



2019 HIGHER EDUCATION LEADERSHIP SERIES

University of Chicago – Keller Center

THE EVOLUTION OF HIGHER EDUCATION AND THE IMPACT ON U.S. CAMPUSES

HIGHER EDUCATION INDUSTRY & FACILITIES TRENDS



2019 HIGHER EDUCATION SURVEY

ABOUT THIS STUDY

Higher education institutions in the United States are in a time of transition. In the face of funding challenges and increased pressure to grow enrollment, higher education leaders are being asked to adopt evolving methods of teaching and do more to support the students they serve.

To understand higher education challenges, opportunities, and effective campus practices, we surveyed nearly 100 professionals at the 2019 Society of College and University Planning (SCUP) annual conference. Survey participants represent higher education planners and administrators as well as the architects who support them.

This is the second study we have conducted at the SCUP annual conference since 2012. This study takes a close look at how things have changed over time.

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LET'S BREAK DOWN WHAT WE LEARNED

CAMPUS ADMINISTRATORS ARE CAUGHT IN A BALANCING ACT

Top challenges facing today's campus administrators:

- 1 | Aligning student demands with the reality of shrinking budgets
- 2 | Increasing enrollment in a highly competitive environment
- 3 | Ensuring student success

“Our universities have become more competitive and provide more to the student and their experience... but that comes at a cost.”

Survey Respondent

INSTITUTIONS ARE INVESTING IN CAMPUS IMPROVEMENTS

89% of higher education professionals say campus facilities have a **substantial impact on recruiting new students**

Collaborative common spaces have the biggest impact on attracting new students

In the next three years...

47% expect **increased construction activity** on their campus

35% anticipate their **campus will get bigger**

TEACHING METHODS AND TECHNOLOGY HAVE CHANGED THE LANDSCAPE

40% of the study participants rank **new instructional methods** as the most exciting trend in higher education today

3 OUT OF 4 higher education professionals believe **online learning** will impact the number and nature of institutions in the U.S.

36% of higher education professionals said **developing the classroom of the future** is a top facilities-related priority

HIGHER EDUCATION PROFESSIONALS TODAY FACE A TALL HURDLE

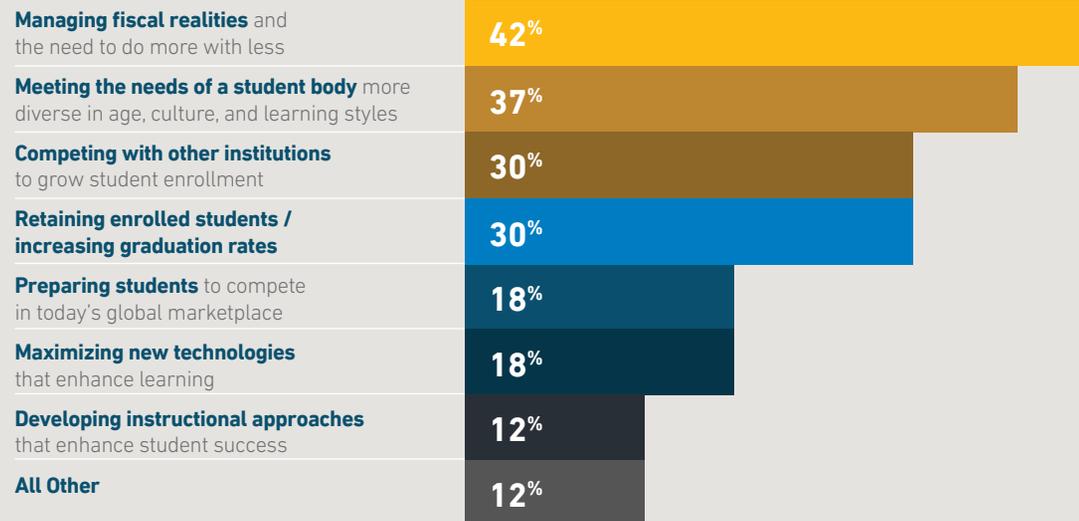
At a time when funding dollars are stretched and competition is fierce, higher education professionals are tasked with increasing enrollment and doing more to support the students on their campus. More than 40 percent of higher education professionals ranked managing fiscal realities as one of their top two most difficult challenges. Tighter budgets make other priorities they face – such as meeting the needs of an increasingly diverse student body, growing enrollment, and increasing graduation rates – even more difficult.

All the while, the very landscape of higher education is in the midst of tremendous evolution. Campus administrators and planners are adapting to the changes technology and new instructional approaches bring to the traditional classroom, and they are working to ensure today's graduates are prepared for modern-day industry needs.



HIGHER EDUCATION PROFESSIONAL RESPONSES TO:
What are the top one or two most difficult challenges currently facing your institution?*

Top challenges from today:



Top 5 challenges from our 2012 study:

- Rising tuition and costs
- Lack of funding
- Student engagement
- Aligning education with future needs
- Unwillingness to adapt to times/new technology

*% of higher education professionals who selected the following areas as their top 1 or 2 most difficult challenges.

COMMENTS FROM HIGHER EDUCATION PROFESSIONALS ON THEIR BIGGEST CHALLENGES

The greatest challenge is the **transformation of education subject matter** in a post-industrial age; or a restorative age that creates more from less.

Reduced domestic enrollment, poor ability to support mature students.

Lack of funding.

Expectation that learning should come to the student instead of the student traveling physically to campus.

Creating spaces now that will be able to accommodate needs in the future.

Competitive marketplace.

The ability to get professors to progress to students' current needs. Align curriculum with industry needs.

Skepticism around the value of a college education given the huge amount of debt most students carry after graduation.

IS THE COST OF TUITION WORTH IT?

Reports of tuition hikes and skyrocketing student debt are increasingly in the news, leaving many to wonder if the cost of obtaining a college degree will pay off in the long run. When asked about higher education affordability, 63 percent of our survey respondents said they believe higher education is a good value for the money students and their families spend.

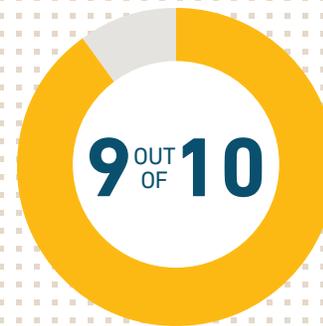
At the same time, 86 percent of the participants — nearly 9 out of 10 — said colleges and universities need to find ways to reduce tuition and make higher education more affordable for students. Higher education affordability is a significant challenge facing institutions today, especially in light of funding hurdles and increased competition for enrollment. As tuition increases, students expect more for their money, and institutions are faced with an increasing arms race to attract and retain the best students.



ALL RESPONSES TO:
Regarding higher education affordability...



AGREE HIGHER
EDUCATION IS A GOOD
VALUE FOR THE MONEY
STUDENTS AND THEIR
FAMILIES SPEND



AGREE COLLEGES AND
UNIVERSITIES NEED TO FIND
WAYS TO REDUCE TUITION AND
MAKE HIGHER EDUCATION
MORE AFFORDABLE

FOCUS ON STUDENT SUCCESS

Despite the funding challenges institutions are facing, there is optimism about many of the developments taking place on today's college campuses.

Forty percent of the study participants talked about improvements in teaching methods — such as interdisciplinary learning, collaborative and engaging instructional methods, and experiential learning — that help to enhance student success.

Participants also shared enthusiasm for approaches that serve the unique needs of each student and encourage lifelong learning, such as alternative credentialing, improved advising services, and individualized programs and curriculum paths.

Improvements to learning spaces, integrating technology into the learning experience, and making higher education accessible to more people were other common themes.



ALL CODED RESPONSES TO OPEN-ENDED QUESTION:

What is the most exciting trend taking place in higher education today?

Top exciting trends from today:



Top exciting trends from our 2012 study:

- Broader access (technology, school options, open source materials, etc.)
- Improvements in teaching methods and engagement
- Better facilities
- More interdisciplinary research and degree options

COMMENTS FROM HIGHER EDUCATION PROFESSIONALS ON EXCITING TRENDS

Cross-discipline learning and lifelong learning.

Large-scale pathways reform to optimize the student experience; moving beyond completion as the end-game to economic mobility.

Spaces are being redesigned to address the change in pedagogy.

Greater access for more students to bridge the achievement gap.

Shift to encompass and educate the entire student (body, mind, and soul) on the campus setting.

Teaching methods are changing to be more interactive and engaging.

Online access, increasing access for women to STEM.

Shifting focus to more individualized programs and services for each unique student.

Experiential learning focused on leveraging people to solve problems around us.

Collaborative learning and innovative credentialing.

ONLINE LEARNING: DISRUPTIVE FORCE

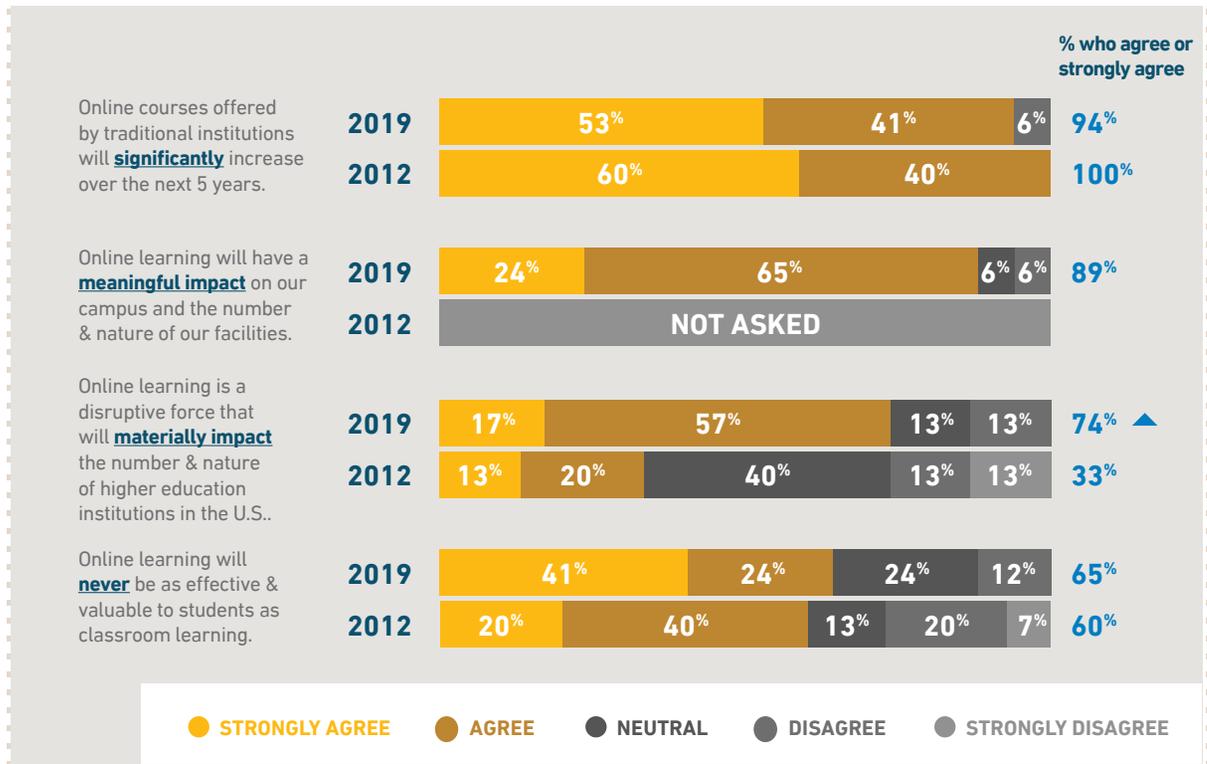
Online learning makes higher education more accessible to a broader demographic of students, and our survey participants overwhelmingly agree that online courses are here to stay. Older students seeking their first degree, established professionals pursuing a second or advanced degree, and even high schoolers getting a jump start on college are taking advantage of online flexibility.

74% of higher education professionals believe online learning will impact the number and nature of higher education institutions in the U.S. That's a significant increase compared to our 2012 survey when only a third of respondents shared that opinion, indicating that higher education professionals underestimated the extent to which online learning would transform education.

Survey participants also anticipate online learning will have an impact on the number and nature of facilities on their individual campus. However, in both our 2012 and 2019 studies, professionals are divided on the value of online learning compared to traditional classroom settings.



HIGHER EDUCATION PROFESSIONAL RESPONSES TO: Regarding online learning...



3 OUT OF **4**

Higher education professionals believe online learning is a disruptive force that will materially impact the number and nature of higher education institutions in the U.S.

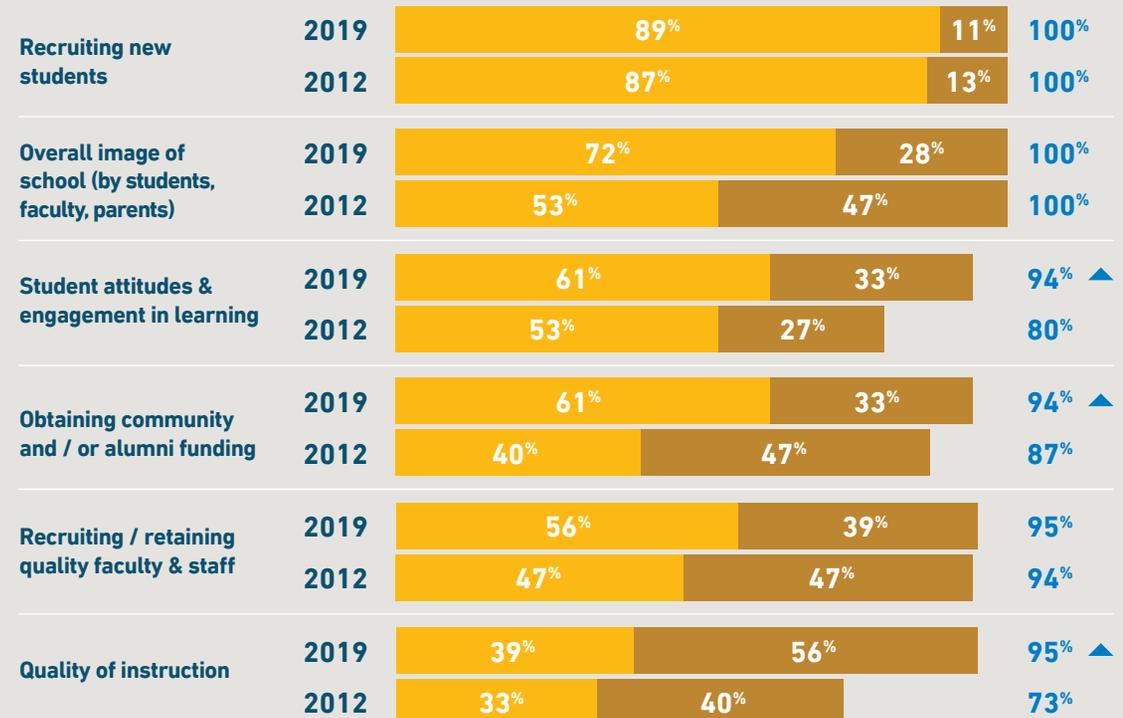
FACILITIES IMPACT SUCCESS

Higher education professionals are astutely aware of how the design of their physical campus facilities impacts everything from recruiting to student success. In fact, nine out of ten professionals believe the design of their facilities has a significant impact on recruiting new students.

These responses are generally consistent with the results of our 2012 survey, but today's survey participants are more inclined to believe the design of their facilities impacts student success by increasing student engagement and improving the quality of instruction. There is also an increased perception that facility design can help institutions obtain more funding and donations from alumni and the community.



HIGHER EDUCATION PROFESSIONALS RESPONSES TO:
To what extent does the design and quality of an institution's campus facilities have on...



● SUBSTANTIAL IMPACT ● MODERATE IMPACT

SOCIAL, COLLABORATIVE SPACES ARE KEY

Higher education professionals tell us that today's incoming students are looking for opportunities for face-to-face collaboration, and common spaces that foster this type of interaction — from student unions to learning centers to informal “soft study” areas — have the biggest impact on attracting new students to their institutions. Academic and research spaces, especially with enhanced technology, also have significant importance. Student housing, recreation facilities, and green space were other areas mentioned.



HIGHER EDUCATION PROFESSIONALS RESPONSES TO:

Which campus facilities have the greatest impact on attracting quality students?*

42% Collaborative Common Spaces

- “Student union amenities that provide diverse group and individual environs... from social to study.”
- “Opportunities for face-to-face collaboration and sharing of ideas.”
- “Student centers — the main hub on campus where students see themselves (or not) at that institution.”

32% Academic & Research Spaces

- “Tech-enhanced classrooms.”
- “Specialty labs.”
- “Research collaboration building.”

26% Student Housing, Recreation, Green Space

- “Food and accommodations.”
- “Green/recreational spaces.”
- “Residential and recreational facilities.”

* % of all responses. Coded responses to open-ended question.

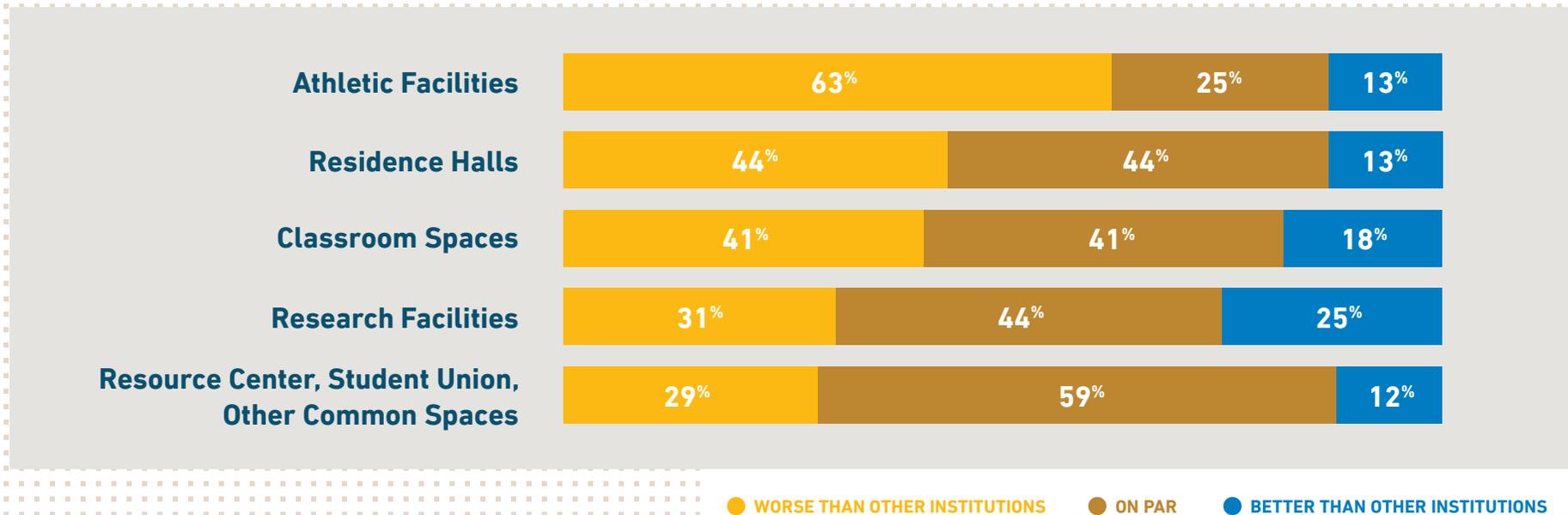
NOT STACKING UP TO COMPETITION

Most higher education professionals believe the facilities at their institutions generally fall short or on par with facilities at competing institutions. Athletic facilities, residence halls, and academic spaces are most commonly considered to be worse than other institutions.



HIGHER EDUCATION PROFESSIONALS RESPONSES TO:

How would you rate the spaces on your campus compared to other institutions?



WHAT WOULD YOU CHANGE ON YOUR CAMPUS?

When asked which facility they would like to change on their campus, half of our survey respondents mentioned academic or research facilities. Nearly 30 percent mentioned student centers.

Participants agree on the challenges that face higher education leaders and the students they serve:

- “Classrooms more flexible to learning requirements.”
- “Make an inviting and inclusive one-stop-shop student center with multi-use options.”
- “We need to upgrade our learning spaces and build a dedicated learning environment building.”
- “Student center to be more interdisciplinary and flexible.”
- “Improve science facilities. They need to be updated to improve teaching.”
- “Demo and replace old lab buildings.”
- “Change 60s-style dorms to faculty offices and move students into more modern residence facilities.”
- “Libraries – more in line with current trends in instruction, space use, and modes of research.”

50% Academic/Research Facilities

27% Student Centers

14% Residential Buildings

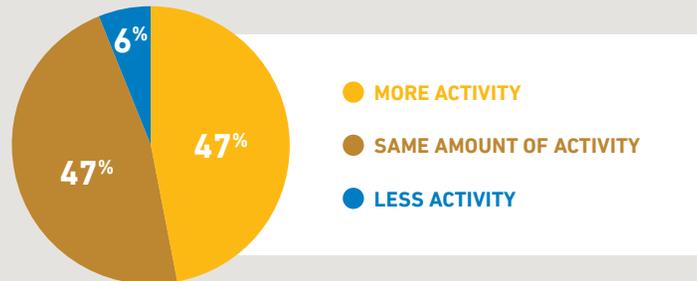
CAMPUS INVESTMENTS CONTINUE

Despite the growth in online learning and the need to support virtual learners, higher education professionals tell us they continue to make investments in their physical campus facilities. In fact, nearly half of the higher education survey participants anticipate increased construction activity on their campuses in the next three years, and more than a third of the participants expect the physical size of their campus will increase over the next decade. However, many respondents tell us their building activity has shifted toward remodel or renovation projects as opposed to new construction.



HIGHER EDUCATION PROFESSIONALS RESPONSES TO:

How will construction activity in the next 3 years compare to activity in the past 3 years?



What do you think will happen to the physical size of your institution's campus over the next 10 years?



To what degree has activity shifted to remodel or renovation as opposed to new construction?



A FOCUS ON FINANCES AND THE FUTURE

When asked to select their top two facilities priorities, campus planners tell us they are focused on finances and preparing for future needs.

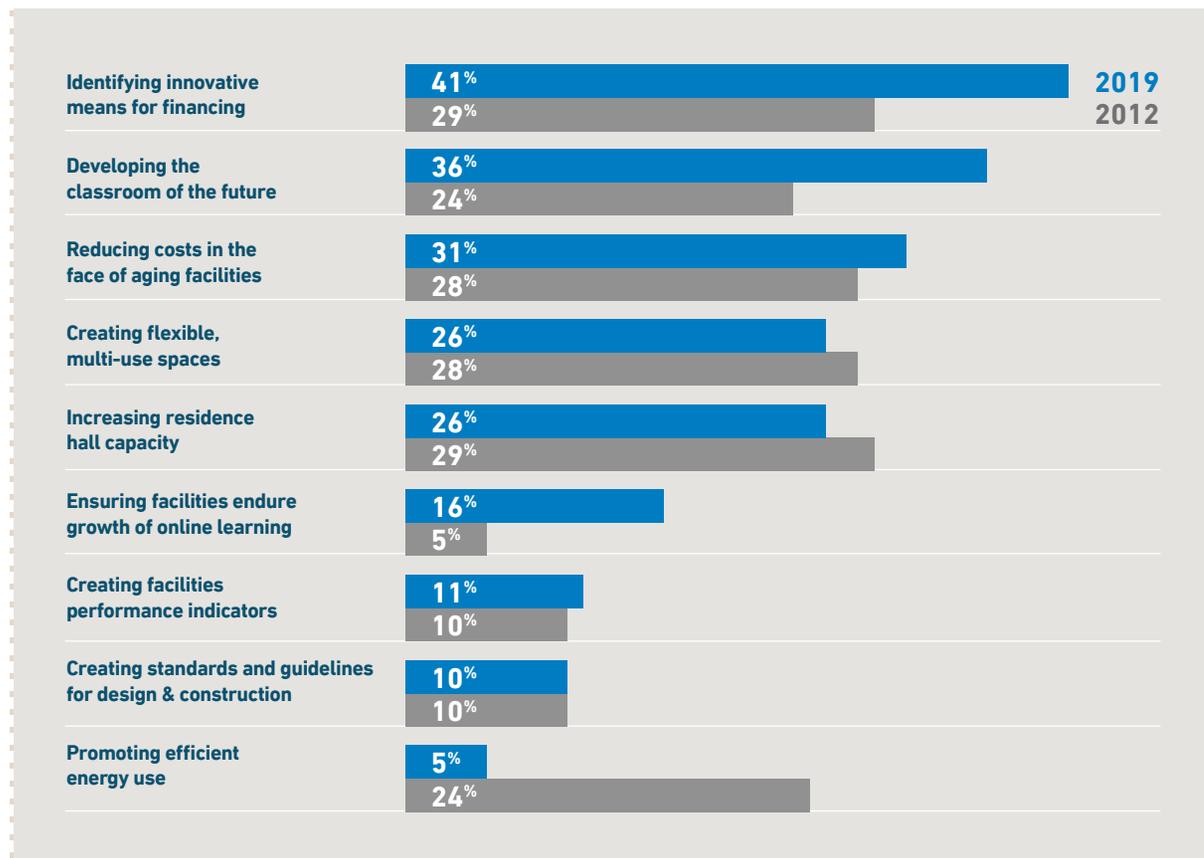
Identifying innovating means for financing, developing the classroom of the future, and reducing costs in the face of aging facilities each received votes from more than 30 percent of our survey participants, while creating flexible spaces and increasing residence hall capacity both received votes from 26 percent.

Compared to our 2012 study, campus professionals indicate they are placing a higher priority on ensuring facilities endure the growth of online learning, while there is less emphasis on promoting efficient energy use.



HIGHER EDUCATION PROFESSIONALS RESPONSES TO:

What are your institution's top 2 facilities-related priorities for the next two years?*



*% of higher education professionals who selected the following areas as the top 2 facilities priorities for their institution.

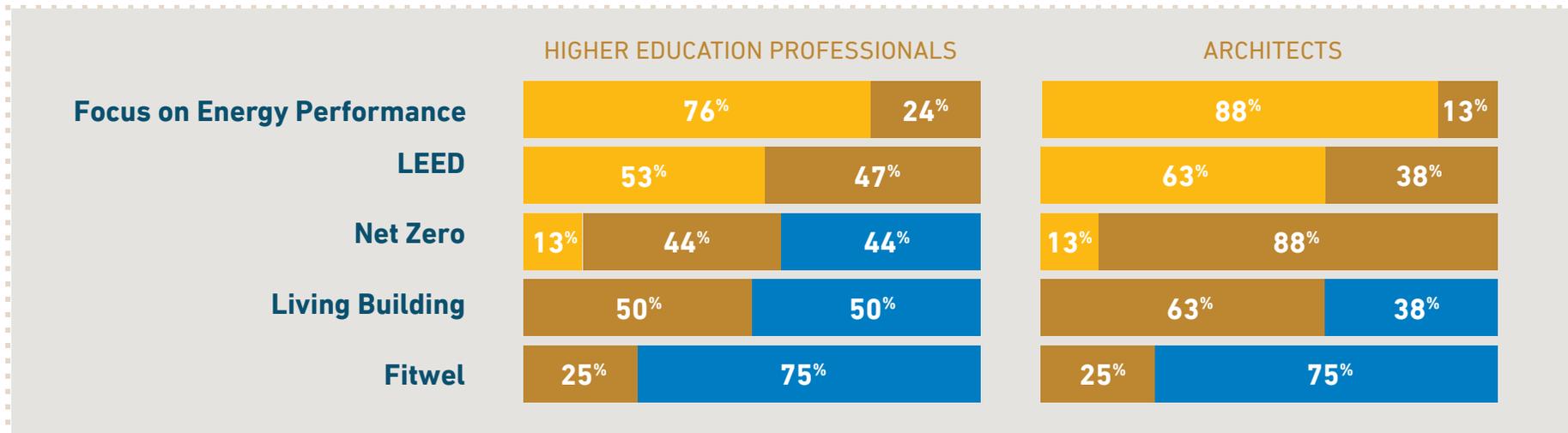
SUSTAINABLE MEASURES

While traditional sustainability initiatives such as LEED certification and moving toward net-zero facilities are still an important focus on college campuses, both higher education professionals and architects say their primary measure of sustainability is a general focus on the overall energy performance of their facilities. Emerging sustainability measures such as Living Building and Fitwel are beginning to gain some traction, but have not been widely adopted at this point. When asked what specific types of actions were underway to reduce energy costs at their institutions, campus planners mentioned initiatives such as energy-efficient HVAC and lighting upgrades, exploring alternative energy sources such as solar, space use analysis studies, and water conservation.



HIGHER EDUCATION PROFESSIONALS RESPONSES TO:

How would you rate the spaces on your campus compared to other institutions?



● SUBSTANTIAL USE ● SOME USE ● NO MEANINGFUL USE

COMMENTS FROM HIGHER EDUCATION PROFESSIONALS ON THEIR BIGGEST CHALLENGES

People matter! The best tools, procedures and models are worthless without people to implement them.

Be clear about who is the voice of the user. **You will have many competing user opinions** and you need to know in advance who has the final say.

Listen!!!! To everyone.

Bring all stakeholders together regularly throughout the project.

Spend more time on planning before jumping into design.

Convince leadership that the **user experience** should be paramount.

Know and agree on the scope early with high-level approvals.

Program first with a budget... not the other way around.

Consult all segments of the institution.

PREFERENCE FOR INTEGRATED PROJECT DELIVERY

The project delivery method used on construction projects can significantly impact the outcome. Higher education professionals who responded to our survey tell us that Design-Build and Construction Manager at Risk are the delivery methods most commonly used at their institutions.

Proponents of Integrated Project Delivery (IPD) give the model high rankings for flexibility, value, and quality. Survey respondents remarked that the IPD model delivers a “better final outcome,” a “comprehensive approach from start to finish,” and “shared goals and risks.”

Design-Build and Design-Bid-Build are preferred by another 42 percent of respondents. Survey participants applauded these methods for being efficient and cost-effective.



HIGHER EDUCATION PROFESSIONALS RESPONSES TO:

What is the most utilized delivery method at your institution?



If you had your choice, which delivery method would you use?



1/2

Nearly half of the participated singled out Integrated Project Delivery (IPD) when asked what method they would prefer to utilize if they had their choice.

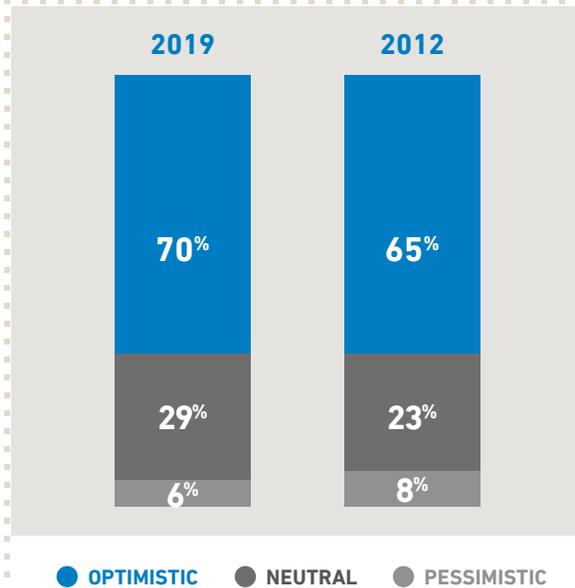
RISING TO THE CHALLENGE

Higher education institutions in the United States today face challenges, indeed. Nevertheless, we have many reasons to feel encouraged, and the majority of our survey participants say they face the future with optimism. In fact, responses to our 2019 survey expressed a slightly more optimistic view than responses to our 2012 survey.



ALL RESPONSES TO:

When you think about the future of higher education in America, are you:



Participants agree on the challenges that face higher education leaders and the students they serve:

- "Concerned about student loans."
- "Cost is prohibitive to most people. The student debt situation, high interest rates for loans and predatory lenders need to be addressed legislatively."
- "We need funding."
- "Our universities have become more competitive and provide more to the student and their experience... but that comes at a cost."

Yet there is a fundamental belief that institutions will rise to the challenge.

- Human beings will always need to keep learning, regardless of age/focus."
- "We are resistant to change, but powerful at innovation."
- "Education has more value in the future workplaces."
- "There will always be a demand for value-added credentials beyond what is provided in high school."



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