



May 29, 2012

Dr. Thomas L. McKeon
Executive Director

Ms. Carla James
Director of Academic and Student Services

Roanoke Higher Education Authority
108 N. Jefferson Street
Roanoke, VA 24016

RE: Market Assessment For Roanoke Higher Education Center

Dear Dr. McKeon and Ms. James:

Thank you so much for the opportunity to work with you both on the market assessment for the Roanoke Higher Education Center. It has been a pleasure, and I look forward to seeing the Center continue to grow and prosper – the Center is certainly poised for continued success.

The first step in the market assessment was to provide a complete understanding of the demographic and socioeconomic characteristics of the market, the Roanoke MSA. To document the current market, CLARUS Corporation examined regional, state, and national data that provided a framework for definition of the markets and the current penetration levels. Key areas of interest examined were:

- Analysis of the population in the Roanoke region
- Analysis of the labor market in the Roanoke region
- Identification of the postsecondary education and career training providers in the Roanoke region

The results of the market analysis are presented in the document entitled *Market Analysis*, and the appendices provide the supporting documentation.

The next step in the market assessment was an examination of the current students attending the Roanoke Higher Education Center in Fall 2011. From this analysis, we were able to profile the current credit students and provide insight into the market segments currently being reached and used within the Center. The current student profile is also presented in the document entitled, *Market Analysis*.

Finally, the last step in the market assessment was to survey key external audiences (employers and adults) to help answer three key questions:

- What market segments are being served very well?
- What market segments may have additional opportunity for market share and penetration?
- What market segments are not being served and offer opportunity?

The results of the external assessment are presented in two documents, by market, entitled *Working Adult Scan* and the *Employer Scan*. The appendices of each of these reports provide copies of the questionnaires utilized and the supporting tabular results for the scans.

All of these documents are being delivered to you in two formats. A full-color printed copy of the reports and all supporting documentation and appendices is being mailed to you, along with a disk containing the



electronic versions of the reports. In addition, all of the reports and appendices are being posted for download.

The results and recommendations of this market assessment will provide the Roanoke Higher Education Center with the information to move forward in recruiting new educational partners and ensuring that the correct programs are being offered at the Center. The information contained in the market assessment will assist the Roanoke Higher Education Authority in defining the needs of their constituents across the Roanoke region and assist in developing a plan for delivering programming and services to those market segments.

As a final step in the research phase of the project, I am providing a summary of the main issues for the key markets for the Roanoke Higher Education Center on the following pages in an executive summary. The executive summary provides a summary of the key issues facing the Roanoke Higher Education Center and its partners.

If we can be of further assistance, please feel free to contact us for any additional help or clarifications.

Sincerely yours,

Kathi J. Swanson, Ph.D.
President

KJS:fed
Attachment

Roanoke Higher Education Center Market Assessment Summary

Purpose Of Market Assessment

To better define the educational needs of the various markets in the Roanoke region, the Roanoke Higher Education Center (RHEC) partnered with CLARUS Corporation to conduct a market assessment which would include the following information:

- Provide a market analysis of the current status of the Roanoke region including population characteristics, employment characteristics, income and poverty characteristics, and an educational profile
- Identify and describe all postsecondary education and career training providers in the Roanoke region
- Identify the academic needs existing in the Roanoke region and determine which ones are not being met by existing academic programs, specifically:
 - Identify specific degree, licensure, and certificate programs that need to be expanded, developed or considered in the future
 - Survey businesses to identify skill gaps in the current workforce, skills and training, professional development, and academic programming needs for future workers and opportunities for collaboration with the Roanoke Higher Education Center (RHEC)
 - Survey area households to identify current and future skills, educational and training needs, academic programming needs, and preferences for ways the RHEC should address these needs
- Identify the specific need for a Master of Library and Information Studies program in the Roanoke region, and forecast the potential enrollment in a Master of Library and Information Studies program

To complete the market assessment, secondary and primary data was used to provide current information about the Roanoke region. The secondary information was generated from already published sources. First, data from the latest census was examined to understand the population in the Roanoke region, to document the current educational penetration levels, and to forecast the trends in potential markets for the Center. Next, the educational partners were asked to provide specific demographic information about their students attending the Roanoke Higher Education Center in Fall 2011 to develop a profile of the student who attends the Roanoke Higher Education Center. By profiling the type of students who are currently attending classes at the Center, insights were provided into the potential for increasing current market penetration as well as opening new markets. Finally, a list of educational providers in the market area was developed and examined with respect to their scope and offerings.

Primary research was conducted with two distinct groups in the Roanoke region, more commonly referred to as the Roanoke MSA, and defined as the Virginia cities of Roanoke and Salem, and the counties of Botetourt, Craig, Franklin, and Roanoke. The two groups included employers in the region and adults interested in education. Personal and telephone interviews were the methodology used to interview 377 of the larger employers in the Roanoke region, stratified by business type, from February 2 to March 4, 2012. Included in this employer sample were 26 interviews with libraries, specifically focused on the assessment of the need for the Master of Library and Information Science degree. The survey of the employers had a reliability of 95 percent and a margin of error of ± 5.0 percent.

Telephone surveys and online surveys were the two methods used to interview adults in the Roanoke region. Four hundred telephone surveys were completed with adults who qualified for the survey by responding they were interested in education and training in the next year in the Roanoke region. These telephone interviews were conducted from January 18 to March 31, 2012. In addition, 37 online surveys were completed with

adults who had expressed an interest in the Master of Library and Information Science program from March 20 to April 2, 2012. The adult survey has a reliability of 95 percent and a margin of error of ± 4.7 percent.

After analyzing all of the secondary and primary data, recommendations were made for increasing attendance and offerings at the Roanoke Higher Education Center. While each research component has been addressed in its own document, the purpose of this executive summary is to bring all the comparable results from the research components together to outline the major issues facing the Center and propose recommendations for maximizing opportunity and working with the challenges. The following sections in this executive summary will provide a complete overview of the major issues the Center needs to address:

- Profiles Of Current Students
- Awareness Of The Roanoke Higher Education Center
- Current College Attendance
- Defining Credit Market Potential
- Defining Noncredit Market Potential

The results of this market assessment will assist the Roanoke Higher Education Center in documenting specific program needs, identifying gaps, and supporting current program offerings. Complete documentation of all the information contained in this summary can be found in the final report.

Profile Of Current Students

A key component of the market assessment for the Roanoke Higher Education Center is to understand the profile of the current students attending classes at the Center and enrolling with the partner educational institutions. Not only is it important for the Roanoke Higher Education Center to analyze the program trends, it is extremely important for the Center to have a better understanding of the demographic profiles of the credit students taking advantage of the offerings from the partners. In other words, who are the students most likely to attend and what are they like? To continue successfully recruiting credit students, it is important for the Center to understand the profiles of the students attending. This information is crucial in setting baselines for the marketing strategies so that success can be measured. In order to define these students, information from the application provides an excellent look at who the students are.

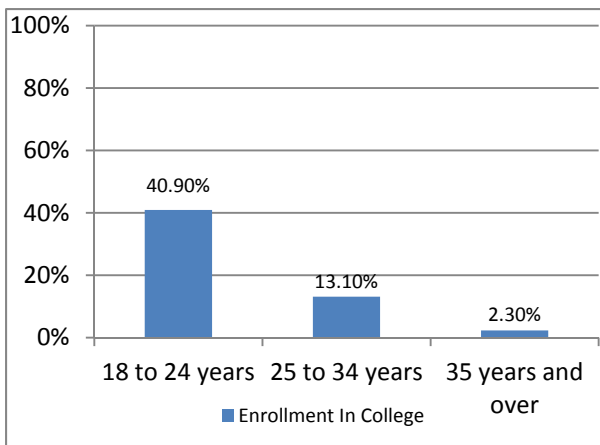
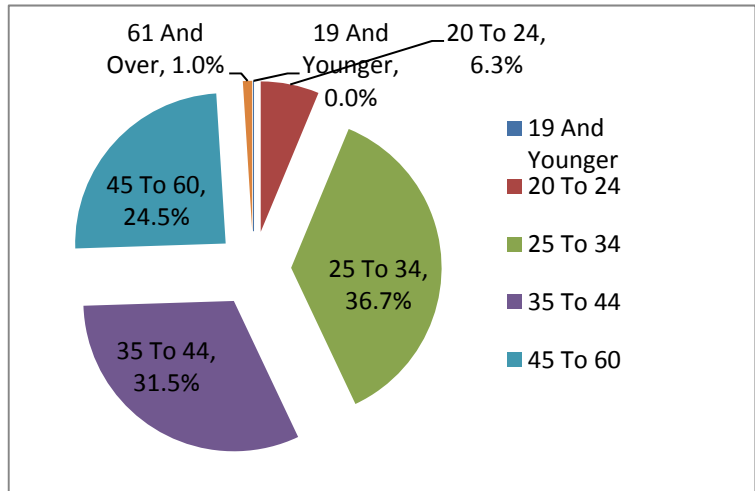
A memo was created outlining the data needed by CLARUS Corporation from the educational partners at the Roanoke Higher Education Center to profile the credit students attending the Roanoke Higher Education Center in Fall 2011, as well as students from the Roanoke area enrolled in online programs and not attending classes at the Center. This request was made to make an attempt at defining the overall educational participation in the market so total market enrollment could be calculated. Six of the partners responded to the data request – Averett University, James Madison University, Mary Baldwin College, Old Dominion University, the University of Virginia, and Virginia Tech. Combined, these institutions provided varying levels of information about 507 students enrolled at the Roanoke Higher Education Center in Fall 2011. Data issues had to be addressed with respect to the data received:

- All the data that was requested in the memo was not provided by the six partners – two of the partners did provide all information and others provided only certain variables. This resulted in a large percentage of missing information for the profiles, which should be taken into account when making conclusions.
- Each college coded the information provided in different formats, so all data had to be recoded to a common format. This may result in some variables not being named exactly as the partners provided. For example, for race, colleges used “White,” “Caucasian,” and “White – Non-Hispanic.” In the resulting profile information, the variables were recoded to the label for the majority of the responses.
- None of the partners included any enrollees from the Roanoke region taking online classes – the data provided were all students taking classes physically at the Roanoke Higher Education Center. The

outcome of this result is an inability to measure the overall market attendees from the Roanoke region and compare the percentage of those attending seat classes at the Roanoke Higher Education Center and those enrolling completely online.

In examining the profile of the current students attending the Roanoke Higher Education Center in Fall 2011, it should be noted that given the limited offerings and the timing of classes offered, the profile will also reflect the students who are interested in the current programming in the delivery provided at the Center. When examining this data, it is important to understand who is not being served and what the potential among that market may be for the Center.

The current students at the Roanoke Higher Education Center are primarily adults from 25 to 60 years of age (see chart at right). Slightly more than one-third of the current students are 25 to 34 years of age, almost one-third of the students are 35 to 44 years of age and one-fourth are 45 to 60 years of age. However, when examining the average age of each group, the adults in the 25 to 34 age group tend to be older (average age of 29) and in the 45 to 60 age group, the adults tended to be younger (average age 51). The range of adults most likely to be enrolled at classes at the Roanoke Higher Education Center will be 29 to 51 years of age.

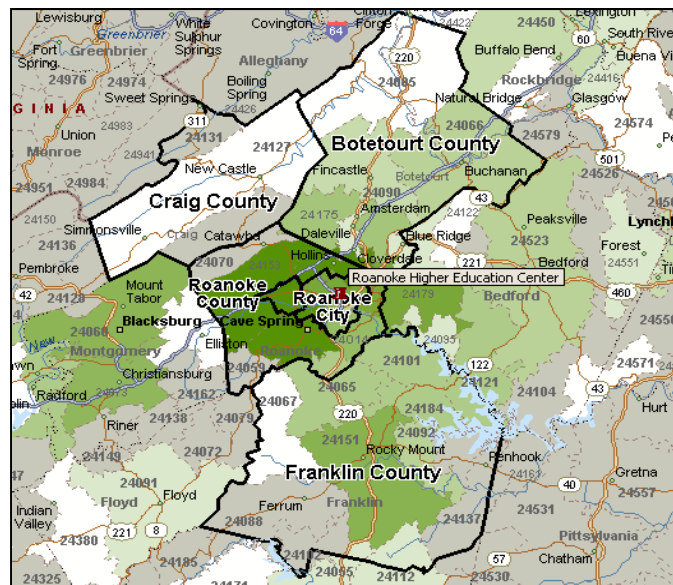


What is missing at the Roanoke Higher Education Center are the younger markets – those adults 19 and younger and 20 to 24 years of age – and these are the age groups that have the highest participation in education. Based on the 2010 Census, in the Roanoke MSA, among the 18 to 24 age group, 41 percent are currently enrolled in college or graduate school, compared to 13 percent of the 25 to 34 age group and 2.3 percent of the 35 and older age group (see chart left). As the adults age, their participation in college decreases greatly and it is more difficult to attract the 35 and over age group to educational opportunities. At this time, the Roanoke Higher Education Center is not attracting the age groups that have the highest participation in education.

Eighty-one percent of the Fall 2011 students at the Roanoke Higher Education Center are first-time students, but the older the student (45 to 60 years of age) the more likely they have attended college in the past (63 percent were first-time students). Ninety-four percent of the Fall 2011 students at the Center were also tagged as previous enrollees at the partner colleges and examining the admit dates for these current students, some of the first admit dates to the educational partners go back to the 1980s and 1990s. This indicates that the students who are currently attending, especially older students, have attended the educational partners in the past, whether or not they attended at the Roanoke Higher Education Center. Upon examination of the individual students' current program major, it appears many of the students working on Master's degrees may have graduated with a bachelor's degree from the same institution when they were younger.

The students enrolled at the Roanoke Higher Education Center also were likely to have attended another college prior to enrolling in classes offered by the partners at the Roanoke Higher Education Center, especially community colleges throughout Virginia and the United States. The institution most attended by the Fall 2011 Roanoke Higher Education Center students was Virginia Western Community College – 27 percent previously attended (and this did not include the Virginia Western Community College attendees in culinary arts at the Center). Twelve percent of the Fall 2011 students attended another college before their current institution, but the institution and location were unknown, most likely many years previous. Five percent of the students have attended Radford University and Virginia Tech, respectively, four percent James Madison University, and three percent Roanoke College and Dabney Lancaster Community College. Overall, 71 colleges were mentioned for previous attendance.

Ninety-eight percent of the current students live in Virginia, with one percent residing in West Virginia and the other one percent split among Georgia, North Carolina, South Carolina, and Tennessee. Forty-four percent of the current enrollees live in Roanoke City, 16 percent live in Roanoke County, 10 percent in Salem City, eight percent in Franklin County, and seven percent in Montgomery County. Geographically mapping the zip code of residence for the current Roanoke Higher Education Center attendees in Fall 2011 provides a much easier way to view the geographic residence. As seen in the map to the right, the majority of the students attending the Roanoke Higher Education Center in Fall 2011 live within a 30 mile radius of the Roanoke Higher Education Center. In the map to the right, the darker the color, the higher the concentration of students in that zip code.



The majority of the Fall 2011 students at the Roanoke Higher Education Center are part-time, with an average of 8 hours enrolled, but there are a few programs which require full-time enrollment offered at the Center, which may skew the average hours enrolled. Women (68 percent) are more likely to attend the Roanoke Higher Education Center than men (32 percent). The older students (35 years of age and older) are more likely to be married (76 percent) than the younger students (only one third of those younger than 35 are married). Seven percent of the enrollees at the Center in Fall 2011 were veterans, generally those adults older than 35 years of age. The time classes are taken for the current students in Fall 2011 are driven by when classes are offered at the Roanoke Higher Education Center – almost all of the students at the Roanoke Higher Education Center are taking evening classes, with four percent enrolled in a hybrid class, three percent taking day classes, two percent weekend classes, and one percent an online class.

Overall, 48 percent of the current students did not receive any financial aid. For the students who did receive aid, half of the older students (35 and over) have loans to help pay for their education while the younger students (under 35) were more likely to receive financial aid and get grants and loans to assist in paying. Only a very few older adults reported receiving tuition reimbursement to assist in paying for their education.

After examining the profiles of the current students attending classes at the Roanoke Higher Education Center in Fall 2011, the following issues should be addressed by the Roanoke Higher Education Center and its educational partners:

- **Additional data is needed to define the impact of the partners' online degree programs on attendance at the Roanoke Higher Education Center.** The only data provided by the educational partners was for the students physically taking classes at the Roanoke Higher Education Center. Data was not provided for the students living in the Roanoke MSA and taking classes online at a partner institution. Based on anecdotal information, there are students living in the Roanoke

region taking online classes through the educational partners at the Roanoke Higher Education Center who are using the services offered at the Roanoke Higher Education Center. For example, students are using the library and computer labs at the Center and are interacting with Center staff, but are not enrolled in the classes being offered at the Center. With an increase in the enrollment in online classes, there may be a need for the Roanoke Higher Education Center to offer more student support services to support the online enrollment, like tutoring, career counseling, computer access, and library services.

However, to assess whether this is a trend in enrollments and the impact on enrollments at the Center, data is needed. When the educational partners were asked to provide information on online students enrolling from the Roanoke MSA, the data was not included. Partner cooperation will be needed to conduct this analysis and to develop a measure of the total market taking classes at the partners – both at the Center and online – and assess the impact of online programming.

- **Develop a joint marketing campaign with the educational partners to market to students (or alumni) who have been enrolled with the partners in the past who are residing in the Roanoke MSA.** Examining the previous enrollment status of the students enrolled Fall 2011 at the Roanoke Higher Education Center, it was clear that the students were likely to have attended the educational partners in the past – either for classes or a degree. The educational partners have extensive databases containing their enrollees in the past three to five years, as well as alumni information for those who have graduated. Develop a three-tiered approach for marketing to these previous enrollees based on current degree attainment:
 - **Associate Degree enrollees.** Work with Virginia Western Community College to identify its current and past enrollees (within the last three to five years) that have completed more than 45 hours but have not graduated from the College. Utilize direct mail and variable printing to invite these students to complete their degree at Virginia Western Community College and easily move to a bachelor's degree at the conveniently located Roanoke Higher Education Center. Focus on the degree areas in which the students have an interest and provide the degree areas available at the Center. Use the data focusing on the increased annual earning for graduates with associate and bachelor's degrees.
 - **Bachelor's Programming.** Working with the educational partners, identify the student populations who have attended the Roanoke Higher Education Center in the last three to five years, but did not complete a bachelor's degree and are likely still living in the area. For example, this may be the adults who started a bachelor's degree cohort program and dropped out prior to completion. Utilize a direct mail campaign to invite the students to return and complete their programming at the Roanoke Higher Education Center. Again, use the annual salary evidence to market the programming.
 - **Master's Programming.** Working with the educational partners, identify the alumni with a bachelor's degree who are residing in the Roanoke MSA and create a direct marketing campaign to invite them to explore the options for completing a Master's degree at the Roanoke Higher Education Center.
- **Explore the addition of 2+2 and 3+1 programs to be offered at the Roanoke Higher Education Center and market to the students under age 25 in the Roanoke MSA.** There is market potential for the Roanoke Higher Education Center with the students younger than 25 years of age who are place bound in the Roanoke MSA and the adults in the market who have some college and have not completed a bachelor's degree. The 2010 Census information indicates that almost 45,000 adults, 25 years of age or older, in the Roanoke MSA have completed some college but not earned a degree. Roanoke Higher Education Center should work with the partners and explore additional partners that will offer defined 2+2 programming and 3+1 programming at the Roanoke Higher Education Center. Partner colleges would only offer the junior and senior components (2+2

model) of the most popular degree areas, and for some degree programs, only the senior year of programming (3+1 model). The Roanoke Higher Education Center would create events for adults who have some college to come into the Center and have an evaluation of their current college transcripts. Center personnel would then develop a personalized degree plan for the adults – advising classes needed for completion locally at Virginia Western Community College to move into the 2+2 or 3+1 programming at the Center.

For the younger adults, there may be an opportunity for the educational partners to offer additional day classes under the 2+2 or 3+1 models, since this market is more likely to attend full-time, have financial aid, and work in the evenings. This would be an expansion of the total market for the Center and not simply trading class times.

Awareness Of Roanoke Higher Education Center

The Roanoke Higher Education Center has done a very good job of creating awareness of the Center among the adults interested in education and the employers in the Roanoke MSA. In the survey of adults interested in education, 87 percent are aware of the Roanoke Higher Education Center. Overall, 26 percent of the adults have heard of the Roanoke Higher Education Center, 34 percent know a little bit about it, 12 percent know a lot about it, and 15 percent know it very well, while only 13 percent have never heard of it. And more than three-fourths of the adults correctly identified the location of the Roanoke Higher Education Center as Downtown Roanoke (108 North Jefferson Street). The majority of the employers in the Roanoke MSA are also familiar with the Roanoke Higher Education Center. While 16 percent of the employers have never heard of the Roanoke Higher Education Center, two-thirds of the employers have heard of it or know a little bit about it, and 19 percent know a lot or know it very well. A majority of the employers (more than two-thirds) also correctly identified the location of the Roanoke Higher Education Center.

But the adults and the employers are less familiar with the partners at the Roanoke Higher Education Center and have a more difficult time naming the educational partners at the Roanoke Higher Education Center. Twenty-one percent of the adults interested in pursuing education and training could not recall the names of any of the educational institutions offering programming at the Center, nor could 58 percent of the employers. The adults were most likely to identify the local colleges and universities as educational partners at the Roanoke Higher Education Center. They were most familiar with Virginia Tech (56 percent), Radford University (56 percent), the University of Virginia (39 percent), and Virginia Western Community College (32 percent), and least familiar with Mary Baldwin College (25 percent), Old Dominion University (22 percent), Averett University (20 percent), Hollins University (16 percent), James Madison University (13 percent), Roanoke College (11 percent), Bluefield College (10 percent), and Western Virginia Workforce Board (5 percent). The employers were most likely to list Radford University (54 percent) as a college at the Roanoke Higher Education Center, as well as Virginia Tech (53 percent), Virginia Western Community College (34 percent), the University of Virginia (35 percent), Mary Baldwin College (26 percent), and Old Dominion University (20 percent). The employers surveyed were less familiar with the other partners. Less than 20 percent mentioned Averett University, Bluefield College, Hollins University, James Madison University, Roanoke College, and the Western Virginia Workforce Board as partners at the Roanoke Higher Education Center.

Although the adults and the employers have an awareness of the Roanoke Higher Education Center, their recall of media in the last year utilized by the Roanoke Higher Education Center is low. Only 40 percent of the adults and 30 percent of the employers recall seeing or hearing anything about the Roanoke Higher Education Center in the last year in the media. Newspaper ads (41 percent) and television (40 percent) were more successful in reaching the adult market segments, more successful than brochures (38 percent), newspaper stuffers (28 percent), radio ads (28 percent), material mailed to the home (26 percent), e-mails (17 percent), web ads (17 percent), and billboards (15 percent). Newspaper ads (36 percent) and radio and television (28 percent) were also the most successful in reaching the employers in the market. Less than one-fourth of the employers recalled seeing or hearing anything about the Center in any of the other media listed,

but employers did mention hearing a lot about the Center through the personnel organization (SHRM). The major issue with recall of media is that one media is not predominant in reaching the adults and employers in the Roanoke MSA and a multi-media strategy must be employed to continue to reach the potential markets.

In developing a successful marketing strategy for the Roanoke Higher Education Center and its partners, the Center has to understand where adults go to get information about colleges they are interested in attending. Almost all of the adults (93 percent) will go to a college's web site to gain information about programs offered when searching for college information, and the adults are most likely to make the Roanoke Higher Education Center web site their first stop when trying to find college information for the Roanoke region. Adults will also use individual program brochures (83 percent), college brochures (80 percent), will call for information (78 percent), use the class schedule (74 percent), and review the college catalog (71 percent). The employers were asked how they would like to be contacted with information about the Roanoke Higher Education Center and the majority preferred e-mail.

After examining the current marketing information for the Roanoke Higher Education Center, the partners' information, the Roanoke Higher Education Center web site, the partners' web sites, and the awareness of the adults and employers in the Roanoke MSA, the following issues should be addressed by the Roanoke Higher Education Center and its educational partners:

- **Develop a one-year marketing plan detailing all marketing activities for the Roanoke Higher Education Center to be conducted and the expectations for the partners in assisting with the plan.** Past efforts at collaborative marketing between the Roanoke Higher Education Center and the partners have not produced the results needed for impacting the market. A marketing committee has been established and then after a few meetings, the partners no longer attend meetings and do not actively participate in the events and activities planned. To increase the collaborative efforts, the Roanoke Higher Education Center staff needs to develop a one-year plan for marketing efforts outlining the events to be undertaken, advertising proposed, and communication strategies. The goals for the marketing plan will be to (1) sustain the awareness of the Roanoke Higher Education Center, (2) increase the awareness of the programming and partners at the Center, and (3) increase enrollments in the partners' programs. A sampling of the additional types of activities which should be considered in the marketing plan include:
 - Monthly e-blasts (newsletter) featuring a program area and the partners offering the program at the Roanoke Higher Education Center
 - Increase the number of open houses and program information nights, corresponding to the programs highlighted monthly, and utilize media to support the awareness of the open houses
 - Direct mail campaigns as earlier discussed in collaboration with the partners to market to their current students and alumni
 - Post the Roanoke Higher Education Center Facebook link on all communication materials and invite students to like the Facebook page; develop a campaign to engage students on the Center's Facebook page; post more frequently
 - Purchase mailing lists of adults who have some education and no college degree and develop a direct mail campaign to promote the bachelor's programming at the Center
 - Purchase mailing lists of adults with bachelor's degrees and develop a direct mail campaign to promote the Master's degrees offered at the Center

For all of the marketing efforts, a landing page should be developed on the web page which would drive the potential students to the site to gain more information and to be able to measure the success of each of the marketing activities. By measuring the success, the Center will be able to prioritize each

activity with respect to its ROMI (return on marketing investment) and more fully extend a limited budget.

- **Develop a list serve for employers and for adults interested in pursuing education to capture potential inquiries on the Roanoke Higher Education Center’s web site and a blog to answer questions.** A major issue for educational institutions in today’s market is capturing those individuals who are interested in education and having a conversation with them prior to an application. Many educational institutions never know that potential students are shopping the college on the web site unless the potential student fills out an application. The same is true for the Roanoke Higher Education Center – many people may browse the site, but there is currently no way to capture those interested individuals at this time for follow-up. The Center should create buttons to “Get E-Updates” for adults and employers. The individual on the web site would click the button, which would lead them to a page that would allow them to indicate how they would like to be contacted – for example, e-mail, text, Twitter feed, etc. – and even what information they would like provided to them on a regular basis. A database is being built of potential students for the programming at the Center as well as employers and others who may want to rent space. The Center would send out weekly or monthly e-blasts that would include invitations to open houses, updates on new programs, etc. Each e-blast would also be repeated on the Facebook page for the Center and all e-communication would encourage conversation about programming and current students’ experiences at the Center. The partners should also communicate to each student at the Center to sign up for the Center’s e-updates.

In addition, the Roanoke Higher Education Center should develop an “Ask Us” blog on the Center’s web site to stimulate questions about the Center, its programming, scheduling, etc. While people still call the Center for information, there should also be an electronic, interactive site for questions from potential students and employers.

- **Update the Roanoke Higher Education Center’s web site and provide more detailed program information for each program.** Adults and employers generally “shop” or search for programs – not necessarily colleges. The current Roanoke Higher Education Center web site does not provide easy-to-see program information for the degrees offered. After clicking on the “Program Offerings” on the home page of the Center’s web site, it moves to a page that first lists the partners with links to the home page of the partners, and then a list of degrees offered at the Center with the partners offering the degrees. A visitor would assume that if the college next to the degree is clicked on, the link would lead to information for that specific degree at that college. However, for several of the degree links clicked, the visitor landed on a general page about the College or a page about the Roanoke Higher Education Center which then loops back to the Center’s web site and still no program information is available. In some cases, the information about the degree offered at the Center is actually contradicted on the individual partner’s web site. The best scenario found when checking links from the program information is “Page Not Found.” The bottom line is that the program offerings page is actually more of a hindrance than a help at this time and needs to be fixed immediately.

The partner colleges need to provide detailed program information to the Roanoke Higher Education Center – current information – about what the program is, the degrees offered, curriculum, course descriptions, and the contact at the Center for the degree. In addition, it would be extremely useful for the partners to lay out a schedule of when the classes will be offered and in what formats, so that a schedule can be developed by the potential students and they would understand the time commitment for completion. The partner colleges need to update this information as it changes. In the past, changes have been made in degree programs and the Center has not been updated on the changes.

Current College Attendance

It is important for Roanoke Higher Education Center to understand whether adults in the service area are currently attending college, what programs are being taken, and what colleges are being attended. Based on the results of the adult survey, 24 percent of the adults interested in education or training in the next year are currently attending an educational institution – 30 percent of those currently attending are taking classes and 70 percent are working on a degree.

For the students who are taking classes, only 12 percent of the adults currently attending classes are taking classes from partners at the Roanoke Higher Education Center – six percent are attending the University of Virginia, three percent Hollins University, and three percent Radford University. Thirty-six percent of the adults currently taking classes are attending Virginia Western Community College at their main campus, not at the Roanoke Higher Education Center. But almost half of the adults currently enrolled in college, 48 percent, are enrolled at colleges other than the partners at the Roanoke Higher Education Center, and these colleges are located across the state and include two-year and four-year colleges, specifically Liberty University (25 percent), the University of Phoenix, National College, ITT, Jefferson College of Health Sciences, Loyola Marymount, New River Community College, Northern Virginia Community College, and Patrick Henry Community College. The majority of the adults attending colleges outside of the area are taking online classes.

Seventy percent of the adults currently enrolled in college are seeking degrees, and they are most likely working on bachelor's and Master's degrees. Nursing is a major degree area of interest to the adults currently attending college – 18 percent are enrolled in some aspect of nursing (CNA, LPN, RN, bachelor's). Enrollments in health care programs account for another 10 percent of the enrollments with the current college attendees in the Roanoke region enrolling in health care, health care management, health science, medical billing and coding, occupational therapy, physical therapy assistant, public health, radiography, and speech and language pathology. Education is also popular with the current college attendees with 15 percent of the college enrollees seeking degrees in education, specifically education (MA, reading, leadership, and psychology), elementary education, teaching the deaf, and MFA in children's literature. Business is also a key area in which the current college attendees are seeking degrees – business administration, management, and accounting.

Sixty percent of the adults who are currently working on a degree attend local institutions: 28 percent attend Virginia Western Community College, 10 percent Radford University, eight percent Hollins University, six percent Virginia Tech, four percent Averett University, and two percent attend Old Dominion University and the University of Virginia, respectively. Forty-five percent of the adults currently working on a degree are also attending colleges other than the education partners, including Liberty University, Jefferson College of Health Sciences, Capella University, and Ferrum College. It is likely that the majority of the adults seeking a degree at another college are taking online classes – 42 percent of the current college attendees seeking degrees are taking online classes, 51 percent are taking classes on-site, and 23 percent are enrolled in blended courses (online and on-site).

The employers are also in an excellent position to provide insight into current college attendance in the market since many of the employers in the market offer tuition reimbursement to their employees. Fifty-nine percent of the employers surveyed reported they have employees currently attending colleges in the area. Fifty-one percent of the employers noted they have employees attending Virginia Western Community College, 17 percent have employees at Virginia Tech, 16 percent have employees at Radford University, and 12 percent have employees attending Roanoke College. Less than 10 percent of the employers have employees attending Averett University, Bluefield College, Hollins University, Mary Baldwin College, Old Dominion University, and the University of Virginia. Fifty-three percent of the employers reported that they have employees attending 15 colleges other than the partners at the Roanoke Higher Education Center, with the predominant other colleges including Liberty University, Ferrum College, and Jefferson College of Health Sciences. Fifty-three percent of the employers in the Roanoke region reported their employees are taking online courses, from both partner colleges and other colleges in the state and country.

After examining the results of the current educational attendance from the adult and employer surveys, the following issues should be addressed by the Roanoke Higher Education Center and its educational partners:

- **Re-evaluate the mix of programs and delivery methods for the programs offered by the partners at the Roanoke Higher Education Center.** There are two issues uncovered after examining the current attendance patterns for the adults in the Roanoke MSA and supported by the information provided by the employers: (1) adults are choosing online programming out of the area when a program is not available at the Roanoke Higher Education Center, and (2) adults are bypassing the programming offered at the Center in favor of hybrid and online programs at other colleges outside of the area. For half of the bachelor's degrees and Master's degrees in which the adults are currently enrolled, the programs are not currently available at the Roanoke Higher Education Center but are available through online and hybrid delivery programs at colleges like Liberty University. In the next section of this report, the program needs will be extrapolated from the survey results and a list of new programs for the Center will be presented.

The other major issue that the Center and its partners will have to address is the apparent bypassing of the partners for comparable programs at other colleges in the state and out-of-the-state by adults in the Roanoke MSA. Examining the programming delivery, it is evident that online programming is making in-roads in the enrollments at the Roanoke Higher Education Center and the programming of its partners. Many of the adults bypassing the current programming are looking for convenience in delivery, and they are taking online programming and hybrid programming rather than attending on-site programming. The partner colleges need to explore new delivery methods to make the seat time less for their current programs and expand the online delivery of programming.

Defining Credit Market Potential

People make decisions to attend college based on many key variables – some the colleges can control, such as the programs offered and the services available, and many that the colleges cannot control, such as the person's finances and his or her own faith in himself or herself or the time to do it. The major barrier reported by 55 percent of the adults in the Roanoke MSA to attending college is the availability of courses for bachelor's and Master's degrees locally. Fifty-five percent agreed with the statement "If I could take courses for a bachelor's and Master's in the area, I would enroll." Although Roanoke Higher Education Center has done a good job in creating awareness of the Center, the market still does not believe the programming needed for them is available locally. Slightly more than one-third of the adults note that cost or affordability of education is a barrier for them and 33 percent noted they did not have the time to attend.

The adults were asked if they had any interest in taking college courses or seeking or finishing a college degree in the next year. Forty percent of the adults surveyed are interested in enrolling in a college class and the primary provider would be Virginia Western Community College (49 percent). Less than five percent of the adults interested in taking a college class listed a partner at the Roanoke Higher Education Center as the preferred provider. While the class list ran the gamut of programming, key areas of interest for college classes included education (math, music, physical education, recertification for teachers, secondary, special education, history, technology), business (management, administration, economic development, finance, international business), nursing, accounting, and computers (programming and technology). Although some of this programming can be offered by the partners in the Roanoke Higher Education Center, the majority plan to attend the local community college.

The major area of emphasis for the Roanoke Higher Education Center and its partners is degree completion – especially bachelor's and Master's degrees – and support for the need for degrees is seen among both the employers and the adults in the Roanoke MSA. Twenty-seven percent of the employers reported a need for their employees to seek degrees, especially bachelor's degrees (64 percent), as well as Master's degrees (45 percent), associate degrees (44 percent), and doctoral degrees (12 percent). Employers in the Roanoke MSA understand the value of education for their employees. The key program areas cited as needed for employees

to seek bachelor's degrees include business, management, nursing, accounting, engineering, finance, and social services. Master's degrees are needed in education, engineering, business, criminal justice, library science, management, and social work.

The employers were also asked for what occupations they would be hiring in the next two years and the minimum education required for those positions. Unfortunately, the majority of the positions to be hired, those with high turnover, will only require minimal education – generally a high school diploma/ GED (43 percent) or no education (19 percent). Twenty-three percent of the jobs to be filled will require a technical or career certificate, five percent will require an associate degree, eight percent a bachelor's degree, and less than one percent will require a Master's degree or a professional or doctoral degree. Without demand for bachelor's degrees in jobs hired, it will be more difficult for the employees to see the need for increasing their educational levels.

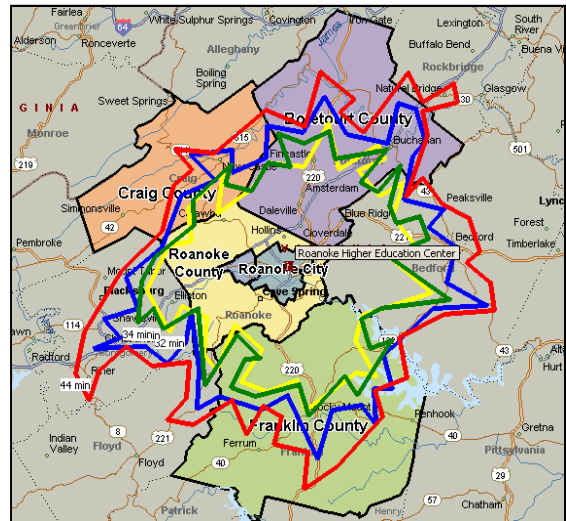
In the adult survey, 40 percent of the adults were interested in seeking a college degree – 46 percent are interested in a bachelor's degree and 28 percent a Master's degree. The educational partners that the adults interested in pursuing a bachelor's degree would be likely to attend include Radford University (18 percent), Virginia Tech (7 percent), and Virginia Western Community College (22 percent). Forty percent of the adults are looking to enroll in a bachelor's degree program at colleges that are not partners in Roanoke Higher Education Center, specifically Liberty University, Jefferson College of Health Sciences, Ferrum College, and University of Phoenix. The program areas of interest for bachelor's degrees include nursing, business, education, accounting, criminal justice, engineering, management, psychology, and physical therapy. Radford University is the partner of choice for a Master's degree for 20 percent of the adults interested in seeking a Master's degree. Nine percent would attend Virginia Tech and seven percent Hollins University and the University of Virginia, respectively. Forty-four percent of the adults seeking a Master's degree would not choose a partner for their program; instead they would choose Liberty University or another college out of the area. The Master's programs of interest to the adults include nursing, education, social work, business, counseling, and history.

What are the characteristics of the adults who are interested in seeking a college degree and how do they want the programming offered? Fifty-seven percent of the adults would enroll part-time, and more than half will work full-time while seeking the degree. Many of the adults will have to continue to work since 59 percent noted they will have to work and pay for their education as they go, while 70 percent will apply for financial aid, 72 percent will seek scholarships, and 58 percent will seek employer assistance. Only the larger employers will support their employees' educational attainment. Sixty-six percent of the employers reported they would allow employees to flex their schedules to take college classes, and 62 percent would actually offer tuition assistance to their employees, on average \$2,350 per year to pay for classes. Other than that, employers are not willing to provide monetary assistance – only 35 percent will assist with books and 15 percent will provide paid release time to take classes. Ten percent of the larger employers do have or have had college classes on-site at their place of business.

When employers were asked if they would support any partnerships to bring additional education opportunities to their employees, only one-third of the larger employers were supportive. Thirty-two percent of the larger employers would allow for college courses to be taught at their place of business, but it is unlikely the minimums for class size could be met at many of the employers – they are simply not large enough. Thirty-one percent of the employers would consider partnering with the college on basic research, 29 percent would fund scholarships for employees, and 29 percent would pay for employees to earn post-bachelor's degrees. Only 16 percent of the employers would guarantee students for college classes in order to receive a tuition discount.

While the majority of the degree seekers still plan to enroll in the evening (68 percent), 45 percent would attend on the weekends (predominantly on Saturday), and 35 percent would attend classes during the day (those likely to attend classes full-time). What adults are really looking for are alternative delivery options for programming – they want less seat time and more flexible delivery to meet their busy schedules. While two-thirds of the adults still prefer face-to-face delivery, 71 percent would prefer to enroll in degree programs that meet once monthly, 68 percent prefer hybrid courses, 68 percent prefer online courses, 67 percent would like accelerated courses (lasting 6 to 8 weeks), 66 percent prefer late start classes, 59 percent prefer accelerated degree programs, and 59 percent would prefer to attend programs offered the same evening each week for one year. Only 20 percent of the adults prefer a program offered on Friday, Saturday, and Sunday.

The adults were also asked their preferences for format of programming and only 26 percent preferred a completely online program, and only 35 percent of those students noted the availability of local student service programming for online students was very important or important to them. Thirty-two percent of the adults would prefer a program taught near their home by faculty. The adults are willing to drive 26 miles one way to take classes, or spend 36 minutes traveling to class (see map at right). The colored rings represent the distance preferred by the adult market segments, basically encompassing Roanoke County and Roanoke City. Forty-two percent of the adults prefer a blended format for class delivery, consisting of class meetings and online work. The blended format is becoming much more prevalent for course delivery and provides the best of both face-to-face delivery and convenience.



After examining the results from the educational preferences for the adults interested in education and the employers’ demand for education and training, the following issues should be addressed by the Roanoke Higher Education Center and its educational partners:

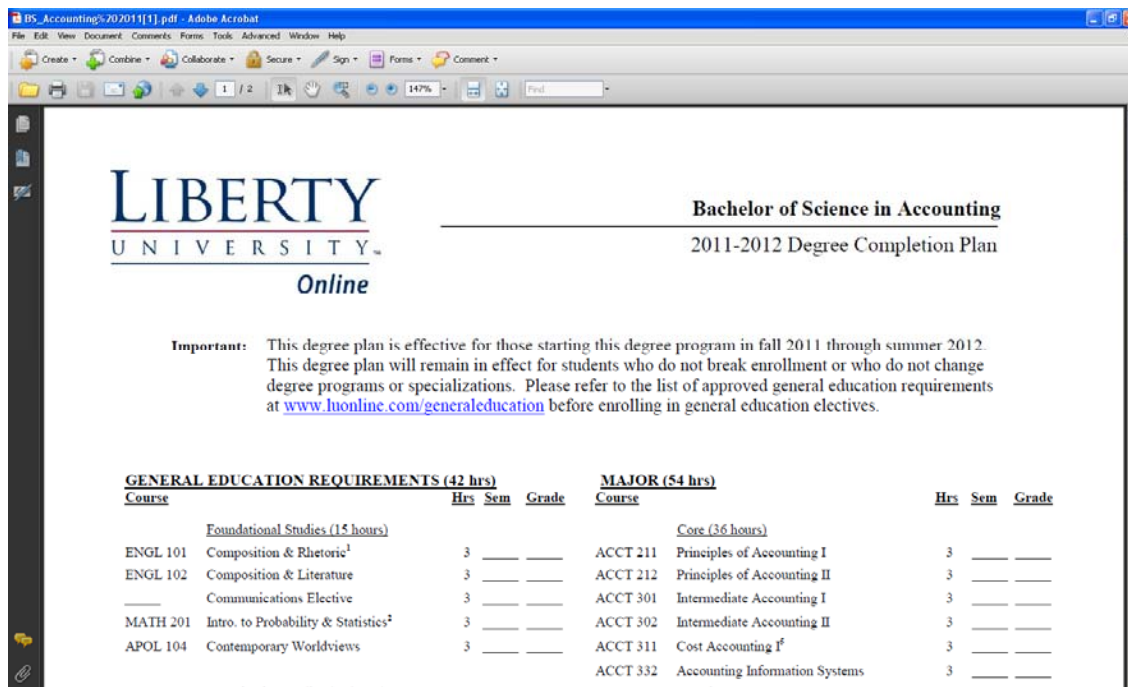
- Explore providing alternative delivery formats for the current degree programs offered at the Roanoke Higher Education Center by the partners.** The same issue was seen with the adults who are interested in seeking a degree as those who are currently attending college – the adults are considering bypassing the partners at the Roanoke Higher Education Center and attending another college. The bachelor’s degrees that are offered at the Roanoke Higher Education Center by the educational partners that are being taken at other colleges or are being considered at other colleges include: business, computer science, criminal justice, English, international relations, marketing communications, nursing, philosophy, political science, psychology, religion, social work, and sociology. Although adults are likely to enroll in face-to-face programming, the majority of the adults are looking for programming that requires less seat time and is more flexible for the adults to work into their busy lives. Many of the adults preferred a hybrid delivery – a combination of face-to-face delivery with online programming.

Since Liberty University was mentioned so frequently by adults and employers as a preferred provider of education, its web site was examined for delivery methods. According to Liberty’s web site, “Liberty University offers intensive on-campus for weekend or week, blended, 8-week online, and accelerated classes. We offer more than 45 online degree programs and 100 concentrations in the areas the market demands most – business, education, nursing, psychology, counseling, and religion – all taught in a flexible and convenient online format...”

Roanoke Higher Education Center and the partners need to evaluate the current delivery methods of the most popular programs at the Center and explore alternative delivery methods for the

programming – specifically hybrid programming and accelerated programming for the degrees offered.

- **Develop better scheduling information about the current bachelor’s and Master’s degrees offered at the Roanoke Higher Education Center and provide easy-to-use degree plans for each program outlining completion for both part-time and full-time students.** Adults need to understand how long degree completion will take, especially if they are unable to attend full-time and will have to commit to a part-time degree schedule. The partners should make available to the Roanoke Higher Education Center to place on its web site degree sheets outlining the courses needed for degree completion and the proposed schedule for full-time and part-time enrollees. An example of a degree sheet from Liberty University, found within two clicks of the home page, for the Accounting Bachelor of Science program follows.



- **Explore with the current partners the feasibility of offering new programs at the Roanoke Higher Education Center based on the programming being taken at colleges outside of the area and not offered locally.** Throughout the research results, it was clear that the adults in the Roanoke MSA are enrolling in programming being offered outside the area that is not available for local enrollment. For example, the bachelor’s degrees offered at other colleges and not at the Roanoke Higher Education Center that are of interest to the adults in the market include: accounting, art, biochemistry, biology, biomedical, chemistry, cinematic arts, communication arts, economics, electrical engineering, entrepreneurship, environmental studies, fashion, graphic design, health and exercise science, health science, healthcare management, interdisciplinary studies, mathematics, physics, pre-professional science, social studies, Spanish, and theater arts. A common theme threaded through these programs is the dependence on STEM (science, technology, engineering, and math). Due to the need for labs with STEM programming, the Roanoke Higher Education Center may be sitting in a unique position to add STEM programming using current partners. With the reliance on labs and hands-on work, increased STEM offerings may be an opportunity for the Roanoke Higher Education Center.

A matrix has been developed that outlines the proposed new programming and potential enrollments based on the results of the market assessment. This matrix has been included as an addendum to this executive summary. The partners and the Roanoke Higher Education Center should examine this matrix and evaluate the feasibility of providing the new programming at the Roanoke Higher

Education Center. For the partners, this would be an opportunity to expand their current enrollments. For the programs that the partners may not be able to provide, Roanoke Higher Education Center should contact other educational institutions to explore adding partners to the Center. The degrees to be considered for inclusion at the Roanoke Higher Education Center include:

- **Doctoral:** Education, Educational Leadership, Clinical Physical Therapy, Art History, Health Care Administration, Nursing, and Philosophy
- **Master's:** Nursing, Counseling, Health And Allied Health, Humanities, Business, Education Leadership, Public Administration, Social Work, Teaching (K-12), Accounting, Counselor Education, Creative Writing (MFA), Curriculum & Instruction, Educational Technology, Library Science/ Info Science, Reading/ Reading Specialist, Social Science, Aerospace Engineering (online), Biomedical Engineering, Business Management, Children's Literature (MA/MFA), Computer Programming, Educational Psychology, Environmental Sciences & Engineering (online), Fine Arts, Genetic Engineering, Health Administration, History, Human Resources, Instructional Technology, Justice And Legal Studies, Law, Leadership Studies, Liberal Studies, Material Science & Engineering, Math Education (online), Mathematical Sciences, Medical Simulations, Occupational Therapy, Political Science, Public Health, and Speech and Language Therapy Pathology
- **Bachelor's:** Health And Allied Health, Behavioral Science, Management & Leadership (online), Computer Science, Criminal Justice, Health Care Administration, Information Systems, Accounting, Biology, Business for a Sustainable Future, Engineering, Interdisciplinary Studies w/ PK-6 Teacher Licensure, Marketing Communication, Physical Therapy, Political Science, Religion, Social Work, Sociology, Teacher Licensure (K-6, 6-8, 6-12), American Studies, Art, Art Management, Biotech and Business, Business Education, Chemistry, Computer Information Systems, Education, Electrical Engineering, Engineering Management, English, Fire Science, Forensic Science, General Studies, Government, Health Sciences, Healthcare Management, History, Liberal Arts, Mechanical Engineering, Mental Health Counseling, Missionary Studies, Nutrition, Public And Urban Affairs, Real Estate, Security and Safety, Social Studies, and Video Game Art And Design
- **Evaluate the feasibility of adding a full-time staff member to the Roanoke Higher Education Center to market the programming to local employers with tuition reimbursement.** The larger companies in the Roanoke MSA were the most likely to provide tuition reimbursement for their employees and are the most likely to provide classes on-site for their employees. However, companies simply do not think of the Center or the partner colleges and have little time, although good intentions, of following up on the possibility of partnering with the Center or its partners. The Center should add a staff member whose primary responsibility would be to work with employers to explore opportunities for partnerships with the current members of the Roanoke Higher Education Center in delivering credit education, as well as promoting the degree programs offered by the partners to the employees of the companies. Many of the employers noted that even though they offer tuition reimbursement to employees, many were not taking advantage of the reimbursement. The responsibility of the new staff person would be to market the programming to employers and their employees. This position also allows for ongoing marketing research – the staff person is constantly meeting with employers to determine needs and that information can be passed back to the partners for new programming development. The staff member can also work to set up cohorts at companies for degree delivery.

Defining Noncredit Market Potential

The adults in the market were not only asked if they were interested in credit education, but they were also asked if they had any interest in taking a noncredit class to improve current job skills, assist in their current job, or to help get another job. This question defined the noncredit market segment. Overall, 55 percent of the adults surveyed noted an interest in taking a noncredit class to improve current job skills, assist in their current job, or help to get another job. The preferred provider for noncredit classes in the Roanoke MSA is Virginia Western Community College and few of the adults interested in noncredit classes preferred the partners at the Roanoke Higher Education Center. However, more than half of the adults interested in noncredit education have completed a bachelor's degree or higher, making it a potential market for post-bachelor's programming. The topics for the noncredit programming are as varied as the individuals, but tend to mirror the programming topics for the market interested in credit classes. The adults who are interested in noncredit programming prefer one-day classes or less or two-day classes.

Not only are the adults in the market interested in noncredit programming, so are the employers. Half of the employers in the Roanoke MSA plan to provide training to their employees in the next year. While the majority will conduct the training in-house, 45 percent of the employers with 50 or more employees will contract out some of their training, as will 32 percent of the employers with less than 50 employees. The majority of the employers tend to use associations for delivery of their training programs that are contracted out. Almost two-thirds of the employers prefer to have their training programs offered at their site of business today, and not go off-site. The delivery methods for training programs have changed over the last few years – while 93 percent still provide hands-on training and 73 percent use seminars, 68 percent are now using online delivery and 60 percent are using Webinars to provide training to their employees. The employers today are more likely to use online delivery methods for training of their employees.

Both employers and adults expressed a need for CEUs in the Roanoke MSA. Fifty-five percent of the employers require CEUs for their employees, especially in health care and education. The larger employers are more likely to support noncredit education for their employees – 68 percent will pay for CEUs for their employees, 68 percent pay for travel to attend workshops or seminars, and 41 percent will pay for noncredit classes. Thirty-nine percent of the adults are required to earn CEUs for their job or to keep a license, and the predominant fields for the CEUs are health care, education, and technology. Eleven percent of the adults are likely to attend Virginia Western Community College and there are numerous other colleges listed for CEUs – local colleges as well as those out of the area.

After examining the results from surveys of the adults and employers about noncredit programming, the following issues should be addressed by the Roanoke Higher Education Center and its educational partners:

- **There is a market opportunity for the Roanoke Higher Education Center and its partners to offer noncredit programming aimed at the adults with a bachelor's degree.** The market for the Roanoke Higher Education Center and its partners in noncredit education is in post-bachelor's training programs, specifically certificate programs, noncredit programs, and CEUs. The goal of the noncredit programming at the Roanoke Higher Education Center would be to provide the plethora of programming – from customized courses offered on-site at employers' businesses to prep courses for professional licensure to certificate and degree programs offered at the Roanoke Higher Education Center and online – to provide employers and their employees a competitive advantage. In the past, the Roanoke Higher Education Center has been seen as a "facility" for employers to rent for seminars, workshops, etc. The Roanoke Higher Education Center needs to reposition itself as a broker of programming, not just space.

By utilizing the new staff member for employer visits, the staff member would also be responsible for marketing the noncredit programming at the Center. The Roanoke Higher Education Center staff member would act as a broker for the partners, defining employers' needs for training and noncredit programming, arranging the logistics of the program, negotiating the contract, and working with the partners to deliver the programming. A mutually beneficial fee arrangement may include a facility

and broker fee (a percentage of the total workshop cost) for the Roanoke Higher Education Center and payment for the programming delivery to the partner.



The Division of Continuing Studies at Rutgers is an excellent example of the type of programming suggested for the noncredit programming at the Roanoke Higher Education Center (see screen print above).