



Community College Environmental Scanning Initiative, 2004

Conducted by SunGard Collegis

Objective and Process

ACCT's Member Communications Committee commissioned SunGard Collegis to conduct an environmental scanning initiative to identify the top social, political and other environmental challenges which are, or will be affecting colleges and communities in the near future.

The initiative included a three-step process. The first step gathered raw input from ACCT members during scanning sessions conducted during the 2004 regional meetings in San Antonio and Baltimore. A total of 212 members participated in these sessions. A total of 13 Meta trends and 67 sub-trends were identified during these sessions.

The second step was the distribution of an online survey to the scanning session participants. The purpose of the first online survey was to identify those trends considered most important by the cumulative responses. The first survey identified 20 trends that the majority of respondents identified as having the greatest impact.

The final step of the initiative was a second online survey asking the pool of participants to further narrow the list of top 20 trends identified in the first survey by selecting the top seven (7) that participants cumulatively found to be the most important for either their school or for community colleges in general. Participants were also asked to provide input describing the specific kinds of impacts they see affecting their institution or other institutions as a result of the described trend/issue. Secondly, they were asked to describe how their individual institution is responding to the trend, or intends to respond.

Executive Summary

In the process of analyzing the results of each of the three stages of the environmental scanning initiative it became apparent that there were a large number of trends and issues elevated that seemed to reflect higher level themes. Although the survey results speak for themselves in many ways, and readers may find their own meaning in those results, we wanted to share our view of the inter-connections and significance of the most important trends and issues that the membership identified. These tended to congregate around a few over-arching themes.

Time-to-Market, Just-In-Time

Community colleges have long been known for, and prided themselves on their flexibility. They are responsive to their communities and to changing markets for their services. Yet, we heard directly from the membership about a strong need for community colleges to become more "flexible." That need is reflected in a number of trends or issues that were of particular concern in the survey responses.

For example, the respondents pointed toward the likelihood that employees will have to be retrained several times during the course of their careers. They signaled rapidly changing financial conditions, important demographic shifts, and the steady growth of online educational opportunities. They also commented on the increasingly rapid pace of technological change. All of these, and other trends they noted, suggested that both the colleges themselves and employees in the workforce would face the need to re-tool in the face of unforeseen events.

In short, what the participants were feeling is not just a need to be "flexible" but rather a requirement to create organizational units and business processes that can rapidly adapt to sudden

shifts in the educational market place. These are requirements for schools to organize for continuous change or continuous improvement, with the added burden of not necessarily being able to predict well the directions of impending change.

Whole programs need to be developed, marketed, tracked for continued viability, and scoped according to environmental pressures or opportunities as they appear. The Internet and online learning have significantly impacted this challenge because the competition can be anywhere in the country, and in the future, the world. Schools that are slow to change may find themselves losing out for market share to schools located half-way across the country or in their own regions. In other words, schools are challenged to continuously abbreviate the amount of time it takes to get new services to market, or to eliminate those that are no longer profitable or needed.

Flattening the Financial Curve

Dealing with restricted financial circumstances is certainly nothing new for community colleges. But there is a different sense of urgency today. It comes from a developing feeling that being reactive to the ups and downs of public funding, the shifting vagaries of enrollment trends, or sometimes indeterminate development responses is no longer feasible, or at least too risky. It also stems from a widespread and strong feeling that governments at all levels are challenged to meet escalating demands on their resources. It may be less the case in the future that tight funding is as directly connected to economic and financial cycles. Rather, it may be increasingly a permanent challenge.

What is not immediately obvious in the direct survey responses are the connections of the financial picture to environmental trends such as those suggesting the just in time, time to market pressures noted above. Programs that are “suddenly” needed cannot be pulled back just because of an uncertain budget picture. It if takes too long to get the program to market the opportunity may be lost. Equally important is closely monitoring current services for their continued viability. The survey results suggest a strong need for strategic and tactical financial planning, as well as creative solutions to flattening the financial curve that most institutions face. Those plans would likely need to cover such disparate issues as financial aid processing, generating more profitable programs and courses (and discarding more quickly those that are not), resource development, and cooperative programs among community colleges and between 2-year and 4-year institutions.

In that regard there are a number of interesting trends the scanning participants noted. The complex budgetary pressures that community colleges face are not unique to them. Four-year institutions are also facing them and some are responding in ways that indirectly affect the 2-year schools. Rising tuition rates in some regions are causing more traditional undergraduate prospects to go to less expensive community colleges first and then to complete their degree work at a four-year institution. In areas affected by this trend the average age of the community college students is declining. This changes the market and affects both course delivery and program development. Many respondents also saw opportunity in expanding for-credit options into the high school environment.

Business Process Redesign

Business process redesign (BPR) was not explicitly addressed in the scanning data but is readily apparent in a wide variety of responses. In order to be as adaptive and responsive as several highly ranked trends suggest, institutions will need to closely examine their business processes and align them to support the anticipated environment of change. Flattening the financial curve requires

complex solutions. Institutions will be under rising pressure to achieve cost savings and increase efficiencies. They will also need to monitor on an ongoing basis the cost effectiveness of their programs. As new student populations are identified and the challenges of an increasingly diverse demographic environment intensify the executive leaders will have to ensure that their business processes are shaped accordingly. Continuous improvement processes will need to become the norm if the trends detected by the survey respondents continue to reach fruition.

Closely related to the BPR implications of the survey results are the shared concerns with tighter security and accountability. The members pointed to the obvious increase in security concerns across the globe but also pointed to internal (U.S.) matters that are impacting colleges. These range from new regulations, including restrictions on immigration, to matters of information security within the colleges. Information security has become a serious issue that needs addressing at the highest levels of administration and that requires both process changes and technology applications to successfully address.

Innovative, Fast-Changing Educational Environment

Several of the highest, high priority items in the survey results point to a very challenging educational environment. Respondents believe that as much as 80% of the jobs of the future will require some form of post-secondary education. Demographic changes, which are occurring more frequently, bring shifts in learning styles and needs. In pointing to the likelihood that people will have to retool their skills several times in their working lifetime the survey respondents specifically noted that this was not a question of skill updates, but rather one related to major career changes.

A whole other set of pressures on education complicates the picture. Although some concern was expressed, the membership in general did not seem strongly concerned with competition from for-profit or virtual colleges and universities. What did seem problematic was the rising acceptance of digital delivery methods and the growing sophistication among colleges in their use. In a sense, this makes potential competition more difficult to predict and confront. Complicating the picture is the fact that the American consumer has become more demanding of services in all areas. Expectations are rising as consumers look for speed, service, quality, and personalization in their transactions. It is a safe bet that this posture is being translated into their educational expectations. This in turn will obviously complicate delivery when paired with the difficulty of predicting constantly shifting educational needs. It also puts pressure on college budgets and facilities as consumers raise their technological and service convenience expectations.

In these challenges there are clearly also opportunities. There is opportunity in the need to re-tool people for changed careers, but only for colleges that can identify which people, which careers, and when. There is opportunity in reaching out to changing student populations but only if colleges can identify the changes soon enough and respond to them quickly enough in the right manner. Faculty and staff will need to become accustomed to change, and comfortable with the expectation that they will have to change several times over the course of their careers. Colleges will clearly need assistance with tracking and analyzing demographic, economic, and industry changes.

Understanding the Message

The survey respondents and participants in the focus group sessions were not raising alarms bells or pointing to impending doom, such as we heard so often when online education and for-profit schools first appeared. Instead they have pointed to major environmental trends that are impacting colleges today or that are visible on the horizon. These trends and issues will not uniformly affect all colleges, some of them will have greater affect in one region or another, and some will have little affect on certain areas but a significant affect on others. What is clear, however, is that the respondents have identified some high level matters that will almost certainly impact colleges; whether for the good will largely be determined by how well institutions prepare to respond to change quickly and effectively.

What is remarkable in the results of the environmental scanning initiative is the degree of synergy that exists among the trends or issues identified, and the degree of complex inter-connectedness that underlies potential actions. This can be dismaying. Attention needs to be paid to all of the high level findings discussed above in order for any of them to succeed. One cannot imagine becoming especially nimble in addressing a fast changing market without creative financial solutions, internal culture change, and far-reaching business process redesign. Investments in technology will clearly be needed despite the continued uncertainty of budgets and financial resources.

There is a clear indication from the scanning participants that schools need to be less reactive and more proactive. In the most recent issue of *EDUCAUSE Review* Richard Ekman observed: "...colleges and universities—large and small, public and private, contiguous and scattered—have much to gain from collaboration through technology." This same theme applies to non-technology driven areas of potential action that the members have signaled in our scanning initiative. The ACCT itself is well-positioned to assist its members. It is a natural forum for surfacing and disseminating information to help identify shifting trends; for sharing effective practices in change management or business process redesign; for assisting schools in different regions or from different tiers in the education hierarchy in coming together to form new kinds of partnerships; and for providing executive development activities to help trustees looking to lead their schools in responding to the trends identified, or to support their presidents and vice presidents as they seek to rise to those challenges.

Top 20 Trends Ranked From Greatest to Least Potential Impact

Rank	Trends	Count	%
1.	Governments at all levels struggle to meet greater demands with limited resources.	17	65.38%
2.	New delivery options for education and educators (online / hybrid) is having a rising impact on traditional community college education.	14	53.85%
3.	The mix of the community college populations is changing constantly and require much more flexible approaches to training and education.	14	53.85%
4.	Expectations are rising as consumers learn to anticipate speed, service, quality, and access in all of their transactions.	13	50.00%
5.	Rising healthcare costs are challenging all employers, including local, state, and federal governments.	13	50.00%
6.	Eighty percent of the new jobs created in this century will require some education beyond high school.	13	50.00%
7.	Critical labor shortages are likely to continue in high-tech, teaching, and health care fields.	11	42.31%
8.	Technology is creating new ways for people to communicate and associate.	9	34.62%
9.	As businesses become more global they are more affected by, and reactive to global trends, labor shifts, competition among providers across national boundaries, etc.	9	34.62%
10.	The college system has an opportunity to expand credit options at the high school level.	8	30.77%
11.	Security and privacy are becoming critical issues for all institutions. This includes concerns with regulations, new legislation, new accounting standards, immigration restrictions, and the like.	8	30.77%
12.	The rate of innovation in science and technology is increasing.	8	30.77%
13.	The demographic characteristics of the American population are becoming much more diverse and are subject to much more rapid change than has been traditionally the case.	6	23.08%
14.	There is an increasing gap between the more formally educated and less educated.	6	23.08%
15.	There is a long-term shift in the ethnic makeup of the population, particularly among youth.	4	15.38%
16.	Work itself is becoming more global in that workers at all levels find themselves working abroad while those in this country are in increasing contact with nationals in other countries in executing their responsibilities.	4	15.38%
17.	Increasing personal economic uncertainty is becoming a daily concern for many Americans in terms of their long-term financial security.	3	11.54%
18.	There no longer can be a sense of certainty for one's economic security in the future.	3	11.54%
19.	Security and privacy have become major concerns reaching into many levels of our society and across national boundaries.	3	11.54%
20.	Once owned by experts and authorities, information is increasingly within the reach of the average citizen.	1	3.85%

TREND IMPACT AND POSSIBLE ACTION RESPONSES

Listed in Order of Ranking Priority by Respondents

Trend #1: Governments at all levels struggle to meet greater demands with limited resources.

How is trend #1 impacting your college or others?

Responses
Governmental support is decreasing or rising at less than costs are increasing.
It is causing many community colleges to increase their private fundraising efforts.
Government cash flow is slow.
More requests.
State funding continues to decline.
Rapid growth of enrollment and decreasing state and local funding makes for difficult decisions.
Many restricted purposes state grants have been reduced or eliminated. State budget allocations to postsecondary education have been reduced in recent years. Assessed valuation of local property is decreasing. Therefore, 2 of our 3 revenue sources (property taxes and state apportionment) are decreasing.
The college is not able to allow employee compensation packages to increase with the rate of inflation.
Shrinking state funding.
Our state share has decreased from 28 % to 23 % their share of our budget this past year.
More costs, less resources.
Due to state government's dwindling resources, larger and more frequent tuition increases are mandated. Rising tuition/fees costs reduce the number of students that can be served with available financial aid. Colleges are unable to sufficiently pay faculty at competitive rates causing a deterioration of quality faculty to teach the students seeking higher education.
The trend is spiraling and we need controls that will freeze the cost.
North Carolina Community Colleges are seeing record levels of enrollment while at the same time seeing budget reductions. Because of this funding crisis we are forced to look critically at the services/programs we offer and make strategic choices regarding which will be continued. In some ways this is healthy for the system because it forces us to discontinue non value added expenditure of resources. At the same time discontinuing a program that services very small audiences is still not something we like to do.
State funding for community colleges in Texas has declined to the same level as 1994. Funding has decreased during a time of increased enrollment. Many of the state community colleges have increased tuitions to help offset these reductions. Access to underserved populations may be denied if this trend continues.

What actions are required to respond to the trend at your college or others?

Responses
Emphasis on efficiencies, eliminate losing programs, increase tuitions.
Community colleges are seeking non-government funding sources, especially to fund scholarships.
Get the government to make the college priority.
We've got to develop the ability to say "no". Got to make the case credibly about resource declines. Also, need to be able to understand and effectively weigh priorities, so that we do not keep on doing what we've always done.
We have increased tuition and slightly increased our tax rate.
Increase tuition and fees which limits growth as students cannot afford us. If access to community colleges is limited, there is no other place to go.
Our College has shifted as much of the funding burden to our students in the form of tuition costs as possible. We are currently one of the highest tuition rates in our state. We have leveraged bond issues to maximum benefit for capital construction projects that were desperately needed.
Raise local mill levies.
We had to raise tuition to the students and we are levying at the max on our property tax.
Raise tuition.
Colleges will have to offer larger class sizes to bring economies of scale. More on-line classes will have to be taught....causing a loss of the teacher-to-student relationship enjoyed by community colleges in the past.
Coalition effort among our 23 colleges in Ohio to demonstrate this economic impact upon us.
We look critically at all services offered and evaluate any given budget constraints we might have and determine what best meets the needs of those we serve. Sometimes these are difficult decisions to make but they are necessary given our current funding situation.
State support of funding for community colleges must become a priority.

Trend #2 - New delivery options for education and educators (online/hybrid) is having a rising impact on traditional community college education.

How is trend #2 impacting your college or others?

Responses
We are number one in Illinois of all 47 community colleges; we have 10% of our head count taking such classes. Big impact.
Need to increase use of technology with registration and course offerings.
There is a greater demand for Distance Learning programs.
Students want more access to online courses at reasonable costs.
Our administrative systems are not prepared for many different start and end times for registration, classes etc.
Our college is offering more on-line courses. Students that normally wouldn't be able to enroll in a class at a specific convenient time are now able to take the class on-line.
We are going totally electronic to accommodate education demand. Distance Learning courses are some of our most popular offerings.

Sparse population and long distances demand/dictate learning.
The demands placed on learners are constantly changing and we must as learning institutions recognize these changes and adjust our course delivery methods to support this need.
The need for faculty training and acceptance of new technology online and in the classroom has increased.

What actions are required to respond to the trend at your college or others?

Responses
More flexibility, commitment to quality, and dedicated staff to this issue.
Continuing efforts to develop procedures utilizing state-of-the-art procedures and finding ways to meet the increased costs.
Within available budget funds and faculty resources, more courses are being offered through Distance Learning.
We are now offering many hybrid courses and a nontraditional night and weekend programs leading to an associate degree.
Put more classes online while trying to limit costs for developing and delivering courses.
More flexible and easier to use administrative software.
Continue to meet the needs of our education and educators using online education.
Investment in more technology and coordination of technology platforms with state government.
We need to be knowledgeable of the other requirements outside of those of the college that are placed on our students and define methods that still make the learning experience possible for them.
We have implemented a training center for faculty with an objective for both new courses online and blended course development.

Trend #3 - The mix of the community college population is changing constantly and requires much more flexible approaches to training and education.

How is trend #3 impacting your college or others?

Responses
Our business development center is offering more short term and flexible scheduling.
Large numbers of older adults are enrolling in community colleges to be retrained as a result of being laid off from their jobs at manufacturing plants that have closed.
Constantly work on change and hammer away to those who want to keep everything the same as it used to be that change is constant and won't stop.
Trying new ways of delivering education (i.e. - weekend courses, online courses and flexible scheduling all help to cater to changing populations).
Our campus average age is 27. We are designing our offerings to accommodate more students in this category.
As noted in the question, flexibility is the key. The traditional 16 week semester offering classes from 8:00-4:00 is no longer enough. We look for all manner of methods for instructional material deliver and how to deliver those materials on a schedule that meets the needs of the student population.

This issue impacts the delivery of education and also the programs that are offered.
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What actions are required to respond to the trend at your college or others?

Responses
More flexibility.
Community colleges are offering more Remedial courses, Adult High School programs, Customized Continuing Education retraining courses, and GED programs.
Culture shift and professional development to achieve it.
Course offerings for the working students.
We compress courses into shorter time periods or extend them beyond the normal 16 week semester. We offer courses on the Internet, as a hybrid or any other means that will reach potential learners.
Flexible program offerings, on-line courses, blended courses, are means to vary the delivery of programs. In addition, the college reviews the currency of program offerings adding new offerings and phasing out those where the job market has changed.

Trend #4 - Expectations are rising as consumers learn to anticipate speed, service, quality, and access in all of their transactions.

How is trend #4 impacting your college or others?

Responses
We are the number (#1) community college provider in Illinois with almost 10% of our headcount taking an Internet class.
There is an increased demand for Information Technology Services to improve speed, service, quality, and access to consumer transactions.
Students expect a high level of technology. The college has trouble keeping up with the level of technology students have in their homes.
Students bring those expectations to the college and it affects administrative services.
Computer instruction and Internet access are mandatory and require a huge financial investment to maintain state of the art technology.
Demands on staff in terms of skills, abilities and output are increasing.
Students can be more selective about where they attend college. If they detect that the quality does not meet their expectations, they are likely to go to another college or take on-line classes.
We are meeting the needs of the consumer with our course curriculum in the service area.
We are expected to provide that same level of service in transactions we have with our students as they would see in other for profit institutions.
Maintaining cutting edge services in technology has required increased use of resources for IT staff, software, and training. Educational services are driven by consumer market demand and the delivery of the services must meet this demand.

What actions are required to respond to the trend at your college or others?

Responses
Orient our faculty to teaching online and invest in professional development.
Within existing budget resources, colleges are upgrading their college Information Technology Systems.
Review of all college systems is underway.
We offer a significant number of courses in various formats to meet the needs of our busy students. Many classes are available: in open lab environments, as stored media (video tapes), Internet courses, and distance learning through interactive compressed video. We are currently exploring the potential of a wide area wireless network to span our community college district and include all of our high school partners.
Additional staff training or adding staff positions.
More attention is given to new students to make their initial (and subsequent) enrollment a pleasant experience. This requires all faculty & staff to be receptive to helping students complete enrollment and registration processes.
Course offerings to respond to these needs.
Continuous upgrading of our work processes is required to deliver this level of service. While this is an important responsibility it is also uses resources that might otherwise be used for training.
We are increasing offerings over the Web and also integrating technology into the classroom. Over the past two years WCJC has purchased and installed a new software system and provides greater assess and service to our faculty and students.

Trend #5 - Rising healthcare costs are challenging all employers, including local, state, and federal governments.

How is trend #5 impacting your college or others?

Responses
Adopt plans to pass more of the costs on to final consumer/employee where more awareness might help restrain excessive use and abuses.
Increasing cost of healthcare and medical insurance is causing financial hardship for students and faculty.
Very much--the state is paying less and the college must pick up more costs.
Causing our employees to bear cost increases over and above their periodic wage increases.
We struggle to pay for ever increasing costs.
Eating up operating budget.
Our College is self-insured and healthcare costs were a major component during union negotiations with faculty and staff. Healthcare costs continue to put a tremendous burden on our limited budgets.
Ways to contain healthcare costs or more innovative ways of delivering healthcare will be issues as we train the next wave of healthcare workers.
Fewer people can afford the high cost of insurance.
Detracts from financial resources devoted to the teaching/learning mission.
Ston reelecting the same neoble who refuse to face this problem.

We have an aging faculty and in one year our health care costs increased one million dollars. The past year we maintained no increase. You don't know when you will be hit.
Cost goes up annually, passed on to consumers.
The increasing cost of healthcare is present in the increasing costs of training healthcare professionals. Healthcare instructors, equipment, supplies, etc. are all more expensive. Additionally, the cost of providing health insurance for employees is rapidly increasing, making it more costly to the community college to offer healthcare curricula.
It is seriously impacting our college. With health care costs rising we need help. We have sent letters to our legislators asking for assistance.
Attraction and retention of top employees in the community college system is becoming more competitive.
Much like the rest of the county, this is a concern for the North Carolina Community College System. It impacts operating cost for the System and affects quality of life of employees. It is an item that that the Community Colleges can not solve, but must work to manage the impact. It is a national issue that is at a crisis level that hopefully will be addressed by this cycle of political leaders.
Out-of-pocket expenses have increased by approximately \$900 a year for all employees. I anticipate this trend will continue.

What actions are required to respond to the trend at your college or others?

Responses
There is an increased need for student financial aid counseling and assistance to find and pay for child daycare services, especially for students; as well as a need for financial planning services to help students meet everyday family budget obligations.
We must look at options as benefits are very important to our employees.
Need to figure out a way to stem the bleeding. Better but lower cost plans.
More employee contributions.
Consortium agreements may help
Employees now have greater deductibles and more cost for family healthcare. Further concessions in the future may be sought during union negotiations.
Creative thinking and input from students and others in the field is crucial to successful outcomes.
The State of Wyoming has responded by having the State pick-up 85% of the cost of insurance for state agency employees, including college employees.
Employees are having to pick up more of the cost.
Spend smarter - plan better - Colleges may have to start thinking about using their own health centers as the primary medical center for employees. This way the college can control the costs.
We are in a self insured plan and we encourage wellness.
Raise tuition.
Perhaps developing closer relationships with area hospitals and seeking their advice and financial support for developing the workforce that they'll be hiring.
Shopping for the best health costs possible. Writing letters to our area legislators and most importantly working with our college staff.
Develop ways to offer paid benefits at reasonable costs.

Involvement with legislative leaders to make sure they give this issue the appropriate level of priority. Work within the provider network to get best value for employees.
Increased state funding to cover the cost or reductions in the cost.

Trend #6 – Eighty percent of the new jobs created in this century will require some education beyond high school.

How is trend #6 impacting your college or others?

Responses
Both older and younger students are more aware in this Information/Knowledge driven economy of the need for education and training beyond high school, especially in the high technology occupations.
Increased enrollment and workforce development needs.
Technical program enrollments are increasing faster than traditional academic course enrollments.
Increased enrollment - large increase in returnees for retraining.
Growth – capacity.
Enrollment is at an all-time high. The population is well aware that well-paying jobs require more than just a high school education.
Promotion of continuing education is being done by our recruiting depts. of the college.
Unemployment on the Reservation is over 50%.
Our enrollment has been strong and is increasing.
Clearly it will increase enrollment, but it will also create challenges in identifying what education is needed. Since most Community College students do not seek employment that is geographically located significant distances from where they live, one of the challenges will be to provide them with training for employment in jobs that are not yet defined.
Greater demand for job specific programs is one impact.

What actions are required to respond to the trend at your college or others?

Responses
This trend is reflected in the enrollment increases in most community colleges, especially among older unemployed students who are seeking retraining in new job skills that are different from their previous jobs. It is also reflected in the counseling and student support services for older, and younger, unemployed students seeking retraining.
Increase course offerings. This necessitates increasing the number of part time faculty.
Finding qualified faculty; offering more courses; and looking for funding supplies and equipment outside of traditional funding sources.
Operating and capital funding to address the growth.
Educational awareness and getting the word out that will attract students back to the community college. We are working on this daily.
Create seamless ways to move from junior high school grades through advanced education opportunities.
We have to offer more with less resources.

Continuous contact with all government agencies that are involved in job creation so that the colleges are preparing students for jobs that may not yet exist but will when training is complete.

Increased program offerings for one-year certificates and career ladder programs along with partnerships with business and industry are some actions we have taken to respond to this trend.

Trend #7 - Critical labor shortages are likely to continue in high-tech, teaching, and health care fields.

How is trend #7 impacting your college or others?

Responses
We don't have a problem attracting the best faculty because of our reputation and pay rate.
Continuing pressure for additional funding to need increasing operating expenses.
There is a greater demand for education courses to train teachers and an increased demand for Nursing curriculum programs.
We are asked to increase size of expensive programs in health and ones for which faculty are often hard to find.
We have increased number of students applying for allied health programs and high tech classes.
The biggest impact on our college because of this trend is that of being able to attract qualified faculty, in terms of our pay scale.
It has required us to adapt our offerings to meet these demands. The community college is more adept at meeting societal changes than the four year institutions.
Short supply means higher costs to hire professionals in these fields. Continuing education costs increase for existing faculty.
We are adjusting our college programs to fit the needs of this century. Teaching and nurse certification are at the top of the list.
Labs, equipment, sponsors, and creative delivery systems are needed.
It has been a problem for us on a limited basis. Health care has been a bigger issue than high-tech. We currently do not offer a nursing program. We are exploring it as a possibility, but finding the funding needed to build a program and qualified staff to support it in a rural community has been difficult.
Labor shortages in the health care fields have increased enrollments in those program areas, but without adequate faculty and resources enrollments have been limited.

What actions are required to respond to the trend at your college or others?

Responses
We continue to offer the best environment for teaching.
Make each program cost effective or find ways to partner with and to share increased costs with employers and other beneficiaries.
Within instructional funds available, colleges are adding capacity for Teacher Education and Nursing curriculum programs.
Our Board approved an Associate of Arts in Teaching Degree this year.
Started an evening-weekend Nursing program.

We have added an evening LPN program and expanded clinical opportunities into second shift assignments at area hospitals. We have added security and other specialty options as extensions to our computer and networking programs.
As shortages continue in these fields, certain aspects of their training will create highly specialized professions to fulfill specific industry needs. Community Colleges can be very adaptive to doing meeting training needs.
Curriculum adjustments. I serve on the Business and Industry Council and I am stressing workforce development based upon the needs of these areas.
The North Carolina Community College System does not supply funding to start new programs either for buildings, staff or equipment. They will support programs after their first year of operation but not in the start-up stages. We are currently looking for sources of funding through grants to provide the resources needed to respond to these new challenges. As might be expected, so are most other schools so competition for funds is fierce.
Increasing faculty salaries (adding a stipend) to complete for health care faculty in currently under consideration. In addition, WCJC has added all three Texas Higher Education Coordinating Board approved curricula for the Associate of Arts in Teaching degree to encourage and facilitate transfer.

Trend #8 - Technology is creating new ways for people to communicate and associate.

How is trend #8 impacting your college or others?

Responses
We spend \$500,000 annually on computers for our labs and other usage.
Computer generated communications are inventing new words and spelling into the English language.
Getting people to take responsibility for accessing the readily available information about college "happenings."
Communication speeds have increased dramatically causing response times to increase as well. Email also documents to whom and when correspondence has been made.
We have new technology in the electronic field to communicate our programs and use technology to deliver services.
Technology is changing the way we live and work. We need to understand this continuous high speed rate of change and work to prepare our students to meet these challenges.
Internet and Intranet communications have created a need for regulations and training.

What actions are required to respond to the trend at your college or others?

Responses
Our investment annually in computers and technology is significant.
Insist on using proper verbiage for written and verbal communication among students and staff in order to preserve the language or develop accepted new usage standards for the American English language.
Professional development, use of technology as standard.
Faculty and administration must embrace the use of technology in communications as an efficient means of planning and problem solving.
Our environmental scanning has provided the necessary information to continue meeting the needs of

our students.
As noted above, the internet is one item that has changed what information is available and to whom. There are numerous other examples, but the "good old" days when rate of change was slower are gone. Faculty and staff development is critical to keep them up to speed with these changes.
All college employees have access to Internet and Intranet services. Email convenience also requires shorter response times. College employees are required to use the email for memorandums and other college communications. Most administrative functions are paperless processes. This expedites administrative services. College faculty and staff are still required to have group meetings on a regular basis to encourage face to face communication.

Trend #9 - As businesses become more global they are more affected by, and reactive to global trends, labor shifts, competition among providers across national boundaries, etc.

How is trend #9 impacting your college or others?

Responses
Not affecting our college.
Less certainty about what jobs will be outsourced and therefore what degrees and certificates will be valuable to students for future employment.
Internationalizing the curriculum, emphasizing multi-cultural perspectives, need for an office to coordinate global initiatives.
We have recently lost two of our largest industrial companies who closed their local plants. They have moved production to Mexico and out of our state.
More of the existing workforce is returning to college to cross-train, change careers, and/or update skills to stay current with developing trends.
We are on the firing line of this concern. Global trends are being reviewed by our environmental scanning teams. Recommendations are coming forward.
The non-traditional student needs to be more tuned to the life long learning model.
Some businesses in our region have been significantly affected by our move to a global economy. We have lost businesses that have relocated outside of the U.S. or businesses have suffered from international competition. For the Community College that means higher unemployment and larger numbers of students that need to be retrained.
This trend has impacted our college by increasing the need to revise or create new programs. Competition has also increased in the educational market. With the increase in online education products, a student has a larger market to select from.

What actions are required to respond to the trend at your college or others?

Responses
We are offering more short term Spanish classes.
Trying to get straight answers from local industry.
More staff to address.
We have hundreds of displaced workers who are currently attending our college to upgrade their skills for other employment opportunities.
We offer more online courses and more classes at non-traditional times such as more weekends and or late night.

Curriculum changes and we are going from quarter hours to semester to fit the needs of the students.
Campuses have to be non-traditional-friendly.
We are forced to be more flexible and creative in outlining plans that support the needs of those we serve. Understanding labor market trends, supporting those businesses we do have by providing guidance assistance as the look at ways to retool their workforce to make them more competitive.
New program development to respond to the changes in labor markets and providers was required. The college is also marketing programs and services over our web page.

Trend #10 - The college system has an opportunity to expand credit options at the high school level.

How is trend #10 impacting your college or others?

Responses
More high school students are enrolling in community college Advanced Placement courses, Tech Prep programs, and Dual Enrollment classes.
Many area high schools are partnering with our community college to provide college transfer courses within their high school. Most occupational courses are offered at the community college campus and high school students attend at the college location.
Concurrent enrollment is the fastest growing segment; finding it difficult to keep up with the demand because of availability of qualified faculty.
We have been offering credit to high school seniors for several years.
We are offering classes in high schools and working collaboratively with the k-12 system.
More high school students are enrolling in college level classes. High school students are generally not as mature or dedicated as the typical community college student.
We have brought the credit option to our branch campus located at the high school.
We are growing this area, our local school districts are not too cooperative.
The increase in dual credit offerings is one impact.

What actions are required to respond to the trend at your college or others?

Responses
Community colleges are adding capacity and faculty when and where possible within existing budget resources to accommodate the increased demand for optional credit programs.
We are streamlining our process to better serve more high school students that wish to earn college credit during their junior and senior years.
Provide financial incentives for high school faculty to take graduate work to qualify them to teach college courses.
Models for dual enrollment.
Develop close relationships with local high schools.
Continuing to add more classes to our college curriculum.
We are visiting all 28 high school boards at one of their meetings. takes a lot of time and effort by us.

WCJC has increased offerings to all area high schools.

Trend #11 - Security and privacy have become major concerns reaching into many levels of our society and across national boundaries.

How is trend #11 impacting your college or others?

Responses
Related costs of compliance are increasing.
The need to increase campus security.
We need better systems for IT security.
We are minimizing the use of student social security numbers and generating another random student ID number. We are converting to a new institutional database with more limited access by employee area of responsibility. Many employee and student demographic fields are identified as confidential and secure information with very limited personnel having access to that data.
Maintain secure records for students and staff to of growing concern.
We have addressed this by planning and having a capable staff.
Our college has implemented tighter security and controls on our computer networks and Internet access. More resources are now spent to protect our computer/networks from security breaches by outsiders.
Loosen the regulations from a federal standpoint to gain access and share best practices among health care providers.
Increased need for security staff and IT staff has placed a demand on resources.

What actions are required to respond to the trend at your college or others?

Responses
Address requirements in most cost effective manner.
It is necessary to protect against the threat of global terrorism, as well as to protect against the increased threats of domestic violence and from disgruntled fired employees.
Money and people with expertise.
Working with IT pros to make sure the school is as secure as possible in the area of personal privacy for students and staff.
More attention to this.
Again, speaking with our legislators. This is something we intend to do at the National legislative conference in D.C.
In addition to the additional physical security noted above, legitimate concerns regarding the privacy of information have also needed to be addressed. As the information used to manage the school and support students becomes increasingly electronic, maintaining the privacy and security of that information becomes much more challenging. This also adds cost that might otherwise have been directed to student education.
Increasing staff and tightening of regulations.

Trend #12 - The rate of innovation in science and technology is increasing.

How is trend #12 impacting your college or others?

Responses
Our faculty have to stay in touch with what is happening.
It is difficult to keep current with equipment upgrades and textbook revisions.
Bio-tech program is under evaluation.
Expansion of laboratories and classrooms is targeted for science and technical curricula.
Staff re-training and in-service programs our being employed.
It is difficult to keep faculty and staff current with the current rate of innovation. Increased teaching load caused by budget constraints leaves little time for faculty and staff to keep up with new developments in their respective areas of responsibility.
Maintaining currency has become more difficult.

What actions are required to respond to the trend at your college or others?

Responses
Our commitment to our advisory boards, futures conferences, and connection to the community.
We continually seek grant funds to help defray technology upgrade costs. We are currently reviewing options for textbook rentals or loans to address student concerns about excessive costs of textbooks (especially in health, science and technology fields).
(More) Students to sign up for the Bio tech program - jobs are there, but students aren't.
College must invest in the continuing education of their instructors so they can stay abreast of industry trends and be able to teach those skills.
Continuing to update our educators on the newest technology available. It is working -- the feedback has been positive.
As we look for alternate methods of making (available) the learning experience to an ever changing population, we need to use same thinking as we look for ways to keep the institution on the front end of these changes.
New equipment for current programs and services is essential and expensive. We are actively seeking and receiving grant funds to assist with the cost. New program development is also imperative to serve the needs of business and industry. Partnerships with business and industry along with other educational institutions have helped maximize resources and allowed the college an opportunity to bring high cost programs to our area.

Trend #13 - The demographic characteristics of the American population are becoming much more diverse and are subject to much more rapid change than has been traditionally the case.

How is trend #13 impacting your college or others?

Responses
Increased pressure to maintain diversity in staffing and continuing need for course and program modifications.
It is necessary to bridge multi-language barriers.
Causing us to develop insights/approaches into how to respond much more rapidly to educational services needs than we have historically had to.
Multiple languages need to be addressed by ESL.
We have dramatically increased number of students in Adult Education and ESL classes.
ESL is growing.
Our student population is becoming much more multi-lingual. Language barriers increase a students' risk of classroom failure.
Tremendously impacting this nation. I believe for the best. The Latino population is becoming a majority rather than a minority and their platform is helping others.
The need for the workforce to become LIFE LONG LEARNERS has caused a shift in our student population to more non-traditional students. Retraining and older student population has caused us to take another look at how and what we do in classrooms and other campus activities.
Texas has experienced an increase in minority population and according to the state demographer, Hispanic populations will continue to increase. Currently we are a majority minority population. The need for special services to recruit and retain these populations place demands on current resources.

What actions are required to respond to the trend at your college or others?

Responses
Monitor programs and course offerings to assure they keep pace with changes and continue to meet the needs.
Community colleges are offering more ESL courses and providing interpreters for immigrants and foreign students.
Hiring more instructors/faculty/staff who are bi-lingual or multi-lingual.
We are currently renovating additional classroom space to dedicate to the Adult Education program to meet the growing needs.
More instruction in ESL and in remedial classes.
Must offer more ESL classes to the non-English speaking population.
Legislative action letters, phone calls, etc. to bring this to the top of the priority list.
This is not a new phenomenon to the Community College System. During Vietnam there were large numbers of non-traditional students that flooded the system and caused us to re-evaluate how we work. Some things have changed, but we know that we serve an ever-changing population and we must continuously look at those we serve and adjust to meet their needs. We attempt to build enough flexibility into all of our work processes, including classroom instruction, so that we can adjust when needed.

Each community college in Texas, including Wharton County Junior College, has initiatives to enroll and serve more of this population-estimated at 500,000 by 2015.

Trend #14 - There is an increasing gap between the more formally educated and less educated.

How is trend #14 impacting your college or others?

Responses
More investment in remedial education.
A very large percentage of entering students do not have adequate basic skills to be placed in college level courses.
We believe it is our job to help close that gap.
We are emphasizing the importance of the K-14 plan and showing that more education will bring about a better job.
This trend has increased the need to provide remedial education and opportunities for underserved students.

What actions are required to respond to the trend at your college or others?

Responses
More investment in remedial education and we have a grant to pilot cohorts and other learning community efforts.
Out of necessity, we are dramatically expanding our course offerings (and delivery methods) for developmental classes in reading, writing and math. A huge percentage of students taking our ASSET placement exam are identified as needing remediation prior to starting college level classes.
Services to assist students are expensive so more \$\$ would help.
Scholarships and internships are helping respond to this need.
Community colleges provide the best opportunity for the less educated. We provide open access and remedial education to enhance retention. Community colleges also provide the most affordable education. Workforce programs also allow the student an opportunity to gain employment and then to continue their education with career ladder programs.

Trend #15 - There is a long-term shift in the ethnic makeup of the populations, particularly among youth.

How is trend #15 impacting your college or others?

Responses
Not much yet.
Major shift.
Need for better and more in depth understand of other cultures.
We are experiencing increased number of students in ESL classes.

We are offering courses at our branch campus which is located in our area high school.
Our geographic region has not yet been significantly impacted by these changes as seen in other areas. When they do it will require that we make adjustments throughout the institution.
The immediate impact is in the need to improve access for these populations.

What actions are required to respond to the trend at your college or others?

Responses
None
Professional development for faculty and staff
Professional development; more diverse faculty and staff hiring.
We are expanding space allocations for Adult Education and ESL instruction.
Colleges must seek to employ a diverse faculty/staff to reflect the student body diversity.
Satellite campus courses being made available to our youth.
We have only recently had enough demand to offer courses in English as a second language, but over time we will need to make other additions to our services to meet the changing needs of our population.
WCJC has increased recruitment and retention activities for these underserved populations.

Trend #16 - Work itself is becoming more global in that workers at all levels find themselves working abroad while those in this country are in increasing contact with nationals in other countries in executing their responsibilities.

How is trend #16 impacting your college or others?

Responses
Community college students, faculty, and staff are much more aware of the educational role they play in a global economy.
Need for US born students to study and become proficient in a second language. College needs to offer more foreign language coursed, particularly to prepare students to speak another language.
Multicultural Gen Ed. requirements - diversity programs.
Very little impact.
Asking for more assistance in creating small businesses is the way.
We have an international program to expose students to this, we have study abroad programs, we have trips and we have almost 250 international students and an active organization to support them.
We see a need to have diversity training.

What actions are required to respond to the trend at your college or others?

Responses
More specialized training programs in foreign languages, Transportation, Communications, and Information Technology are needed and being offered by community colleges within available budget resources.

More buy in for the need for diversity/multicultural education and training.
Our SBA unit at the college is helping with this and we have seen some major positive impact.
Our student life folks have to be on top of this group of students.
Increased offering in English as a second language or other languages along with diversity awareness.

Trend #17 - Increasing personal economic uncertainty is becoming a daily concern for many Americans in terms of their long-term financial security.

How is trend #17 impacting your college or others?

Responses
Long-term financial security and concern for the need for retirement planning has gained the attention of students and faculty at an earlier age, especially because of less long-term job security than before.
The average citizen recognizes the need for lifelong learning and continuous upgrading of skills.
Fall enrollment was flat with increased tuition and fees.
More students than ever are seeking financial assistance.
Finding finances to enable more to attend.
Results in older students returning and having counselors on top of this.
We are experiencing more mental health issues with both employees and students.

What actions are required to respond to the trend at your college or others?

Responses
Community colleges are expanding counseling services for students for greater job selectivity and job placement, as well as counseling to emphasize personal savings and careful financial investing as a personal responsibility.
Our college is constantly attempting to reassess the local pressures for pertinent training to meet the employer needs to build a skilled local workforce.
Increased state funding - the smallest part of our operating budget at this point.
Part-time jobs and scholarship opportunities and increased Pell grant funding.
Our career center has to be open to this group of folks.
Increased counseling services have been provided to assist employees and students.

Trend #18 - There no longer can be a sense of certainty for one's future economic security.

How is trend #18 impacting your college or others?

Responses
We find fewer employees retiring because of this uncertainty.
Increased enrollments in career classes and career upgrade classes.
People are worried and have become hesitant about attending college when the job market is so

uncertain.
Just have to prepare for change.
The sense of security that educators (both faculty and staff) enjoyed has changed.

What actions are required to respond to the trend at your college or others?

Responses
The good of fewer turnovers and the baggage of fewer turnovers.
A career - tech or vocational building is needed.
Job store and workforce development programs are working and are combating this trend.
More classes that provide basic computer skills.
Faculty and staff are more likely to move due to salary increases than before. Public institutions are less able to compete with salary offers in the private sector. Recruitment of new faculty in high demand areas is increasingly more difficult.

Trend #19 - Security and privacy are becoming critical issues for all institutions. This includes concerns with regulations, new legislation, new accounting standards, immigration restrictions, and the like.

How is trend #19 impacting your college or others?

Responses
No mandates without the funding to go with it. The immigration restrictions have resulted in about 50 less international students who were paying tuition.
More reports and paperwork are required by new regulations for security, privacy, accounting standards, and restrictions on immigration.
Needs to be addressed in IT.
The more security and privacy standards require colleges to invest in more sophisticated computer systems.
More red tape. Actually it is slowing us down. We need to let our agencies and federal regulators that we need to have more local control.
We are a very small community college with enrollment in curriculum programs of less than 1,000 students. At no time during the colleges previous 35 years has there been a need for campus security. Because of concerns from student and employee safety we have had to add in the past to years security guards to our staff. This is an unfortunate sign of the times that also is an added cost in an already difficult financial period.
This trend has increased cost in both time and the addition of staff.

What actions are required to respond to the trend at your college or others?

Responses
We are contacting our legislators about the immigration issue.
Community colleges are having to complete and file the required reports and employ more staff to

process the additional paperwork.
Hire staff that is competent to provide leadership in this area.
Currently investing in hardware and software to meet the informational and security needs of students, faculty, staff, and outside reporting requirements.
Educating our legislators on what this means to our college.
In addition to the additional physical security noted above, legitimate concerns regarding the privacy of information have also needed to be addressed. As the information used to manage the school and support students becomes increasingly electronic, maintaining the privacy and security of that information becomes much more challenging. This also adds cost that might otherwise have been directed to student education.
WCJC has added new regulations and procedures to address this area.

Trend #20 - Once owned by experts and authorities, information is increasingly within the reach of the average citizen.

How is trend #20 impacting your college or others?

Responses
We are working much more diligently on meeting the information expectation that people have in terms of our offerings, programs, and overall processes.
Students and the general public expect to access to high-end computer equipment at their area community college.
Hits on the library site are far greater than library in person traffic.
More people are able to be served by on-line classes. Even students that are located too far to drive to our campus are now able to be served by us.
Yes, it is. Our recent town meeting validated this and we have learned that the word is out about our college programs.
Everyone has to have computer skills to work or attend school.
Increased demand for accountability both from the public and legislative area is one impact.

What actions are required to respond to the trend at your college or others?

Responses
We have numerous open computer labs available to students and the community, in addition to sophisticated computer equipment within most classrooms.
E-mail for students.
Instructors need to be aware of different learning styles in today's environment.
Work with our movers and shakers of the community in getting the message out about the advantages of community colleges.
Computer labs and orientation classes.
Community colleges have always been held to standards of accountability particularly in the area of vocational/technical education. We have made more data available over our web.