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The State of
– and the Future for –
Postsecondary Career Education

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Two stories help frame the State of Postsecondary Career Education today. The stories speak to both the challenges within the sector and the most effective way to frame/define the sector as we move forward.

When I was given the honor of leading the Association of Private Sector Colleges and Universities (APSCU) in January of 2011, I began – as most national association CEOs do – by traveling the country to provide updates on the news from our nation's capital impacting our sector. As everyone following higher education in America knows, we've never faced an administration with such ideological hostility to the very existence of the private sector in education. Facing such challenges on many different fronts, those inviting me to speak soon changed their requests, asking me not to discuss government relations but rather to focus my remarks on what I saw as the future of our sector. In a few months even these futuristic presentations were not sufficient. In the spring of 2015, meeting hosts, literally, requested that I provide pep talks to the staff attending many of our state associations' meetings as they – teachers, student service professionals, and other school administrators – simply could not understand why their good work in the delivery of education was being questioned.

A second story is equally important. Late in the spring of 2015 I was invited to speak at the Kansas-Missouri joint state meeting. One of our sector's most respected education leaders, Tim Foster, and I were having a dinner conversation the night before this event. As the evening progressed he shared with me how a student's experience at our schools endures three different stages.

He said, "Most college students enroll simply because it seems the right thing to do. Their mind tells them that if everyone else is going to college, then they should go to college too! But, this commitment to join friends in a college classroom doesn't last very long. Soon, they have one simple goal; complete the course, get the degree, and move into the workforce. Yet, even this commitment to completion doesn't sustain them through the weeks – or even months – of a postsecondary career academic program."

Tim continued, "In the end, what really drives our students and our teachers is their focus on a career! The teachers in our schools are motivational instructors because they can share their stories of how their careers touched people in ways never imagined. And the students are motivated towards completion for one simple, basic – but overwhelming – reason. They want to pursue their chosen career!"

To understand where our sector is today, we must understand our recent past. In one of Shakespeare's many plays, a character by the name of Antonio created the famous words, "What's past is prologue." Quite simply, the recession's impact on our sector combined with the ideological hostility to our sector by the current administration in Washington have defined our present in ways few, if any, ever thought possible. But when one combines a look at our sector's history with a similar look at the emerging skill demands – and the projected growth in college enrollment – we can look to the future with a sense of optimism.

Of course, the immediate past defines some of the economic challenges of present day. First, the sector grew too fast and too much when we admitted every applicant seeking additional education and skills in the midst of a recession. When too many of these students – not academically nor personally ready for the rigors of college – dropped out of school, they defined a new era of negative public relations of our sector. We were labeled by the drop outs and the loan defaults rather than by the majority of students who successfully completed their studies to pursue their chosen careers. One California businessman, not associated with our sector, told me on one trip that in any other political time, the completion rates and placements rates of very high risk students in a recession-based economy would have been recognized by government leaders as incredible achievements.

This same recession assaulted our sector in a second way when middle-skills jobs didn't recover in ways similar to those highly-skilled workers on the top of the economic ladder and those unskilled, low-wage workers on the bottom. While we were properly preparing graduates for post-recession jobs, many of these jobs simply never developed. Anthony Carnevale and The Georgetown Center for Education and the Workforce published two different reports in 2015 showcasing the lack of a middle-skills job recovery. Without a demand for jobs at the end of one's studies many potential students chose not to invest in further education until such time as the jobs using new skills returned.

The most recent attacks by this administration on the sector have focused on many schools' advertised placement rates. While no one encourages or accepts false information, in many cases the placement projections may have been historically accurate for either normal economies, or normal post-recession recoveries. But the economy today simply hasn't matched those historic trends. We will look at the specific data confirming the lack of economic growth later in this paper. For now, it is important to know that in the six years following the recession, America's GDP has averaged only a 3.9% growth which is the lowest ever recessionary recovery. Compare this with China's average growth of 8.1% during these same six years.

2015 ended for this sector as we learned that the President had committed to vetoing the entire 2016 Omnibus Appropriations Bill if language remained in the bill delaying the implementation of the Gainful Employment regulation. Early in 2016, we have witnessed a new round of regulatory attacks on the sector – including a new round of rule-making and more specific charges by different agencies against specific school. All of this, unfortunately, makes clear this administration's hostility to the sector's very existence is likely to continue through the completion of their term in office. These policy fights, and our failure to stop the administration's attacks exclusively focused on our sector, will certainly impact access and opportunity for many students. We don't yet know the real magnitude of such impact. But we enter the new year with caution because the Department of Education has boasted the new Gainful Employment regulation will eliminate 14 percent of the programs in our sector. Maybe. Maybe not. We will learn more of the rule's potential impact in late spring/early summer when the first round of debt/earnings rates are published for each program. We do know that the entire Gainful Employment metric is based on calculating the incomes of students entering the market during the peak of the recession, making their entry-level wages even more challenging.

The day after the Omnibus Appropriations Bill failed to include a delay in the Gainful Employment regulation, the owners of perhaps the nation's best known culinary school, Cordon Bleu, announced the closing of all such schools over the next two years. No one can look to the current state, and the potential future, of the sector without acknowledging the incredible hostility towards the sector that exists within the Administration and the Department of Education. More than one career college leader has said the only strategy today can be one of survival against the ideological attacks leveled at our sector by the current Administration.

Yet despite such caution, this paper will articulate a growing demand for postsecondary career education. A closer look at all the studies – including many from the government - define a path forward that enables most schools to survive and thrive in today's political environment simply by serving the growing demand for the academic programs and skills we provide. While the immediate past may be prologue to current times, a more careful look at both the longer history and the projected demands for future skills provide reasons to believe that growth will occur, again.

2009 to 2014: Trends Defining a Return to our Roots

Statistics – past and present – define a sector positioned for the future simply because demographics and job growth will create such a demand for the sector's academic programs. But one thing has changed – and this is critically important in projecting the future. We are no longer the sector we used to be.

Postsecondary career education exists today in many different types of schools with different public/private corporate structures. They range from public 2-year and 4-year colleges, a strong private non-profit sector of schools, and for-profit enterprises. Traditional private sector (for-profit) education was once defined as almost exclusively focused on career education. Today, especially with the emergence of larger publicly-traded schools, some private sector colleges have diversified their academic portfolios to include, or even focus on, the more traditional liberal arts education primarily through on-line offerings.

For many generations career education occurred within a given community through two types of schools. First, family-owned career college/university provided a combination of academics and career skills relevant to that community's workplace needs. Second in each state, a system of community colleges often focused on similar occupational education. In recent years two forces are changing the landscape of career education. Today, many community colleges are focusing more of their programs on liberal arts education as a feeder system to 4-year BA programs. This trend has probably accelerated with the President's call for free community college as the initial step to obtain 4-year liberal arts degrees. At the same time, postsecondary career education has expanded beyond family-owned schools to include private sector investors skilled in the design and delivery of career education; a small number of publicly-traded companies; some public institutions – especially certain community colleges still focused on job training – and a growing number of non-profit career colleges. Today, no one corporate structure defines or owns postsecondary career education. And today, some historical providers of postsecondary career education may no longer make career education a primary focus of their academic programs.

There are multiple debates about what form of corporate structure is most appropriate. That debate is for a different place by a different author. Unfortunately, no data exists to easily identify those schools engaged primarily/exclusively in postsecondary career education. In the past we assumed that all private-sector schools were career schools. That is no longer true. But until we can find data that would include schools by academic mission rather than corporate structure, many of the numbers used in this report will have to look at the entire private sector of higher education as the best possible source for data.

We are left to our own analysis and conclusions as to what these numbers might mean for the future. Personally, I believe postsecondary career education – usually delivered through a combination of on-line and site-based programming at institutions of different corporate structures – is positioned for slower, steady but positive growth. Most career programs need some level of on-site/blended laboratory experience, mentoring and student services. This sector continues to be dominated by private sector investment in the delivery of such education. But, postsecondary career education is not the exclusive domain of any school corporate structure today.

In the past four years there have been enrollment declines in many of the postsecondary career schools, including programs of different lengths and subjects. Such enrollment declines reflect both an adjustment following the spiked growth of the recession and the impact of the impending Gainful Employment regulation on this sector. The Department of Education's projection that 14 percent of all career programs will be eliminated by their Gainful Employment regulation, combined with now years of negative attacks, can explain some of the enrollment decreases in the for-profit sector. But the community college system, with strong support from the current Administration, has also seen enrollment declines. Thus, some portion of the enrollment decline must be attributed to the recession's lack of recovery/demand for middle-skill jobs; and a similar recognition by potential students not to invest in an education when the jobs they seek don't exist. The current instability of the stock market and the current uncertainty of the Gainful Employment regulation's impact make it impossible to offer sound projections for the immediate future enrollment trends.

Yet a look back at the past five years is a sound basis for our current analysis. Enrollment at private sector colleges and universities over the past five academic years shows the trends:

Year	Enrollment
• 2009/10:	3,780,565
• 2010/11:	3,982,462
• 2011/12:	3,761,878
• 2012/13:	3,446,239
• 2013/14:	3,217,978

Enrollment spiked during and immediately following the recession. The slow jobs recovery combined with the policy attacks on the sector have impacted the reduction in total enrollments.

But when one removes the unprecedented spike following the recession and looks at longer-term cycles there is a more stable trajectory of growth. In the 2002/03 academic year this sector enrolled 1,301,398 students. Five years later in 2007/08 the sector had doubled to 2,643,540. Five years later, in 2012/13, the sector served 3,446,239 students. This could be seen as a drop in the total number of students from the 4 million peak of the recession. Or it could be seen as a steady growth since 2002/03 and 2007/08.

Even if one takes the most recent enrollment of 3,217,978 you will see a 600,000 growth since 2007/08. So the obvious question is: Are we a sector that grew by 600,000 since 2007/08; or are we a sector defined by a decrease of 500,000 since the peak of the recession?

But there is a much bigger story to tell!

This sector grew under the premise of access, opportunity and open enrollment! That philosophy worked until the recession's dramatic growth. Voices both inside and outside the sector began calling for a greater focus on outcomes because access without outcomes results in debt without degrees. Certainly since 2012 when the negative impact of poor outcomes began to define the sector's work, there has been an intense focus on outcomes. The rewards of this focus really tell the story of how this sector is very different today than when the Obama Administration began their ideological assault. Today's numbers show that enrollment is down 562,587 since 2009/10. But today's numbers also show that total academic awards have increased 20,877 during this same five-year comparison.

The Sector has Changed!

The most important message of this paper is that the sector and "The State of the Sector" today is much different than the one targeted by the Obama Administration. This is shown by more than just the increase in outcomes (academic awards). Similar changes are revealed in the declines in use of Title IV funds; the reduction in tuition and fees; and the significant reduction in cohort default rates. The only thing that has not changed is the sector's continued focus on serving those most in need of additional access and opportunity – today's "New Traditional" college students.

Sector Revenues

The easiest way to tell this story is through the numbers. The chart below makes clear that the sector has seen a $12 billion reduction in the total Title IV funds received. As a result, the percentage of all Title IV funds used by this sector has seen a similar reduction of 6.7 percent.

Year	Revenues	Title IV Funds	% of all Title IV Funding
2010	$29.6B	$32.6B	23%
2011	$33.8B	$28.4B	20.3%
2012	$32.3B	$25.8B	19.3%
2013	$29.7B	$23.8B	17.7%
2014	$27.3B	$20.3B	16.3%

Tuition and Fees:

Tuition and fees have also decreased over the most recent two academic years. During the peak of the recession, over 90 percent of those students enrolled in private sector career colleges were eligible for Title IV funding support. Today, there are fewer students enrolled in the sector, and even decreases in the number of students using federal financial aid. But, as we move away from the recession, it is this sector which shows an actual decrease in costs. (One can only wonder how much lower the costs would fall if the government eliminated the 90/10 rule which results in schools charging higher tuition/fees as a way to complying with the regulation while serving a student body almost exclusively dependent upon Title IV funds for access.)

Tuition and Fees Costs: the 2014/15 Academic year versus 2012/13:

- 4-year public (in-state) +2.8%
- 2-year public +3.9%
- 4-year private non-profit +3%
- 2-year private non-profit +2%
- 4-year private for-profit -2.4%
- 2-year private for-profit -1.2%

Cohort Default Rates

Cohort default rates will always be a challenge for postsecondary career education simply because of the demographics of the students most often engaged in these programs. The students are low-income. They are often independent, with many having children. As mentioned above, over 90 percent of the students enrolled in private sector career colleges were eligible for federal financial aid during the peak of the recession. While that number has gone down, the most current data shows that 65 percent of the students in 2014 received Pell Grants, suggesting an even higher percentage accessing federal student loans. But the important point, reflecting the change in this sector, is the sector's focus on repayment of loans. In 2010, the proprietary sector registered 21 percent default rates for 2-year programs and 22 percent default rates for 4-year programs. The only other sector of higher education with similar rates was the 2-year public programs with a 21 percent default rate.

Making progress in reducing these rates is not easy when confronted with a middle-skills jobless recovery. That is evidenced by the fact that 2-year public schools (community colleges) still have a 19 percent default rate. But the private sector schools have reduced their rates to 14.7 percent for 4-year programs and 17.7 percent for 2-year programs; a reduction of 7.4 percent and 3.7 percent respectively. Such reductions are by far the highest reductions of any sector.

In summary, the data makes clear the sector has changed! Everything is down, except academic awards!

Between 2010 and 2014:

- Total Sector Enrollment: Down 572,587 students
- Tuition and Fees: Down 1.2 to 2.4%*
- Total Sector Revenues: Down $2.3 Billion
- Title IV Financial Aid: Down $12.3 Billion
- Sector's % of all Title IV Funds: Down 6.7%
- Default rates: Down 3.7% to 7.4%*
- Academic Awards: UP 20,877!

(Asterisk references the difference in 2 and 4 year programs.)

Achieving Change in a Challenging Economy:

The outcomes reflected in 2014 are remarkable in and of themselves when one considers the demographics of the students served in this sector. But the numbers become even more significant when achieved in the middle-skills jobless recovery.

The Georgetown Center for Education and the Workforce has long provided some of the most independent, in-depth analysis of education's relation to the American workforce. Two reports in 2015 speak of the unique challenge faced by workers with middle-skills. In the summer of 2015, a report titled "Good Jobs are Back" first confirmed the challenge, writing, "The downside of this recovery is that middle-wage jobs have not fully recovered: In spite of the 1.9 million jobs added in the recovery, middle-wage jobs remain 900,000 jobs below their re-recession employment level."

A second report from the same institution in December of 2015 expanded on this challenge. The report, "Six Million Missing Jobs," looked at the number of jobs that should have existed in each sector of the economy. Their study shows that "there are still 2 million fewer jobs for workers with some college or an Associate's degree than there would have been if the recession had not occurred."

In the administration's ideological attack on the sector, they have charged multiple schools with misrepresentation of placement rates. Based upon a review of the economic data, many of these schools may have actually made correct projections based upon traditional economic growth rates/recoveries. Unfortunately the recent recovery has not produced similar outcomes for middle-skill jobs.

To have some appreciation for this challenge, one should look at America's Gross Domestic Product (annual economic growth) before and after the current recession. In the five years prior to the recession (2003 to 2007) the average GDP was 5.74 percent. After two difficult years of recession in 2008 and 2009, the following five years (2010 to 2015) the average GDP was only 3.9 percent. Such rates of growth are simply insufficient to build a new middle class in America. And to give you an international comparison, during the same period of 2010 to 2015, the annual GDP in China averaged 8.1 percent. This has been described as a major slowdown in their economy!

Looking Forward: Demographics, Demand, Determination and Degrees

The Obama Administration deserves credit for their efforts to inspire low-income, first-generation college students to pursue the best liberal arts studies at some of the nation's most prestigious schools. The Lumina Foundation, and others, deserve similar credit for their campaign "Goal 2025" to achieve 60 percent of Americans holding some postsecondary award (certificate to degree) by 2025. The Foundation's work recognizes that we need postsecondary awards at all levels of the higher education spectrum, and that many of these awards leading to good jobs do not require a full BA Degree.

In 1973, 28 percent of all jobs required a postsecondary degree. By 2020, projections from multiple sources show that 65 percent of all jobs will require some postsecondary credential/award. In the most recent update on the Lumina Campaign, with 10 years remaining, current data shows that 48% of Americans (ages 25 – 64) have a high school degree but no postsecondary award. This half of the American population must be the target of our work in preparing America's future workforce.

Demographics

The two sectors serving the population with the greatest opportunity for progress are the postsecondary career colleges and the 2-year public colleges. These two sectors serve this "New Traditional" population, often pursuing college for the first time in their family's history. According to the National Center for Education Statistics, a demographic description of private sector school enrollment shows that:

- 65% Women
- 25% African-American
- 17% Hispanic
- 67% Age 24 and older
- 35% Age 35 and older
- 80% Financially Independent
- 65% receive Pell Grants
- 50% have children
- 35% employed full-time, in addition to school.

Demand

The Georgetown Center on Education and the Workforce projects 55 million job openings by 2025. They project that 31 million of these 55 million jobs are due to retirements while the remaining 24 million represent net new jobs. Equally important, they project that 65percent of the replacement jobs and 85 percent of the net new jobs will require some level of postsecondary education awards.

We (APSCU) began in late 2015 an initiative highlighting those occupations where emerging demand – and in some cases projected shortages – suggest a real need for more trained, skilled workers. We call the initiative "SOS: Shortage of Skills." I mention this here because we have used Bureau of Labor Statistics' projections on future jobs and job skills. Yet, the Georgetown Center's report "Recovery: Job Growth and Education requirements through 2020" challenges the BLS numbers as being too conservative. They point out that BLS reported only 31 percent of jobs in 2010 required some level of postsecondary education while both the American Community Survey and the Current Population Survey of the Census Bureau show that 60 percent of all jobs in 2010 required such education/training.

Because the BLS does many occupation-specific projections, we use their numbers even if they tend to be too conservative in the jobs requiring postsecondary education. The BLS numbers below also show projected increases in a specific occupation, they do not show the replacement demand resulting from the Baby-Boom generation reaching retirement age. Thus, we encourage the reader to look at these projections as being the conservative estimates of what will really be needed.

The demand for skilled workers in many professions is in sync with the primary areas of focus in our sector's career education programs. The list of primary programs currently offered by APSCU member schools include:

- Health Professions – with a huge focus on medical assistants, LPN and LVN.
- Business Management – including business administration or management, accounting
- Computer/IT – including computer programming, Systems Networking and General Repair
- Legal Professions and studies
- Homeland Security, Law Enforcement
- Mechanic Repair and Technology
- Personal and Culinary Services
- Engineering Technologies
- Visual and Performing Arts
- Construction
- Communications Technologies
- Transportation.

The projected growth for these occupations by 2022 is significant! BLS projects a:

- 5 to 11% increase in Commercial Truck Drivers
- 29% increase in Medical Assistants
- 22% increase in LPN/LVNs
- 19% increase in RNs
- 21% increase in HVAC technicians
- 17% increase in Computer support Technicians
- 13% increase in barbers, cosmetologists
- 23% increase in Massage Therapists
- 25% increase in Construction/Builders
- 19% increase in Management Analysts.

These numbers give credence to the projections for an actual increase in postsecondary career education. (The reader should note that BLS recently updated these numbers to 2024 projections. In every case above, the demand exceeds the average projected growth for all occupations.)

Determination

In the midst of the recent challenges confronting our sector, one of the long-time leaders of this sector offered me some strong advice. He said, "This sector is not going away because we meet the needs of our students. The laws of economics will always overcome the laws of politics."

In basic math, the challenge of our sector is that the costs of operating our schools must be paid for by the students as there are no public operating subsidies. The chart below, showing data from the fall of 2014, shows the dramatic differences in the business models of the different sectors of higher education today. Public schools, especially 2-year schools depend significantly on government operating support while private sector schools rely even more on income directly from students who chose to enroll in a specific program pursuing a specific career.

	4-year Public	2-year Public	4-year P-NP	4-year FP	2-year FP
Revenues:					
Tuition/Fees:	20.3%	16.7%	29.5%	90.7%	88.6%
Gov't:	22.8%	65.1%	7.9%	4.%	3.9%

While the sector has been attacked for how its revenues are used, the data makes pretty clear that the typical career school focuses its work on the students. If one takes just the direct student support expenses (Instruction, Academic Support, and Student Services) a 2-year for-profit school allocates 56 percent of its expenses to these three programs. If one includes institutional support – defined by NCES as the "day-to-day operational support of the institution" then the proprietary sector really commits almost all its funds to these four key areas.

	4-year Public	2-year Public	4-year P-NP	4-year FP	2-year FP
Expenses:					
Instruction:	29.1%	42.9%	32.9%	25.4%	32.2%
Academic Support:	8.3%	8.8%	9.%	9.1%	8.3%
Student Services:	4.9%	10.5%	8.4%	21.4%	15.5%
Institutional Support:	8.8%	16.4%	13.1%	35.2%	30.9%
Total: 4 key areas:	*51.1%*	*78.6%*	*63.4%*	*91.1%*	*86.9%*

-NCES, 2015

Even though most private sector schools have neither tenured nor unionized faculty, their total commitment to academics is quite strong – and certainly comparable to the rest of higher education. But it is in Student Services that the sector makes by far the greatest commitment; and makes the right investment to achieve better outcomes.

Degrees

With the focus on outcomes and education costs, more schools – and more students – are pursuing postsecondary education through incremental steps. Certificates and Associate Degrees reflect this new path. While BA degrees continue to dominate academic awards, the growth – dramatic growth – is with certificates of 1-2 years. Between 2008 and 2013, we witnessed a 64 percent increase in such certificates; compared to a 37 percent increase in AA degrees, a 27 percent increase in certificates of less-than-one-year, and an 18 percent increase in BA Degrees.

It is worth recognizing who is focused in each of these academic award areas. The increase in 1-2 year certificates resides in 2-year private sector schools where 46% of all their awards in 2013/14 were such certificates. Because of the size of the community college sector nationally, in total numbers the community colleges actually issued more 1-2 year certificates. However such certificates represent only 16% of the sector's total awards because 59% of all community college awards are AA degrees – a number that is likely to increase as they increase their focus on 4-year articulation agreements. Public 4-year colleges continue to dominate the traditional BA degrees as 64% of their awards are in this category.

Framing the Future:

What then is the future for postsecondary career education – and specifically those schools who have made such education their mission?

It is actually more encouraging than the recent headwinds suggest. There are many reasons for this conclusion.

First, as the sector is defined by the mission of postsecondary career education rather than either the corporate structure of most schools, or the form of academic delivery, it will be positioned to serve a growing demand. We know that both demographics and an increase in demand for postsecondary occupational skills define the sector's future. While meaning no disrespect, private 4-year for-profit colleges are best known for their on-line, distance education programming. No less than 58 percent of their students participate in exclusive on-line programs. Such programs are primarily liberal arts focused; as most career education programs require some levels of on-site labs and often include some form of externships.

Second, almost every projection suggests an increase in postsecondary enrollments. The economy, combined with demographics, has actually reduced total student enrollments in recent years. That is expected to change for many reasons including a demand for more postsecondary skills in the American workplace. Projections by the National Center for Education Statistics show a 7% increase in total postsecondary enrollment between 2015 and 2020.

More specifically, between 2012 and 2022 they project:

- A 20% increase in 25 to 34 year olds, and
- A 23% increase of 35 and older students.

No sector is designed to better serve this older student body than the nation's career colleges. By 2022, 10.1 million postsecondary students will be 25 or older.

The key to success in an era of educational stepping stones is to recognize *both* the students' academic achievements and their career skills. The sectors of higher education that can do so will be at the front of the next decade's education delivery system.

Third, the sector has moved from a focus on admissions to a focus on outcomes. As mentioned earlier in this paper, while enrollment is down 562,587 students over the five-year period (2010-2014) the actual number of academic awards annually has increased by 20,877!

We must admit that some headwinds will continue. Certainly the administration's ideological opposition to the private sector's delivery of education will continue. Our ability to innovate and keep pace is being challenged by the inability of some schools to create and/or get approval for new programs designed to meet the changing demands of the workplace in these challenging economic times. And while the costs – especially taxpayer costs – of our sector will always be lower the tuition cost will continue to be higher simply because tuition and fees must cover operating costs.

But if one combines some key factors defining the future of higher education, there is reason for optimism and growth. We know that demographics and a changing economy combine to increase demand for specific occupational skills. We also know that this sector has a long tradition of programming in many areas with projected growth over the next decade. As the demographics – from race/ethnicity to age of the students – continue to evolve, this sector has the history and culture of successfully serving minorities and older students.

By choice, economic necessity, or political climate, this sector has changed! In the last five years, the data shows significant change. The immediate challenge is in communicating that change to policy makers, the media and others engaged in postsecondary education so that today's public policy reflects today's sector.