



COMPREHENSIVE SCAN

YOUR DREAMS OUR PLAN

2018-2022 STRATEGIC PLAN

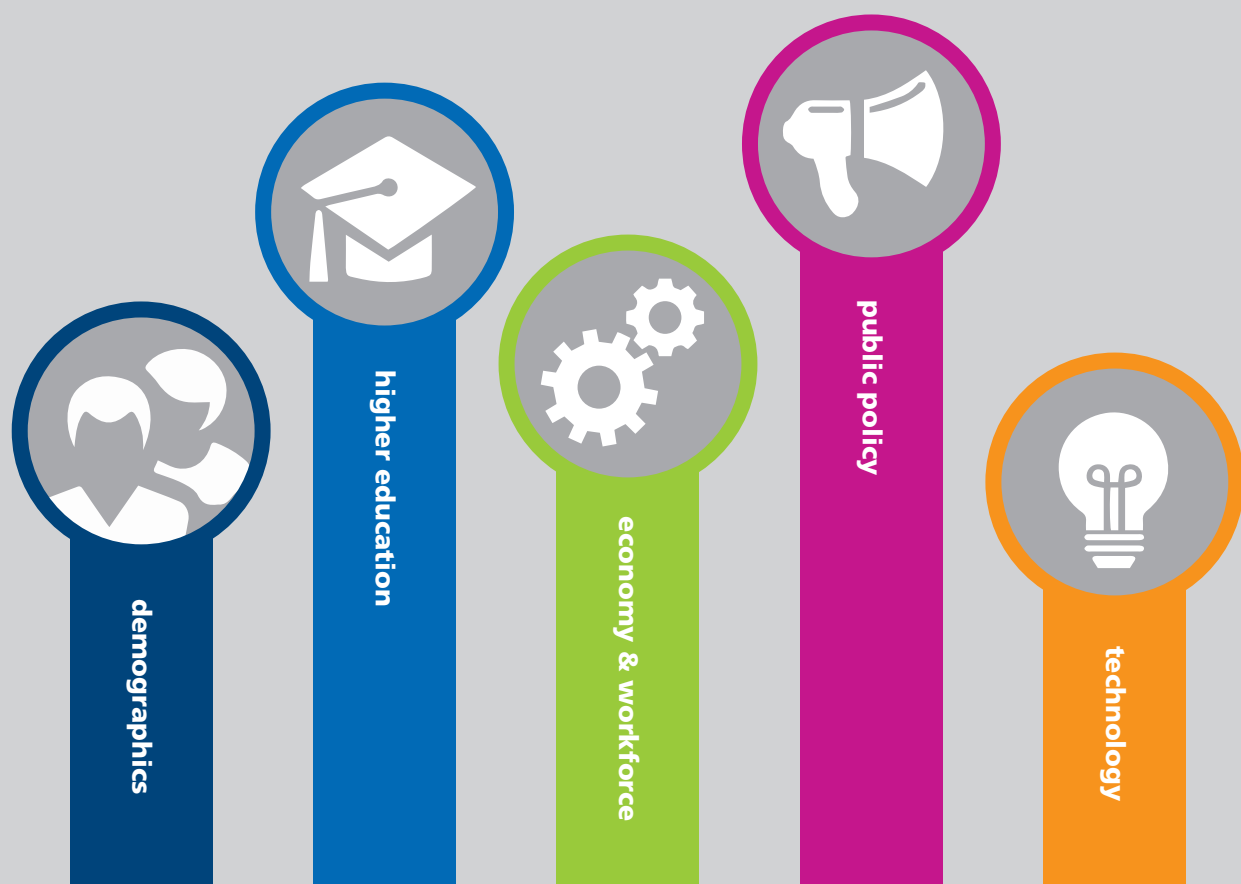
OZARKS TECHNICAL COMMUNITY COLLEGE

As Ozarks Technical Community College sets out to begin

its annual strategic planning process, information on the external environment of the college has been collected in order to assist in planning strategically for the future. This report is a compilation of important issues and trends that impact the institution and the communities it serves.

The purpose of this document is to anticipate and plan for the opportunities and challenges that OTC will face in the future. Key findings have been categorized into five areas of change: demographics, higher education, economy and workforce, public policy and politics, and technology. These five trend areas interact to shape the environment in which OTC functions.

The emerging trends identified in this report inform the strategic planning process at OTC and are vital to setting and achieving the goals and initiatives of the college. As planning for the future continues, information about these areas provides a context for decision-making related to how OTC fulfills its mission.



demographics



Staying close to home

Most public two-year college students attend local colleges.

Median distance from students' home to colleges in miles



Source: American Council on Education, "Education Deserts: The Continued Significance of 'Place' in the Twenty-First Century," Viewpoints Voices from the Field, February 2016.

AACC analysis of 2011-12 National Postsecondary Student Aid Study (NPSAS: 12) data, U.S. Department of Education, National Center for Education Statistics.



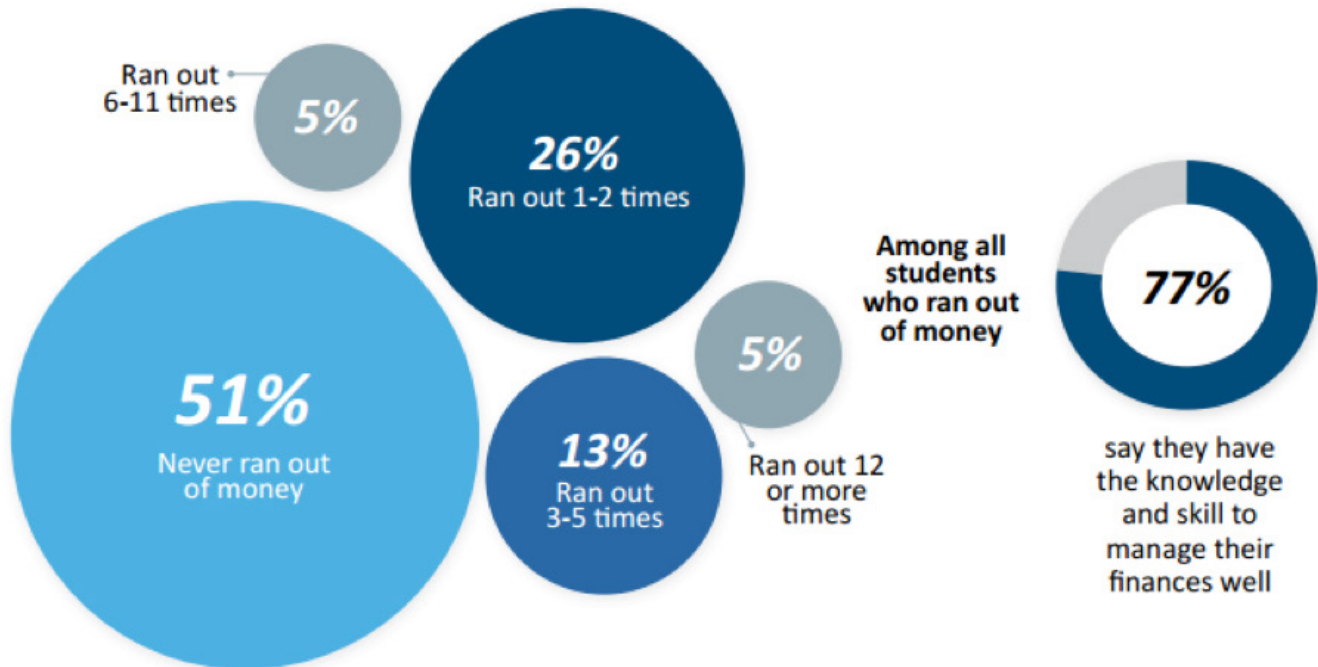
Most community college students live within eight miles of the college they attend, far closer than students who attend public and private four-year colleges and universities. When selecting a college, factors such as proximity, transportation, affordability and flexibility play a key role for low-income students, particularly for students of color. Local community colleges are often the best options for these students. Also, more than 60 percent of community college students juggle jobs and school, which is another factor for them in selecting a local two-year college.



Financially challenged

Each year, almost half of community college students must rely on outside financial resources.

How often students ran out of money in the past 12 months



Source: Center for Community College Student Engagement (CCCSE), [*"Making Ends Meet: The Role of Community Colleges in Student Financial Health" \(2017\).*](#)

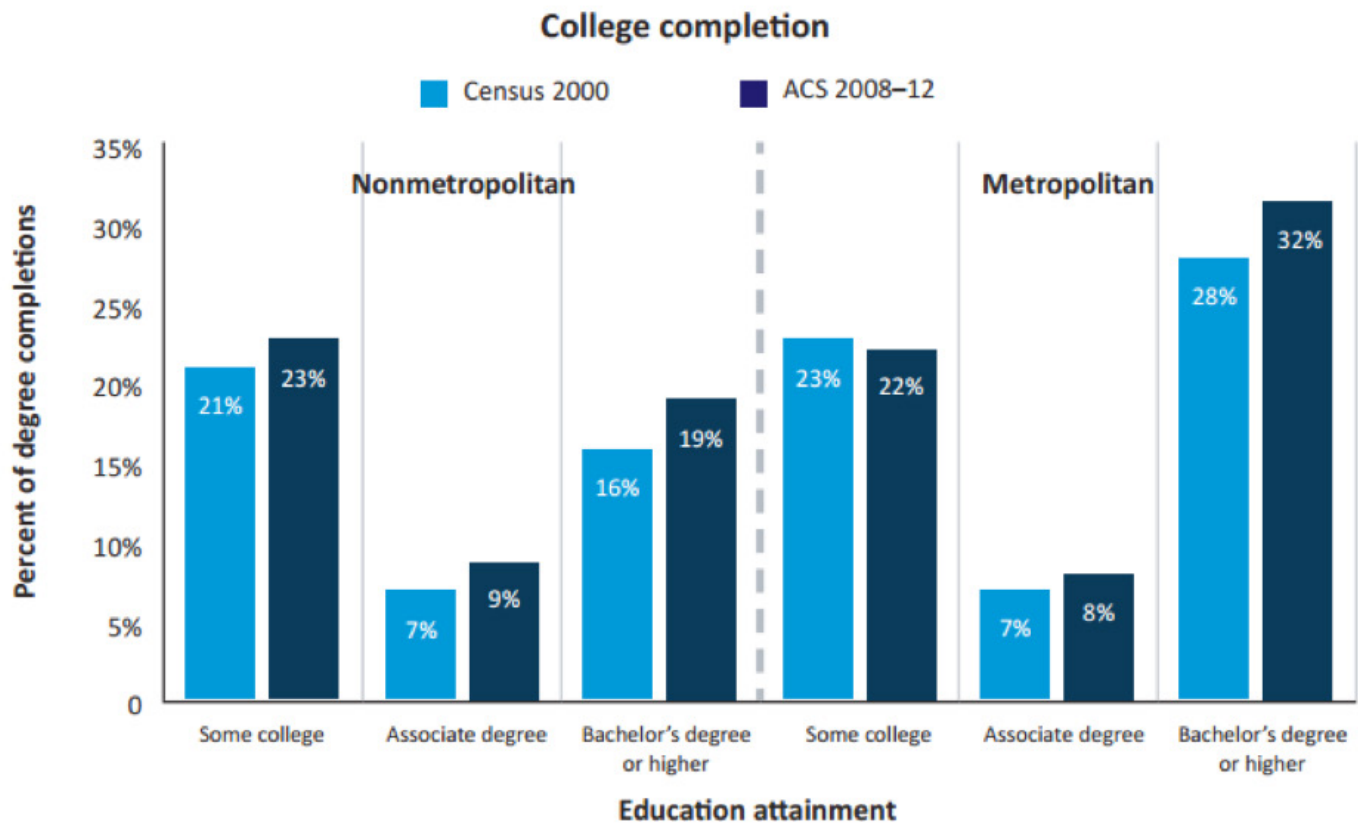


Tuition, fees, books and supplies comprise only a portion of the cost of attending a community college. As a sector, public community colleges charge the lowest tuition and fees; However, students still face the challenges of paying for their living expenses, such as housing, transportation, child care and food, while attending college. According to a survey of community college students by the Center for Community College Student Engagement at the University of Texas at Austin, 49 percent of respondents reported struggling with making ends meet, resorting to taking loans or asking friends, family or charitable organizations for financial help at least once or twice over the past year. As many as one in 10 students reported having to rely on outside resources six or more times. Access to readily available support, such as year-round Pell grants and emergency funding programs through the college, could greatly allay students' financial insecurities during the year.



Rural vs. urban degree completion

Rural areas have higher attainment in associate degrees but lag behind on bachelor's degree completion.



Source: Marre, A. W. (2nd Quarter), 2014. College Education in the Post-Recession Rural Economy. Choices Magazine, Vol. 29, No. 2. Retrieved from <http://www.choicesmagazine.org/choices-magazine/submitted-articles/college-education-in-the-post-recession-rural-economy>.



Associate-degree attainment is higher in rural areas than urban areas, according to U.S. Census data. Urban and rural areas both showed a 7 percent attainment of associate degrees in 2000, but the rate increased in 2008-12 to 9 percent in rural areas, compared to 8 percent in cities. Bachelor's degree attainment is significantly higher (32 percent) in metropolitan areas compared to non metropolitan areas (19 percent).



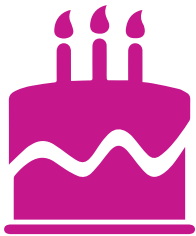
demographics

2,617

OTC students
graduated in 2016
— including —
880 A+ students
& 78 veterans



95% of OTC
graduates
stay in
MISSOURI



AVERAGE
STUDENT AGE

22

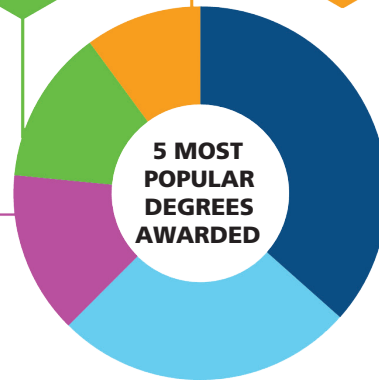
360 DEGREES
BIOLOGICAL
CLINICAL
SCIENCE



344 DEGREES
BUSINESS &
MARKETING



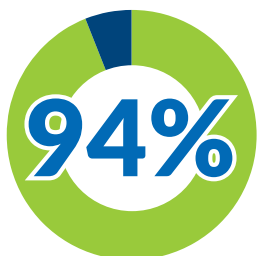
393 DEGREES
ALLIED HEALTH



965 DEGREES
ASSOCIATE OF ARTS



809 DEGREES
TECHNICAL EDUCATION



of our graduates
find employment or
continue their education
at a four-year institution

640
students awarded
scholarships



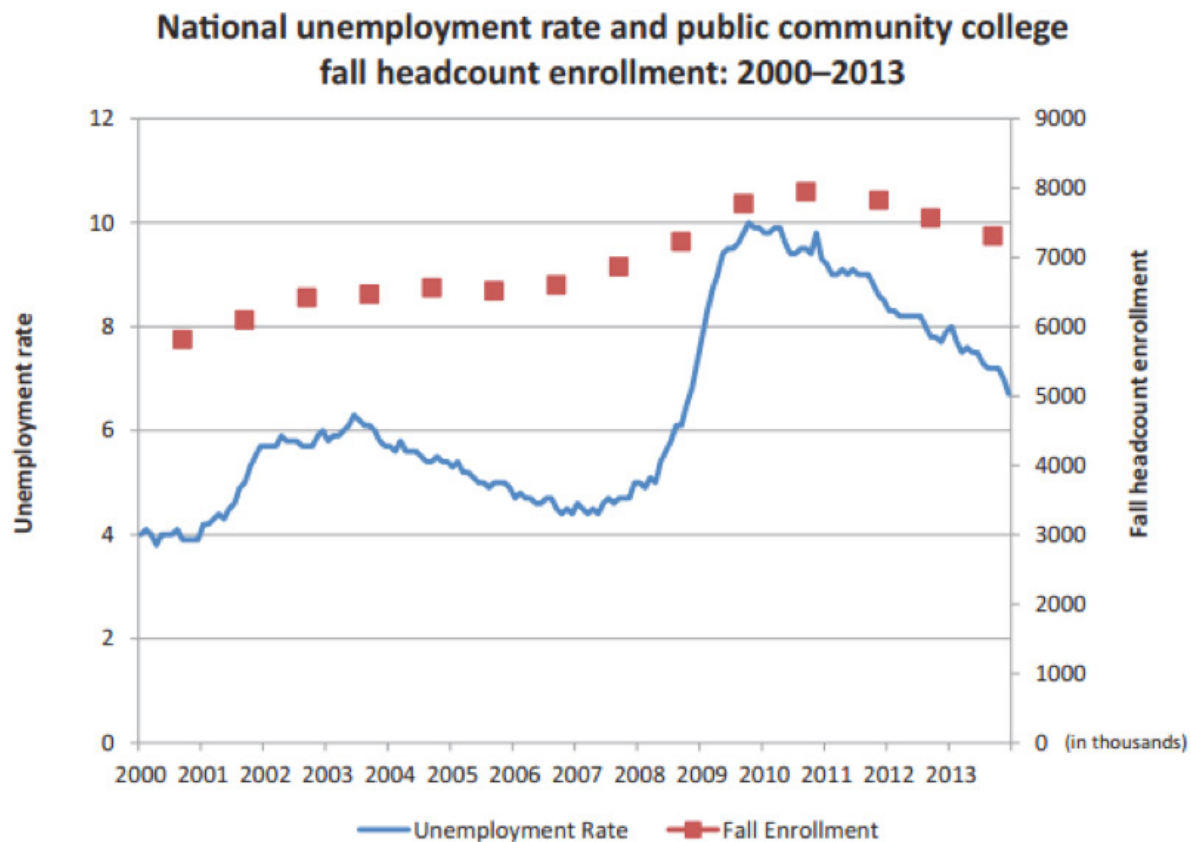
MORE THAN
\$800,000
IN SCHOLARSHIPS AWARDED

higher education



Watching the economy for enrollment trends

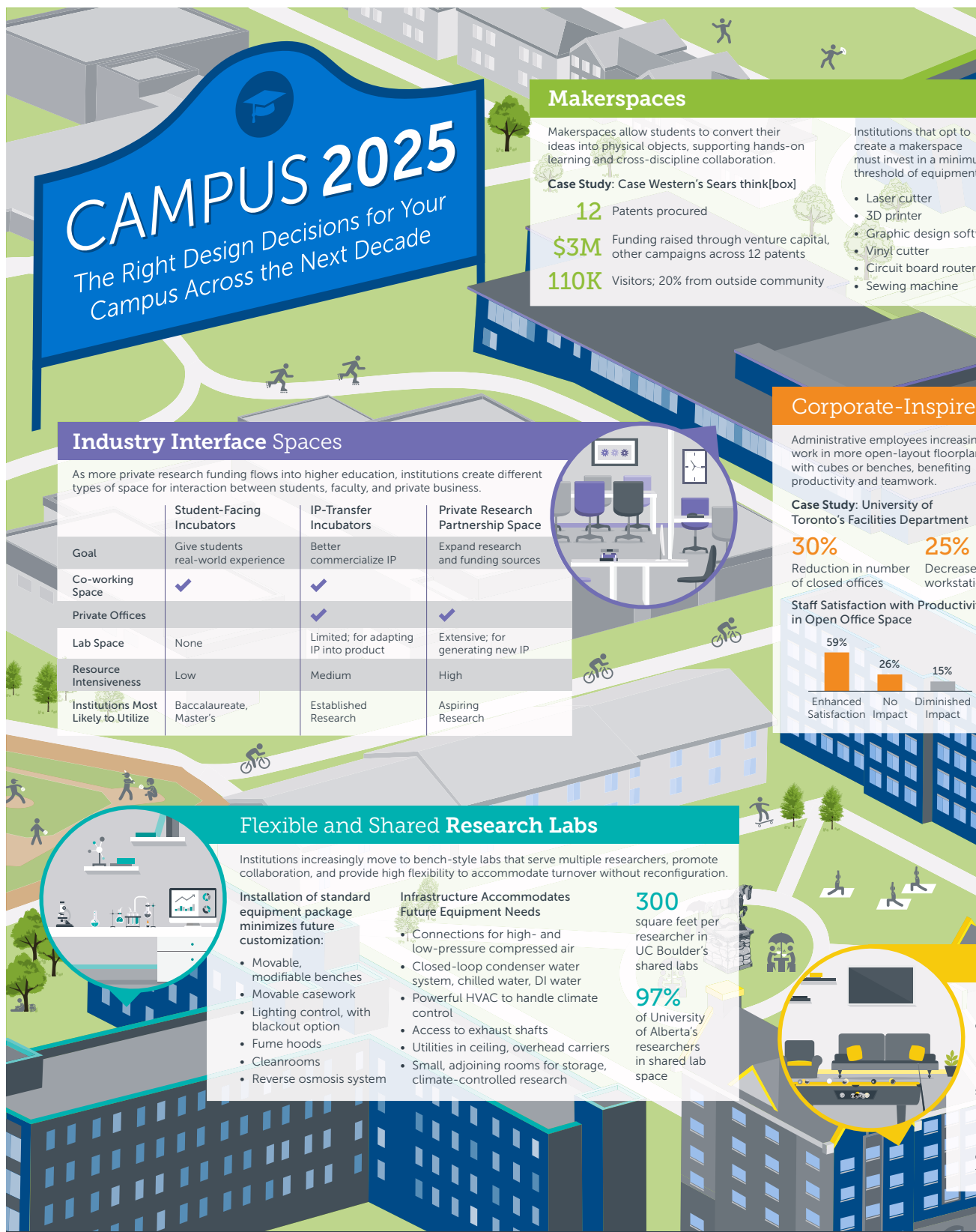
Enrollment trends at community colleges can typically be predicted based on how the economy is doing.



Source: "Community College Completion: Progress Toward Goal of 50% Increase," American Association of Community Colleges, April 2015.

Hussar, W.J., and Bailey, T.M. (2013). "Projections of Education Statistics to 2022" (NCES 2014-051). U.S. Department of Education, National Center for Education Statistics.





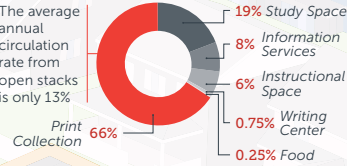


Libraries

Less space is dedicated to shelving; it's instead repurposed for other student needs, focusing on comfort, collaboration, and connectivity.

Typical 2015 Library Space Allocation¹

The average annual circulation rate from open stacks is only 13%



Most colleges and universities will renovate the library around the concept of the "learning commons," including:

- Collaborative study spaces
- Food and drink
- Academic support services
- Comfortable meeting spaces
- Easy Wi-Fi and outlet access

Office Spaces

Increases in non-tenure-track faculty create opportunities for less space-intensive workstations, like cubes and shared offices, to accommodate focus on teaching.

Decreased Need for Private Offices

While some privacy for student meetings needed, non-tenured faculty not dedicating time to individual research like tenured faculty.

Increased Emphasis on Location

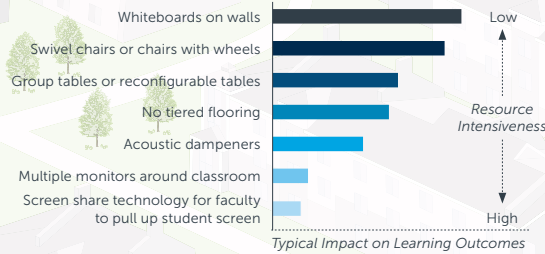
Student accessibility is key for instructors focused exclusively on teaching.

Active Classrooms and Learning Spaces

Institutions create more classroom space dedicated to active learning, which centers on student interaction and engagement and has shown to improve learning outcomes. However, active learning classrooms do require investment of space and resources.

35% Extra space needed for a typical active classroom.

Small, physical changes in learning spaces have a bigger impact on learning outcomes than expensive technology.



Community-Centric Residence Halls

Institutions continue to invest in luxury-style halls to compete with private developers and boost enrollment, but increase emphasis on community-centric halls that boost freshman and sophomore retention.

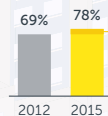
\$4B-\$5B

Estimated size of the student housing market

300%

Increase in the supply of off-campus housing units from 2010 to 2014²

Case Study: BGSU's³ Emphasis on Communal Space Drives Retention Rate⁴



New residence hall design emphasizes common areas like lounges, study and social spaces, and kitchenettes, which constitute 30% of square footage.³

Learn more about how your campus should respond to each trend.

eab.com/fff/campus2025

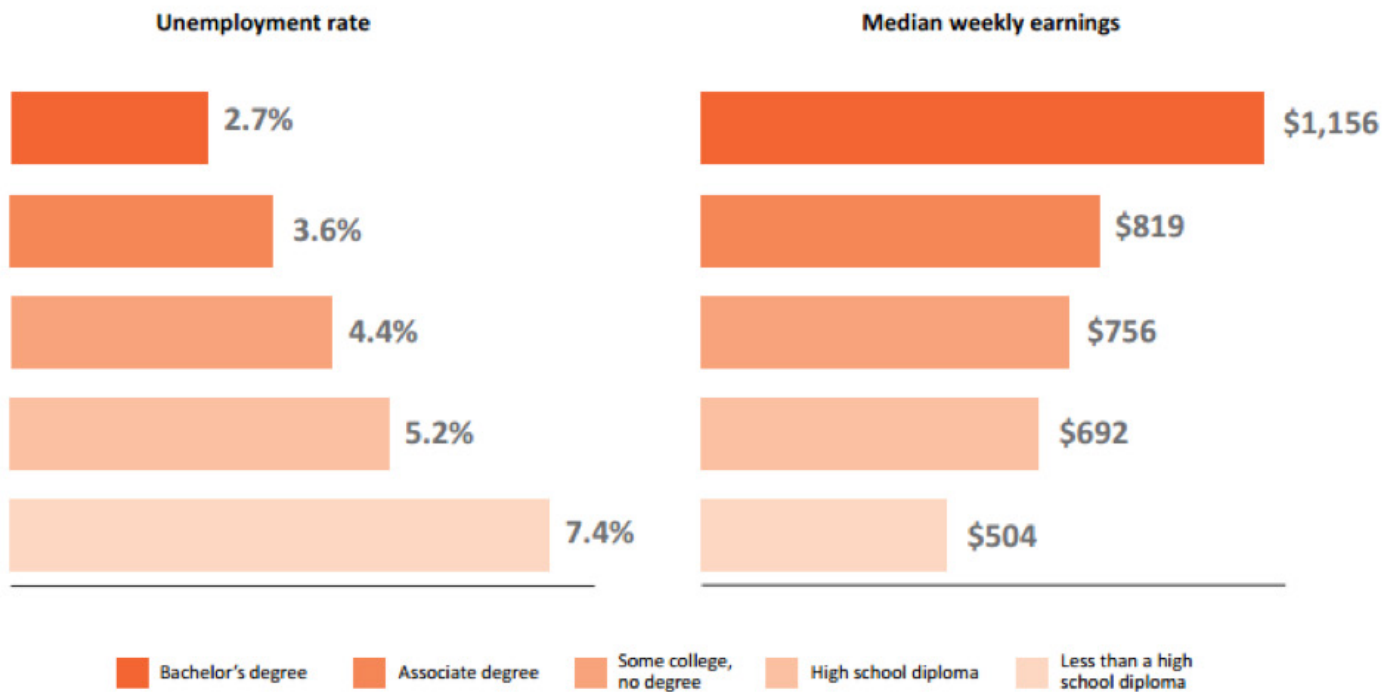
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More education = better jobs

Higher educational attainment leads to increased earnings and lowers the likelihood of unemployment.

Unemployment rates and earnings by educational attainment, 2016



Source: Bureau of Labor Statistics, Current Population Survey "[Career Outlook: More Education: Lower Unemployment, Higher Earnings.](#)" April 2017.

Editor's note: Data are for individuals age 25 and older. Earnings are for full-time wage and salary workers.





Boom in certificates

Between 2000 and 2014, the number of certificates awarded at community colleges increased by 236 percent.

Certificates awarded at community colleges: 2014



**Does not add up to 100% due to rounding.*

Source: AACC analysis of Integrated Postsecondary Education Data System (IPEDS) 2014 Completion data file, U.S. Department of Education, National Center for Education Statistics.
Carnevale A.P., Rose, S.J. & Hanson, A.R. (2012), "Certificates: Gateway to Gainful Employment and College Degrees," Georgetown University Center on Education and the Workforce



According to IPEDS, short-term certificates include awards for programs that are less than one academic year; medium-term certificates are programs that are at least one year, but less than two academic years; and long-term certificates are awards for at least two years, but less than four academic years.

Sixty one percent of the 1.2 million credentials that community colleges awarded in 2014 were associate degrees and 39 percent were certificates. Most of the latter were short-term certificates (60 percent); 38 percent were medium-term; and 1 percent were long-term certificates. Short-term certificates grew by 236 percent and medium-term certificates increased by 101 percent between 2000 and 2014. Community colleges confer substantially more certificates than any other sector of higher education. They have become a stepping stone for many students to earn occupationally focused credentials, prepare for further education or to retrain workers who already have postsecondary credentials. Certificates are cost effective and often lead to middle-class jobs, with some of those occupations paying more than jobs requiring college degrees.



Critical to Success: Strengthened Advising

Survey data from the Center for Community College Student Engagement have consistently shown that students view academic planning and advising as the most important service offered by their college. Yet, students commonly point to missing elements in the process.

Among entering students, only 38 percent agree or strongly agree that an adviser helped them set academic goals and develop a plan to achieve them. Moreover, just 26 percent of survey respondents say that someone at the college talked with them about commitments beyond schoolwork and helped them establish an appropriate course load. And 45 percent say they never saw an adviser by the end of the third week of class. Could the need for strengthened advising be any clearer?



Successes in Pathways

The Carnegie Foundation for the Advancement of Teaching. Thirty community colleges in eight states are involved in early implementation of Statway, a mathematics pathway that leads students through developmental math to completion of a college-level statistics course in one academic year. Statway features intensive student engagement, a strong focus on increasing student motivation and tenacity, and development of knowledge and skills needed for college navigation and academic success. Early results suggest that, compared to traditional approaches, Statway triples student success in half the time.

Miami Dade College (Florida). A completion by Design college, Miami Dade College faculty have developed pathways in biology, business, criminal justice, and psychology—four of the college's five largest programs of study. Each of these associate degree pathways incorporates 36 general education credits and 24 courses in the program of study, all sequenced and designed to reinforce one another and to align students' work with upper-division courses. Developmental and EAP onramp courses are aligned with gatekeeper courses (often in accelerated formats) to facilitate the transition to college-level study in math and English.

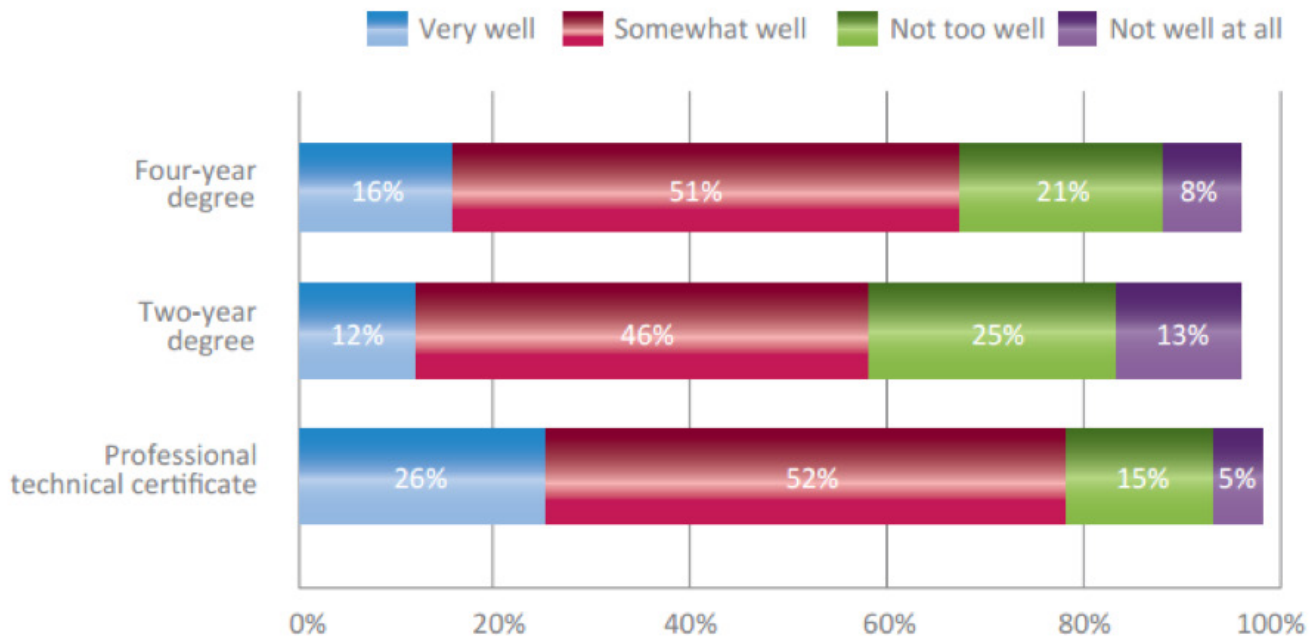
economy & workforce



Prepared for the workforce

Technical career students most strongly feel that their education prepared them for their jobs.

How well does post-high school education prepare students for the workforce?

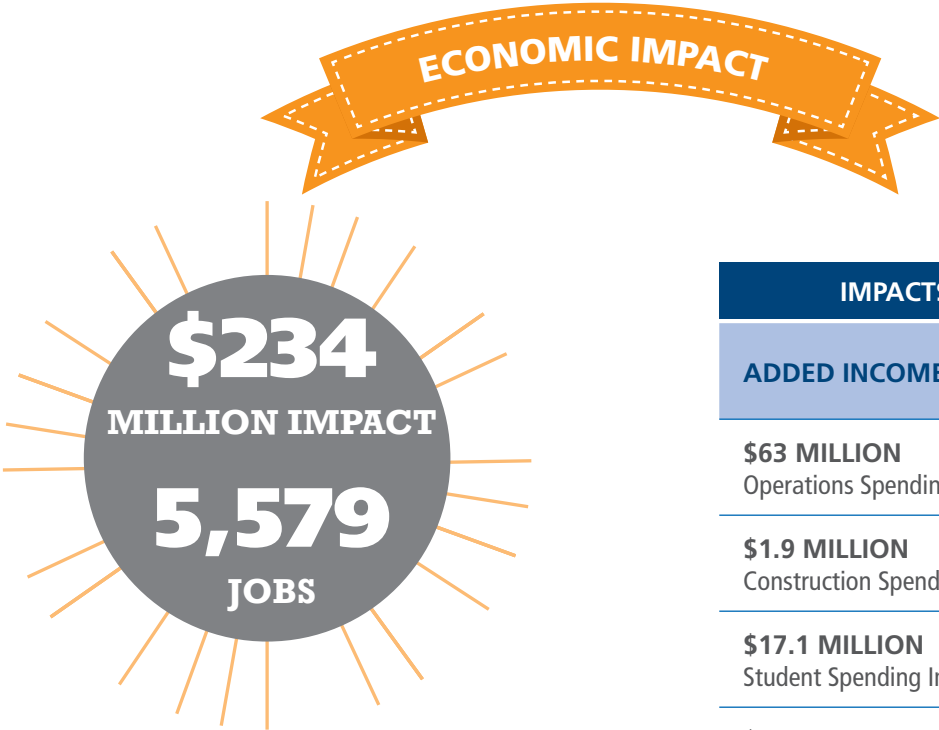


Source: The Pew Research Center, Social and Demographic Trends, 0235 "The State of American Jobs," October 2016.



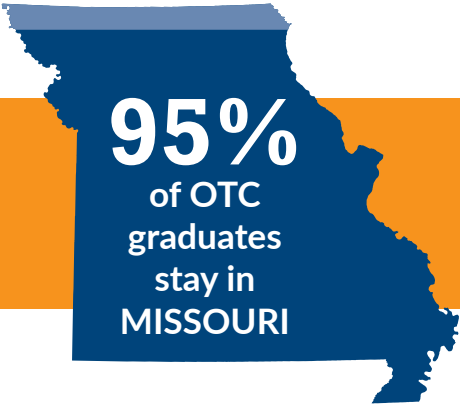


OTC ECONOMIC IMPACT & RETURN ON INVESTMENT



TOP INDUSTRIES IMPACTED BY OTC		
INDUSTRY	TOTAL INCOME	JOBS
Healthcare & Social Assistance	\$45 M	882
Management of Companies & Enterprises	\$20.1 M	225
Professional & Technical Services	\$16.2 M	418
Accommodation & Food Services	\$15.1 M	413
Manufacturing	\$14.9 M	213
All Other Industries	\$122.7 M	3,428

IMPACTS CREATED BY OTC	
ADDED INCOME	JOBS
\$63 MILLION Operations Spending Impact	2,383
\$1.9 MILLION Construction Spending Impact	46
\$17.1 MILLION Student Spending Impact	367
\$152 MILLION Alumni Spending Impact	2,782
\$234 MILLION Total Impact	5,579 Total Jobs



Source: Emsi



FISCAL YEAR (FY) 2015-16

EVERY DOLLAR SPENT

STUDENTS

\$5.30

Gained in lifetime earnings for students

Local TAXPAYERS

\$4.70

Gained in added taxes and public sector savings for local taxpayers

State & Local TAXPAYERS

\$6.50

Gained in added taxes and public sector savings for state & local taxpayers

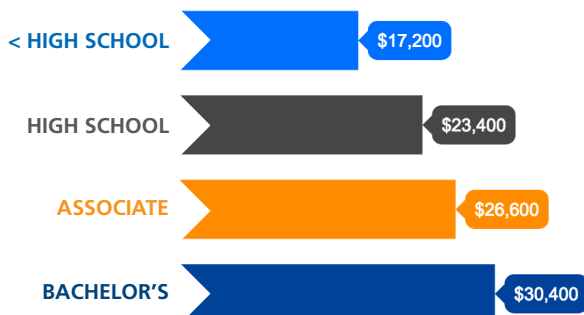
SOCIETY

\$12.50

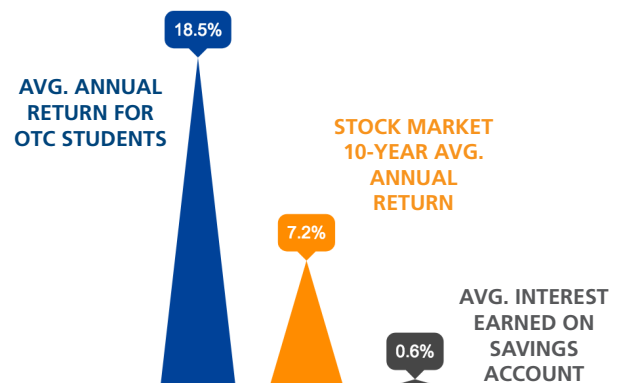
Gained in added state revenue & social savings for society

RETURN ON INVESTMENT

HIGHER EARNINGS BY EDUCATIONAL LEVEL AT CAREER MIDPOINT IN THE OTC SERVICE AREA



STUDENT RATE OF RETURN





Impact on national economy

During the analysis year, America's community colleges and their students added **\$809 billion** in income to the U.S. economy, approximately equal to the **5.4%** of the nation's Gross Domestic Product. The economic impact of community colleges break down as follows:

- Over the years, students have studied at America's community colleges and entered or reentered the workforce with newly-acquired skills. Today millions of former students are employed in the U.S. workforce.
- The accumulated contribution of the increased productivity of former students working in the U.S. amounted to \$806.4 billion in added income in 2012.

INCOME CREATED BY AMERICA'S COMMUNITY COLLEGES IN 2012



FOR EVERY \$1 SPENT...





Ozark Top Openings

2014-2024

The Ozark region is expected to have more than 90,000 total job openings between 2014 and 2024. This includes openings created by new job growth, as well as those created through the need for replacement workers. Replacement openings occur due to retirement, turnover, or transferring to another occupation.

During this projection period, the 20 occupations with the greatest number of total openings include 4 Office and Administrative Support Occupations and 4 Food Preparation Occupations. "Retail Salespersons" and "Combined Food Preparation and Serving Workers" are the occupations that are expected to have the greatest number of total openings, with over 4,000 total openings for each.

Occupation	2014 Est. Employment	2024 Proj. Employment	Growth Openings	Replacement Openings	Total Openings	Average 2015 Wage
Retail Salespersons	9,730	10,800	1,070	3,372	4,442	\$26,026
Combined Food Preparation and Serving Workers	7,412	9,265	1,853	2,395	4,248	\$19,170
Waiters and Waitresses	5,279	6,027	748	2,540	3,288	\$18,142
Cashiers	6,121	6,673	552	2,604	3,156	\$19,533
Registered Nurses	5,614	7,216	1,602	1,325	2,927	\$54,819
Customer Service Representatives	4,508	5,531	1,023	1,110	2,133	\$29,875
Office Clerks, General	5,916	6,560	644	1,276	1,920	\$26,605
Nursing Assistants	4,015	5,016	1,001	907	1,908	\$23,229
General and Operations Managers	4,187	4,764	577	1,060	1,637	\$79,485
Laborers and Freight, Stock, and Material Movers, Hand	3,678	4,088	410	1,095	1,505	\$25,844
Heavy and Tractor-Trailer Truck Drivers	6,034	6,495	461	1,026	1,487	\$41,593
Maintenance and Repair Workers, General	3,165	3,628	463	829	1,292	\$31,141
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	3,420	3,939	519	679	1,198	\$23,452
Stock Clerks and Order Fillers	2,963	3,169	206	940	1,146	\$24,567
Cooks, Restaurant	2,104	2,657	553	557	1,110	\$21,020
First-Line Supervisors of Food Preparation and Serving Workers	1,950	2,384	434	579	1,013	\$29,996
Maids and Housekeeping Cleaners	2,569	2,960	391	613	1,004	\$19,413
First-Line Supervisors of Retail Sales Workers	2,975	3,290	315	665	980	\$39,279
Secretaries and Admin Assistants, Except Legal, Medical, and Executive	4,681	5,148	467	493	960	\$28,828
Childcare Workers	1,793	2,086	293	529	822	\$19,218

Data Sources: Missouri Economic Research and Information Center (MERIC), Long-Term Occupational Projections, Occupational Employment and Wage Survey, and U.S. Bureau of Labor Statistics. Product funded by the U.S. Employment and Training Administration, Workforce Information Grant.





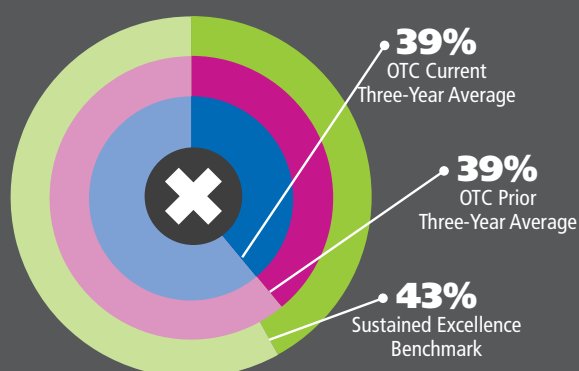
public policy

State performance funding indicators (2016)

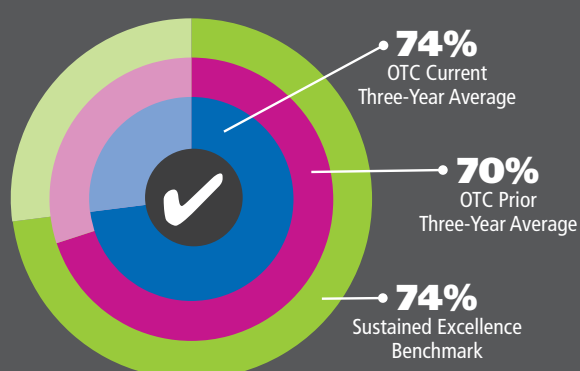
Institutions can meet performance funding indicators by improving over their prior performance or meeting a national benchmark for sustained excellence.



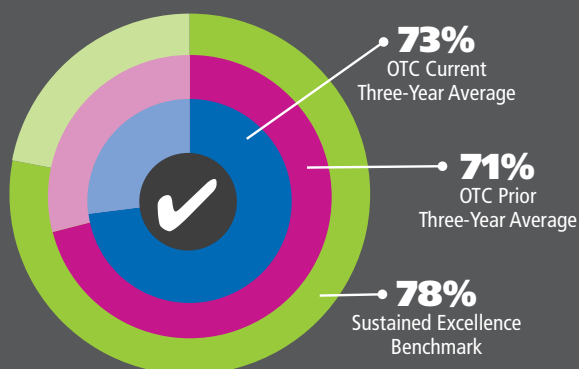
Three-Year Completion Rate



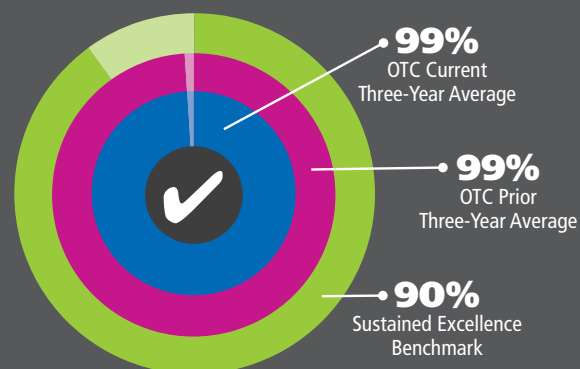
Fall to Spring Persistence



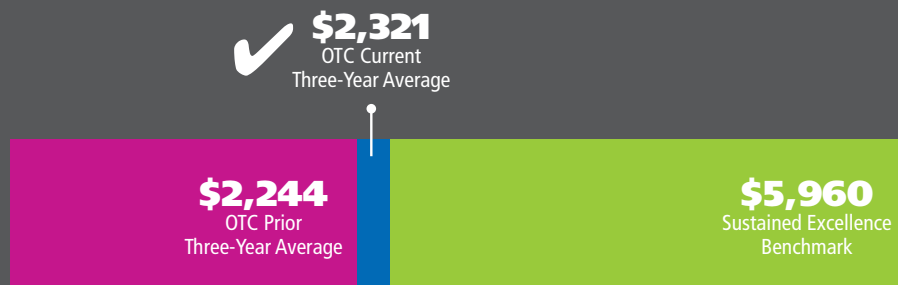
All College-Level Course Enrollee Success Rate



Licensure/Certification Exam



Cost in Tuition & Fees Plus State Appropriations per FTE





Authorize and fund a program dedicated to supporting and expanding innovative community college and industry partnerships, such as the proposed Community College to Career Fund.

Increase funding for the occupational and adult basic education programs authorized in the Workforce Innovation and Opportunity Act.

HIGHER
EDUCATION ACT
REAUTHORIZATION

WORKFORCE
DEVELOPMENT

ELEMENTARY
& SECONDARY
EDUCATION ACT
REAUTHORIZATION

PERKINS CAREER
& TECHNICAL
EDUCATION ACT
REAUTHORIZATION

TAX BENEFITS
FOR HIGHER
EDUCATION

ALLIED HEALTH
& NURSING
LEGISLATION

Ensure continued eligibility and access to federal student aid for the neediest students.

SUSTAINABILITY

Maintain a strong commitment to Pell Grant funding.

PELL
GRANTS

Reinstate the year-round Pell Grant program.

Increase the total eligibility period from 12 to 14 semesters.

16

COMMUNITY COLLEGE FEDERAL LEGISLATIVE PRIORITIES

AACC & ACCT
support these
legislative priorities

Support major federal student aid programs, SEOG and Federal Work-Study.

Increase funding for institutional programs that enable community colleges to serve diverse and disadvantaged populations.

Fund essential Higher Education Act programs impacting veterans and rural colleges.

HIGHER
EDUCATION
ACT
FUNDING

DATA,
ACCOUNTABILITY
& RATINGS

STEM
COMPETITIVENESS

INTERNATIONAL
EDUCATION
PROGRAMS

RURAL
ECONOMIC
DEVELOPMENT

WELFARE
REFORM

VETERANS

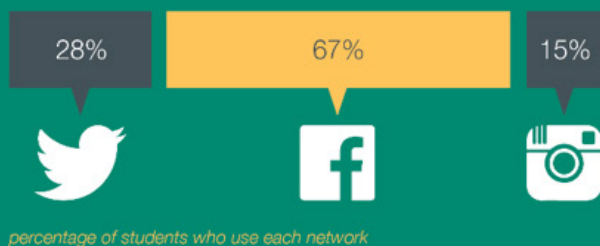
DREAM
ACT



technology

DIGITAL TECHNOLOGY IS DEEPLY EMBEDDED INTO OUR STUDENTS' LIVES.

in social interactions¹



in antisocial interactions²



CYBERBULLIED

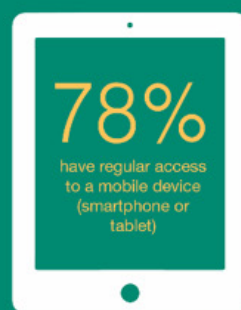


a minority sexual orientation was associated with higher frequencies of being cyberbullied



"We don't have a choice on whether we do social and mobile; the choice is in how well we do it"
Erik Qualman

in the palms of their hands¹



88% use mobile devices to browse the Web

43% browse the Web exclusively on a mobile device



73% are interested in downloading institution-specific apps

in seeking information³



75% of high school seniors in AP classes have used Wikipedia for research



17% of high school seniors in AP classes have used a database such as EBSCO for research

Source: Guidry, K.R (2015). *Digital Technology is Deeply Embedded into Our Students' Lives*



MILLENNIAL MINDSETS & COLLEGE ADMISSIONS

2015 SOCIAL ADMISSIONS REPORT

Millennials, Plurals, the iGeneration - students today view technology as an extension of themselves and adopt new resources at exceptional speeds. So how do colleges navigate the changing perceptions of these digital natives during the admissions process?

VISUAL FIRST

TOP 3 Social Media Apps for Researching College



80% **44%**
WATCHED
video from college video from student
DURING COLLEGE RESEARCH

DISTINCT & UNIQUE

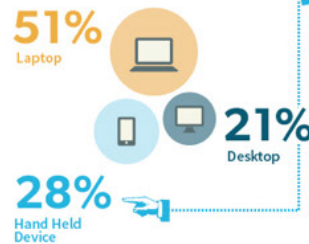
"I would like to receive communication from college admissions tailored specifically to me."



EXPERIENCED RESEARCHERS

Digital Natives

Device Used To Research Colleges



59% **VISIT**
COLLEGE WEBSITES
on mobile at least **ONCE** a week



Changing Perceptions

ONLINE RESOURCES

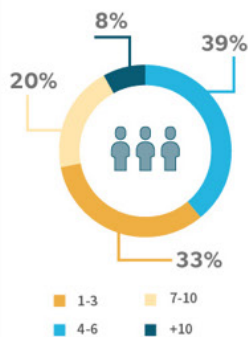


3 OUT OF 4

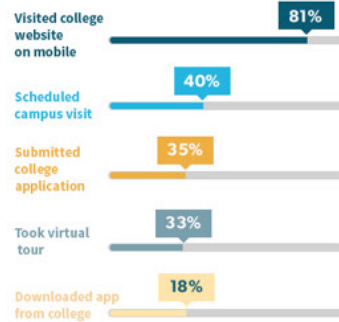
STUDENTS FIND COLLEGE REVIEW & SCHOLARSHIP SITES VERY USEFUL

SAVVY CONSUMERS

Number of Colleges Applied to:

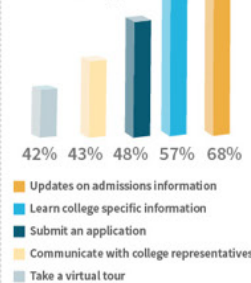


TOP 5 Activities on Mobile



App Happy :)

-top reasons to download apps-



INSTANT GRATIFICATION

Expected Response Time from College Reps



PRIVACY SENSITIVE

Private Messaging Apps



Reserved for Friends, Not Admissions



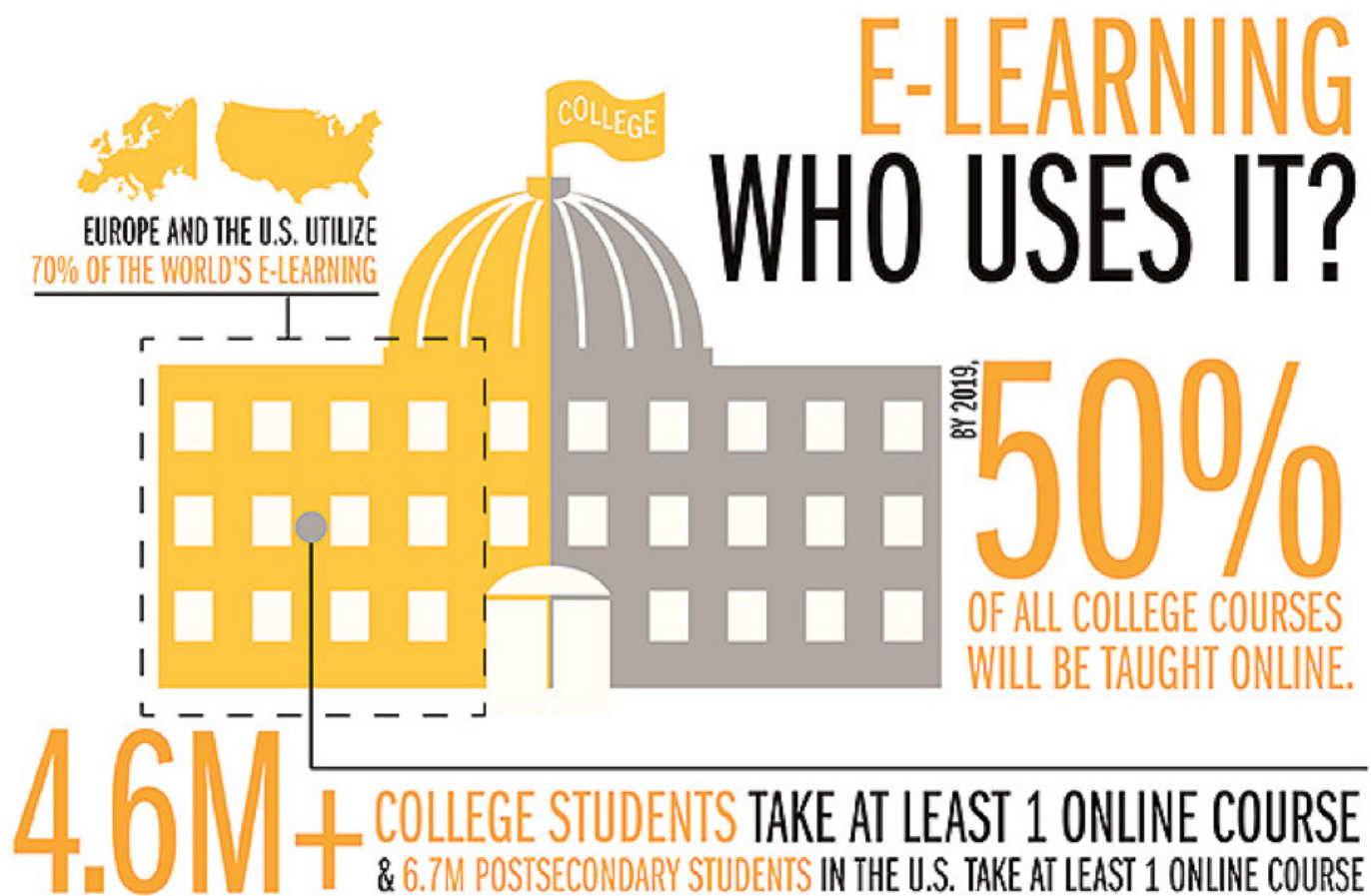
#socadm15

Source: Social Admissions Report survey of 1800 high school students registered to Chegg

Uversity Chegg



THE FUTURE E-LEARNING



Source: etrainingPedia



A few examples of best practices

Digital community college winners from the Center for Digital Education (2016-2017)

Thomas Nelson Community College, Va. (enrollment 10,000 students or more)

- The college recently launched an online platform designed to help students better prepare to enter the global workforce.
- The platform provides guided onboarding, academic planning and course scheduling, and enables students to make program selections using real-time job data and campus resources.
- The platform streamlines the enrollment process and creates personalized pathways for students that align with their goals.
- The college also has several classrooms equipped with technologies that allow low enrollment courses to be taught remotely in several locations rather than be canceled.

Lord Fairfax Community College, Va. (enrollment between 5,000 and 10,000 students)

- Lord Fairfax Community College recently implemented a video technology service to enable lecture capture and recording, digital whiteboarding and remote connections from anywhere in the world for any student with an internet connection, regardless of platform.
- The service also includes a remote-control teleconferencing robot that enables the school to interact with students remotely to better engage them and to capture their feedback.
- The new service provided an initial cost-savings of \$750,000.

Carl Sandburg College, Ill. (enrollment of 5,000 or fewer students)

- Recognizing that most students are tied to their mobile devices, Carl Sandburg College includes a mobile option for all services they offer.
- The college also offers a learning environment rich with interactive options like gaming, collaborative spaces, virtual reality, and telepresence robots.
- In addition, the Open Education Resource Course Initiative (OERCI) has saved students almost a half million dollars in textbook costs to date.



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