President’s Advisory Council
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The Competitive Landscape Impacting Ramapo College:
Predictions, Market Factors, State Policy, Trends in Higher Education
“COVID-19 accelerated, but did not cause, many of the changes and disruptions higher education is likely to experience in 2021 and beyond.”

Marguerite Dennis
University World News, Jan. 2021
2021 and Beyond: Predictions for Higher Education

- Students will enroll in colleges and universities with well-established health protocols.
- Students will attend school year-round in some combination of online and in-person instruction.
  - Credit-bearing, gap year programmes will increase worldwide.
- Students will be admitted year-round and will be notified of admission decisions as soon as their applications are complete.
- An increasing proportion of higher education enrollments will come from company-sponsored, short-term certificate programmes and boot camps.
  - Vision planning will co-exist with and complement strategic planning.
- Higher education institutions will hire chief innovation officers charged with implementing vision plans.
  - Consumer behaviour will be incorporated into all future strategic plans.

2021 and Beyond: Predictions for Higher Education (continued)

• Transcripts will list competencies earned in courses along with grades.
  
• Students will graduate having done at least one internship.

• Antiquated higher education business models will be replaced with differential pricing structures.

• Virtual recruitment and admitted student events, as well as faculty and staff conferences, and faculty and staff meetings, will supplement in-person interactions.

• Some colleges and universities will cease operations. Others will merge with both national and international partners.

• International student mobility will become more localised, within regions and continents.

Figure 1. Slowing Growth in Number of U.S. High School Graduates, then Decline (U.S. Total High School Graduates)

- Strong production of high school graduates for two decades
- Graduation rate increases mitigate contracting youth population
- Birth declines still predict long-term graduate declines

Figure 2b. State-by-State Projected Percent Change from Class of 2019 to 2037, Grand Total of Public & Private Schools


Note: The percent change listed in each box represents the projected change in graduates from 2019 to 2037.
High School Graduates Profile for
Northeast

Projected values are displayed as either thicker or darker in the profile charts. See the notes for more details.

Total & Public High School Graduates, Class of 2008 to 2037

- Northeast total high school graduates are projected to peak in 2025 at 650,620 graduates
- Between the Class of 2018 and the Class of 2037, high school graduates are projected to average 620,120 per year
Projected values are displayed as either thicker or darker in the profile charts. See the notes for more details.

Total & Public High School Graduates, Class of 2008 to 2037

- New Jersey total high school graduates are projected to peak in 2025 at **119,620** graduates.
- Between the Class of 2018 and the Class of 2037, high school graduates are projected to average **112,930** per year.

First Fully Projected Year, Class of 2020
- Grand Total, Public & Private
- Public Schools Total
NJ regains #1 spot as #1 Net Exporter of College Students in the Country.

In Fall 2018:
-31,752 students left the state for College
-5,199 students came to NJ for College

Total: -26,373 net migration

COVID-19 and Enrollment Implications

- According to the National Student Clearinghouse, freshmen undergraduate enrollment declined 13.1 percent nationally in the fall of 2020, an “unprecedented” loss of 327,5000 students from the prior academic year.

- Undergraduate enrollment at NJ two year and four year colleges declined by 25,358 in fall 2020.
  - Community colleges the hardest hit with 13% decrease in enrollment
  - At NJ publics, largest decrease was in continuing students who took the Spring semester off

- “This year at the largest system of public higher education in the country — the State University of New York — our applications are down approximately 20 percent, one of the largest annual decreases in the System’s 73-year history” - Chancellor of SUNY, James Malatras

- Current announcements of “Returning to Normal” and “Back to College Life” and “almost 100% in person” from competitor colleges/universities
  - Students wanting to make decision based on hope for a return to normal.
  - Enrollment and Housing #s will correlate with in-person experience on campus (academics, student life activities, athletics)
State Policy: Outcomes Based Allocation (OBA) Funding

• OBA is a new State funding formula, established in FY ‘20 which distributed $35 million to State colleges and universities and reallocated a portion of the institutions’ operating appropriations.
• OBA funding to Ramapo is based on three factors:
  • The number of degrees a college awards in a year
  • The number of degrees awarded to underrepresented minority students
  • The number of low-income students enrolled in a college
• OBA seeks to incentivize campus diversity. It does not recognize time to degree, graduation or retention rates, or other measures that are critical to student success at Ramapo.
State Policy: Garden State Guarantee (GSG)

- GSG is a newly proposed program for FY ‘22 which would provide “free tuition” for two years to students whose income is < $65K and choose to attend a four-year public institution.

- GSG would enable a NJ student to attend a four-year degree program, at a public institution, using the GSG to pay for two years.

- GSG funding has been offered through an increase in the OBA but, as currently constituted, does not fully fund the program.

- GSG also requires a freeze of the four-year tuition rate for the student once enrolled at Ramapo. Known as cohort pricing, this exerts additional pressure on Ramapo’s resources and will exponentially increase the price of education for future students unless significant increases in State support are provided.
State Policy: Unfunded Mandates

Unfunded mandates require the College to find alternative sources of revenue, increase tuition, or continue to cut services and other expenses to cover costs.

- Ramapo College union contracts are negotiated by the State.
- Legislative programs, such as GSG, can come with costs that are not covered by funding.
- Procurement rules limit the College’s flexibility to generate savings on supply purchases and can increase time to get goods and services with lengthy processes.
- State mandates on programs and purchases do not come with the funds necessary to operate the programs—creating additional pressure on College resources.
State Policy: New Program Approvals

Changes in the State Approval Process for New Programs & More (P.L.2021, c.27 March 2021)

- The process will now include analysis of duplication with comparable programs of study in the State in addition to sufficient academic quality, evidence of labor market demand for the program, and whether the program will require significant additional State resources.
- Institutions are expected to collaborate with existing programs offered at other institutions unless there is compelling evidence that the proposed academic degree program is linked to the institutional mission or a specific area of institutional academic focus.
- Proposed new branch campuses must serve at least 100 students and offer the same proportion of courses taught by full-time faculty as the main campus.

Ramapo will have to quickly conceive, develop, and internally approve unique new programs with evidence of labor market demand.
Programmatic Trends in Higher Education

- **Shorter Time to Completion**: year-round/evening and weekend program models = 3-year UG degrees, 18-month or 1-year GR degrees

- **Scaffolding Structures**: “stackable” offerings = micro credentials, badges, mini (or micro) Master’s programs; often offered off-campus

- **Closing the Skills Gap/Developing the Workforce**: enterprise training companies work directly with employers

- **Increase in Competency-Based Education (CBE)**: students complete skills & competencies at their own pace; these skills & competencies appear on the transcripts
Programmatic Trends in Higher Education (continued)

• **Hybrid Learning Will Stay**: convenient; compromise between in-person & online.

• **Demand for Online Education**: continued increase in Massive Open Online Courses (MOOCs) & Online Program Manager (OPM)-delivered programs.

A number of these programmatic trends have Middle States accreditation implications.
Preparing for and Adjusting to the Competitive and Shifting Landscape

We must all be willing to:
- Recommit to our mission.
- Do what we do differently.
- Learn new skills.
- Work together even when we disagree.
IN LIGHT OF THESE MARKET FACTORS, POLICIES, AND TRENDS:

How might you do what you do differently?
How will you support our students?
What new skills are you learning?
How are you preparing/responding to these factors?
How will you foster progress in the face of disagreement?
What initiative will you take?