

Community Colleges Today: The Presidents Speak Study

Presented by:
Rockbridge Associates, Inc.
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Overview

- Objectives and Methodology
- Summary of Key Findings
- Detailed Findings
 - Quality of Education and Challenges
 - The “Minority Majority”
 - Student Retention
 - Accountability and Funding
 - E-Learning
- Implications

Objectives

- Identify the top issues and priorities perceived by the leaders of community colleges in areas such as...
 - Educational Quality
 - Educational Access
 - Affordability
 - Retention
 - Accountability
 - E-Learning

Methodology

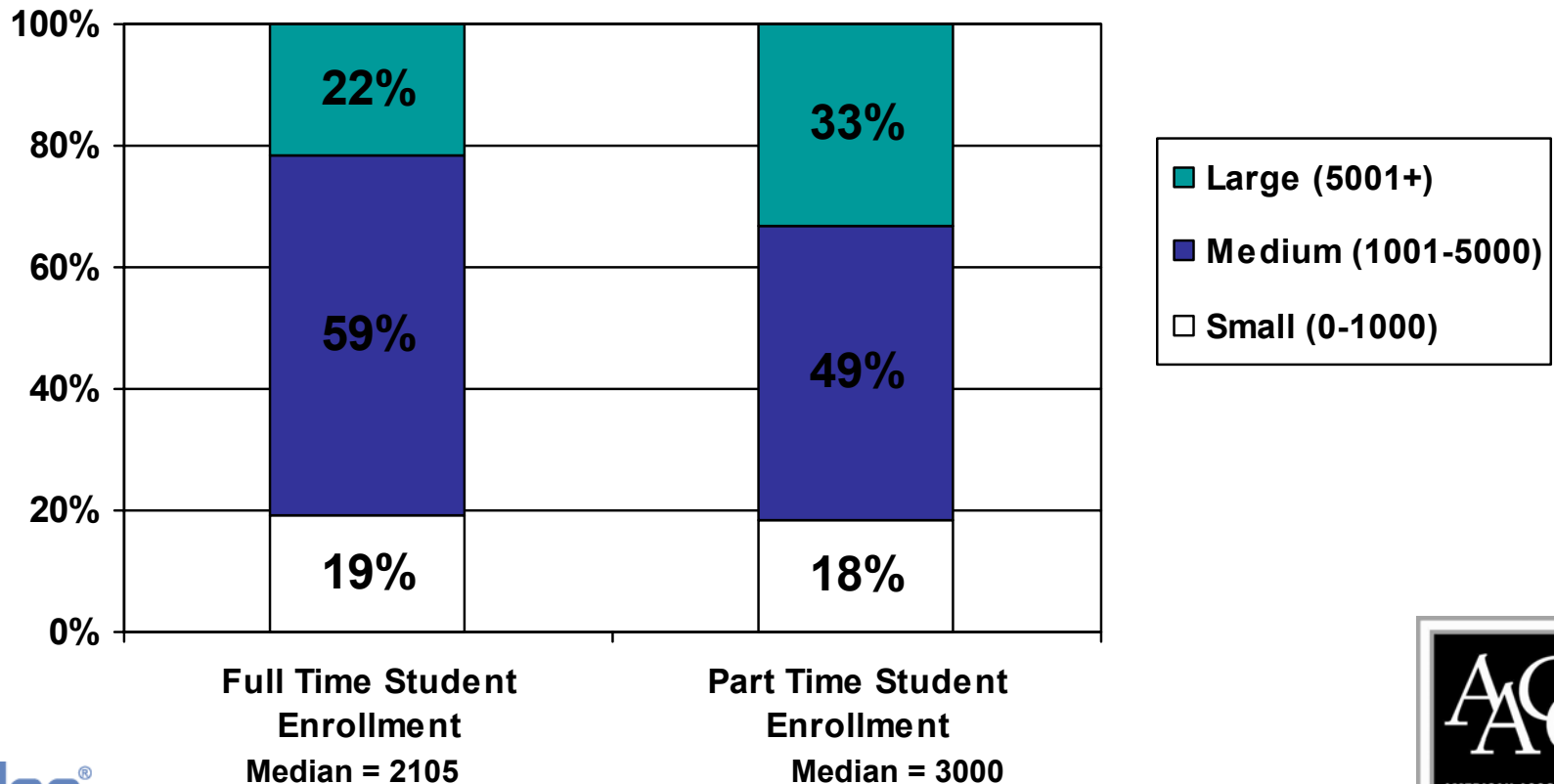
- Community College executives who are members of the AACC were contacted both by phone and email and given the chance to participate in a 10-15 minute survey on the priorities and challenges facing community colleges.
- Both web and phone surveys were conducted from February 23-March 15, 2006.
- Participants included CEO/COO level executives, and 88% of these were the presidents of their schools.
- Of the 251 completed surveys, 245 were completed online and 6 were completed over the phone.

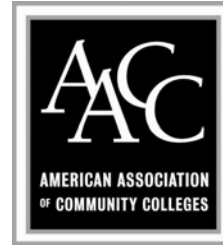
Note: All Surveys have a Statistical Margin of Error. In this study, the margin of error is plus or minus 6% points (95% confidence level).

Enrollment for Full-time & Part-time Students in Survey

- A fifth of the community colleges have an enrollment of over 5,000 full-time students and a third have over 5,000 part-time students.

Total Enrollment for both Full Time and Part Time Students





Summary of Key Findings

Community Colleges are Confident but Face a Variety of Challenges

- Community College Leaders are satisfied with the quality of a community college education in the U.S. today (78% are “extremely” or “very satisfied”).
- However, community colleges face a variety of challenges on a daily basis, the major issues being:
 - Student retention (87% consider this highly important)
 - Lack of state/local funding (86%)
 - Under-prepared students (84%)
 - Rising personnel costs (81%)
 - Rising technology costs (79%)
- When asked the single most important issue, a lack of state or local funding dominates (58% consider this #1).

Keeping Education Affordable in the Future will be an Issue for Some Colleges

- The majority of community college leaders feel that they can maintain affordability of education at their schools over the next few years – 61% consider it “very” or “somewhat likely” they can do so, while 39% feel it is “very” or “somewhat unlikely.”
- Need to Raise Tuition versus Decreased Financial Aid: Half of the colleges (46%) think the main challenge to affordability will be the *need to raise tuition*, while most others (43%) consider *tuition* and *decreased financial aid funding* to be almost equally important issues.

Community Colleges are Prepared for a “Minority Majority” Enrollment

- Anticipating the rise of a “minority majority” around the country, only 16% of community colleges are “highly prepared” and 57% are “somewhat prepared” to meet the demands of this changing student population.
- 33% of community colleges have a perceived “enrollment gap,” meaning minority candidates are not as likely to enroll.
- Of those who perceive an enrollment gap, 71% believe it will shrink or remain unchanged in the future, and 28% believe it will grow.

Colleges have a Variety of Strategies for Meeting the Needs of Minority Students

- The major strategies to address the new “minority majority” population include:
 - Assessment and placement in developmental classes
 - General outreach to the minority community
 - Outreach to minority high school and middle school students
 - ESL instruction
- One key to success may be the mindset of the campus: colleges that perceive they do not have an enrollment gap are more likely to rely on greater cultural sensitivity/awareness among faculty, and on teaching methods to accommodate cultural distinctiveness.

A Major Challenge Today is Retaining Students Until Graduation

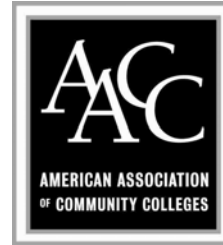
- 80% of community colleges consider retention of students until graduation to be a “major” challenge.
- More expect the problem of retention to grow in the future than diminish.
- The most common programs now in place to increase student retention include:
 - Tutoring (99% have such a program)
 - Academic counseling (99%)
 - Entering-student orientations (94%)
 - Personal Counseling (86%)
- Only 6% feel their colleges’ retention strategies are “very effective,” but 71% feel they are “somewhat effective.”

Community Colleges are Tentative in Acceptance of Performance-based Funding

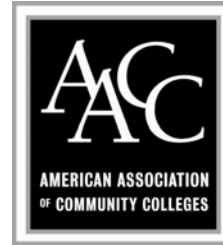
- Performance-based funding requires colleges to show that a certain percentage of registered students have either gone on to a senior college or secured employment...
 - 10% of these leaders consider this idea to be “very reasonable” and 48% consider it to be “somewhat reasonable”
 - Over a third do not consider this approach to be reasonable
- Almost half (45%) perceive community colleges to be at a disadvantage to other post-secondary institutions in regulatory requirements for state/local funding.
- Most of these leaders (71%) believe their local communities expect most funding to come from the state, and rarely from the local communities or the students.

Community Colleges are Embracing e-Learning

- 98% of community colleges now offer courses online.
- Half (48%) offer the same version of courses online as they do in-person, while almost half vary the curriculum depending on the particular course (46%).
- 94% of those offering online courses are planning to expand their course offerings.
- The major obstacles to expanding or introducing online courses for the first time is insufficient funding, while faculty resistance is an obstacle to a lesser degree.
- When comparing themselves to proprietary colleges, 33% feel community colleges are in the lead in e-learning, compared to 39% who feel proprietary schools are in the lead.



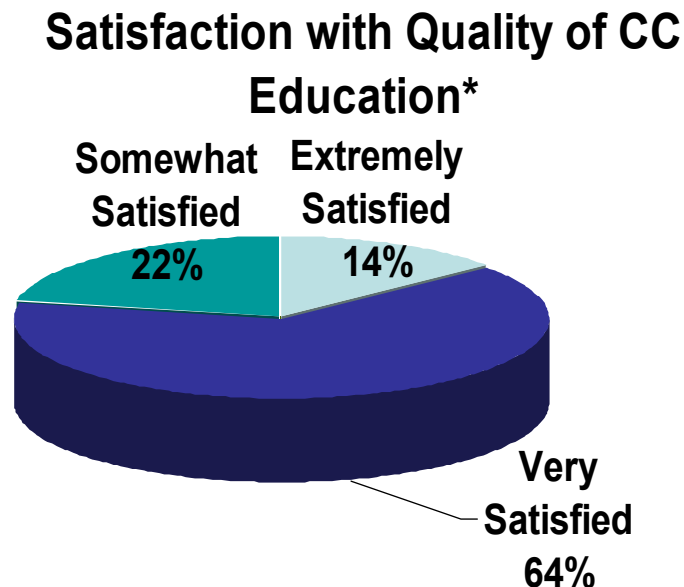
Detailed Findings



1. Quality of Education and Challenges Faced by Community Colleges

Leaders are Satisfied with the Quality of a Community College Education

- Over three-quarters are “very” or “extremely” satisfied with the quality of education at the nation’s community colleges.
- None are dissatisfied with the quality of a community college education.

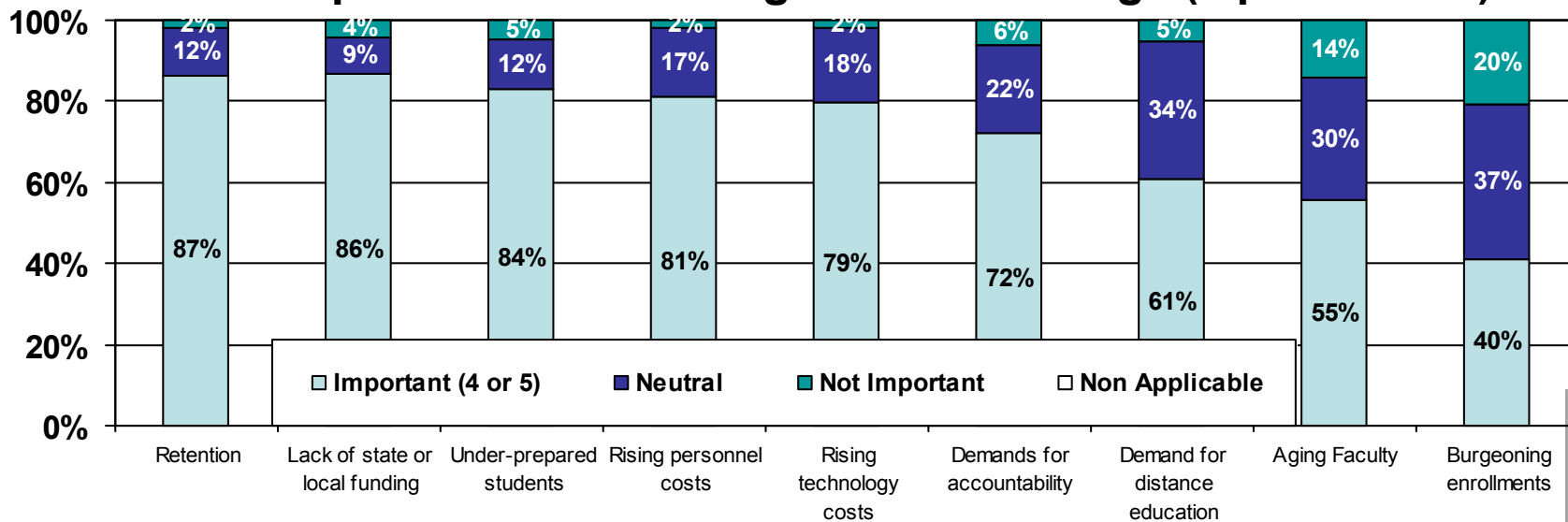


*Note: None were neutral or dissatisfied.

Community Colleges Face a Variety of Challenges on a Daily Basis

- The top issues confronting community colleges are student retention, lack of state/local funding, and unprepared students; other challenges include the rising costs of personnel and technology, and demands for accountability.
- When asked to choose the single most important issue, a lack of state or local funding dominated, being chosen by 58%.

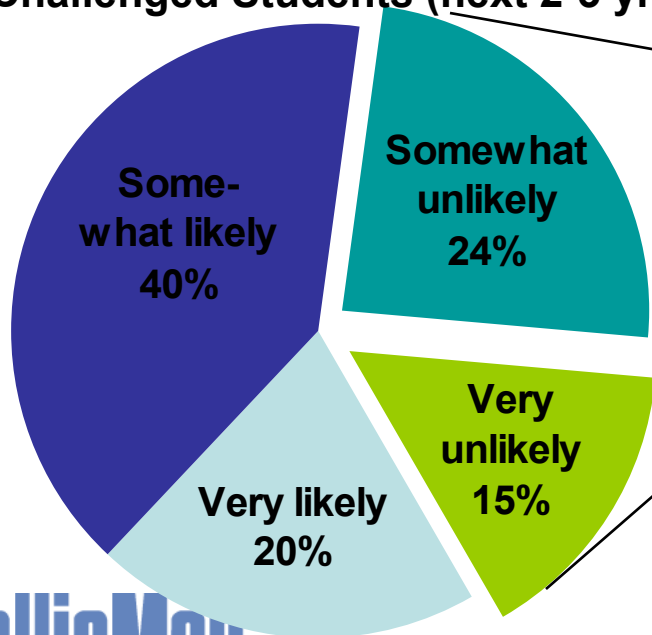
Importance of Challenge to Your College (5 point scale)



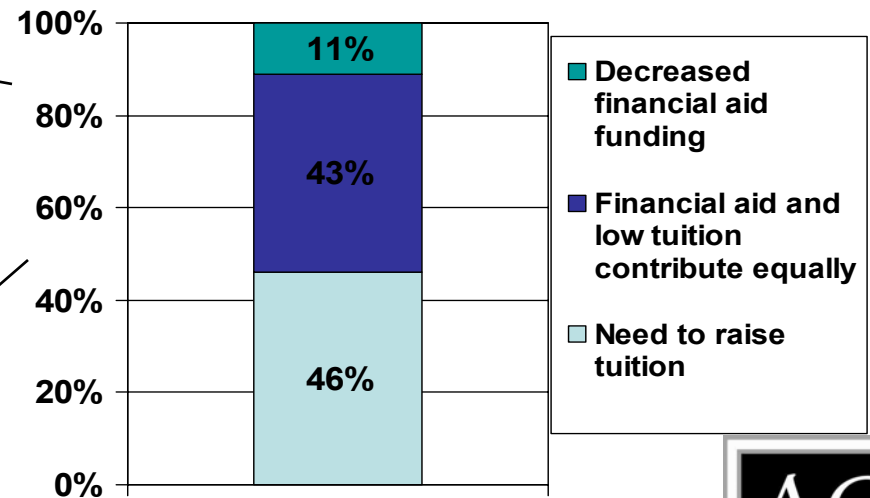
The Majority of Leaders Feel they can Maintain Affordability in the Future

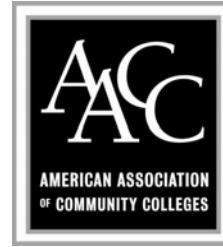
- In contrast, 39% feel it is “very” or “somewhat” *unlikely* they can maintain affordability for their most economically challenged students in the future.
- Of those who feel maintaining affordability is unlikely, the major factor is the need to raise tuition (as opposed to decreased aid funding).

Likelihood of Maintaining Current Affordability For Most Economically Challenged Students (next 2-3 yrs)



Factors Contributing Most to Affordability Issues at Community Colleges



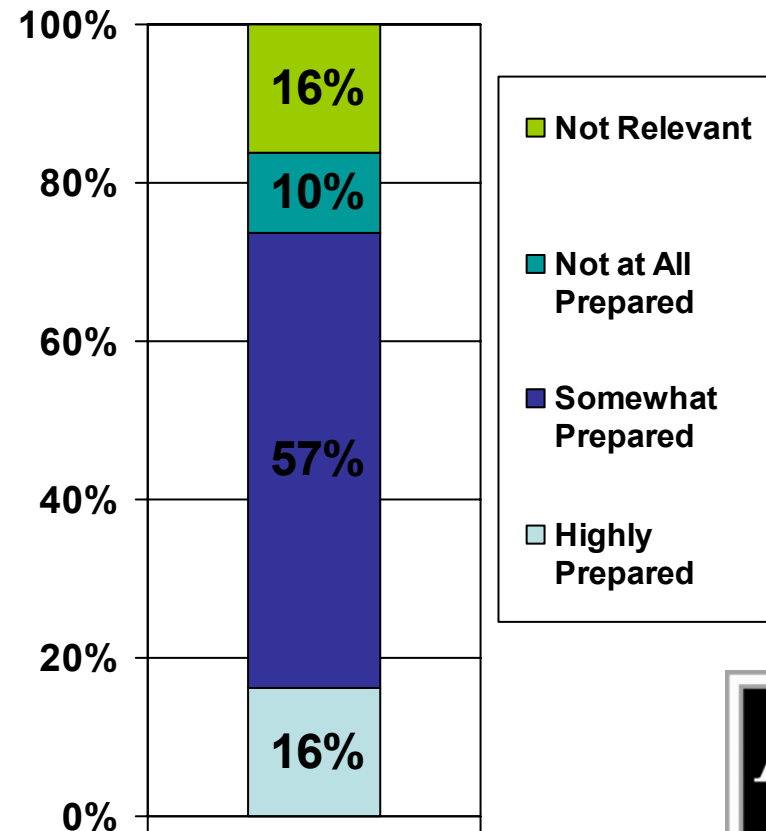


2. Meeting the Needs of the “Minority Majority”

Community Colleges are Somewhat Prepared for a “Minority Majority” Population

- Anticipating the rise of the “minority majority” in many states in the future, 16% of colleges are “highly prepared” and 57% are “somewhat prepared” to meet the demands of this new student composition.
- Only 16% feel this is not relevant due to their location.

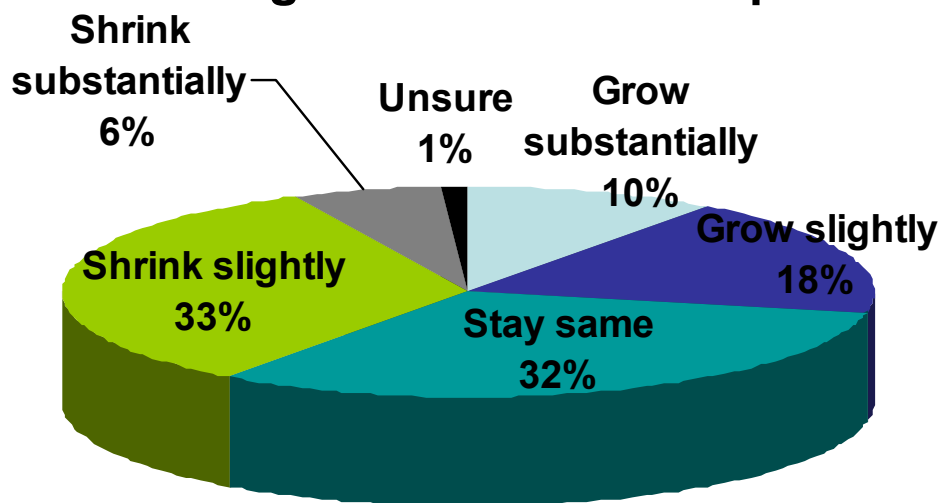
Preparedness to Meet the Demands of a Significant Minority Student Population



A Minority Enrollment Gap Exists at a Third of Colleges

- 33% believe their colleges have an “enrollment gap” in attracting minority students in their communities.
 - Of those who do not have a gap, only 10% expect one to emerge in the next 2 to 3 years.
- Of those who now have a minority enrollment gap, over two-thirds (71%) believe this will remain unchanged or shrink in the future, while a fourth (28%) believe the gap will increase.

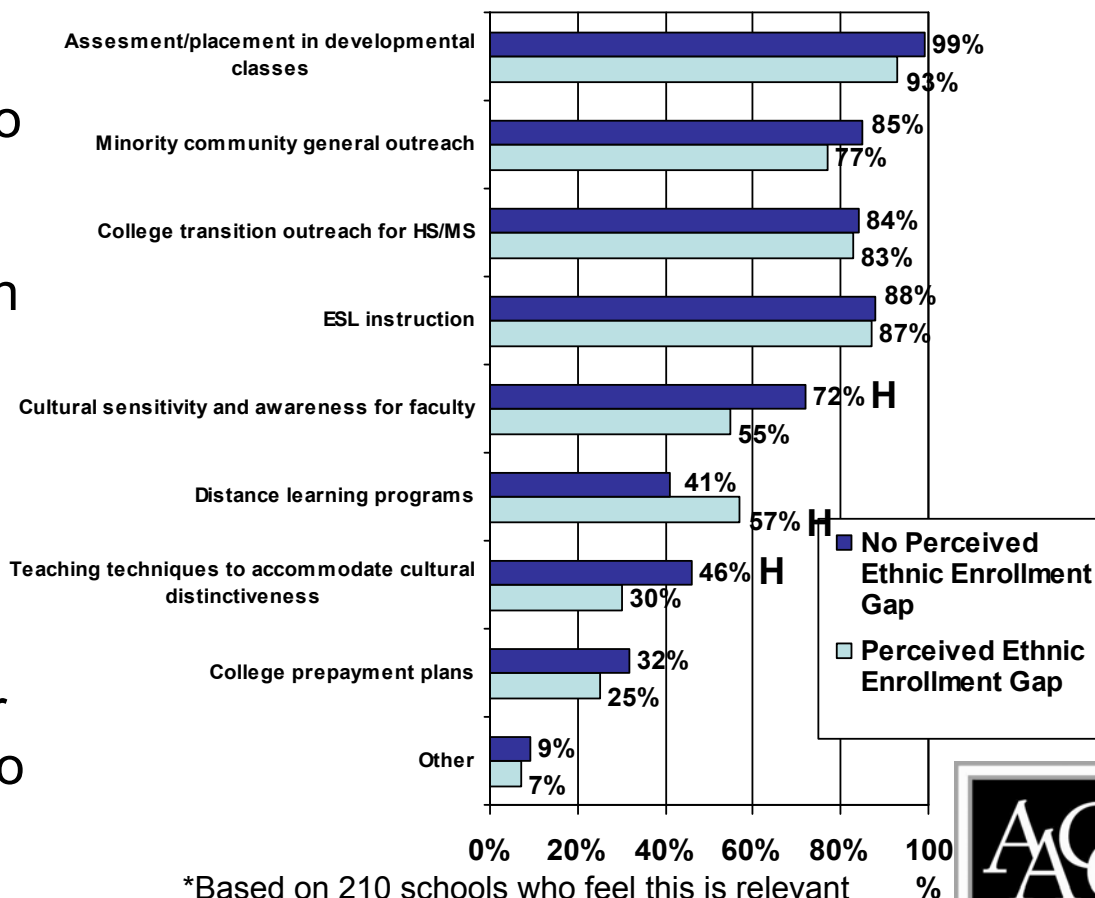
Expected Change in Enrollment Gap in Next 2-3 Yrs



Colleges are Responding to the Needs of a “Minority Majority” in Many Ways

- To address the demands of a rising minority enrollment, community colleges are engaging in outreach to minority communities and to minority high school/middle school students; they are also relying on placement in developmental classes and ESL instruction.
- Community colleges that have attracted substantial minority students (i.e., they do not have an enrollment gap) are more likely to offer cultural sensitivity training to faculty and stress diversity in curriculum.

Programs to Meet Demands of Minority Enrollment*



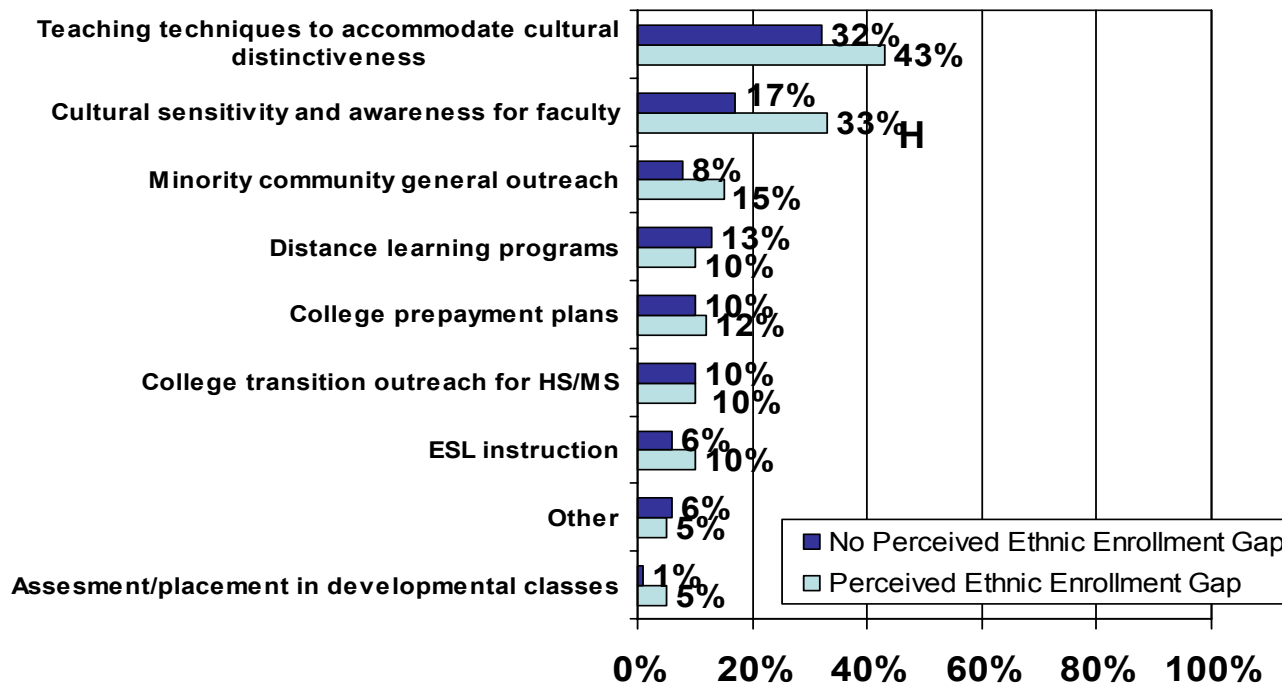
*Based on 210 schools who feel this is relevant in their area; H or L indicates a 95% significance difference within a category



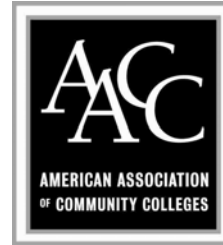
Schools with Minority Enrollment Gaps plan to Emulate their Successful Peers

- Mirroring the community colleges who do not have enrollment gaps, those having trouble attracting minorities plan to introduce teaching techniques to accommodate diversity and cultural sensitivity training for faculty.

Programs Being Planned to Meet the Needs of Minority Majority



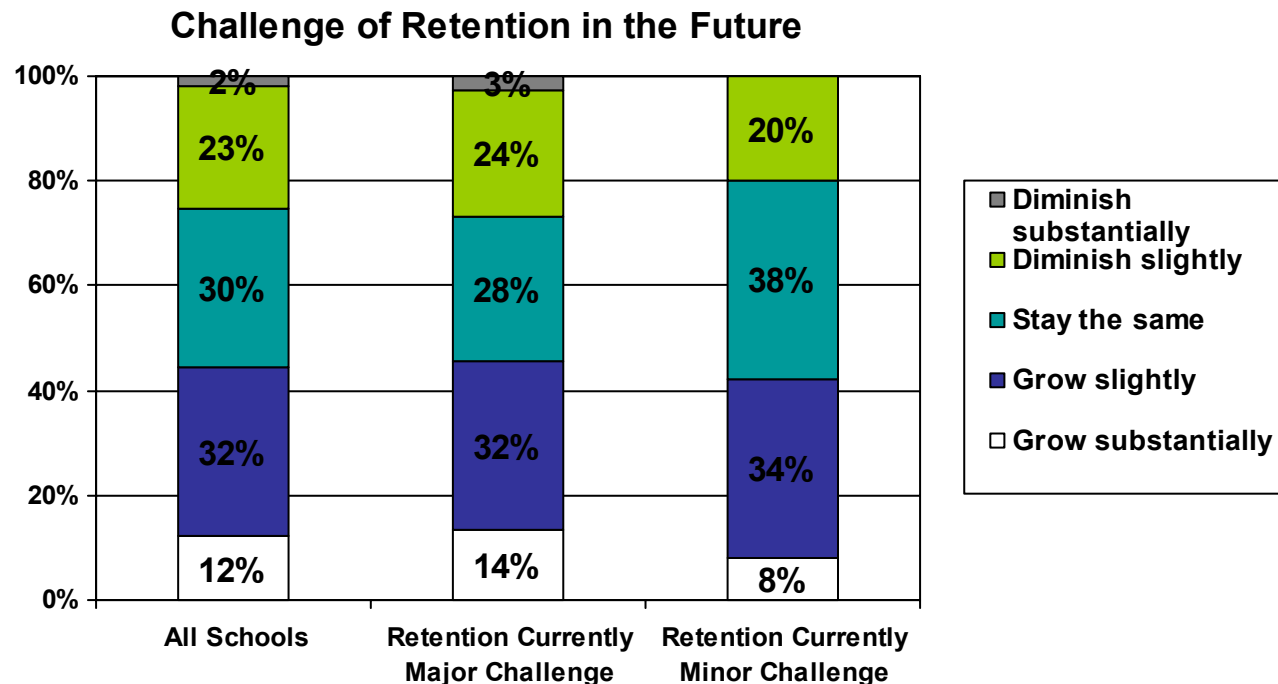
*H or L indicates a 95% significance difference within a category



3. Retaining Students at Community Colleges

Student Retention is a Widespread Concern for Community Colleges

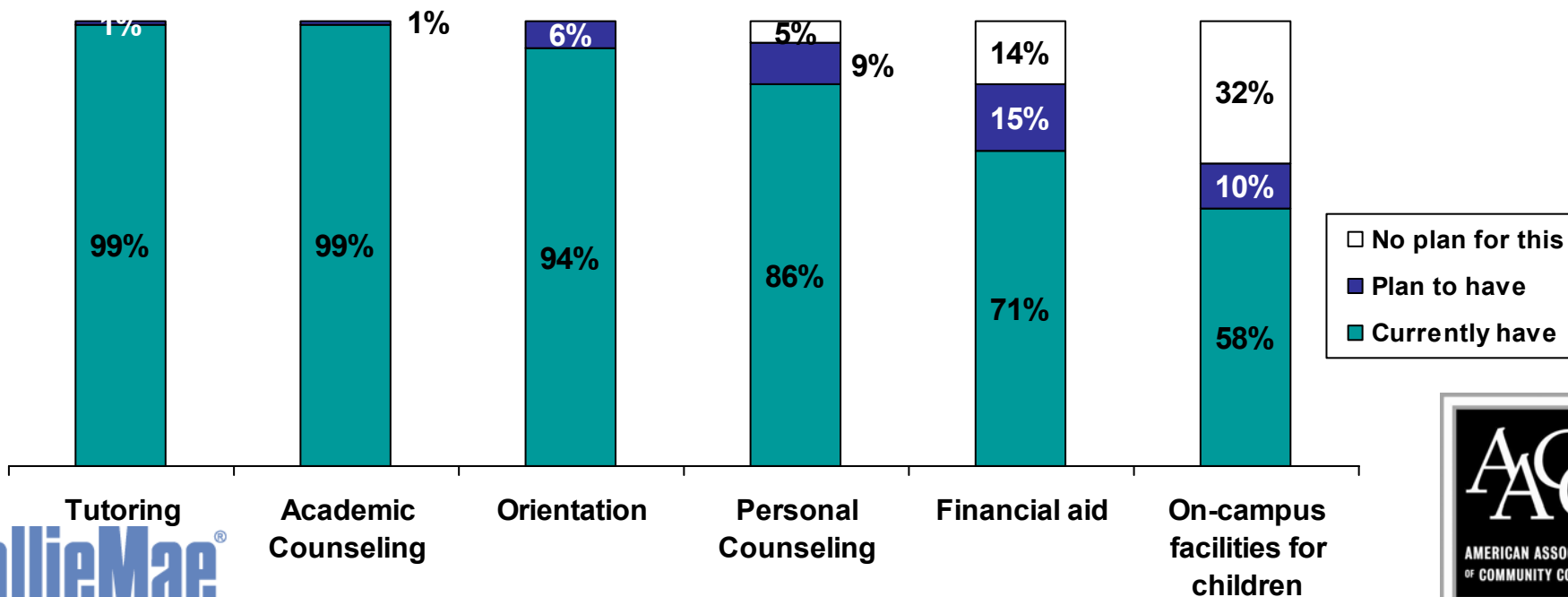
- 80% of the colleges believe that retention of students to graduation is a “major” challenge at their college, while almost all others consider it a “minor” challenge (less than 1% feel it is “not an issue”).
- More colleges think the problem will grow in the future than think the problem will diminish (45% expect it to grow slightly or substantially, while 25% expect it to diminish slightly or substantially).

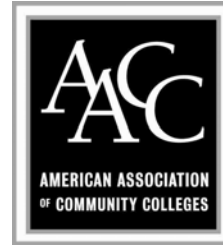


Retention Strategies Today are Deemed as “Somewhat” Effective

- The most common strategies for retaining students include tutoring, academic and personal counseling, and entering-student orientation.
- The strategy that will grow the most is financial aid (15% *plan* to do this).
- The programs are working but more needs to be done: only 6% of community colleges feel their current retention strategies are “very effective,” while 71% feel they are “somewhat effective.”

Retention Programs/Strategies



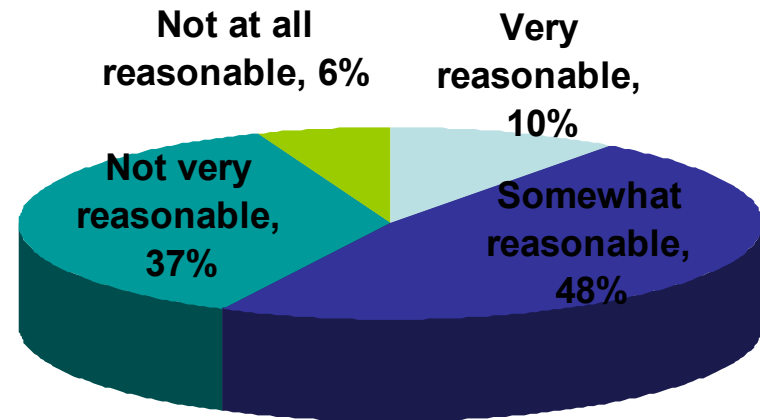


4. Accountability and Funding

Acceptance of Performance-based Funding is Tentative

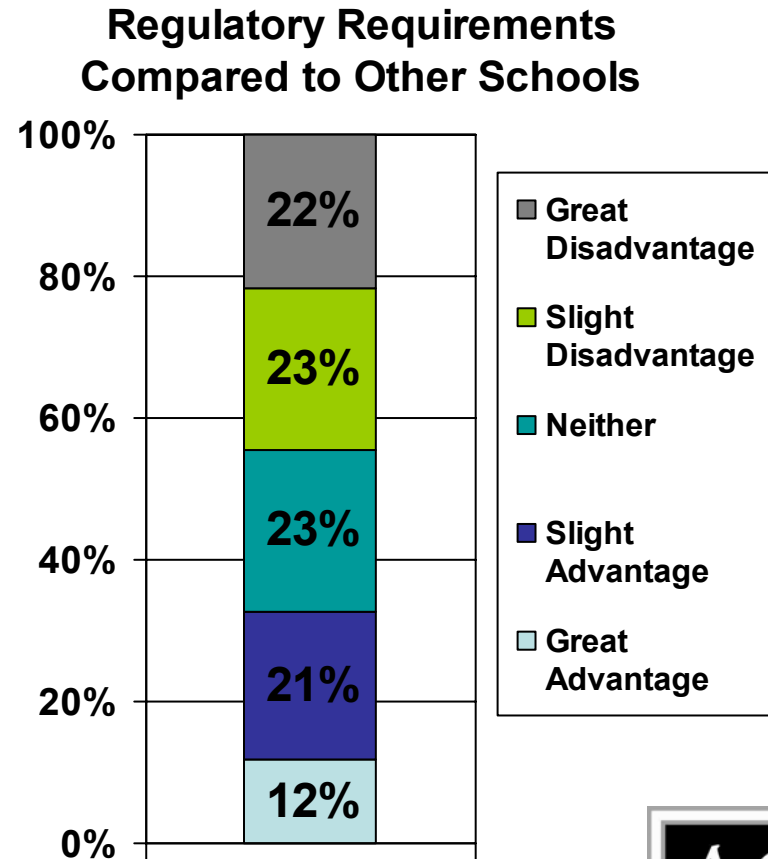
- “Performance-based funding” ties state support to goals such as transferring to senior degree colleges or obtaining employment – over half believe that this approach is “reasonable” to some degree.
- However, a substantial faction (43%) consider this approach not to be reasonable.

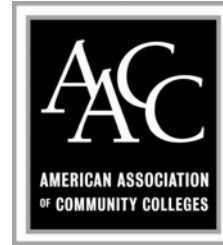
In principle, how reasonable is the idea of performance-based funding?



There is Some Concern about a Regulatory Funding Disadvantage

- Almost half (45%) of these leaders perceive community college students to be at a disadvantage to other post-secondary institutions in terms of regulatory requirements for state or local funding (see figure).
- When asked how their local community views community college funding, 71% feel the community believes it is primarily the state's responsibility, 17% the local community's, and 12% the student's.



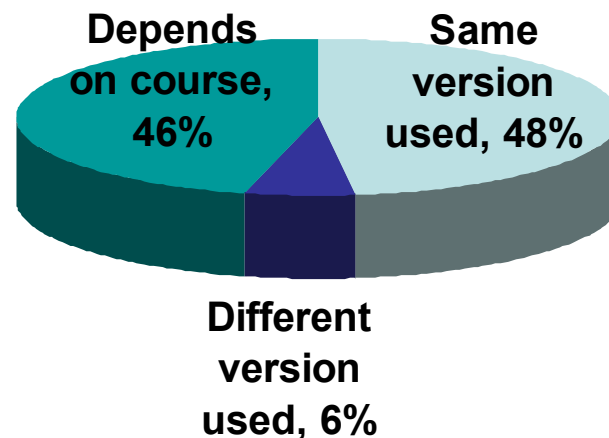


5. e-Learning at Community Colleges

98% of Community Colleges Offer Online Courses Today

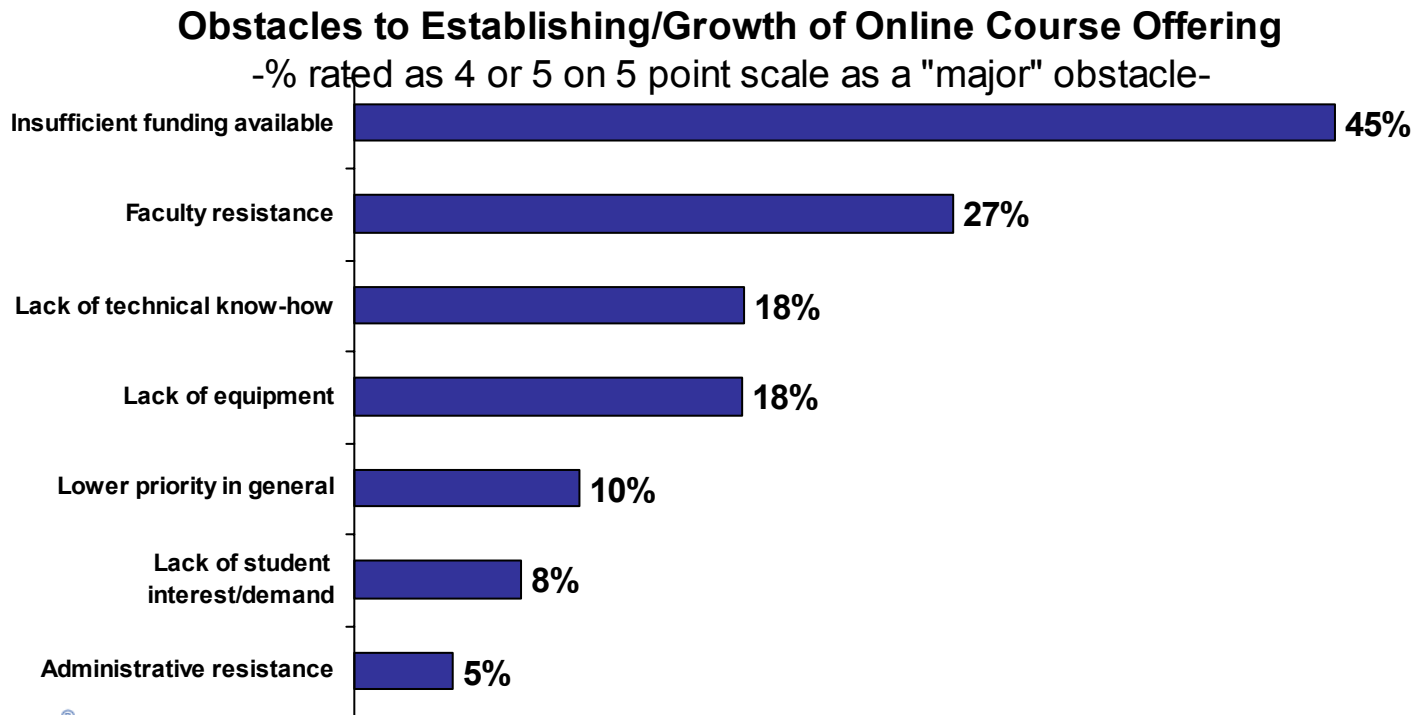
- Almost half (48%) offer the same versions of courses online as their traditional in-class courses (see figure).
- Of the schools that currently offer online courses, nearly all (94%) plan to expand their online course offerings in the future.
- When asked which types of schools are the “leaders” in online course offerings, a third (33%) feel that community colleges are in the lead, while 39% believe that proprietary colleges are in the lead.

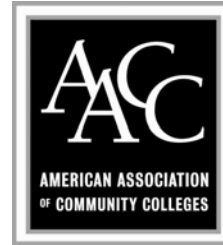
Course curriculum: Online vs. In-class (Traditional)



The Biggest Obstacle to Expanding e-Learning is a Lack of Funding

- Insufficient funds is the most often cited obstacle to establishing or continuing growth in online course offerings, cited by 45% of colleges
- Over a fourth (27%) cite faculty resistance.





Implications

What these Results Suggest for
Strategy and Policy

A Vital Resource

- Community Colleges play a major role in addressing the greatest challenges in the higher education sector today:
 - They are largely successful in providing a high quality and affordable education in the face of rising tuitions and lower per-student funding
 - They are meeting the needs of a population that is becoming more ethnically diverse by stressing outreach, cultural sensitivity and special programs
 - They are in the vanguard of the movement to e-learning.
- Community colleges believe they are innovative and successful in an era when higher education is being challenged.

Unique Challenges

- Community colleges face special challenges...
 - There is a major concern among leaders about diminishing funding at the state and local level
 - This loss of funding could ultimately affect students if rising costs are passed on in the form of higher tuition
 - Funding may also affect the ability to expand e-learning, which may relegate this revolution to proprietary schools who may not be as committed to affordability and diversity
- At a societal level, it may make sense to invest more rather than less in these institutions since they can provide a high return-on-investment.
- If costs rise, there will need to be more sources for aid and financing of education at these institutions.

The Question of Accountability

- Community college leaders are not enthusiastic about performance-based funding as currently defined, with only a small portion considering it “very reasonable.”
- Caution should be exercised in introducing such programs, and in considering the concerns of community leaders; some possible issues that may be inferred from this study include:
 - They feel that “nothing is broken” since community colleges in general offer a quality education
 - Rigorous definitions may not recognize the role these colleges play in the community, such as personal enrichment and ad hoc training
 - There is a potential for punishing institutions for engaging in outreach to communities that need their resources but may pull down the numbers
 - They want to be treated equally to other state institutions such as those granting 4 year degrees (who usually can and will reject students who are likely to fail)

The Challenge of Retention

- Student retention is one of the bigger challenges that community colleges face. They are engaging in a variety of programs to address this, such as tutoring, counseling and orientation, and with planned growth also in the area of financial aid. These programs are only “somewhat” successful, suggesting a need for learning and experimentation.
- There needs to be more research and benchmarking with this unique institution and student population to identify the causes of attrition and to develop new interventions to increase retention.

The Future of e-Learning

- Nearly all community colleges offer online courses, and many are expanding their course offerings. Community colleges should continue to play a key role in this exciting area, paving the way for how our society leverages technology to build skills in a competitive global market.
- There are some concerns that need to be addressed by society:
 - eLearning seems to be hindered by funding, but investing in this area may yield a high return
 - There is a perception that proprietary schools are leading the way more than community colleges, which raises the question about whether more support is needed to ensure that there is a strong public/not-for-profit e-learning sector; for example, public institutions are committed to training for careers that are not high paying but beneficial, making them less attractive to for-profits (e.g., law enforcement, fire and rescue, teaching, social work, etc.).