



Whiteboard
Advisors

Education Insider

ESEA Timing, Common Core Testing Consortia, Student Data Privacy, Competency-Based Education, and Private Sector Involvement

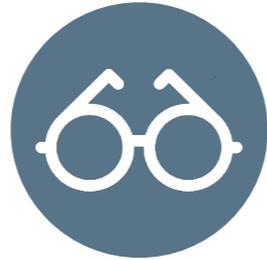
March/April 2015

Why Education Insider?

An Insider look at education policy from leaders across the country



Survey Insiders



Analyze Results



Report Insights



Drive Action

About Education Insider

Education Insider is a monthly report that uses a proprietary model to cut through the noise and provide real-time insights on national education policy trends, debates, and issues—from a small group of approximately 50-75 Insiders who are close to the process. We conduct a survey of these influencers, which includes their candid opinions and insights, to provide a unique perspective on K-12 and higher education. The views expressed do not necessarily represent the viewpoints of Whiteboard Advisors or any of its employees.

Who Are the Insiders?

Influential leaders who are shaping federal education reform, including individuals who have served or are currently serving as key policy and political “insiders,” such as:

- Current and former White House and U.S. Department of Education leaders;
- Current and former Congressional staff;
- State education leaders, including state school chiefs and former governors; and
- Leaders of major education organizations and think tanks, as well as other key influentials.

Table of Contents

A look at what's ahead

Executive Summary	4
Tracking Measures	
Congress & The Administration.....	7
ESEA Timing.....	9
HEA Timing.....	11
Common Core Testing Consortia.....	13
K-12 Policy	
Student Data Privacy.....	16
Common Core Testing.....	20
Higher Education	
Competency-Based Education & Accreditation.....	22
Market Pressures.....	26
Sweet Briar & Financial Strength.....	27
Financial Aid Simplification.....	29
College Ratings.....	30
Unionization.....	31
Special Section on the Private Sector	
Presidential Hopefuls.....	33
Opportunities.....	34

Executive Summary

A snapshot of key insights from our March/April survey

Data Snapshot

28% of Insiders approve of the way Congress is handling education. **One-third** approve of the Administration's actions regarding education policy.

52% of Insiders now believe ESEA will not be reauthorized while President Obama is in office. **80%** say the same for HEA.

61% of Insiders think PARCC is on the right track. Slightly more—65%—think SBAC is on the right track.

54% of Insiders believe student data privacy legislation will be enacted before Obama leaves office. **28%**, a plurality, see a broad-base of support for federal action on the issue.

Congress & The Administration

Our March/April survey saw slight upticks in the approval of Congress and the Administration. Many Insiders point to what they view as earnest actions by policy makers around ESEA reauthorization, but continue to see political gridlock as a significant roadblock to meaningful legislative action.

ESEA & HEA Reauthorization

A majority of Insiders now believe that ESEA will not be reauthorized while President Obama is in office. Insiders are even less hopeful for action to renew HEA.

Common Core Testing Consortia

The implementation of the new PARCC and SBAC tests continue to go relatively smoothly despite legislative efforts in 19 states to repeal the Common Core standards and attempts by a handful of states to pull out of the testing consortia.

Student Data Privacy

Insiders are optimistic about the prospects for federal action to address student data privacy concerns. Insiders also believe there is strong support from a diverse group of stakeholders for addressing the issue.

Executive Summary, continued

A snapshot of key insights from our March/April survey

Data Snapshot

Insiders are divided on the likelihood of alternative forms of accreditation emerging. **43%** see it as likely while **39%** see new models as unlikely.

64% of Insiders believe small private colleges are most exposed to pressure from new higher education models.

61% of Insiders think a bill to streamline federal financial aid is likely.

3 in 4 Insiders do not think it is likely that ED will implement two systems for college ratings by September.

Competency-Based Education & Alternative Accreditation

With Southern New Hampshire University's President Paul LeBlanc taking on a 3-month appointment at the U.S. Department of Education, we asked Insiders to weigh in on the future of competency-based education (CBE). Respondents see CBE programs expanding in the future, but caution that programs must focus on quality and flexibility—not just cost-cutting. When asked about the future of alternative forms of accreditation, Insiders agree there is a need for changes to the current system, but are unsure about the best mechanisms to accomplish that.

New Higher Education Models

In light of Sweet Briar College's announcement that it would be closing its doors this summer, we asked Insiders about the future of higher education institutions. Insiders say new higher education models are putting the greatest pressure on small private colleges, which could lead to additional closures for these institutions.

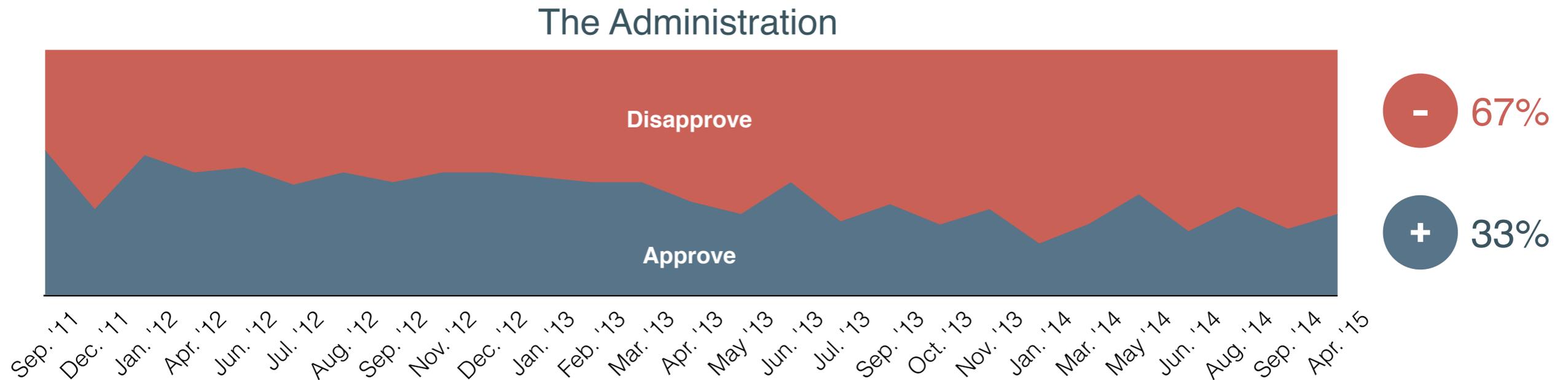
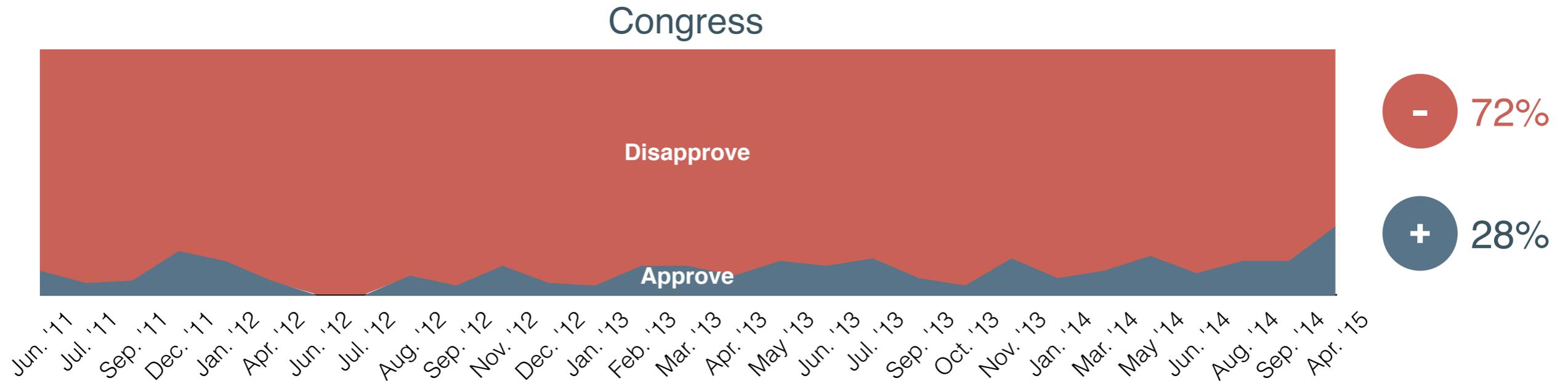
Student Financial Aid Simplification

Insiders agree that there is broad bipartisan support for action to address the complex student financial aid process. However, they see a focus on other education policy issues as likely preventing policymakers from moving forward with legislation.

Tracking Measures

Approval of Congress & The Administration

Slight upticks in approval for both Congress & the Administration



Q: Do you approve or disapprove of the way CONGRESS/THE ADMINISTRATION is handling education?

Approval of Congress & The Administration

Insiders offer comments on Congress & The Administration's handling of education policy

On Congress

“There's low-hanging fruit to be had on ESEA and HEA, yet **commonsense changes don't stand a chance**. Way too polarized.”

“**Kline and Alexander are trying to get something done**; lots of forces against them, however.”

“Both Kline and Alexander are stepping up to the plate trying to fix broken laws and **rein in the excesses of this lawless administration**.”

“You can't approve of their inaction. **They have more federal education bills past-due for reauthorization than are current**, and funding support for federal education leaves much to be desired.”

“Neither—there is really **not much to approve or disapprove of** to this point.”

“**The House and Senate have entirely different approaches to ESEA reauthorization** and negotiating ESEA issues (as in the House won't negotiate.) But because the House is a part of Congress, they may win the day and nothing will happen.”

Note: Some comments have been edited for clarity.

On The Administration

“They are **out of touch with the realities of state governments**.”

“I have deep concerns for an administration and its agencies that move federal resources...in a way that makes them **available to some, but not all, schools and students** (*i.e.*, formula and reauthorization vs. competition and waivers).”

“Waivers were a short-term fix that could have **profoundly negative consequences over time**.”

“Taking the law into one's own hands is **understandable yet unconstitutional**.”

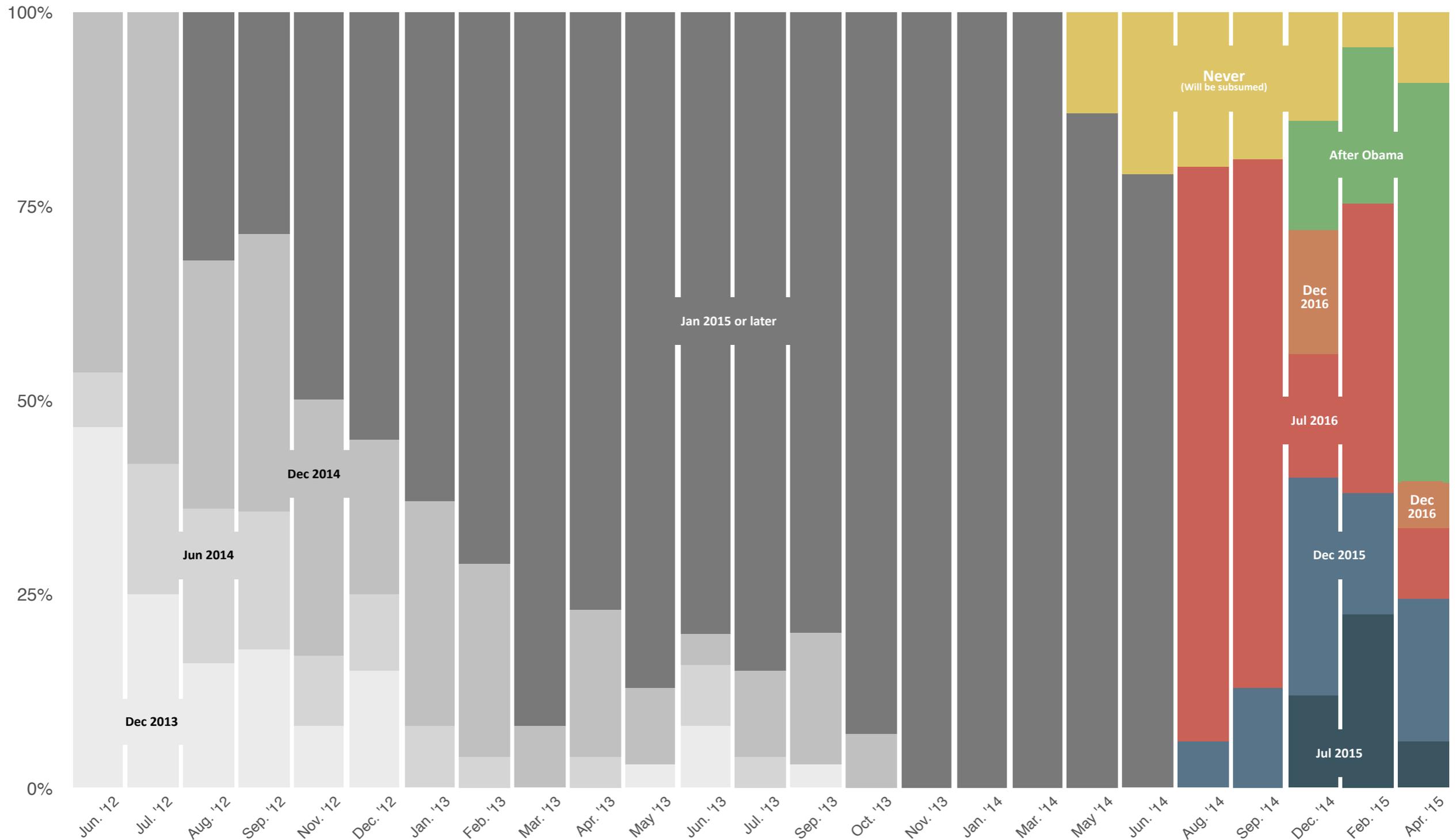
“Congress is trying to get things done. Meanwhile the Administration is not. In fact, **all they want to do is put roadblocks in the way**.”

“...they had **no choice** but to go to waivers.”

“At least **the Administration is keeping states moving forward** while Congress dithers for years on end.”

ESEA Reauthorization Timing

52% of Insiders now believe ESEA reauthorization won't happen while Obama is in office



ESEA Reauthorization

Insiders offer comments on the timeline for renewing ESEA

Getting Something Done

“I think **Obama & Duncan will be starved for a late-term accomplishment**, which could lead them to nudge a Democratic coalition to join more moderate Republicans around a proposal that Alexander and Kline put together.”

The Optimists

“**Alexander is showing how to lead and Murray is a good partner for him.** They'll get major things done.”

“December 2015, if only because that's a mere 8 years past due. Or, more seriously, **the odds are the best I've seen in several years**, and I remain (however naïve) somewhat optimistic that maybe Congress will get its act together.”

Compromise Is Hard

“Just hard to see how both Houses can come together in a time when **compromise is a dirty word.**”

“It may move along pretty far, but in the end **right wing opposition will kill it.**”

“The difficulty is getting a bill that **Congress will approve that the Administration will sign** into law.”

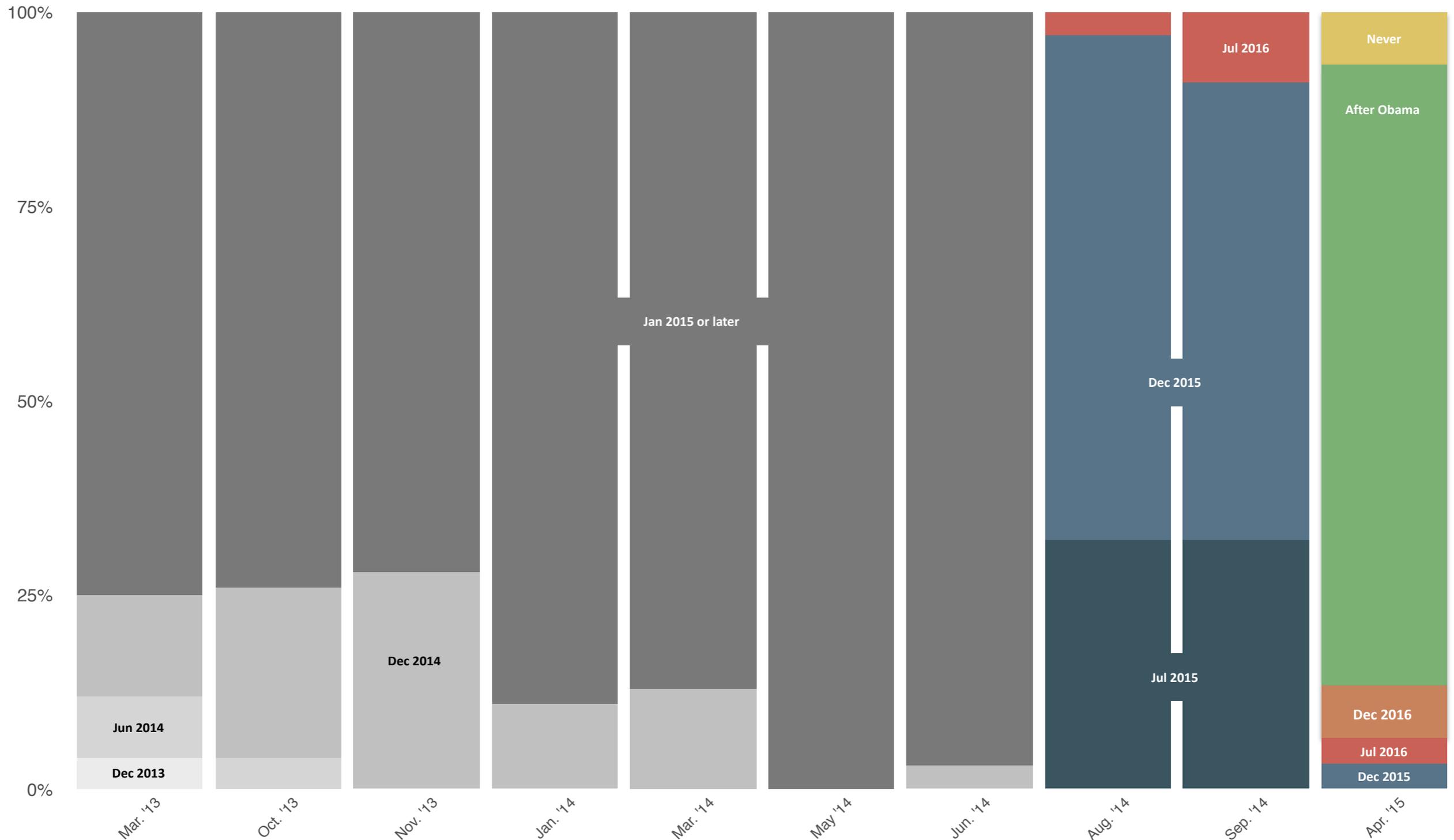
Campaign 2016

“While current Republican leadership wants to get ESEA reauthorized, **it will increasingly get tied up in presidential politics and candidates** (several of which are in the Senate or in State Houses) will use the federal role in education (and especially ESEA) as a wedge issue within the Republican primaries.”

“**They want it done before 2016 Presidential race.**”

HEA Reauthorization Timing

80% of Insiders believe HEA will be reauthorized after President Obama leaves office



HEA Reauthorization Timing

Insiders offer comments on the timing for HEA reauthorization

Bad Timing

“**The clock is running out** on this term, and ESEA has mucked up the works.”

A Pressing Need

“**There is a greater chance of HEA moving** because everyone is frustrated with the lack of accountability in higher education, the huge student debt crisis, and limited transparency (especially around post-secondary outcomes).”

Full Plate

“Too much on Congress’ plate and it’s not going to happen during a Presidential election year. **The sad part is [Congress] could at least address the financial aid piece this year** since there is agreement on most of the parts.”

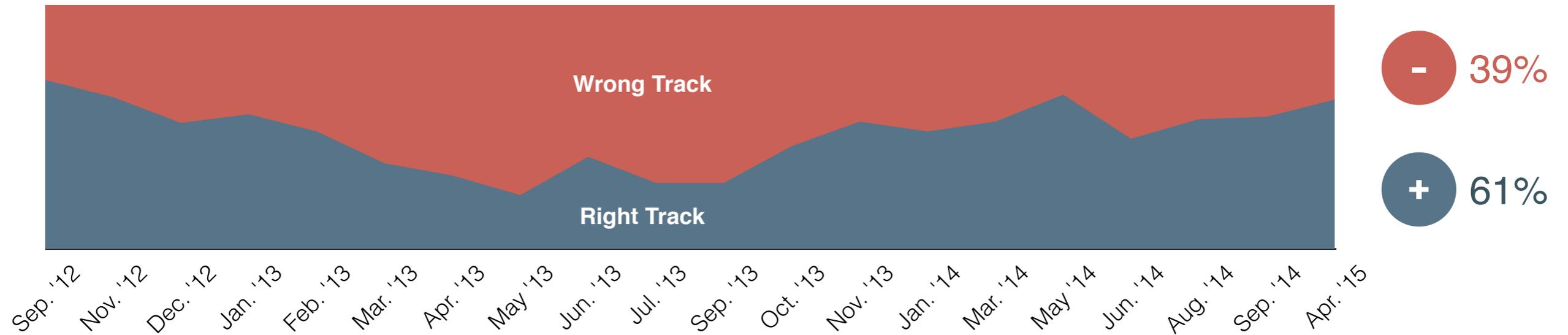
Full Plate, cont.

“They’ll most likely run out of time to do this. There are plenty of things in the way of considering HEA (ESEA, budget and appropriations, debt ceiling) and the November 2016 election (an election with no incumbent) means that not too much will get done next year. **HEA is long and complex and it is likely to require a full two year cycle.**”

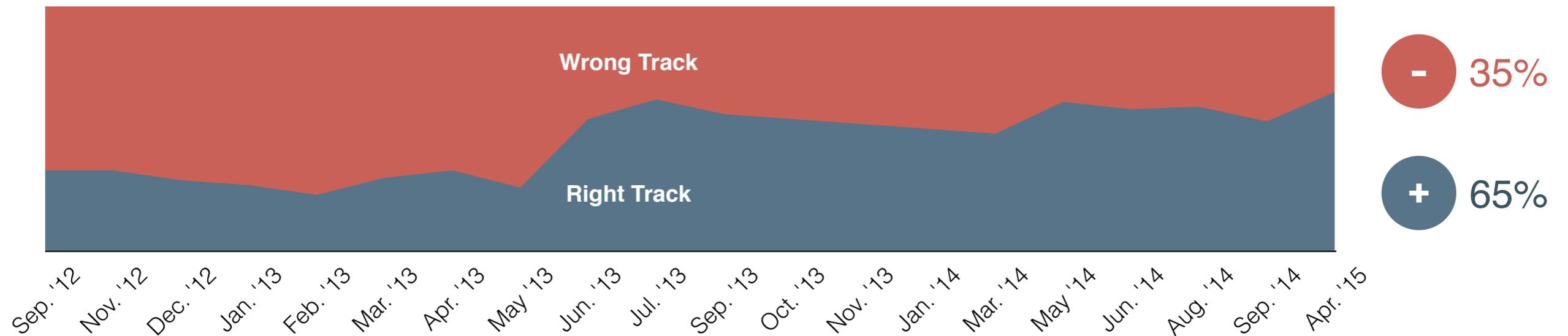
Common Core Testing Consortia

Insiders believe that the testing consortia are on the right track

PARCC



SBAC



Common Core Testing Consortia

Insiders offer comments on the Common Core testing consortia

Good News So Far

“Tests are being **well-implemented**; opt-out is below 3%; few glitches; and students and teachers are saying they like the tests.”

Results Driven

“If the PARCC and SBAC tests don't provide meaningful feedback on student performance to parents and teachers that can inform instruction on an ongoing basis, these tests are likely sunk. While things went fine technically (for the most part), the disruption to instruction is no small thing and **PARCC/SBAC need to be able to show it was ‘worth it.’**”

Public Relations

“Think things are ugly now with the opting out? There's likely to be some kind of PR-nightmare glitch in administration or scoring or reporting before this cycle is over. **And that's not even accounting for the public outcry when the results show big drops.** Bad, meet Worse.”

State Challenges

“I am still concerned that **state legislatures will force more states to withdraw.**”

“They're on the right track, it's **how the assessments are or are not being incorporated into state policy** that is more problematic.”

PARCC Problems

“I think **PARCC has an unclear path to financial sustainability**, and unless they take that very seriously and adjust course, they may not be around in 2016.”

“**They've withstood the politics so far**, more damage to PARCC than SBAC. SBAC has a base to build from if they can get the assessment piece right (irony deliberate).”

K-12 Education

Student Data Privacy Legislation

54% of Insiders believe a student data privacy bill will be enacted under Obama's watch

Background

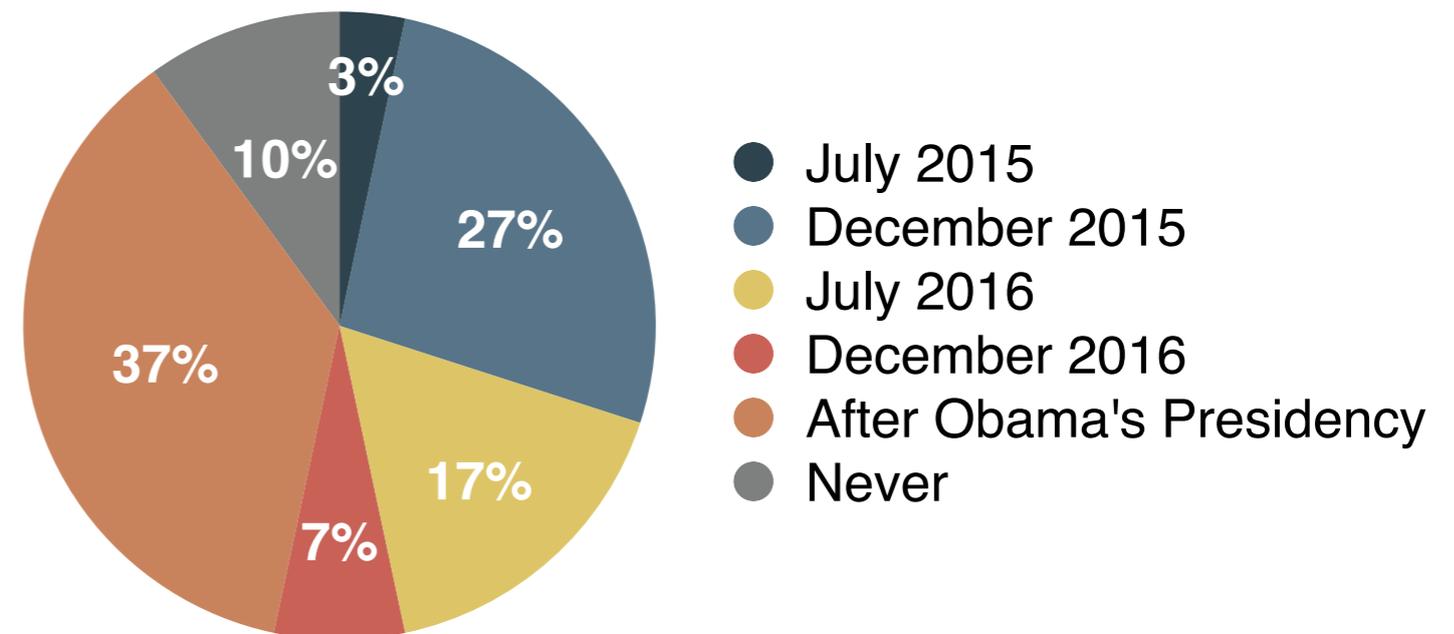
The proposed Student Digital Privacy and Parental Rights Act of 2015 continues to circulate in Congress in draft form. Despite hints that a draft would be publicly released on March 23, a final version has not yet been made public. The bill, co-sponsored by Rep. Jared Polis (D—CO) and Rep. Luke Messer (R—IN), has received input from the White House and a number of stakeholders—including regulators, industry leaders and advocacy groups.

Insiders Weigh In

Insiders—by a small margin—continue to believe a federal law will be put into place before December 2016, citing support on both sides of the aisle and urgency to enact safeguards as the key drivers of the legislation.

By The Numbers

Insiders are slightly less optimistic about the prospects for student data privacy legislation compared to their outlook in February. 54% now believe we will see legislation before Obama leaves office, down from 62% just a month ago.



*Numbers do not add up to 100% due to rounding.

Q: By about when do you believe a new federal law on student data privacy will be put into effect?

Characterizing Support For Student Data Privacy

Insiders perceive broad-based support for the issue generally, not specific policy proposals

Insiders Weigh In

Insiders are split on how to best characterize support for student data privacy legislation. Nearly 3 in 10 say support for legislation is broad-based. A similar number of Insiders somewhat agree, but make an important distinction between support for the *issue* of student data privacy versus support for the *current legislative proposals*. Taken together, these two groups show that there is in fact support from a large and diverse group of stakeholders for federal action on this issue, though policy specifics will still need to be worked out.

By The Numbers

28% of Insiders believe there is broad-based support for legislation related to student data privacy. Conversely, 17% do not believe there is broad-based support. Only 7% believe the primary supporters are parents.



*Numbers do not add up to 100% due to rounding.

Q: How would you characterize the support for the new federal student data privacy legislation?

Evaluating The Current Privacy Bill

Insiders believe the current proposal at least partially achieves key goals

Insiders Weigh In

We asked Insiders to evaluate the extent to which the current draft proposal of the Student Digital Privacy and Parental Rights Act of 2015 being circulated in Congress achieves the primary aims for federal action.

Q: How would you characterize the extent to which the proposed federal education privacy bill does the following?

Not at all

Partially

Entirely



Allow for appropriate use of data by schools and educators



Protect privacy of student data



Protect the rights of parents with regard to privacy



Constrain opportunities for educational innovation through online tools for students, teachers and schools



*Numbers may not add up to 100% due to rounding.

Important Issues In The Data Privacy Debate

Insiders offer comments on what really matters for student data privacy

An Ideological Challenge

“There is a tendency on the part of advocates to talk of privacy concerns as if they are a technical problem to be solved. **But these are, at root, political and ideological disagreements that are deeply personal.** That makes common ground difficult to come by.”

Balancing Act

“**It's tough to find a balance between encouraging innovation and protecting privacy.** It is even tougher when the conversation becomes an emotional exchange between people who have little desire to listen.”

Not For Sale

“...need to ensure that **student data is protected and not for sale.**”

“...blocking advertising and marketing to students and putting into place some...**real penalties for school officials and vendors who commit significant violations** of privacy law.”

What Is This Really About?

“I think that some of the flurry of activity surrounding student data and privacy is spill over from the Common Core standards/assessments movement, however misaligned or inappropriate. **The fear of big brother is carrying over and unnecessarily stirring up fear among parents.** It's important to remember that student data is not new, and the odds are really good that your child's data now is far more secure than yours was, stored in a manila folder in a filing cabinet.”

“Parental rights is a legitimate concern but **it's being hijacked by advocates who just don't like ed tech or data-based accountability.** That's confusing the issue and threatens to undermine potentially effective interventions and supports that could help some students.”

The Future of Common Core Testing

PARCC and SBAC are here to stay, according to Insiders

Background

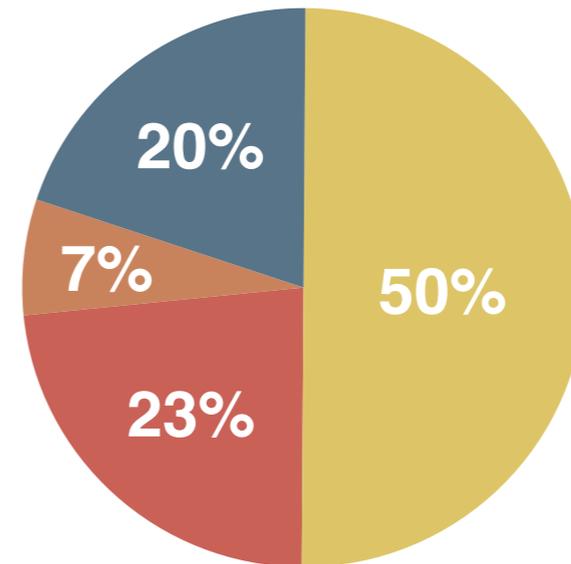
State efforts to repeal the Common Core standards have been largely unsuccessful. To date, bills have been introduced in 19 states to repeal the standards this legislative session, though none have succeeded. State officials critical of Common Core are now targeting Common Core-aligned tests and looking to pull out of the testing consortia, PARCC and SBAC. There are currently 28 states participating in one or both of the consortia, though some states are looking to replace the tests with homegrown assessments.

Insiders Weigh In

Despite recent challenges to the testing consortia, a majority of Insiders expect that 20 or more states will continue to be a part of the testing consortia in the coming years.

By The Numbers

70% of Insiders believe 20 or more states will continue to participate in one of the two Common Core testing consortia, though no one believes “nearly all states will participate.” 30% believe fewer than 20 states will remain in the next 2-3 years.



- Nearly all states will participate in one of the two consortia
- At least 30 states will participate in one of the two consortia
- At least 20 states will participate in one of the two consortia
- At least 10 states will participate in one of the two consortia
- Fewer than 10 states will participate in one of the two consortia

Q: In light of recent challenges to states' participation in the Common Core testing consortia, what do you believe about the prospects for the consortia over the next 2-3 years?

Higher Education

Paul LeBlanc At The Department Of Education

60% of Insiders believe LeBlanc's 3-month residency will be impactful

Background

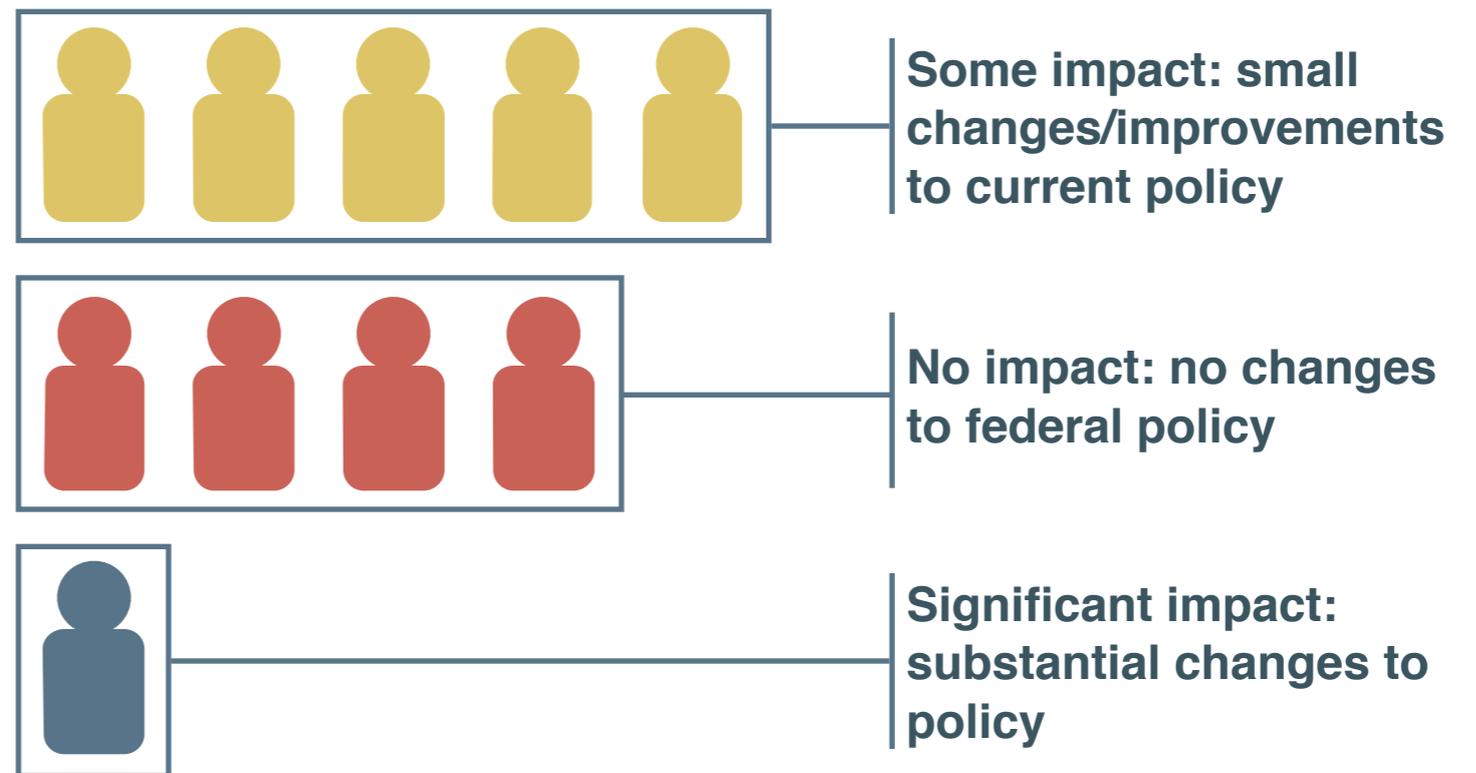
President Paul LeBlanc of Southern New Hampshire University has led the institution's push to become a leader in online and competency-based education (CBE). LeBlanc was tapped by the U.S. Department of Education (ED) for a 3-month appointment as Senior Advisor to Under Secretary Ted Mitchell to "[look] for ways to help colleges try new approaches with unconventional academic programs," according to Inside Higher Ed.

Insiders Weigh In

3 in 5 Insiders believe LeBlanc's time at ED will have at least some impact on the future of competency-based learning. 40% caution, however, that his time is too short and will likely result only in ideas and conversations on the topic instead of the creation of programs and policies.

By The Numbers

Approximately 5 in 10 Insiders (52%) believe LeBlanc will have "some impact" in his time at ED. Nearly 1 in 10 (8%) believe his time there will have "significant impact." 40% of respondents believe that his time at ED will have no impact on federal programs and policy.



Q: What will be the impact on competency-based education of Southern New Hampshire University's President Paul LeBlanc's three-month residency at the Department of Education?

Alternative Forms of Accreditation

Insiders are split on the prospects for alternative forms of accreditation

In Their Own Words

“I think we’ll see a **pilot or demo project** that moves in this direction, either independently or as part of HEA.”

“...the **higher ed blob** [sic] will not permit it.”

“There is movement and **the beginnings of acceptance for accreditation reform.**”

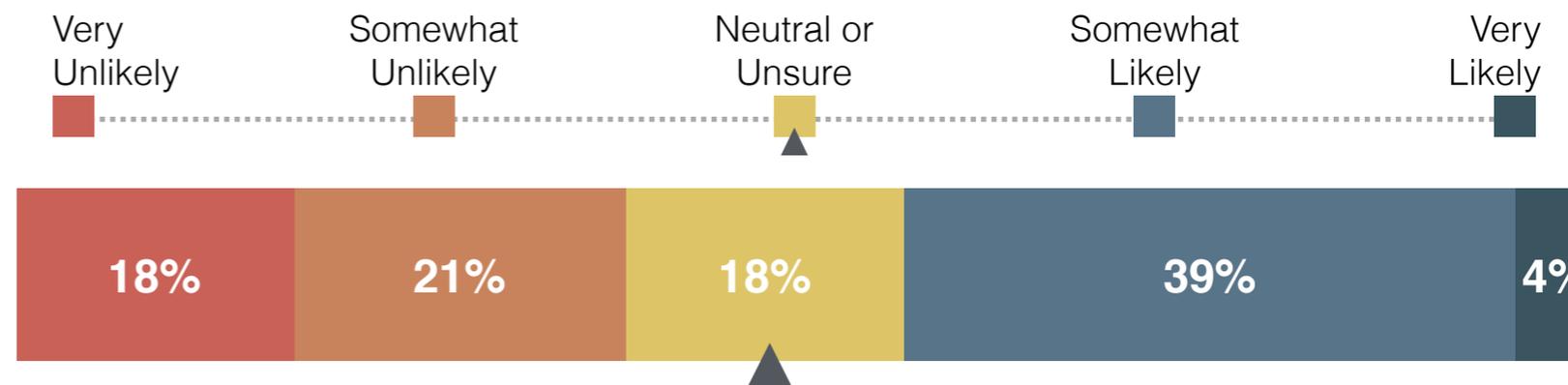
“Policy makers like to complain about accreditation—but if and when they decide to really examine the actual facts, they realize that **there is no real alternative.**”

“...not necessarily that traditional accreditation will be reformed, but that **alternative providers or alternative accreditors may be allowed to exist.**”

“Course accreditation is actually pretty easy. The **hard part is decisions about making non-traditional providers eligible for student aid programs...**”

By The Numbers

Insiders are undecided about the future of alternative forms of accreditation. 43% say new forms are likely while 37% are not convinced. 18% are unsure. While many commenters agree that change is necessary given the rapid growth of new post-secondary education models, others believe that determining the right mechanisms at the federal level is too complex and would result in sub-par alternatives to the current system.



Q: How likely is the creation of alternative forms of accreditation, including course-level accreditation, over the next 2-3 years?

The Need For Accreditation Reform

2 out of 3 Insiders believe the current system of accreditation needs to change

In Their Own Words

“The current approach is totally flawed and **from an earlier era.**”

“I'm not sure "course-level" is the key point here; **it's about need to encourage new entrants to the market who do not have legacy costs or routines of traditional institutions.**”

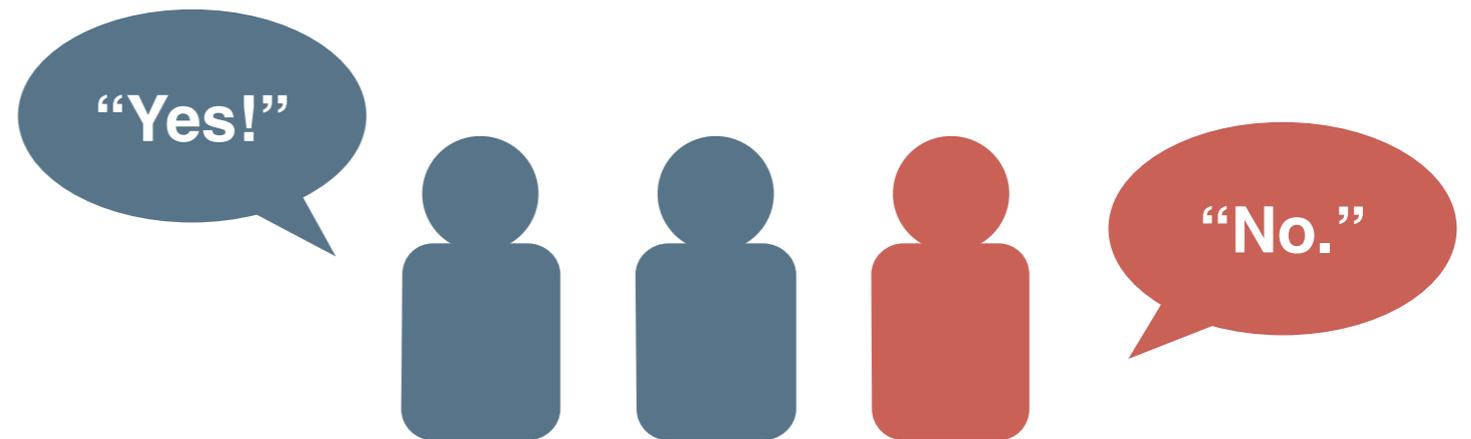
“...very **unclear the feds are the right people** to do it.”

"Should be left to the states or addressed by a consortia. **Can't trust federal processes right now.**"

"I absolutely believe that **alternative providers who can prove a pretty high level of quality and outcomes should receive financial aid.** The rub is defining with those outcomes are....If we just leave it up to the accreditors, which is what hasn't worked, we'll be in the same non-transparent mess we're in today (but with federal money flowing to additional crappy providers)."

By The Numbers

67% of Insiders believe there is a strong need for accreditation reform at the federal level.



Q: In your opinion, is there a strong need for accreditation reform at the federal level - specifically to include course-level accreditation and accreditation of non-traditional providers, for example?

Expansion of Competency Based Education

Insiders believe significant changes are on the way for competency-based higher education

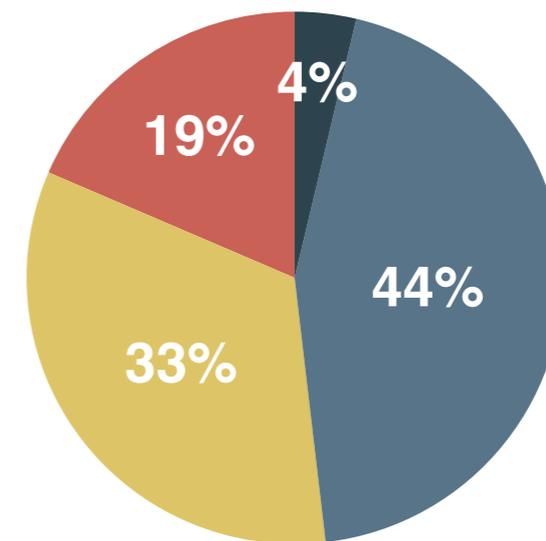
Insiders Weigh In

One of our Insiders sums it up well:

"The demand and interest in these programs are huge and growing. This is no longer an endeavor just for niche institutions...While I believe this will be a time of great opportunity for these programs, it is also a time of great risk. It will be very tempting for state and federal policy makers to see CBE simply through the lens of cost savings. If that's the lens, or the only lens, things will devolve pretty quickly. The real promise of CBE is around transparent, knowable quality (which is sorely lacking in the rest of higher education)."

By The Numbers

96% of Insiders believe CBE will see significant changes in the near future. Of those, 52% believe those changes will be either "somewhat" or "very significant."



- Unchanged or insignificant changes to CBE programs
- Small changes to CBE programs
- Somewhat significant changes for CBE programs
- Very significant growth for CBE programs

Q: Generally, what is the outlook for the expansion of competency-based education programs in post-secondary education over the next 2-3 years?

Higher Education Institutions At Risk

Insiders believe small private colleges are most at risk given market pressures

Background

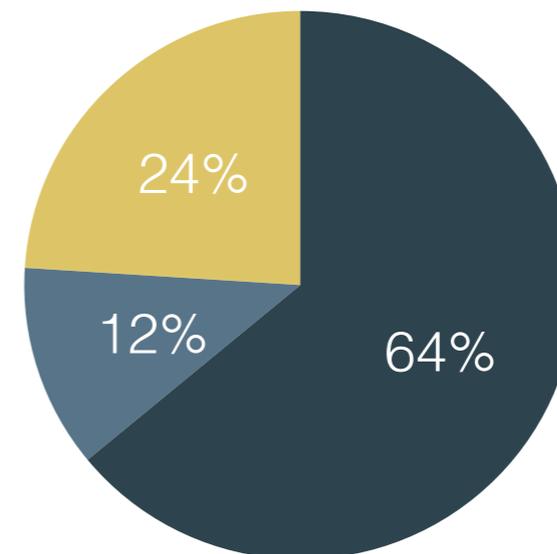
Recent changes in higher education—at established institutions and from alternative providers—are challenging the value proposition and viability of many existing institutions. In light of these potential threats, we asked Insiders which type of institutions are most exposed to the pressures of a changing landscape.

Insiders Weigh In

Insiders believe that small private colleges are most exposed to pressures from new models. Insiders cite rising program costs and increased competition, among other things, as the key pressures. Many believe that the financial models for these institutions will face tremendous pressure from lower cost competitors that offer similar value.

By The Numbers

Nearly two-thirds of Insiders believe small private colleges are most at-risk from outside pressure created by alternative models of higher education. Interestingly, a quarter of Insiders believe that regional public universities are at risk, likely due to anticipated decreases in public funding.



- Small private colleges (under 1,000 students)
- Medium private colleges (1,000-5,000 students)
- Regional public colleges
- Flagship universities

Q: When you consider the broad changes taking place in the post-secondary education sector, which type of institutions are most exposed to pressure from new higher education models and the resulting financial challenges of increased competition?

Sweet Briar College

A slight majority of Insiders think Sweet Briar's closing is indicative of a larger trend

Background

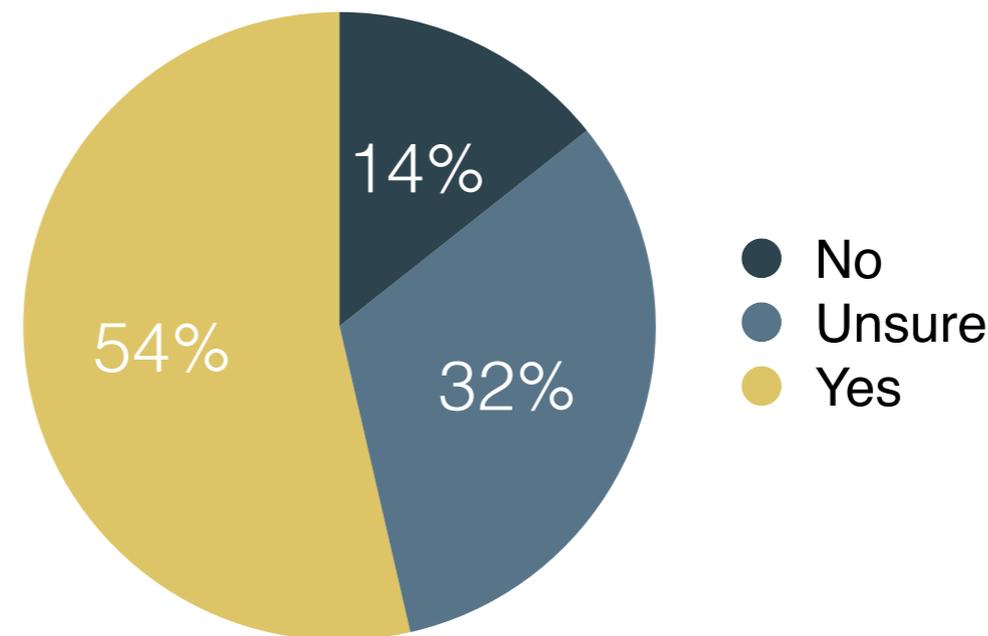
At the end of March, Sweet Briar College, an all-women's institution in rural Virginia, announced that it would close in August 2015. The decision caught many current students, faculty, and alumnae by surprise, and has fueled the discussion about the financial pressures facing small private colleges, particularly single-sex institutions, and their sustainability in the higher education marketplace.

Insiders Weigh In

Many Insiders believe that Sweet Briar's decision to close reflects a trend in higher education. However, according a number of respondents, this case is less a result of broader "disruption" but is specifically about declining demand for niche institutions, particularly rural, single-sex schools. Others note that one case cannot form the basis of a generalization.

By The Numbers

Over half of Insiders believe that Sweet Briar's closure is indicative of a larger trend for traditional colleges and universities. About a third say that they are unsure, while 14% see this as an isolated event.



Q: Is the decision to close Sweet Briar's doors indicative of a larger trend where other traditional colleges and universities will take similar actions given current market pressures?

The Financial Responsibility Composite Score

Insiders believe it is unclear whether ED needs a better measure of financial health

Background

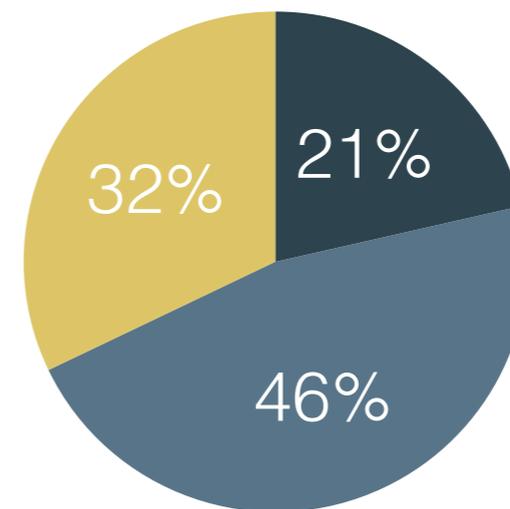
Shortly after Sweet Briar announced it would be closing, a number of higher education policy watchers pointed out that the school had the highest score on the Department of Education's Financial Responsibility Composite Score. This raised questions about the supposed connection between the financial challenges facing Sweet Briar and its decision to shut down.

Insiders Weigh In

46% of Insiders are unsure that the two events are related. A number of commenters question ED's ability accurately measure financial viability. Others suggest that Sweet Briar is unique as a rural, single-sex school and that financial health was not the main reasons for its decision.

By The Numbers

46% of Insiders believe it is unclear that ED needs a better measure of financial health despite recent evidence that the score may not be descriptive. Approximately 1 in 3 think the score needs to be improved, as evidenced by Sweet Briar's decision to close despite a strong composite score from ED.



- No – Sweet Briar's closure is unrelated to considerations in the Composite Score
- Unclear – The Sweet Briar event may be correlated to an ineffective Composite Score
- Yes – Sweet Briar's closure is an indictment of ED's Composite Score

*Numbers do not add up to 100% due to rounding.

Q: Sweet Briar received the highest score on ED's Financial Responsibility Composite Scores, meant to "gauge the fundamental elements of financial health of an institution." Does ED need a better measure of financial viability?

Student Financial Aid Simplification

61% of Insiders believe it is likely that legislation to simplify federal student aid would pass

Background

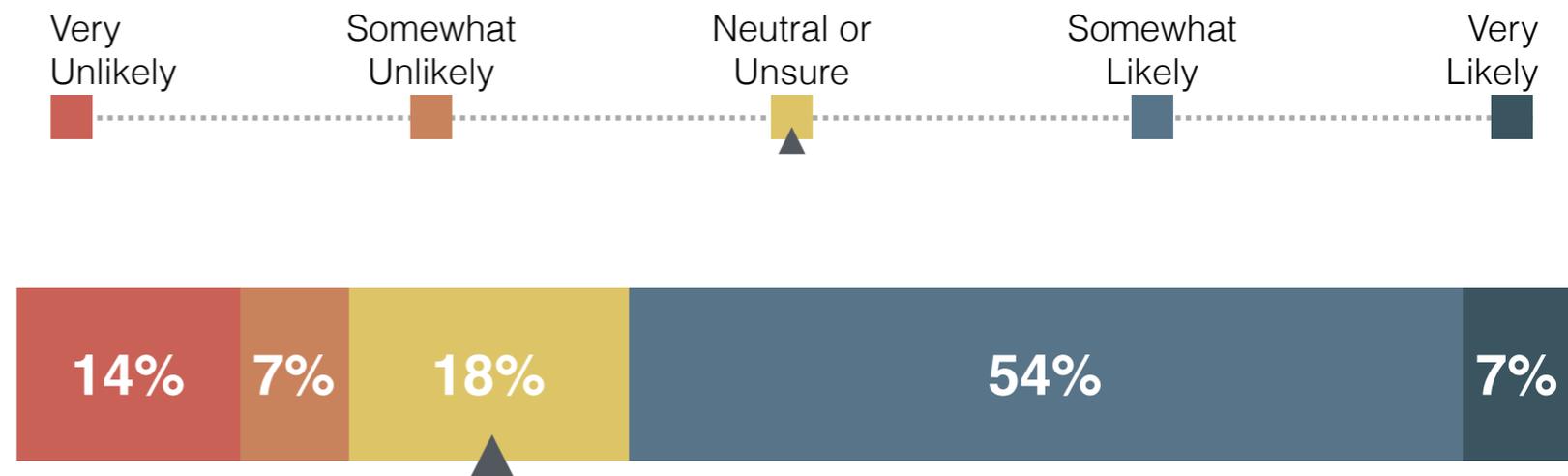
The issue of simplifying federal student financial aid has been on the political radar for some time. In light of the much-publicized growth in student borrowing and debt, the time may be ripe to revisit our current system of federal lending for higher education.

Insiders Weigh In

Insiders agree that legislation is likely, citing broad bipartisan support for updates to the federal student aid process. The “current reality isn’t working and is far too complex” according to one Insider. Commenters suggest the biggest challenge will be getting Congress to focus on renewing the Higher Education Act, which could be overshadowed by ESEA. Many point out that the renewal of HEA would require more time than is available given the looming 2016 elections.

By The Numbers

Approximately 3 in 5 Insiders believe that changes to federal financial aid are likely. Only 21% say changes are unlikely, citing the current political climate and competing legislative priorities as major roadblocks. 18% are neutral or unsure.



Q: What is the likelihood of passage for legislation to simplify/streamline federal student financial aid – including FAFSA, student loans and tax credits?

College Rating System(s)

A significant majority of Insiders believe two college ratings systems are unlikely

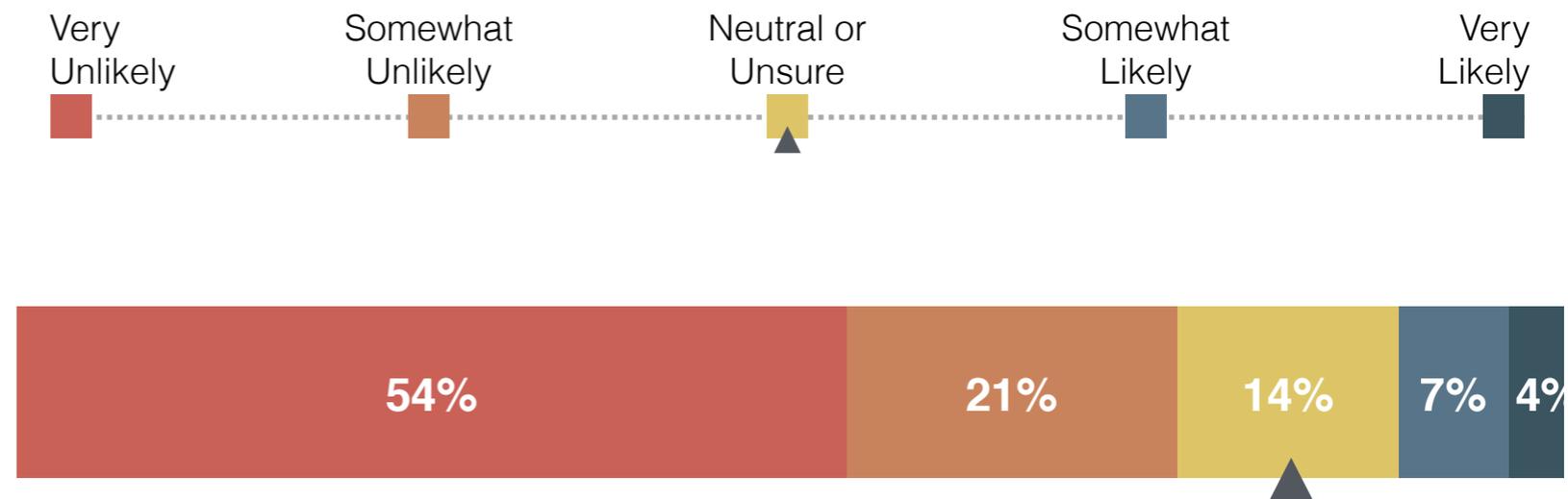
Insiders Weigh In

Insiders are very pessimistic about the prospects for two systems for federal college ratings—one focused on consumers and one targeted at researchers.

A number of respondents believe this type of rating system is not in ED's wheelhouse, and that the eventual design is likely to be both technically problematic and politically controversial. The technical challenges of creating these types of rating systems are significant, according to one Insider, especially when considering the volume of data collection necessary and the unwillingness of institutions to provide data that could be potentially damaging to their reputation.

By The Numbers

75% of Insiders think that ED will not have two college rating systems in place by September of this year, a majority of whom think it is "very unlikely." Only 11% think having the systems up and running by back-to-school time is likely. 14% are unsure.



Q: The Department of Education is considering two systems for college ratings - one designed for consumers and one for policy makers and researchers. How likely is it that the DOE will have two college-rating systems in place by back-to-school time?

Unionization at the University

56% of Insiders believe we will see more professors unionize

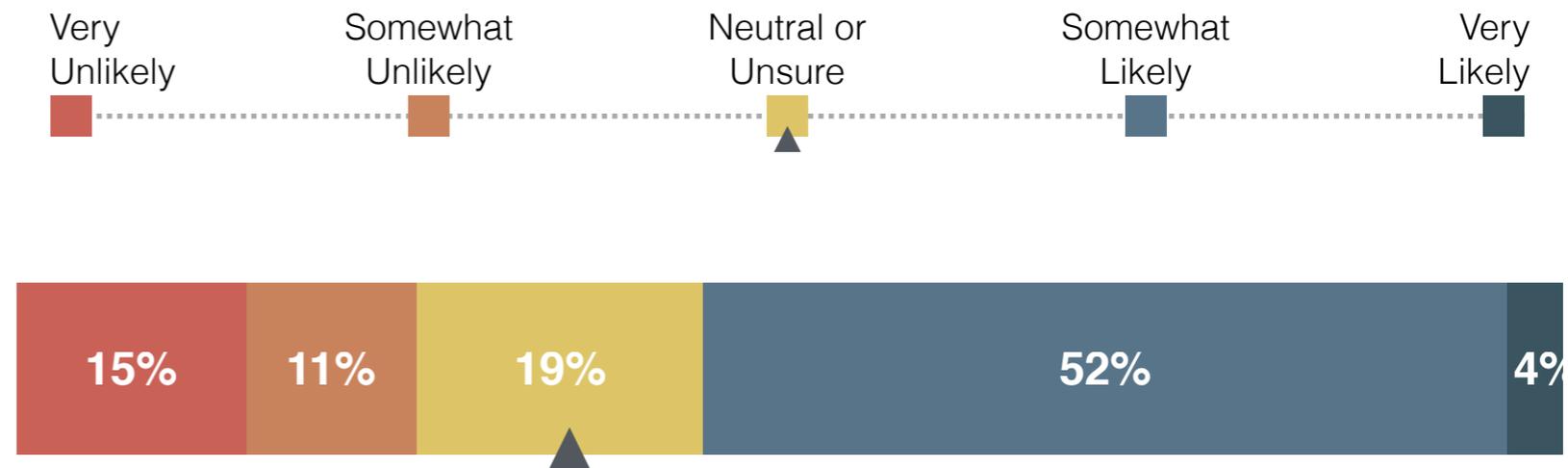
Insiders Weigh In

A majority of Insiders believe it is likely that we will see additional moves towards the unionization of adjunct professors, as recently happened at Robert Morris University, whose adjuncts have affiliated with the United Steelworkers Union.

Commenters point out that there is already much unionization in place, citing unionized graduate students and teacher assistants at many institutions—which gives precedence to future efforts in addition to the recent actions at Robert Morris. Insiders worry that this will add additional financial pressure to institutions. One commenter points out that existing education unions have struggled to support higher education faculty, which has created the vacuum filled, in this case, by United Steelworkers.

By The Numbers

56% of respondents think professors are likely to follow the lead of adjuncts at Robert Morris and pursue unionization. Only 26% believe these recent actions are not indicative of a larger trend that will lead to similar efforts at other institutions.

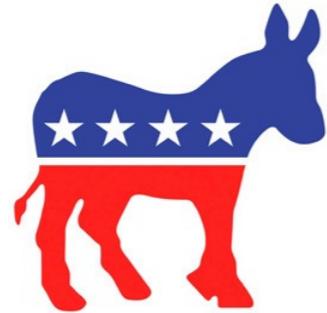


Q: Earlier this month adjunct professors at Robert Morris University in Pennsylvania voted to unionize and affiliate with the United Steelworkers. How likely is the unionization of adjuncts at Robert Morris to encourage similar moves at other universities?

Special Section on the Private Sector

Presidential Hopefuls & The Private Sector

Insiders take a look at which presidential hopefuls would be supportive of the private sector playing a role in K-12 and higher education



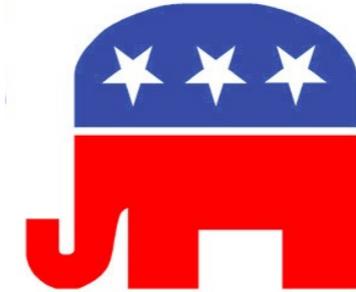
#1 — Hillary Clinton
Average Rank: 1.26



#2 — Joe Biden
Average Rank: 1.80



#3 — Elizabeth Warren
Average Rank: 2.91



#1 — Scott Walker
Average Rank: 1.73



#2 — Jeb Bush
Average Rank: 1.74



#3 — Marco Rubio
Average Rank: 2.50

Q: Please rank the following potential Democratic presidential candidates based on who would be friendliest to private sector involvement in K-12 and post-secondary education.

Opportunities for Private Sector Involvement

Insiders weigh in on opportunities for private sector involvement over the next 5 years

The following percentages represent the portion of respondents who chose each of the options below:

- | | |
|---|----------------------------------|
| 1 Student Data Management—71% | 6 Pre-Kindergarten Education—28% |
| 2 Digital Learning—61% | 7 Curriculum Development—21% |
| 3 Personalized/Blended Learning Tools—50% | T8 Teacher Prep/PD—7% |
| 4 MOOCs—36% | T8 Parent Communication—7% |
| 5 Alternative Higher Education Models—32% | 10 Classroom Management—4% |

Q: Which of the following areas of education present the best opportunities for private sector involvement over the next 5 years (please choose 3)?



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