to apply to, with flexible course scheduling (30%) and location (26%) rounding out the top 5 factors. The top 5 objectives listed for continuing their education were: earn a high salary (77%), enhance resume job credentials (71%), personal fulfillment (71%), explore academic interests (68%) and becoming a role model for family (57%). (Hannover Research, 2022)

POPULATION TRENDS

According to the 2021 SREB Factbook projections, the number of high school graduates each year is expected to peak during the 2024-2025 academic year, with an estimated 3,317,313 graduates nationwide. This represents a 5.6% increase from the last class that graduated in 2021-22. The states comprising the Southern Regional Education Board (SREB) are expected to see a 7% increase in graduates between the 2021-22 graduating class and 2024-25 for a total of 1,267,439 graduates that year, and Georgia is expected to see an 8.5% increase from 96,180 graduates in 2021-22 to 105,071 in 2024-25.



Public High School Graduates																
	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32
US	3,066,390	3,106,030	3,100,980	3,085,700	3,115,190	3,130,440	3,146,620	3,270,509	3,317,313	3,280,993	3,190,662	3,086,407	3,047,075	3,047,544	3,033,544	3,076,509
SREB states	1,143,450	1,169,200	1,175,080	1,168,510	1,175,190	1,178,920	1,195,900	1,231,053	1,267,439	1,254,475	1,221,869	1,176,847	1,161,347	1,164,306	1,166,550	1,189,786
Georgia	96,430	98,350	98,220	96,670	95,860	96,180	96,930	102,642	105,071	103,085	99,255	93,759	92,507	91,133	90,173	91,686

(Campbell Lounsbury, Datubo-Brown, & Bartlebaugh, 2022) Table 9 <https://www.sreb.org/fact-book-tables>

Following the expected peak graduation rate in 2024-25, the number of graduates each year is expected to drop below 2021-22 numbers across the board by 2027-28, with the number of graduating students falling by 8.1 % nationally and regionally by 2031-32 and by 13.3% in Georgia. However, it is important to note that the data of the 2021 SREB Factbook was collected just before or at the very beginning of the pandemic, so we will need to wait for the next annual updates to illustrate the changes that have been caused by the pandemic. (Campbell Lounsbury, Datubo-Brown, & Bartlebaugh, 2022)

First-Year application data from the Common Application showed that 195,102 applications were submitted by 42,495 unique applicants from Georgia for the 2021-2022 school year. Of these applications 41% (roughly 79,992) were submitted to one of the 21 participating colleges in Georgia (including Brenau, UNG and UGA) and 59% were submitted to out of state institutions. From 2020-2021 there was a 7% increase in applicants using the Common App in Georgia and a 19% increase in applications submitted. This compares to a 8% total increase in all Common App applicants and a 15% in total applications submitted using the Common App. (The Common Application, 2022)

Some of the demographics for Georgia first-year applicants using the Common App to apply for the 2021-2022 school year are:

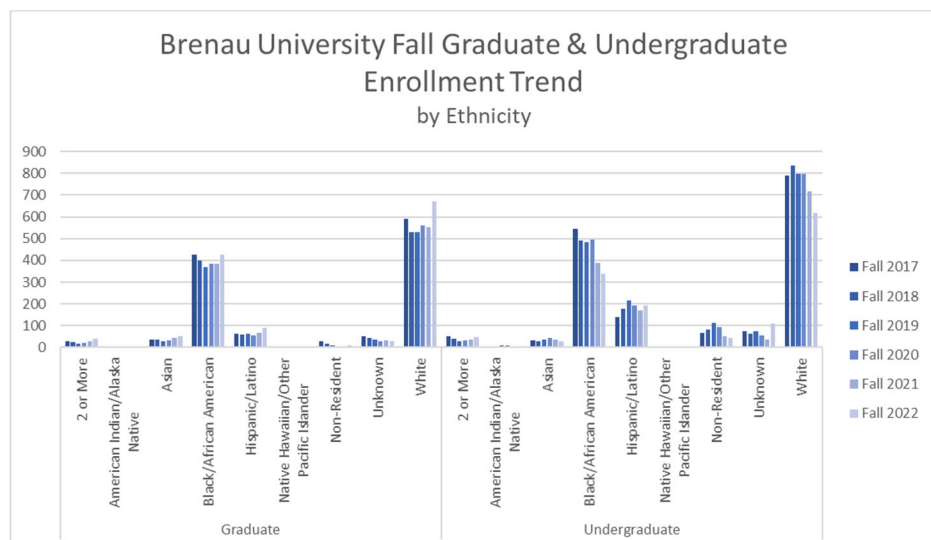
- Race/Ethnicity
 - White 39%
 - Black or African American 31%
 - Latino 11%
 - Asian 10%
 - Two or more races 5%
 - Non-resident Alien 1%
 - Unknown 2%
- Sex
 - 42% Male and 58% Female
- First Generation Status
 - 36% First Generation / 64% Not first-generation

Based on IPEDS data reporting from Title IV institutions for the 2020-2021 academic year there were 21,361,807 undergraduate students enrolled nationally, with 13,437,422 students (62.9%) enrolled in 4 year colleges and 7,465,580 students (34.9%) enrolled in 2 year institutions. Of the undergraduate students enrolled in 4-year institutions, 57.6% were women and 42.4% were men. 49.4% of enrolled students were White, 18.3% were Hispanic, 12.1% were Black or African American and 6.7% were Asian. 12.7% of undergraduate students were identified as two or more races, nonresidents or race/ethnicity unknown. (National Center for Education Statistics, 2022)

Public High School Graduates by Race/Ethnicity															
Identified Race	2010-2011			2015-2016			2020-2021			2021-2022			2022-2023		
	US	SREB	GA	US	SREB	GA	US	SREB	GA	US	SREB	GA	US	SREB	GA
White non-Hispanic	59.6%	53.2%	50.4%	56.5%	50.6%	49.2%	54.1%	48.3%	46.6%	53.8%	48.0%	46.4%	53.0%	47.3%	45.5%
Hispanic	18.6%	24.0%	37.6%	22.0%	22.7%	36.0%	25.1%	21.6%	35.3%	25.7%	21.3%	35.2%	26.6%	21.5%	35.6%
Black non-Hispanic	15.3%	18.4%	7.9%	14.6%	22.3%	10.5%	13.9%	26.1%	13.7%	13.7%	26.8%	14.2%	13.8%	27.5%	14.8%
Asian/Pacific Islander	5.5%	3.2%	3.9%	5.8%	3.7%	4.5%	6.5%	4.4%	5.5%	6.6%	4.6%	5.6%	6.5%	4.6%	5.7%
American Indian/Alaska Native	1.1%	1.1%	0.3%	1.0%	1.0%	0.3%	0.8%	0.8%	0.3%	0.8%	0.8%	0.3%	0.8%	0.8%	0.3%
Identified Race	2023-2024			2024-2025			2025-2026			2026-2027			2027-2028		
	US	SREB	GA	US	SREB	GA	US	SREB	GA	US	SREB	GA	US	SREB	GA
White non-Hispanic	52.3%	46.6%	44.5%	52.0%	46.1%	43.3%	51.5%	45.7%	41.4%	51.7%	45.7%	41.7%	52.2%	46.2%	42.6%
Hispanic	27.3%	21.7%	36.5%	27.7%	22.0%	37.6%	27.5%	22.1%	37.9%	27.1%	22.1%	37.6%	26.5%	22.1%	38.3%
Black non-Hispanic	14.0%	28.2%	15.3%	14.2%	28.8%	15.5%	14.4%	28.8%	17.1%	14.4%	28.7%	16.8%	14.4%	27.8%	15.2%
Asian/Pacific Islander	6.4%	4.6%	5.6%	6.3%	4.6%	5.7%	6.7%	4.8%	6.0%	6.9%	5.1%	6.2%	7.0%	5.2%	6.4%
American Indian/Alaska Native	0.8%	0.7%	0.3%	0.8%	0.7%	0.3%	0.8%	0.8%	0.2%	0.8%	0.8%	0.3%	0.8%	0.8%	0.3%

(Campbell Lounsbury, Datubo-Brown, & Bartlebaugh, 2022) Table 9 <https://www.sreb.org/fact-book-tables>

Amongst Brenau's undergraduate population there has been a sharp decline in the number of students identifying as white, dropping from almost 800 students in both the Fall of 2019 and 2020 to a little over 600 students in the Fall of 2022. There was also a large decline in students identifying as Black/African American, from about 500 in the Fall of 2019 to a little less than 350 in the Fall of 2022. The number of Asian students has also declined slightly, but the number of students identifying as Hispanic/Latino has increased this past year to almost 200, roughly the same number as in Fall of 2020, and just slightly less than the number of students in Fall of 2019. The number of students whose ethnicity is unknown, or who identify as more than 1 race have both grown for the Fall of 2022.

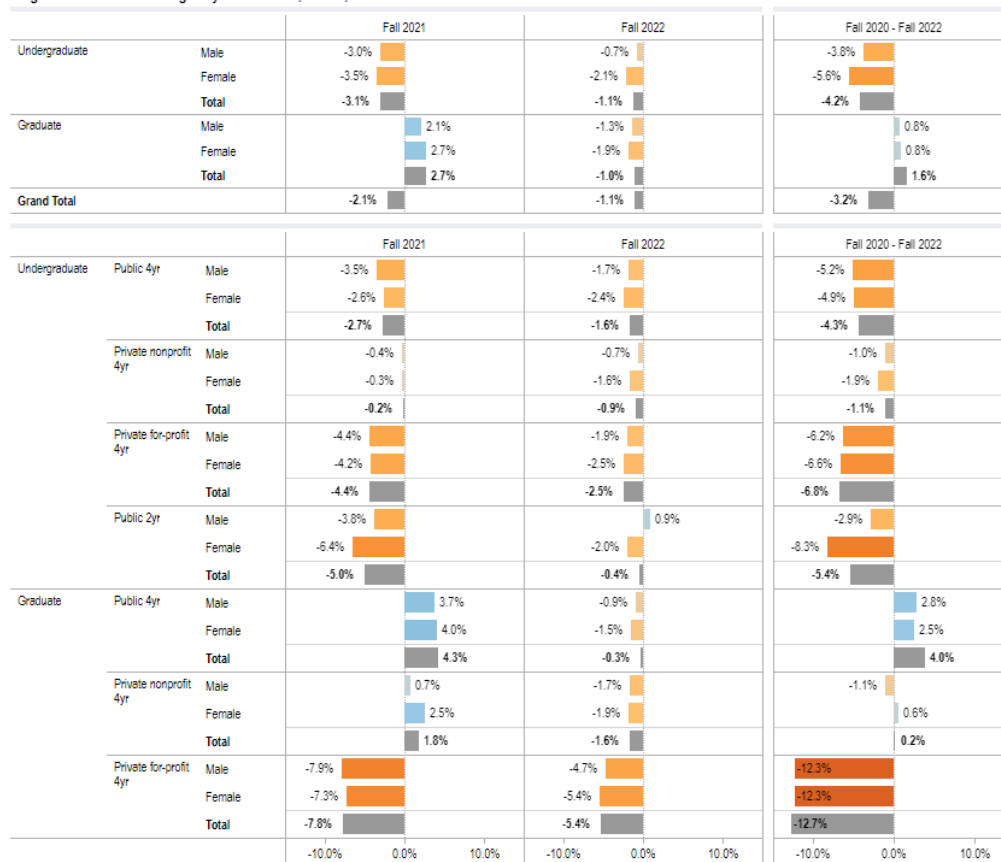


The number of students in Brenau's graduate programs has increased for all ethnicities for the Fall of 2022, with those identifying as white seeing the steepest increase, from slightly less than 550 the Fall of 2021 to slightly more than 650 in Fall 2022. Students identifying as Black/African American and Hispanic/Latino have seen graduate enrollment increases the past 2 years, accompanying a decrease in undergraduate enrollment amongst Black/African American students. There have been moderate increases in students identifying as Asian and in students identifying as more than one race.

GENDER ENROLLMENT TRENDS

In the fall of 2020, there were 11,122.253 (58.6%) Females enrolled in postsecondary institutions compared to 7,869.545 (41.4%) Males. (National Center for Education Statistics, 2022) This continued a growing trend of declining male enrollment in post-secondary institutions, with the percentage of male enrollment steadily decreasing from 43.7% in the fall of 2015. This trend has shifted slightly in the past 2 years. According to the October 20, 2022 edition of the National Student Clearing House Research Center's *Stay Informed* enrollment update, "In the two years since fall 2020, freshmen grew among men by a total of 1.8 percent while declined among women by 2.6 percent." "Across all sectors, female freshmen declined at more than twice the rate of males (-3.2% vs. -1.3% respectively). [...] This gender difference is amplified at community colleges, where male freshman enrollment has grown 5.5 percent [...] since fall 2020, while women declined by 4.4 percent. (National Student Clearinghouse Research Center, 2022)

Figure 1. Enrollment Changes by Award Level, Sector, and Gender



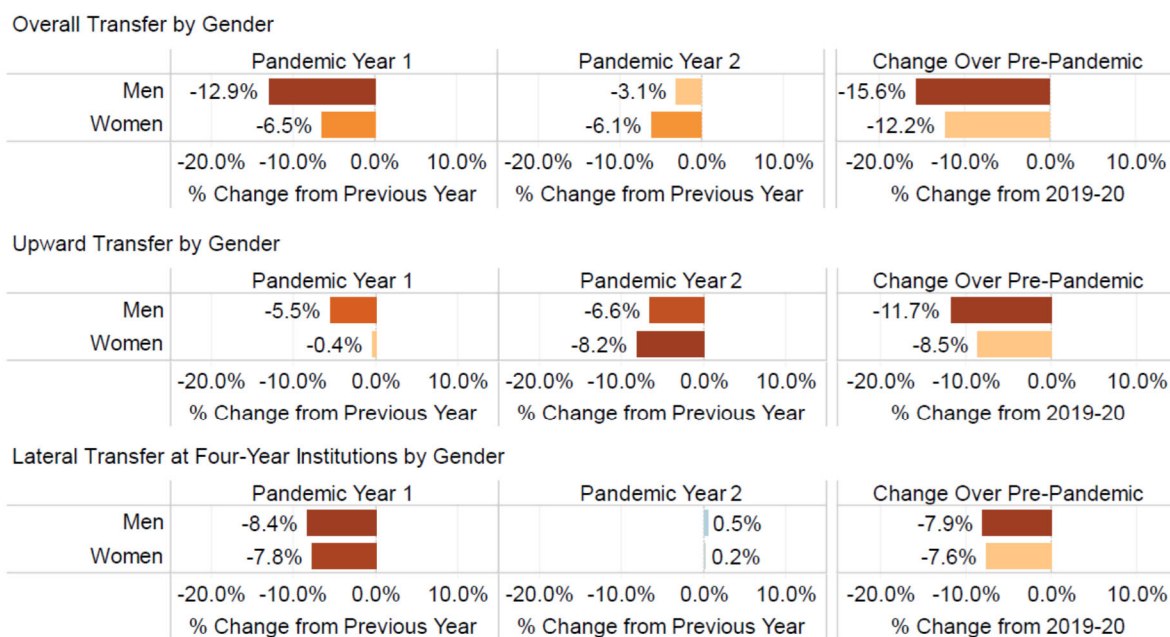
(National Student Clearinghouse Research Center, 2022)

TRANSFER-IN ENROLLMENT TRENDS

A study on how transfers, mobility and progress at higher education institutions have been affected by the first two years for the COVID-19 pandemic was published by the National Student Clearinghouse Research Center in September 2022. The report looks at the 2019-20, 2020-21 and 2021-22 academic years to compare the early and continuing effects of the COVID-19 pandemic. It notes that the pandemic has “magnified existing disparities among demographic groups.” (Causey, et al., 2022). During the first two years of the pandemic higher education suffered a total loss of almost 300,000 transfer students (200,000 in 2020-21 and 97,200 in 2021-22) impacting all transfer pathways.

In terms of gender, the effect of the pandemic on transfers shifted from the first year of the pandemic (2020-21), when transfer enrollment declined more for men (-12.9%) than women (-6.5%). However, in the second year of the pandemic (2021-2022) women experienced roughly the same level of transfer enrollment decline (-6.1%), while the decline in male transfer enrollment in year 2 only declined -3.1%. The overall decline in transfer enrollment from pre-pandemic levels was greater for men (15.6%) than women (12.2%) however, the recovery in the second year of the pandemic has been better for men than women. “If these trends continue, it is possible that lingering effects of the pandemic may begin to jeopardize some of women’s advancement in higher education of the past decades.” (Causey, et al., 2022)

Figure 6. Overall and upward transfer fell more for men than women in year 1, which was reversed in year 2.

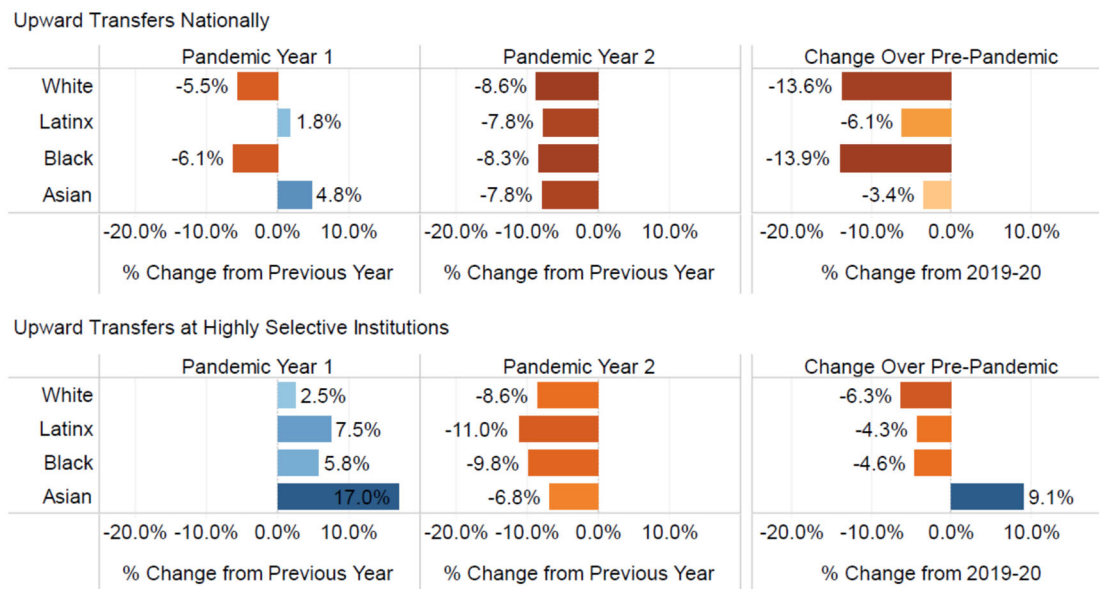


(Causey, et al., 2022)

Enrollment and persistence rates of transfer students varied across racial and ethnic groups. Transfer decreases were sharpest for White (16.4%), Black (16.4%) and Native American (5.4%) students, and were more pronounced in the first year of the pandemic (2020-2021) than in the second year (2021-22). Transfers of Latino and Asian students actually increased in the first year of the pandemic, but the

transfer rates of these student populations decreased almost as much (7.8%) as the other groups of students in 2021-22. (Causey, et al., 2022)

Figure 7. Highly selective institutions lost ground in year 2 in all racial and ethnic groups.

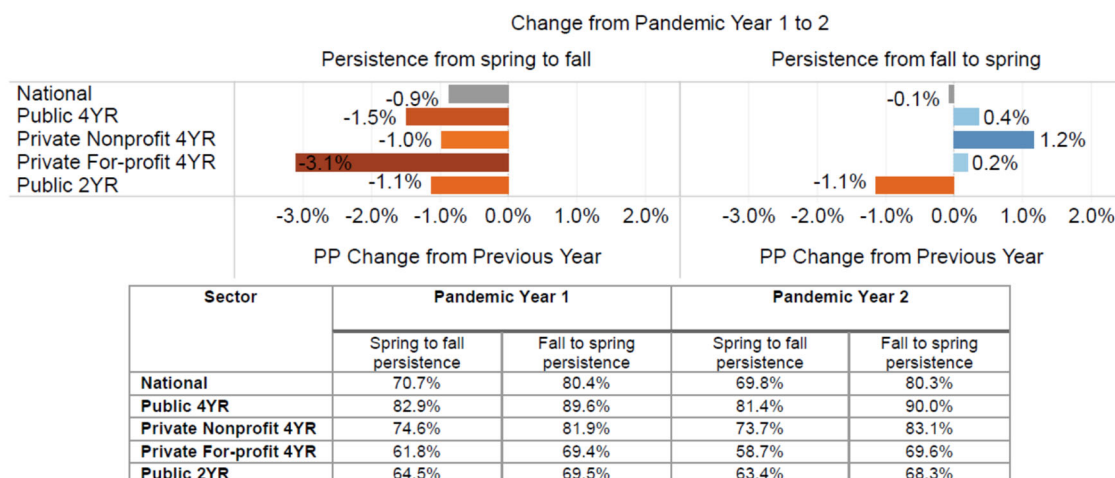


Note: Changes in upward transfer for Native American students not shown due to small N. See appendix for additional detail on Native American transfer students.

(Causey, et al., 2022)

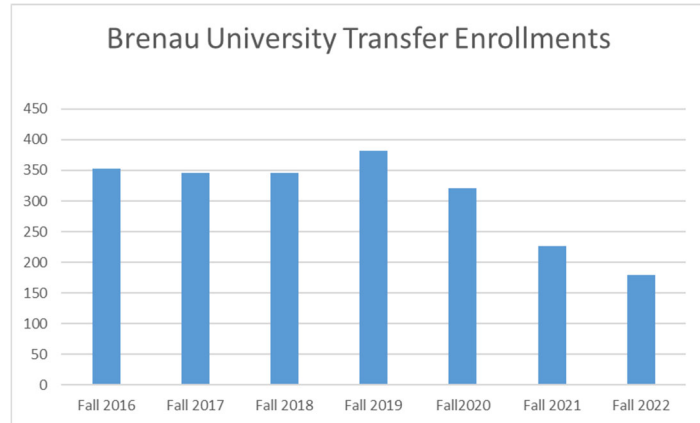
Overall post-transfer persistence rates, for the term after transferring, during the pandemic decreased nationally from 80.7% for fall transfers and 70.7% for spring transfers pre-pandemic to 80.3% and 69.8% in the second year of the pandemic respectively. The only group that saw a return to pre-pandemic persistence levels were students aged 20 or younger. The persistence rates for Latino and Native American transfer students over the 2 years of the pandemic suffered a decline almost twice as large as the decline for other racial ethnic groups. (Causey, et al., 2022)

Figure 5. Persistence rates rebounded in year 2 for every institutional sector except community colleges.



(Causey, et al., 2022)

Brenau has seen a steady decline in new students transferring in to the university since the start of the pandemic. Pre-pandemic transfer enrollments since 2016 were around 350 students per year. Fall 2020 saw this number drop to close to 300 students, with the decline continuing to around 225 in Fall of 2021 and about 175 in Fall of 2022. This represents a drop of around 200 students (53%), transferring into Brenau each year between 2019 and 2022.



To offset this drop in transfer enrollments, and to create new pathways for student enrollments, Brenau has signed agreements with Lanier Technical College, Gwinnett Technical College and Athens Technical College to provide pathways for students to transfer into Brenau programs. It is yet to be determined if the agreements will yield increases.

ECONOMIC

“The economic recession triggered by COVID-19 caused a historically rapid and deep decline in economic activity and employment. [...] Policymakers responded by rapidly implementing historically large fiscal and monetary stimulus beginning in spring 2020 and continuing into 2021. This stimulus, and the gradual reopening of the economy, led to a historically rapid economic recovery. However, the recovery was incomplete and uneven – the demand for goods and services recovered more quickly than supply did, and the demand for labor rebounded faster than labor supply did. [...] A market imbalance where demand is higher than supply can be resolved only by prices rising. As a result, inflation has risen in 2022 to a level last seen in the early 1980s.” (Labonte & Weinstock, 2022)

LABOR MARKET

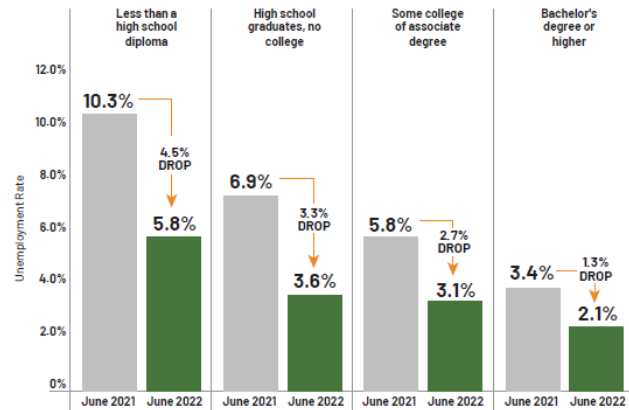
During the height of the COVID-19 Pandemic, the unemployment rate reached a peak of 14.7% in April 2020. “In 2021, more than 47 million workers quit their jobs, many of whom were in search of an improved work-life balance and flexibility, increased compensation, and a strong company culture.” (Ferguson, Understanding America's Labor Shortage: The Most impacted Industries, 2022). This labor force disruption was originally referred to as the Great Resignation, but analysis of labor trends during and following this period have led many to reclassify this period as the Great Reshuffle instead, as hiring has outpaced quit rates since November of 2020. (Ferguson, Understanding America's Labor Shortage: The Most impacted Industries, 2022)

In June of 2022 the unemployment rate finally returned to pre-pandemic rates at 3.6% (EducationDynamics, 2022) and as of November 2022 the national unemployment rate was at 3.7% (Bureau of Labor Statistics, 2022). While unemployment rates are back to pre-pandemic levels, employers are still facing a large labor shortage. As of October 2022, labor force participation was down to 62.3% from 63.3% in February 2020. (Ferguson, Understanding America's Labor Shortage: The Most impacted Industries, 2022) Reasons for the decline in available workers include early retirements, a slowdown in immigration, ongoing child care and eldercare challenges and covid-related illnesses and deaths.

As of December 2022, there were approximately 10.1 million Jobs and only 5.8 million unemployed workers. Meaning that even if every unemployed worker found a job, there would still be over 4 million open positions. The national ratio of available workers to jobs is 73 workers to every 100 open jobs (.73), but this ratio varies from state to state, and Georgia is seeing one of the most severe shortages with a labor force participation rate for 61.9% and only 49 unemployed workers for every 100 open jobs (.49). (Ferguson & Lucy, America Works Data Center: A national crisis by the numbers, 2022) As of October 2022, Georgia's unemployment rate was at 2.9% with a labor force participation rate of 61.8% (down from 3.7% and 62.7% pre-pandemic numbers in March 2020). (U.S. Bureau of Labor Statistics, 2022)

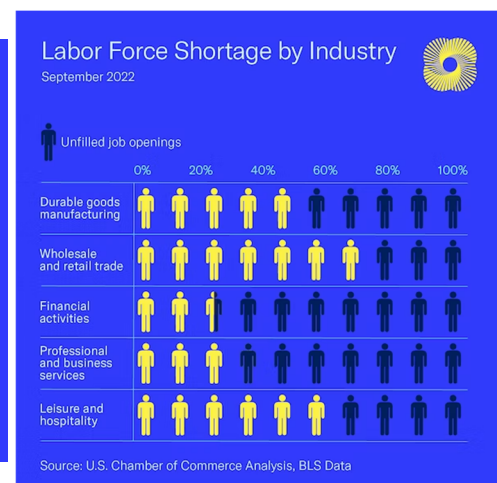
While unemployment rates have dropped across all education levels, the biggest drop was among those with less than a high school diploma (4.5% drop from 10.3% in June 2021 to 5.8% in June 2022) and high

school graduates with no college (3.3% drop from 6.9% in June 2021 to 3.6% in June 2022). (EducationDynamics, 2022) This indicates that job prospects for those without any college experience have improved, which contributes to the ongoing discussion regarding the value of a college education. However, it is important to note that, while the unemployment levels for these groups have improved for 2022, they are still higher than the 2021 unemployment levels for those with a bachelor's degree or higher, which have also improved for 2022.



(EducationDynamics, 2022)

As of December 5, 2022 there have been 1,077,303 reported COVID-19 related deaths in the United States, out of 98,777,220 reported cases. (Centers for Disease Control and Prevention, 2022). 226,701 (24.5%) of those reported deaths were among people 18 to 64 years of age, the prime workforce demographic, (Centers for Disease Control and Prevention, 2022). In addition to loss due to deaths, it is estimated that COVID-19 illnesses have reduced the U.S. labor force by about half a million people. (Goda & Soltas, 2022). This means that unemployment and labor market participation rates estimates are being factored on a potential labor pool that includes 750,000 fewer people. Even more than that, if pre-pandemic trends had continued, it is estimated that there would have been 2.9 million more workers in the active labor force.



(Ferguson, *Understanding America's Labor Shortage: The Most impacted Industries*, 2022)

CAREER OPPORTUNITIES

The current labor force shortage has exacerbated previously existing worker shortages in key industries such as healthcare, hospitality and education. Prior to the pandemic the nation was already seeing critical shortages in healthcare professions, particularly nursing, and in education. Short staffing and the greater demands placed on those working in these professions due to the pandemic have contributed to higher rates of burnout, leading to early retirements and fueling strikes across the country as workers demand better conditions and pay. While this had prompted concern that the pandemic would discourage students from pursuing nursing degrees, the American Association of Colleges of Nursing

reported in April of 2022 that student enrollment in entry-level baccalaureate nursing programs increased by 3.3% in 2021. (American Association of Colleges of Nursing, 2022).

Whereas Nursing, often seen as a well-paying recession-proof career, has seen an increase in student enrollment, a recent study by the Pew Research Center found that the number of students graduating with a bachelor's in education has declined nationwide in the last few decades, from about 105,000, or roughly 8% of all undergraduate degrees, for the 2000-2001 academic year to about 85,057, or 4% of all undergraduate degrees, for the 2019-2020 academic year. (Scheffer, 2022) So, while jobs are widely available for both nurses and teachers, recruiting students into the field of education, and into education programs, will be a much more challenging task than filling open nursing positions and programs.

Aside from nursing and education, according to employment projection data from the U.S. Bureau of Labor Statistics (updated as of August 2022) the following occupational groups will see the creation of over 500,000 new jobs between 2021 and 2031 nationwide. (U.S. Bureau of Labor Statistics, 2022)

- Food preparation and serving related occupations: 1,319,900
- Healthcare support occupations: 1,253,800
- Management occupations: 883,900
- Transportation and material moving occupations: 861,800
- Healthcare practitioners and technical occupations: 795,300
- Computer and mathematical occupations: 764,800
- Business and financial operations occupations: 715,100
- Educational instruction and library occupations: 658,200
- Personal care and service occupations: 544,800

According the Georgia Department of Labor, the following industries will see over 20,000 new jobs between 2020 and 2023.

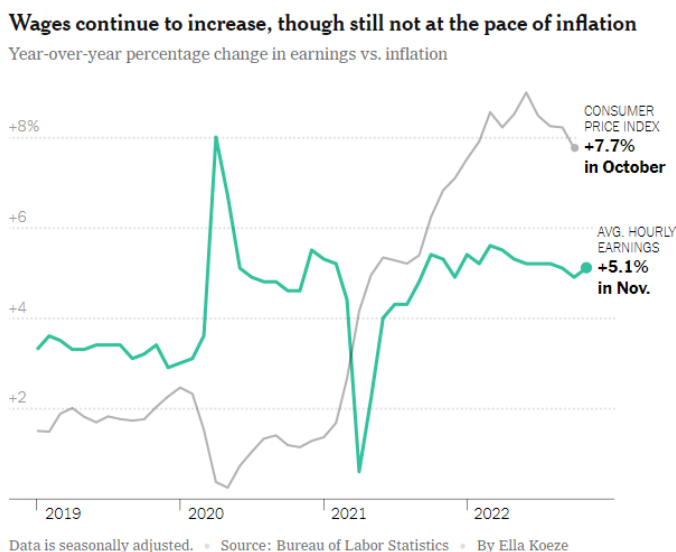
- Restaurants and Other Eating Places: 94,120
- Warehousing and Storage: 26,990
- General Medical and Surgical Hospitals: 26,660
- Offices of Physicians: 26,210
- Elementary and Secondary Schools: 25,460
- Employment Services: 23,120

Other industries in Georgia that are projected to see high job growth, between 10,000 and 14,000 new jobs between 2020 and 2030, are Offices of non-Physician Health Practitioners, Individual and Family Services, Local Government, Traveler Accommodation, Clothing Stores, Credit Intermediation, and Continuing Care Retirement communities.

While only projected to add about 9,000 new jobs between 2020 and 2030, it is worthwhile to note that Georgia led the nation in jobs gained in motion picture and video industries from 2011 to 2021, with an increase of 15,611 jobs. (U.S. Bureau of Labor Statistics, 2022)

INFLATION/RECESSION

The lingering effects of the COVID-19 pandemic, along with the war in Ukraine, are largely responsible for the current inflation the U.S. and the rest of the global economy is currently experiencing. The Consumer Price Index Report for October 2022 stated that the cost of the all items CPI-U index increased 7.7% over the previous 12 months. (Bureau of Labor Statistics, 2022). Shutdowns and supply chain issues across the globe created supply shortages while government stimulus and low interest rates increased demand. Labor shortages caused by the COVID-related factors noted above and an excess of unfilled positions also caused wages to rise, but not at the same rate as inflation, and many businesses “have taken advantage of rising wages and increased consumer savings from government stimulus to raise their prices.” (Associated Press, 2022)



(DePillis, 2022)

COVID-19 pandemic, with tuition freezes or tuition increases between 1.3% and 2.1%, some colleges are now increasing tuition by up to 5% to cover the higher costs caused by inflation. (Dickler, 2022) The Federal Reserve’s attempts to slow or halt inflation, mainly by increasing interest rates, will also affect the affordability of college for students, by making students loans more expensive. The interest rate for federal student loans for the 2022-2023 school year was 4.99%, increasing from 3.73% for 2021-2022 and 2.75% for the 2020-2021 school year. (Dickler, 2022).

Stock market losses caused by Inflation and recession concerns are also having a big impact on both families’ ability to pay for college and the funds available to institutions from their endowments. While the markets and endowments saw large and steady increases in 2021, with U.S. college endowments posting their best annual performance since 1986 in August of 2021 (Lorin, 2021), the market started to decline at the beginning of 2022, causing both college funds and endowments to suffer large investment losses. As of June 30, 2022 there were roughly 15.9 million 529 college savings accounts representing a total investment amount of \$412.5 billion, down from \$480.4 billion in 2021. The average 529 college investment account value dropped from \$30,652 in December 2021 to \$25,903 as of June 30, 2022. (College Savings Plans Network, 2022) Brenau’s own endowment went from \$62.1 million at the end of

Russia’s Invasion of Ukraine caused both food and oil prices, two of the consumer products with the most volatile pricing, to rise globally. Ukraine is a major global exporter of grain and, when Russia’s invasion shut off the supply of grain out of Ukraine, it caused food prices to rise globally. Western sanctions against Russia in response to the invasion cut most of Europe off from its primary source of oil and gas, causing worldwide energy prices to increase as well. (Lopez, 2022)

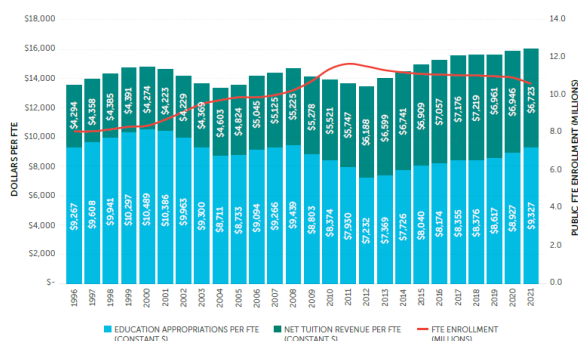
While tuition rates held fairly steady during the height of the

December 2021 to \$47 million at the end of September 2022, increasing concerns about budgeted endowment drawdowns and budget contingency plans. Institutions that rely heavily on their endowment for operating expenses will find themselves in an even tighter financial position.

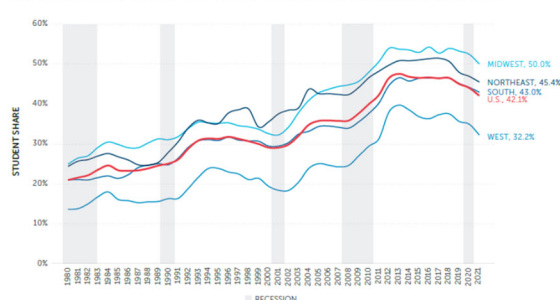
(PERCIEVED) COST AND VALUE OF COLLEGE DEGREES

“Between 1991-92 and 2021-22, the average tuition and fees increased from \$2,310 to \$3,800 at public two-year, from \$4,160 to \$10,740 at public four-year, and from \$19,360 to \$38,070 at private nonprofit four-year institutions, after adjusting for inflation.” (Ma & Pender, 2021)

PUBLIC FTE ENROLLMENT, EDUCATION APPROPRIATIONS PER FTE, AND NET TUITION REVENUE PER FTE, U.S., FY 1996-2021 (CONSTANT DOLLARS)



NET TUITION AS A PERCENT OF TOTAL EDUCATION REVENUE, U.S., FY 1980-2021

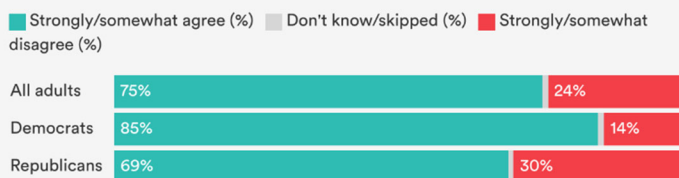


State Higher Education Executive Officers Association. (2022). *State Higher Education Finance: FY 2021*.

According to a survey conducted by New America in the Spring of 2022, 75% of adults agree that “education beyond high school offers a good return on investment for the general population” and 76% agree that it offers a good return on investment for the student. (Fishman, Nguyen, & Woodhouse, 2022) Most Americans continue to agree that a college degree is important in helping young people to succeed, however rising tuition costs, and the sheer volume of student loan debt, has a greater portion of the population questioning whether the benefits of college outweigh the costs.

Figure 5. How much do you agree or disagree that education beyond high school offers a good return on investment for the general population?

(n=1,517)



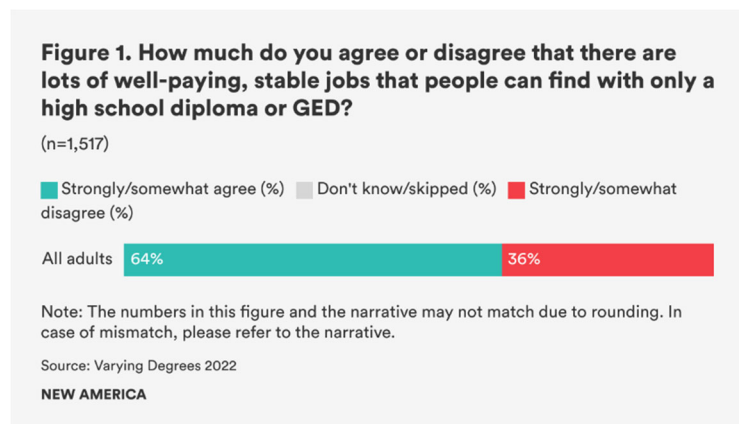
Note: The numbers in this figure and the narrative may not match due to rounding. In case of mismatch, please refer to the narrative.

Source: Varying Degrees 2022

NEW AMERICA

(Fishman, Nguyen, & Woodhouse, 2022)

“Only half of Americans (49 percent) think the economic benefits of a college education outweigh the costs. Young people without degrees are particularly skeptical.” (Schleifer, Friedman, & McNally, 2022) While numerous studies have shown that people with post-secondary degrees make more over their lifetimes than those who don’t attend any college, the current low unemployment rates and



corresponding wage increases caused by the labor shortage makes the idea of going straight into the workforce out of high school, and not incurring large student load debts, more appealing. 64% of all adults surveyed in the New America survey agreed that “there are lots of well-paying, stable jobs that people can find with only a high school diploma or GED.” (Fishman, Nguyen, & Woodhouse, 2022)

(Fishman, Nguyen, & Woodhouse, 2022)

published an article reporting that employers, both in government and the private sector, have started removing the requirement that applicants hold a bachelor’s degree from job postings. These postings still require applicants to have skills and certifications, requiring some form of education beyond high school, but would no longer automatically disqualify an applicant that has not completed a bachelor’s program. (Lanahan, 2022) According to a report by the Federal Reserve Bank of Philadelphia published in January 2022, the share of online job postings paying decent wages and accessible to noncollege workers rose to 26 percent, an increase of more than 700,000 jobs in the second quarter of 2021. (Wardrip, 2022)

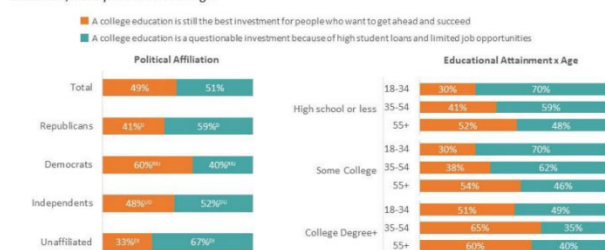
In July 2022 *The Hechinger Report*

The decline in public confidence in the value of education has gotten to the point that the National Association of System Heads (NASH), representing the leaders of 65 university systems across the country, unveiled a new “College is Worth It” campaign at their December 2022 conference. The campaign seeks to combat declining public opinion by developing a new data set for reporting and “setting concrete goals for institutions to increase credential attainment, improve social mobility, and reduce student debt.” (Knox, 2022) The campaign is billed not only as a public relations effort, but also a material effort on the part of the systems to increase the economic return on investment in a college degree. As part of the campaign, NASH wants its member systems to increase credential production over the next 8 years in ways that will also help close the equity gap. (Knox, 2022)

In an interview conducted by *Inside Higher Ed* with Sophie Nguyen, Senior Policy Analyst with New America (and one of the authors of the Varying Degrees Report), David Schleifer, vice president and director of research at Public Agenda, a national

Half of Americans believe that a college education is a questionable investment. Younger people without degrees and the politically unaffiliated are especially skeptical.

Figure 5. Percent of Americans who say which of the following statements come closest to their view, by political affiliation, and by education and age:



Base: All respondents, N=1,662; Republican, N=378; Democrat, N=694; Independent, N=388; Politically Unaffiliated, N=202; Total High school or less, N=388; Total Some college*, N=382; Total College Degree+*, N=892; 18-34 High school or less, N=128; 18-34 Some college, N=126; 18-34 College degree+, N=205; 34-54 High school or less, N=124; 34-54 Some college, N=124; 34-54 College degree+, N=321; 55+ High school or less, N=136; 55+ Some college, N=141; 55+ College degree+, N=366

*Some college does not include Associate's Degree. College Degree+ includes Associate's Degree

Numbers may not add up to 100 percent due to rounding.

Estimates indicated with a * are statistically significant from the Republican estimate. Estimates indicated with a † are statistically significant from the Democrat estimate. Estimates indicated with a ‡ are statistically significant from the Independent estimate. Estimates indicated with a § are statistically significant from the politically unaffiliated estimate.

Public Agenda/USA Today Hidden Common Ground Survey – Higher Education

(Schleifer, Friedman, & McNally, 2022)

research organization (and one of the authors on the Public Agenda Higher Education survey report) and Natasha Quadlin, co-author of *Who Should Pay? Higher Education, Responsibility, and the Public*, Schleifer summed up the findings of the recent surveys as follows:

“[T]he takeaway is that the **prices are too high** — [sic] there’s no simpler way to say it. And people know that completion is not a guarantee, and even if they do complete, they’re left with debt. I do not think the takeaway should be some kind of hand-wringing about ideology. It has to be a conversation about costs and completion, because that’s what people are seeing as problems. [...] It’s clear what people’s priorities are, which is affordability, access and also career-relevant skills. [...] In the conversation about affordability, I would say not to lose sight of completion or student success. We have this long list of things there’s cross-partisan support for—flexible credentials and stackable credentials and all partnerships so people graduate from high school with some college credits, working more closely with employers.” (Nguyen, Schleifer, & Quadlin, 2022)

A survey conducted in October of 2020 by the Association of American Colleges and Universities and Hanover Research asked almost 500 executives and hiring managers about their expectations for college level learning and the preparedness of students graduating with liberal arts degrees. The results of this survey showed that while “employers believe the outcomes of a liberal education are important for success in the workforce” most do not believe that recent graduates are well prepared in those skills identified as outcomes of a liberal arts degree. Also, while personal qualities and capacities matter, completing active and applied learning experiences, especially internships, gives job applicants a clear advantage in the hiring process. (Finley, 2021)



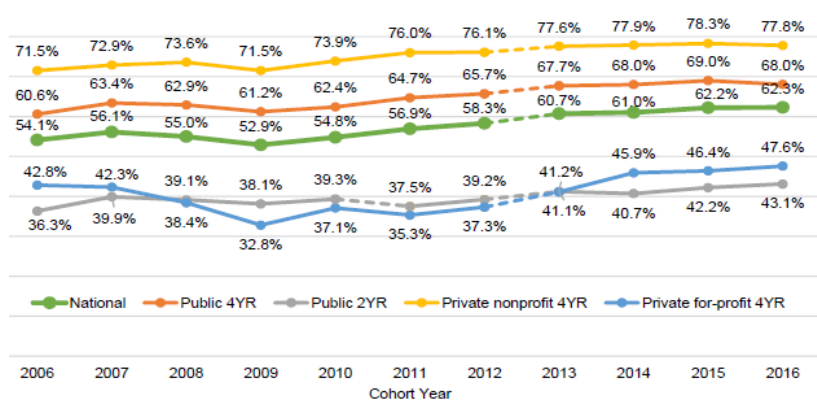
(Finley, 2021)

HIGHER EDUCATION – POSTSECONDARY EDUCATION OUTCOMES

A report on college completion statistics published in November of 2022 by the National Student Clearinghouse Research Center found that “progress in the national completion rate has stalled,” with the June of 2022 6-year completion rate for the Fall 2016 cohort at 62.3%, up only .1% from 62.2 the previous year and 61.0% the year before. (Causey, Lee, Ryu, Scheetz, & Shapiro, Nov. 2022)

The completion rate for women is 7.1% higher than the rate for men and completion rates continue to improve for older students while remaining steady for traditional aged students. The completion rate improved for Asian and Native American students but fell by about .5% for White, Black and Latino students. (Causey, Lee, Ryu, Scheetz, & Shapiro, Nov. 2022)

Six-Year Completion Rates by Starting Institution Type: 2006 – 2016 Entering Cohorts



(Causey, Lee, Ryu, Scheetz, & Shapiro, Nov. 2022)

At the state level, only 5 states saw completion rates that increased at least 1% from 2021 to 2022. Georgia saw a .1% decline in the average completion rate from the previous year across all institution types and a .6% increase at Public 4-year institutions, a .9% drop at Private 4-year non-profit institutions and a .6% drop at Public 2-year institutions, although private 4-year non-profit institutions still have the highest completion rates, at 73.0% in Georgia and 77.8% nation-wide. (Causey, Lee, Ryu, Scheetz, & Shapiro, Nov. 2022)

However, degree completion “is not an end in itself; it is the promise of progress and prosperity beyond completion that motivates students to enroll in education programs and inspires our citizens to invest public funding in them.” (Hanson, 2022) One of the components underlying the ongoing debate on the value of higher education is the fact that most young workers don’t find a “good job”, making \$35,000 or more a year, until they are in their early 30s, and “to secure a good job, young adults need more education and high-quality work experience than was necessary for previous generations (Carnevale, et al., 2022).” A report by Georgetown University’s Center on Education and the Workforce (CEW) on *The Uncertain Pathway from Youth to a Good Job* highlighted 3 hurdles young adults need to overcome; the rising cost of postsecondary education, limited access to high-quality work-based learning, and the absence of comprehensive counseling and career navigation services. (Carnevale, et al., 2022).

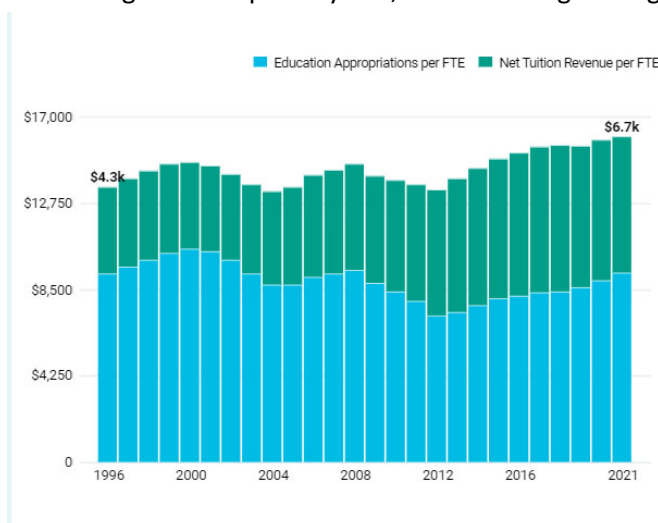
Using updated data from the federal government’s College Scorecard, a new report released in February 2022, also by the Georgetown University CEW, examining the return on investment for college degrees found that an average of “60% of college students across institutions earn more than a high school graduate after 10 years.” (Georgetown University Center on Education and the Workforce, 2022). The report also noted that at 1,233 postsecondary institutions, or 30% of all colleges, more than half of students made less than high school graduates after 10 years. Colleges that predominantly offer certificates or associates degrees were found to have the highest return on investment 10 years after enrollment while private colleges primarily offering bachelor’s degrees were found to provide the highest return on investment 40 years after enrollment.

POLITICS

NATIONAL

PUBLIC FUNDING

A report released in June 2022 by the State Higher Education Executive Officers Association found that overall state funding for higher education increased by 4.5% in Fiscal Year 2021. While state appropriations for higher education have been increasing over the past 9 years, this is the largest single year increase since 2014 (Nietzel, 2022) and state funding is still not back to the pre-recession levels of 2001 and 2008. (State Higher Education Finance, 2022) According to the report, “Net tuition and fee revenue per FTE has grown 56.6% over the last 25 years but has declined for the last three years following recent increases in state funding.” (State Higher Education Finance, 2022) Net tuition revenue as a percentage of total revenues at public colleges had doubled from 20.9% in 1980 to 42.1% in 2021. (Whitford, 2022) Federal Covid relief funds helped to buoy higher education funding in 2020 and 2021 and increased



(State Higher Education Finance, 2022)

state budgets. States committed a portion of the surplus generated to higher education institutions to help jumpstart the workforce. According to an analysis by the Education Commission of the States, education funding and affordability, along with workforce development, were recurring themes in 2021 State of the State addresses by governors, irrespective of party affiliation. (Whitford, 2022)

STUDENT LOAN FORGIVENESS

In August of 2022, President Joe Biden announced plans to forgive up to \$10,000 of outstanding federal student loan debt for individuals whose annual income is less than \$125,000, and up to \$20,000 for those individuals who were Pell Grant recipients. (The White House, 2022) The Congressional Budget Office estimates that this student loan forgiveness plan would cancel about \$430 billion in federal student loan debt (Swagel, 2022).

This followed a pause on federal student loan repayments and the accumulation of interest on those loans, that was implemented in March of 2020 at the beginning of the COVID-19 pandemic. This pause has been extended at least 7 times with the latest extension in November of 2022 providing relief into 2023 as the proposed federal loan forgiveness plan faces challenges in the court system. These legal challenges include a suit filed in the 8th Circuit from a coalition of 8 Republican-led states that claim the loan forgiveness program would deprive the states of revenue via state-affiliated FFELP lenders and another suit by a conservative nonprofit organization claiming that the administration did not follow proper procedures under the Administrative Procedures Act. (Minsky, 2022)

FEDERAL PELL GRANT

In March of 2022, Congress increased the maximum Pell Grant award 6.2% from \$6,495 to \$6,895. This represented the largest year to year increase in a decade. (Arrojas, 2022) Pell Grants, federal financial aid grants given to low- and middle-income students, are determined based on a calculation of a family's expected contributions based upon the Free Application for Federal Student Aid (FAFSA). Pell awards used to cover 80% of the cost of attending a four-year public college, but increases to the grant awards have not kept up with the rising cost of tuition and now only cover about 32%. (Luhby, 2022)

50% of Brenau's undergraduate students are eligible for Pell grants.

LOCAL

GEORGIA HIGER EDUCATION

On March 1, 2022, The Georgia Board of Regents appointed Sonny Perdue the Chancellor of Education for the university System of Georgia. The appointment was seen as political maneuvering by Governor Kemp, citing Perdue's lack of professional experience in higher education and the fact that Kemp, as governor, appoints the members of the Board of Regents who then select the chancellor. This appointment was criticized by faculty and student groups that were concerned about political interference in academia, especially after changes the previous year had been made to the state's tenure rules allowing administrators to fire tenured professors without faculty input. (Garbus, 2022)

In March of 2022 the American Association of University Professors voted to censure the entire University System of Georgia for "effectively abolishing tenure in Georgia's public colleges and universities in flagrant violation of long established principles on academic freedom." (American Association of University Professors, 2022). The association noted that by making the changes the Board of Regents of the University System of Georgia was removing protections for academic freedom, which will impact the quality of education and the ability of Georgia institutions to recruit and retain quality faculty and students.

In April of 2022, the Georgia House of Representatives passed House Bill 1084, titled the Protect Students First Act, which was signed into law by Governor Kemp on April 28, 2022. This law prevents "the use of and reliance upon curricula or training programs which act upon, promote, or encourage certain concepts, with exceptions; to provide for related matters; to repeal conflicting laws; and for other purposes." (Wade, 2022) While proponents claim that this addresses a widespread problem in classrooms, opponents claim that this bill will hinder the teaching of history. (Tagami, 2022) This bill also creates an athletics committee with the authority to ban transgender youth from playing on sports teams aligning with their gender identity." (Luneau, 2022). While this law only applies to K-12 schools, and not higher education institutions, the bill is part of a larger conservative movement in response to Critical Race Theory taught on college campuses.

Georgia Senate Bill HB 1, signed into law on May 3, 2022 does affect public institutions of higher education. This bill, titled the Forming Open and Robust University Minds (FORUM) Act prevents the creation of "free speech zones" on campuses. (Thompson, 2022). The bill states that "students, faculty members, and guests should be able to express free speech wherever they want on campus." (Kallis, 2022). Critics of the bill fear that this will provide a platform for hate speech on campus and would "give

individuals who do not pay tuition, who are not affiliated with the college, unrestricted access” (Kallis, 2022).

Another law, not directly related to higher education, but affecting institutions, is Georgia’s 6-week abortion ban signed into law in 2019 that went into effect when *Roe vs. Wade* was overturned by the Supreme Court this year. The ban was struck down by a GA superior court judge on November 15, 2022, and then the decision was overturned by the Georgia Supreme Court a week later on November 23, 2022. (American Civil Liberties Union, 2022). The uncertainty of the legality and status of the ban puts higher ed institutions in the difficult position of balancing State and Federal law, as the Education Department’s Title IX provides protections for abortion and pregnancy. Guidance for higher education institutions from the Department of Education released in October 2022 confirmed the legal protections against discrimination due to pregnancy, or the termination of pregnancy, under Title IX. The release also reminded universities that they “must treat pregnancy, childbirth and abortion ‘the same as any temporary disability’ under the health insurance plans they offer to students and faculty.” (Panetta & Haines, 2022).

INTERNATIONAL

The global economy is currently facing a confluence of 3 major international challenges; global inflation, the impact of Russia’s invasion of Ukraine and the continued impact of the COVID-19 pandemic. According to the International Monetary Fund’s October 2022 World Economic Outlook: Countering the Cost-of-Living Crisis, “global growth is forecast to slow from 6.0 percent in 2021 to 3.2 percent on 2022 and 2.7 percent in 2023.” With the exception of the global financial crisis and the worst period of the Covid-19 pandemic, “this is the weakest growth profile since 2021 [...] and reflects significant slowdowns for the largest economies.” (International Monetary Fund, 2022)

INTERNATIONAL POLITICAL CONDITIONS

Russia’s invasion of Ukraine is causing “sever economic repercussions in Europe, with higher energy prices, weaker consumer confidence, and slower momentum in manufacturing resulting from persistent supply chain disruptions and rising input costs.” (International Monetary Fund, 2022) The war has also had a large impact of global food prices. Ukraine’s status as one of the world’s biggest agricultural exporters resulted in wheat prices jumping by 46% and corn by 11% in the days that followed the invasion. (MacDonald, 2022). Along with rising food prices, it is estimated that Ukraine provides about 40% of the wheat for the World Food Programme, and the disruption in production and distribution caused by the war “could have profound impacts on global food supplies, with far-reaching consequences for hunger and food security across the world,” (Ritchie, 2022) especially in countries that depend on the organization’s support.

Continuing pandemic-related issues are also still having a wide-ranging global impact. As of September 2022, “more than 64% of the global population has been fully vaccinated [...] (but) only 26% of countries have COVID-19 vaccination rates above the global target of 70%, the majority of which are high income.” (The White House, 2022) “Due in part to COVID-19, there are now worker shortages in key job sectors, such as truck driving and other skilled labor categories, including the health care sector. Further, women and girls have borne a disproportionate burden of the pandemic’s socioeconomic effects, with higher rates of employment loss, school dropouts, and increases in reported gender violence.” (The White House, 2022)

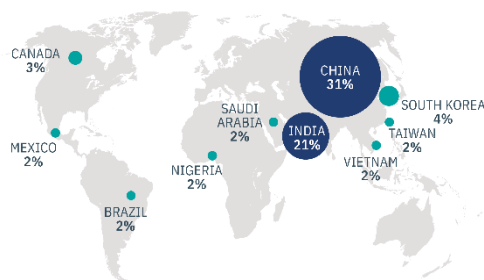
Economically, COVID-19 related restrictions and lockdowns in China have led to slowing domestic economic activity, as well as a reduction in manufacturing capacity utilization to less than 76%, with fewer exports adding to continuing supply chain issues and global inflation. (International Monetary Fund, 2022). Spurred by slowing economic growth and rising unemployment due to lockdowns, residents in China's biggest cities gathered over the weekend of November 26-27, 2022 in rare widespread protests of China's Zero-Covid Policy and to call for freedom and democracy. (He, 2022)

INTERNATIONAL STUDENT TRENDS

Overall International student enrollments for the 2021-22 academic school year were up about 4% from the previous year to about 950,000 students, but still remained below pre-pandemic highs. This included an 80% increase in first-time foreign students, and "for the first time in a decade, there were more international graduate students in the United States than international undergraduates." (Fischer, Latitudes: International students return to U.S. campuses but not at even rates, 2022) For the 2021/22 school year there were 385,097 international graduate students, up 17% from 2021, and 344,532 undergraduate international students, down 4.2 % from 2020/2021 (which itself was down 14.2% from 2019/20). (Open Doors, 2022)

Between May and August of 2022 the U.S. State Department issued almost 282,000 F-1 student visas worldwide. This equals about a 2% increase over the same period in 2021 and 10% more than before the

LEADING PLACES OF ORIGIN OF INTERNATIONAL STUDENTS, 2021/22



Students from China and India accounted for **52%** of international students.

(Open Doors, 2022)

growing population of international applicants, with more than 84,000 F-1 visas issued by the state department between May and August of 2022, which represents a 45% increase from the same period in 2021 and 148% more than all of 2019.

(Fischer & Bauman, Number of New Chinese Students at U.S. Colleges Plummeted This Fall, Visa Data Show, 2022). Students from China and India combined made up 51.6% of all international students studying in the US for the 21-22 academic school year. Students from South Korea are the next largest population, with 40,755 students making up 4.3% of the total international student population studying in the US. (Open Doors, 2022)

COVID-19 pandemic. While Chinese students still make up the largest segment of international students studying in the US (about 252,000 in September 2022), the number of Chinese students applying for student visas has dropped significantly from 86,824 between May and August of 2021 to 47,429 during the same period in 2022. (Fischer & Bauman, Number of New Chinese Students at U.S. Colleges Plummeted This Fall, Visa Data Show, 2022)

Students from India now represent the largest growing population of international applicants, with more than 84,000 F-1 visas issued by the state department between May and August of 2022, which represents a 45% increase from the same period in 2021 and 148% more than all of 2019.

PLACES OF ORIGIN OF INTERNATIONAL STUDENTS

	2020/21	2021/22	% of total	% change
WORLD TOTAL	914,095	948,519	100.0	3.8
China	317,299	290,086	30.6	-8.6
India	167,582	199,182	21.0	18.9
South Korea	39,491	40,755	4.3	3.2
Canada	25,143	27,013	2.8	7.4
Vietnam	21,631	20,713	2.2	-4.2
Taiwan	19,673	20,487	2.2	4.1
Saudi Arabia	21,933	18,206	1.9	-17.0

(Open Doors, 2022)

85% of students from India interested in studying abroad are planning to pursue a Graduate degree, vs. 15% planning to pursue an undergraduate degree and Data Science, Engineering, Commerce/Business Management, Finance and IT are their top preferred fields of study (Kumar, Surendran, Mody, &

Makrani, 2022). The top selected fields of study amongst all international students studying in the US for 2021-2022 were Math and Computer Science (21.1%), Engineering (19.8%), Business and Management (15.5%), Social Sciences (8.3%) and Physical and Life Sciences (8.3%). Fine and Applied Arts came in as the 6th most popular field with 5.4% of the total international student population. (Open Doors, 2022)

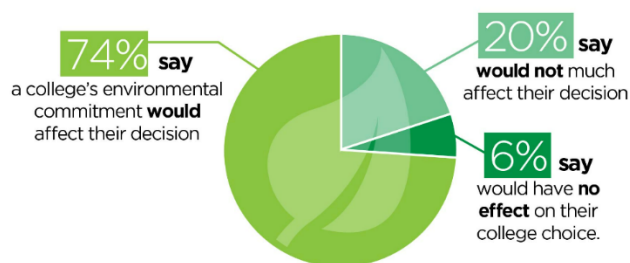
ENVIRONMENT

When discussing environment in terms of Higher Education, we can look at very 3 different but interconnected items. The first refers to sustainability and an institution's commitment to environmental issues, which ties into the second item, the structures and processes that make up a campus' physical environment, which in turn plays a big part in forming the overall learning environment for students.

STUDENT CONCERNS OVER ENVIRONMENTAL ISSUES

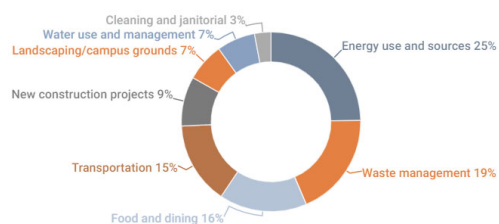
According to the Princeton Review's 2022 College Hopes & Worries report, 74% of the survey's 14,148 respondents reported that having information about a college's commitment to the environment would contribute to their decision to apply to or attend the school. (The Princeton Review, 2022) However, according to a Student Voice survey conducted by *Inside Higher Ed* in December of 2022 "only Forty-five percent considered environmental sustainability in their college enrollment decision, [and] only 12 percent say it also influenced their choice of college." (Ezarik, Actions and Hopes of the Sustainability-Focused Student, 2023)

School commitment to the environment affecting school choice



(The Princeton Review, 2022)

Single most important area students say their institution must focus on making more sustainable



Source: Inside Higher Ed/College Pulse survey of 2,164 college students; explore the data [here](#)

(Ezarik, Actions and Hopes of the Sustainability-Focused Student, 2023)

The Student Voice survey looked at student commitment levels, pursuit of sustainability topics in coursework, student advocacy action, visibility of sustainability efforts, green dining practices, student personal actions and habits, and institutional leadership in sustainability efforts. Overall, the results pointed toward a student body interested in working towards environmental sustainability, but without much knowledge of how to effectively work towards that goal and needing commitment and guidance from their institutions.

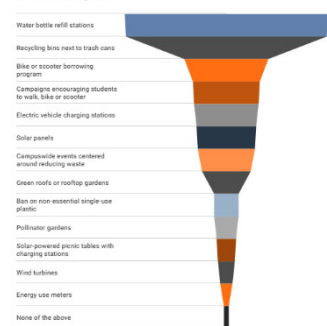
Julian Dautremont, the director of programs for the Association for the Advancement of Sustainability in Higher Education, noted that about one in four colleges has fairly strong sustainability commitments and almost all are doing something, although those programs may be more ad hoc without a designated person being paid to improve sustainability at the institution. (Ezarik, Actions and Hopes of the Sustainability-Focused Student, 2023) Throughout the pandemic, students, faculty and staff engaged with campuses differently and, while pandemic issues caused focus to shift to personnel and strategies for reducing potential COVID exposure on campuses, global higher education leaders are now reflecting on the changes caused by the pandemic to reevaluate campus usage and infrastructure and outline initiatives to support the environment. (Valerkou, 2022) Institutions in North America are committing to sustainability efforts by participating in the Association for the Advancement of Sustainability in Higher Education's STARS (Sustainability Tracking, Assessment & Rating System) a transparent, self-reporting framework for colleges and universities to measure their sustainability performance, and by creating leadership roles at their institutions to promote sustainability initiatives. (Valerkou, 2022)

PHYSICAL CAMPUS STRUCTURES

Many of the most impactful sustainability initiatives revolve around updates to campus buildings and infrastructure, which is not as feasible for small private colleges as it is for institutions with larger budgets. Gordian's 2022 State of Facilities in Higher Education report estimates that despite "annual investments of \$36.8 billion in operations/maintenance/utilities, and a further \$27 billion in capital investment of new and renovated space, higher education as a whole faces an estimated \$112 billion in urgent deferred renewal" and 30% of buildings are in the 10-25 year renovation age group (the age of buildings since their last major refresh). (Gordian, 2022) With enrollment declines and the corresponding reduction in tuition revenue, institutions need to make careful choices in how to best use and distribute available funds from smaller operating budgets.

Student Awareness of Sustainability Efforts

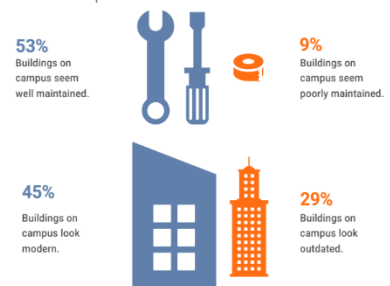
What visible indications of a commitment to sustainability students see or are aware of on their campus



(Ezarik, Actions and Hopes of the Sustainability-Focused Student, 2023)

Students Assess Campus Building Quality

Statements students say are generally true at their campus

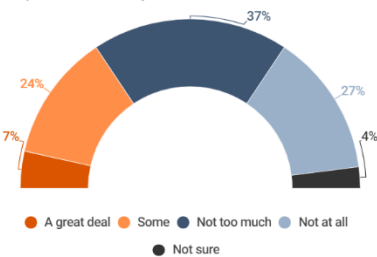


Source: Inside Higher Ed/College Pulse survey of 2,000 college students; explore the data [here](#)

(Gordian, 2022)

Facilities Problems May Hinder Learning

How much students say that poor maintenance, cleaning or overall building conditions on campus have impacted their ability to focus and learn

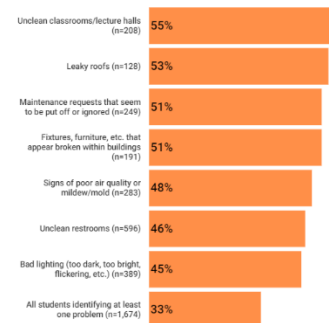


(Ezarik, *Actions and Hopes of the Sustainability-Focused Student*, 2023)

“Impressions of campus facilities from the student occupant’s standpoint can make or break students’ college experienced and plans.” (Ezarik, *Campus Spaces Lay the Foundation for Students’ Success—or Struggle*, 2022) No one wants to teach, live or learn in a run-down space. 30% of students responded that poor maintenance, cleaning, or overall building conditions on their campus had impacted their ability to focus and learn either “some” or “a great deal”. (College Pulse, 2022)

While campus facilities are not a primary factor in most student’s selection of a colleges, it can be a deciding item when students are choosing between their top choices, as can be seen in the importance prospective students and admissions teams place on campus visits, and even more important in terms of student retention and satisfaction. 21% of students participating in a recent Student Voice survey by College Pulse Insights responded that campus facilities factored “a great deal” in their decision to enroll in their college, with another 43% noting that it factored some in their decision. (College Pulse, 2022)

How specific facilities conditions intensify the impact on the ability to focus and learn; percentages show students who say there is a great deal or some impact



Source: Inside Higher Ed/College Pulse survey of 2,000 college students; explore the data [here](#)

(College Pulse, 2022)

LEARNING ENVIRONMENT

The physical campus structures of a university provide the bones around which the institution’s greater learning environment and a student’s overall college experience are built. The Covid-19 pandemic forced a quick shift for most programs across the country from a primarily on-ground and in-person experience to a wholly online or hybrid format. “Students, faculty, and administrators alike have had to relearn what the university experience entails” (Salesforce, 2022) and as institutions return to “normal” business operations some of the most useful adaptations that were made necessary by university closures are being maintained as useful course tools. Students have shown a desire to return to the traditional on ground college experience, while at the same time wanting to keep the convenience and flexibility of online and hybrid course options. Coming out of the isolation and anxiety caused by the pandemic, student needs and expectations have shifted. As noted previously, there is a greater focus on the return on investment, but there is also a greater desire for more holistic student support.

A global survey conducted by Reputation Leaders, Ltd between April and June of 2022 for Salesforce’s Connected Student Report found that 34% of respondents wanted more career planning, 36% wanted more wellbeing resources and 40% wanted more help in balancing academics, work and personal lives. After nearly 3 years of isolation due to the pandemic, including remote and hybrid learning, “many [students] have self-assessed deficits in academic and social skills, which underscore[s] the critical need to develop and market resources that deliver targeted preparation.” (Hanover Research, 2022)

There is also a greater desire for connection and a sense of belonging. The Connected Student Report found that “students who have a strong connection to their institution and a strong feeling of belonging are more likely to have a great experience.” (Teich, 2022) However only 58% of responding students feel some sense of belonging to their university, and only 12% felt like the completely belonged. (Salesforce, 2022)

While students are looking to be more connected with in-person events and interest-based groups or clubs, there is also a strong need for technology assisted personalized communication. 83% of students who reported feeling very connected to their university community stated that “their institution provides easy access to online resources, services and sharing apps.” (Salesforce, 2022)

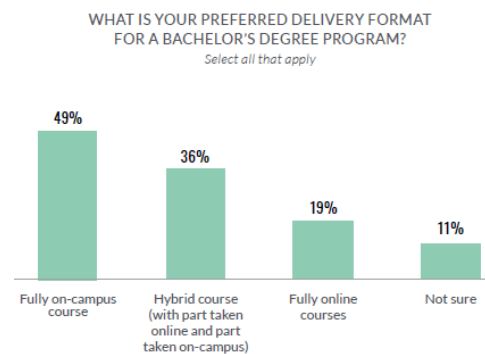


(Salesforce, 2022)

TECHNOLOGY

ONLINE AND HYBRID TEACHING/LEARNING

While students are eager for more in-person and on campus connections, they are less excited about giving up the course modality flexibility made necessary by the pandemic. The percent of students interested in taking fully on-campus courses has declined to just 49% according to a survey conducted by Hannover Research in July of 2022. This was down from 66% in 2020 and 60% in 2021. The same survey noted that 36% of students are interested in hybrid coursework and 19% want fully online courses. (Hanover Research, 2022) 1,082, or 40%, of Brenau's 2,724 registered students for the Fall 2022 semester were enrolled in online programs, split almost equally between graduates and undergraduates.



(Hanover Research, 2022)

“Across many institutions, the ‘emergency remote teaching’ models adopted through the pandemic will give way to a more sustainable and evidence-based models of hybrid and online teaching and learning to support these longer-term consumer preferences. As institutional leaders plan for enhanced resources and infrastructure in support of new hybrid and online programs and course offerings, they will need to focus on developing sound hybrid and online pedagogies and investing in additional staff and services in areas of instructional design and faculty development.” (Pelletier, et al., 2022 EDUCAUSE Horizon Report, Teaching and Learning Edition, 2022)

With most schools now offering at least some online and hybrid courses it is no longer enough just to offer classes online, they must be fully designed and adapted to provide remote students with the best learning experience possible. This requires both technology resources and pedagogical adjustments. Thanks to a Woodruff grant and federal COVID-19 relief funds, Benau's classrooms at both the Gainesville and Norcross campuses were updated during the summer of 2022 with Cleartouch boards that have built in cameras and speakers for easier videoconferencing access and larger lecture spaces were updated to include more microphones throughout the spaces to better share questions and class discussions with those joining remotely.

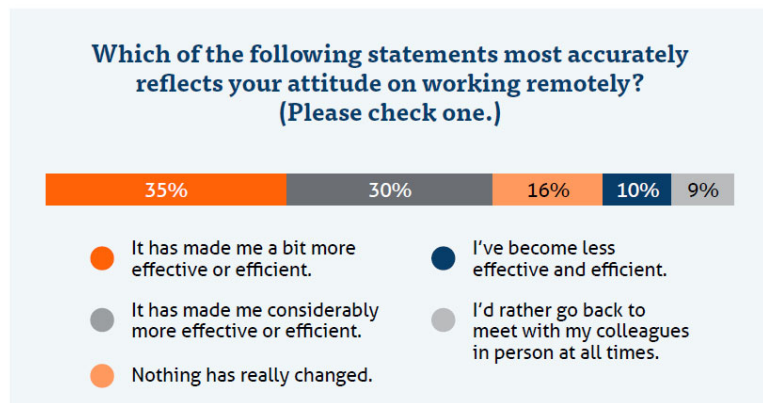
With hybrid and online courses comes a need for hybrid and online support services, and not just for students enrolled in online programs. “As students move through their academic journey, they crave continued support from their university to succeed [... and] that support usually entails services for their wellbeing and technology that curates a personalized experience.” (Salesforce, 2022) One Director of Student Services noted that “about 20% of students want to access our support in person and 80% want to access it online.” (Salesforce, 2022)

REMOTE WORK

Students aren't the only ones seeking remote/on ground flexibility. Many faculty and staff members who were forced to work from home during the pandemic have found that they prefer the flexibility of

working from home at least part time. With the current employment market, higher education institutions, which cannot compete with corporations in terms of salaries, must offer employees other benefits, such as more flexible work options, to retain and attract talent. “With the increase in remote work in many industries, higher education will need to be able to provide remote opportunities to recruit the best talent and retain current employees, especially at rural and under-resourced institutions.” (McNaughtan, Whaley, & Wallace, 2022)

An American Opportunity Survey conducted in the Spring of 2022 found that flexible work arrangements are a top motivator for finding a new job, and 65% of respondents noted that they would be willing to work remotely full-time. (Hughes, 2022) A survey of U.S. College Leaders conducted by The Chronicle of Higher Education showed that 65% of administrators found that working remotely made them more efficient and effective. (The Chronicle of Higher Education, 2022).



(The Chronicle of Higher Education, 2022)

CYBERSECURITY

With more employees working remotely, campus cybersecurity has become more difficult. “The pandemic has increased vulnerability of organizations by permeating the confines of the campus and creating borderless networks.” (Pelletier, et al., 2022 EDUCAUSE Horizon Report, Teaching and Learning Edition, 2022) Of the 7,974,477 devices reporting enterprise malware encounters to Microsoft in the last 30 days, the education industry has reported 80.38%, or 6,409,890 of them. (Microsoft, 2023). Education institutions are appealing targets for attacks for a number of reasons.

- Educational institutions house a wealth of sensitive information, including students’ personal, medical and financial data.
- Tight budgets and long-time internet use means that many institutions often have older, less secure, and often cobbled together systems that require easy network access for students who tend to prioritize convenience to security.
- Conflicting data security and freedom of information compliance frameworks complicate cybersecurity needs.
- Third-party and subcontractor access creates additional potential cybersecurity weaknesses.
- IT teams need to work within limited budgets, leading to insufficient tools and professionals to protect against attacks.
- An attack can cause crippling disruption that can shut down a network, and potentially a campus, for days. (Miller, 2022)

As noted by Brenau’s own Chief Information Officer, the biggest security weakness in any IT system is the users themselves. In efforts to prevent and prepare for attacks, Brenau’s IT department has implemented a single sign-on system to reduce the number of passwords students, faculty and staff need to keep up with, along with a double verification system to confirm user identity. Brenau’s cloud

server backup system also means that if a ransomware attack did occur, the university would only lose, as most, a day's worth of information. Brenau also contracts with a company for an AI bot to test Brenau's network for cybersecurity weaknesses so they can be identified and fixed before an actual attack occurs.

MICROCREDENTIALS

"With the expansion of online and hybrid learning capabilities and emerging shifts in the workforce, [...] microcredentials and other forms of skills-based certifications may be positioned to overtake the traditional college degree as the most common and even most preferred form of postsecondary education and training" (Pelletier, et al., 2022 EDUCAUSE Horizon Report, Teaching and Learning Edition, 2022). The concept of microcredentials is that individuals can obtain a non-degree certification or competency in a certain skill or knowledge area without needing to complete a full degree. With more employers removing the requirement that applicants hold a bachelor's degree in the face of the current limited pool of potential workers, microcredentials showing mastery of certain skills will become more valuable. At some institutions, previously earned microcredentials can also count towards the requirements to complete a bachelor degree. Offering microcredentials can also be a new source of revenue for institutions struggling with enrollment decreases.

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