

Johnson County Community College
Fall 2016
Environmental Scan
Competition/Education

Trend #1: Value and Cost of Higher Education

Students, families and state and federal entities are questioning the return on investment of a college education, establishing expectations for institutional transparency in graduate completion, transfer, job attainment, wage potential and the associated costs in getting an education.

Trend #2: Accountability

An ever-increasing focus on accountability is being placed on all higher education institutions, including community colleges. Expectations include student outcomes success and relative value on educational investment, as well as retention, graduation, transfer rates, job placement, credential attainment, and wage potential.

Trend #3: Completion Agenda

Community colleges continue to struggle with low rates of degree completion and transfer.

Trend #4: Institutional Funding

The trend is to have funding tied to performance; funding is not keeping pace with increasing costs due to inflation. There is also declining state support which shifts the burden to students and taxpayers and/or requires tough decisions about cutting services or restricting offerings.

Trend #5: Workforce Needs

There is a heightened focus on ensuring that programs and certificates are closely linked to the labor market.

Trend #6: Competition/For-Profits

Although in the recent past, more for-profit institutions of higher education were moving into the area, recent policy changes requiring higher levels of accountability have caused many for-profit institutions to close.

Trend #7: Technology

The notion of anytime, anywhere access will continue to give rise to the need for more hybrid (online and traditional) course development in which both the institution and students benefit. Economic realities will continue to drive the need for specialization and reaching learners outside of the local geographic service area. Social media and mobile technologies greatly influence how Americans (and others) connect, communicate, develop and seek information and resources in a global society.

Trend #8: Financial Aid/Access to Higher Ed

A decrease in federal funding of Pell grants combined with an increase in college pricing is affecting student's ability to attend community college.

Trend #9: Special Populations: Nontraditional-Age, Hispanic Community, Veterans

A variety of populations provide prospective students for community colleges in general and JCCC in particular: older students, black students, the Hispanic community and veterans. The county will see growth in 60+ as well as.

Trend #10: Competency Based Education

Prior-learning assessments and competency-based education are two strategies receiving increased attention as mechanisms that raise the college attainment rate and are time- and cost-effective.

Trend #11: Underprepared Students

Evidence as to how prepared high school students are for college is mixed. There is evidence of an increasing gap between high school and college expectations for learning and curriculum

Trend #12: Enrollment of High School Graduates

The number of graduates from Johnson County high schools is projected to increase steadily through 2022.

Trend #1	Students, families and state and federal entities are questioning the return on investment of a college education.
Direction of Change for the next 3-5 years	Increasing
Probability of change for the next 3-5 years	Likely and somewhat impactful to JCCC
Opportunity or Threat	Both a threat and an opportunity - As more question the value of education, more research is being conduct; this research overwhelmingly highlights the benefits of a college degree.
Support Rationale	<p>“...America’s community colleges are the brokers of opportunity for a stronger middle class and more prosperous nation;... there are strong positive earnings gains from community college attendance and completion, as well as progression to a 4 year college...latest national estimate of the return on investment to state and local governments from investing in community colleges in 2007 was 16.1%.” (AACC, January 2013)</p> <p>57% of Americans...”say the higher education system in the United States fails to provide students with a good value for the money; 75% “says college is too expensive; ...however, 86%...”say that college has been a good investment for them personally.” (Pew Research, May 2011)</p> <p>“The underlying value proposition of higher education persists, lending inherent credit strength and support for ongoing demand for the sector’s services...Demand for higher education remains strong, but pricing power nearly exhausted” (Moody’s Investors Service, January 16, 2013)</p> <p>“...a “value gap” has opened up in the polling because far fewer people believe going to college at any price will be worth the financial investment”; “Families are seeking evidence of successful results to justify their college investment.” (Lawlor Group, 2013)</p> <p>Though there is still growing concerns regarding the value of a college education, research overwhelming highlights the importance of obtaining a college degree. ‘By 2020, an estimated two-thirds of job openings will require postsecondary education or training’ according to the U.S. Department of Education.</p> <p>Current research highlights the benefits of earning a college degree to include:</p> <ul style="list-style-type: none"> • Career/Economic Benefits <ul style="list-style-type: none"> ○ Higher income ○ Lower unemployment ○ Greater job satisfaction • Social/Emotional Benefits <ul style="list-style-type: none"> ○ More self-confident ○ More effective communicators ○ Suffer less from anxiety ○ Have more friends/lasting relationships ○ Have higher self-esteem ○ Are more likely to believe they have control over their own lives • Health/Welfare/Quality of Life Benefits <ul style="list-style-type: none"> ○ Greater access to healthcare ○ Less likely to smoke ○ More paid time off to spend with family/leisure ○ Higher quality of life for children of college graduates <ul style="list-style-type: none"> ▪ More access to healthcare ▪ More likely to participate in extra-curricular activities ▪ More likely to have a college fund
Sources	American Association of Community Colleges (January 2013). <i>Community College Contributions</i> .

Pew Research, May 15, 2011. *Is College Worth it?*

Moody's Investors Service, January 16, 2013. *US Higher Education Outlook Negative in 2013.*

Lawlor Group, 2013. *Ten Trends for 2013: How Marketplace Conditions Will Influence Private Higher Education Enrollment—And How Colleges Can Respond.*

Huffington Post (December 2015). *Is College Worth the Cost?*

[http://www.huffingtonpost.com/piyush-mangukiya/infographic-is-college-wor b 8692234.html](http://www.huffingtonpost.com/piyush-mangukiya/infographic-is-college-worth-b-8692234.html)

U.S. Department of Education: *College Affordability and Completion: Ensuring a Pathway to Opportunity*

<http://www.ed.gov/college>

The Chronicle of Higher Education (September 2015). *Just Half of Graduates Strongly Agree Their College Education Was Worth the Cost*

<http://www.chronicle.com/article/just-half-of-graduates/233453>

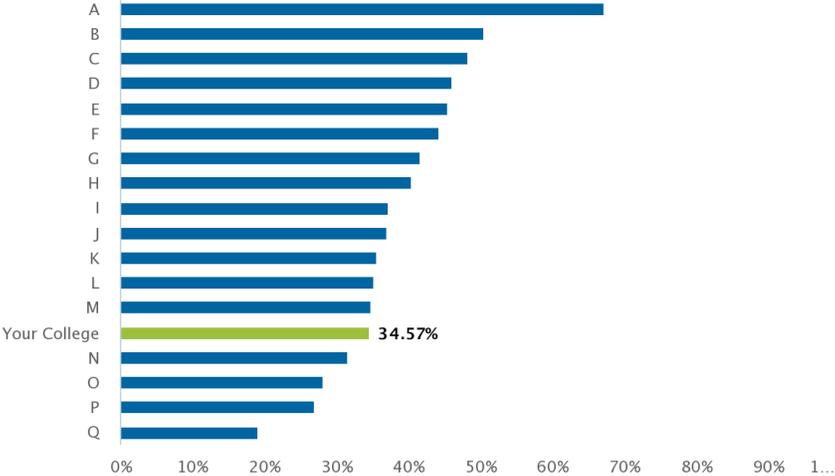
The Wall Street Journal (September 2015). *Recent Grads Doubt College's Worth*

<http://www.wsj.com/articles/recent-grads-doubt-colleges-worth-1443499440>

Trend #2	An ever-increasing focus on accountability is being placed on all higher education institutions, including community colleges. Expectations include student outcomes success and relative value on educational investment, as well as retention, graduation, transfer rates, job placement, credential attainment, and wage potential.
Direction of Change for the next 3-5 years	This trend is very likely to increase in the next 3-5 years.
Probability of change for the next 3-5 years	<p>This trend is very likely to continue and only increase in the coming years. In recent years performance-based accountability has become increasingly prevalent.</p> <p>JCCC must become even more transparent in our reporting and work together to improve upon current key performance indicators and other student outcomes. If we do not, others will define what success is for us, and we will be held to those definitions and possibly having those defined measures tied to funding (at local, state and national levels).</p>
Opportunity or Threat	Both a Threat and an Opportunity
Support Rationale	<p>JCCC Key Performance Indicators. http://www.jccc.edu/about/leadership-governance/administration/institutional-research/performance-indicators.html</p> <p>“Colleges are expected to produce more quality graduates to meet the needs of the 21st-century workforce.” (AACC, October,2010)</p> <p>The National Commission on Higher Education Attainment has indicated that retention and completion must be a critical campus priority in order to “stem the unacceptable loss of human potential represented by the number of students who never make it to graduation.” They suggest “three main areas for reform: changing the campus culture, improving cost-effectiveness and quality, and making better use of data.” (ACE, January, 2013)</p> <p>“Persistence and retention are cornerstones for increasing the rate at which students’ complete certificates and degrees.” “Graduation rates have...become a standard accountability measure of an institution’s quality.” (SCUP, 2012)</p> <p>Complete College America in the Regents System. (Fort Hays State University, September 17, 2013)</p> <p>Outcomes Metrics Pilot Project Design. (KBOR, August 29, 2013).</p> <p>The Kansas Senate Ways & Means Committee gathered information prior to the 2014 session commencing to assist with member discussions for the committee process of adopting the 2015 budget. “...use the following terms defined in the following manner...college preparation (remedial education, ABE, GED, etc.); college transfer; professional and technical training; workforce development; personal self-improvement.” (Sen. Steve Abrams, September, 2013).</p> <p>“...community colleges are a cornerstone of President Obama’s initiative to achieve the highest level of postsecondary educational attainment in the world by 2020. Moreover, legislators, foundations and other key stakeholders recognize that community colleges are a linchpin in advancing national goals for college access and completion.” (AACC, January, 2012).</p> <p>“Throughout budget discussions...there has been a consistent focus on the Foresight 2020 goal of ensuring sixty percent of Kansas adults obtain a certificate, credential, associate’s degree, or bachelor’s degree by 2020.” (KBOR, 2013)</p> <p>Accountability is being scrutinized. Colleges are being asked to demonstrate the value of their product with hard numbers, while performance funding is being</p>

	<p>discussed at state and national levels. If institutions are unable to report out or define the measurements of success, we will have lawmakers defining success and creating the report criteria for us in the futures. Over the past decade reporting at the state and national levels has increased. Additionally, institutions are being required to become more transparent and to report out on a variety of student outcomes. Two examples for the white house college score card: http://www.whitehouse.gov/issues/education/higher-education/college-score-card and http://collegecost.ed.gov/catc/</p> <p>It is acknowledged postsecondary education has become a prerequisite in many cases for finding and sustaining employment. Costs have continued to rise while support has declined. Educators and policy-makers will need to address the accountability process.</p> <p>Over recent years, the Obama administration has pursued executive actions and policy proposals to increase transparency and accountability within the postsecondary education system. These actions include:</p> <ul style="list-style-type: none"> • Gainful Employment regulations designed to stop the flow of federal dollars to low-performing career college programs • Strengthening academic progress requirements in federal student aid programs so that students are encouraged to complete their studies in a timely manner • Creating the College Scorecard allowing students and families to have greater access to college level data so they can make informed decisions by comparing college costs and success outcomes • Publishing each accreditor’s standards for evaluating student outcomes • Increasing transparency in the accreditation process in part by developing a website (http://www.ed.gov/accreditation) for easier access to information.
<p>Sources</p>	<p>Abrams, Steve. (2013). Letter to Community College Presidents.</p> <p>American Council on Education (2013). <i>An Open Letter to College and University Leaders: College Completion Must Be Our Priority.</i></p> <p>American Association of Community Colleges (January 2012). <i>The Voluntary Framework of Accountability: Developing Measures of Community College Effectiveness and Outcomes.</i></p> <p>American Association of Community Colleges (October, 2010). <i>Community Colleges Issues Brief prepared for the 2010 White House Summit on Community Colleges.</i></p> <p>Society for College and University Planning (2012). <i>SCUP Trends in Higher Education.</i></p> <p>Fort Hays State University (September 17, 2013). <i>Proposal: Complete College Kansas.</i></p> <p>Outcomes Metrics Pilot Project Design. (KBOR, August 29, 2013).</p> <p>Kansas Board of Regents (September 19, 2013). <i>Board Offers Top Priorities and Future Considerations for Continued Investment in Higher Education.</i></p> <p>Johnson County Community College. http://www.jccc.edu/administration/institutional-research/key-performance-indicators/ Accessed 10/31/2013.</p> <p>U.S. Department of Education: <i>College Affordability and Completion: Ensuring a Pathway to Opportunity</i> http://www.ed.gov/college</p>

	<p>U.S. Department of Education (November 2015). <i>Department of Education Advances Transparency Agenda for Accreditation</i> https://www.ed.gov/news/press-releases/department-education-advances-transparency-agenda-accreditation</p>
--	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Trend #3	Community colleges continue to struggle with low rates of degree completion and transfer.																																						
Direction of Change for the next 3-5 years	<p>JCCC has seen a decrease in our rank among peer institutions. Based on 2016 National Community College Benchmarking Project data, JCCC ranks 14th out of the 18 participating peer institutions (see the link below for the list of the 26 JCCC official peer institutions). This data reflects the JCCC fall 2012 cohort who graduated or transferred to a 4 year school within 3 years.</p> <p style="text-align: center;">Completed OR Transferred in Three Years: FT Students</p>  <table border="1" style="margin-left: auto; margin-right: auto;"> <caption>Completed OR Transferred in Three Years: FT Students</caption> <thead> <tr> <th>Institution</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>A</td><td>~68%</td></tr> <tr><td>B</td><td>~52%</td></tr> <tr><td>C</td><td>~48%</td></tr> <tr><td>D</td><td>~45%</td></tr> <tr><td>E</td><td>~44%</td></tr> <tr><td>F</td><td>~43%</td></tr> <tr><td>G</td><td>~41%</td></tr> <tr><td>H</td><td>~40%</td></tr> <tr><td>I</td><td>~38%</td></tr> <tr><td>J</td><td>~37%</td></tr> <tr><td>K</td><td>~36%</td></tr> <tr><td>L</td><td>~35%</td></tr> <tr><td>M</td><td>~34%</td></tr> <tr><td>Your College</td><td>34.57%</td></tr> <tr><td>N</td><td>~32%</td></tr> <tr><td>O</td><td>~30%</td></tr> <tr><td>P</td><td>~28%</td></tr> <tr><td>Q</td><td>~22%</td></tr> </tbody> </table> <p>Official JCCC Peer Institutions: http://www.jccc.edu/about/leadership-governance/administration/institutional-research/peer-institutions.html</p>	Institution	Percentage	A	~68%	B	~52%	C	~48%	D	~45%	E	~44%	F	~43%	G	~41%	H	~40%	I	~38%	J	~37%	K	~36%	L	~35%	M	~34%	Your College	34.57%	N	~32%	O	~30%	P	~28%	Q	~22%
Institution	Percentage																																						
A	~68%																																						
B	~52%																																						
C	~48%																																						
D	~45%																																						
E	~44%																																						
F	~43%																																						
G	~41%																																						
H	~40%																																						
I	~38%																																						
J	~37%																																						
K	~36%																																						
L	~35%																																						
M	~34%																																						
Your College	34.57%																																						
N	~32%																																						
O	~30%																																						
P	~28%																																						
Q	~22%																																						
Probability of change for the next 3-5 years	Efforts are underway to reverse this trend. This is evident through the college’s focus on completion rates as part of JCCC’s Key Performance Indicators and strategic planning.																																						
Opportunity or Threat	Threat																																						
Support Rationale	<p>The Completion Agenda: Call to Action American Association of Community Colleges – April 2011 http://www.aacc.nche.edu/Publications/Reports/Documents/CompletionAgenda_report.pdf</p> <p>In April 2010, the American Association of Community Colleges (AACC) joined with five other national organizations to express a shared commitment to student completion. These partner organizations (the Association for Community College Trustees, the Center for Community College Student Engagement, the League for Innovation in the Community College, the National Institute for Staff and Organizational Development, and the Phi Theta Kappa Honor Society) participated in an unprecedented joint-signing ceremony that committed our organizations to assisting our members in producing 50% more students with high-quality degrees and certificates by 2020.</p> <p>Abstract Community colleges are grappling with low rates of degree completion and transfer. The City University of New York’s (CUNY) Accelerated Study in Associate Programs (ASAP) aims to improve graduation rates by providing a range of comprehensive support services to community college students in select majors. Using student-unit record data, we employed propensity score matching to examine short-term and 3-year outcomes from ASAP’s first cohort, as well as logistic regression to identify program factors related to graduation. We found that ASAP participation was significantly positively related to retention, credit accrual, transfer, and degree attainment. Regression analyses indicated that a key influence on graduation is participation in advisement sessions. This study provides evidence that encouraging academic momentum via structured and comprehensive</p>																																						

	<p>support can significantly improve community college graduation rates. It also provides evidence that ongoing and intrusive advisement can encourage positive academic outcomes among community college students.</p> <p>Background <i>Statement of the Problem</i> Though a primary point of access to higher education, community colleges struggle to ensure that all of their students earn a credential. Of the first-time college students who entered a community college during the 2003-2004 school year, for example, 45% had left postsecondary education without earning a degree by 2006 (Provasnik & Planty, 2008). Only 6% had earned some sort of credential during the same 3-year period. Looking only at those students enrolled full-time and who might be better expected to complete a degree quickly improves the statistics only slightly: 21% of first-time, fulltime students who enrolled in a public 2-year college in the fall of 2005 had earned a certificate or associate’s degree 3 years later (Aud et al., 2010). Looking over a longer period of time does not change the overall low rates of completion for beginning community college students. Analyses of data from the National Education Longitudinal Study of 1988 (NELS:88) indicate that 8 years after high school graduation, fewer than 40% of community college enrollees earned a credential (Bailey & Morest, 2006). Another 11% transferred to a 4-year institution, though they had not earned a degree. These rates are even lower for Hispanic and black students.</p>
<p>Sources</p>	<p>Community College Review – October 30, 2013 http://crw.sagepub.com/content/41/4/271</p> <p>JCCC – Focusing on Student Success Patrick Rossol-Allison, Summer 2013</p> <p>CollegeFish.org and the Community College Completion Challenge (PTK) http://www.cccompletionchallenge.org/</p> <p>Make It Personal: College Completion (AACC) http://www.aacc.nche.edu/Resources/aaccprograms/horizons/Pages/mipcc.aspx</p> <p>2016 National Community College Benchmarking Project (NCCBP) data.</p>

Trend #4	The trend is to have funding tied to performance; funding is not keeping pace with increasing costs due to inflation. There is also declining state support which shifts the burden to students and taxpayers and/or requires tough decisions about cutting services or restricting offerings.
Direction of Change for the next 3-5 years	Markedly Increasing
Probability of change for the next 3-5 years	Highly likely and highly impactful for JCCC
Opportunity or Threat	Threat
Support Rationale	<p>“Community Colleges are facing a great funding challenge in that state funding is not keeping pace with increasing costs due to inflation, an expected increase in high school graduation rates, and consequent college enrollment increases. Because of these factors, community colleges must make tough decisions about cutting services or increasing tuition.” (AACC, 2013).</p> <p>“...efforts under way in a dozen states, still in their early stages, seek to answer mounting concerns about academic rigor in college. Two states are already using student surveys and standardized tests to document learning—and attaching financial rewards to the results.” “...formulas by which many states support their colleges have grown increasingly sophisticated, with money being awarded on the basis of more and more data points.” (The Chronicle of Higher Education, October 28, 2013.)</p> <p>“While asking more of institutions, federal and state governments are both reducing funding and increasing regulation.”</p> <p>“Throughout budget discussions...there has been a consistent focus on the Foresight 2020 goal of ensuring sixty percent of Kansas adults obtain a certificate, credential, associate’s degree, or bachelor’s degree by 2020.” (KBOR, 2013)</p> <p>Many states are moving away from enrollment-based funding and are transitioning to performance based funding. Thirty-two states have implemented performance-based funding to some degree. The graphic below illustrates the status of states making this transition. (National Conference of State Legislatures, 2015)</p> <div data-bbox="532 1283 1130 1833" data-label="Figure"> </div> <p>Kansas Statute 74-3202d established performance-based funding for technical colleges, community colleges, state universities and Washburn University. Each</p>

	<p>institution's receipt of new state funds is contingent upon meeting goals outlined in its Performance Agreement. Institutions submit a Performance Agreement for Board approval once every three years and performance is evaluated annually. (kansasregents.org)</p>
<p>Sources</p>	<p>American Association of Community Colleges (2013). http://www.aacc.nche.edu/AboutCC/Trends/Pages/characteristicsofcommunitycolleges.aspx Accessed 10/15/2013.</p> <p>The Chronicle of Higher Education (October 28, 2013). <i>States Demand That Colleges Show How Well Their Students Learn.</i></p> <p>Society for College and University Planning (2012). <i>SCUP Trends in Higher Education.</i></p> <p>Kansas Board of Regents (September 19, 2013). <i>Board Offers Top Priorities and Future Considerations for Continued Investment in Higher Education.</i></p> <p>National Conference of State Legislatures (2015): http://www.ncsl.org/research/education/performance-funding.aspx</p> <p>Kansas Board of Regents: https://www.kansasregents.org/academic_affairs/performance_agreements</p>

Trend #5	There is a heightened focus on ensuring that programs and certificates are closely linked to the labor market.
Direction of Change for the next 3-5 years	This trend is very likely to increase in the next 3-5 years.
Probability of change for the next 3-5 years	This trend is very likely to continue and only increase in the coming years. Over the next decade or so, as better-skilled/educated individuals leave the workforce they will be replaced by those who, on average, have lower levels of education and skill. Tying programs to jobs in the community is of great importance, and ensuring graduates have the skills to meet the needs of our current employer and market demands is necessary.
Opportunity or Threat	Opportunity
Support Rationale	<p>JCCC must work to grow and sustain its partnerships with local business and industry to train our future workforce. In addition to business and industry we must continue to grow partnerships with area post-secondary institutions related to articulation agreements, offerings, and streamlining the transfer process for those students who continue towards a baccalaureate degree or further.</p> <p>JCCC has opportunity by finding new ways of closing the gap between types of graduates and types of employees our employers say they need. The use of technology in this area can help JCCC add and update programs so graduates can obtain jobs. At the same time opportunity exists in determining programs that leave students in debt with skills employers do not need. The US Department of Education has also taken up this issue with recent regulations concerning student debt and federal funding and employability. (US Department of Education, 2014)</p> <p>Furthermore, Senate Bill 155 was created to stimulate growth in career and technical education in order to meet the growing needs of highly-technical and highly-skilled workers. (Kansas State Department of Education)</p> <p>Also, to meet the Kansas Board of Regents strategic planning agenda detailed in Foresight 2020, there will likely be a greater demand for career and workforce training delivered through a non-credit format.</p>
Sources	<p>http://theadvocate.com/news/6892318-123/slcc-needs-financial-help-to</p> <p>http://hechingerreport.org/content/colleges-take-new-approach-to-anticipating-and-meeting-workforce-needs_11005/</p> <p>http://www.jff.org/</p> <p>Occupation data</p> <p>EMSI occupation employment data are based on final EMSI industry data and final EMSI staffing patterns. Wage estimates are based on Occupational Employment Statistics (QCEW and Non-QCEW Employees classes of worker) and the American Community Survey (Self-Employed and Extended Proprietors). Occupational wage estimates also affected by county-level EMSI earnings by industry.</p> <p>State data sources</p> <p>This report uses state data from the following agencies: Kansas Department of Labor, Labor Market Information Services, Kansas Wage Survey; Missouri Department of Economic Development</p> <p>Kansas State Department of Education: http://www.ksde.org/Agency/Division-of-Learning-Services/Career-Standards-and-Assessment-Services/CSAS-Home/Career-Technical-Education-CTE/Initiatives/Senate-Bill-155</p>

	<p>US Department of Education, 2014 http://www.ed.gov/news/press-releases/obama-administration-announces-final-rules-protect-students-poor-performing-career-college-programs</p> <p>Kansas Board of Regents: Foresight 2020: http://www.kansasregents.org/foresight_2020</p>
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Trend #6	Although in the recent past, more for-profit institutions of higher education were moving into the area, recent policy changes requiring higher levels of accountability have caused many for-profit institutions to close.
Direction of Change for the next 3-5 years	It is likely that more non-profit institutions will close in the coming years, as these institutions will more than likely continue to lose funding and accreditation.
Probability of change for the next 3-5 years	High
Opportunity or Threat	Opportunity
Support Rationale	<p>The Accrediting Council for Independent Colleges and Schools (ACICS) was recently stripped of its accrediting authority. This was the largest accrediting agency of for-profit colleges and universities...including ITT Technical Institute and Wright Career College. Both state and federal officials have said students from ACICS accredited schools have particularly low graduation rates and often can't repay debt acquired while attending school. (Kansas City Star, 2016)</p> <p>It has been reported that as many as 96% of all students at for-profit schools took out federal loans to pay for school. (St. Louis Post Dispatch, 2014)</p> <p>By increasing accreditation requires and limiting financial resources for low-performing schools, pro-profit schools will likely continue to see declines in enrollments and face financial hardships. Many for-profit schools have already had to shutter their doors:</p> <p><u>Wright Career College</u> recently closed and is currently in litigation as the result of a federal court suit that accuses the school of fraud and misrepresentation. (Kansas City Star, 2016)</p> <p><u>ITT Tech</u> closed campuses in Overland Park and Kansas City as well as all other ITT schools. (Kansas City Star, 2016)</p> <p><u>Corinthian College</u>, which is also the parent company for <u>Everest College</u>, announced its intentions to close or sell all of its campuses, including Everest sites in Kansas City and Springfield, MO. (St. Louis Post Dispatch, 2014)</p> <p><u>Heritage College</u> is also among the growing list of for-profit schools closing its doors, including its Kansas City campus. (Fox4 News, 2016)</p> <p>Additionally, DeVry University recently agreed to a \$100 Million Settlement with the FTC as a result of complaints that it misled consumers by claiming deceptively high employment and earnings rates by graduates. (FTC, 2016)</p>
Sources	Heritage College announces closure of all campuses, including Kansas City and Wichita, 2016. Fox4 News: http://fox4kc.com/2016/11/01/heritage-college-announces-closure-of-kansas-city-and-wichita-campuses/

	<p>For-profit college accrediting agency is stripped of authority, 2016. Kansas City Star: http://www.kansascity.com/news/local/article103715817.html</p> <p>Everest College's fate renews debate over for-profit colleges, 2014. St. Louis Post Dispatch: http://www.stltoday.com/news/local/education/everest-college-s-fate-renews-debate-over-for-profit-colleges/article_a40a5081-83d5-50bd-8f38-0251b720e6c2.html</p> <p>DeVry University Agrees to \$100 Million Settlement with FTC, 2016. FTC: https://www.ftc.gov/news-events/press-releases/2016/12/devry-university-agrees-100-million-settlement-ftc</p>
--	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Trend #7	<p>Use of technologies such as distance learning, telecommuting, and videoconferencing will likely increase in the next 3-5 years.</p> <p>The notion of anytime, anywhere access will continue to give rise to the need for more hybrid (online & traditional) course development in which both the institution and students benefit. Economic realities will continue to drive the need for specialization and reaching learners outside of the local geographic service area.</p> <p>Social media and mobile technologies greatly influence how Americans (and others) connect, communicate, develop and seek information and resources in a global society.</p>
Direction of Change for the next 3-5 years	This trend is very likely to increase in the next 3-5 years.
Probability of change for the next 3-5 years	<p>This trend is very likely to continue and only increase in the coming years. Currently we have a larger number of institutions nationally competing for our students through distance education programs.</p> <p>Although current research indicates MOOCS may be fading as a trend, the future of MOOCS is still unknown. Nonetheless, JCCC must look at alternative ways to deliver education to a growing number of diverse students with varied technical skill sets.</p>
Opportunity or Threat	Opportunity and potential threat
Support Rationale	<p>The opportunity to provide access to education is growing with the variety of platforms available for teaching outside the classroom. Not only is distance education/real time education available via a PC, but now students can view lectures and/or research via IPADS, mobile devices, tablets, etc. Because students are coming to post-secondary institutions with a technical skill set, we must find a way to engage the student with the use of technology moving into the future. An example may be the flipped classroom.</p> <p>Enrollment in distance education continues to grow. According to a recent study, the number of students enrolled in at least one distance learning course in 2015 was up 4% compared to the previous year. (Babson Study, 2016)</p>
Sources	<p>http://www.educationdive.com/news/12-tech-trends-higher-education-cannot-afford-to-ignore/156188/</p> <p>http://www.thelawlogroup.com/trends-2013-0</p>

	<p>http://campustechnology.com/newsletters/ctittrends/archive.aspx</p> <p>http://www.evollution.com/distance_online_learning/technological-trends-set-tone-higher-educations-future/</p> <p>http://www.chronicle.com/article/MOOCs-Are-Dead-Long-Live/237569?cid=cc&utm_source=cc&utm_medium=en&elqTrackId=40f8a5df7e534bb9a26f34e73b022766&elq=6ca3db48ce0546eaa3da42752e34e7e6&elqaid=10483&elqat=1&elqCampaignId=3934</p> <p>http://www.emergingedtech.com/2013/08/introducing-the-future-trends-technology-and-education-newsletter-by-bryan-alexander/</p> <p>http://www.usnews.com/education/online-education/articles/2016-01-22/what-employers-think-of-badges-nanodegrees-from-online-programs</p> <p>Babson Study: Distance Education Enrollment Growth Continues (2016): https://onlinelearningconsortium.org/news_item/babson-study-distance-education-enrollment-growth-continues-2/</p>
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Trend #8	A decrease in federal funding of Pell grants combined with an increase in college pricing is impacting student’s ability to attend community college.
Direction of Change for the next 3-5 years	Funding sources for student tuition are coming more from unsubsidized student loans and institutional grants/scholarships
Probability of change for the next 3-5 years	Continued increase in financial responsibility on student Increase in student loan debt
Opportunity or Threat	Threat
Support Rationale	<p>Politicians, academics and students alike have all criticized the ballooning cost of college and its contribution to the existing mountain of outstanding student loan debt. But students also suffer from a lack of financial literacy that leaves them unable to navigate the complex maze of financial aid applications and loan options, further adding to their money troubles even after they leave school.</p> <p>National student loan debt now tops \$1.1 trillion, with the average student accruing more than \$26,000 in debt upon graduating. And more than half of this outstanding debt is not being repaid because borrowers are struggling financially. Many have said these statistics are the result of a higher education system that has become increasingly inaccessible and unaffordable. But it also stems from a deeper issue: students don't know what they're getting into when they take out loans, and they don't know what their options are when they have to pay them back.</p> <p>The dramatic economic disruptions of the Great Recession had a major impact on colleges and universities, their students, and the multifaceted financial aid system that has developed to help students and their families pay for higher education. The data reported in <i>Trends in Student Aid 2013</i> reveal that the sharp increases in federal grant aid and in student borrowing accompanying the financial crisis have not been repeated. Indeed, while the federal government continues to play a large and increased role in funding students, spending on both federal grants and federal loans decreased in 2012-13.</p> <p>Types of Student Aid</p>

In 2012-13, 49% of all student aid was in the form of grants — the highest percentage over the past decade. In 2008-09, 44% of student aid was grant aid. In 2012-13, 43% of all student aid was in the form of federal loans — the lowest percentage over the past decade. In 2008-09, federal loans constituted 49% of student aid.
 Source: CollegeBoard Trends in Student Aid – 2013

The cost of college continues to rise at a faster rate than inflation, and students are leaving college with record amounts of debt.

According to a press release from the U.S. Department of Education, ‘the maximum Pell Grant covers only about 30% of the cost of a four-year public college education – the lowest proportion in history and less than half of what it covered in 1980.’

Furthermore, the House Budget Committee has worked to cut funding for Pell Grants by proposing policies that remove mandatory funding for PELL and instead have all PELL funding tied to discretionary funds (Center on Budget and Policy Priorities, 2015).

However, the Obama administration has demonstrated a greater support for funding for higher education, particularly by making several key funding proposals in the fiscal year 2017 budget. This includes making PELL Grant funds available year-round to full-time students who have exhausted their awards (summer funds from PELL are currently only available to students who have not exhausted their awards) and awarding bonus funding for students on track to complete college on time. (It should be noted that these are proposals and are likely to change with the change in administration). (US Department of Education).

The table below illustrates the JCCC student population that received financial aid in 2014-2015. (National Center for Education Statistics)

All Undergraduate Students

TYPE OF AID	NUMBER RECEIVING AID	PERCENT RECEIVING AID	TOTAL AMOUNT OF AID RECEIVED	AVERAGE AMOUNT OF AID RECEIVED
Grant or scholarship aid ¹	5,548	29%	\$18,197,547	\$2,920
Pell grants	3,805	20%	\$13,008,279	\$3,419
Federal student loans	3,057	16%	\$12,802,844	\$4,188

¹ Grant or scholarship aid includes aid received, from the federal government, state or local government, the institution, and other sources known by the institution.

It should also be noted that financial aid is not available to non-credit students. There are also only a very limited number of grant opportunities for continuing education as many are not cost productive.

Sources

US News and World Report
<http://www.usnews.com/news/articles/2013/10/03/closing-the-financial-literacy-gap-to-combat-student-debt>

About New America
 The New America Foundation is a nonprofit, nonpartisan public policy institute that invests in new thinkers and new ideas to address the next generation of challenges facing the United States.
http://pnpi.newamerica.net/spotlight/the_price_of_college

College Board : Advocacy and Policy Center 2013
<http://trends.collegeboard.org/student-aid>
<http://trends.collegeboard.org/student-aid/highlights>

New America Foundation is an American non-profit, nonpartisan public policy institute and think tank focusing on a wide range of issues, including national security studies, technology, asset building, health, energy, education, and the economy. [Wikipedia](#)

The Wall Street Journal (May 2014). *Congratulations to Class of 2014, Most Indebted Ever*

U.S. Department of Education: *College Affordability and Completion: Ensuring a Pathway to Opportunity*
<http://www.ed.gov/college>

House Budget Committee Plan Cuts Pell Grants Deeply Reducing Access to Higher Education (Oct. 2015). Center on Budget and Policy Priorities:
<http://www.cbpp.org/research/house-budget-committee-plan-cuts-pell-grants-deeply-reducing-access-to-higher-education>

College Affordability and Completion: Ensuring a Pathway to Opportunity. US Department of Education: <http://www.ed.gov/college>

National Center for Education Statistics:
<http://nces.ed.gov/collegenavigator/?q=johnson+county+community+college&s=all&id=155210>

Trend #9	A variety of populations provide prospective students for community colleges in general and JCCC in particular: older students, black students, the Hispanic community and veterans.
Direction of Change for the next 3-5 years	The population of people age 65 years and older in Johnson County is expected to increase by 54% between 2010 and 2020 according to Emsi. Similar changes in ethnicity in the county are also expected by 2020 – a 36% increase in the black, non-Hispanic population, a 16% increase in non-white Hispanics and an 24% increase in white Hispanics. Meanwhile, nationally the number of veterans or dependents using GI education benefits has almost doubled, from 541,439 in 2008 to 945,052 in 2012; VA figures indicate there are 34,523 veterans living in Johnson County 2016 (down slightly from 36,030 2014).
Probability of change for the next 3-5 years	Moderate
Opportunity or Threat	Opportunity
Support Rationale	<p>Community colleges will need to implement new programs and rethink policies and procedures that impede access for special populations. Possibilities include:</p> <p>The Lumina Foundation is realizing that its “Big Goal” of ensuring that 60% of Americans have obtained a postsecondary credential by 2025 is attainable only if an older population returns to school. Studies suggest that one way institutions can reach an older audience is by awarding academic credit for prior learning obtained through the military, corporate training or other non-classroom settings. For fall 2013 at JCCC, 2,248 (11.4%) of the student body was ages 30-39, 1,085 (5.5%) were ages 40-49, and 1,172 (6.0%) were 50 and older.</p> <p>Research shows that nationally a greater share of Hispanic recent high school graduates enroll in college than white students. This close-knit community requires special attention and techniques (for example, family plays a more significant role in educational decision-making than with other populations). For fall 2013, 2,248 (6.5%) JCCC students were Hispanic.</p> <p>With enhancements to the GI Bill and the wars in Iraq and Afghanistan ending, a surge in veteran enrollment similar to that after World War II is possible. Veterans, however, have special needs, including specialized orientation programs, ways for veterans to connect with one another, and awareness training for faculty and staff. JCCC enrolls between 400 and 435 veterans as students each fall and spring semester.</p>
Sources	<p>Abramson, Larry. NPR, “Vets Flock to Colleges . . . But How Are They Doing?”, posted Dec. 5, 2012, http://www.npr.org/2012/12/05/166501611/vets-flock-to-colleges-but-how-are-they-doing</p> <p>Associated Press, “In War Wind-Down, Veterans’ New Mission is College,” posted Oct. 18, 2013, http://www.npr.org/templates/story/story.php?storyId=236708201</p> <p>Council for Adult & Experiential Learning, “Fueling the Race to Postsecondary Success,” March 2010, http://www.cael.org/pdf/PLA_Fueling-the-Race.pdf</p> <p>Higher Ed Insight brief, “From Contact to Completion: Supporting Returning Adult Students in Obtaining a College Credential,” http://adultcollegecompletion.org/sites/files/documents/higherEdInsightBrief.pdf</p> <p>JCCC Office of Institutional Research</p> <p>JCCC Office of Veterans Services/Veterans Affairs</p>

Ledeman, Doug. Inside Higher Ed, "The 'Prior Learning' Edge," posted March 1, 2010, <http://www.insidehighered.com/news/2010/03/01/prior>

Liu, Michelle Camacho. National Conference of State Legislatures, Investing in Higher Education for Latinos, "Trends in Latino College Access and Success," July 2011, <http://www.ncsl.org/documents/educ/trendsinlatinosuccess.pdf>

Lopez, Mark Hugo, and Fry, Richard. Pew Research Center, "Among recent high school grads, Hispanic college enrollment rate surpasses that of whites," posted Sept. 4, 2013, <http://www.pewresearch.org/fact-tank/2013/09/04/hispanic-college-enrollment-rate-surpasses-whites-for-the-first-time/>

Lytle, Ryan. U.S. News, "Hispanics Are Now the Largest Minority in College," posted Aug. 31, 2012, http://www.usnews.com/education/best-colleges/articles/2012/08/31/hispanics-are-now-the-largest-minority-in-college_print.html

Military.com by St. Louis Post Dispatch, "Veterans Returning to College Face Unique Challenges," <http://www.military.com/veteran-jobs/career-advice/military-transition/veterans-in-college-face-challenges.html>

Welter, Greg. Chico-Enterprise-Record, "Returning military veterans choosing college in record numbers," posted May 13, 2013, http://www.chicoer.com/ci_23230440/returning-military-veterans-choosing-college-record-numbers

Emsi

Trend #10	Prior learning assessments and competency based education are two strategies receiving increased attention as mechanisms that raise the college attainment rate and are time and cost effective.
Direction of Change for the next 3-5 years	Tentative Increasing
Probability of change for the next 3-5 years	Likely and possibly impactful for JCCC
Opportunity or Threat	Opportunity
Support Rationale	<p>“Community college students will be able to demonstrate competency to earn credits in self-paced classes” using the Western Governors University model with classes including classroom instruction as well as online learning; Sinclair Community college, Broward College and Austin Community College have received a share of a DOL grant to develop curricula for key technology fields that allow students to move at their own pace in courses that aren’t purely internet based. (Community College Spotlight, 2013)</p> <p>Prior learning assessments and competency based education are two strategies receiving increased attention as mechanisms that raise the college attainment rate and are time and cost effective; ...adult students who received prior learning assessment were 2.5 times more likely to persist in their education and complete their degrees than student who received no prior learning credit; Western Governors University...developed a new model that ensured graduates had the knowledge and skills necessary for the workforce that was both affordable and accessible. “Today, WGU has approximately 39,000 student with over 23,000 degrees awarded in key workforce areas...” Other long standing competency based programs are Alverno College; Southern New Hampshire University College for America. “Earlier this year,...Higher Learning Commission announced it was launching a pilot for schools in its region interested in pursuing competency based framework. “ Capella University, Northern Arizona University, University of Wisconsin Colleges, and the University of Wisconsin-Milwaukee are participating in the pilot. Other models to consider are at the Delaware County Community College and Westminster College, Utah. (New America Foundation, 2013)</p> <p>“Later this year Wisconsin’s extension system will start a competency based learning program, called the Flexible Option, in which students with professional experience and training in certain skills might be able to test out of whole courses on their way to getting a degree.” (The Chronicle of Higher Education, September 30, 2013)</p> <p>“A groundbreaking form of competency based education...College for America” launched by Southern New Hampshire University. It is one of there institutions now offering “direct assessment” academic tracks which are not based on the credit hour standard. (Inside Higher Ed, August 16, 2013)</p> <p>Competency based education continues to garner interest. According to the American Institute for Research, ‘more than 500 CBE programs are either in the planning or implementation phase at institutions of all types and all levels.’ Furthermore, CBE programs are designed to address several challenges within higher education including:</p> <ul style="list-style-type: none"> • Quality – ‘students must demonstrate competency through rigorous assessments’ • Price/Cost to Students– since these are often self-paced courses, students can complete programs sooner. Therefore, they acquire less debt and begin earning income sooner. • Access and Success – flexibility in scheduling allows more opportunities for non-traditional students to enroll and complete their degrees at times and a pace that is convenient for them. <p>An additional benefit of CBE programs could be the potential to serve more students at the same time as students self-pace and are out of the classroom more.</p>

Sources	<p>Community College Spotlight, 2013. <i>Colleges will design competency-based, self-paced courses.</i></p> <p>New America Foundation, 2013. <i>Prior Learning and Competency-Based Education.</i> http://pnpi.newamerica.net/prior_learning_and_competency_based_education Accessed 10/31/2013.</p> <p>The Chronicle of Higher Education, September 30, 2013. <i>Competency-Based Education Goes Mainstream in Wisconsin.</i></p> <p>Inside Higher Ed, August 16, 2013. <i>Experimental College's First Graduate.</i></p> <p>Parsons, Kelle; Mason, Jessica; and Soldner, Matthew. American Institutes for Research (October 2016). <i>On the Path to Success</i> www.air.org</p> <p>Soldner, Matthew and Parsons, Kelle. American Institutes for Research (May 2016). <i>Making the Case for Competency-Based Education</i> www.air.org</p>
----------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Trend #11	Evidence as to how prepared high school students are for college is mixed. There is evidence of an increasing gap between high school and college expectations for learning and curriculum
Direction of Change for the next 3-5 years	Likely to increase There may be increased competition for these students, particularly from the for-profit institutions.
Probability of change for the next 3-5 years	Highly likely and highly impactful for JCCC.
Opportunity or Threat	Opportunity
Support Rationale	<p>Enrollment patterns at area community colleges support this trend. The enrollment in developmental courses has continued to grow over the past several years. However, the impact in funding for these type of courses is yet to be realized to its full extent. Nationally this trend is also observed and is a topic of considerable concern for global positioning.</p> <p>According to the latest findings from the National Assessment of Educational Progress, only 37% of U.S. high school seniors are college ready. These results are based on 2015 assessment results from a nationally representative sample and are down slightly from 2013. Furthermore, there continue to be significant gaps across scores based on ethnicity with more white and Asian students scoring at or above proficient than black and Hispanic students.</p>
Sources	<p>American College Testing. <i>Crisis at the core: Preparing all students for college and work</i>, Retrieved from: http://www.act.org/path/policy/reports/crisis.html. American College Testing Service, Information for policy makers 2004.</p> <p>Collins, M. , <i>Undergraduate science, math and engineering</i>, Congressional Testimony, House Science Subcommittee on Research, March 15, 2006.</p> <p>Duranczyk, I., & Higbee, J. <i>Developmental Mathematics in 4-Year Institutions: Denying Access</i>. <i>Journal of Developmental Education</i>, 30(1), 22-31, 2006</p>

	<p>Lipka, Sarah, On a Mission to Help Students Pass Math, The Chronicle of Higher Education, February 14, 2010.</p> <p>Schuetz, P., & Barr, J., editors . Are Community Colleges Underprepared for Underprepared Students, New Directions for Community Colleges, Number 144, Winter 2008.</p> <p>Camera, Lauren. U.S. News and World Report (April 2016). <i>High School Seniors Aren't College-Ready</i></p>
--	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Trend #12	The number of graduates from Johnson County high schools is projected to increase through 2022.																																																							
Direction of Change for the next 3-5 years	After a slight decline in the number of Johnson County high school graduates in 2014 and 2015, the number will increase starting in 2016 and continue, with a slight drop in 2020 and significant increases in 2021 and 2022.																																																							
Probability of change for the next 3-5 years	Low																																																							
Opportunity or Threat	Opportunity																																																							
Support Rationale Briefly Describe, citing sources, why this is identified as a trend and what is driving it	<p>Of fall 2013 local graduates, 1,385 were projected to enroll at JCCC; 1,748 graduates are projected to enroll at JCCC in 2022, which is a 26% increase in head count. However, that projection of the number of students coming to JCCC equals 22% of the local graduating class. In fall 2014 and 2016, JCCC enrolled 20% of Johnson County high school graduates.</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th></th> <th>2013</th> <th>2014</th> <th>2015</th> <th>2016</th> <th>2017</th> <th>2018</th> <th>2019</th> <th>2020</th> <th>2021</th> <th>2022</th> </tr> </thead> <tbody> <tr> <td>Grade 12</td> <td>6,721</td> <td>6,667</td> <td>6,639</td> <td>6,991</td> <td>7,091</td> <td>7,510</td> <td>7,684</td> <td>7,467</td> <td>8,003</td> <td>8,482</td> </tr> <tr> <td>Spring graduates</td> <td>6,298</td> <td>6,247</td> <td>6,221</td> <td>6,551</td> <td>6,644</td> <td>7,037</td> <td>7,200</td> <td>6,997</td> <td>7,499</td> <td>7,948</td> </tr> <tr> <td>% grad change</td> <td>1.1%</td> <td>-0.8%</td> <td>-0.4%</td> <td>5.3%</td> <td>1.4%</td> <td>5.9%</td> <td>2.3%</td> <td>-2.8%</td> <td>7.2%</td> <td>6.0%</td> </tr> <tr> <td>Enroll at JCCC</td> <td>1,385</td> <td>1,374</td> <td>1,369</td> <td>1,441</td> <td>1,462</td> <td>1,548</td> <td>1,584</td> <td>1,539</td> <td>1,650</td> <td>1,748</td> </tr> </tbody> </table>		2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Grade 12	6,721	6,667	6,639	6,991	7,091	7,510	7,684	7,467	8,003	8,482	Spring graduates	6,298	6,247	6,221	6,551	6,644	7,037	7,200	6,997	7,499	7,948	% grad change	1.1%	-0.8%	-0.4%	5.3%	1.4%	5.9%	2.3%	-2.8%	7.2%	6.0%	Enroll at JCCC	1,385	1,374	1,369	1,441	1,462	1,548	1,584	1,539	1,650	1,748
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022																																														
Grade 12	6,721	6,667	6,639	6,991	7,091	7,510	7,684	7,467	8,003	8,482																																														
Spring graduates	6,298	6,247	6,221	6,551	6,644	7,037	7,200	6,997	7,499	7,948																																														
% grad change	1.1%	-0.8%	-0.4%	5.3%	1.4%	5.9%	2.3%	-2.8%	7.2%	6.0%																																														
Enroll at JCCC	1,385	1,374	1,369	1,441	1,462	1,548	1,584	1,539	1,650	1,748																																														
Sources	JCCC Office of Institutional Research Kansas Department of Education																																																							