

Shaping Program Development Strategy

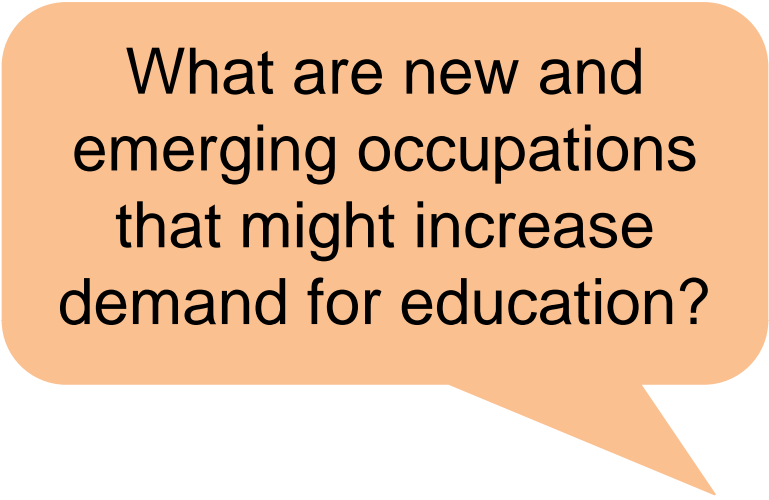
Collaborative Study Key Findings

Eduventures 2012 Annual Member Meeting
June 12, 2012

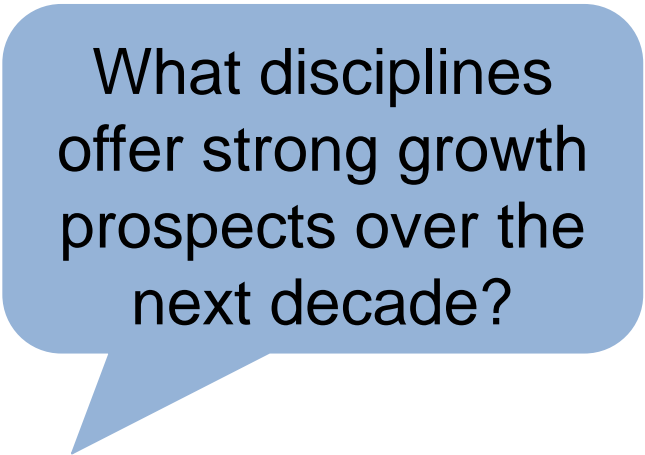
Agenda

- **Rationale for Today's Session**
- **Key Findings**
 - *11 Cases of Market Stability and Growth*
 - *A Look into the Future*
- **Program Prioritization Framework and Discussion**

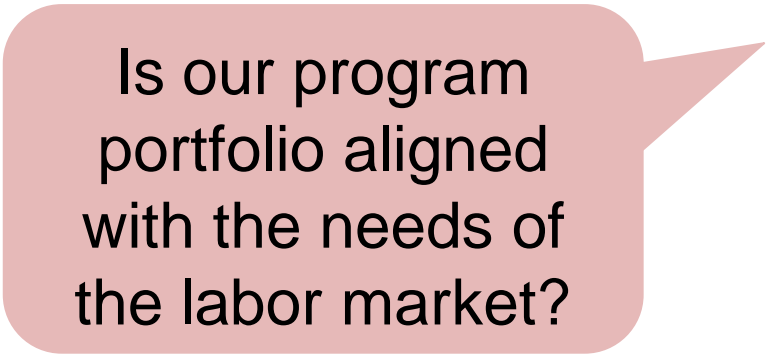
The goal of this research is to assist leaders of adult serving institutions in considering program development opportunities for the future



What are new and emerging occupations that might increase demand for education?



What disciplines offer strong growth prospects over the next decade?



Is our program portfolio aligned with the needs of the labor market?

This research examined the relationship between employment demand and programmatic trends in higher education. And specifically, what can the past 20 years tell us about the next decade?

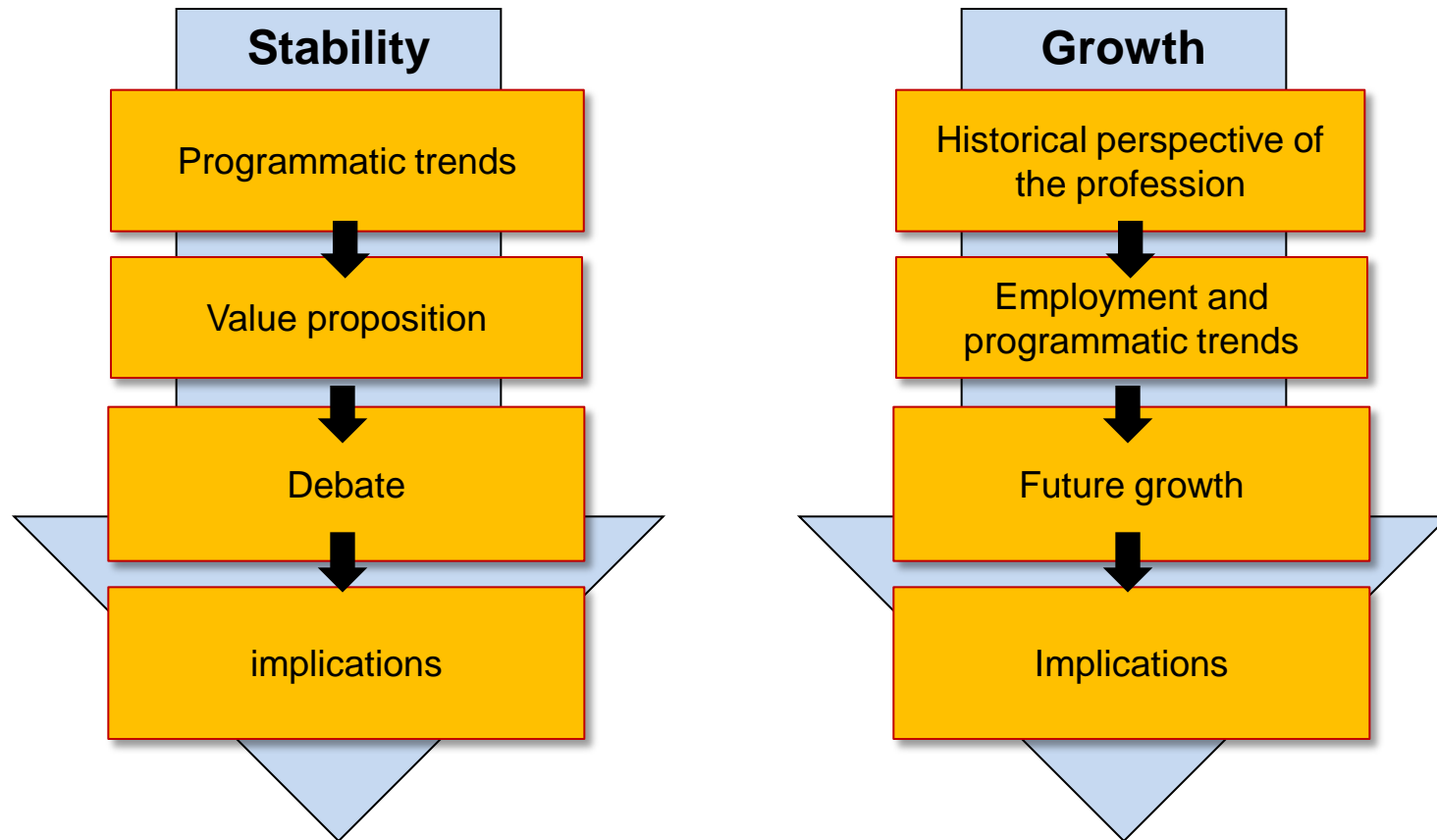
- *What are the main programmatic trends in higher education over the past 20 years?*
- *Looking ahead to the next decade, what disciplines offer strong growth prospects? Why?*
- *How can your institution approach the new program development process effectively and systematically?*
 - *What are the external market variables that inform your institution's decision-making around program selection?*
 - *How can you leverage your institution best to meet local, state, and regional workforce development demands while playing to internal strengths?*
 - *How can you foresee market opportunities best?*

The following 11 disciplines were selected for detailed examination.

Credential Level	Examined Area of Study/Discipline	Rationale for Inclusion	Rank (# Conferrals)		
			1990	2000	2010
Associate's	Liberal Arts and Sciences	Stability	1	1	1
Bachelor's; Master's	Business Administration and Management	Stability	1	1	1
Bachelor's	Psychology	Stability	2	2	2
Associate's	Medical/Clinical Assistant	Growth	43	20	5
Associate's	Health Information/Medical Records Technician	Growth	43	57	29
Bachelor's	Kinesiology/Exercise Science	Growth	134*	62	29
Bachelor's	Registered Nursing/Registered Nurse	Growth	8*	7	3
Bachelor's	Spanish Language and Literature	Growth	42	37	25
Master's	Creative Writing	Growth	91	67	48
Master's	Criminal Justice/Law Enforcement Administration	Growth	145	87	44
Master's	Educational/Instructional Technology	Growth	82	50	39

* In 1992

Eduventures analyzed past trends to uncover patterns that will help CPE-LC and OHE-LC members understand what causes academic fields to *become/remain stable or grow*



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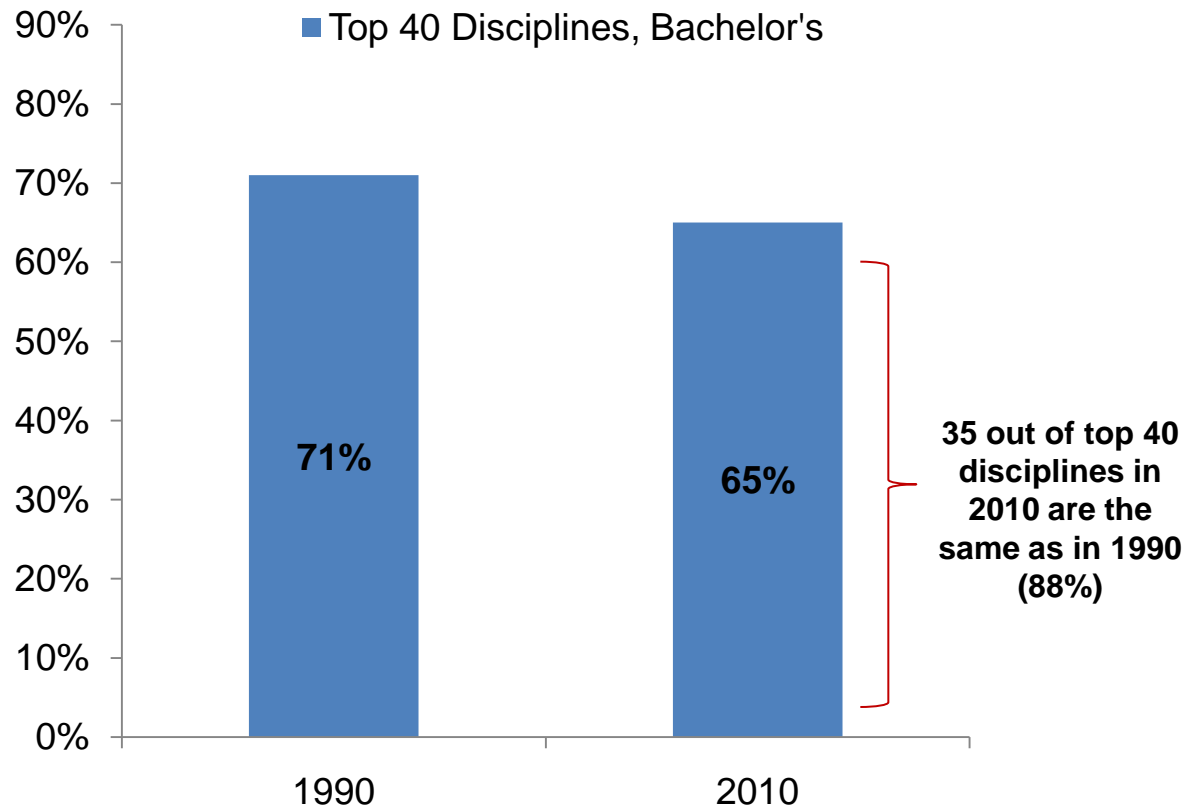
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Interest/demand for postsecondary education has increased tremendously over the past 20 years. Drivers of this phenomenon include:

- Demand for a more educated workforce
- Federal policy momentum in favor of higher education participation/completion

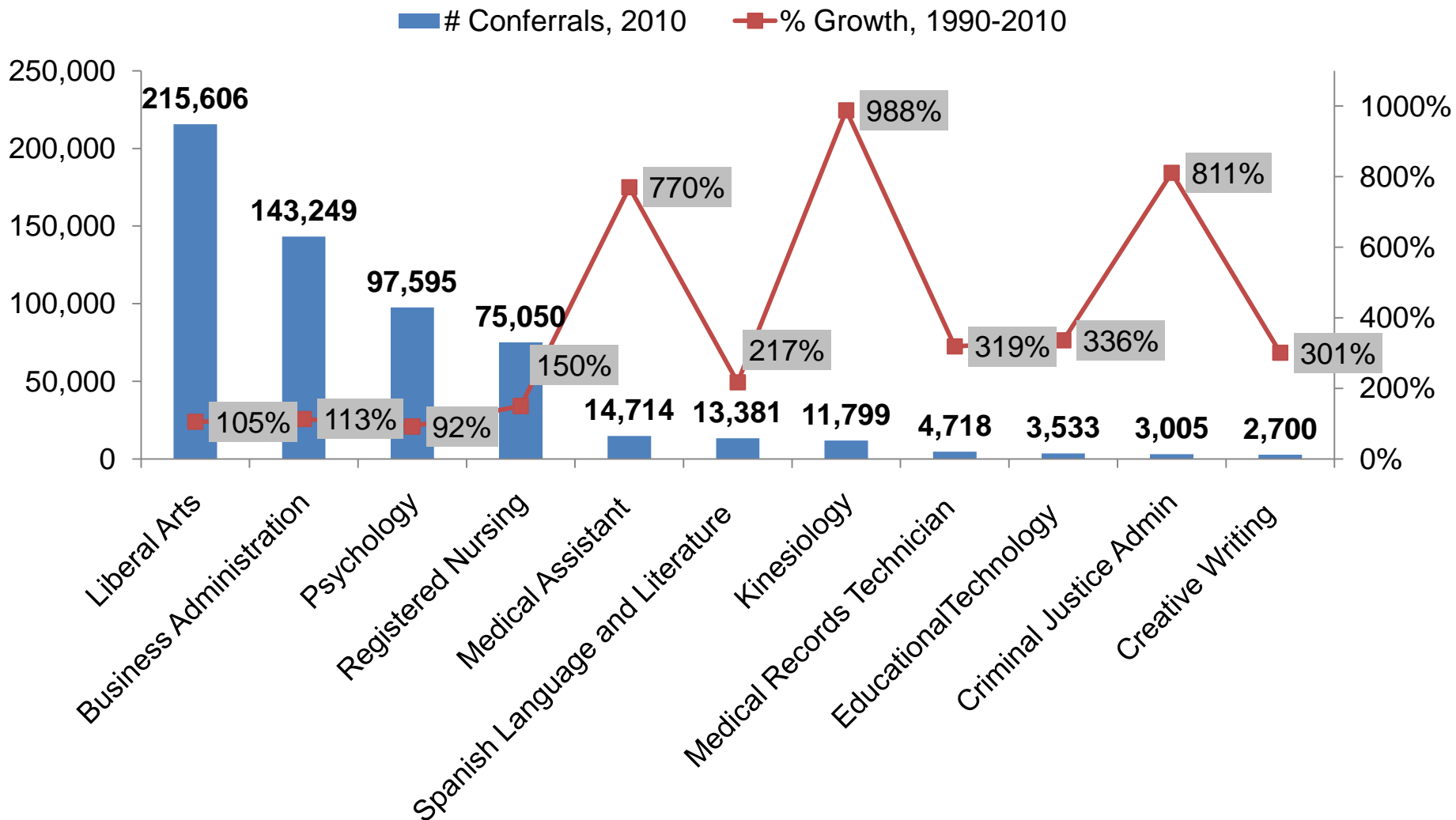
Credential	1990 Conferrals	2010 Conferrals	Percent Change (1990-2010)
Associate's Degree	468,884	876,681	87%
Bachelor's Degree	1,062,728	1,756,771	65%
Master's Degree	328,681	706,304	115%
<i>Average Growth Rate: 89%</i>			
<i>Average Growth Rate Among 11 Examined Cases: 382%</i>			

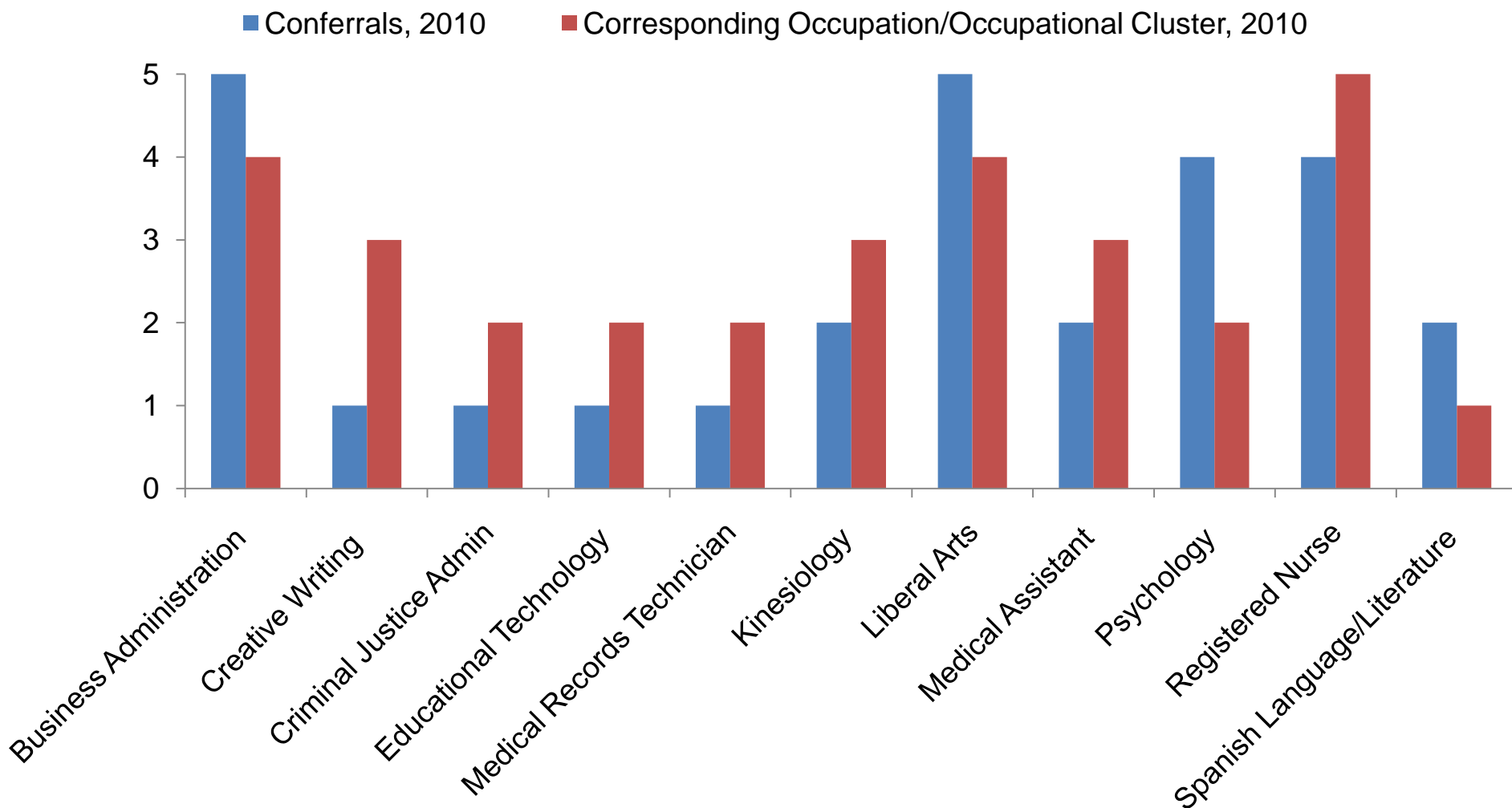
Analysis of conferment data suggest that higher education programming over the past 20 years has been strikingly stable



- ***Business administration and psychology* are the most prominent disciplines at the bachelor's level**
- **New disciplines in 2010 (in top 40):** Spanish Language/Literature; Kinesiology and Exercise Science; Health and Physical Education; Anthropology; Criminal Justice/Law Enforcement Administration
- **Disciplines that have exited the top 40 in 2010:** Speech, Debate, and Forensics; Pharmacy; Radio/Television; Architecture; Special Education

Supply: Higher Education Market (1990-2010)





Discussion

- What is your reaction to these findings?
- Why do you think the higher education market has been so stable over the past 20 years? Do you think this trend will continue in the coming decade? Why/why not?
 - What has caused the three discussed disciplines to become/remain top conferring disciplines over the past 20 years?
- Does stability in the market mean commoditized supply?
 - How can institutions innovate to remain competitive in a crowded, commoditized market?

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These large/stable top-conferring programs will maintain stability in the next decade and beyond

**Business
Administration**
(bachelor's)

**Liberal Arts
and Sciences**
(associate's)

Psychology
(bachelor's)

- Their interdisciplinary curriculum provides students with broad skill sets and diverse career paths. The need for an adaptable workforce is likely to continue to favor broad disciplines by students and employers alike.
- Continuing and online education have built a strong presence in these fields, especially *business administration and management*, and *psychology*. Interest in *liberal arts* programs has increased, particularly in some subsets of the market.
- Is sustained institutional success going to come from an ongoing presence in those markets?

Longstanding challenges question the relevance of broad education;
These challenges/debates might shape these disciplines, but will likely have no effect on future growth

- Example: **Business Administration**

Debate:

- Sustained critique of an alleged disconnect between the higher education experience and employer needs
- Concerns over maturity of business education; yet conferral trends suggest otherwise

Discipline	% of all <i>Business</i> Bachelor's Degree Conferrals in 1990	% of all <i>Business</i> Bachelor's Degree Conferrals in 2000	% of all <i>Business</i> Bachelor's Degree Conferrals in 2010
Accounting	18.4%	13.8%	14.1%
Business Administration and Management	27.6%	35.1%	38.3%
Finance	10.9%	9.4%	9.2%
International Business	0.6%	1.5%	1.7%
Hospitality Administration	1.6%	0.7%	1.8%
Marketing/Marketing Management	12.1%	10.0%	9.2%
Management Information Systems	1.2%	5.8%	1.8%

Implications:

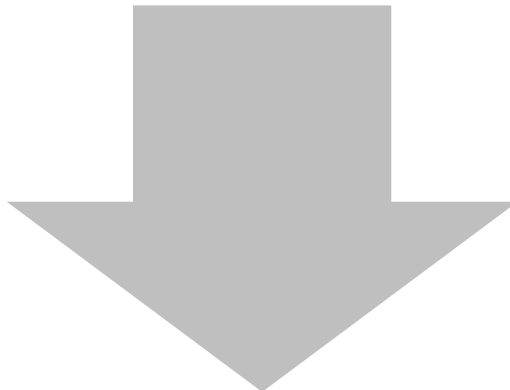
- Favorable employment projections of related occupations
- Sustained interest in business education, particularly at the bachelor's and master's level
- Evidence of strong salary performance for business graduates

Staying attuned to occupational trends and learner needs is critical to driving innovation

- Overall, at the associate's and master's degree level, higher education programming has reflected occupational trends.
 - Examples include healthcare (e.g., *medical assisting*, *medical records technician*), criminal justice, and information technology disciplines
 - External variables (e.g., changes in laws/regulations, technology, society) have influenced the corresponding occupations, and higher education has responded
- Continuing and online education have built a strong presence in many of these fields, and for some of them online delivery is mainstream.
- Eduventures' analysis of conferral and occupational trends for the 1990-2010 period indicate for most of these fields conferral growth has not caught up with employment growth, suggesting growth potential in the future.
- How can institutions foresee market opportunities best?

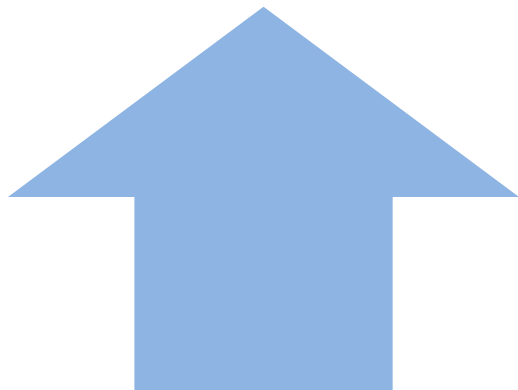
Does capturing growth mean innovation in program development, or investment in successful existing programs?

Build on Existing Areas of Strength

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- What existing areas of strengths for the institution resonate with regional, or national areas of interest and growth?
 - Which faculty work, unique pedagogies, or research projects have the greatest impact when recruiting students?
 - What ideas or areas have solid faculty, plans, and vision for growth?
 - What are the institution's potential competitive advantages in niche markets and/or with underserved populations?

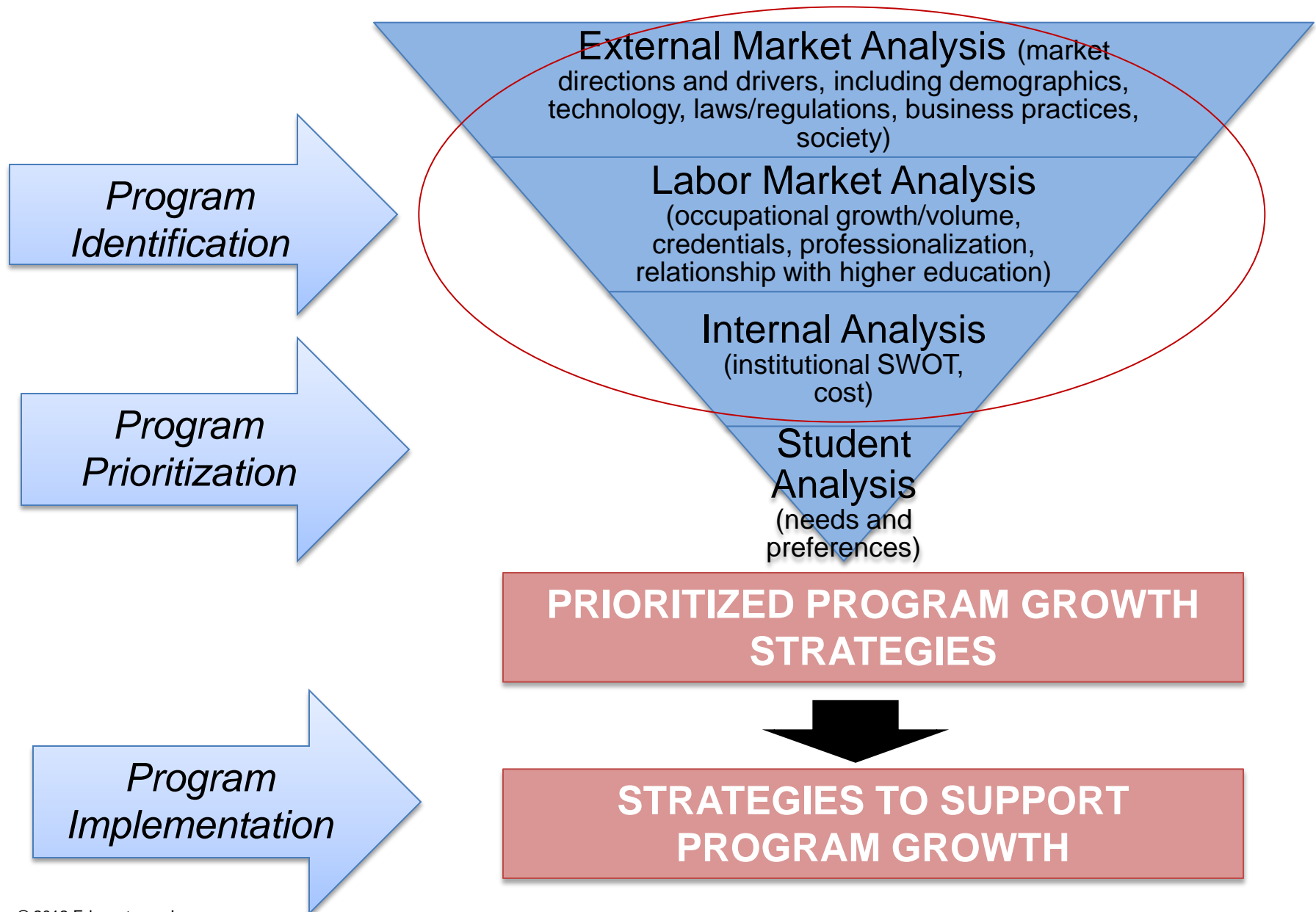


Explore New Opportunities

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- What unique program opportunities can be brought forth by community, regional, or national areas of interest and growth?
 - Does the institution have the faculty and internal resources to leverage these opportunities?
 - To achieve its mission and vision, which new initiatives, or areas of growth need to be created or achieved?

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Key considerations to start the process

External Market Analysis

What are the current/upcoming community, regional, or national areas of interest and growth?

Are there any upcoming changes in technology, laws/regulations, or business practices?

How might these changes affect the regional, or national labor market?

Labor Market Analysis

How might the labor market respond to regional or national areas of interest and growth?

How would these changes affect specific industry/occupational clusters in terms of volume and growth in the next decade?

How will academia respond to these changes?

How will professional associations/accrediting bodies respond to these changes?

Is there an opportunity for your institution to enter the market, or form a partnership with a professional association?

Internal Analysis

What are your institution's mission, and goals? Are they to:

Create a niche or brand

Build a stronger reputation

Create a larger market share

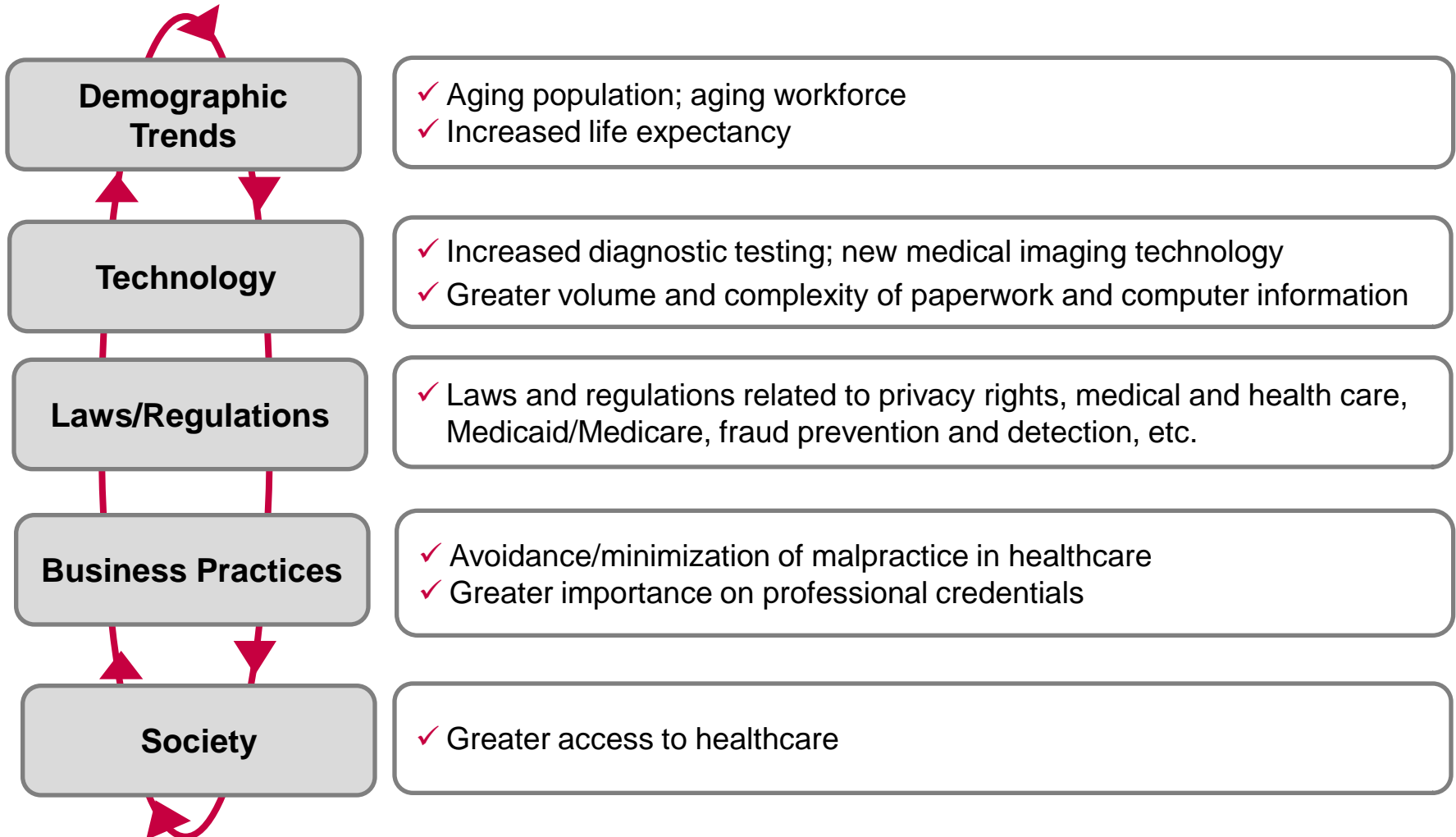
Expand academic offerings

Be a leader and innovator in education and/or research

Offer greater access to education

Case Study: *Associate's in Clinical/Medical Assisting*

External market factors that might affect the medical assistant occupation, and increase the demand for education include changes in:



Possible screening factors for new programs

Labor Market Analysis		Example: <i>Medical Assistant (associate's)</i>
Market Attractiveness	What is the size of the corresponding occupational field (regionally and nationally) and is it projected to grow?	1990: 165,000 2010: 527,600 % change: 220%
Relationship with Higher Education	Is a postsecondary degree (e.g., bachelor's degree) required for entry into the profession currently? Is this likely going to change? How?	Typical education needed for entry into occupation: high school diploma or equivalent + moderate-term on-the-job training
	What is the most sought after credential? Is this likely going to change?	In 2010, 34% of medical assistants had high school diploma or less; 38% had some college, no degree; 17% had an associate's degree
	Is licensure required for entry into the profession?	Currently, no state in the U.S. has instituted general licensure for medical assistants. The American Association of Medical Assisting (AAMA) is a professional association promoting voluntary certification for medical assistants.
Other Factors to Entry	Takes into account other factors such as the ability to offer online (if considering online programs)	No clinical components; no major barriers to online delivery

Possible screening factors for new programs

Internal Analysis		Example: <i>Medical Assistant (associate's)</i>
Strategic Fit	What strategic need will this be fulfilling? Geographic growth? Programmatic growth New customer segment?	Do we need to grow capacity in this area because of affinity with our current strengths or perceived gap in our portfolio? Are our current offerings in this area serving an outdated need or an audience that is evolving to this new area?
Fit with Institution	Does the program fit with our organization and with our mission? Strategic direction?	Do we have faculty with research or teaching interests in this area? Do we have strategic partnerships or relationships with external organizations in this area?
Operational Ownership	How much burden will be on our organization versus the academic unit?	Is this an entirely new kind of program or audience, or is this a new segment of program or audience that we feel familiar with (vis a vis our systems, services, and support)?
Financial Factors	How many enrollments will this drive? How are the revenues shared with the college/school? How much will it cost in start-up fees, then maintenance? Positive ROI?	What new equipment or facilities will we need? Are adjuncts in this area more expensive? What incentives are meaningful to faculty in this area?

Discussion

- What are the implications of these findings?
- How can you use this data/framework at your institution? How can it help you make better-informed new program development decisions?

Case studies: which discipline(s) represents the best growth opportunity?

Associate's in Early Childhood Education and Teaching

- External market analysis
- Labor market analysis
- Internal analysis



Bachelor's in Hospitality Management

- External market analysis
- Labor market analysis
- Internal analysis



Master's in Social Work (MSW)

- External market analysis
- Labor market analysis
- Internal analysis

