Suffolk County Community College Environmental Scan

Submitted by the SCCC Strategic Planning Council's (SPC) Environmental Scan Task Group

Office of Planning and Institutional Effectiveness
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LIST OF EXHIBITS

INTRODUCTION

An environmental scan refers to the acquisition and use of information about events, trends, and relationships in an organization's external environment, the knowledge of which would assist management in planning the organization's future course of action.[1] Forming the acronym STEP+D, information from the following areas provides the framework for the Environmental Scan.

- S = Social factors (attitudes, health, etc.)

- T = Technology factors (media, computing, etc.)

- E = Economic factors (occupation, growth, etc.)

- P = Political factors (policies, reforms, initiatives, etc.)

- D = Demographic factors (population, age, etc.)

As seen above, STEP+D describe a framework for examining macro environmental factors, with an eye towards how they will affect the college.

Lapin (2004) described the environmental scanning process as a process that identifies changes in the environment or "trend spotting." He stated that when embedded within the strategic planning process, environmental scanning "improves the likelihood that the organization will be able to define its preferred future as opposed to reacting to an imposed future." [2] Moreover, Lapin argues that as the educational nexus within the community, it is incumbent upon

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[1] Choo, Chun Wei (2001) "Environmental scanning as information seeking and organizational learning." *Information Research*, **7**(1) [Available at: http://InformationR.net/ir/7-1/paper112.html] © the author, 2001. Updated:24th September 2001

[2] Lapin, J., (2004). Using external environmental scanning and forecasting to improve strategic planning. *New Forums Press, Vol. 11, (No. 2), Spring 2004* 105–122.

community colleges to respond both quickly and effectively to the external environment. This is accomplished by carefully monitoring change in the environment.

Lapin identified four levels of change (schema) and categorized them along a continuum reflecting their level of permanency in the environment. Stated in order of most to least permanent they are trend, event, emerging issue, and wild card. A brief description of each is provided below and found in Appendix A, *A Four-Part Schema for Categorizing Environmental Change* (Schema).

Trend: The most important of these changes is the trend. Lapin notes that trends may vary in direction and origin; for example, trends may take on a linear form, but not necessarily so. With respect to importance to the college, it is easy to see how trends of an international dimension are potentially impactful. However, it is equally important to remember that a trend could be of a national, regional, or merely a local nature, and still be of importance to the college.

Event: A short-term change, a one-time phenomenon in the external environment

Emerging Issue: Potential controversy arising out of a trend or event that may require some form of response

“Wild Cards” (**of Change**): An event having a low probability of occurrence but an inordinately high impact, if it does occur.

For this report, data from a wide variety of sources - corporate and non-profit foundations, academic associations, educational organizations, teachers’ unions, mainstream media, professional media, government agencies, to name few - were reviewed (Appendix B). Members of the Environmental Scan Task Group conducted a two-step process to categorize information. To determine the extent to which the particular information under consideration

identified a trend, members from the Task Group reviewed the information applying Lapin's Schema on levels of change to guide the process. Next, Task Group members were asked to reexamine the information that rose to the level of a "trend" to determine if said information addressed a College Institutional Goal(s). If so, Task Group members were asked to describe the connection between the identified information and the associated College Institutional Goal(s).

The information gathered from this two-step scanning process and contained in this report will be used to inform the analyses undertaken by the Task Group for SWOT Analysis.[3] Findings from the SWOT Analysis will then be forwarded to the College's Strategic Planning Council, as they construct a 5-year strategic plan for the College.

Please note that text has been cited verbatim without benefit of quotation marks to increase accuracy and readability. Note that hyperlinks to the original sources are contained within the body of the document. Their corresponding URLs are located in footnotes.

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[3] The Task Group on SWOT Analyses examines the identified strengths, weaknesses, opportunities and threats with respect to the College's strategic goals projected for the next five years.

Task Group on Environmental Scanning Membership

Dr. Elizabeth Chu	Assistant Academic Chair, Professor of Mathematics
Dr. Amy Czura	Associate Professor, Biology
Andrew Fawcett	College Associate Dean of Institutional Advancement
Dr. Candice Foley	Professor, Physical Sciences
Dr. Mahine Gosine	Professor, Sociology and Anthropology
Dr. Allen Jacobs	College Associate Dean for Curriculum Development
Dr. John Jerome	Academic Chair; Professor, Mathematics
Dr. Alexander Kasiukov	Associate Professor, Mathematics
Dr. James Keane	Michael J. Grant Campus Executive Dean/Campus CEO
James Lagonegro	Director of Enrollment Information and Reporting
Donald McDougal	Assistant Professor, Sociology
Dr. Ana Menendez-Collera	Professor, Foreign Languages
Dr. Lanette Raymond	Specialist II, Institutional Effectiveness
Dr. Catherine Wynne	Specialist II, Institutional Effectiveness

POLITICAL TRENDS

"In the coming years, jobs requiring at least an associate degree are projected to grow twice as fast as jobs requiring no college experience. We will not fill those jobs – or keep those jobs on our shores – without the training offered by community colleges." – President Barack Obama

On two fronts, need and size, community colleges are important. As suggested by the statement above, the need for community colleges is undisputedly recognized. Likewise, as the largest sector of our nation's higher education system, enrolling more than 6 million students, community colleges are important to the success of higher education in our country. [4] Although community colleges have been successful in establishing their importance in the public's eye, they have not fared as well in establishing their effectiveness. A little more than one-third (34.1%) of full-time degree- or certificate- seeking students at two- year colleges graduate in four years or less. The rate reduces to 27.5% when adjusted to three years or less.[5] [6]

As a result of the tension implicit in the findings above, four identifiable trends or movements have been developing in the political arena: (a) a focus on college affordability, (b) increased teacher accountability for student performance, (c) a call for greater collaboration as found in partnerships and (d) "pipeline" initiatives designed to affect education from kindergarten though college and career.

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[4] White House Issues-Community Colleges

[5] CollegeBoard Completion Agenda Graduation Rates

[6] SCCC's 4- and 3- year graduation rates are 22% (SCCC), 25.5% (SUNY) and 20% (SCCC), 23.% (SUNY), respectively.

<u>Affordability</u>

The Obama administration has focused on community colleges and college affordability. A series of legislative acts designed to make college more affordable have recently been passed, shifting all federal student loan funding through the Department of Education's Direct Loan Program, rather than through private lenders. Results are twofold: reduced interest rates on (many) college loans and an easier loan repayment process. Moreover, money saved as a result of this legislation ($87 billion in federal subsidies to private lenders over a ten-year period) has now been redirected to the nation's community colleges and to federal loans for qualifying students. [7]

The good news is that with the additional $36 billion earmarked for federal Pell grants to low income students over the next ten years, the Department of Education has increased the maximum federal Pell grant award. By 2017 it will be $5,975. The bad news, however, is that the maximum family income cap under which students automatically qualify for a full Pell grant has been reduced from $32,000 to $23,000, which would affect approximately 11% of SCCC financial aid recipients.[8] Moreover, the maximum number of full-time semesters of Pell Grant awards has been reduced from 18 to 12. Lastly, certain categories of students, such as "ability-to-benefit,"[9] will be shut out from the Pell grant program.[10]

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[7] ([Educating Long Islanders in a Changing Economy](#) p. 10).

[8] Special thanks to Rose Bancroft for her assistance with this section.

[9] Ability-to-benefit (ABT) is a term for students who have not received a high school degree or GED but have shown they have a capacity to benefit from college

[10] On the hill: Congress passes budget bill with big changes to Pells AFT On Campus March/April 2012 p 13.

The administration has not overlooked middle-income families. Aid to middle-income families in the form of the American Opportunity Credit and Lifetime Learning Credit (part of the 2009 economic stimulus package) has been enacted. The tax credit can be worth up to $2,500 per student per year. If not made permanent by Congress, the maximum tax credit will revert to $1,800 in 2013, possibly increasing to $1,900 because of inflation. Demonstrating belief in the power of the community college system, the Obama administration has set a goal of generating five million more community college graduates by the year 2020. The proposed Community College to Career Fund will finance the innovation, evaluation, and expansion of efforts to increase college graduation rates and close achievement gaps, including those at community colleges. Promising approaches include performance-based scholarships, learning communities of students, professors and counselors, colleges tailored to promote the success of working adults, and funding formulas based on student progress and success as well as initial enrollment. [11] :)

Accountability/Assessment

Assessment has always been a part of the culture of SCCC. In 1999, the College was awarded a Title III Grant, *Improving Academic Quality through Outcomes Assessment and Faculty Development*. This grant initiative informed the assessment process, particularly outcomes assessment. Below is a brief review of the accrediting body/formal assessment guides to which the College adheres.

Suffolk County Community College is a member of the Middle States Association of Colleges and Schools. As such, it follows the guidelines provided by the Middle States

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[11] American Association of Community Colleges (AACC) fact sheet
http://www.aacc.nche.edu/Advocacy/aginitiative/Documents/ccfactsheet.pdf

Commission on Higher Education. In this connection, the college abides by the Standards for Accreditation found in the Characteristics of Excellence, 2006.[12] For ease in referencing, the context and fundamental elements for the following three standards are provided below.

Standard 7: Institutional Assessment- The institution has developed and implemented an assessment process that evaluates its overall effectiveness in achieving its mission and goals and its compliance with accreditation standards.

Standard 12: General Education - The institution's curricula are designed so that students acquire and demonstrate college-level proficiency in general education and essential skills, including at least oral and written communication, scientific and quantitative reasoning, critical analysis and reasoning, and technological competency.

Standard 14: Assessment of Student Learning - Assessment of student learning demonstrates that, at graduation, or other appropriate points, the institution's students have knowledge, skills, and competencies consistent with institutional and appropriate higher education goals.

The College follows the Suffolk County Community College General Education Assessment Plan [13] in accordance with SUNY and the General Education Assessment Review

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[12] Middle States Commission on Higher Education. (2006). Characteristics of excellence in higher education: Requirements of affiliation and standards for accreditation. http://www.msche.org/publications/CHX-2011-WEB.pdf

[13] *Suffolk County Community College General Education Assessment Plan* *http://instsrv.sunysuffolk.edu/sccgened.pdf*

(GEAR) Group. Although GEAR is currently disbanded, the agreement still holds between the College and SUNY.

Emerging Trends. Although directed at the K-12 level, the intention of the *Race to the Top* initiative is to positively influence college and career outcomes. The grant initiative was first announced by President Obama in July 2009. It is a 4.35 billion dollar competitive grant program designed to "support education reform and innovation in the classroom."[14] The competition seeks to highlight and replicate effective education reform strategies in four significant areas:

- Adopting internationally benchmarked standards and assessments that prepare students for success in college and the workplace;

- Recruiting, developing, rewarding, and retaining effective teachers and principals;

- Building data systems that measure student success and inform teachers and principals how they can improve their practices; and

- Turning around our lowest-performing schools

In August 2010, New York State was awarded a $700 million dollar *Race to the Top* grant. Education Commissioner David M. Steiner characterized the application as one that embodies "bold changes" to advance a "reform agenda." [15]NYS's application established a

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[14] Obama unveils plan to control college costs. (January 27, 2012) CNN.COM
http://www.cnn.com/2012/01/27/politics/obama-trip/index.html?iref=allsearch

[15] New York State wins nearly $700 million in race to the top competition. (August 24, 2010) NYSED.gov
http://www.oms.nysed.gov/press/NewYorkWinsNearly700MinRacetotheTopCompetition.html

controversial teacher and principal evaluation system that makes student achievement data a substantial component of how educators are assessed and supported. Gov. Cuomo announced on February 16, 2012, that an agreement on teacher evaluations had been made. He stated, "Today's agreement puts in place a groundbreaking new statewide teacher evaluation system that will put students first and make New York a national leader in holding teachers accountable for student achievement." The agreement pertains to a teacher evaluation system that was key to the Race to the Top grant that was awarded to the State of New York in 2010. The agreement was signed by Gov. Andrew Cuomo, New York State Education Commissioner John King, and New York State United Teachers President Richard C. Ianuzzi. [16]

The grant application called for raising New York's charter school cap from 200 schools to 460 schools, including provisions for enhancing charter school accountability and transparency. The grant calls for school districts to enter into contracts with Educational Partnership Organizations (the term for non-profit Education Management Organizations in New York State)[17] for the purpose of handing over school management of "persistently lowest-achieving schools" and schools under registration review. [18]

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[16] Governor Cuomo announces agreement on evaluation guidelines that will make New York State a national leader on teacher accountability. (February 16, 2012) https://www.governor.ny.gov/print/2954

[17] Note that an "educational partnership organization" is a board of cooperative educational services, a public or independent, non-profit institution of higher education, a cultural institution, or a private, non-profit organization with a proven record of success in intervening in low-performing schools, as determined by the commissioner, provided that such term shall not include a charter school; (http://law.justia.com/codes/new-york/2010/edn/title-1/article-5/part-1/211-e/)

[18] Governor Cuomo announces agreement on evaluation guidelines that will make New York State a national leader on teacher accountability. (February 16, 2012) https://www.governor.ny.gov/print/2954

Lastly, the grant calls for the appropriation $20.4 million in capital funds to the State Education Department to implement a longitudinal data system. [19]

Partnerships

Through a variety of programs, SCCC has partnered with colleges and universities, business & industry, and research institutions. In fact, due to Dr. Foley's and Dean Leonhardt's excellent efforts to enhance inter-programmatic collaboration between our National Science Foundation (NSF) S-STEM and the CTEP Scholars Program, NSF has nationally recognized and featured SCCC's NSF S-STEM scholarships program as a "model" for future S-STEM programs across the U.S.[20] It is clear that SCCC's long and successful history of collaboration with key stakeholders across education, research, business and industry, positions the College very well for future collaborations.

The following is a status update on recent and current Federally funded grant and contract programs. SCCC is currently participating or has recently participated in each program listed.

The National Science Foundation Science, Technology Engineering & Mathematics Scholarships (NSF S-STEM) Program has provided federal scholarship support for talented, economically disadvantaged STEM majors at SCCC since 2006. SCCC's nationally recognized S-STEM program, which will be funded through 2016 under SCCC's 2nd NSF S-STEM grant, was developed as an extension of the College's initial 2001-07 NSF-CSEMS (Computer Science,

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[19] See FN 11 - New York State wins nearly $700 million in race to the top competition. (August 24, 2010) NYSED.gov
http://www.oms.nysed.gov/press/NewYorkWinsNearly700MinRacetotheTopCompetition.html

[20] SCCC Press Release 12/2/2011
http://www.sunysuffolk.edu/Documents/PressReleases/CF%20revised%20press%20release%20for%20%20NSF%20S-%20STEM%20program.pdf

Engineering & Mathematics Scholarships) grant. As the lead institution for the most continuously NSF-funded scholarship program in the SUNY system, SCCC has developed solid external collaborations with research institutions such as Stony Brook University, Farmingdale State College, the Brookhaven National Laboratory of the U.S. Department of Energy, and other colleges and universities. The NSF S-STEM program works collaboratively with SCCC's New York State Education Department funded the Collegiate Science & Technology Entry Program (CSTEP).

Carl D. Perkins Career and Technical Education Act (CTEA/Perkins IV Grant) is one of the largest sources of federal institutional support for postsecondary education programs at community colleges and other educational institutions, helping them to improve all aspects of cutting-edge career and technical education (CTE) programs. The Perkins Basic State Grants give postsecondary institutions the flexibility to identify local priorities and to fund innovation in occupational education programs. In New York State and many other states in the U.S., community colleges use these grants for a variety of purposes, including training first responders and public safety officers; helping students meet challenging academic, vocational, and technical standards; purchasing equipment and major supplies for CTE programs of study; and fostering better links between colleges and the business community.

The Strengthening Institutions Program (SIP) program (Title III-A of the Higher Education Act) provides critical institutional support, primarily for community colleges and small public and private four-year colleges that have small endowments and few resources available, yet serve high proportions of low-income, historically underrepresented student populations, such as first-generation college students. Given the rising enrollments of low-income students, this competitive grant program is more important than ever to community

colleges, which comprise a substantial majority of the grant recipients. Currently, SCCC is in the 2nd year of a five-year, $2 million Title III-A grant.

The former *Community-Based Job Training Grants* (CBJTG) program at the U.S. Department of Labor grant initiative, which was funded at $125 million over six years, expanded the capacity of community colleges to train unemployed and displaced workers for jobs in high-demand, high-growth industries. It brought together community colleges, local businesses, and the federal workforce investment system to prepare underemployed and incumbent workers in critical industries, including nursing and health care, alternative energy, advanced manufacturing, bio-technology. SCCC has recently concluded three major CBJTG grants – the 2006-09 Mechatronics Job Training Initiative ($2.4 million), the 2008-12 TEAM initiative ($1.7 million), and the 2009-11 POWER grant ($1.9 million). In light of the funding that was to have been provided through the Community College and Career Training Program (CCCTP), this program was facing elimination, yet it may eventually be revived.

Other Important Funding Priorities Many community colleges receive support from programs targeting Hispanic-Serving Institutions, Predominantly Black Institutions (PBIs), and Asian American and Native American Pacific Islander-Serving Institutions; however, SCCC has never been eligible for any of these funding sources and it is unlikely that the College will be eligible for any of these programs in the near future. SCCC currently has several other funding sources, including NYS grants such as Adult Basic and Literacy Education and NYS Department of Health-Health Workforce Retraining Initiative grants, the SUNY Educational Opportunity Program (EOP) grant, and the federal TRIO-SSS grant ($1.45 million) from the U.S. Department of Education.

Empire State STEM Learning Network initiative is part of a six-state consortium that has received support from the Bill & Melinda Gates Foundation, Battelle, and the AT&T Foundation. The initiative aims to build the capacity of local communities to create and institute

innovative and sustainable STEM schools, policies, programs, platforms, and partnerships to improve the college- and career-readiness of all students. Through its collaboration with the statewide network, Long Island will benefit from the experiences of other STEM Hubs in New York and other states.

The following list of partnerships support and/or guide SCCC curricular issues.

- Oil Heat Institute of Long Island: advising and training related to our HVAC/R program
- Green Building Council of Long Island: Part of the USGBC, energy industry issues and building
- General Motors/ASEP: Helps train out future automotive techs at GM and AC Delco shops
- Toyota T10: Helps train out future automotive techs at Toyota dealerships
- Honda PACT: Helps train out future automotive techs at Honda dealerships
- BMW STEP: Helps train out future automotive techs for BMW
- Mercedes ELITE: Helps train out future automotive techs at MB shops
- East End Hospital Alliance: Helps convert hospital LPNs to RNs
- Hauppauge Industrial Association: integrated in three committees (Human Resources, Education and Manufacturing)
- LI Congressional Task Force for Manufacturing: Includes presidents of major L.I. manufacturers
- Brookhaven National Lab: collaborates with our NSF S-STEM & NYS-CSTEP grant programs
- Stony Brook University: collaborates with our NSF S-STEM & NYS-CSTEP grant programs
- ADDAPT: Technology driven aerospace and electronics companies focusing on business development

It is important to note that these activities are in keeping with the College's Institutional Goals. For instance, one of the goals of the SCCC's *NSF-STEM Scholarship program is* to

increase the number of underrepresented students in the STEM disciplines. This goal is aligned with two of our College's Institutional Goals: Institutional Diversity and Community Development/Societal Improvement. SCCC representation on two diversity initiatives sponsored by STEM (STEM Diversity Roundtable and Center and STEM Diversity Summit), assures that these goals are addressed. [21]

Going forward, opportunities for collaborative endeavors look promising. Two regional collaborative initiatives, The Long Island Innovation Index[22] and Accelerate Long Island,[23] are dedicated to coalescing and coordinating the linkage with venture capital and new firms that arise from research and technology assets and infrastructure, including educational institutions here on Long Island.

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[21] Please see Dr. Candice Foley for further information on these initiatives.

[22] The Long Island Index is a project that gathers and publishes data on the Long Island region. Its operating principle is: "Good information presented in a neutral manner can move policy." In November 2002, Nancy Rauch Douzinas, president of the Rauch Foundation, convened a small group of Long Island's civic, academic, labor and business leaders to discuss challenges facing the Long Island region and potential catalysts for new direction. The group continued to expand and within a few months formed an Advisory Committee to identify key goals for the region and develop plans for what would become the Long Island Index. The goal of these reports is to chart how we are doing on an annual basis and to ensure that the data provided is useful, unbiased information that will lead to greater community awareness of Long Island issues and to serve as a catalyst for action. The Index reports that it does not advocate specific policies. They maintain that their goal, instead, is to be a catalyst for action, by engaging the community in thinking about the Long Island region and its future. http://www.longislandindex.org/About-Us.309.0.html . SCCC is currently not a member of the Index.

[23] Accelerate Long Island is a collaborative initiative among the Long Island region's top research institutions, the Long Island Association and the Town of Brookhaven. Its mission is to "unlock the economic potential of Long Island's world-class research institutions by connecting their work product with entrepreneurs and inventors to commercialize technology, foster the growth of a high-tech innovative economy, and create new jobs and businesses on Long Island. By working with all relevant public and private sector stakeholders, it will create an entrepreneurial ecosystem where ideas are transformed into commercial success in industry clusters focusing on technology, clean energy and the life sciences." SCCC is currently not a member of Accelerate Long Island.

The need for developmental education is well documented. According to data from the American College Testing Program (2010), the following percentages of entering students are not ready in these areas: English (34%), mathematics (57%), and reading (48%).[24] Students get into developmental courses for a reason. Therefore it is not surprising that the developmental cohort performs at the level below their non-developmental peers even after completing developmental studies.[25] However, one would hope that the achievement gap between the developmental and non-developmental cohorts would become less pronounced with time. Unfortunately the analyses of students' persistence outcomes through the developmental course sequence found troubling results.

For example, a national study conducted in 2010 found that of the students referred to developmental reading, only 46% completed their recommended course sequence within three years. For students referred to developmental math, the results are even direr - only 33% completed their recommended math course sequence within three years.[26] It is for these reasons that a number of philanthropic organizations have turned their sights towards the needs of developmental students and have created partnerships across various organizations and schools to address this problem. The Carnegie Foundation for the Advancement of Teaching has

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[24] NADE Resolution by Executive Board approved Dec 4, 2010
(http://www.nade.net/site/documents/publications/Resolutions/New/Resolution%20Need%20for%20DE%20Final%202.2.11.pdf)

[25] A longitudinal study conducted on 46,000 students enrolled in community colleges in Virginia reported results that "suggest that the impacts of remediation are generally small in magnitude and statistically insignificant for students at the margin of needing remediation; yet, the estimates are negative and significant for lower-level remediation for most of the academic outcomes explored. This study was reported at the Association for the Study of Higher Education   (ASHE) Conference 2011.

[26] Bailey, Jeong, and Cho (2010) conducted the study on a national data set provided through Achieving the Dream. *Community College Research Center Brief* No 55, ISSN: 1526-2049. May 2011 p 1.

developed a curricular intervention to help developmental math students called *Pathways*.[27]

Completion By Design is a five-year Bill & Melinda Gates Foundation initiative that works with community colleges to significantly increase completions and graduation rates for low-income students under 26.[28] *Getting Past Go*, a national public policy initiative to improve developmental studies in postsecondary education is a collaborative effort on the part of the Education Commission of the States (ECS) and the Project on Education Policy, Access and Remedial Education (PREPARE). There focus is to increase college attainment rates through the alignment of state and system policy.[29]

Pipeline

As noted above, the Educational Pipeline has received much attention of late. The term, Educational Pipeline, is a measure to analyze student progress from K-12 through college to degree. Initially, analyses were conducted at the state level. This allowed for comparisons by state. [30]As the measure has become more widely used, recent developments call for its use as a within-state measure. [31] [32] Measures are taken at four key transition points: (1) high school

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[27] http://www.carnegiefoundation.org/print/1260.

[28] http://www.completionbydesign.org/about-us

[29] http://gettingpastgo.org/blog/2010/01/28/washingtons-i-best-program/

[30] . The National Center for Higher Education Management Systems. Frequently asked questions about the educational pipeline. (October 2005). http://www.higheredinfo.org/analyses/Pipeline_FAQ.pdf

[31] Chancellor's State of the University Address. (January 9, 2012). http://www.suny.edu/chancellor/speeches_presentations/SOU2012.cfm

graduation within four years of entering high school; (2) enrollment in college the fall semester

after receiving a high school diploma; (3) return for the second year of college; and (4)

completion of an associate's degree within three years or a bachelor's degree within six years of

enrolling in college. As seen above, the Pipeline model is dependent upon a traditional, linear

education attainment trajectory and offers few alternatives for measuring success. Use of the

Pipeline as a measure of academic strength/success precludes many SCCC's students from

analyses because many of our students do not enter SCCC the fall semester immediately after

receiving their high school diploma, which is the current measure in use. For example, cursory

analysis of a recent cohort indicates that perhaps close to one-half of this cohort may not have

been enrolled in high school during the previous semester. [33] [34] Moreover, cohort analysis

indicates that only 40% of full-time students and 18% of part-time students complete an

associate's degree within three years.[35]

Pipeline initiatives have figured prominently at the state level. Two elements of

Chancellor Zimpher's plan for SUNY, as laid out in her recent State of the University Address,

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[32] McKay, S. L. (Feb. 17, 2012). Getting back to education basics. Newsday.
http://www.newsday.com/opinion/oped/mckay-getting-back-to-education-basics-1.3539003

[33] http://www.higheredinfo.org/analyses/Pipeline_FAQ.pdf

[34] SCCC data submitted to IPEDS for the Fall 2011 Entering Class found that 8,675 students entered SCCC for the first time. SCCC's High School Yield Report tells us that 4,521 of the students graduating from high schools located in Suffolk County enrolled in SCCC in the subsequent fall semester. Alternatively stated, 52% of the Fall 2011 entering cohort were enrolled in a public or private high school located in Suffolk County the academic year immediately prior to their SCCC enrollment.

[35] SCCC Retention Report 2007 pg. 34 http://instsrv.sunysuffolk.edu/retent/retn0200.pdf

are particularly pertinent to community colleges. The elements concern expanding student mobility and eliminating remediation. Interestingly, SUNY has demonstrated where they believe the critical linkage exists with respect to the Education Pipeline. Responsibility for the Education Pipeline rests in the Office of the Senior Vice Chancellor for Community Colleges and the Education Pipeline.[36]

Expanding student mobility. Referred to as "achieving systemness," a series of SUNY initiatives have been developed to ease transfer and student mobility, with special emphasis placed on helping "students earn their degrees ON TIME." To accomplish this SUNY has launched a "mobility site." The site provides transfer tools for student use – gen-ed courses and up to 12 credits in over 50 majors are transferrable among SUNY campuses. Under SUNY Governance leadership,[37] the issue of complete transferability of SUNY AA and AS degrees will be pursued. Plans are underway to create a data system for students that track all of their earned college credits from high school through graduate work. [38]

Eliminating remediation. Chancellor Zimpher called "to end the need for remediation in our lifetime." She noted that SUNY spends over $70 million a year in remediation, most of which is spent at the community colleges. She further notes that this expense is more than the cost incurred in running 8 of its college campuses. Zimpher maintains that the end to

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[36] This position is currently held by Johanna Duncan Poitier. She provides system oversight and coordination for SUNY's 30 community colleges. As SUNY's senior executive for the education pipeline, she provides leadership to strengthen the critical connections between SUNY's 64 campuses and PreK-12 schools, business leaders, and other partners.

[37] This initiative is headed by University Faculty Senate President, Ken O'Brien, and Faculty Council of Community Colleges President, Tina Good.

[38] See Chancellor's State of the University Address. (January 9, 2012). http://www.suny.edu/chancellor/speeches_presentations/SOU2012.cfm

remediation will be achieved by "sealing the leaks in the education pipeline." To assist this

process a series partnerships and networks have been established or are currently in the process

of development. Empire State STEM Learning Network, Smart Scholars Early College High

Schools, and "Strive-like networks" are examples. [39]

Likewise, a study by the state's Board of Regents found that high school graduation,

alone, is not a strong enough predictor of student success in college. Indeed, scores on math and

English regents held more predictive validity. The Regents caution that students who score

below 80 and 75 on math and English, respectively, are likely to require remediation when they

arrive at college. [40]

An SCCC "pipeline" initiative that bodes well for future similarly-constructed initiatives

involves SCCC math faculty from our Eastern Campus. The SCCC faculty share course content,

course expectations and grading with faculty from Hampton Bays High School, thus apprising

both high school faculty and students of what will be expected. As a result, students have been

engaged in a structured math curriculum in their senior year that has gotten many college-

ready.[41]

Following up on Dr. Zimpher's State of the University address, SCCC president Dr.

McKay made a series of recommendations, published in an editorial in *Newsday* on February 17,

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[39] Ibid.

[40] Long Island Innovation Index 2012. (Page. 18).
http://www.longislandindex.org/fileadmin/Reports_and_Maps/2012_Reports/Long%20Island%20Innovation%20Index%202012.pdf

[41] McKay op.cit.

2012. Alluding to the prevailing custom of scheduling an academically-light final-year by high school seniors, Dr. McKay asks that high school administrators begin assigning students to four years of math and four years of English. Dr. McKay called for partnerships modeled on Governor Cuomo's "Economic Councils" to foster communication and the sharing of ideas to address the educational problems outlined by Dr. Zimpher. Citing a recent study conducted by the Education of the Commission of the States, Dr. McKay asked that New York State join the movement to assure standardization in high school curriculum and graduation requirements that will lead to success in college. [42]

Last thoughts, a review of the SUNY website states that "SUNY is committed to the development of a comprehensive system of partnerships between SUNY's 64 campuses and Pre-K-12 schools, business leaders and other partners dedicated to strengthening the education pipeline to ensure that more students graduate from college prepared to succeed in the workforce.[43] The SUNY model will also be embedded within a state and national network of partners. Current partnerships are being established in Buffalo, Brooklyn and Harlem.[44]

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[42] Ibid.

[43] SUNY - Education Pipeline http://www.suny.edu/educationpipeline/

[44] SUNY – Career to Cradle http://www.suny.edu/educationpipeline/cradletocareer.cfm

Political Implications for Suffolk County Community College

1. The Pipeline concept is now framing a longitudinal approach for understanding and directing education beyond K-12. *The Office of Vice Chancellor for Community Colleges and the Education Pipelin*e has been established to support student success. More than 20 million in capital funds have been allocated to the State Education Department to implement this longitudinal data system. Starting in 2012, evaluation systems at the K-12 level will include student achievement data,[45] with the hope that over time, emerging students will be stronger academically. Pipeline initiatives go on to seek seamless transitions from K-12 to college and again from college to work. It is important to note that the Pipeline model is dependent upon a traditional, linear education attainment trajectory and offers few alternatives for measuring success. Measures are taken at four key transition points: (1) high school graduation within four years of entering high school; (2) enrollment in college the fall semester after receiving a high school diploma; (3) return for the second year of college; and (4) completion of an associate's degree within three years or a bachelor's degree within six years of enrolling in college. However, substantially less than one-half of all SCCC's students follow the traditional educational trajectory modeled in the Pipeline initiative's key transitions, thus precluding them from analysis and limiting results that reflect upon the College as a whole to the experience of a minority of our students. [IG: *Student Success, Institutional Effectiveness, Communication*]

2. SCCC's successful grant history leaves the college well positioned for future collaborations. SCCC's partnership activity, for example, STEM-related activities promotes and supports the College's Institutional Goals of Diversity and Community Development/Societal Improvement. Going forward, partnerships will continue to foster effective communication between the college community and external constituencies. In particular, workforce partnerships inform curricular development and provide networks for our well prepared graduates. This, in turn, supports community development and societal improvement. Grants and grant-related partnerships are part of the existing SCCC culture, one that we will need to continue to foster. [IG: *Student Success, Community Development/Societal Improvement, Diversity, Communication*]

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[45] Although directed to the K-12 level, the recent agreement made between NYSUT and Gov. Cuomo on teacher evaluations, specifically the inclusion of a measure of student performance included as part of teacher evaluation, to comply with New York's Race to the Top grant, is a related emerging issue to monitor.

3. The Obama administration has set a goal of generating five million more community college graduates by the year 2020. While the proposed Community College to Career Fund will finance expansive institutional efforts, it is unclear how this initiative will affect the cost of a college education for the individual student. Current legislation points to ongoing restructuring of financial aid options. For example, the American Opportunity Credit and the Lifetime Learning Tax Credit (Economic Stimulus Package of 2009) currently provides up to $2,500 dollars of tax credits to middle-income families. If not made permanent by Congress, the maximum tax credit will revert to $1,800 in 2013, possibly increasing to $1,900 because of inflation. Changes in Pell Grant awards will present a significant loss of support for many students: lowering the income cap from $32,000 to $23,000, which would affect approximately 11% of SCCC financial aid applicants, and reducing the semester coverage from 18 to 12 semesters, which would affect returning students and some developmental students. In additional to financial challenges, other obstacles to achieving Obama's 2020 goal continue to rest in the facts that the majority of community college students are hindered by a lack of academic preparedness upon arrival and many fail to persist to degree completion. [IG: *Student Success, Access & Affordability*]

ECONOMIC TRENDS

The economic section of the environmental scan consists of three parts. Part I is largely

an excerpt from the *Suffolk County Comprehensive Plan 2035.* It is a visioning initiative for the

County, as such; it provides the economic data for the county, our sponsor. The County is not

only home to the vast majority of our students, faculty, and staff, but it is also home to many of

the business, educational institutions, profit and not-for-profit institutions that welcome our

graduates. To be sure, the economic status of the County informs the College, and vice versa.

Part II is A *First Research* industry report. It was generated via Hoover's online

databases on the current state of community colleges. The report provides a national context in

which to view community colleges as an economic entity.   Highlights from the report are

presented. When comparative information on the College is available, it will be found in *italics;*

thus, the Hoover-generated report provides benchmarks to guide our understanding of trends

affecting the College.

The proliferation of partnerships across organization-type is as evident in the economic

environment, as it is in the political environment. Part III is devoted to current partnerships that

are underway that will most likely have an affect on the county, and directly or by extension, on

the College.
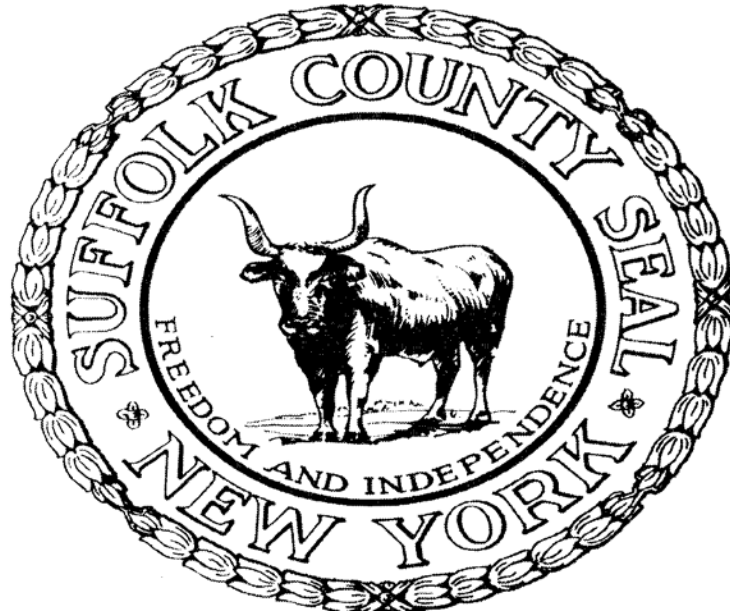
Much of what follows is excerpted from Suffolk County Comprehensive Plan 2035 (*2035*). The document was produced by the Suffolk County Planning Department in August 2011. Note that although *2035* is a plan for Suffolk County by Suffolk County, many of the metrics used in the plan are derived from national databases and therefore address the Nassau-Suffolk metropolitan region. Note too that the data derived from national databases is current as of February 2011.

The report paints a fairly sanguine economic picture for Suffolk County. Importantly, it notes that the county "has remained relatively stable in the face of the recent downturn." ([2035 -

<u>Economy</u> p. 3-1)[46] [47]. According to a metric that measures economic output, gross metropolitan

product, the Long Island region (i.e., Nassau-Suffolk counties) is in the top 20 metropolitan areas

in the nation. Moreover, the region's economic output exceeds that of many countries.   The

U.S. Bureau of Economic Analysis indicates that the County's 2009 per capita personal income

was $48,691, ranking 6th highest out of the 62 counties in New York State and was 23% higher

than the national average. According to the U. S. Census Bureau, the 2009 median household

income in the County was $83,620, making it the 25th highest (in the top 1%) out of all counties

in the nation and placing it 67% higher than the median household income in the nation as a

whole. The County's average annual pay in 2009 amounted to $49,963 and ranked in the top 4%

of all counties in the nation. (<u>2035 - Executive Summary</u> p. 1-8)[48] The authors of the report

conclude that this is due to the fact that "Suffolk County has a skilled, well-educated workforce."

(<u>2035 - Economy</u> p. 3-1)[49]

Of course, this is not meant to suggest that Suffolk County has not been affected by the

recent economic downturn in the economy. By two related measures, employment and

unemployment, we see that number of jobs have decreased, most notably and as might be

expected, in 2009.   The following graph depicts employment in the Nassau-Suffolk region in

February of each year. See Figure 1 below**.**

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[46] Interestingly, the County has withstood other economic downturns, most notably the loss of defense jobs in the 1980s and 1990s. As a result, the economy has become more diversified in the past 15 years.

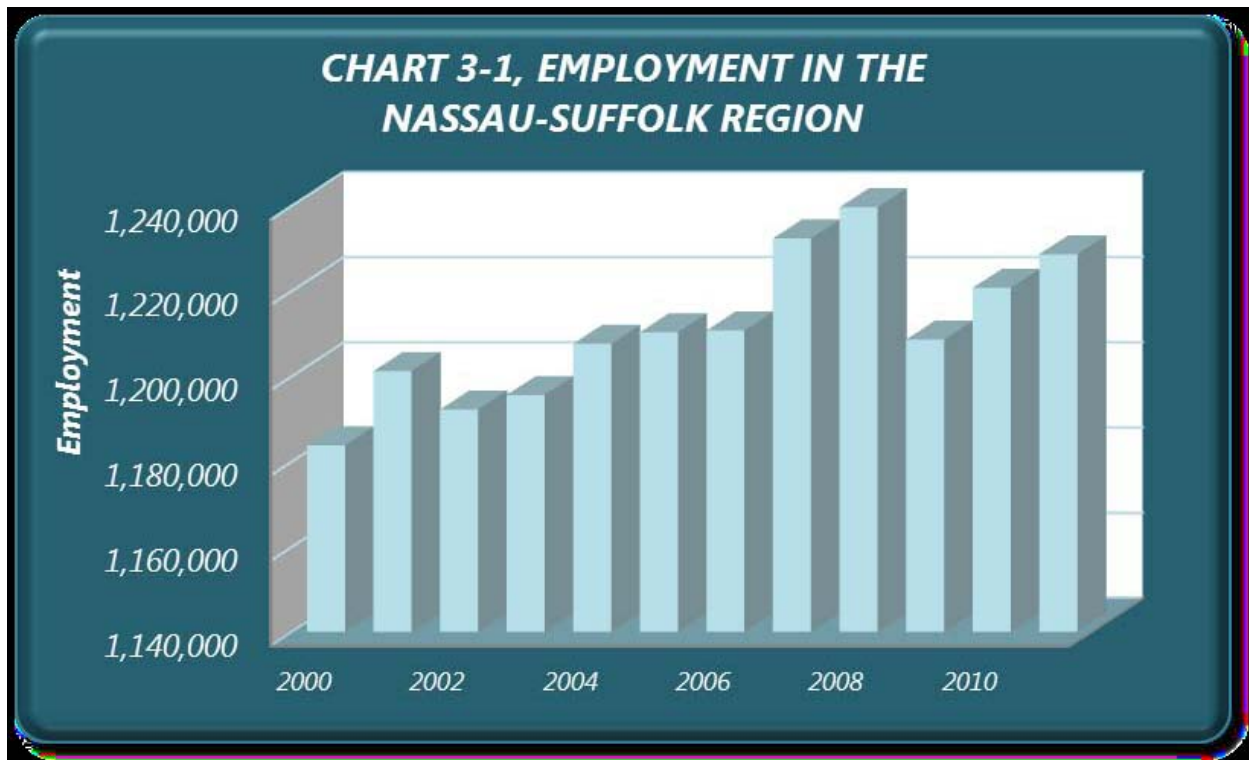[47] Suffolk County Comprehensive Plan 2035. Chapter 3: Economy. (p. 3-1)

http://www.suffolkcountyny.gov/Portals/0/planning/CompPlan/vol1/volume1chapter3b.pdf

[48] Suffolk County Comprehensive Plan 2035. Executive Summary. (p. 1-8)
http://www.suffolkcountyny.gov/Portals/0/planning/CompPlan/vol1/Vol1EXESUMRE8182011.pdf

[49] See FN 43.

Figure 1.

CHART 3-1, EMPLOYMENT IN THE NASSAU-SUFFOLK REGION

[2035 - Economy](#) p. 3-1

As seen in Figure 2, the current unemployment rate (as of 2/2011) for the region is 8.2%. Although significantly higher than 5% (the pre-economic downturn rate of February 2008), the region is experiencing a lower unemployment rate than both the state (New York State = 8.7%) and the country (United States = 9.4%). Data on unemployment rates for February 2012 finds the county to be in relatively the same condition (8.3% unemployment rate); while, the state has drifted higher (9.2%) and the nation's unemployment rate decreased more than one percent to 8.3%. ([Suffolk County Dept. of Labor Employment Trends - March](#))[50]

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[50] Suffolk County Department of Labor Employment Trends, April 2012

http://www.suffolkcountyny.gov/Portals/0/Documents%20and%20Forms/Labor/trends.pdf

Figure 2.

CHART 3-2, SUFFOLK UNEMPLOYMENT RATE (FEBRUARY OF EACH YEAR)
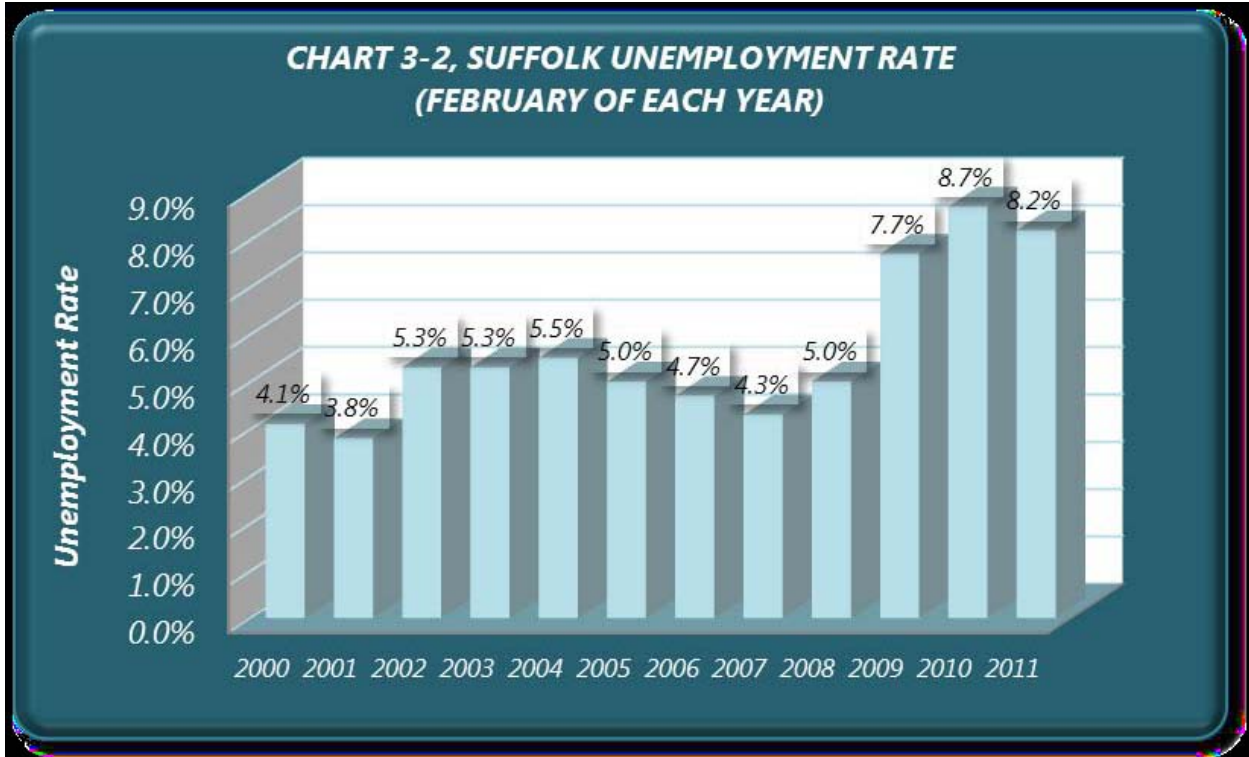
2035 - Economy p. 3-2

Although once dominated by manufacturing, specifically in the defense industry, the employment base on Long Island has become more diversified in the past 15 years. Growth sectors noted in *2035* are health, educational and social services, tourism, the arts, and several emerging technologies, notably bioscience technology. Long Island's bioscience research community is expected to continue to expand, and the major players are Cold Spring Harbor Laboratory, SUNY Stony Brook, Brookhaven National Lab, and the North Shore – LIJ Health System. (2035 - Economy p. 3-2)[51]

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[51] Suffolk County Comprehensive Plan 2035. Chapter 3: Economy. (p. 3-2)

http://www.suffolkcountyny.gov/Portals/0/planning/CompPlan/vol1/volume1chapter3b.pdf

For this reason, it is not surprising to see that as the economy began to rebound, employment growth occurred in education & health services (an increase of 6,500 jobs, up 2.9%), and leisure & hospitality (an increase of 3,400 jobs, or 3.7%). The categories wholesale trade, professional & business services, other services, transportation, and retail trade also posted small increases in employment. (2035 - Economy p. 3-1)[52]

Industry information on Suffolk County (only) comes from 2008 data provided by the U.S. Bureau of Labor Statistics. A retrospective look at the major industry categories reveals that the highest average annual pay was found in the finance & insurance industry. As of 2008 (the most recent data available), average annual pay in this sector was $134,800. Since 2008, pay may have decreased in this sector, as job losses have been significant (-8.2%). *Table 1* shows the industry categories with the highest average annual pay in Suffolk County, along with the percent change in jobs in these categories. (2035 - Economy p. 3-2)[53]

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[52] Ibid. 3-1

[53] Ibid. 3-2

Table 1 Highest Wage Industries, Suffolk County, 2008

Industry	Average annual Pay, 2008	% change in Jobs, 2003-2008 (Suffolk)	% change in Jobs, 2003-2008 (Nassau, Suffolk)
Finance & Insurance	$134,800	3.1%	-8.25
Management of companies & Enterprises	$97,600	-0.1%	0.0%
Wholesale Trade	$64,700	7.6%	-7.6%
Professional & Technical Services	$60,300	6.9%	-4.5%
Information	$59,800	-17.0%	1.9%
Government	$57,900	5.9%	1.3%
Manufacturing	$55,900	-0.9%	-12.2%
Construction	$54,700	12.9%	-2.8%
All Jobs	$49,800	6.2%	-2.8

Source: US Department of Labor, Bureau of Labor Statistics (2035 - Economy p. 3-2)

The lowest wage industries generally showed more favorable employment numbers. The lowest paying industry, accommodation & food service, saw a nearly 15% increase in jobs between 2003 and 2008 in Nassau-Suffolk, and a 1.3% increase in there since 2008. Table 2 details the average annual pay and change in jobs for the lowest paying industries in Suffolk County.

Table 2, Lowest Wage Industries, Suffolk County, 2008

Industry	Average annual Pay, 2008	% change in Jobs, 2003-2008 (Suffolk)	% change in Jobs, 2003-2008 (Nassau, Suffolk)
Accommodation & Food Service*	$19,000	14.7%	1.3%
Arts, Entertainment & Recreation	$25,200	20.6%	2.0%
Other Services	$27,600	5.6%	-1.9%
Retail Trade	$30,183	3.7%	-3.3%
Educational Services	$30,430	1.4%	2.8%
Agriculture, forestry & Fisheries	$33,600	-2.6%	NA
Administrative & Waste Services	$35,500	17.3%	-9.0%
Health Care & Social Assistance	$43,363	12.0%	4.8%
All Jobs	$49,800	6.2%	-2.8

Source: US Department of Labor, bureau of Labor Statistics (2035 - Economy p. 3-3)
*Note that more recent data on the "Nassau- Suffolk region found an additional 1.3% increase in employment in this industry.

A prospective look at industry growth for the Long Island region suggests that health care & social assistance will likely experience the greatest increase in occupational employment (+ 18.3%) or 33,560 more jobs, followed by professional & business services (+7.7% or 12,610 jobs) and educational services (+7.4% or 10,480 jobs). These data came from the NYS department of Labor. They represent employment/occupation projections for Nassau and Suffolk counties through 2018.[54] Table 3 (below) presents the potential for "opportunity" for the college. By recognizing the likelihood of growth in these employment/occupation areas, the college can be positioned to respond, by opening more sections within the various programs.

Table 3. New York State Department of Labor
Long-Term Industry Employment Projections (**Gains**), 2008 - 2018
Long Island
(Nassau and Suffolk Counties)

Industry Title	Employment		Net Change	Percent Change
	Estimated 2008	Projected 2018		
Health Care and Social Assistance	183,060	216,620	33,560	18.3%
Professional and Business Services	163,610	176,220	12,610	7.7%
Educational Services	142,470	152,950	10,480	7.4%
Accommodation and Food Services	77,710	83,600	5,890	7.6%
Arts, Entertainment, and Recreation	21,900	23,970	2,070	9.5%
Other Services	47,440	49,370	1,930	4.1%
Transportation and Warehousing	38,310	38,540	230	0.6%

New York State Department of Labor
Employment/Occupation Projections
http://www.labor.ny.gov/stats/lsproj.shtm

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[54] NYS Department of Labor Employment Projections http://www.labor.ny.gov/stats/lsproj.shtm

Conversely, the following data suggest a decline in employment opportunities for graduates – see Table 4.

Table 4. New York State Department of Labor
Long-Term Industry Employment Projections (**Losses**) , 2008 - 2018
Long Island
(Nassau and Suffolk Counties)

Industry Title	Employment		Net Change	Percent Change
	Estimated 2008	Projected 2018		
Manufacturing	80,970	63,240	-17,730	-21.9%
Financial Activities	75,090	66,560	-8,530	-11.4%
Construction	72,870	68,850	-4,020	-5.5%
Information	26,760	24,410	-2,350	-8.8%
Government	90,590	89,420	-1,170	-1.3%
Wholesale Trade	71,250	70,320	-930	-1.3%
Utilities	4,490	4,300	-190	-4.2%
Retail Trade	162,170	162,050	-120	-0.1%
Mining, Quarrying, and Oil and Gas Extraction	200	160	-40	-20.0%
Agriculture, Forestry, Fishing and Hunting	5,000	4,980	-20	-0.4%

New York State Department of Labor
Employment/Occupation Projections
http://www.labor.ny.gov/stats/lsproj.shtm

The Suffolk County – Comprehensive Plan 2035 - Economy (pp. 3-3, 3-4)[55] provides the following information on labor force, employment, and place of employment.

In 2008, 24 private employers each had more than 1,000 workers in Suffolk County. These employers cover a wide range of industries, including health care, telecommunications, banking, educational institutions, and department stores. The North Shore – LIJ Health System, a network of 15 hospitals and other health care centers, is Nassau-Suffolk's largest employer with

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[55] Suffolk County Comprehensive Plan 2035. Chapter 3: Economy. (p. 3-3, 3-4)

http://www.suffolkcountyny.gov/Portals/0/planning/CompPlan/vol1/volume1chapter3b.pdf

31,000 employees. The Winthrop Health System (hospitals), Stop & Shop supermarkets and Cablevision (telecommunications) each employ more than 6,000 on Long Island. The next largest employers are Verizon (telecommunications), Waldbaums supermarkets, Pathmark supermarkets, the Diocese of Rockville Centre, King Kullen supermarkets, Home Depot, Federated Department Stores, NationlGrid (utility), UPS, and CVS, each of which employ between 4,000 and 6,000 in Nassau-Suffolk. Other companies employing at least 2,000 in Nassau-Suffolk include *Newsday*, JPMorgan Chase, Citigroup, NBTY (manufacturer of vitamins and supplements) Estee Lauder (manufacturer of cosmetics) and Northrop Grumman (defense contractor). ([2035 - Economy](#) p 3-3)[56]

Large government employers in Nassau-Suffolk include 127 school districts which together employ 110,600 people (as of April 2011), state government which employs 24,100, and the federal government which employs 17,600 (including thousands of postal workers). Suffolk County government employs 11,000 people including police.

Through 2010, the number of businesses located in Suffolk County has held fairly steady despite the recent recession. There were more than 49,000 business establishments with payroll in 2010 in Suffolk, an all-time high and a 4% increase since 2005 (See Figure 3*)*. The largest numbers of businesses are in the construction category; followed by retail trade, professional & technical services, health care, and financial activities. Sixty-two percent of Suffolk's businesses employ fewer than five persons, and 78% of businesses in Suffolk employ fewer than 10 persons.

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[56] Ibid. p 3-3.

In addition, in 2008 Suffolk County had 116,875 "non-employer" firms, mostly self-employed individuals operating very small-unincorporated businesses. The number of these businesses has grown 6% since 2003 and their revenue amounted to $6.0 billion in 2008.

Figure 3.
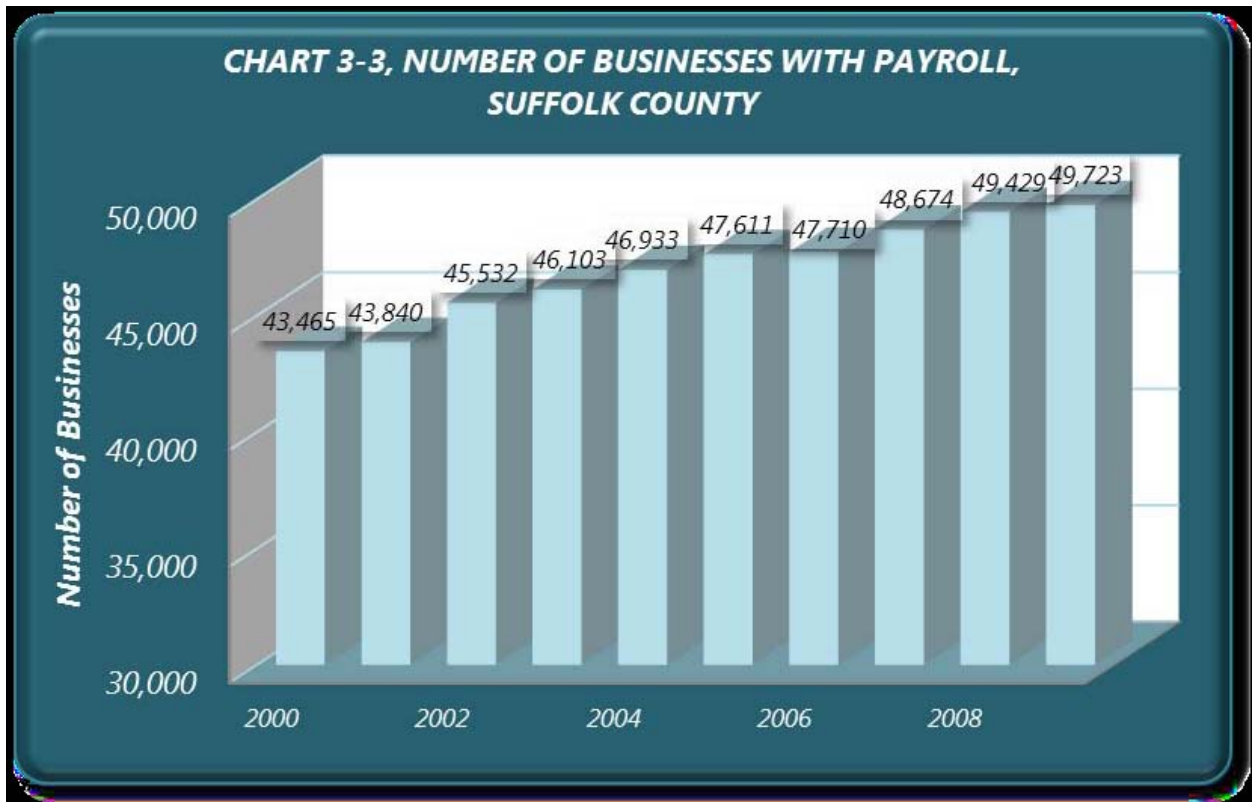
(2035 - Economy p. 3-3)

Place of employment - Suffolk County contains 17 communities which each contained more than 10,000 private sector jobs in 2008, according to the U. S. Census Bureau. Employment in these areas is high because of concentrations of office, industrial, or institutional development. The largest employment centers in Suffolk County are Melville, Hauppauge, and Farmingdale, which each contain more than 30,000 jobs. Melville alone has 56,000 jobs. [57]

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[57] Ibid. p. 3-3

Most Suffolk County residents work within the County's boundaries. As of the 2000 Census, the most recent data available, 73% of Suffolk County residents who work, work within Suffolk County. Another 14% work in Nassau County. 6% work in Manhattan, and 4% work in Queens. The remaining 3% work in Brooklyn and other areas off Long. – see Figure 4. Perhaps not surprisingly, Suffolk County Community College graduates follow somewhat similar patterns regarding place of employment, which favors local, county employment, over more distant options. However, in the case of SCCC graduates, typically 83% indicated that they were employed within Suffolk County, with an additional 13% indicating that they work either in Nassau County (8%) of New York City (5%)[58].

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[58] Data is found on the SCCC Graduate Follow-Up Survey 2010 and 2009 administrations. The survey is administered approximately one year after graduation from SCCC. http://instsrv.sunysuffolk.edu/gradfu09.htm

Note that approximately 4% indicated that they worked either upstate or out-of-state.

Figure 4.

CHART 3-4, PLACE OF WORK OF SUFFOLK COUNTY RESIDENTS, 2000

Legend:
- Suffolk
- Nassau
- Manhattan
- Queens
- Brooklyn
- Other
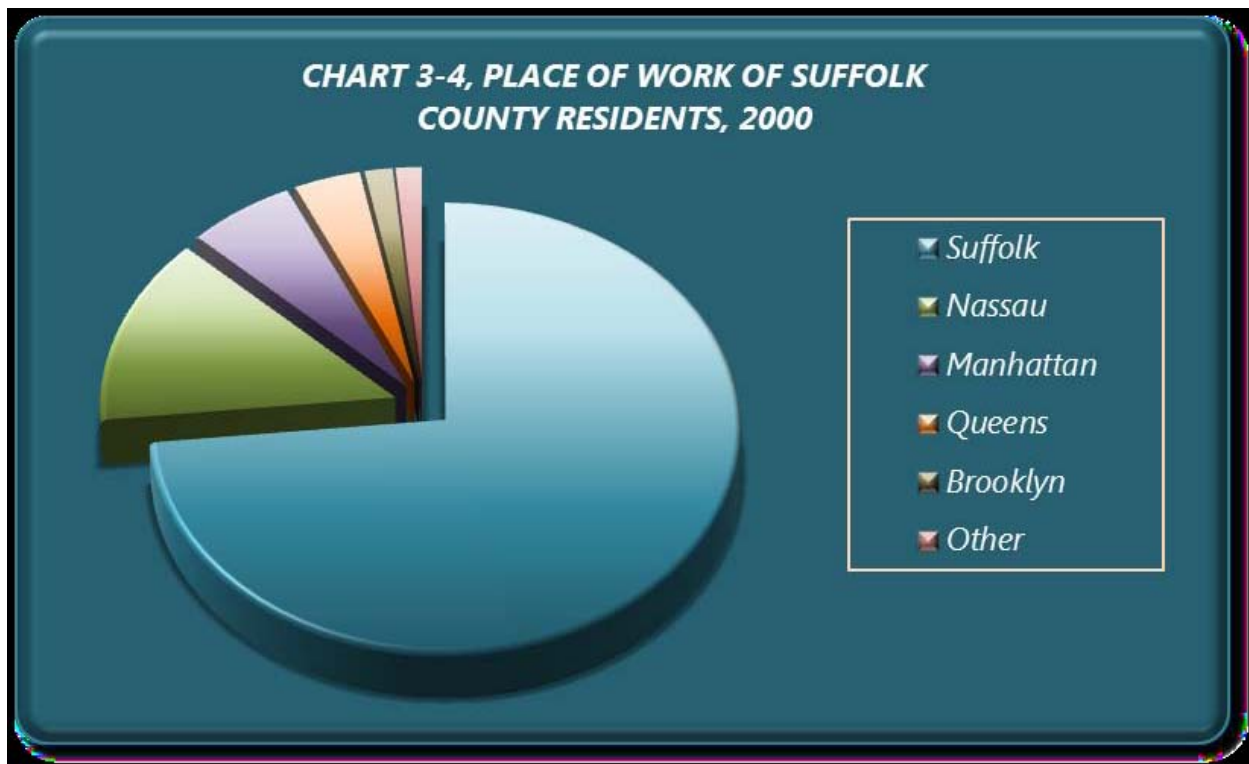
(2035 - Economy p. 3-4)

The Suffolk County – Comprehensive Plan 2035 - Economy (pp. 3-4, 3-5)[59] provides the following information on sales tax revenue and tourism & recreation.

Suffolk County's portion of the sales tax has remained at 4.25% since 2001 (New York State's portion is 4%). An MTA surcharge of 0.375% is also added, for a total sales tax of 8.625%. Sales tax revenue has increased in all but two of the most recent 14 years. The worst performing of the most recent 14 years was fiscal year 2009 when Suffolk County's sales tax

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[59] Suffolk County Comprehensive Plan 2035. Chapter 3: Economy. (p. 3-4, 3-5)

http://www.suffolkcountyny.gov/Portals/0/planning/CompPlan/vol1/volume1chapter3b.pdf

revenue decreased by 8.5%. See Figure 5. A major source of government revenue for Suffolk County, sales tax revenue in 2010 was up 6.5% from 2009. Sales receipts year to date 2011 ($604 million) show a slight improvement from the same time period in 2010 ($590 million).[60]

Figure 5.

CHART 3-5, SALES TAX REVENUE, SUFFOLK COUNTY
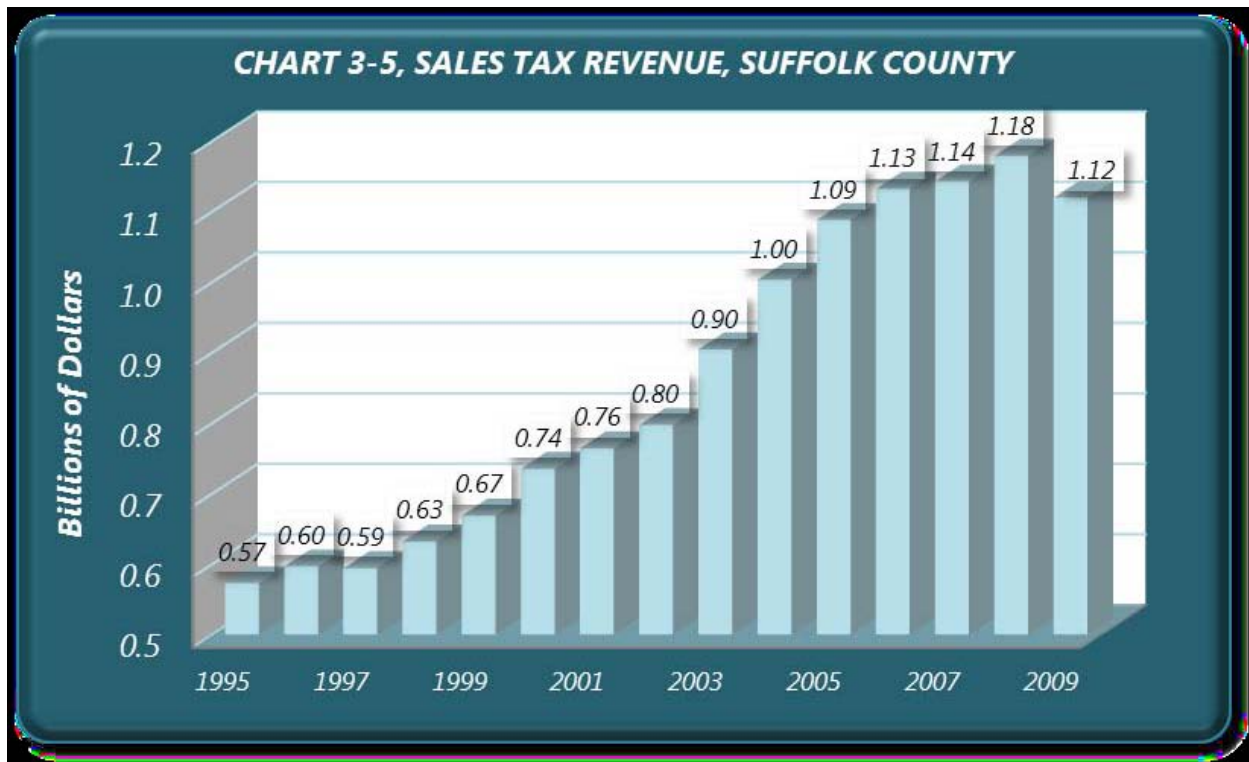
([2035 - Economy](#) p. 3-4)

Eastern Suffolk County is a major tourist and second-home destination, with one of the largest concentrations of second homes of any county in the United States. There are approximately 37,000 second homes in eastern Suffolk, which draw approximately 150,000 part-time residents with large purchasing power to the area during summer and on weekends. This

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[60] Suffolk County Comprehensive Plan 2035. Chapter 3: Economy. (p. 3-4)

http://www.suffolkcountyny.gov/Portals/0/planning/CompPlan/vol1/volume1chapter3b.pdf

second home economy adds considerably to the economy of Suffolk County, especially in the summer months. [61]

Eastern Suffolk County contains 5,500 lodging rooms, ranging from traditional motels to luxurious boutique hotels and bed & breakfast inns. These lodging properties draw thousands of tourists to Suffolk County's east end throughout the year, but primarily in the summer months. The population in eastern Suffolk increases by more than 200,000 persons during peak summer times due to tourism, more than doubling the year-round population. [62]

Suffolk County has 80 golf courses, including more than a dozen courses constructed since 2000. In 2002 and 2009, the U. S. Open was played at Bethpage State Park Golf Club in Nassau County near the border with Suffolk County. The 2004 U. S. Open was held at the Shinnecock Hills Golf Club in Southampton. [63]

Suffolk County's 6,000 seat ballpark, home to the Long Island Ducks independent league baseball team, opened in 2000 in Central Islip. Attendance at Ducks games at the park has been very high. In 2000, a new 42,000 square foot aquarium opened in Suffolk County, the Atlantis Marine World aquarium in downtown Riverhead. The aquarium attracts hundreds of thousands of visitors each year. A hotel adjacent to the aquarium has opened. In 2002, Stony Brook University completed its new $25 million stadium, the largest outdoor sports arena in Suffolk County, an 8,000 seat venue that is used for concerts and other events.[64]

Institutional development in Suffolk County continues to grow. The County is served by 69 public school districts. The combined budget for Suffolk's school districts for the 2010-2011

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[61] Ibid p. 3-4

[62] Ibid p. 3-4

[63] Ibid. p. 3-5.

[64] Ibid p. 3-5

school year was $5.6 billion dollars. Public school enrollment was 252,000 in the 2010-11 school year, which is a 4% decline from the number of students enrolled in 2005. In recent years, major school additions have been completed in many local school districts. However, enrollment is now declining and is projected to continue to slowly decrease over the next few years.

Many institutions that offer a variety of higher education opportunities are located in Suffolk County. There are seven four-year colleges which together had a total undergraduate enrollment of approximately 39,000 students and a total graduate enrollment of about 15,000 students during the 2009-2010 school year. Both Stony Brook University and Farmingdale State College have both expanded in recent years and enrollments continue to grow. St. Joseph's College in Patchogue acquired 25 acres of land on which it is building a new $12 million athletic complex to be completed in 2011. Dowling College's new $12.5 million outdoor athletic complex opened in early 2008. Suffolk County Community College, with more than 22,000 students and three campuses, continues to expand its facilities, with the 2007 opening of its 28,000 square foot Culinary Arts building in downtown Riverhead, and the 2011 completion of a $14.5 million new library at its eastern campus. Stony Brook University is the largest college in Suffolk County, with a 2009-2010 school year enrollment of 16,000 undergraduate and 8,000 graduate students in 2008. The University enrollment continues to increase and the University continues to expand its facilities. In 2005 Stony Brook acquired 246 acres of property in St. James in 2005 to eventually develop 10 buildings totaling 830,000 square feet, known as the Stony Brook Research and Technology Park. The first building, the 100,000 square feet Center for Excellence in Wireless Information Technology, opened in 2008. The second of these buildings, completed in 2011, was funded with a $35 million appropriation from New York State, and is home to the 50,000 square foot Advanced Energy Research and Technology Center. The third building is expected to focus

on biotechnology. In addition, $45 million was included in New York State's adopted 2008 budget for Stony Brook University to establish a law school. As enrollment at Stony Brook University continues to increase, the University continues to expand its facilities. In 2006, the University purchased the campus of Southampton College with funding provided by New York State, and although much of the Southampton campus was closed in 2010 and most academic classes were relocated to the Stony Brook campus, the Southampton campus still offers programs and classes. Farmingdale State College continues to expand with the 2005 addition of a $17 million, 400-bed dormitory. The College also plans to construct a new School of Business building with $29 million of State funds and a new $25 million student campus center is under construction and will be open by Fall 2012. Dowling College is planning a $16 million 87,000 square foot Student Center including a gymnasium and a new $12.5 million outdoor athletic complex opened in early 2008.[65]

There are 11 full-service hospitals in Suffolk County. According to the New York State (NYS) Health Department, Long Island hospitals are spending hundreds of millions of dollars on major construction projects to expand and modernize their aging facilities. Since 2000, the NYS Health Department has approved 107 hospital construction projects on Long Island, at a cost of $925 million. Stony Brook University Hospital is undergoing a five-year $300 million expansion and update of its three-building hospital campus, including the expansion of its emergency, surgical and obstetrics departments. In 2009, Peconic Bay Medical Center in Riverhead completed a $50 million expansion and renovation including the expansion of its emergency department and construction of a new 40,000 square foot surgical pavilion. [66]

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[65] Ibid p. 3-8 to p. 3-9

[66] Ibid p. 3-9.

Suffolk County is home to Brookhaven National Laboratory (BNL), an atomic energy research facility that employs 2,900 people. In 2007, BNL completed construction of its Center for Functional Nanomaterials, an $81 million, 94,000 square foot building whose construction was funded by the U. S. Department of Energy. Construction began on a new 87,000 square foot $66 million Interdisciplinary Science Building in October 2010 and is expected to be completed in summer 2012. BNL was chosen by the U. S. Department of Energy as a site for development of the National Synchrotron Light Source II facility which is now under construction. When it is fully functional in 2015, this $912 million facility is expected to provide unprecedented precision high-intensity light beams for use in medical, energy, and materials research. Recently, additional funding of $150 million under the American Recovery and Reinvestment Act of 2009 was awarded to this project and $162.1 million in funding has also been allocated for the continuing operation of the Lab's Relativistic Heavy Ion Collider. [67]

Construction was recently completed on an $86.6 million new Armed Forces Reserve Center on Route 110 in Farmingdale. This 225,000 square foot facility is a new base for 1,275 of Long Island's military personnel (the New York Army National Guard, Army Reserve, Naval Reserve and Marine Corps Reserve) and a command center in case of natural disaster or attack. The facility contains administrative offices, storage space for military equipment, classrooms, conference rooms and training areas for the maintenance and operation of military equipment. [68]

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[67] Ibid p. 3-9

[68] Ibid p. 3-9

PART II

HOOVER ONLINE DATABASES

A *First Research* industry report on the community was generated via Hoover's online databases on 3/11/2012. Highlights from the report are presented below. When comparative information on the College is available, it will be found in *italics*. The entire report is found in Appendix E.

Hoover's First Research Custom Report (Hoover) provides the following information on the competitive landscape for community colleges, U.S. consumer spending on higher education, and expected community college (industry) growth relative to other industries.

Competitive landscape. Demand for services depends on the demographic composition of the communities that surround a school. Because most are state-mandated institutions, community colleges often have some leeway in balancing their budgets. There is little competition among schools, because admission is usually restricted to residents of surrounding communities. A large proportion of students are part-time. Community colleges are capital-intensive: average annual revenue per employee is about $540,000.

Consumer spending. Consumer spending analysis is based on INFORUM's "interindustry-macro" economic model that captures the links between industries and the aggregate economy. US personal consumption expenditures for higher education, a major driver for community college revenues, are forecast to grow at an annual compounded rate of 3 percent between 2011 and 2016. (See Figure below and Appendix F.)

Figure 6.
    Consumer Spending Growth on Higher Education Stabilizes
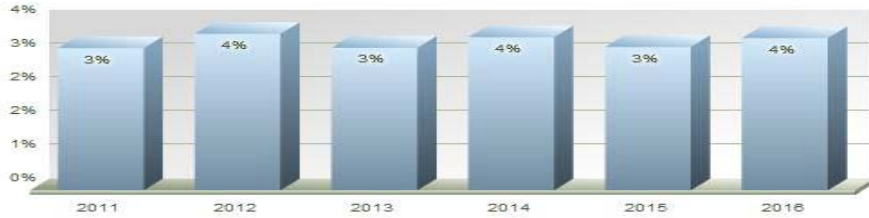
First Research forecasts are based on INFORUM forecasts that are licensed from the Interindustry Economic Research Fund, Inc. (IERF) in College Park, MD. Analysis based on data published October 2011

Industry Growth Rating

The First Research Industry Growth Rating reflects the expected industry growth relative to other industries, based on INFORUM's forecasted average annual growth for the combined years of 2009 and 2010. The forecast is based on analysis of demand to risk. Demand, in this case, is driven by community demographics, which must be offset by a combination of government funding, tuition and fees. The risked posed is the expected shortfall resulting from increased expenses and mandates as public financing shrinks. The graphic below indicates that expected community-college industry growth is forecasted as "medium."

Trends & Opportunities

Community-College Industry Trends

Hoover provides business trends and analysis within the community college sector and brief synopsis of the current status within the trend. The three trends identified are workforce training, preparing for university, and funding sources.

Workforce Training.

The rapid expansion of electronic and medical technologies in the past decade has increased demand for education in these fields, particularly for technicians to operate and maintain the technology infrastructure of computer hardware, software, and other electronic and medical machines. Community colleges, which have become the main source of training for workers in these fields, are also the main source of continuing education to help workers upgrade their knowledge and skills as technology changes. Many colleges operate apprenticeship programs and welfare-to-work programs.

SCCC. The College offers Corporate Training Center and the Entrepreneurial Assistance Center through it [Workforce Development](http://www.sunysuffolk.edu/workforce.asp) program.[69]

Preparing for University**.**

Many high school students go first to a community college and then transfer to a four-year, degree-granting institution. About half of community college students plan to transfer to a four-year school; some take classes at more than one school simultaneously; and others have

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[69] http://www.sunysuffolk.edu/workforce.asp

already earned some kind of postsecondary credential, such as a certificate, associate, bachelor's, master's, or doctoral degree.

SCCC. *A review of the records of Fall students enrolling in SCCC found that 42.9% had transferred to another institution within 3 years of entering SCCCC,[70] A study of new fall entrants Fall 2008 - Fall 2011, found that approximately 1% arrived at SCCC holding a post secondary degree (i.e., certificate through Ph.D.)[71] Information on students' cross-institutional enrollment is currently not available.*

Funding Sources.

Community colleges now receive grants from a variety of federal agencies, including the USDA, the Department of Education, and the National Science Foundation. The private foundation is another increasingly popular source of funding for community colleges. Most community colleges have their own foundations that help raise funds to serve the schools' missions but operate as independent nonprofits. Although these new sources of funding are promising, most community colleges are public institutions; therefore, most of their funds will continue to come from state and local coffers.

SCCC. *The [Suffolk County Community College Foundation](#) is a 501(c) 3 not-for-profit corporation formed to develop additional resources to enable the college to provide quality educational experiences for its students. Scholarship funds constitute the largest single use of the*

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[70] Note that the transfer data includes students who graduated from SCCCC. The study was conducted on the Fall 2007 FT FT non-developmental cohort. See Graduation, Persistence, Attrition and Transfer of Full-time, First-time Students in Associate Degree Programs – Office of Institutional Effectiveness, Fall 2011.

[71] This was "self-reported" data. Actual percentage may differ.

assets of the Foundation. Minority scholarships, honors scholarships, and awards based on

financial need and academic merit are funded by the Foundation Emergency student loans,

special projects for professional staff development, support for unique academic enrichment

programs, and efforts to enhance the community's awareness of the college and its services are

also supported by Foundation resources. The Foundation is governed by a board of directors

representing many diverse constituencies. Men and women from the professions, business,

industry, civic and social organizations, and college alumni serve without compensation to assist

the college in its mission to provide the highest quality of academic service to the citizens of

Suffolk County.[72]

Community-College Industry Opportunities

Please find the Hoover provided information on opportunities available to the community-college industry, presented below.

Responsive to community needs. States see public two-year colleges as more adept than universities at tailoring themselves to the immediate needs of community businesses and industries, and at adapting quickly to changing priorities. During times of economic change, community colleges can offer specific courses tailored to the current business climate in their area.

SCCC.   The College has an excellent record of being responsive to community needs. The College adds programs and courses as needed, as evidenced by requests from the SCDOL/SCDSS, the general public and emerging industry needs. For example, at the program

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[72] SCCC Foundation http://depthome.sunysuffolk.edu/Foundation/index.htm

level, SCCC created a credit-bearing health information technology (HIT) program as requested by SCDOL in May 2010. The Alliance for Long Island Agencies, Inc. requested the development of a program that would increase retention of their direct care employees; this program entered its tenth year in September 2011. The increase in interest in renewable energy and energy efficiency has led to a non-credit program and the beginning of development of a credit-bearing program.

Likewise, the college has demonstrated responsiveness at the course level. When the IRS and Brookhaven National Lab sought to provide college courses in a manner convenient for their employees, the Office of Continuing Education responded by providing credit-bearing courses at their locations. Moreover, the College's Special Topics course proposal procedure has institutionalized "responsiveness" for the college.   By providing employers with potential employees while providing the coop student with an opportunity to explore a career option while gaining entry-level learning experiences in new or emerging business sectors, SCCC's cooperative education/internship courses are responsive to changing business and community needs. A case in point is "Sports Marketing." Developed initially as a special topics course, the Business Department is currently exploring the need to develop a business minor in sports marketing.[73]

Business Partnerships.

Collaborating with communities and local businesses can benefit community colleges, especially with state budgets tightening. Due to severe state budget cuts, Central Piedmont

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[73] Special thanks to Deans Leonhardt and Laffin for contributing to this section.

Community College in Charlotte, NC, asked local businesses to "adopt a class" by donating the cost of a part-time instructor.

SCCC. As seen in the Political section of this report, the College has fostered and maintained numerous connections with the business community. Unlike the example provided above, these relationships have focused on curricular issues.

Childcare Services.

More community colleges now make on-campus child care available, an important consideration for single parents or families with one working parent. Many potential community college students are unable to enroll because they have no affordable or convenient child care while attending classes.

SCCC. The College offers child care facilities on two of its three campuses. For more information on the College's child care services, please see SCCC's Children's Learning Centers.[74]

Partnering with Universities.

Partnering with four-year colleges or universities, some community colleges are offering advanced courses that lead to bachelor's, master's, or PhD degrees. Such courses are designed by the partner university and may be taught by university teachers or community college faculty.

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[74] SCCC's Children's Learning Centers http://www.sunysuffolk.edu/Students/ChildLC.asp

SCCC. Currently, the College does not offer courses above the 2nd year level. But we do have partnerships, for example, the Liberal Arts and Sciences/Adolescence education programs – students are jointly registered with St. Joseph's College.[75]

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[75] See pages 145-154 of the 2010-2012 SCCC Catalog.

Trouble Funding Budgets

Because community colleges are funded primarily by the states, their budgets can shrink during periods of declining state revenues. Many states struggle with budget deficits, along with political demands to increase funding for community colleges.

SCCC. New York's public colleges and universities have lost $1.7 billion in state funding since 2008. To address this lost, NYSUT reached "Maintenance of Effort Agreement," under New York-SUNY 2020 legislation. This agreement establishes that the state will not diminish its aid for the next five years. An initiative to establish more full-time faculty was established. Last, NYSUT promises to protect community colleges from chargebacks.[76] (See [Hundreds Turnout to Support Higher Ed].) [77] NYSUT efforts have been successful as evidenced by the NYS budget passed in March 2012.

Growing Expenses, Government Mandates

Community colleges are spending more to manage the same number of students partly because of a greater responsibility (legal liability) for students and partly because of increases in

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[76] Chargebacks are tuition payments received by institutions for out-of-county attending students. NYSUT reported a victory regarding the NYS budget that was passed March 2012: The budget did not include a provision that would eliminate upper-division charge-backs at the Fashion Institute of Technology. http://www.nysut.org/cps/rde/xchg/nysut/hs.xsl/legislation_17670.htm

[77] NYSUT Communications, Darryl McGrath, March 14 2012 http://www.nysut.org/cps/rde/xchg/nysut/hs.xsl/legislation_17600.htm

state and federal mandates and programs. Spending at community colleges increased more than 25 percent between 2003 and 2009, according to the National Center for Education Statistics.

SCCC. The College found the same increase in spending (25%) between 2003 and 2009. According to the National Center for Education Statistics, SCCC's expenditures per FTE rose $2,378 dollars per FTE from 2003 ($9,388/FTE) to 2009 ($11,766/FTE).[78]

A combination of State mandated increases to pension costs and State aid reductions negatively impacted the College's budget by $3.2 million dollars (SCCC 2011-2012 Rec. Budget page i.) In a letter to the Community College, County Executive Steve Levy suggested that the College use its fund balance to offset its shortfall. He noted that the fund balance "is at an all-time high" of $15.5 million dollars. SCCC's current requested budget is $192.5 million. This is a 3.87% increase over last year's budget. The budget is primarily a cost- to-continue budget, with the exception of salary and benefits, including: Pension costs that are $2 million higher than last year, Health insurance costs that are $1.8 million higher than last year, and potential contractual increases.[79]

[78] AFT Higher Ed Data Center – Institutional Support -Suffolk County Community College
http://highereddata.aft.org/instit/institution/exp_fte.cfm?sid=201204300851280013

[79] Suffolk Community College Recommended Budget 2011-2012
http://www.suffolkcountyny.gov/Portals/0/countyexecutive/Budgets/2011-2012%20Recommended%20College%20Budget.pdf

Faculty Turnover

The average age of American professors is rising. In the next few years, campuses may experience a surge in faculty retirement. With instructor salaries low, community colleges struggle to attract and keep qualified teachers, which may lead to problems as schools lose experienced senior faculty leaders.

SCCC. *This is a likely scenario for SCCC in the coming years. The average age of SCCC teaching faculty for the Fall 2011 semester was 52 years of age – more than one-third were 59 years of age or older. Hiring is especially difficult for SCCC because of the high cost of living on Long Island.*
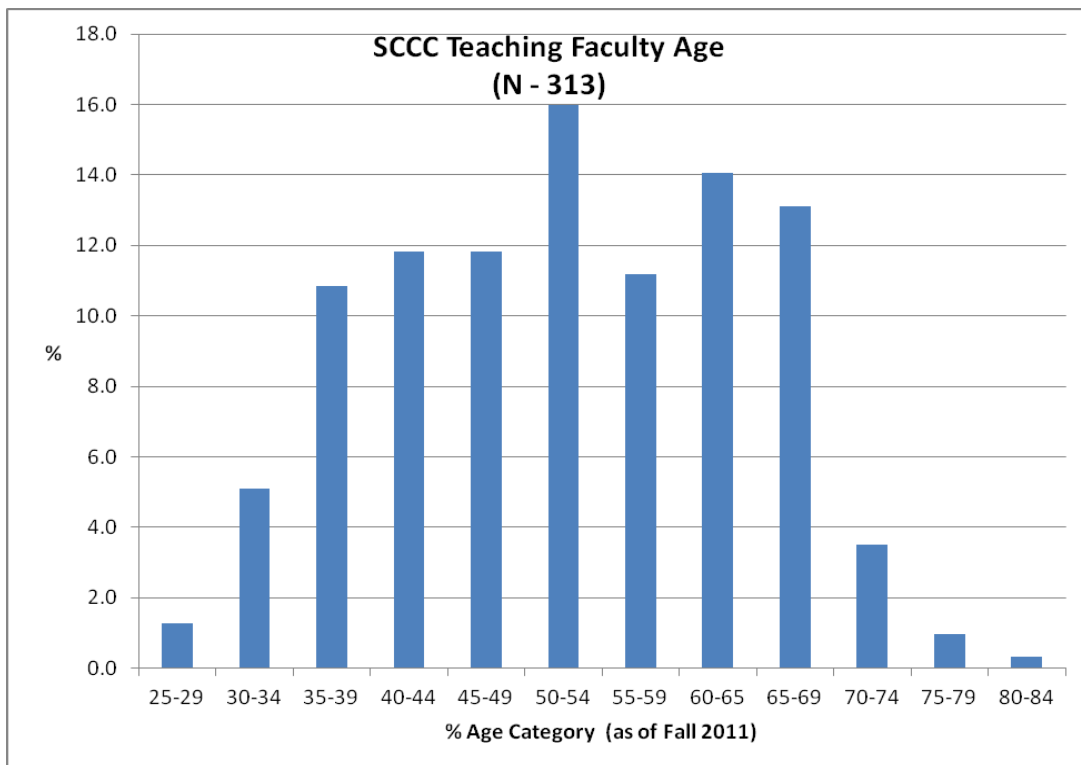
Data provided by the SCCC Office of Planning and Institutional Effectiveness. Note study was conducted on full-time faculty only

Competition from Internet Courses. Nontraditional and traditional colleges are increasingly offering courses and degrees over the Internet, negating two of the primary advantages of community colleges: local accessibility and low cost. So far, distance education has been hampered by the relatively high cost of computers and Internet connections, and by restrictions on the financial aid available to distance students, but these are only temporary drags on the fuller development of distance education.

SCCC D2L enrollments for Fall 2008 and Fall 2011 were 3,067 and 4,233, respectively. This was a 38% increase in D2L enrollments at the College. [80]

Negative Perceptions**.**

Long-held perceptions that community colleges are the postsecondary destination of last resort for those with limited resources have been challenging to the industry. Strong marketing by four-year universities and periods of economic stability make community colleges less enticing to potential students. High school teachers and administrators also often steer students toward four-year universities instead of community colleges out of a belief that their educational experience would be more rewarding.

SCCC. Findings from the SCCC focus group study support these perceptions. One of eight themes that emerged from the study directly addresses the issue presented above: "Enhance marketing and partnership efforts while improving image and correcting

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[80] Data provided by SCCC Office of Planning and Institutional Effectiveness.

misconceptions."[81] The report further adds that "There are many misconceptions about the College within Suffolk County"[82] further supporting the findings found in the Hoover Report.

[81] SCCC Internal Focus Group Report – Rationale, Questions, and Data: Office of Planning and Institutional Effectiveness, February 2011, p. 6.

[82] Ibid p. 31

PARTNERSHIPS

Long Island has a history of engaging in regional planning. :[Suffolk County Comprehensive Plan 2035 -Appendix A](#)"[83] provides a history of regional planning for Long Island, and by association, a history of creating partnerships – partnerships with federal, state and local governments, with civic and environmental organizations, with municipal departments and agencies, with education, health and welfare providers, and with research institutions. A brief review a few of these partnerships follows.

On July 27, 2011, Governor Cuomo launched the Long Island Regional Economic Development Council (LIREDC).   The purpose of the council is to "stimulate regional economic development and create jobs statewide … by restructuring the relationship between government and industry." The creation of the councils marks a shift towards partnering with stakeholders in each region. Upmost in this process is recognition of the role academia plays in economic development. Each council is lead by two regional co-chairs – one from business, the other form academia. SCCC's regional co-chairs are Kevin Law from the Long Island Business Association and Stuart Rabinowitz, President of Hofstra University. [84] A list of the General Members is found in Appendix C.

The Long Island Regional Economic Development Council advocates increased collaboration among academia, the private and public sectors and labor to protect and grow our

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[83] Suffolk County Comprehensive Plan 2035 - Appendix A
http://www.suffolkcountyny.gov/Portals/0/planning/CompPlan/vol1/vol1_appendixa.pdf

[84] *Governor Cuomo launches Long Island Regional Economic Development Council*. Governor's Office, Press Release. http://www.governor.ny.gov/print/815

advanced manufacturing base while encouraging innovation in the life sciences, information technology, clean energy, defense and homeland security industry clusters.

New York State has made available $1 billion dollars in state funding to the regional councils for projects they determine to be part of their regional strategy. Long Island Association Feb 29, 2012. [85]

The Long Island 2035 Visioning Initiative was established to help achieve a regional public consensus on where the next generation of Long Islanders could live and work, the transportation systems needed to support these settlements and the public and private actions required to ensure a prosperous, equitable and environmentally sustainable Long Island. This is a multiphase project. The Long Island 2035 Regional Visioning Initiative was funded by the New York Metropolitan Transportation Council (NYMTC). . The project's findings are being used to help the Long Island Regional Planning Council produce a Long Island 2035 Comprehensive Regional Sustainability Plan. The Study Team consisted of Regional Plan Association,   University Transportation Research Center (The City College of New York), Sustainable Long Island and Vision Long Island. The Sustainability Report will provide the details as to how to go forward. [86]

Accelerate Long Island is an initiative between Stony Brook University, Hofstra University, Cold Spring Harbor Lab, Brookhaven National Laboratory, and North Shore –LIJ health System (Feinstein Institute for Medical Research). Under the leadership of Supervisor

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[85] Long Island Association (LIA) Economic Development

http://www.longislandassociation.org/economic-development-programs.cfm

[86] A critique of the Long Island 2035 Regional Visioning Initiative can be found in the Suffolk County – Comprehensive Plan 2035 Appendix A pp 75. . Specifically, the report notes that Long Island 2035 Regional Vision Initiative is a multi-phase project that lacks funding. Only the first phase has been funded. Therefore, the report questions whether subsequent work on this project will include "extensive public input."

Mark Lesko, Accelerate LI is a plan to connect research with entrepreneurs/start-up companies to "unlock the economic potential of the world class research conducted at these institutions." It is projected that the next steps for Accelerate LI will follow the business model of the Long Island Housing Partnership in that it will be formed under the auspices of the Long Island Association.[87]

The Long Island Index is a project that gathers and publishes data on the Long Island region in order to engage the community to think about "our region and its future" (LI Index)[88] The project is underwritten by the Rauch Foundation. The governing board of the Long Island Index, the Advisory Committee, is composed of leaders from Long Island's business, labor, academic and nonprofit sectors. (Appendix D.)

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[87] A report on the proposed plan "Accelerate Long Island" can be found on the North Shore LIJ website
http://www.northshorelij.com/NSLIJ/Accelerate+Long+Island

[88] The Long Island Index http://www.longislandindex.org/

Economic Implications for Suffolk County Community College

1. A review of economic trends sheds positive light both on the County and on the College. Despite the recent economic downturn, the County "has remained relatively stable." The Long Island region (i.e., Nassau-Suffolk counties) is in the top 20 metropolitan areas in the nation for economic output. This is attributed to Suffolk County having a skilled, well-educated workforce. More good news on the economic front: The first increase in community college base aid since 2007-2008 occurred this past March when the recently passed NYS budget increased aid to community college students by $150 per full-time equivalent. A review of the College finds it well positioned to partake or increase participation in the following trends and opportunities identified in a recent national report on the economic state of community colleges: workforce training, business partnerships, childcare services, and partnering with universities. The College has a successful history of engaging in partnerships, which has led to some of the College's most prominent successes (e.g., STEM and other grant initiatives). The following are a list of current Long Island based partnerships whose spheres of influence are likely to affect the College, and the College in turn, may want to have a voice in shaping their direction: Long Island Regional Economic Development Council (LIREDC), The Long Island 2035 Visioning Initiative, Accelerate Long Island, and the Long Island Index. [IG: *Student Success, Communication, Access & Affordability*, *Diversity*]

2. The national report referenced above identified the following areas as likely to present challenges to community colleges in the coming years: trouble funding budgets, growing expenses, government mandates, faculty turnover, and negative perceptions of the community college experience. The College will, no doubt, be vulnerable on some of these fronts as well. [IG: *Student Success, Communication, Access & Affordability*, *Diversity*]

3. SCC graduates show a strong trend towards seeking employment on Long Island; therefore, preparation for the future Long Island job market will serve them well. The Long Island region is expected to experience job growth in the areas of health care, social work, professional business services, educational services, accommodation, food service, the arts, entertainment, and recreation. However, there is also a projected decline in employment opportunities in manufacturing, financial activities, construction, information, government, wholesale trade, utilities, retail trade, mining, and agriculture. Going forward, these facts may be used to inform programmatic and curricular decisions. [IG: *Student Success*]

SOCIAL AND TECHNOLOGICAL TRENDS

Technology has and will continue to shape the face of education. Moreover, technology is changing and determining many of the social forces that impact education and student experience. Distance Education takes advantage of evolving technology to remove barriers and deliver education to more students more of the time, and remains a huge part of the conversation moving forward. However, technology will impact education both in the co-curricular domain and "behind the scenes".

Distance Education [89]

According to the Hoover Index, a business database on community colleges, more community colleges are offering classes run partially or completely over the Internet; some have established complete online degree programs. Community colleges are lobbying to ease the restrictions on federal financial aid that disfavor distance learning. In the interim, groups of community colleges (Colorado Community College On-Line, ccconline.org; Utah Electronic College, uec.org) are making joint efforts among community colleges within their state, pairing online students with the nearest community college for financial aid and other services.

Distance education is being used for both college level work and remediation. For example, one Pearson Learning Solutions (The Chronicle of Higher Education) webinar, *Creating a Successful College Readiness Program*, recently focused on the Kentucky Community and Technical College System (KCTCS) Online Learn on Demand, which is

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[89] Subsections referencing SCCC's current position with regard to technology were provided in email by Steve McIntosh. OPIE thanks him for taking the time and making the effort to put this information together in response to our request for the Environmental Scan.

designed to provide students both inside and outside of Kentucky the opportunity to complete certain programs, including any remediation, through the fully online courses that were developed(modularized and competency based) to allow students easy access and the ability to start at any time.

State University of New York Chancellor Nancy L. Zimpher in her 2012 State of the University Address, unveiled plans to "get down to business." The Chancellor vowed to capitalize on SUNY's "systemness" in order to lower cost, enhance productivity, and elevate the importance of degree completion within the country's largest comprehensive system of public higher education (SUNY News... 2012-01-09).[90] One of the productivity initiatives targets technology: referred to under 'Opening the Door to Online Education,' 'Open SUNY' has the potential to be the nation's most extensive distance learning environment, connecting students with faculty and peers across geographic boundaries and giving them access to the best in open educational resources. Using a combination of online courses, an expanded YouTube channel, and a new presence on iTunes U, Open SUNY will be launched in time for the Fall 2013 semester.

Since 2007-2008 SCCC has offered courses through the Desire2Learn (D2L) course management system. Each year over 500 courses/sections enroll 10,000 students in fully online (asynchronous) and blended (combining face-to-face traditional and online asynchronous) class meetings as a part of the instructional mix of course and degree opportunities available to our students. The College offers one business degree program entirely online.

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[90] http://www.suny.edu/sunynews/ 2012-01-09

The freedom to select fully online courses where there is no requirement to attend class at a pre-determined day and time meets the needs of both traditional students desiring flexibility in their class and work schedules, and the needs of non-traditional students who wish to balance their jobs, families and responsibilities with their ongoing studies. Blended courses offer similar flexibility in scheduling to all students and also provide the 'on the ground' social interaction of traditional F2F instruction by combining on-campus class meetings with online course content requirements. SCCC responds to distance and online learning needs providing nearly all online-based instruction servicing Suffolk County residents, both at a distance in our large service area and locally through traditional course co-enrolled students attending at Brentwood, Selden and Riverhead campuses.

Social Networking and Higher Education

Technology trends in the extracurricular world have expanding applications in higher education. Social Networking represents a rapidly expanding trend – an interaction between the Social and Technological areas of the Context Map – that can have impact across the college. The data supports this perception. A 2010 literature review on social media and higher education conducted by the Association for Information Communication Technology Professionals I Higher Education (ACUTA), [91] includes a section of ACUTA committee members recommended reads, as well as abstracts from cited works with such thought provoking titles as "Higher Education as Virtual Conversation," "Cyber 'Pokes': Motivational Antidote for Developmental College Readers," and "Wikis, Digital Literacies, and Professional Growth." Multiple blog sights on social media and education (e.g., doteduguru.com, socialmediatoday.com, and

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[91] http://www.acuta.org/wcm/acuta/donna2/Handout/SC10/SC10SemerLitReview.pdf

socialmediabestpractices.worpress.com) discuss pros and cons, best practices, and creative applications. A 2011 study on social media use in higher education from the [Center for Marketing Research](#) at the University of Massachusetts Dartmouth, affirms that "colleges and universities are using social media, especially social networking sites, not only to recruit but to research prospective students." Moreover, "schools are now moving away from some tools and embracing others, demonstrating a more strategic approach to their online communications."[92]

All sources point to the expanding importance and potential applications of social networking/media in higher education: social media use in the classroom, uses of social media by libraries, student relationships via social media, use of social media in admissions, outreach, or engagement, etcetera.

Technology Infrastructure and Operations

SCCC's Office of Computer and Information Systems suggests the following are going to be significant national, regional, and local trends in information and instructional technology in Higher Education[93]:

1. Diminishing resources to fund technology infrastructure and operations.
2. Increased demands to provide fast network access (mobile in particular – think smart phones and tablets).
3. Bandwidth issues, or more to the point, an inability to provide capacity to meet demand.

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[92] http://www.umassd.edu/cmr/studiesandresearch/socialmediaadoptionsoars/

[93] Much of the text in this subsection was provided in email by Steve McIntosh. OPIE thanks him for taking the time and making the effort to put this information together in response to our request for the Environmental Scan.

SUNY is currently positioning itself to address diminishing resources. One of the efficiency measures in the SUNY Chancellor's Address also targets technology infrastructure: referred to as 'Crossing the Digital Divide.' SUNY is presently moving away from a policy and process that allowed every institution to determine its own information technology resources. By summer 2013, a plan for all SUNY campuses to operate on common Information Technology (IT) data systems will be in place, and by summer 2014, these systems will be implemented system wide. The Chancellor's initiatives would consolidate IT services and seek potential savings associated with University-wide licensing, contracts, and services (such as the SUNY Learning Network and using one university-wide Learning Management System similar to the deployment of ALEPH for libraries), with every SUNY sector institution participating – at minimal cost to each college – in such ventures.

Some will see this as a radical departure from the old model, in which institutions partnered, as needed, and belonged to shared resource agencies such as ITEC and SICAS to share common hosting and programming. However, other massive public higher education institutions across the country have been doing this sort of thing for years now; SUNY has been very, very slow in moving toward regionalization of IT services and resources. The potential savings across SUNY and its member institutions is huge and the overall bargaining power with vendors and providers will increase. SUNY's net gain in efficiencies should provide greater capacity to respond to change while managing daily operational needs at scale across the University.

Regionalization of provision of IT hosting and programming services is also going forward. Systems in SUNY will no longer have to depend solely on ITEC in Buffalo and System Administration in Albany as primary and secondary computing center nodes. There is good potential for a greater distribution of these critical computing centers, including having one on Long Island or elsewhere Downstate and others created Upstate.

There is a lot going on in information and instructional technology within System Administration and key planning groups in SUNY right now. Change is coming – fast – for SUNY, it is at light speed.

Social and Technological Implications for Suffolk County Community College

1. If and when efforts to reduce financial barriers to distance education across county, state, regional, or national lines are successful, that success brings with it opportunities and challenges. Suffolk County residents will have more options without financial penalty. SCCC will have greater opportunities to capture out-of-county students and faculty. However, SCCC will need to be competitive, both to take advantage of the 'Open SUNY' initiatives and to attract the discerning online student/faculty member. This means not only a good selection of courses, but programs that can be completed entirely online; evidence that online degrees represent equivalent experience (knowledge and skills, including laboratory components); comprehensive student support services, including but not limited to admissions, placement testing, advisement, financial aid, enrollment, counseling, tutoring and remediation); and valuable co-curricular opportunities (clubs, internships, conferences, mentoring, and networking). [IG: *Student Success, Community Development/Societal Improvement, Access& Affordability, Institutional Effectiveness, & Communication & Diversity*]

2. Taking advantage of social media/networking offers many opportunities, and what would appear to be a potentially huge return on each investment. Failure to do so would represent an increasing threat as our competition takes advantage of these technologies. [IG: *Student Success, Community Development/Societal Improvement, Access& Affordability, Institutional Effectiveness, & Communication*]

3. In technology infrastructure and organization, consolidation for financial advantage, efficiency, and productivity is key. Savings such initiatives will provide to SCCC, and to the SUNY System as a whole, is necessary to a balance of operating costs. Development of regional systems computing centers, with the possibility of locating one in Suffolk County offers advantages as well. [IG: *Student Success, Community Development/Societal Improvement, Access& Affordability, Institutional Effectiveness, & Communication*]

Note: The Environmental Scanning Committee recognizes that paradigm shifts in technological innovation occur quickly, such that strategic plans developed around generational upgrades can be rendered obsolete between order and delivery. Members of the committee recommend that an ongoing environmental scanning protocol include establishing a formal relationship with an industry expert and "visionary."

DEMOGRAPHIC TRENDS

Suffolk County's population grew exponentially in the 1950s and 1960s and its age distribution was disproportionately younger than the age distribution across the country, as a result of the young families relocating to the bourgeoning suburbs. By 2008, Suffolk County's age structure was more similar to the U.S. as a whole – due in large part to the "aging in place" of county residents from the 1950s through present day. Going forward, Suffolk County's population is projected to increase slowly: this increase is not uniform for the two age cohorts most traditionally or typically associated with enrollments at the college. While the young adult population (age 20-34) is expected to increase slowly, in sync with projections for the county as a whole, the current school-aged cohort (age 5-17) is expected to slowly decrease. This is important to the College because entering freshman students are derived from this cohort as they age through the years. Figure 1 below shows the growth of the populations of Suffolk and Nassau Counties from 1930 through the present (2012), and population projections through 2030. For further information on Suffolk County population please see the Suffolk County Comprehensive Plan 2035.[94]

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[94] Information found in the Suffolk County Comprehensive Plan 2035 – Chapter 2:Population (P2-1 to P2-4) http://www.suffolkcountyny.gov/Portals/0/planning/CompPlan/vol1/vol1_chpt2.pdf
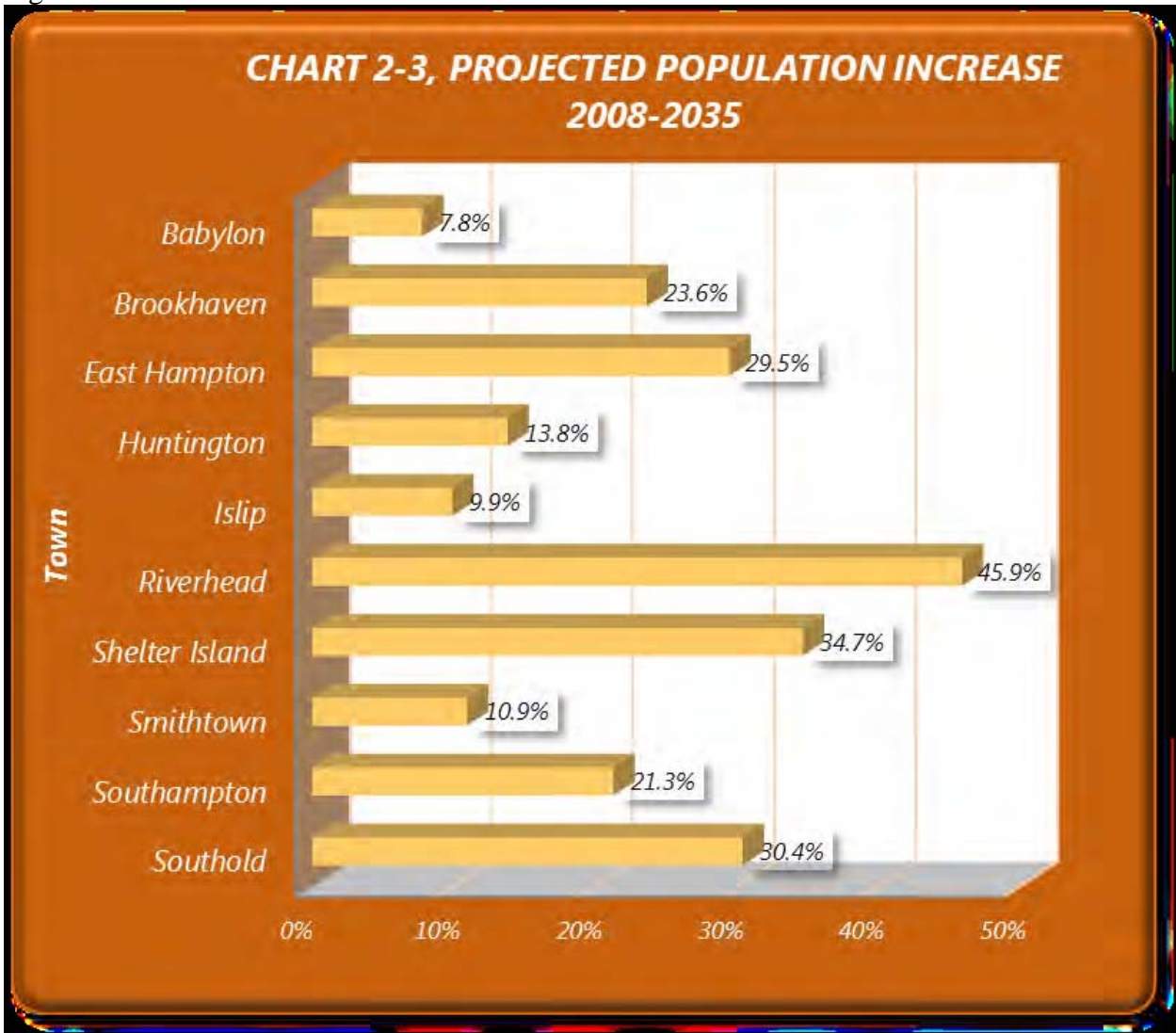
Figure 1.

CHART 1-2, POPULATION OF SUFFOLK & NASSAU COUNTIES 1930 TO 2035 PROJECTED
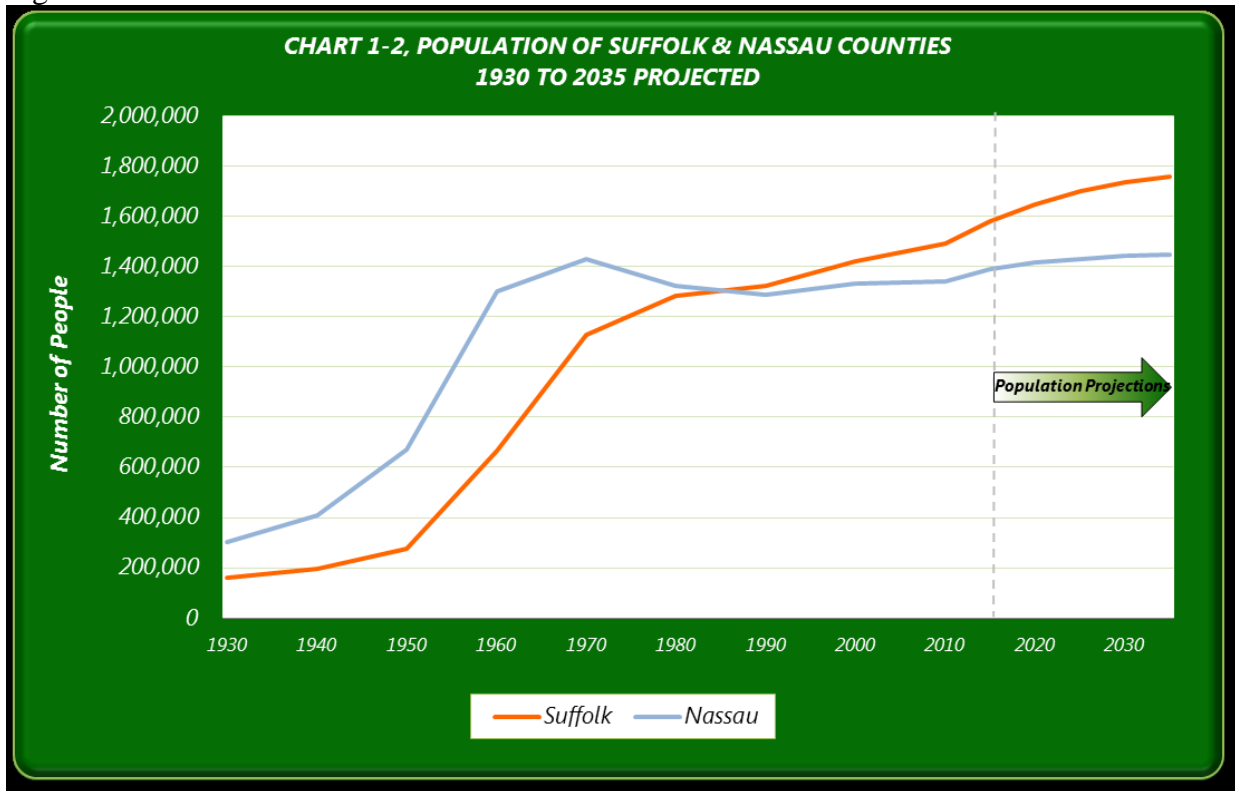
Suffolk County Comprehensive Plan 2035 Population 2-2

Population increases are expected county-wide, but projected growth will vary considerably from town to town. As seen in Chart 2, the East End of Long Island will experience the largest percentage increase in population in the next 25 years, with the Town of Riverhead projected to experience a population increasing the most (42%), followed by significant population increases in the remaining East End towns (Figure 2 below).

Figure 2.

CHART 2-3, PROJECTED POPULATION INCREASE 2008-2035

Town	Projected Population Increase
Babylon	7.8%
Brookhaven	23.6%
East Hampton	29.5%
Huntington	13.8%
Islip	9.9%
Riverhead	45.9%
Shelter Island	34.7%
Smithtown	10.9%
Southampton	21.3%
Southold	30.4%

Suffolk County Educational Attainment

A review of data on education attainment among county residents generally depicts county residents in a positive light. As part of the rise of educational levels nationwide, the educational attainment level of Suffolk County residents has steadily increased for more than fifty years. Moreover, on average, Suffolk County residents have achieved higher levels of education than the country as a whole. Specifically, 89.3% of the county's residents are high

school graduates; whereas, only 84.6% of Americans graduate high school. Similarly, 31.5% of county residents hold a bachelor's degree; compared to only 27.5% of Americans, nationally.

Analysis of educational attainment from 2005-2009 by town reveals that, at the high school level, all ten Suffolk County towns exceeded the national rate of 84.6%. Moreover, analysis of 4-year college attainment by town indicates that residents in eight of the ten towns graduate college at rates exceeding the national average. For data on degree attainment by town, please see Table 1, below, excerpted from the Suffolk County Comprehensive Plan 2035. [95]

Table 1

| Table 2-7, Percentage of Population Age 25 and Over That Are High School and College Graduates, 2005-2009		
Town	% High School	% 4 Year College
Babylon	86.7%	22.2%
Brookhaven	89.9%	28.7%
East Hampton	92.0%	44.8%
Huntington	93.0%	47.0%
Islip	85.3%	25.3%
Riverhead	87.8%	29.9%
Shelter Island	91.0%	49.6%
Smithtown	95.0%	42.1%
Southampton	89.9%	39.2%
Southold	90.7%	37.7%
SUFFOLK COUNTY	89.3%	31.5%
Nassau	89.8%	40.3%
USA	84.6%	27.5%

Source: US Census Bureau, American Community survey 2005-2009 (Suffolk County Comprehensive Plan 2035 P 2-7)

In further support of data depicting strong educational outcomes for Long Islanders, a study conducted for the Long Island Innovation Index 2012 reports that "Long Island students

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[95] Ibid. P 2-7

consistently outperform students from the rest of the state." (p.18) The metric developed by researchers at Hofstra University, classified students as 'college ready' if they scored a grade of 85%, or better on the NYS Regents exams in English, Chemistry, Physics, U.S. History, Global History, and the two highest-level Mathematics. Hofstra researchers then aggregate student performance within high school to provide a percentage score (College Ready/Total) for each high school in New York State. According to the researchers, broad-based superior performance reflects that graduates are prepared for the rigors of higher education. Figure 3, below, provides comparative data for Long Island students and NYS students from 2006 through 2010. [96]

Figure 3.

College Readiness
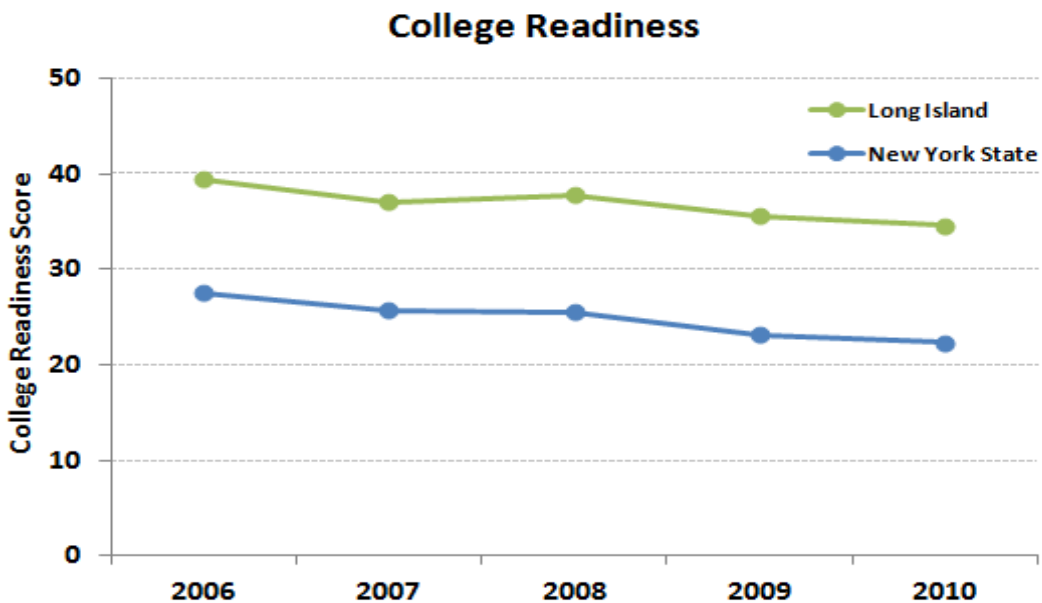
Data Source: New York State Education Department
Analysis: Hofstra University; Rauch Foundation

Long Island Innovation Index 2012 p. 18

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[96] Long Island Innovation Index
http://www.longislandindex.org/fileadmin/Reports_and_Maps/2012_Reports/Long%20Island%20Innovation%20Index%202012.pdf

Recent years have witnessed much discussion and concern over the County's "brain drain" or loss of these talented young people (See Long Island Index Press Release p. 2).[97] Suffolk County demographer, Seth Forman, Ph.D., challenges "Brain Drain" theory and postulates instead that it's a function of demographics, with a touch of "outmigration" due to college attendance. He maintains that "many of these college goers return to Long Island, sometimes after stints in New York or other cities as young careerists" and that this return "helps" raise the median household income of migrants coming to Suffolk county to $81,471 (1998 dollars) as compared to only $67,240 for those leaving Suffolk." (See Rethinking the Brain Drain Theory)[98]

<u>English Fluency</u>

Although the data demonstrates that many Long Islanders have experienced high academic achievement, many others face challenges in the educational process. The Suffolk County Comprehensive Plan 2035 reports that 19% of Suffolk County residents age 5 and over speak a language other than English at home; and, of these, nearly one-half do not "speak English very well." The majority of non-English speakers speak Spanish at home (57%). In Suffolk County, the highest concentration of people who do not speak English very well is located in the Town of Islip (52%). (See Suffolk County Comprehensive Plan 2035 P.2-9)

Going forward, the language gap will be most likely exacerbated. Findings from the 2010 census find that the Hispanic population on Long Island has increased 43% over the previous 2000 census, to over 400,000 people; the largest such regional increase in the state. Moreover, Suffolk County's Hispanic population increased by 96,828 people, the largest NYS

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[97] http://www.longislandindex.org/fileadmin/pdf/pressreleases/LIIndex2005PRESSRELEASE.pdf p.2.

[98] http://www.suffolkcountyny.gov/Portals/0/planning/LIRPC/LIRPCRethinkBrainDrain092011.pdf

increase in the absolute number of Hispanics, followed by The Bronx (+96,708) and Westchester County (+62,908). (Please see SOMOS New York for further information on Hispanic demographic issues)[99]

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[99] SOMAS can be found online at
http://www.suffolkcountyny.gov/Portals/0/planning/LIRPC/LIRPCRethinkBrainDrain092011.pdf

Demographic Implications for Suffolk County Community College

1. Changing demographics will require the college to support increases in courses, programs, services, processes, schedules, venues, and etcetera, to accommodate the needs of increasing non-traditional and ethnically diverse student population, with projected disproportionate increases at the east end of the county. [IG: *Student Success, Access & Affordability, Community Development/Societal Improvement, Communications, Diversity*]

2. Changing demographics calls into question traditional methods for measuring college success. The college will need to review, research, revise, and reaffirm assessment methodology with an eye towards sensitivity to diversity and measurement expertise. [IG: *Institutional Effectiveness, Diversity*]

3. Rethinking the Brain Drain Theory suggests that the County's adult population is and will continue to be a well educated one. Historically a large "college ready" populace represents a stable market for which to compete. [IG: *Student Success, Community Development/Societal Improvement, Communications*]

A Four-Part Schema for Categorizing Environmental Change

Environmental scanning is a process where one identifies "changes" in the environment. Lapin (2004) referred to the process as "trend spotting." He states that when embedded within the strategic planning process, environmental scanning "improves the likelihood that the organization will be able to define its preferred future as opposed to reacting to an imposed future. [100] To assist this process, Lapin identifies four levels of change: trend, event, emerging issue, and wild card. A brief description of each is provided below.

Trend: The most important of these changes is the trend. Lapin notes that trends may vary in direction and origin; for example, trends may take on a linear form, but not necessarily so. With respect to importance to the college, it is easy to see how trends of an international dimension, are potentially impactful. However, it is equally important to remember that a trend could be of a national, regional, or merely a local nature, and still be of importance to the college.

Event: A short-term change, a one-time phenomenon in the external environment

Emerging Issue: Potential controversy arising out of a trend or event that may require some form of response

"Wild Cards" **(of Change)**: An event having a low probability of occurrence but an inordinately high impact, if it does occur.

As part of the environmental scanning process, the task group is conducting a review of pertinent issues identified by the College community and supporting data from a wide variety of sources: mainstream media, professional media, government agencies, corporate and non-profit foundations, academic associations, educational organizations, and teachers' unions, to name a few. You have been asked to identify a particular macro-environmental factor (or factors, if you choose) from the social (and demographic), technological, economic, or political (STEP) arenas. Upon reviewing an article/information that addresses your environmental factor(s) of interest, please follow the directions on the attached form. This process will be instrumental in categorizing and compiling the environmental scan findings for review by members of the SWOT task group, and eventually, by the Strategic Planning Council.

Please provide the following information on the article/information under review and staple the completed form to the referenced material.

---

[1] Lapin, J., (2004). Using external environmental scanning and forecasting to improve strategic planning. *New Forums Press, Vol. 11, (No. 2), Spring 2004* 105-122.

Please identify the STEP category that this information addresses. __ _____

This article/information identifies data that is best categorized as a(n)

Trend ___ ___ **Event _____** **Emerging Issue ____** **Wild Card _____**

Please provide a short statement describing the trend/event/emerging issue identified above.
_____
_____

Please proceed with the following questions if the data above is categorized as a Trend. Data categorized as an Event, Emerging Issue, or Wild Card does not require further evaluation.

Trend Data*

Listed below are the College's Institutional Goals. If the trend addresses a college Institutional Goal, please describe the connection in the space to the right of the goal.

Institutional Goal (IG)	Statement describing the nature of the connection between the IG and the trend identified above.
Student Success	
Community Development/ Societal Improvement	
Access and Affordability	
Institutional Effectiveness	
Communication	

Reference Information (as applicable):
Title: _____ _____
Journal:_____
Organization:_____
Website:_____ _____
Date (and, if applicable, other identifying information, e.g., Issue, Volume, etc.):_____
_____

*Note that we are addressing only the data that rises to the level of "trend."

Prepared by
_____

Environmental Scan Sources

Long Island Regional Planning Council

Final 2035 Visioning Report

http://www.lirpc.org/ArticlesDocuments.aspx?type=202

Articles and Documents

http://www.lirpc.org/ArticlesDocuments.aspx?type=201

Links and Resources

http://www.lirpc.org/LinksandResources.aspx

Suffolk County Planning Department

Suffolk County Comprehensive Plan 2035

http://suffolkcountyny.gov/Departments/Planning/SpecialProjects/ComprehensivePlan.aspx

Publications and Information

http://suffolkcountyny.gov/Departments/Planning/Information.aspx

Suffolk County Executive Office of Budget & Management

http://suffolkcountyny.gov/Departments/countyexecutive.aspx

http://suffolkcountyny.gov/Departments/CountyExecutive/BudgetandManagement.aspx

Suffolk County Department of Labor

Employment Trends

http://suffolkcountyny.gov/Portals/0/Documents%20and%20Forms/Labor/trends.pdf

New York State Department of Labor

Employment/Occupation Projections

http://www.labor.ny.gov/stats/lsproj.shtm

Long Island Association

http://www.longislandassociation.org/

Economic Reports

http://www.longislandassociation.org/lia_economic_reports.cfm

New York State Regional Economic Developmental Councils

Long Island Economic Development Council Strategic Plan

http://nyworks.ny.gov/themes/nyopenrc/rc-files/longisland/LongIslandsFutureEconomy.pdf

New York State Education Department

Statewide Plan for Higher Education

http://www.highered.nysed.gov/oris/documents/StatewidePlanforHigherEducation-FinalforPrinting.pdf

State University of New York

Reports and Publications

http://www.suny.edu/sunynews/sunyPublications.cfm

Community College Strategic Plan

http://web.monroecc.edu/Manila/webfiles/MCCMiddleStates/SUNYCCSTRATEGICPLANDraft.pdf

Long Island Index

Reports

http://www.longislandindex.org/Long-Island-Index-Reports.308.0.html

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Shore-Long Island Jewish Health System
Samuel Aronson, Director, Brookhaven National Laboratory
Dr. Calvin Butts, President, SUNY Old Westbury
Rupert Hopkins, President & Chief Executive Officer, XSB, Inc.

Elected Officials

Nassau County Executive
Suffolk County Executive
Town of Hempstead Supervisor
Town of Oyster Bay Supervisor
Town of Brookhaven Supervisor
Town of Islip Supervisor

Elected officials will serve in an ex-officio basis and will participate in discussions and the planning process. In regions composed of more than two counties (except for the New York City region), members will include:

- the chief executive or supervisor of each county; and
- the chief executive or supervisor of the three municipalities with the largest population (limited to one municipal representative per county)

10 Regional Economic Development Councils

- Capital Region (Albany, Columbia, Greene, Rensselaer, Saratoga, Schenectady, Warren, Washington)
- Central New York (Cayuga, Cortland, Madison, Onondaga, Oswego)
- Finger Lakes (Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming, Yates)
- Long Island (Nassau, Suffolk)
- Mid-Hudson (Dutchess, Orange, Putnam, Rockland, Sullivan, Ulster, Westchester)
- Mohawk Valley (Fulton, Herkimer, Montgomery, Oneida, Otsego, Schoharie)
- New York City (Bronx, Kings, New York, Queens, Richmond)
- North Country (Clinton, Essex, Franklin, Hamilton, Jefferson, Lewis, St. Lawrence,)
- Southern Tier (Broome, Chemung, Chenango, Delaware, Schuyler, Steuben, Tioga, Tompkins)
- Western New York (Allegany, Cattaraugus, Chautauqua, Erie, Niagara)

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Community Colleges

First ResearchCustom Report3/11/2012

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    - ▪ VP Sales / Marketing - Sales
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First Research®

Industry Custom Report
Community Colleges Last Updated | 11/28/2011

Industry Profile

NAICS CODES: 611210
SIC CODES: 8222

Industry Description

About 1,600 community colleges in the US receive combined annual revenue of about $55 billion. Sixty percent of community colleges are publicly operated and 40 percent are operated by private institutions. About 40 percent of the approximately 18 million undergraduate students in the US are enrolled in community colleges.

Competitive Landscape

Demand for services depends on the demographic composition of the communities that surround a school. Because most are state-mandated institutions, community colleges often have some leeway in balancing their budgets. There is little competition among schools, because admission is usually restricted to residents of surrounding communities. A large proportion of students are part-time. Community colleges are capital-intensive: average annual revenue per employee is about $540,000.

Economic Statistics and Information

Annual Construction Put into Place - Census Bureau
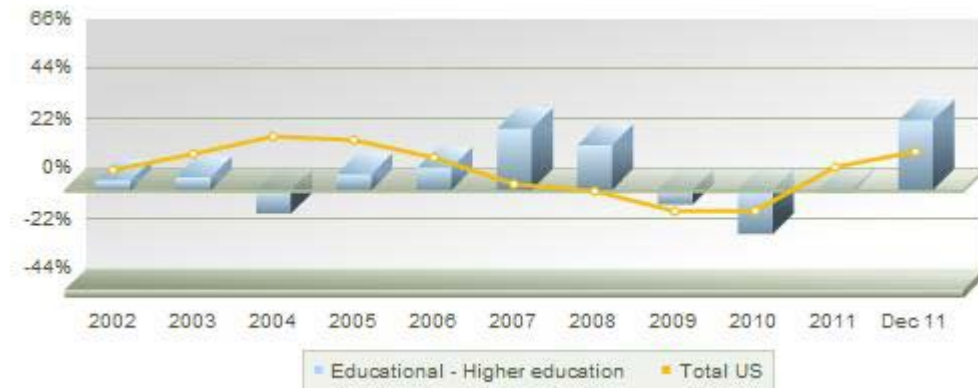
Economic Statistics and Information

Community Colleges

Valuation Multiple	MVIC/Net Sales	MVIC/Gross Profit	MVIC/EBIT	MVIC/EBITDA
Median Value	N/A	N/A	N/A	N/A

MVIC (Market Value of Invested Capital) = Also known as the selling price, the MVIC is the total consideration paid to the seller and includes any cash, notes and/or securities that were used as a form of payment plus any interest-bearing liabilities assumed by the buyer.
Net Sales = Annual Gross Sales, net of returns and discounts allowed, if any.
**Gross Profit** = Net Sales - Cost of Goods Sold
EBIT = Operating Profit
EBITDA = Operating Profit + Noncash Charges

SOURCE: Pratt's Stats™ (Portland, OR: Business Valuation Resources, LLC) To purchase more detailed information, please either visit www.BVMarketData.com or call 888-287-8258.

Industry Forecast

- *from Hoover's/D&B subsidiary First Research*
- US personal consumption expenditures for higher education, a major driver for community college revenues, are forecast to grow at an annual compounded rate of 3 percent between 2011 and 2016. Data Published: October 2011
- **Consumer Spending Growth on Higher Education Stabilizes**
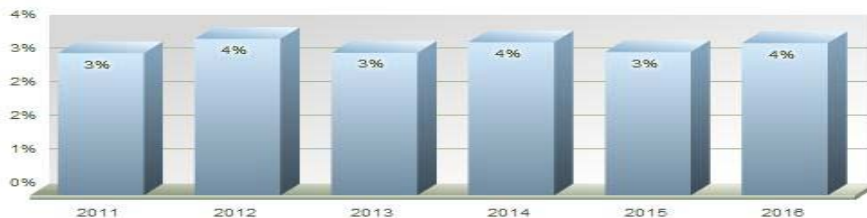
-
- First Research forecasts are based on INFORUM forecasts that are licensed from the Interindustry Economic Research Fund, Inc. (IERF) in College Park, MD. INFORUM's "interindustry-macro" approach to modeling the economy captures the links between industries and the aggregate economy.

Industry Growth Rating

The First Research Industry Growth Rating reflects the expected industry growth relative to other industries, based on INFORUM's forecasted average annual growth for the combined years of 2009 and 2010.

- Demand: Driven by community demographics
- Must offset government funding with tuition and fees
- Risk: Expenses and mandates increase as public financing shrinks

Trends & Opportunities

Business Trends

Workforce Training — The rapid expansion of electronic and medical technologies in the past decade has increased demand for education in these fields, particularly for technicians to operate and maintain the technology infrastructure of computer hardware, software, and other electronic and medical machines. Community colleges, which have become the main source of training for workers in these fields, are also the main source of continuing education to help workers upgrade their knowledge and skills as technology changes. Many colleges operate apprenticeship programs and welfare-to-work programs.

Preparing for University — Many high school students go first to a community college and then transfer to a four-year, degree-granting institution. About half of community college students plan to transfer to a four-year school; some take classes at more than one school simultaneously; and others have already earned some kind of postsecondary credential, such as a certificate, associate, bachelor's, master's, or doctoral degree.

Funding Sources — Community colleges now receive grants from a variety of federal agencies, including the USDA, the Department of Education, and the National Science Foundation. The private foundation is another increasingly popular source of funding for community colleges. Most community colleges have their own foundations that help raise funds to serve the schools' missions but operate as independent nonprofits. Although these new sources of funding are promising, most community colleges are public institutions; therefore, most of their funds will continue to come from state and local coffers.

Industry Opportunities

Responsive to Community Needs — States see public two-year colleges as more adept than universities at tailoring themselves to the immediate needs of community businesses and

industries, and at adapting quickly to changing priorities. During times of economic change, community colleges can offer specific courses tailored to the current business climate in their area.

Business Partnerships — Collaborating with communities and local businesses can benefit community colleges, especially with state budgets tightening. Due to severe state budget cuts, Central Piedmont Community College in Charlotte, NC, asked local businesses to "adopt a class" by donating the cost of a part-time instructor.

Distance Education — More community colleges are offering classes run partially or completely over the Internet; some community colleges have established complete online degree programs. Colorado Community College On-Line (ccconline.org) is a joint effort of the state's community colleges that pairs each online student with the nearest community college for financial aid and other services. Utah Electronic College (uec.org) is a joint effort of the state's colleges. Community colleges are lobbying to ease the restrictions on federal financial aid that disfavor distance learning.

Childcare Services — More community colleges now make on-campus child care available, an important consideration for single parents or families with one working parent. Many potential community college students are unable to enroll because they have no affordable or convenient child care while attending classes.

Partnering with Universities — Partnering with four-year colleges or universities, some community colleges are offering advanced courses that lead to bachelor's, master's, or PhD degrees. Such courses are designed by the partner university and may be taught by university teachers or community college faculty.

Executive Insight

Chief Executive Officer - CEO

Establishing Academic Excellence

Community colleges provide both "trade school" and college preparatory functions for the local community. College presidents set degree programs for associate degrees, and seek and maintain their school's accreditation. Community colleges provide a large number of local skilled employees such as computer techs, veterinary assistants, practical nurses, and opticians. Community college leaders work with their state four-year institutions to ensure their graduates can transfer full credits for their associate work.

Seeking Input from Local Industry Leaders

Community colleges usually serve a particular geographic region, providing academic and occupational instruction full-time, and part-time continuing education for working professionals. Occupational instruction is designed around skill competencies necessary for particular vocations. Community colleges solicit input from various local industry leaders to ensure that

appropriate skills are being taught to fulfill the needs of local businesses and to adapt quickly to changing priorities.

Chief Financial Officer - CFO

Funding Capital Improvements

State and local government provide a significant portion of the revenue of public community colleges. This government financing, along with tuition and fees from students, funds operational needs. Capital projects such as new construction and additional equipment are most often funded by bond issues, which often require local electorate approval.

Financing Budgetary Shortfalls

With many state governments having budgetary problems, many community colleges have seen expenses rise faster than government funding. Spending per student at many locations has increased much faster than inflation, in part due to states mandating increased programs and support. Many community colleges are forced to raise tuition and fees, and seek funds from the local business community to make up the shortfall.

Chief Information Officer - CIO

Creating and Maintaining Campus Network Facilities

A campus-wide network is necessary to connect students, faculty, and employees to computer facilities, and serves as a gateway to the Internet and remote computing systems. The network is especially important as community colleges increasingly promote themselves to local businesses for their electronic and medical technology capabilities.

Offering Distance Education

Community colleges service many part-time and continuing education students. Many colleges are updating their technological infrastructure to offer classes over the Internet to reach more students. Some colleges have even established complete online degree programs with minimum campus residency.

Human Resources - HR

Hiring Part-time Faculty

Community colleges generally offer a wide variety of programs, but sometimes serve a small number of students in these programs. Typically 70 percent of the faculty is made up of part-time instructors in specialized, but smaller, fields. Community colleges hire "non-educational" professionals to teach part-time, which minimizes expenses while adding a practical hands-on aspect to much of its instruction.

Recruiting Campus Workforce

In addition to faculty, community colleges employ a large number of utility, operations, and maintenance employees. Administrative offices recruit employees from the local community generally through help wanted ads online, in the local newspaper, or job fairs. Personnel departments also determine what job needs can best be handled by hiring an internal workforce or by outsourcing.

VP Sales/Marketing - Sales

Promoting Technology Instruction

Electronic and medical technology has expanded rapidly in the past decade, and community colleges have become a major source of training in these fields. Community colleges promote their technical vocational degree programs and continuing education opportunities for workers to upgrade skills. Many also offer internship and apprentice programs with local businesses.

Accommodating Diverse Student Needs

Community colleges attract a diverse student body of part-time and older students in addition to recent high school graduates. Many students are single parents or spouses of full-time workers, and the community college tries to meet their special needs. Most colleges provide onsite child-care facilities for their students and faculty. In states with large immigrant populations, teaching remedial English is increasing as a service to those populations and the community.

Business Challenges

Critical Issues

Trouble Funding Budgets — Because community colleges are funded primarily by the states, their budgets can shrink during periods of declining state revenues. Many states struggle with budget deficits, along with political demands to increase funding for community colleges.

Growing Expenses, Government Mandates — Community colleges are spending more to manage the same number of students partly because of a greater responsibility (legal liability) for students and partly because of increases in state and federal mandates and programs. Spending at community colleges increased more than 25 percent between 2003 and 2009, according to the National Center for Education Statistics.

Other Business Challenges

Faculty Turnover — The average age of American professors is rising. In the next few years, campuses may experience a surge in faculty retirement. With instructor salaries low, community colleges struggle to attract and keep qualified teachers, which may lead to problems as schools lose experienced senior faculty leaders.

Competition from Internet Courses — Nontraditional and traditional colleges are increasingly offering courses and degrees over the Internet, negating two of the primary advantages of community colleges: local accessibility and low cost. So far, distance education has been hampered by the relatively high cost of computers and Internet connections, and by restrictions on the financial aid available to distance students, but these are only temporary drags on the fuller development of distance education.

Negative Perceptions — Long-held perceptions that community colleges are the postsecondary destination of last resort for those with limited resources have been challenging to the industry. Strong marketing by four-year universities as well as periods of economic stability make community colleges less enticing to potential students. High school teachers and administrators also often steer students toward four-year universities instead of community colleges out of a belief that their educational experience would be more rewarding.

Call Preparation Questions

How does the college adapt to changes in state education budgets?

> Because community colleges are funded primarily by the states, their budgets can shrink during periods of declining state revenues.

What steps is the college taking to control operating costs?

> Community colleges are spending more to manage the same number of students partly because of a greater responsibility (legal liability) for students and partly because of increases in state and federal mandates and programs.

How does the college retain experienced faculty?

> The average age of American professors is rising. In the next few years, campuses may experience a surge in faculty retirement.

How responsive is the college to the changing needs of local businesses and the community?

> States see public two-year colleges as more adept than universities at tailoring themselves to the immediate needs of community businesses and industries, and at adapting quickly to changing priorities.

How does the college market itself?

> Collaborating with communities and local businesses can benefit community colleges, especially with state budgets tightening.

What advantages or obstacles do distance learning programs create for the school?

Industry Indicators

The bank prime loan rate, an indicator of community colleges' cost to finance construction, renovation, and other capital projects, remains at 3.25 percent as of the week of February 10, 2012, unchanged from the same week in 2011.

US personal income, which drives consumer ability to pay for higher education, rose 3.8 percent in December 2011 compared to the same month in 2010.

Quarterly Industry Update

Nov 28, 2011

Billions Spent on Dropouts — Nearly $4 billion was spent over five years on full-time community college students who dropped out after their first year, according to a study by the American Institutes for Research. One-fifth of full-time community college students do not return for a second year. At the same time, more federal and foundation money is flowing to community colleges as enrollment continues to rise -- more than 6 million students attended community colleges in 2010, a 25 percent increase from a decade earlier. Of the total spent on first-year dropouts, $3 billion came from state and local governments, $240 million from state grants, and $660 million from federal student grants. Some industry observers are troubled by the cost to taxpayers and suggest that community college students need more help to ensure that they return after their first year and ultimately graduate.

Aug 29, 2011

Community College Graduation Rates Still Low — Despite efforts to increase the number of college graduates in the US, community college graduation rates remain low, according to a review by MDRC, a social-policy research organization. Between 10 and 20 percent of community college students graduate in 3 years, according to The Hechinger Report. Students at community colleges may struggle with external factors that make completing a degree difficult, including holding a job while in school, family obligations, or not having basic math and English skills. Those obstacles, combined at some community colleges with difficulty in securing space in required courses because of high demand, help drive down graduation rates. Some community colleges have instituted programs such as tuition assistance, counseling, and peer mentoring to help boost graduation rates. Meanwhile, some states now award funding based on the number of students who end up with degrees instead of simply how many students are enrolled. In a difficult budget environment, improving graduation rates is likely to remain a challenge for many community colleges.

May 16, 2011

Faculty Salaries Flat — The average faculty salary at US colleges and universities rose at a slower rate than inflation for the second consecutive year in 2010, according to the annual faculty salary report by the American Association of University Professors (AAUP). The report,

which included data from community colleges, further found that faculty salaries have declined in purchasing power in five of the last seven years. Lingering recessionary pressures were cited as the primary culprit. Top administrators fared better than faculty members. For the years from 2007-08 to 2010-11, presidents of public colleges and universities received twice the average salary increase of faculty members, and presidents of private institutions received three times the average faculty salary increase, according to the AAUP.

Feb 14, 2011

Graduates' Earnings Compared — Community college graduates earn higher starting salaries than graduates of traditional four-year colleges and universities in many cases, according to the *St. Petersburg Times*. Career-focused associate's degrees or postsecondary certificates can garner a higher salary than bachelor's degrees from state universities. In Florida, community college graduates with science degrees earn $11,000 more per year than recipients of bachelor's degrees from state colleges in all fields. However, bachelor's degree recipients are more likely to receive promotions and earn more in the long term. The findings nonetheless suggest that community colleges can effectively cater to high-demand fields with a need for more workers.

Glossary of Acronyms

AACC
    American Association of Community Colleges
AFT
    American Federation of Teachers
CCSSE
    Community College Survey of Student Engagement
FTES
    full-time equivalent student
IPEDS
    Integrated Postsecondary Education Data System
NCES
    National Center for Education Statistics
NTS
    National Testing Service

Fast Facts

1. About 1,600 community colleges in the US receive combined annual revenue of about $55 billion.
2. Sixty percent of community colleges are publicly operated and 40 percent are operated by private institutions.
3. Community colleges offer mainly two-year programs of study that prepare students either for transfer to a four-year college or university, or for direct entry into the workforce; they also offer continuing education for workers.

1. Since community colleges are not selective about admissions and depend on local political support, they try to enroll the largest possible number of students.
2. Public community colleges rely heavily on support from state and local governments, while private community colleges get most of their revenue from tuition and fees.