



**Schools of Education
Learning Collaborative**

***Understanding the Evolving Market for
Initial Teacher Preparation Programs***

***Eduventures Annual Member Meeting
June 11, 2012***

Background for This Study: *Understanding the Evolving Market for Initial Teacher Preparation Programs*

In 2010-2011, SOE-LC members reported seeing decreased enrollments in initial teacher preparation programs.

In 2011, the SOE-LC membership voted to commission a Collaborative Research project to better understand the market for initial teacher preparation programs

From January-May 2012, Eduventures analyzed data from the following sources to gain insight into the current and future initial teacher preparation market, and to formulate market estimations and projections that do not exist elsewhere:

- Title II*
- National Center for Education Statistics*
- AACTE's PEDS database*
- National Center for Education Information*
- U.S. Bureau of Labor Statistics*
- U.S. Census data*
- In-house Eduventures surveys of prospective teachers conducted in 2011*

The market estimations and projections that comprise the findings from this research are unique to Eduventures and its Schools of Education Learning Collaborative membership, and are not available from any other national organizations.

Goals of This Session

- Understand enrollment trends nationally across initial teacher preparation programs
- Gain insight into drivers affecting enrollment
- Identify potential strategies for schools of education to maintain/grow enrollments across initial teacher preparation programs

Agenda

- **National Teacher Demand & Supply**
- **The Initial Teacher Preparation Market:**
 - **“Alternate” Routes and Adult Learners / Career Changers**
 - **Traditional Undergraduate Students**
- **The Bottom Line: Strategies for University Providers**

Teaching continues to be a challenging profession in the current climate.

- The movement from “highly qualified” to “high quality” has driven controversial changes to the compensation structure
- State budget deficits → K-12 budget deficits → teacher layoffs
 - In March of 2012, almost 20,000 teachers in the state of California receive pink slips.
- Immense pressure to increase P-12 student achievement and standardized test scores
- The 2012 *MetLife Survey of the American Teacher* found that job satisfaction is the lowest-ever in over two decades

I think the undergraduate education students at your university and all universities across the state should be warned and encouraged to consider a different degree. Teaching is next to impossible, and I'd warn them to "turn back before it's too late."

*--Indiana teacher;
April 2012*

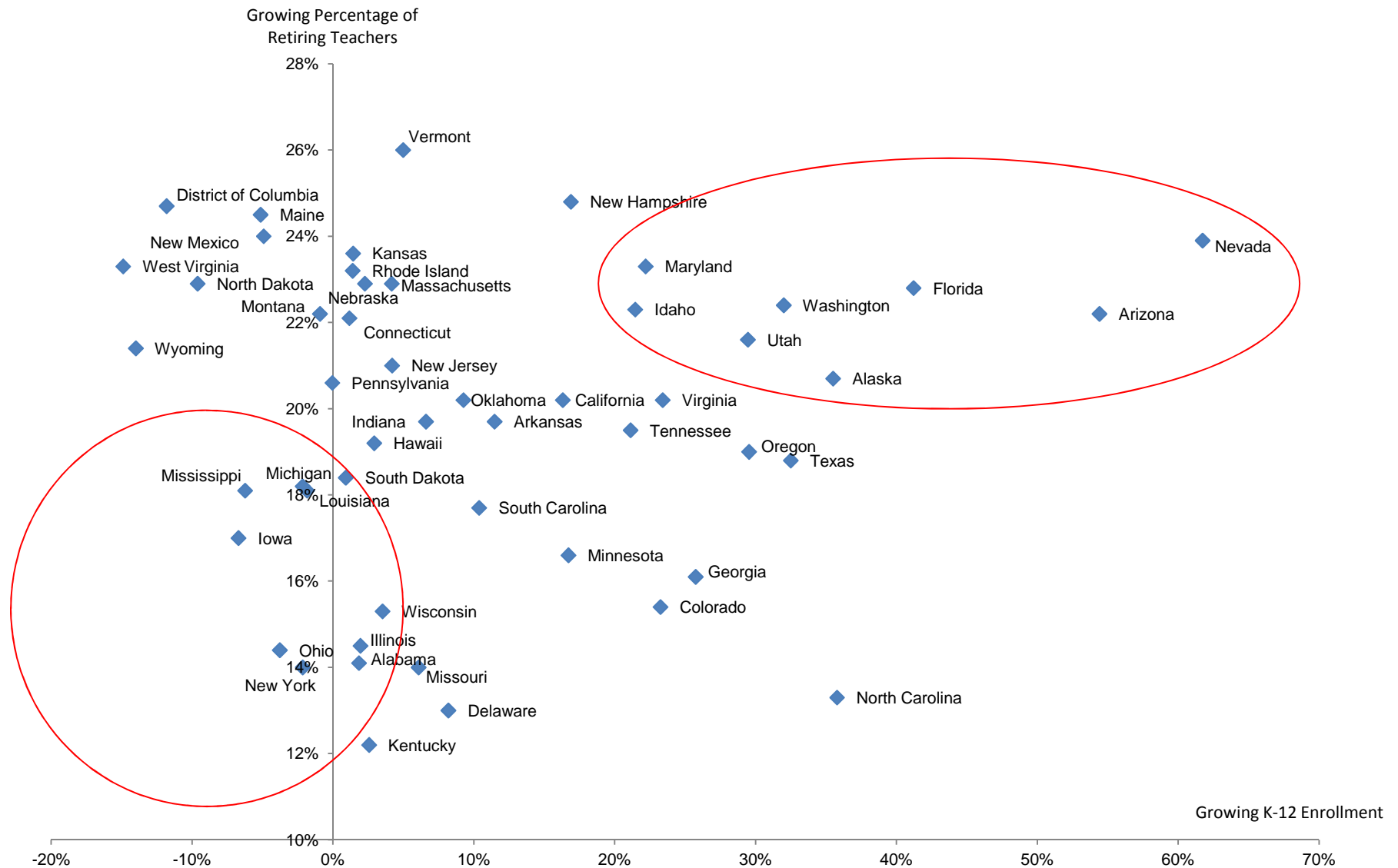
In the short-term, difficult conditions and negative press will contribute to slower growth for enrollments in teacher preparation programs.

K-12 Enrollment is projected to rise in the next decade, in particular across early grades. In addition, across the teaching profession, a significant number of retirements are expected.

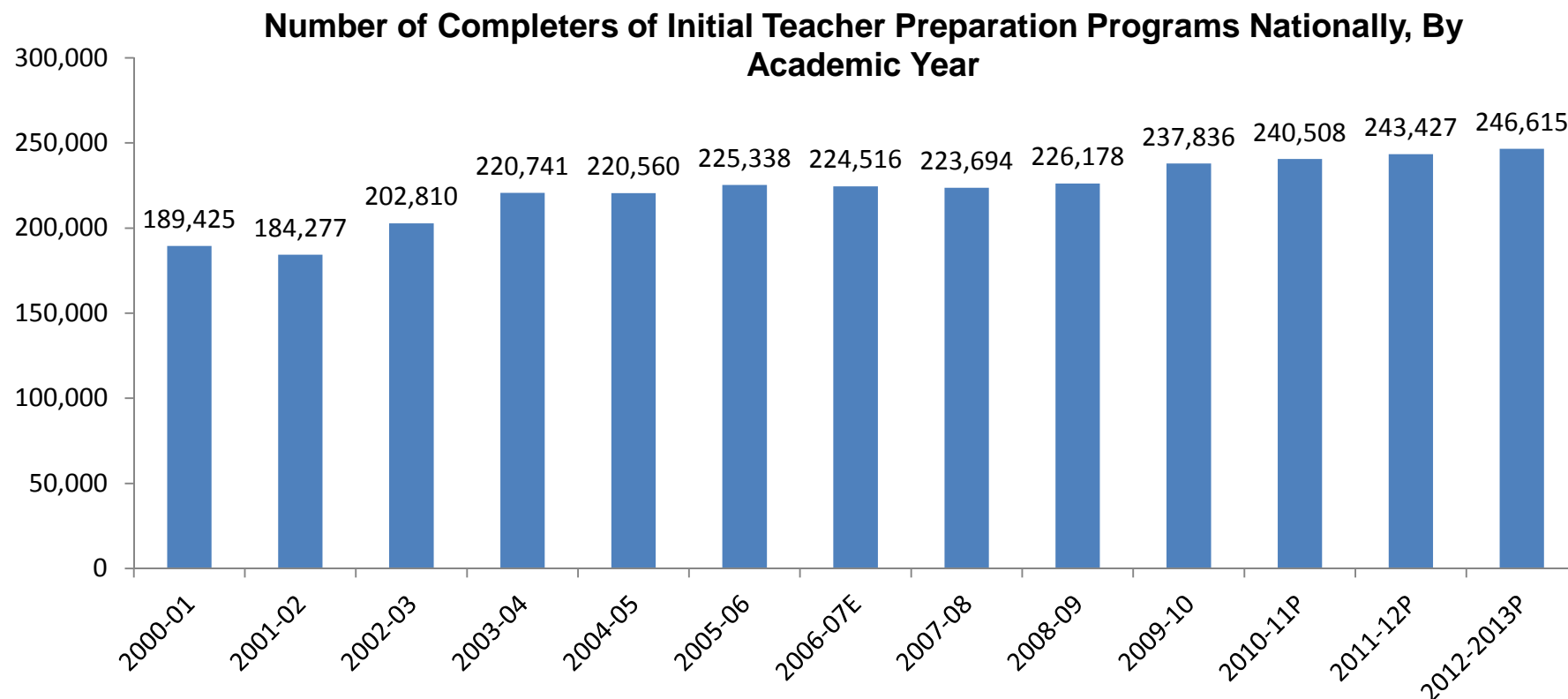
Occupational Title	Employment, 2010	Projected Employment, 2020	Change, 2010-20	
			Percent	Numeric
Kindergarten Teachers, Except Special Education	179,200	211,900	18	32,700
Elementary School Teachers, Except Special Education	1,476,500	1,725,300	17	248,800
Middle School Teachers, Except Special and Career/Technical Education	641,700	750,000	17	108,300
Secondary School Teachers, Except Special and Career/Technical Education	1,037,600	1,109,500	7	71,900

These factors will drive an increased need for teachers in the long-term, which will in turn drive renewed initial teacher preparation program enrollments nationally.

The need for teachers will vary dramatically by state; however.



In the past decade, the number of teachers prepared across the country has grown mildly.

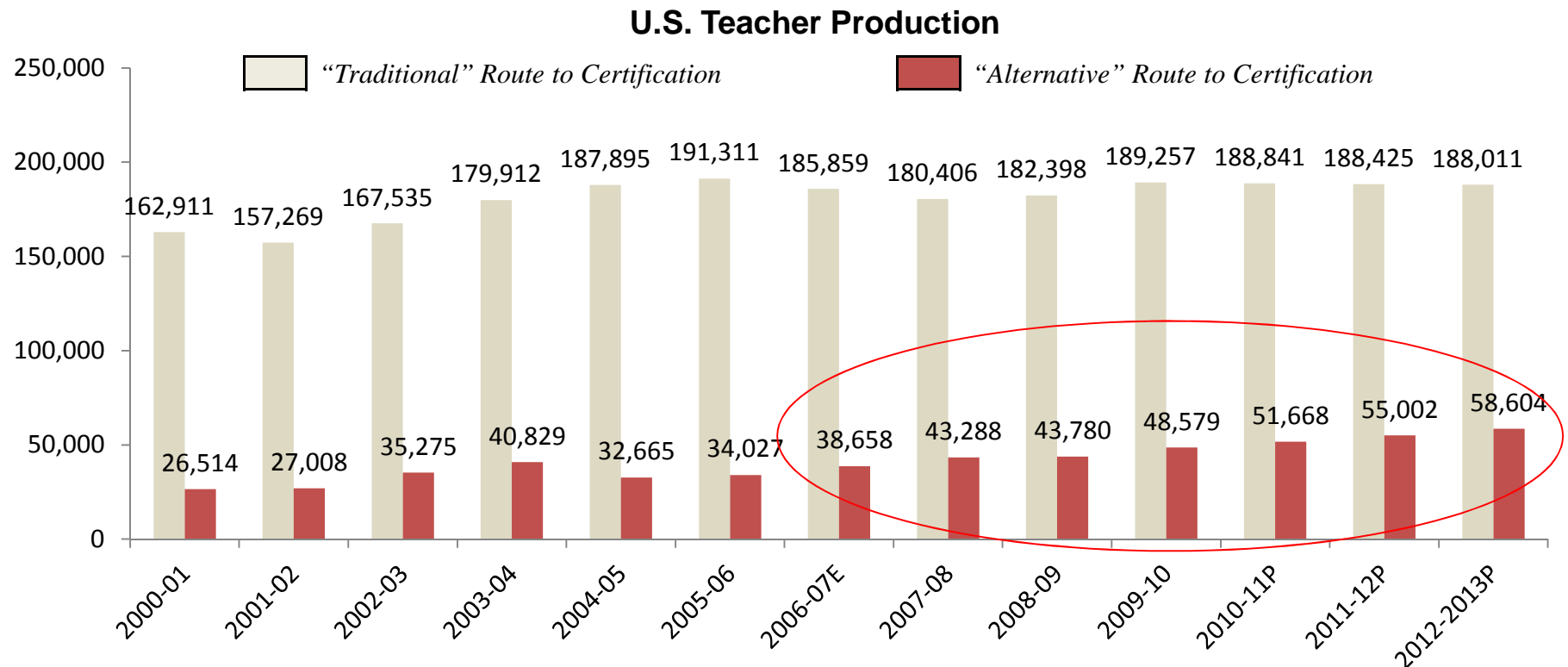


Universities remain the largest producers of teachers (~85% in 2011-12), versus non-university-based “alternate route” providers (~15% in 2011-12). However, non-university-based providers are driving most of the growth in production.

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Most of the growth in the overall market for initial teacher preparation programs has occurred across “alternative” routes to initial certification.

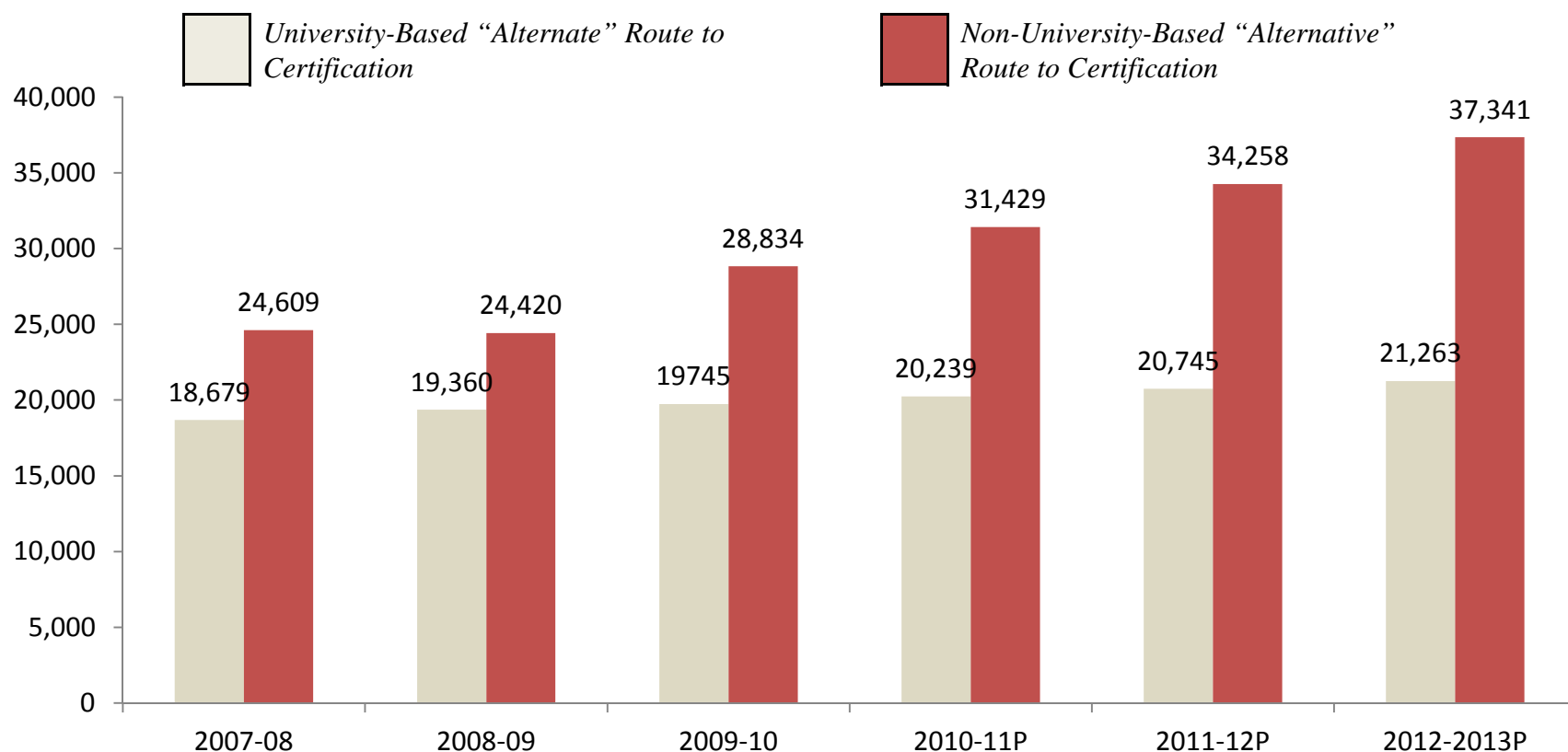


Year to year growth rates in the number of teachers produced via “alternative” routes to teacher certification have risen as high as 16% annually over the last decade, in comparison to a high of 7% for “traditional” routes to teacher preparation.

Source: U.S. Department of Education Office of Postsecondary Education Higher Education Act Title II Reporting System and Eduventures Analysis 10

Not only does data suggest that “alternate” route programs have grown overall, but across “alternate” route programs, the significant growth has been among those that are not university-based.

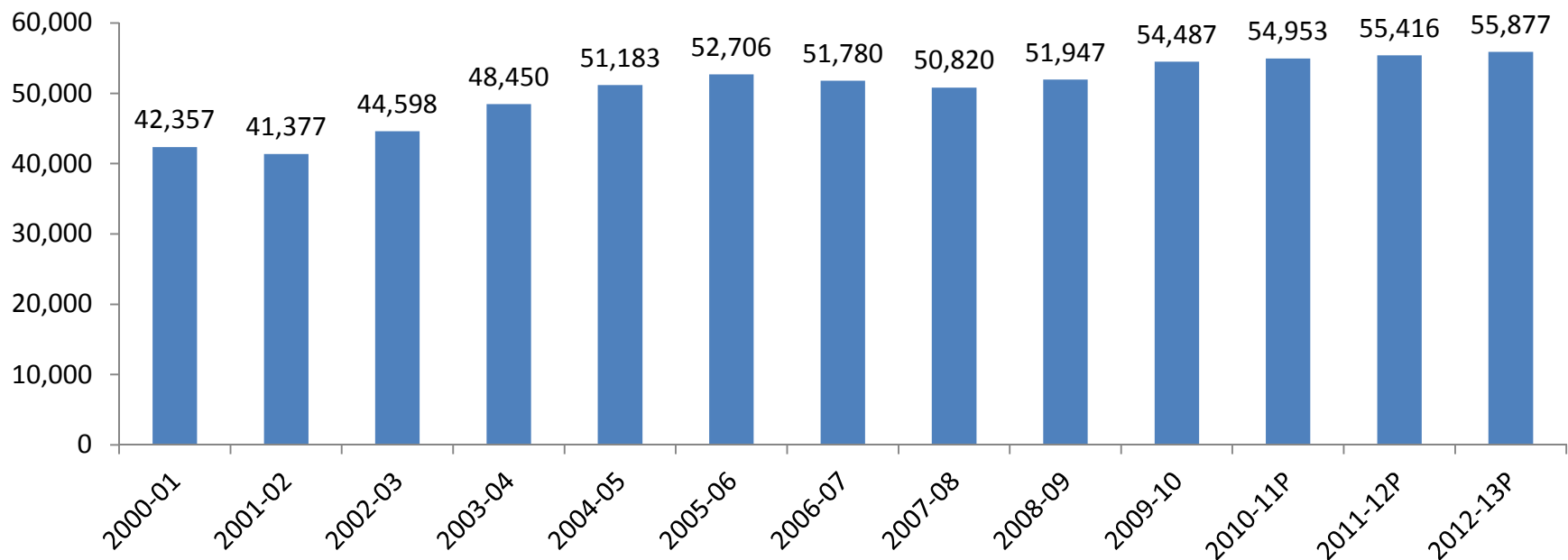
U.S. Teacher Production Via “Alternative” Routes



Source: U.S. Department of Education Office of Postsecondary Education Higher Education Act Title II Reporting System and Eduventures Analysis

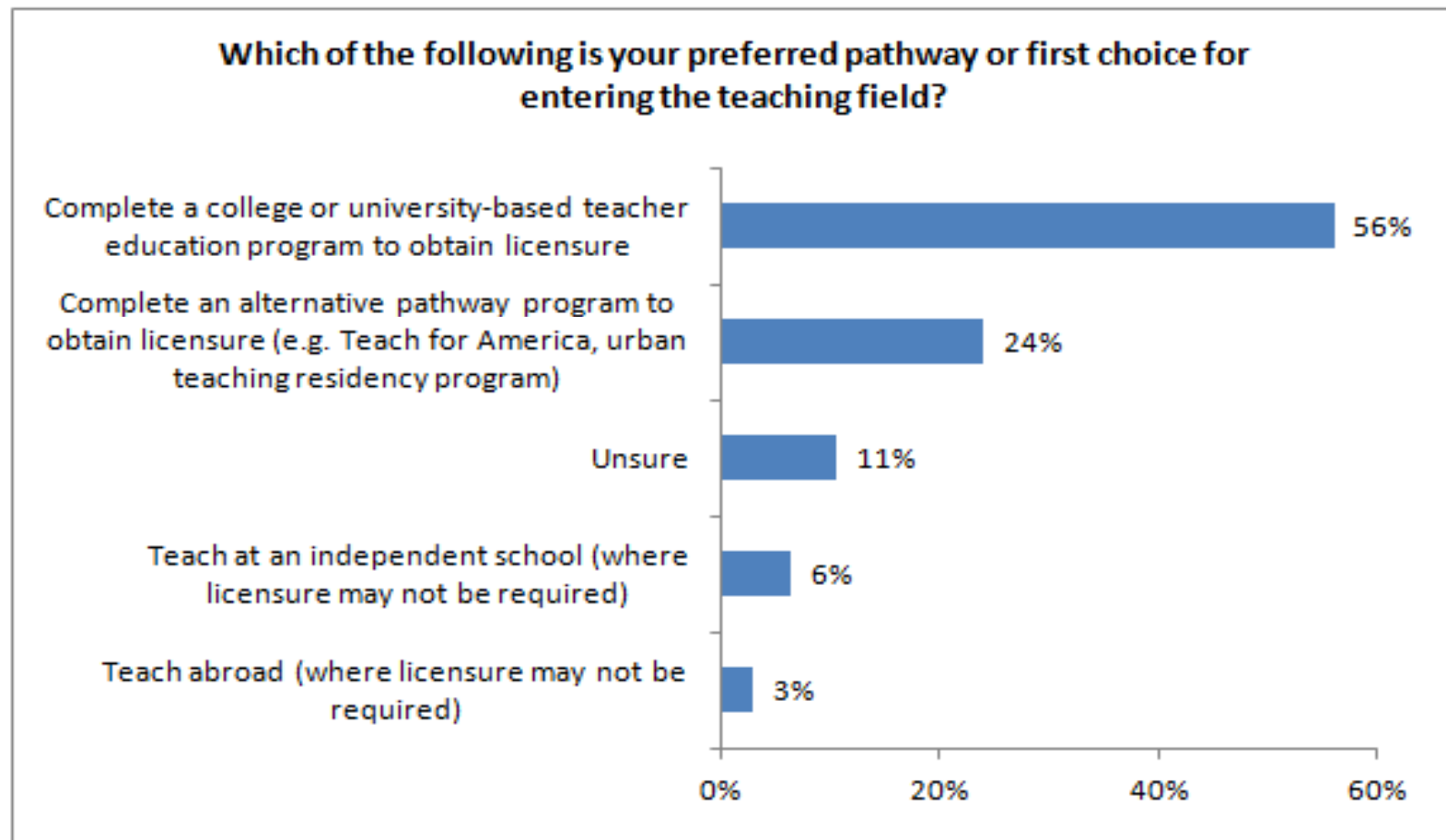
University-based “traditional” graduate routes to teacher certification have grown in the past decade, but growth has slowed in recent years and this trend is expected to continue.

Estimated Number of Master’s Degrees Awarded Nationally Leading to Initial Teacher Certification

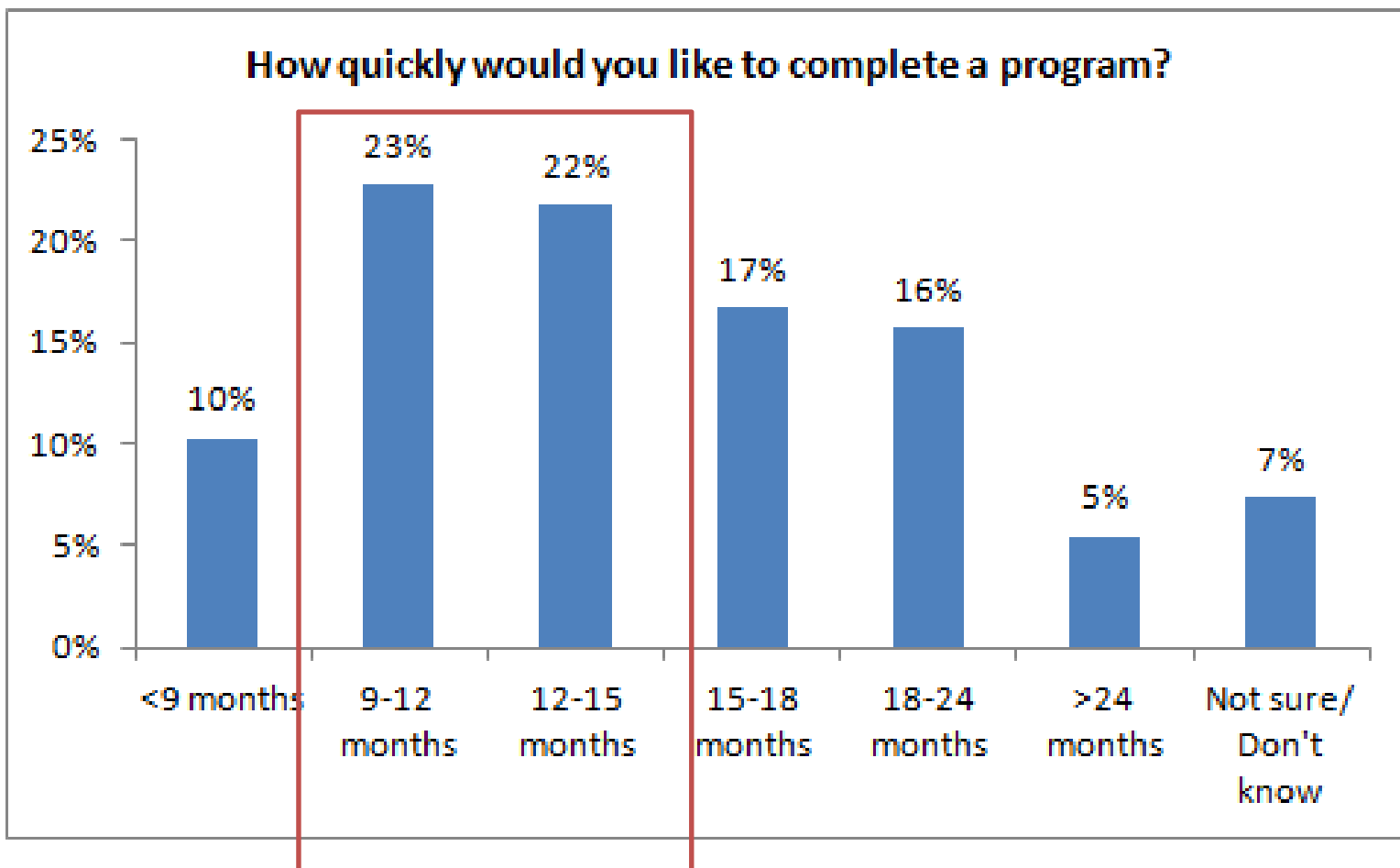


Along with university-based “alternate” route, Master’s programs are competing with non-university-based “alternate” routes to certification for teacher education enrollments.

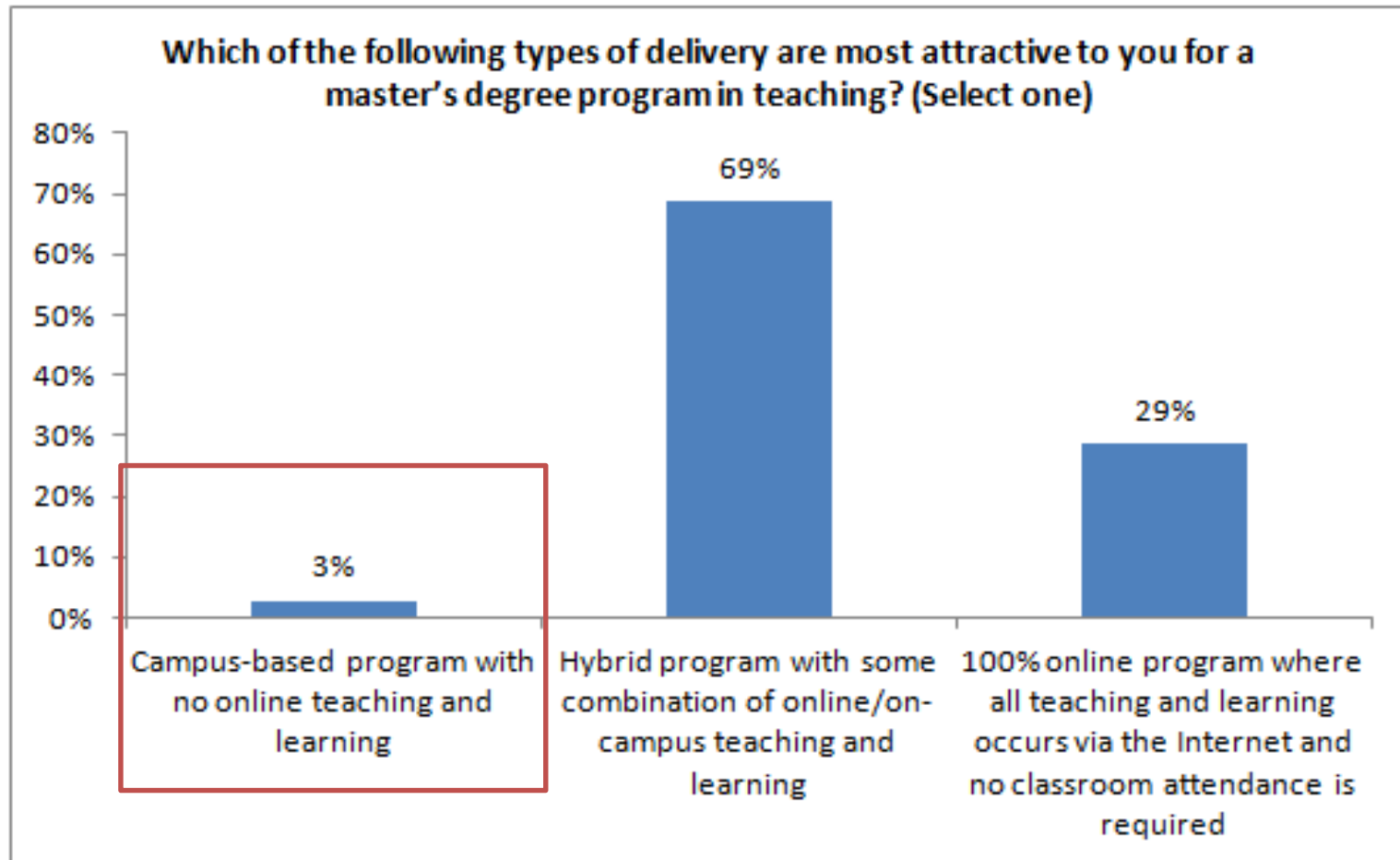
Non-university-based “alternate” route programs are popular across career-changers, though about half of career-changers still prefer university-based programs.



Career changers also seek quick entry into the classroom and online learning.



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Universities have the means to compete for enrollments aggressively with non-university-based programs, but have been slow to adapt, publicize, and effectively market.

- Seek out the means to develop and publicize high quality “alternate” routes that directly compete with non-university-based “alternate” routes.
- Differentiate your university-based programs with their strong outcomes.
- Leverage your strong brand/reputation.
- Incorporate online learning.
- Ensure that programs targeted to adults/career-changers highlight opportunities to engage in K-12 classroom learning quickly.

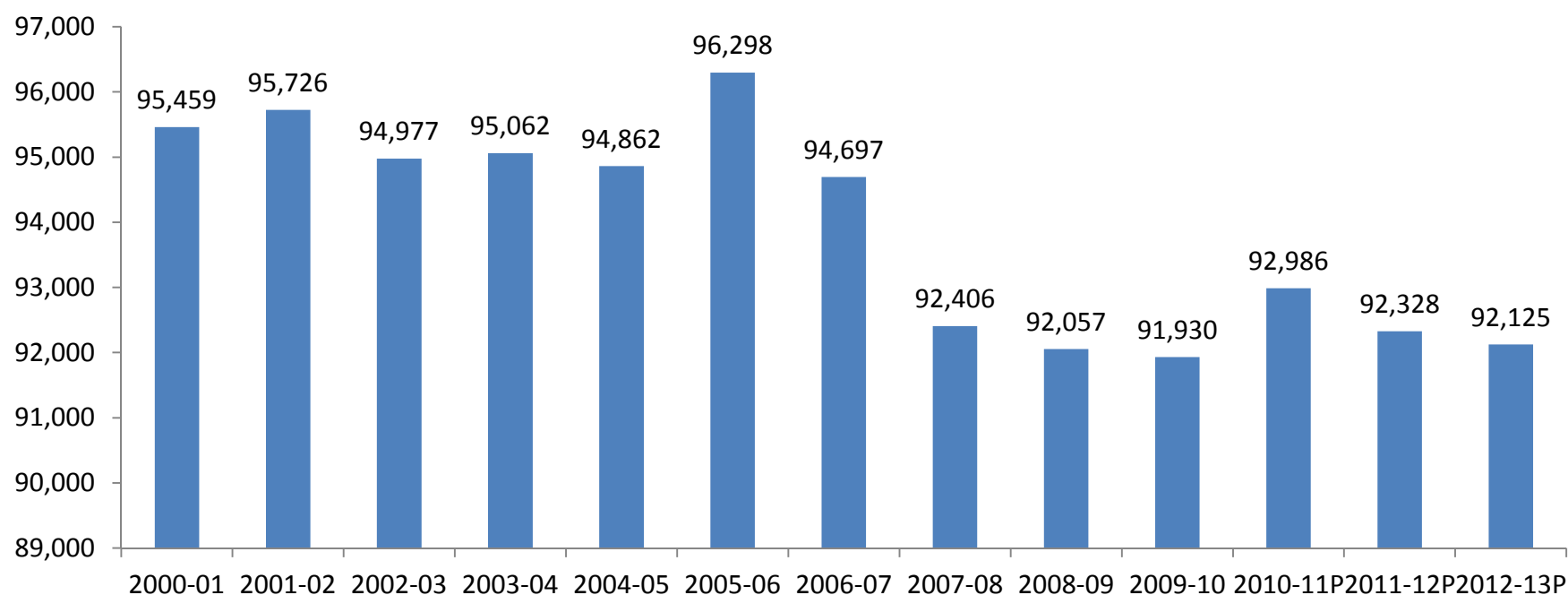
Inaction across university-based providers will continue to drive growth across the non-university-based market.

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While they are still producing the largest share of the nation's teachers, undergraduate/Bachelor's programs in education are on the decline nationally.

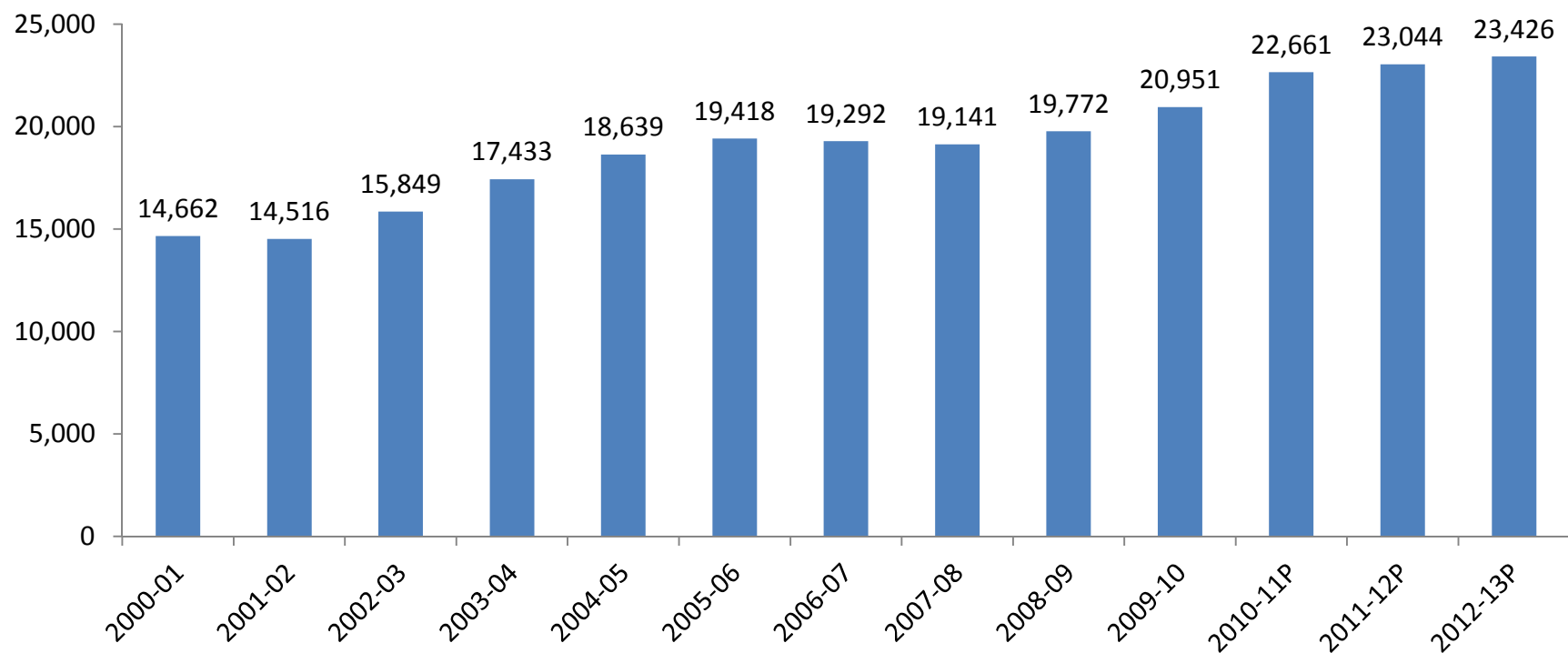
Estimated Number of Bachelor's Degrees Awarded Nationally Leading to Initial Teacher Certification



This trend is estimated to continue, as some states move away from general undergraduate teacher preparation programs toward licensure requirements favoring bachelor's programs in content-related areas, and post-baccalaureate or graduate-level education programs that provide additional coursework in teaching pedagogy.

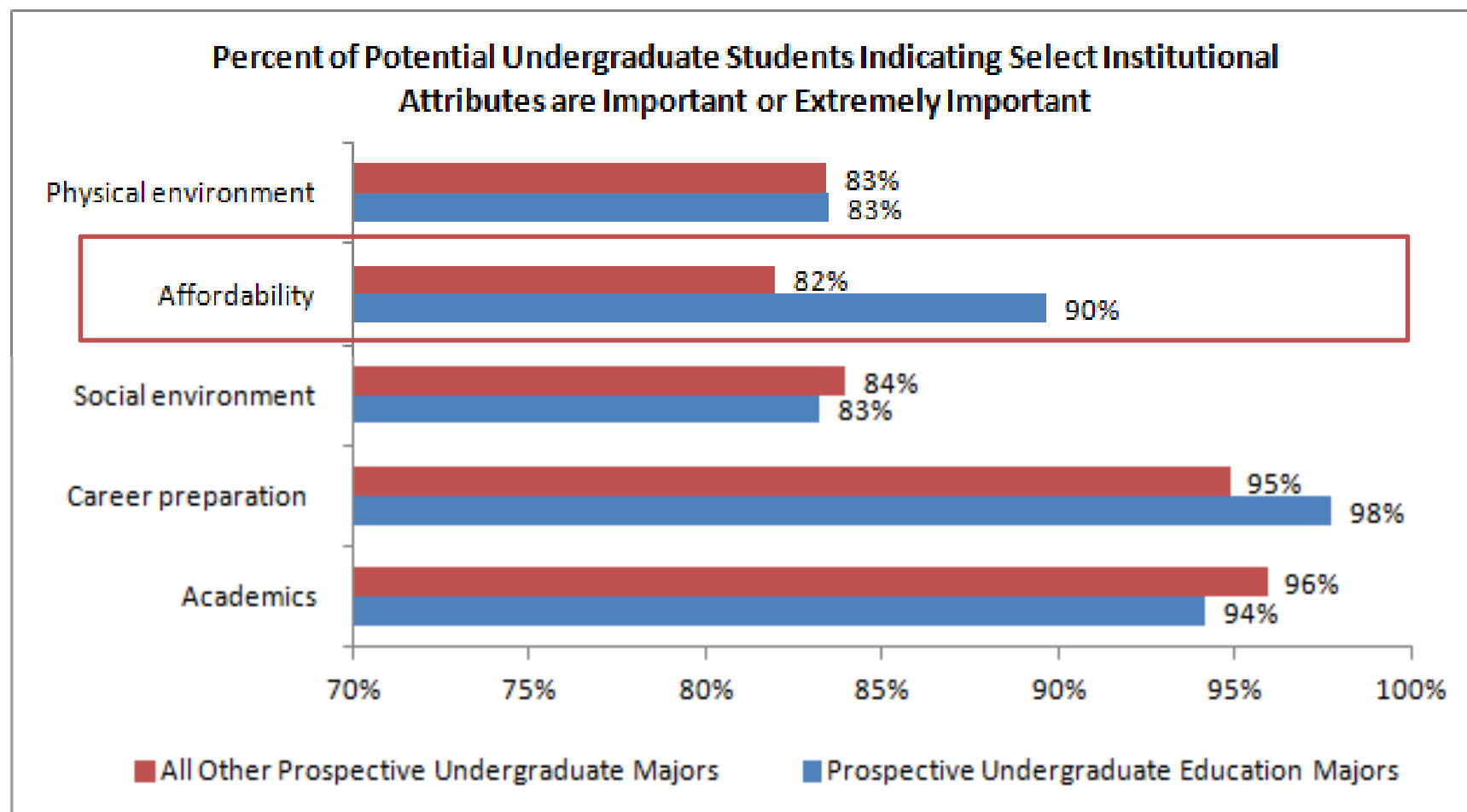
Teacher production via combination Bachelor's/Master's programs has shown some growth in recent years.

Estimated Number of Individuals Nationally Completing a Bachelor's/Master's Combination Program Leading to Initial Teacher Certification

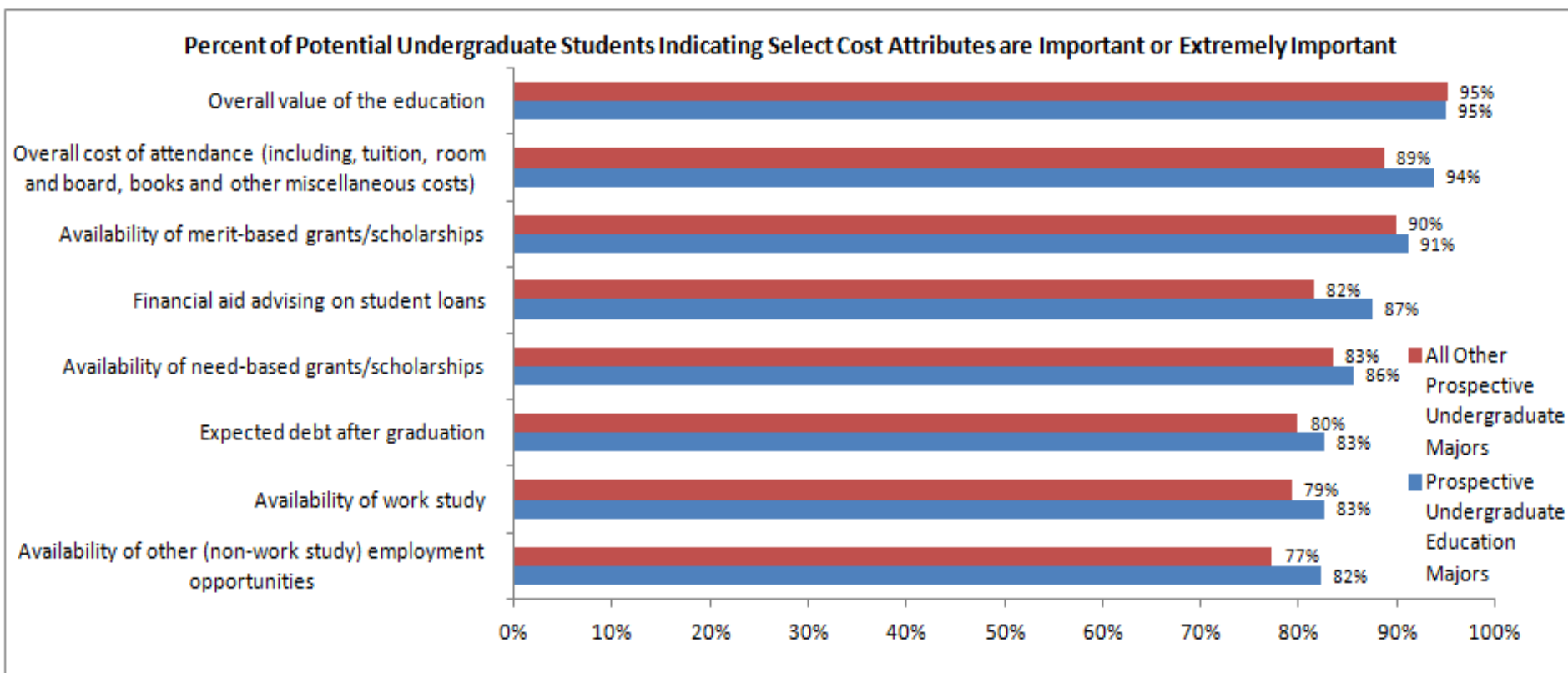


This trend is aligned with movement away from a purely undergraduate experience for teacher preparation. While some growth has occurred in this market over time, these programs will experience only limited in the growth in the near future.

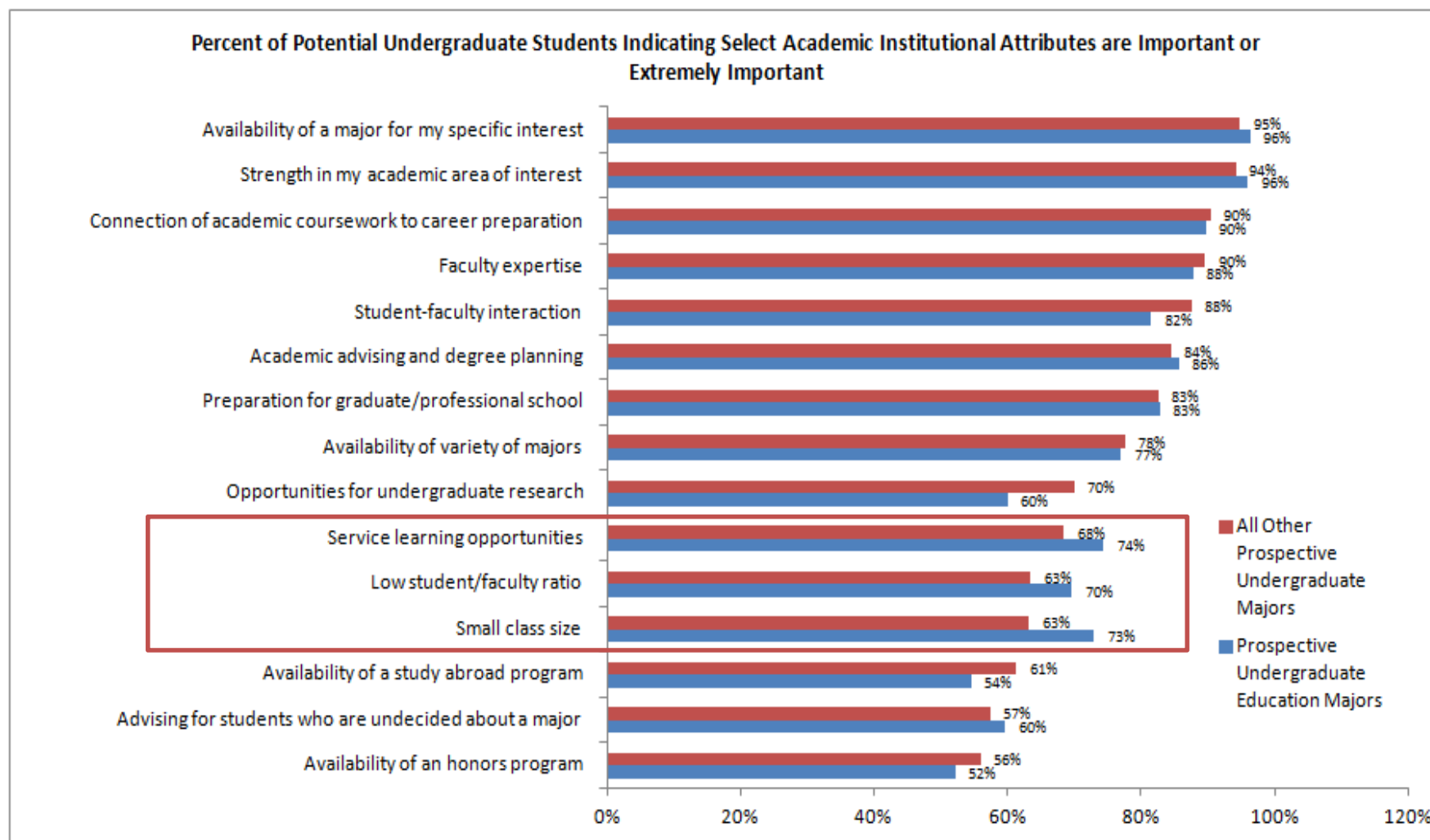
Affordability is a key factor in undergraduate education students' enrollment decisions.



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Potential undergraduate education students also value service learning opportunities and opportunities to engage directly with faculty.



The undergraduate market for initial teacher preparation will continue to be strong in terms of overall volume comparatively, but enrollment is expected to continue to decline and competition will be challenging.

- Undergraduate education students are particularly price-sensitive. Relatively higher-priced undergraduate programs will have a difficult time maintaining enrollments in the increasingly competitive climate.
- Preparation programs in areas of the country where there is expected to be population decline will experience a more difficult time maintaining enrollments.
- Effective differentiation will be crucial for maintaining or growing enrollments across undergraduate or Bachelor's/Master's combination programs. Highlight opportunities for:
 - Financial aid
 - Work study or other student employment
 - Service learning
 - Small class sizes and low student-faculty ratios

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University-based programs still produce the most teachers. However, non-university-based programs have experienced rapid growth in recent years, and this trend is projected to continue. Furthermore, the market is not projected to experience growth overall in the near-term.

Estimated Compound Annual Growth Rate for U.S. Initial Teacher Preparation Programs Over the Past Five Years (2007-08 – 2011-12 Academic Year)

Provider	Program Type	CAGR	Approximate Volume of Teachers Produced, 2011-12	Approximate Initial Teacher Preparation Market Share, 2011-12
University-Based Providers	“Traditional” Bachelor’s Program	0.01%	92,125	37%
	“Traditional” Post-Baccalaureate Certificate Program	2.07%	16,635	7%
	“Traditional” Bachelor’s/Master’s Combination Program	3.45%	23,426	9%
	“Traditional” Master’s Only Program	1.47%	55,877	23%
	“Alternative” Route Program	1.89%	21,263	9%
Non-University-Based Providers	“Alternative” Route Program	8.86%	37,341	15%

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The Million Dollar Question:

How can university-based programs effectively compete? How can universities maintain or grow enrollments in initial teacher preparation programs in this challenging market?

Strategies for University Leaders' Consideration:

- Institution is located in a state/region with a relatively weaker projected demand for teachers



Maintaining/Thriving revenue in an environment of fierce competition requires effective program differentiation :

- Institution is located in a state/region with a high number of providers of initial teacher preparation programs



- Consider the development of graduate-level online programs or accelerated “alternate” model programs that are attractive to career changers
- Emphasize opportunities for service learning and small class size (as relevant) to potential undergraduates
- Emphasize affordable cost and/or financial aid opportunities to potential students, particularly undergraduates who are considerably cost-conscious

- Institution is located in a state/region with a significant, growing number of “alternate” route providers



Your institution may be losing potential enrollments to “alternate” programs that may be more affordable and/or offer quicker entry into teaching. Develop direct competitor programs that leverage your strong brand/reputation:

- University-based “alternate” routes
- Incorporate online coursework at the graduate level.

Strategies for University Leaders' Consideration:

- **Institution relies heavily on enrollments from bachelor's level teacher education programs**



Enrollments in undergraduate programs are expected to decline.

- *Consider developing post-baccalaureate programs or other graduate-level programs that lead to initial teacher certification, including five-year M.A.T programs which have experienced limited growth in recent years.*

- **Institution's price point is relatively higher than other initial teacher certification options in the region/state**



Programs with higher price points will be hard-pressed to compete for enrollments. For future teachers, affordability is a critical factor in the decision to enroll.

- *Consider highlighting financial aid or work-study opportunities to potential undergraduate students*
- *Effectively differentiate your program based on quality, lower faculty-student ratio, service learning, accelerated coursework, or other areas that potential students will find value-add.*

The Bottom Line:

If you are experiencing reduced enrollments in initial teacher preparation programs, the situation will not resolve itself without action on your part and you can expect this trend to continue. If you are open to program revision or development, strategies exist for you to work to counter this trend.

The market for initial teacher preparation programs varies geographically. Commission a **state-specific analysis** to gain greater insight into the market in your region, and to gather recommendations specific to your institution.

Q&A and Discussion