Foreword

When someone confidently tells you they know what lies ahead, hold □on to your wallet. Odds are they're trying to sell you something.

Predicting the future is a dangerous business; my white beard is testament to how many failed projections about higher education I've witnessed. But *understanding the present* to be prepared for whatever future(s) might lie ahead is essential. It's in that spirit that I accepted Brent Ruben's invitation five years ago to produce a SWOT (strengths, weaknesses, opportunities and threats) analysis of higher education as the foreword to the original edition of his edited work *A Guide for Leaders in Higher Education* (Ruben, et al, 2017) – and to update the analysis for this new book on implementing sustainable change in higher education, with the COVID-19 pandemic at least partially in the rearview mirror.

It's stunning how much has changed in the five years since that first analysis appeared: as abrupt a transition in the presidency as we've endured in my lifetime, from Obama to Trump back to Biden; a national reckoning with racial justice and inequity in the wake of the killings of George Floyd, Breonna Taylor and other Black Americans; and a global pandemic that unfurled the worst national economic crisis since the Great Depression, to name only the most significant.

Those external shocks have undoubtedly affected the postsecondary education and training ecosystem (I prefer that slightly unwieldy term to the more graceful, but inaccurate, "higher education system," as I argue below that our collection of colleges, universities and other educational providers isn't a system in structure or behavior). It's too early to say for sure

exactly how (and how much) things have changed, because the specter of COVID-19 still looms and the world remains highly volatile.

But to be prepared to do the hard work Brent Ruben asks them to do in this volume -- identifying a vision for their institution, program or department -- today's (and tomorrow's) higher education leaders must both understand the context in which they are operating and get comfortable with the reality that change is both inevitable and necessary. By interpreting the current postsecondary landscape, this analysis is designed to level-set them for the journey laid out for them in *Implementing Sustainable Change in Higher Education.*

Two major caveats: A single, common analysis of the thousands of colleges and universities in the United States is inevitably too broad. A rural community college and an urban private research university have very different contexts and therefore differing strengths, weaknesses, opportunities, and threats. But ideally this framework can serve as a jumping-off point others might adapt to look at specific sectors or groups of institutions.

Second, this is a snapshot of a moment in time, and as all of us learned in March 2020, circumstances around us can shift dramatically almost overnight. So this is a fluid document, designed to be constantly refreshed.

That's what this 2.0 version of the analysis strives to do: refresh my views on the state of higher education made for Brent's earlier volume (Ruben, et al, 2017) in the wake of the seismic shifts that have occurred in our world, and arm those of you charged with leadership in higher education with one person's view of the world around you.

Strengths

American higher education remains a rich, vibrant enterprise. Its collective colleges and universities attract and educate many millions of students from the U.S. and around the globe, produce much of the world's knowledge through research, and play vital roles in their communities and regions. Here are its strengths.

History of Excellence

American's colleges and universities collectively have long been viewed as the world's best. While more than a dozen countries now educate larger proportions of their citizenry than the U.S. does, American institutions still dominate world rankings and remain a destination for many of the world's best students and scholars.

Democratization

Higher education in the United States was ahead of most of the rest of the world in embracing the idea that educating a large proportion of the population was good for individuals and society alike. Postsecondary education was seen as a ladder to the middle class, and that possibility helped earn public support and significant government investment in institutions and students. A "but" here: Larger-than-desirable gaps remain in access to higher education for some racial, socioeconomic and other groups, and the pandemic and recession set back what had been recent progress in closing them.

Differentiation

American higher education is an incredibly diverse constellation of institutions: purely vocational schools offering certificates and associate degrees, small residential colleges focused on undergraduate learning, major universities with extensive graduate programs and billion-dollar research portfolios—and everything in between. While the industry is often characterized as slow-changing if not stagnant, a view challenged by the rapid pivot during the COVID-19

crisis, the postsecondary enterprise has in fact adapted to meet the needs of an enormous variety of learners. It's a fair question whether the adaptation has been *sufficient,* but caricatures of U.S. higher education as inert are unfair.

Relative Independence

Colleges and universities in the United States are subject to relatively little government control compared to their counterparts in other countries. The U.S. federal government asserts limited authority over colleges and universities; states vary in how much oversight and governance they impose on the institutions they help finance. These conditions have helped create an ecosystem that encourages competition and innovation, which are widely viewed as contributing to the sector's historical excellence. (Many college leaders balk at this part of the analysis. Many consider themselves to be highly regulated, and governments are indeed applying more scrutiny to higher education now than ever before, due to increased questioning of the return on investment from government and public spending on higher education.)

Tradition of Liberal Education

The liberal arts and sciences disciplines are in decline (as they have been on and off for decades), as job-seeking students flock to majors that "return on investment" calculators show to pay better in the years immediately after college. And in today's fractious, highly politicized world, some experts have gone so far as to suggest we call the liberal arts something else to steer clear of the weaponized use of the term "liberal." But the American tradition of undergirding even professional disciplines with a core of general education is increasingly being mimicked around the world. Momentary consternation aside, it remains a distinguishing element of American higher education.

Universities as Knowledge Producers and Economic Engines

America's network of private research universities and public flagship and land-grant institutions produces a significant portion of the country's intellectual property, fueling scientific advancement, human understanding, and commercial enterprise. This role as developers of ideas as well as products has made them essential not just economically but socially and civically.

Colleges as Community Anchors

The vast number of colleges and universities in the United States means that many American metropolitan areas, cities, towns—even hamlets—have their own institution. The institutions are leading employers, drivers of economic activity, and cultural and arts providers, among other roles. And no other strength on this list has been more reinforced by the pandemic: colleges and universities played an outsized role in helping their communities through the crisis, testing and vaccinating residents, developing medical treatments and cures, analyzing wastewater, and generally proving themselves indispensable.

Weaknesses

Higher education's historical strengths have endeared it to the American public and brought it unparalleled levels of government and philanthropic support. But in an era in which Americans increasingly question our institutions, colleges and universities are not immune, and the cracks are showing.

Unaffordability, Real and Perceived

The public conversation about higher education continues to be dominated by several data points, most notably $1.7 trillion in student debt and sticker prices that have doubled over two decades, with some at the higher end approaching $80,000 a year. The reality is that the average net price (what students pay after financial aid) of a public four-year college in the United States is about $15,000, and nearly half of Americans start out at a community college,

where the price is under $9,000. But the concerns about affordability, combined with escalating questions about the return on investment (see threats below), have created a situation in which it is credible to argue that many Americans have been priced out of higher education.

Labor-intensiveness

Colleges and universities don't raise their prices for no reason; their own costs have risen quite a bit faster than inflation in recent decades, in large part because employee costs make up as much as three-fourths of their operating expenditures. While much of the perceived cost problem in higher education is blamed on the professoriate, most of the recent growth in employee numbers has come on the administrative side of the house, driven, college leaders say, by growing student demand for student services and increased government regulation. The 2020 pandemic and ensuring recession saw colleges reduce their employee bases (and freeze or cut pay or benefits), and it isn't yet clear whether and how much those will recover.

Complacency and Resistance to Change

In a matter of days in March 2020, American colleges and universities performed a feat many would not have thought possible: They found a way to keep educating learners, caring for their employees, and functioning despite having closed their campuses amid a global pandemic. That seemed remarkable for an industry widely derided as having changed little in 100 years. Yes and no: as argued earlier, colleges and universities aren't (quite) as hidebound as they're caricatured to be. But it's also true that institutions and the people who run them often change only when they have to, and in this situation, colleges and universities had little choice but to adapt if they wished to survive. The list of weaknesses and threats remains long: when not in crisis, will colleges and their leaders make the requisite changes?

Lack of Measurement / Evidence of Performance

We are in an era of evidence, with governments, advocacy groups and others asking hard questions and in some cases demanding proof that colleges and universities are living up to their promises and commitments. Institutions collectively have been slow and ineffectual in their response: They are decentralized, they haven't historically been held accountable in this way (and bristle at it), and much of what they do is difficult to measure, particularly in terms of gauging what and how much students learn. In that vacuum, governments and others have produced their own data (such as information on what graduates of individual college programs spend for their degrees and ultimately earn) that define the terms of public discussion and frequently put higher education on the defensive.

Decentralization

As described earlier, higher education is a loose constellation of thousands of largely independent institutions. Most states have structures that organize (if not unify) their public colleges and universities, but little to no formal organizing structure exists at the national level (like those in many countries with ministries that govern institutions). That's why I call it an ecosystem at best, not a system. And the lack of organization and coherence makes systemic change difficult if not impossible. Even good ideas and best practices can be difficult to spread across institutions. This arrangement favors competition over cooperation, restricting collaboration at a time when few institutions can afford to be islands unto themselves.

The lack of systemic structure also means that institutional interests (real or perceived) generally trump public interests. Existing reward structures, such as institutional rankings, may encourage colleges and universities in certain directions—toward greater admissions selectivity or prestige-rich research programs—when public policy considerations might favor a focus on better undergraduate teaching or admitting a larger percentage of disadvantaged learners.

Mission Complexity / Conflict

Almost all colleges have multiple missions, which often overlap but sometimes collide. Research, teaching and public service are the fundamental goals of major universities; community colleges have a split focus on job training and preparing students to transfer to four-year institutions. Read any institution's strategic plan, and you're likely to see a laundry list of priorities and can seem too complex and conflicted for their own good.

The reality that colleges and universities are better rewarded for some missions than for others—by college rankings, state funding regimes, public perception, or other sorting mechanisms—creates a situation in which missions that might be most in the public interest, such as providing the greatest access to underrepresented students or the best possible undergraduate teaching, may get crowded out or deemphasized if institutional interests are better served by focusing elsewhere.

Opportunities

The Need for Skills

The previous iteration of this analysis described an emerging consensus among employers, government officials, and others that to meet the workforce and other needs of the U.S. economy and remain globally competitive, a greater share of the American population requires post-high school education or training. This alignment created rhetorical support for (and spurred some increased financial investment in) higher education institutions, especially those seen as doing a good job preparing learners for work.

Today, the broad outline of that consensus remains, but with a twist. Many still argue that college and university credentials remain the best way to give Americans the skills they need to

enter or remain in the workforce, and that push strengthens the demand for higher education. But the questions about affordability and the sense that many underrepresented learners don't thrive in college, together with the emergence of more alternative providers of education and training (see threats below), will force traditional postsecondary institutions to compete to be the providers consumers and governments choose to meet this pressing need.

Global Democratization of Higher Education

The United States has benefited enormously since the early 2000s from the fact that more countries—especially in Asia, the Middle East, and South America—want more of their citizens to have a postsecondary education. Because demand in many such places significantly outstrips local supply, American institutions have remained attractive destinations for many foreign students who have the academic and (at least as importantly) financial wherewithal to come to the United States. The inflow of international students to the U.S. has helped sustain enrollments in undergraduate and graduate programs alike, buttressing institutional budgets amid declines in other student populations.

The last five years have threatened this opportunity, between the double whammy of the Trump administration's restrictive immigration policies and rhetoric and the worldwide travel standstill wrought by COVID-19. International enrollments are poised to recover now, as the pandemic becomes endemic and a Democratic administration opens U.S. borders – but the winds can change quickly, as we've learned, and the 2024 election looms.

Innovation and Technology

Technology has been slowly transforming higher education and the college experience for years – too quickly for many traditionalists and not fast enough for those who (for good reasons and bad) believe the industry has lagged just about every other. From back-office

functions to online learning, though, hardly any aspect of higher education had gone untouched by technological change by the start of this decade.

Then, the pandemic hit, and the aforementioned pivot to virtual campuses unfolded. Those colleges and universities that were further along the path to digital transformation undoubtedly fared better than their peers, but even laggards accelerated their adoption of new systems, tools, and processes that enabled students to continue their educations, employees to keep doing their jobs – and their doors to stay open.

As of this writing, most campuses have reopened, and many are rushing to return to some semblance of "normal." Fault lines remain between the Silicon Valley entrepreneurs and campus CIOs who believe online degrees and shared digital services can increase the number of students colleges serve and streamline operations, and professors who fear such "efficiency" gains will surely come at the price of quality, and possibly their jobs.

But a growing middle ground recognizes the need for higher education institutions to more fully embrace the digital age, creating the opportunity to widen colleges' reach to students who are constrained by place or time, among other upsides.

Threats

The current environment offers opportunities for institutions with the vision to recognize these opportunities and the strategy to capitalize on them. Similarly, potential peril awaits those that fail to appreciate the emergent threats.

Changing Demographics, Declining Enrollments

Most states (and the United States as a whole) are facing a decline (or flattening, depending on the region) in the number of traditional college-age residents, beginning in the

middle of this decade. This trend will further intensify competition among the many enrollment-dependent colleges that still rely mainly on 18- to 22-year-old undergraduates, one of several factors putting downward pressure on their revenue.

Many colleges will not approach that demographic "cliff" from a position of strength. The pandemic and recession helped drive postsecondary enrollments down by nearly a million students from fall 2019 to fall 2021, with the losses coming disproportionally from students historically underrepresented in higher education, including students of color, those from low-income backgrounds, and working adults.

As the number of traditional high-school-age students declines, pressure will grow on colleges and universities to recruit and graduate more students from groups that have historically been underrepresented in higher education. That will require institutions not only to change how and where they recruit students, but to ensure that their academic offerings, student supports and other systems are designed to serve those students and meet their distinct needs.

The Political Divide

For a long time, higher education was a comparatively nonpartisan issue. But that no longer seems true in an era in which partisanship rules.

The good news for colleges is that on the whole, growing critiques of higher education—especially from conservatives—haven't significantly diminished state or federal funding. Even with Republicans controlling the White House and Congress throughout much of the Trump administration, federal support for colleges and students did not meaningfully suffer. (The federal recovery funds approved by Congress throughout the pandemic directed significant funds to colleges and students.) While funding for public colleges in many states has failed to keep up

with enrollments, and some right-leaning states have been particularly penurious, most analysts attribute any reductions in state support more to general anti-tax sentiment and to greater competition for funds than to partisan punishment of colleges for perceived missteps.

Partisan politics does pose an escalating threat to higher education, though. It's most visible now in legislation to restrict discussion of race and other social issues in the curriculum, to limit faculty tenure, and to regulate campus speech. Republicans are pushing those measures in response to their concerns that colleges are squelching conservative viewpoints and promoting liberal orthodoxies. Republicans aren't the only people concerned, though: many advocates for free expression fear that today's students lack appreciation for the historical role the First Amendment has played in guarding the rights of the minority points of view in society, and are too willing to shut down one of today's campus minorities (conservatives).

Doubts About Value

Another set of emerging questions about higher education are nonpartisan. Already brewing concerns about rising tuitions and student debt levels exploded after the 2008 recession amid the perception that it led to many recent graduates living in their parents' basements or working as baristas at Starbucks.

Let there be no mistake: Data show that getting a college degree continues to pay off for the average American (and not just for engineers and computer scientists).

But data initially demanded by the Obama administration and first released by the Trump administration show what students spend on and earn after graduating from individual programs at every college, and they reveal enormous variation by institution and major. Some Republican

politicians cite the data to question the liberal arts; consumer advocates and Democrats use them to castigate for-profit colleges.

Perhaps a greater threat, however, come not from federal policy makers but from the doubts of parents and students themselves, who with increasing frequency seem to be asking not just which college they should attend but whether they should go at all.

The bottom line: Doubt is growing about the value that colleges provide to their students and to society.

More Accountability

Pick your issue: Core matters such as affordability, faculty tenure, access to higher education. Partisan issues such as free speech or affirmative action. Social issues such as campus sexual assault. The increased willingness of politicians to intervene on a wide range of matters they have historically left to campus officials suggests that colleges clearly have been knocked off the pedestal on which they perched comfortably for decades.

Alternatives

Not too long ago, increased doubts about higher education wouldn't have been too terribly threatening; the primary alternative to going to college was to get a job. But just as technology can stimulate innovation within existing colleges and universities to their benefit (see the opportunities section earlier), technology has also opened the door to competition to challenge the established players. Industry after industry, from journalism to music to health care, has been disrupted in recent decades, and in higher education the biggest threat comes from potential alternative providers that might be able to make training available more affordably, faster, or in forms that may be more flexible and adaptable than current course structures and degree programs.

Influential foundations and Silicon Valley investors are pouring money into new providers and the creation of pathways to other credentials that could undercut the traditional stranglehold that colleges and universities have had on postsecondary education and training. Technology has helped lower the barriers to entry, in ways that have threatened other sectors. Prognosticators seeking to sell books or their products often overstate this threat, but it is real.

The Changing Higher Education Workforce

It's too early to know for sure, but the last two years appear to have dramatically changed our collective relationship with work and traditional concepts of where it is performed, and the college and university employee base is not immune from that tumult.

Workforce experts use different terms to describe what we're seeing now: The Great Resignation. Burnout. Demoralization. Employees are leaving their jobs in droves, while others are rethinking how much they want to work and *where* they want to do that work. Some of the upheaval surely relates to record unemployment that is unlikely to be sustained. But assuming that a more fundamental (and permanent) reassessment of the role of work is under way, college leaders face some special challenges because of unique aspects of the higher education workplace.

Colleges and universities, like many nonprofit organizations, have historically paid their workers less than most corporations because they typically offered a more flexible (and less-pressured) work environment and benefits such as free or reduced tuition. Many of those advantages have eroded, as has the attractive perception that colleges are particularly mission-oriented employers.

The instructional workforce poses unique problems. Over the last quarter century, the proportion of instructors working in the tenure system has eroded from about three quarters to roughly a fourth, and that trend is unlikely to be reversed. Colleges and universities, like employers in other industries, have increasingly embraced a "contingent" model, bringing contract workers and part-time adjuncts into the mix. Most lack health insurance and other benefits, and many struggle financially. Professors' trust in administrators and trustees is waning, and many feel unempowered.

More than many other employers, many colleges cling to an in-person model, and while some are experimenting with allowing more employees to work remotely, many consider remote work to be impossible (or at least highly undesirable) for front-line campus workers, and others want to maximize face-to-face instruction both to keep residential students on campus and because they believe it is of higher quality.

This is an emergent issue that is just beginning to play out.

Conclusion

What do I hope you take away from this analysis as you prepare to read Brent Ruben's book on leadership?

This is a difficult time to be a leader in higher education. Colleges and universities are under pressure on a wide range of fronts: Many face enrollment and financial challenges. Politicians, employers and the public are asking harder questions about their value than ever before. Students expect more – more amenities, more flexibility, more support – yet bristle at the idea it might cost more. Significant employee turnover, including at the highest levels, where the average tenure of a president continues to shrink.

Yet the institutions remain hugely important, to their students, staffs, communities, states and regions, and a wide range of opportunities are present for those motivated to pursue them. To thrive, they need leaders who understand not only the organizations they serve but the environment in which those institutions are operating, and equally importantly their own motivation for working to address some of the many challenges confronting colleges and universities of all sizes and types. Understanding that context can help leaders not only navigate the now, but also peek around the next corner and craft an energizing vision for their own future and that of the academy. This book provides indispensable guidance for those who are now – or envision themselves in the future – helping these all-important institutions navigate an uncertain future.

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