# Higher Ed's Big Restructuring: Adapting to the Era of the Modern Learner

By Ben Upton

Inside Higher Ed | WITH SUPPORT FROM modern campus

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# Higher Education's Big Restructuring

Megan graduated at the top of her high school class – straight A's, AP, 1400+ SATs. By every traditional measure, she is an ideal candidate for a four-year residential college experience.

## But Megan chose a different path.

After discovering welding in high school, she accepted an apprenticeship with a local employer. The company provided training, salary, benefits, and supported her need to balance time to complete her education. While she continued her studies, she also advanced professionally—earning promotions, leading teams, completing her bachelor's degree debt-free, and eventually pursuing an MBA while working full time.

She took an untraditional path. But that path didn't take her away from higher education—it eventually brought her back, and in a way that was convenient for her. She could continue building her career while finishing her degree, and that flexibility made all the difference.

Megan chose welding – her path wasn't linear. Welding didn't lead directly to business school. But it was her pathway. And it worked. That's the blueprint of the future. Learners like Megan—flexible, non-linear, workforce-aligned—are showing us the way forward.

This is just one of the thousands of paths that learners may choose to take. And it addresses all the media headlines that today's higher ed leaders are facing—access, supporting completion and reducing the cost.

Learners are increasingly designing educational journeys around flexibility, affordability, relevance, and career outcomes rather than around the structures that institutions have historically built to serve them.

That distinction matters because the challenges facing colleges and universities today cannot be understood as a temporary cycle. They are the result of forces that are fundamentally reshaping higher education itself. They are interconnected signals of a larger transformation.

## This report examines four forces driving that transformation.

**Value and affordability** are redefining how learners evaluate higher education, with increasing emphasis on return on investment and pathways that reduce both cost and risk.

**Artificial intelligence** is accelerating changes in workforce demand, creating pressure for institutions to adapt programs, credentials, and learning experiences more quickly than traditional governance structures were designed to support.

**An increasingly dynamic regulatory and funding environment** is creating both new challenges and new opportunities for institutions willing to rethink how their programs align with evolving government and industry priorities.

**And perhaps most significant**, for the first time in history, five generations of learners are engaging with higher education simultaneously. This is no longer a single pipeline of 18-year-olds. It's a wide river of learners—each with unique goals, pressures, and expectations."This report is intended to help leaders understand why this moment feels different. More importantly, it offers a framework for thinking about what comes next.

Because learners like Megan are not an exception to higher education's future.

They are helping define it.

With Regards,

**Craig Chanoff**
CEO, Modern Campus

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The 5G Learner Era



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# Something Fundamental Has Changed in Higher Education.


5G modern learner

For the first time, five generations of learners are pursuing education simultaneously, bringing vastly different goals. expectations, and pathways to success.

This is the defining shift of the 5G Learning Era.

Learn more at moderncampus.com/the-5g-learner

# Introduction

Higher education has always changed, though rarely at a steady pace. The fits and starts of the past decades—including the Great Recession and global pandemic—were at least somewhat staggered. Not so these middle years of the 2020s.

“Sector-wide, it is hard for institutions to do anything right now other than put out fires,” says Will Carroll, a principal at the postsecondary consultancy HCM Strategists.

The challenge is not any one force in isolation. Demographic shifts are shrinking the traditional college-going population just as learners of all ages are demanding more affordable, flexible and career-connected pathways. Artificial intelligence is reshaping the skills students need and how institutions deliver value—all while sweeping federal policy changes are altering the rules of the game.

This report examines the economic, regulatory, technological and demographic forces pushing the sector past mere recalibration of a familiar model.

And while these forces may herald the end of one era, they could also push higher education beyond the assumptions that have limited it for the past century. With the sector facing both unprecedented constraint and openings for reinvention, this report also considers what may have to be remade for institutions to thrive in the decades ahead. ■

## Bottom Line Up Front

Higher education is experiencing what's been called a polycrisis, and the institutions navigating it successfully are not simply waiting it out. They are adapting to a set of structural forces that may be permanently changing what higher education is, who it serves and what it must do to remain relevant:

- The economics of value and affordability, which are forcing institutions to justify their proposition to learners with more options and less margin for error
- AI, which is disrupting curricula and workforce alignment faster than typical governance structures can respond
- A volatile regulatory environment that is creating both constraint and opportunity
- Five generations of learners engaging with higher education simultaneously—each with distinct needs that most institutional systems were not designed to accommodate at once

# More Than a Cycle

Tackling these challenges together requires a shift in thinking—and in language. Higher education futurist Bryan Alexander, senior scholar at Georgetown University and author of *Peak Higher Ed: How to Survive the Looming Academic Crisis*, looks downhill from the enrollment peak of 2010–11 through the lens of the "polycrisis," arguing that none of the current challenges can be isolated or ignored. The dip in births following the Great Recession does not just throttle traditional-age college enrollment, he says: Overall aging of the U.S. population shifts public funding away from higher education toward other services.

This demographic change is also not just the "cliff" popularized by economist Nathan Grawe—nor is it limited to the United States. Enrollment strategies cannot be short-term, nor just look abroad for answers in the form of more traditional-age students, Bryan says: "Think about the extension of lifespans as a result of the demographic transition. How do you teach or support the over-65 population? That's different from state to state, institution to institution."

Katie Berger, strategy director for federal policy at the access-focused Lumina Foundation, adds that "we are hitting a point where the traditional system and the way that it's functioned doesn't seem sustainable with smaller tweaks or changes on the margins." While the pursuit of out-of-state and international enrollments after the Great Recession generated revenue with minimal changes to operations, she says, this strategy is not reliable long-term. Subsidizing undergraduate and other operations via high-revenue graduate programs—previously a common practice—is also trickier following major changes to federal graduate student lending under the One Big Beautiful Bill Act (OBBBA) that took effect July 1, she adds.

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> **Major transformations in the history of higher education are best viewed in retrospect, but I think it is reasonable to believe that we're in one of those major transformations now.**
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> **Joe Ross**, CEO and president of Reach University

## More Than a Cycle (cont.)

Adding to the polycrisis is COVID-19, says Jack Corby, vice president of the consulting firm Stevens Strategy: While the pandemic brought some positive changes, such as richer online instruction and a broader, more balanced notion of who could be a student, the temporary infusion of federal relief funds masked rot. "All of that money was pulled out from under them all at once," he adds of the money drying up, "and now a lot of institutions are faced with a business model that was struggling pre-COVID and is now under severe pressure."

Will all institution types be impacted? Up until about 18 months ago, Alexander says, "quite a few elite institutions would tell me that their wealth, their reputation, their huge networks would protect them from this, but of course the federal government's attacks on specifically elite institutions have in some ways put paid to that."

Berger says that historically well-funded state systems such as those in New York, California and Texas may have a more cushioned ride, although state-specific governance, scale, market density and leadership may matter more to financial survival.

Carroll, of HCM Strategists, adds that higher education will not emerge from this moment "unrecognizable." And beyond just disruption, some see opportunity.

Joe Ross, CEO and president of Reach University, which is dedicated to apprenticeship degrees, says that while "major transformations in the history of higher education are best viewed in retrospect," it's "reasonable to believe that we're in one of those major transformations now." He compares the ongoing shift to earlier, once-in-a-century expansions of access. ■

# The Four Forces Reshaping Higher Ed

While their effects vary by institution, intersecting factors are influencing higher education: economics, regulation and policy, technology, and demographics.

## Economics

A majority of parents would still prefer their child enroll in a two- or four-year degree program after high school; an additional 16 percent would prefer job training or certification. But Americans are placing less importance on the value of a college education over the past 15 years, all according to critical polling by Lumina and Gallup.

For some, higher education lost its luster during the pandemic, says Corby, the strategist, adding that current high schoolers are more likely to weigh alternatives to college than their predecessors. Additionally, he says, "There are now tracks in America where 18-year-olds could go and get a six-month vocational training and start to make high five figures [in salary] or low six figures at 19 years old." And while a bachelor's degree will still boost lifetime earnings higher for most, that uplift can be slow and feel less certain than in the past, he adds.

Relatedly, affordability was current college students' most cited explanation for declining public trust in higher education in *Inside Higher Ed*'s 2025–26 Student Voice survey cycle. The same survey series found that beyond concerns about tuition, most students lack clarity about the full cost of attendance. Some 36 percent also said that an unexpected expense of $1,000 could threaten their ability to stay enrolled.

### Number to Know

**51%:** Share of current college students who say increased affordability would most increase their trust in higher education

**Source:** *Inside Higher Ed*/Generation Lab Student Voice flash survey on trust, 2025.

*IHE*'s 2026 Survey of College and University Presidents found that 70 percent of responding institutions had taken steps in the last year to improve cost transparency, such as via standardized financial aid letters or online cost calculators. Yet practices such as tuition discounting—which increased during the Great Recession—can still make options opaque. The National Association of College and University Chief Business Officers (NACUBO) estimates that the average discount rate continued to climb in the 2025–26 academic year, to 57 percent for first-time, full-time undergraduates and 51 percent for all undergraduates at private nonprofit colleges.

Even so, Lumina's Berger adds that concerns about ballooning costs in many four-year programs are particularly acute for financially precarious families. And CBOs are concerned about costs, as well: Just 28 percent are highly confident in their institution's business model, with tuition discount rates and lack of "rainy day" funds disproportionately worrying private nonprofit institution CBOs, according to additional survey data from *IHE*. CBOs as a group ranked enrollment declines, state and/or federal funding reductions, and rising personnel costs as the top three financial risks to their institution over the next five years.

Among the presidents surveyed by *IHE*, 45 percent cited cost pressures as the most impactful force on the sector between now and 2030, with private nonprofit presidents particularly concerned. "Costs are continuing to go up, so finding solutions is going to be really imperative," says Rachel Hirsch, vice president of public partnerships at the non-profit Council for Adult and Experiential Learning (CAEL). A shifting labor market and inflation are other economic pressures on institutions, she says: "I just don't see how that's going to be fully solved anytime in the near future." And while the overall unemployment rate is about steady at 4.3 percent, the unemployment rate for recent college graduates is higher, at 5.7 percent—and the underemployment rate for these graduates is significantly higher, at 41.5 percent.

## Regulation and Policy

The second Trump administration's major 2025 budget bill brought the biggest regulatory changes to higher education since 2008. These include institutional accountability standards tied to program-level outcomes, new loan limits and repayment reforms, and the extension of the federal Pell Grant program to short-term, work-force-aligned programs. "We went from almost no federal accountability standards in terms of out-comes to three or four," says HCM's Carroll, who expects funding cutoffs for poor-outcome pro-grams to continue into state legislation. Outside of OBBBA, the federal overhaul includes accreditation changes that increase accreditors' influence in key ways and ease the pathway for new accreditors. Changes to Pell and accreditation will encourage smaller, for-profit institutions specializing in short-form degrees, akin to those that emerged around the Great Recession, Carroll also predicts.

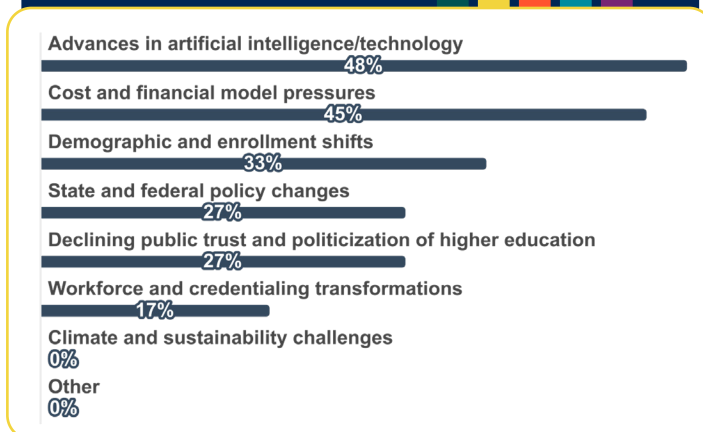
President Donald Trump signs the One Big Beautiful Bill Act last year. Many of the law's higher education provisions took effect this July 1. Credit: Getty Images

Most presidents (81 percent) who responded to *IHE*'s survey said the administration has had a negative impact on the regulatory environment for higher education. But Carroll says there are some silver linings. Regulations require states to establish data systems to monitor program outcomes and define credential stackability: "We get to see what 50 states do, and then we can share best practices, spread the lessons learned." Lumina's Berger adds that political parties' "ping pong" on policy and easily flipped administrative actions have left regulation unstable in recent decades. This raft of reforms should be sturdier, she notes—even as recent legislative and other legal developments challenging OBBBA's controversial professional program loan caps suggest some malleability.

## AI

Tech has changed higher education "around the edges" says Tawnya Means, an AI adviser at Bowling Green State University and founder and principal

### Presidents (all) predict which forces will most impact higher education by 2030, selecting up to 2 options:




**Source:** *Inside Higher Ed*/Hanover Research 2026 Survey of College and University Presidents (N=430)

at the consultancy Inspire Higher Ed. Radio, TV and the internet expanded educational access and diversified delivery, but the product remained the same, she continues; in contrast, generative AI "puts the ability for anyone to develop anything and learn anything in everyone's pocket." And collective decision-making in higher education can hardly keep pace with the drumbeat of new AI models: "It's hard to figure out where people should focus, and how to make decisions that are actually strategic instead of reactive."

*IHE* found that 48 percent of presidents predicted AI and other technology would have the biggest impact on the sector by 2030, edging out cost pressures. Student surveys also suggest a shift: Gallup has found that more than half of college students are using AI in their coursework at least weekly, with understanding complex material the leading reported reason. Additional Student Voice survey data suggest that while few students are "all in" on AI, six in 10 embrace it as a learning tool—though just one in 10 believes their institution is handling AI's rise very well, in a thoughtful and proactive way. A majority of students also expect AI to somewhat (39 percent) or very (16 percent) negatively impact their career prospects. Enrollment and other data suggest this is already affecting what students choose to study: Computer and information sciences undergraduate enrollment declined sharply this spring compared to 2025, by 8.4 percent at four-year institutions and 11.2 percent at two-year institutions, according to the National Student Clearinghouse Research Center (NSCRC); entry-level computer science jobs are understood to be among the most AI-exposed to this point. On the flip side, health professions enrollment continued to climb.

Means's own recent analysis of three separate datasets pertaining to students and young workers and AI found that "students are not asking to be trained as AI users." Instead, she wrote, "They are asking to be developed as thinkers who happen to have new instruments available. These are two fundamentally different educational projects, and most institutions have defaulted to the first because it is easier to operationalize. The cost of that default is significant—and it shows up in the data."

Aside from helping students learn well with AI, institutions face growing pressure to rethink curricula so students can thrive in an AI-enabled workplace. Kathleen deLaski, founder and board chair of the Education Design Lab (EDL), a nonprofit that develops education-to-workforce models, says the sector must "totally overhaul" general education curricula to match employers' demands for critical, AI-ready graduates. This doesn't just mean technical skills, but also the skills AI is designed to augment. "We have to step up our human skills and help students articulate them, discern them and talk about them when they're applying for jobs," she says.

Means, who has developed a framework for AI adoption, adds, "We want to give people the opportunity to be curious, to explore, to experiment, to actively be involved in something—any person, any age, any discipline—to be able to come in and say 'I see this thing that the organization is trying to do, and I can find ways to use these tools to make that thing work better.'"

## The Multigenerational Imperative

For perhaps the first time in higher education's history, colleges and universities are serving learners spanning as many as five generations simultaneously. While Generation Z continues to make up the bulk of traditional undergraduate enrollment, Generation Alpha—born starting in the early 2010s—is already entering dual-enrollment and early-college programs, which have flourished in recent years. Numbering just 300,000 in the early 2000s, dually enrolled students hit 2.8 million in 2023–24—a 12.7 percent increase over the prior year, according to an analysis of federal data by the Community College Research Center. Community colleges represent most of this growth, but colleges and universities in nearly every state are leaning into dual enrollment. Previous research indicates that dual-enrollment participants attend college immediately after high school at higher rates than their peers and—dual enrollment experience or not—Gen Alpha undergraduates will begin arriving on campuses in larger numbers later this decade (though their population is smaller than Gen Z in the U.S.). Early evaluations of Gen Alpha learners emphasize their innovation, digital fluency and interest in long-term career preparation and skill development, suggesting that they thrive on being co-creators of knowledge and solutions.

At the same time, many Gen Z and Millennial workers are returning to college or want to, to learn new skills and advance their careers—even if they're skeptical of the curriculum: About a quarter of Gen Zs and millennials surveyed by Deloitte last year said they were concerned about the relevance of curricula to the job market; about a quarter each also said they were concerned that higher education offered limited practical experience. More than half of respondents were already using AI in their jobs, though they were most likely to say that people skills such as communication, empathy, leadership and networking—along with time management—were required for advancement.

Generation X is also seeking reskilling and leadership development, with some research indicating that Gen Xers have been overlooked in the workplace for promotions, with employers "leapfrogging" from Baby Boomers to Millennials. Meanwhile, Boomers—who are delaying retirement—are also pursuing higher education to support encore careers, along with personal enrichment and lifelong learning. The University of Notre Dame's Inspired Leadership Initiative, for instance, invites accomplished individuals from all disciplines to "embark on a process of discovering, discerning and designing who they want to be in the next stage of their lives, taking advantage of the university's vast array of resources."

Credit: Hispanolistic/E+/Getty Images

Research from CAEL illustrates the scale of this shift. More than a quarter of U.S. adults ages 25 to 64—an estimated 41.7 million people—say they plan to enroll in some form of postsecondary education or workforce training within the next two years. Yet, 81 percent cite cost as a barrier and 67 percent point to time constraints, underscoring the need for more flexible pathways. “This is a group of people that if [institutions] don’t offer an attractive route to credentialing, they’re not going to come back to school,” says Hirsch. Opening new routes to faster, more flexible credentials, she argues, is ultimately “a rising tide that lifts all boats.”

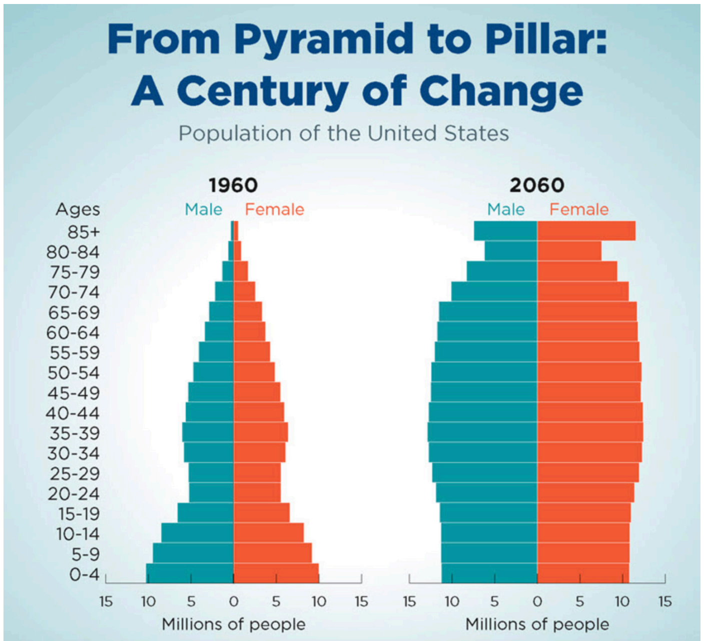
Interest in alternative pathways is real. Enrollment in undergraduate certificates, for example, saw an annual growth rate of 10.2 percent this spring, compared to 1.3 percent for associate and 1 percent for bachelor’s degrees, according to the NSCRC. Master’s degree enrollment fell 1.3 percent while doctoral enrollment was flat.

The demographic decline in traditional-age students only heightens the urgency for institutions to design for this multigenerational shift. A third of college students are age 25 or older, based on federal data, and the 43 million adults with some college credit but no credential represent another significant pool of potential learners.

But serving these learners requires more than recruiting them. Research on age-inclusive campuses points to the need for flexible scheduling, recognition of prior learning, specialized advising, mid-career guidance and help navigating financial aid. “Older learners are looking for a peer network and for mentorship,” says CAEL’s Hirsch, adding that institutions should consider the student experience “beyond just going to classes—helping make sure that these people feel like they belong—that they’re part of a community.” ■

## The Big Idea: ‘Cogeneration’

The nonprofit CoGenerate underscores that we’re living the most age-diverse time in human history, with five generations in the workplace at the same time—and that U.S. society remains deeply age-segregated, “with few opportunities for the generations to connect in daily life, much less combine their talents.” Among other goals, it seeks to promote intergenerational campus models that reimagine the future of higher education for all ages. Researchers note that while previous periods’ population charts resembled pyramids in shape, today they’re closer to rectangles due to more stable age distribution.




**Source:** National Population Projections, U.S. Census Bureau.

# What's Collapsing?

These four vectors will challenge institutional models, but they also raise questions for the entire sector: Who is it for? What should it offer? Where are its boundaries? Leaders are therefore rethinking:

## The 'Traditional Student' Assumption

The U.S. student body has changed since peak enrollment (about 18.1 million undergraduates in Fall 2010, compared to closer to 16.2 million last fall), becoming more racially diverse and slightly more female. Dual enrollment is growing, as is online education. Adult learners, who are more likely to be caregivers, working and enrolled part-time, make up an increasingly significant population for higher education, even if their share as total learners has declined slightly since peak enrollment.

"A larger share of institutions are thinking about serving students who aren't coming straight out of high school and opting for a residential, four-year, full-time experience," says Lumina's Berger. Older students are also more likely to be lower-income than their younger peers, supporting CAEL's and other research finding that circumstances, not desire, are limiting their participation. "It's a majority on a lot of campuses: students who are working at least part time or have parenting or caregiving obligations," Berger adds.

DeLaski, whose lab defines these learners as people for whom college was never designed, says they require accessibility, affordability, flexibility in scheduling, and immediate career relevance from their programs. In many cases, community colleges were hit earlier by enrollment declines, she adds: "They really had the wake-up call that 'We need to reinvent ourselves' at that point."

Berger notes that older students can also be beset by administrative issues, like not meeting the "arcane" federal aid threshold for satisfactory academic progress, or blocked by outstanding registration charges from an earlier enrollment: "The traditional higher ed system isn't necessarily built to make it easy to come back in."

At the same time, students of all ages prioritize curricular relevance in the classroom and flag outside issues that are impacting their academic success. Some 42 percent of all Student Voice respondents, and 50 percent of first-generation students, cite financial constraints as a top barrier to their success. Balancing outside work with coursework and mental health issues are other commonly cited challenges.

## The Credential's Assumed Value

A major 2024 study by Pew Research Center found that just 22 percent of U.S. adults think a four-year college degree is worth taking out a loan for. Separately, Berger, at Lumina, recalls focus groups with students and their parents on college affordability: A recurring theme was the formerly safe major of computer science, one of the first careers to be transformed by generative and agentic AI. She says participants doubted whether a four-year investment of time and money was worth it with such uncertainty: "That is driving more students to think about lower-risk pathways—credentials they can complete more quickly, or programs that are more directly tied to a specific career path."

Even before the AI boom, the Great Recession was a tipping point for higher ed's perceived value, Berger adds. "That's when a lot of the public consciousness around student loan debt that people were carrying for generations really materialized." Reach's Ross agrees: "The generation coming of age now has spent their childhood listening to their parents complain about student debt."

The degree's perceived value may wax and wane, but Berger believes the appetite for clearer workforce routes and shorter credentials will endure if they can deliver "good, family-sustaining–wage jobs."

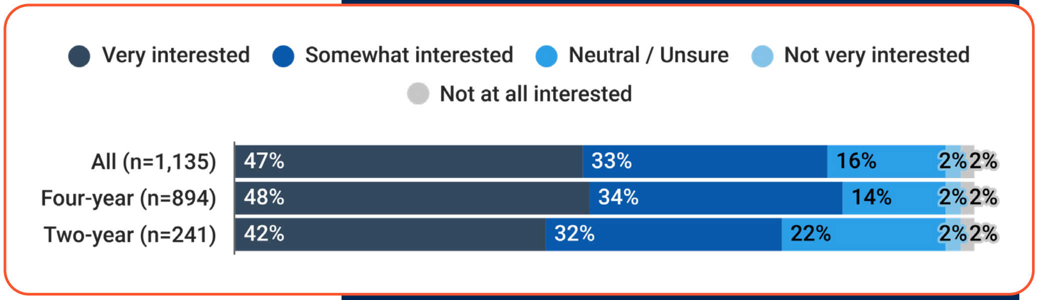
## Divisions Between Higher Education and the Workplace

Distinctions between institution types are softening (think of two-year institutions increasingly offering bachelor's degrees and some four-year institutions now offering two-year degrees), as is the line between education and work—what Jobs for the Future has called "the Big Blur," and it's AI-era iteration, the "Big Blur 2.0." The group says that learning and earning are now "intertwined precisely because adaptability, durable skills, and applied competence are becoming the real currency of opportunity." EDL's deLaski says the urgency with which prospective students are chasing employment is putting both four-year and graduate schools under pressure to offer more options, be they shorter credentials or workplace experience. Nearly all Student Voice respondents want work-integrated learning (WIL) experiences, with internships and part-time jobs related to their major the most popular options, and most students who've already experienced WIL want more. About a quarter of students are interested in apprenticeships, which are centered on full-time jobs.

Ross says that "if the 1800s was the century of the land-grant university, this will be the century of the work-based university." Apprenticeship training must still include the liberal arts, he adds, if apprentices are to engage with colleagues, challenges and change "with the creativity that higher education is supposed to deliver." If such a blurring does continue, HCM's Carroll says he hopes higher education becomes more accommodating and attractive to the many working students, especially parents, who identify as a worker who goes to school, rather than as a student with a job. ■

### Interest in WIL

Students, all and by institution type, express their level of interest in participating in work-integrated learning (WIL) or additional WIL opportunities if they've already participated:




**Source:** Student Voice flash survey on work-based learning, January 2026 • *Inside Higher Ed* x Generation Lab. Question: Looking ahead, how interested are you in engaging with (additional) work-based learning opportunities?

Credit: Filadendron/E+/Getty Images

# The New Operating Model

What should leaders do to address the polycrisis? "Colleges and universities need to be on a crisis footing in responding to this. Institutionally, they need to gather intelligence, they need to share that intelligence with their community and they need to think and plan accordingly," says Alexander, the futurist.

Although the response must be holistic, there are three areas where institutions are increasingly focusing their energies: curricula and credentials, technology infrastructure and identity.

## Curricula and Credentials

The college degree premium has narrowed but remains. But an especially dynamic labor market favors qualifications that are stackable, workforce-aligned and responsive by design. CAEL's Hirsch says a top priority for institutions under demographic pressure should be credit for prior learning (CPL). She says exemplary awarders include Harper College in Illinois, which offers up to 42 credits for prior learning—taking students most of the way to an associate degree—and University of Arizona Global Campus, which waives fees for certain types of CPL.

Although deLaski acknowledges the difficulty of four-year institutions adopting a "micro-pathways" approach to credentialing, she cites research showing how this can help attract learners of all ages. She advocates for a "stepladder," by which students pick up a series of credentials at a time and then return for more when they see fit. For those institutions that want to build on degree-length infrastructure and expertise, apprenticeship-style approaches could be one way to address affordability concerns, says Hirsch.

Teaching has long been an apprenticeable occupation, but Reach recently expanded into behavioral health. Hirsch says social work is another socially important but lower-paid profession that needs apprentices, and certain high-social-value programs will face pressure under the new federal earnings test. Ross sees additional apprenticeship potential in professions such as medicine and architecture. To him, the model can work wherever industries recognize apprenticeship's value to recruitment: turning "a dead-end job into a developmental job."

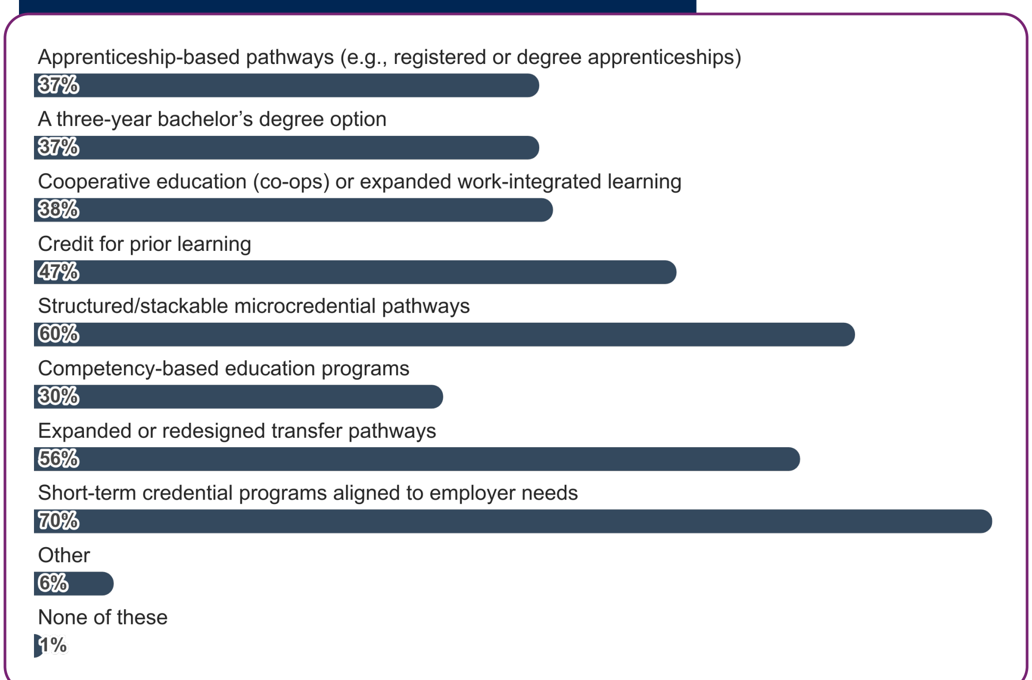
Credit: FatCamera/E+/Getty Images

Whether short-form or earn-and-learn, Hirsch says workforce training should carry portable college credit.

Any program should demonstrate career relevancy from day one, adds Carroll, arguing that institutions can also "simplify that complicated opportunity cost calculation" by offering students guaranteed destinations. He cites Northern Virginia Community College (NOVA)'s ADVANCE program for seamless, guided transfer to George Mason University as an example. Like deLaski, Carroll advocates for more pathways for students to move in and out of institutions—including within-system transfers from a regional campus to a flagship. He adds that any two- or four-year institution that builds strong relationships with local school districts and employers will "have the most success and be able to best communicate the value proposition to students in their area."

Presidents of all kinds of institutions express interest in curricular and credential innovation.

**Presidents, all and by institution type, on which educational models their institution is looking to expand or add within the next 3 years (selecting all that apply):**




**Source:** *Inside Higher Ed*/Hanover Research 2026 Survey of College and University Presidents

## Technology Infrastructure

Institutions must build technology infrastructure and systems that can move at the speed of a frenetic era and remove friction for learners of all ages and needs. For some, that will mean cleaning, organizing and making accessible the institutional data that enable dynamic decision-making. This can include curriculum catalogs, campus infrastructure usage and a wealth of student success metrics that can guide everything from program sunsetting and investment to student well-being checks and academic advising. Student Voice surveys have found that nearly half of students lack key academic guidance, and that 19 percent of students say channeling more resources to academic advising so they can get more help from their adviser would most boost their academic success. Some 28 percent say the same of new and/or clearer program maps and pathways. Additionally, just 41 percent of students indicate that their institution offers course delivery options that meet their learning needs and/or scheduling requirements very well.

Clean, accessible data can enable the use of AI tools that give faculty and staff more time for the human parts of their role, says Means. If advisers can effortlessly reference their student's history, ambitions and course requirements, they can "just go into the meeting with the student and focus on them, ask them questions, interact with them," she explains, adding that speech-to-text transcription tools can also save time writing up such meetings.

AI can also help develop students' career readiness. At the University of South Carolina, pharmacy students use chatbots to practice pharmacist-patient interactions without embarrassment, says Adrian Anderson, an AI educator there, while integrations with learning management systems enable faculty feedback. Students' exposure is inspired by the established but highly regulated use of AI in medical settings, he adds: "What we can do here is train them on the ethical frameworks—the pros and cons of using the tools in certain manners—given the discipline they're working in."

> **I'm taking a crawl, walk, run strategy.**
>
> **Kent Devereaux**, president of Goucher College

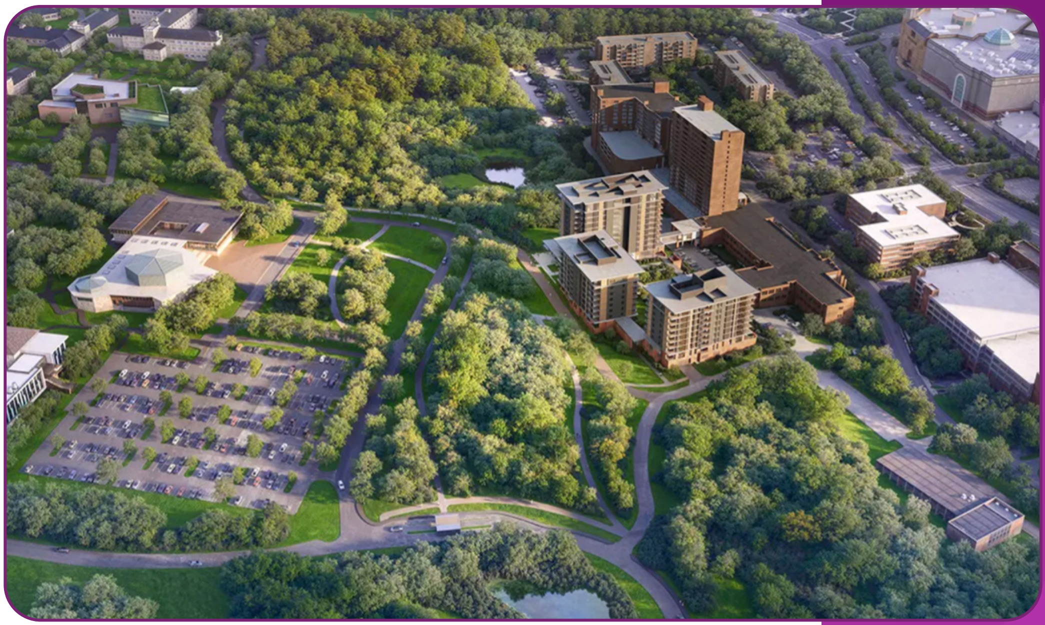
Regarding the technology infrastructure to support alternative credentials, in particular, 23 percent of college chief technology officers surveyed by *IHE* this year report increased investment in alternative credentials and microcredentials. But just 15 percent describe their institution's technology support for nondegree pathways as robust.

## Institutional Identity

As students move in and out of institutions throughout their careers, adapting to a labor market disrupted by AI and other technologies, the sum of their interactions can tip from two- or four-year transactions to a lifelong relationship. For community colleges, this changing identity could turn them into "regional talent hubs," says deLaski, citing NOVA's retraining programs aimed at laid-off federal workers in Washington as an example. Four-year institutions, and research universities, in particular, can also leverage their relationships with employers to expand their lifetime offer to students; deLaski points to recent work on "dual-speed" models—which run "career-launching" operations alongside more entrepreneurial "career-sustaining" programs, like the University of California, San Diego, and its Division of Extended Studies—as potential frameworks. "Research universities that act now—naming career sustaining as a core mission, investing in the units already doing this work, and holding themselves accountable for learner outcomes—will restore their social contract with the public and secure their own futures," reads that paper published by Learning Society, an initiative anchored at Stanford University.

Goucher College, a liberal arts institution in Maryland that sends all its students on study abroad programs, took an almost 20 percent hit to enrollments during the pandemic, when travel was impeded. Now demographic pressures across the Northeast, where the enrollment cliff is especially steep, threaten enrollments over the coming decades, says President Kent Devereaux. In response, the college has turned to its campus neighbor, a long-standing, nonprofit retirement community, for an expansion of adult education.

Residents of the community may audit two or three eight-week classes per semester and have full access to campus amenities. These intergenerational offers are tailored to make the most of auditors' experiences, covering topics such as the Civil Rights Movement. "You actually have people who were sitting on lunchroom counters in the 1960s," Devereaux says. The college estimates that just 15 percent of current residents will audit classes at Goucher, but a new development being built on leased college land will add another 230 residents in their 70s, all of whom will participate in college life—including some on study abroad programs. For Devereaux, this unusual set-up is also a "beachhead" for expanding Goucher's lifetime education offer to its 12,000 alumni over 55. "I'm taking a crawl, walk, run strategy," he says, adding that he hopes to expand lifetime learning over the next decade up to 5,000 students, including alumni and retirees from the nearby area. ■



The Goucher College and Edenwald Senior Living University Retirement Community. Credit: Goucher College.

# Key Takeaways for College Leaders

The forces reshaping higher education—from demographic change and AI to evolving learner expectations—are also reshaping what institutional leaders prioritize:

- **Improving affordability—and helping students see it.** Cost remains one of the biggest barriers to enrollment and public confidence in higher education. Institutions should look beyond tuition alone by improving price transparency, expanding affordable pathways and helping students understand and feel their return on their investment, sooner.
- **Designing for a multigenerational student population.** Higher education is increasingly serving learners across the lifespan, from high school students and recent graduates to working adults and retirees. Institutions will need programs, services and campus experiences that meet the needs of learners at different life stages and encourage intergenerational engagement.
- **Building more flexible pathways.** Learners increasingly want options that fit around work and family responsibilities. Stackable credentials, credit for prior learning and flexible scheduling can help institutions meet those expectations. Adult learners, career changers and returning students represent increasingly important populations and pathways must reflect their needs.
- **Strengthening connections between education and work.** Students are placing greater emphasis on career outcomes and workforce relevance. Institutions may need to provide clearer pathways from education to employment through work-based learning, employer engagement, faculty upskilling and other kinds of partnerships.
- **Investing in workforce-aligned credentials.** Demand is growing for shorter-term credentials, pathways such as apprenticeships and stackable options that can build toward degrees over time. Institutions should consider how their credential offerings align with dynamic learner and workforce needs.
- **Modernizing technology and data infrastructure.** Clean, accessible data and integrated technology systems can improve institutional decision-making, streamline student support such as advising, and enable more effective use of AI tools—including for new pathways.
- **Preparing students for an AI-augmented workplace.** Beyond teaching students how to use AI tools, institutions will need to help them develop the critical thinking, communication and problem-solving skills and ways of knowing within disciplines that AI is designed to enhance, not replace.
- **Deepening community partnerships.** Strong relationships with not only employers, but school districts and community organizations can help institutions strengthen trust and even workforce pathways—and demonstrate value to prospective students and the public.
- **Rethinking the alumni relationship.** As learners increasingly need to gain new skills and credentials for the evolving workplace, institutions may increasingly view higher education as a lifelong relationship with learners, rather than a one-and-done experience. ■

# Conclusion

Higher education is facing an unusual convergence of economic, regulatory, technological and demographic change. Together, these forces are challenging long-held assumptions about who colleges serve, how learning is delivered and what value and mission mean.

The complexity of the current moment demands diverse responses from institutions. And, as waves have broken over parts of the sector, some institutions have responded with creative solutions that could serve the whole for decades to come.

Experts interviewed for this report see opportunity alongside disruption. Institutions are already rethinking credentials, expanding pathways for adult learners, strengthening employer partnerships and using technology to create more flexible, learner-centered experiences. As colleges increasingly serve students across multiple stages of life, simultaneously, those best positioned for the future will adapt while remaining focused on their core mission of expanding educational opportunity. ■

# About the Author

Ben Upton is a freelance journalist based in Washington. He served as *Times Higher Education*'s Europe reporter between November 2021 and October 2023 and previously covered European research policy for *Research Professional News*. Before graduating from City, University of London's journalism school in 2017, he worked in academic publishing and taught at a private university in Wuhan, China.

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