



**Report to Belmont Technical College and
Monroe County Commissioners:**

***Measuring the Post-secondary Market Potential of
Monroe County.***

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Executive Summary

The Strategy Team, Ltd. (TST) was hired to perform a postsecondary market potential analysis of Monroe County, Ohio by Belmont Technical College (BTC), the Monroe County Commissioners and the Governor's Office of Appalachia. If market potential justifies it, BTC may consider expansion of post-secondary facilities and programs into Monroe County, perhaps in conjunction with other post-secondary institutions in the area. As of now, its presence is minimal in this County. TST addressed the central issue of market potential by means of a three-step research process.

First, secondary data for Monroe County were reviewed as well as national trends and models for delivering higher education to rural areas. Second, community leaders were interviewed in depth. And third, a county-wide telephone survey was conducted. As a result of this multi-faceted look at the post-secondary market, TST makes the following recommendation:

Recommendation. *Although interest is high, market potential for post-secondary education is weak in Monroe County and apt to grow weaker unless conditions change. BTC, should it decide to lead the effort to establish a post-secondary center, might want to limit its liability by being a partner in the effort, with suggested other partners to include: the County Commissioners; other institutions of higher learning in the area (especially Ohio University Eastern); local high schools; the Broadband Center; the Monroe County Department of Job and Family Services; and local businesses.*

If, based on BTC's financial analysis of market potential, the decision is to proceed with a Monroe County post-secondary center, it is also recommended that government support and/or foundation funds be sought to help with planning and start-up costs.

The remainder of this executive summary briefly discusses critical research results that support this recommendation.

Market estimate. Based on the results of the telephone survey conducted for this project, it is estimated that there would be **about 574 residents of Monroe County over the next three years**, or a range of 494 to 654 potential students expressing interest in post-secondary classes at a local center, perhaps in Woodsfield, should courses of interest be offered, affordable and available at convenient times and a convenient place. Not all of these students would be enrolling at the same time. Note that this figure undoubtedly includes some who now live in Monroe County and attend Belmont Technical College in St. Clairsville.

Some important indicators are positive. Among community leaders and many residents alike in Monroe County, interest in a post-secondary education center is high. From national data as well as local opinion there are many indications that such a center might help turn around the flagging economy, stimulate interest in college in an area where attendance is low and graduation rates from college even lower, even encourage improvements in and funding for the local Kindergarten through 12th grade educational system. Residents also feel that a post-secondary education is a key to success these days. They feel that having a center available in Monroe County would increase interest and access tremendously and help residents secure

good paying jobs. In addition, the number of students from Monroe who attend BTC has slightly but slowly increased in recent years.

Collaborative trends in rural areas are also positive, as many rural communities are addressing similar issues to those in Monroe County. The formation of partnerships between public, private and non-profit sectors is one trend used to address the dual goals of post-secondary education and economic development. Careful planning is essential among all the partners. Foundations have made money available for planning purposes. In one case, a facility and its upkeep has been supplied free of charge by one of the partners, a government entity. Community leaders in Monroe County express willingness to be part of a collaborative effort to support a post-secondary education center in a variety of ways.

Delivery modes are also a plus, as more and more post-secondary education is delivered by various methods in rural areas – online, face-to-face at remote sites, face-to-face in condensed classes at main sites, via videoconferencing or videotaped monitoring and mentoring. Some institutions are using hybrid approaches, mixing those just mentioned as needed. Thus, creativity and technology are helping post-secondary institutions service rural areas better.

Other indicators, however, are negative. First, demographic data for Monroe County show a steady loss of younger people, who are most likely to be the center's students, and an "aging" of the county's remaining residents. The older people are, data and logic indicate, the less likely they are to be students at the center. Second, historically the culture of Monroe County has not placed a high value on post-secondary education. Third, many feel secondary schools in the county do not prepare enough students well for success in college without extensive remedial education. Fourth, household income levels and family situations in Monroe County may make college courses difficult for many to afford and access, even those who identify themselves as potential students.

It is this second set of indicators that is most problematic for Monroe County and the basis for The Strategy Team's hesitation to recommend a post-secondary center in the area. For a center to be successful, extensive planning, assessments of the educational desires of both individuals and businesses in the county, collaboration and marketing would be needed. Is Monroe County up to the challenge?



Report to Belmont Technical College and Monroe County Commissioners:

Measuring the Postsecondary Market Potential of Monroe County

I. Overview

Belmont Technical College (BTC) serves three counties in eastern Ohio – Belmont, Harrison and Monroe. If market potential justifies it, BTC may consider expansion of post-secondary facilities and programs into Monroe County, perhaps in conjunction with other post-secondary institutions in the area. As of now, its presence is minimal in this County.

Monroe County is rural in nature, with a declining population and a declining industry/business base. BTC and other post-secondary institutions offer some classes within the county at existing facilities, but there is no dedicated post-secondary facility, which limits the types of classes and programs that can be offered. The Monroe County Commissioners are interested in more post-secondary offerings within their jurisdiction to boost the number of skilled workers and the county's attractiveness as a locale for business, industry and other services, including tourism.

The primary strategic decision facing BTC and possible post-secondary partners is:

- Should an investment be made in additional post-secondary facilities and classes in Monroe County? If so, what should that facility look like?

Related questions include the following:

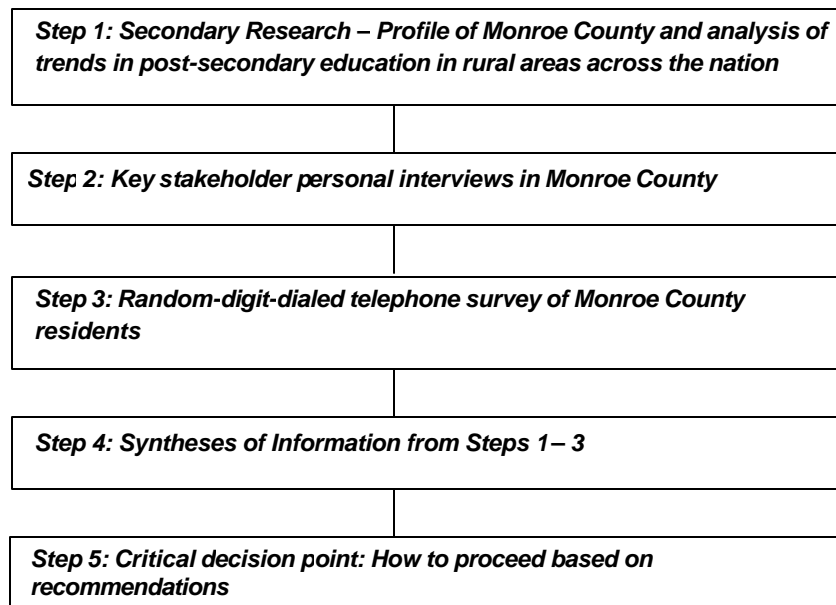
- Would a new facility attract enough students to justify the investment? That is, what is the market potential in Monroe County?
- Based on projections from the U.S. Census, how might that market potential change over the next seven or eight years?
- Assuming the market potential is there, what are the post-secondary educational needs of individuals, businesses and industries in Monroe County? How will those needs change over the next ten years?
- What are Monroe County community and business leaders willing to do to promote BTC classes to help assure the market potential is realized if a new facility is built?
- What evidence is there that expanded post-secondary education in Monroe County will positively affect the economics of the area?

The Strategy Team was hired as the research consultant to answer these critical questions.

II. Research Approach

The research approach utilized for this study was a classic one, beginning with secondary research and proceeding to primary research. The design was robust, meaning that it collected data from many key sources and stakeholders in the process, which in turn yields a multi-faceted picture of issues related to the possible expansion of post-secondary education into Monroe County. This robustness is necessary because a new facility and/or expanded services and classes would be a major investment for the institutions involved, the county and other stakeholders. A schematic of the research approach used is presented in Figure 1.

Figure 1: Schematic of Research Approach



Information and analyses from Steps 1 to 3 will be combined to assess the market potential for post-secondary education in the county. These varying perspectives of market situation and market potential will be brought to bear during the synthesis of information and will be used to make the critical decision: if and how a higher-education presence should be established in Monroe County.

Please note members of The Strategy Team are objective participants in the research process and have no stake in the outcome as to whether or not expanded post-secondary options are created in Monroe County. Our job is to provide the information needed for decision making.

The report now presents the findings of the research, in the same order as conducted and outlined in Figure 1 above.

III. Research Results: Secondary research review

The first half of this review of secondary data and literature is a profile of Monroe County, Ohio, focusing on population trends in the county over the past two centuries, on the demographic statistics of recent county residents compared to those of the State of Ohio, on enrollment trends of Monroe County students at Belmont Technical College (BTC) compared to students from other counties in BTC's service area, and on employment trends and projections in the state. These "hard" data give a snapshot of Monroe County regarding issues that are critical to the decision as to whether a higher-education center in or near Woodsfield in central Monroe County is feasible.

The second section of the review of secondary literature looks at post-secondary educational trends and delivery models in rural areas around the United States. Many rural areas in America experience similar challenges when it comes to making higher education accessible to a relatively small number of students who are distributed over a large geographic area. Many states and educational systems have addressed this issue and some have come up with unique and creative delivery methods. This section addresses the following questions: What are these methods? Are there any trends present that should be noted? Which are relevant to the situation in Monroe County?

Key Research Findings – Secondary research review

- Monroe County's population peaked in 1850 and has been declining since, losing an average of 685 people each decade. This loss is projected to continue into the first three decades of the 21st century.
- Monroe County is aging – from 1990 to 2010, projections indicate there will be fewer young people (especially 24 years of age and under) and more older people (especially over 65 years of age).
- Fewer than 30% of the adult population has taken college courses. Less than 13% of the adult population has completed a degree of any sort.
- Monroe County's contribution to the student mix at Belmont Technical College has been small but slightly increasing over the past five years. For the 2006-2007 academic year, Monroe County residents constitute 7.8% of Belmont Technical College's students.
- Many "best practice" models and initiatives for delivering post-secondary education in rural communities exist. Many of these models and initiatives stress the importance of a collaborative approach to 1) prepare high school students to succeed in higher education and 2) offer courses in ways that make sense in a rural environment.

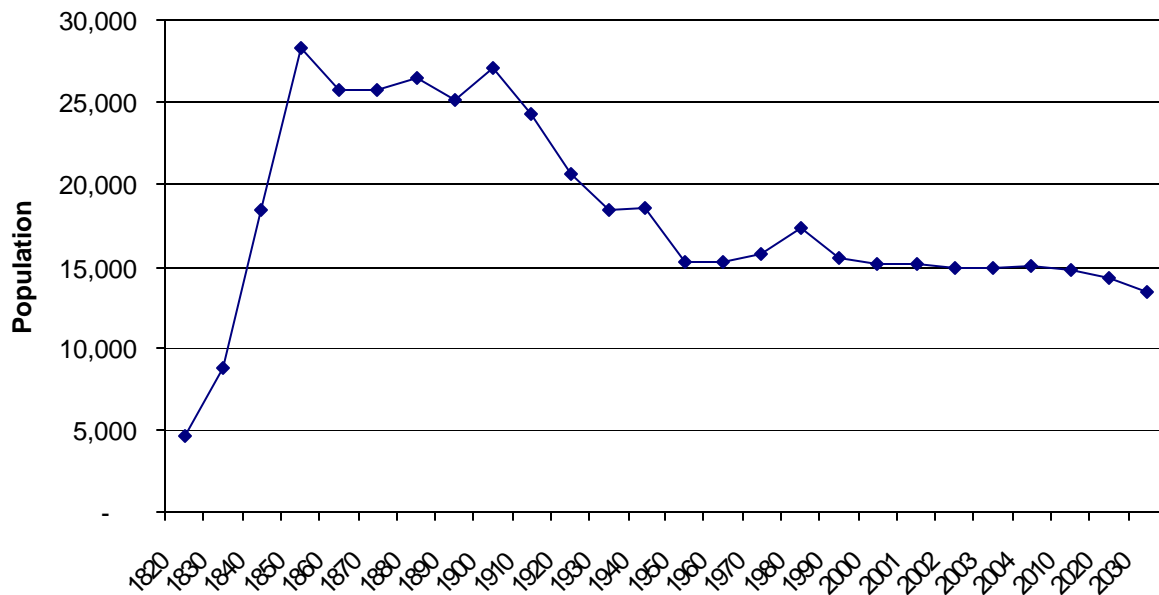
a) Profile of Monroe County:

Population and demographic trends. The availability of free government land drew many early settlers to Monroe County, Ohio, particularly German and Swiss families, who generally arrived by boat on the Ohio River, starting in the late 1800s.¹ As can be seen in Figure 2 (next page), the county population peaked in 1850. With a few minor exceptions, it continued its decline into the 21st century. The county lost an average of 685 people every decade, according

¹ A brief history of Monroe County, given for each of its eighteen townships, is available at the following Internet site: <http://members.aol.com/RYouCuz/monroeco.htm#two> According to that site, the material "was accumulated from the 'History of Monroe County, Ohio,' by H.H. Hardesty & Co., Publishers, dated 1882... Collating and printing of the history was made possible by the efforts of Mr. Harold P. Haley, secretary of the Woodsfield Chamber of Commerce, Woodsfield, OH. Booklet compiled in Woodsfield during the year 1969."

to U.S. census data, from 1920 to the year 2000. Census projections indicate this loss is projected to continue into the first three decades of the 21st century.²

Figure 2: Population of Monroe County, Ohio from 1820 – 2030³



This loss may be accelerating slightly between now and 2010 as younger people continue to migrate out of the county and the remaining population ages, as shown by statistics in Tables 1 and 2. As of now, Monroe County residents are:

- Almost all Caucasian, as only 1.7% of the county population is of minority status;
- Over four years older on average than other Ohioans;
- Pay about half the Ohio income tax as others in Ohio, due to their income being about 75% of the state average;
- Less educated – note that over 71% only have a high-school education or less;
- Almost two times as likely to be unemployed as other Ohioans; and
- Pay less per month for their living expenses, whether they own or rent.

The county is decidedly rural, averaging about 33 people per square mile. Over 220,000 acres of its 292,459 total acres are wooded. The rest is farmland, shrub/scrub areas, open water and open impervious surfaces. The County seat of Monroe is Woodsfield, a village of about 2,500 people. Woodsfield is located near the center of the county and is also its largest town.

² Data from the early 1800s through 2000 are actual census counts. Data from 2001 – 2004 are Census estimates and data beyond 2004 are Census projections.

³ From Ohio County Profiles, prepared by the Office of Strategic Research, Ohio Department of Development, most recent data available in May, 2007.

Table 1: Demographic Comparisons – Ohio vs Monroe County⁴

	Ohio (all counties)	Monroe County
Education		
No high school diploma	17%	21.2%
High school graduate	36.1%	50%
Some college, no degree	19.9%	15%
Associate degree	5.9%	5.4%
Bachelor's degree or higher	21.1%	8.4%
Average expenditure per student	\$8,761	\$8,329
Housing		
Owner occupied housing units	64.2%	67.4%
Renter occupied housing units	28.7%	16.1%
Vacant housing units	7.1%	16.5%
Median year homes built	1962	1963
Median home value	\$103,700	\$62,500
Median monthly owners' cost	\$963	\$653
Median gross rent	\$515	\$352
Finances		
Median household income	\$40,956	\$30,467
Average state tax per individual return	\$1,520.35	\$796.91
Families with income below poverty level	7.8%	11%
Unemployment rate (March, 2007)	5.50%	9.70%
Miscellaneous		
Median age	36.2	40.8
Percent Causasian	84.9%	98.5%
Mean travel time to work	22.9 minutes	30.8 minutes

Table 2: Monroe County Age Trends, 1990 – 2010

	1990 Census estimate		2000 Census estimate		Change (1990 to 2000)		2010 Projection		Projected change (2000 to 2010)	
	#	%	#	%	#	%	#	%	#	%
<15 yrs	3,266	21.1%	2,896	19.1%	-370	-11.3%	2,610	17.6%	-286	-9.9%
15-24 yrs	2,035	13.1%	1,758	11.6%	-277	-13.6%	1,570	10.6%	-188	-10.7%
25-44 yrs	4,360	28.1%	3,937	25.9%	-423	-9.7%	3,700	25.0%	-237	-6.0%
45-64 yrs	3,416	22.0%	4,122	27.2%	706	20.7%	4,210	28.5%	88	2.1%
>=65 yrs	2,420	15.6%	2,467	16.3%	47	1.9%	2,700	18.3%	233	9.4%

⁴ From Ohio County Profiles, prepared by the Office of Strategic Research, Ohio Department of Development, most recent data available in May, 2007.

K-12 education in Monroe County. Monroe County residents labor under additional economic burdens. While the per-pupil expenditure in the county's public schools is only a few hundred dollars per year less than the statewide average, the school district's transportation budget is very large. According to the Superintendent of Schools, school busses in the county travel over 7,000 miles each day delivering pupils to and from schools, as the district is sparsely populated and is the largest in the state, geographically. There has been no new operating levy approved for the Monroe County public schools since 1985.⁵

Travel costs to and from work. Adults also feel the effects of the large geographic size of the county. Workers travel on average 35% longer to and from work each day than do other Ohioans, over a rural system of roads. Their fuel and vehicle upkeep costs, therefore, are substantially higher, while their wages are substantially lower than the Ohio norm. For the high percentage of unemployed in the county, these economic factors likely make searching out a job or training more difficult or unfeasible.

Higher education among Monroe County residents. With regard to higher education, fewer than 30% of the adult population 25 years of age have taken college courses. Fewer than half of those who have attended college (less than 13% of the total County population) complete a degree of any sort – associate's, bachelor's or advanced.

There is little formal post-secondary education available within Monroe County. As of this writing, several classes are offered at the Broadband Center in Woodsfield, the county seat, and/or one of the high schools. BTC is one of the nearest colleges and it lies about 40 miles north of Woodsfield. Monroe County residents attending Belmont Technical College are very similar to the colleges' other students, with two notable exceptions:

- Those from Monroe County travel further to attend classes (34 miles vs. 13 for Belmont County students and 22 miles for Harrison County students);
- Are more likely to be male than students from other counties in BTC's service area (48.4% male for Monroe County vs 41.6% male for Belmont County students and 36.1% male for Harrison County students).

Monroe County's contribution to the student mix at BTC has been increasing slightly but steadily over the past five years, as shown in Table 3. The contribution from other counties that are not in BTC's designated service area (which includes Belmont, Harrison and Monroe) has decreased.⁶

⁵ Personal interview with Mike Staggs, Former Superintendent of the Switzerland of Ohio Local School District.

⁶ Student data were compiled by Rod Leonard at the Office of Institutional Research at Belmont Technical College, May, 2007.

Table 3: County of Residence of BTC Students, 2002-07

	2002-03		2003-04		2004-05		2005-06		2006-07	
	N	%	N	%	N	%	N	%	N	%
Belmont	1266	51.5%	1318	52.3%	1344	52.7%	1355	53.5%	1405	54.0%
Harrison	224	9.1%	234	9.3%	227	8.9%	236	9.3%	220	8.5%
Monroe	130	5.3%	141	5.6%	152	6.0%	157	6.2%	203	7.8%
All others	836	34.0%	826	32.8%	827	32.4%	783	30.9%	772	29.7%
Totals	2456	100%	2519	100%	2550	100%	2531	100%	2600	100%

Meanwhile, through the year 2014, employment growth in Ohio is predicted to be strongest among occupations requiring post-secondary education, especially associate's degrees and weakest in sectors that have traditionally fueled the Monroe County economy – manufacturing, mining, and natural resources, as shown in Figures 3 and 4 (next page).⁷ Between the years 2000 and 2005, jobs in the manufacturing sector in Monroe County decreased 85.6%; mining, 37.1%; and agriculture, forest, fishing and hunting, 28%.⁸ In addition, when regional commuting patterns for work are reviewed, people commuting out of Monroe County exceed those commuting into the county. There is a negative balance of 422 commuting workers, or -10.5%.⁹

Together, these trends paint a discouraging picture of employment prospects in Monroe County through the foreseeable future.

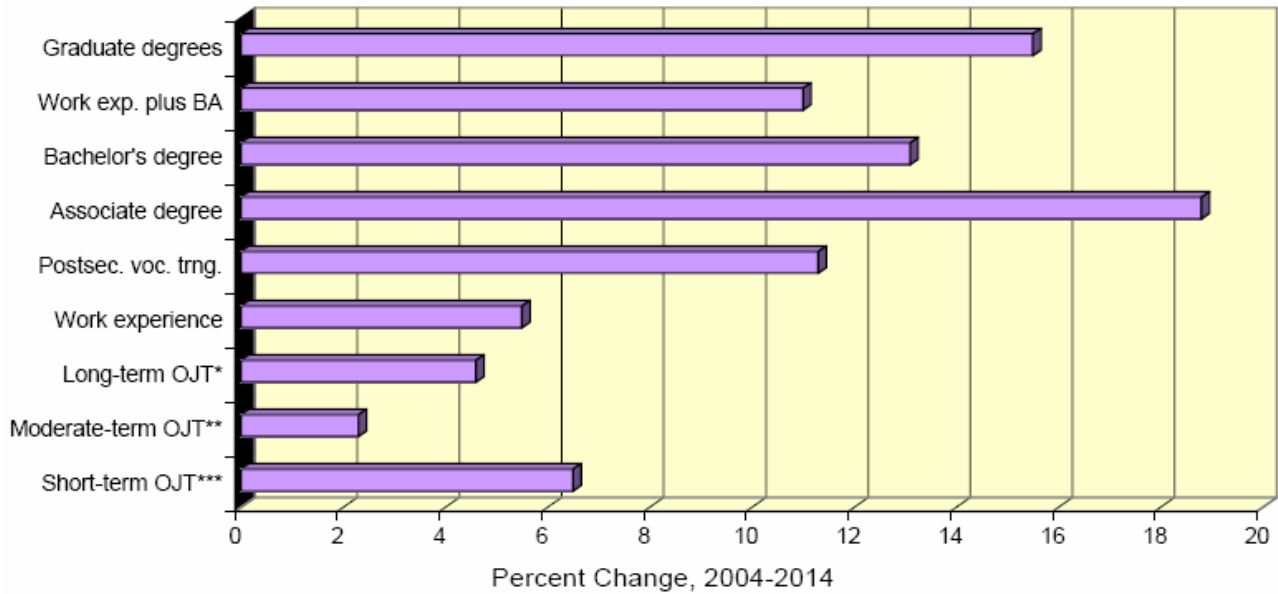
⁷ Rural economies traditionally rely on resource-based economies such as these, as cited in a report by the California Postsecondary Education Commission, June 2006. Prospectus for Examining the Challenges Community College Districts Face in Serving Rural and Remote Communities, p. 3. The report states that such economies, to be viable, must now diversify. Such counties struggle with similar problems such as "inadequate roads, limited public transportation...fewer educational and health care providers, unreliable telephone services, and limited access to high-speed Internet networks."

⁸ Data are from Ohio Department of Job and Family Services, Office of Workforce Development, and are available at the following web site: <http://lmi.state.oh.us/asp/edeps/EdepsNAICS.htm>

⁹ Ohio Department of Job and Family Services, Workforce Analysis: Jobs, Etc. – Workforce 411, p.2. 2007. Report is available online at: <http://www.lmi.state.oh.us/wia/archive/2007/JobsEtc.pdf>.

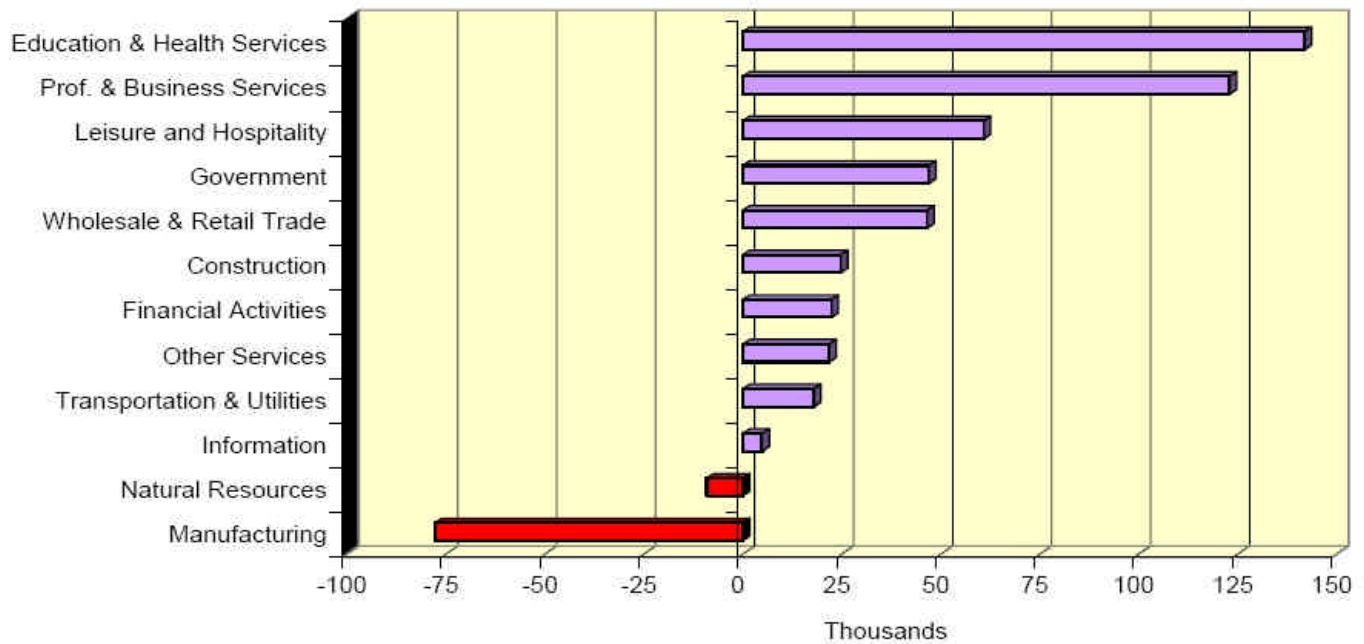
Figures 3 & 4: Ohio Employment Growth and Outlook¹⁰

Ohio Employment Growth by Education and Training Levels



* Long-Term on-the-job training is twelve months or more of combined experience and training.
 ** Moderate-Term on-the-job training is one to twelve months, combined experience and training.
 *** Short-Term on-the-job training is up to one month.

Ohio Employment Outlook by Major Industry, 2004-2014



¹⁰ Employment outlook data are from the Ohio Department of Job and Family Services, Bureau of Labor Market Information at the following site: www.lmi.state.oh.us/proj/projections/ohio/OhioJobOutlook.pdf

Among those employees who do work in the county, the largest sectors of employment (by decreasing number of employees) are:

- Manufacturing
- Local government
- Finance and insurance
- Retail trade
- Construction
- Services (excluding public administration)
- Accommodation and food service
- Transportation and waste

Current major employers in the county, in alphabetical order, include:

- American Energy Corporation
- Blaney Hardwoods
- Industrial Paint and Strip, Inc.
- Monroe County Government
- Monroe County Care Center
- Ormet Corporation
- Riesbeck's Food Market
- Safe Auto Insurance
- Slay Industries
- Switzerland of Ohio Local Board of Education
- Woodsfield Nursing & Rehabilitation Center (*Extendicare*)

Among these employers, Ormet and the county government are the largest.

Internet service in Monroe County. High speed Internet service was non-existent in Monroe County until recently, when federal funds from the USDA Rural Utility Service were used to create the GMN Tri-County High Speed Wireless Broadband Center in Woodsfield (Broadband Center). The center offers wireless broadband service and a video conferencing center equipped with 26 computer stations. Some courses are taught here and Internet service is available to homes and businesses within line-of-sight and proximity of the towers. Presently, there is one tower, with four more planned during 2007-08, to cover part of Monroe county.¹¹

Monroe County fits the typical profile of an area where rural community colleges are often located. It is perhaps more economically depressed than some other areas and is experiencing a population loss, especially of young people.

What kinds of community college initiatives can be successful in areas like these? How is post-secondary education typically delivered in these areas? It is to this topic the report turns next.

¹¹ See the following site for additional information about GMN: <http://www.gmn4u.com/default.htm>

b) Post-secondary Educational Trends, Initiatives and Models in Rural Areas

This second section of the literature review explores the challenges of post-secondary education in rural areas of America, the role of community colleges in those areas, and trends in delivering higher education to rural residents. It concludes with a discussion of delivery models being utilized in rural areas, as well as miscellaneous information that may be useful to consider.

Challenges for post-secondary education in rural areas of the U.S. Several unique problems that impact post-secondary education are faced by rural American communities. One is a dispersed population: while rural communities account for 85% of the nation's geography, only 15% of its population lives in them.¹² This situation makes delivery of post-secondary education difficult, as many rural areas do not have the population density needed to support an on-site college, faculty and other ancillary services and facilities.

Additionally, rural areas traditionally have lower levels of educational attainment. "...Rural communities contain higher percentages of residents (59%) who have not completed high school or who hold a high school degree as their highest educational degree, compared to residents of suburban (43%) and urban (44%) communities."¹³ This fact means cultural support for higher education is lower in many rural areas than elsewhere. Additionally, college preparation is often absent or insufficient in these areas, meaning at least one year or more of remedial study may be needed before rural high-school or GED graduates can pursue post-secondary education.¹⁴

Distance learning, or the ability to take courses at home via online technology, mail delivery or closed circuit television, has made great advances into all types of education, especially post-secondary education. But, the delivery of education by this method in rural areas is hindered by many factors, most especially, the "digital divide" between rural areas and their urban and suburban counterparts. Internet usage is highly correlated with certain demographics: those who are younger, have higher incomes and more education – the reverse of the population demographic of rural areas in general and Monroe County in particular.

Further, Internet service penetration, especially broadband penetration, is lower in rural areas than it is in urban and suburban communities. Distance learning becomes clumsy over phone lines utilizing text-based information (referred to as "narrowband"). Even in rural towns that offer wireless broadband service, access decreases with distance from transmission towers. The issue has gained national attention. One presidential candidate, Senator Hillary Rodham Clinton, proposes a new Rural Broadband Initiative, a "national broadband strategy that [will focus] on delivering broadband access to our rural areas."¹⁵

Community colleges across the nation are following this trend, as they rely on the Internet more than other technology-based delivery methods. Unfortunately, rural community colleges lag behind metropolitan ones in this regard; courses offered usually consist of only a few of a rural community college's offerings, not entire programs or degrees. In addition, rural community college faculty often lack the institutional support needed to develop and teach online courses.¹⁶

¹² Miller, Michael T. and Daniel B. Kissinger. "Connecting Rural Community Colleges to Their Communities." *Rural Community Colleges: Teaching, Learning, and Leading in the Heartland* 137 (2007): 27-34.

¹³ Cejda, Brent D. "Connecting to the Larger World: Distance Education in Rural Community Colleges." *Rural Community Colleges: Teaching, Learning, and Leading in the Heartland* 137 (2007): 87-98

¹⁴ Hebel, Sara, 2006. *In Rural America, Few People Harvest 4-Year Degrees*. The Chronicle of Higher Education, 53, 3.

¹⁵ Clinton, Hillary Rodham, 2006. *Senator Clinton Calls for Rural Renaissance to Restore the Promise and Prosperity of Main Streets and Rural Communities*. Press Release, July 31.

¹⁶ Cejda, Brent D. "Connecting to the Larger World: Distance Education in Rural Community Colleges." *Rural Community Colleges: Teaching, Learning, and Leading in the Heartland* 137 (2007): 87-98

Depressed economies in rural areas also affect the ability to deliver education at the primary and secondary levels. K through 12 education is often underfunded and attracting highly qualified teachers in rural areas is a problem. Because of the barriers to quality education, many students drop out of school, and can face significant remedial work before successful entry into postsecondary environments.¹⁷

In many rural communities across the country, poor job prospects encourage residents to seek out more education, even though many see tuition costs as a problem.¹⁸ Increasingly then, another difficulty faced by rural community colleges is the pressure to serve as economic development agents in rural regions. Monroe County is no exception; many community leaders feel increasing the post-secondary presence in the county would favorably impact the area's depressed economy.¹⁹

Across the nation, rural communities have similar ambitions, and many initiatives are trying to accomplish this.²⁰ In fact, there are many models for attempting to address the problems of post-secondary education and economic development in rural areas of the country. Trends in addressing these problems include:

- Remedial or developmental education for many rural students during their first year of college;
- Continuing support for first-generation college students, financial, collegial and otherwise;
- Different modes of delivering post-secondary education – face-to-face, by mail, via the Internet, teleconferencing, mixed-mode, etc.;
- Partnership approaches among various post-secondary educational institutions;
- Partnership approaches among educational institutions and non-educational partners in the community to deliver post secondary education;
- Use of educational “centers” where different institutions provide different post-secondary offerings at a single site;
- Use of post-secondary institutions and their facilities to provide non-credit courses and other activities to familiarize rural communities with colleges, raise student expectations and eliminate discomfort;
- Early intervention, such that K-12 students are introduced to and made comfortable with the idea of going to college early and often; and
- Focus training on jobs that are both available in the area and in alignment with residents' self image.

Overall, noteworthy models take the nature and culture of the rural community and its residents into consideration, partner with the residents, the colleges and community organizations, and “grow” solutions from within, with some planning and other assistance from outside. These models are discussed next. Note that seldom is one issue alone the focus of an effort. Because the problems are complex, the solutions are as well.

The Rural Community College Initiative (RCCI). A program of the Ford Foundation, this initiative consists of a partnership among 24 community colleges in distressed rural regions, particularly in the south. It is designed to help these institutions achieve two concurrent goals: economic development and increased access to education to revitalize rural areas. The

¹⁷ MDC, Inc., September 2001. Expanding Economic and Educational Opportunity in Distressed Rural Areas: A Conceptual Framework for the Rural Community College Initiative. RCCI; A national demonstration of the Ford Foundation.

¹⁸ The Education Policy and Leadership Center and the Learning Alliance for Higher Education, April, 2006. A Rising Tide: The Current State of Higher Education in the Commonwealth of Pennsylvania.

¹⁹ See Section IV of this report for results of the Key Stakeholder Interviews.

²⁰ Pennington, Kevin, Mitchell R. Williams, Meagan Karvonen. (2006). Challenges Facing Rural Community Colleges: Issues and Problems Today and Over the Past 30 Years. *Community College Journal of Research and Practice*, 30, 641-655.

program provides initial grants to support intensive planning by a team composed of both college and community representatives. RCCI initiative members believe community colleges are positioned well to do economic development because they are seen as “common-ground” institutions – they are trusted by people across social classes. They are also seen as catalysts for change in many arenas – K-12 education, public investment in higher education, and increased job opportunities. Perhaps one of the most crucial changes that rural community colleges can inspire is increased cultural value about education:

Throughout the 19th and 20th centuries, most jobs in rural America required little formal education. The rural economy failed to provide an incentive for completing high school, let alone college. Today, the playing field has shifted -- education is a prerequisite for both individual and community prosperity – but many people have not heard the message. Community colleges can be a powerful force for economic development by encouraging a strong education ethic in their region.²¹

Less directly, community colleges serve as catalysts for change in the realm of economic development.²² The RCCI lays out new approaches that are needed to bring solid economic development to rural communities, and sees the role of community colleges as preparing workers for technical operations, upgrading the literacy skills of adults in the workplace, and ...providing customized training for employers. RCCI’s vision for future approaches to encouraging economic development in rural areas is displayed in Table 4.

Table 4: RCCI’s Economic Development Approaches for the Future

Typical Past and Current Approaches	Approaches for the Future
Heavy dependence on natural resource base – agriculture, extraction, and timber.	Importance of intellectual, cultural. And civic resources for economic development.
Recruitment of industry, marketing cheap land, labor and taxes.	Enhancing productivity and competitiveness of existing businesses and workers; help for new business start-ups. Strengthening the foundation for development. especially civic infrastructure.
Competition among adjacent towns and counties.	Regional approach that involves business and civic leaders across town and county lines.
Economic development priorities often set by one or two agencies, in a process dominated by established interest.	Priorities emerge from collaborative process involving multiple agencies and organizations, with broad-based community participation and support.
Focus on increasing the number of jobs.	Focus on raising the overall economic tide while also benefiting lower-income, lower-wealth residents.

An outgrowth of RCCI is the Rural Community College Alliance, which also focuses on the dual goals of education and economic development in rural areas.²³

Developing leadership. Exploring further the trend of community colleges as agents of economic change, one of the biggest problems encountered has been the lack of new leaders in the community to head up the effort. Some programs that address this challenge follow a typical Chamber of Commerce leadership program. They recruit 10 to 20 people and put them through

²¹Pennington, Kevin, Mitchell R. Williams, Meagan Karvonen. (2006). Challenges Facing Rural Community Colleges: Issues and Problems Today and Over the Past 30 Years, *Community College Journal of Research and Practice*, 30, p. 12

²² Pennington, Kevin, Mitchell R. Williams, Meagan Karvonen. (2006). Challenges Facing Rural Community Colleges: Issues and Problems Today and Over the Past 30 Years. *Community College Journal of Research and Practice*, 30, 641-655.p. 4.

²³ See the following website for more details: <http://www.truenorth.mnscu.edu/mission.html#workplan>

an eight-week leadership course, which increases their networking skills but not necessarily their skills as agents of change.

Carol Lincoln, of MDC, Inc (the non profit organization that has implemented RCCI across the nation) suggests the Meridian Model, is even more successful. This model, implemented in conjunction with Meridian Community College in Mississippi and the Montgomery Institute, developed a year-long program to make participants into agents of change and assure skill development, not just networking abilities.

In the Meridian model, a college and its partners created teams from a cross-section of the community with a goal of community-wide buy in. A core team led the effort and the circle kept widening. "Meridian took the core team to the nth degree. Did a community analysis to identify all the people they wanted to include. Got to 150. Analyzed who were the troublemakers, peacemakers, etc., via a private, back-room community analysis. They were very selective as to whom was asked to participate." Kentucky, in contrast, did a broadcast invitation to anyone who wanted to participate, with less success than the Meridian model.²⁴

Achieving the Dream Initiative. Proactivity in assuring individual student success may be fundamental to the message of the rural community college. Rural community college students often are first-generation college students. Many have had high-school educations that have not prepared them well to succeed in college. The majority of them need remedial or "developmental" education during their first year of college, with many supporting services, including advising, financial aid, and provision of learning communities with other students to create a sense of belonging or community. A national program, Achieving the Dream, focuses on this issue:

Achieving the Dream aims to bring about change within community colleges and in state and federal policy. The initiative also seeks to augment knowledge about strategies that increase student success and to expand public support for raising postsecondary attainment levels.

At its core, the initiative seeks to help more students reach their individual goals, which may include earning a community college certificate or degree, attaining a bachelor's degree, and/or obtaining a better job. Achieving the Dream colleges will maintain a high degree of access for historically underrepresented groups while working to increase the percentage of students who accomplish the following:

- *successfully complete the courses they take;*
- *advance from remedial to credit-bearing courses;*
- *enroll in and successfully complete gatekeeper courses;*
- *enroll from one semester to the next;*
- *earn degrees and/or certificates.*²⁵

In 2006, five Ohio institutions joined Achieving the Dream, one of them serving a rural population: Zane State in Zanesville.

Transitioning students to web-based learning. An initiative of interest, though not a community college initiative, seeks to create better on-line learning environments for non-traditional (older) graduate students in rural areas. The initiative advises that: e-learning courses be of the same quality as traditional courses; that faculty be well trained in the use of technology; that students have technical and academic support; and that students start with an on-campus orientation before transitioning to web-based learning. This transition from traditional

²⁴ Researchers acknowledge the help of Carol Lincoln of MDC, Inc., who was interviewed extensively on June 5, 2007 on RCCI and many related issues regarding trends among rural community colleges.

²⁵ See the following website for more details: www.achievingthedream.org

modes of learning to more web-based modes is absolutely critical for success as rural students may not be technologically savvy.²⁶

Collaboration among colleges and mixed modes of delivery. Another related trend is for increased collaboration among post-secondary institutions and other entities, as shown by the Wyoming and Montana models discussed next. The Montana model is discussed in depth because it is also illustrative of another trend – hybrid delivery or use of mixed modes in post-secondary education.

The Wyoming model. Wyoming has created a consortium of entities that goes beyond community colleges – seven Wyoming community colleges, the University of Wyoming, Wyoming Public Television and the Wyoming Community College Commission. The consortium, the Wyoming Community College Distance Education Consortium (or WyDEC) coordinates and supports distance educations. By creating a common course-numbering system and a standard tuition rate across institutions, it has overcome two key obstacles for the rural community colleges in its area²⁷.

The Montana model. The University of Montana at Missoula responded to a demand from early childhood educators throughout the state for higher education for non-served and underserved areas. The result has been a program entitled *Child Care Plus*²⁸, which is a collaborative project with the University of Montana-Western through the U of M Rural Institute. It offers courses to individuals throughout the state with limited or no access to post-secondary education because of the size and rural nature of the state. According to Sandra Morris, the Co-Director of the Center on Inclusion in Early Childhood, the *Child Care Plus* program is designed to prepare current and future teachers of young children in rural Montana by offering academic credit for core early childhood courses through a combination of intensive institutes and self-study at home, holding the curriculum content constant throughout the four basic delivery methods:²⁹

- Intensive course work on site: Students take courses at the University of Montana-Western in “blocks.” That is, there is intensive education for shorter periods of time at the central site. They can finish three “blocks” in one semester. Travel and other related expenses are minimized.
- Course work at satellite sites in rural areas: In this mode, a faculty member, who meets regularly with the department head of UM-W, lives in the rural community and teaches the same courses, using the same syllabus as is used for the “on site” model just discussed.³⁰
- On-line courses: In this model, students can work toward a bachelor’s degree. The core competencies are the same.
- Self-study through the mail: For those with no online access, a mailbox or post-office box is all that is needed to do the coursework. Faculty help facilitate the process and give feedback to students, who must meet two times during the course – one for orientation and one for their exit interview.

For both the online and self-study mail models, the practicum portion includes mentors observing the students interacting with the children and parents.

There are also hybrid options available for distance education in this model. For instance, some students work with graduate students at a distance. Camcorders are used via computer for classes and observation. Whichever option is utilized, Morris recommends that they be

²⁶ Lake, Erin D. and Pushchak, Andrew J. 2007. “Better Allocating University Resources to Create On-Line Learning Environments for Non-Traditional Students in Underserved Rural Areas.” *Innovative Higher Education*, vol.31, pp. 215-225.

²⁷ Cejda, Brent D. “Connecting to the Larger World: Distance Education in Rural Community Colleges.” *Rural Community Colleges: Teaching, Learning, and Leading in the Heartland* 137 (2007): 87-98

²⁸ <http://www.ccplus.org/>

²⁹ Morris, Sandra. In depth phone conversation with Karen Snyder of The Strategy Team on April 6, 2007.

³⁰ As of the time of the interview with Sandra Morris, there were 12 such satellite locations in Montana.

reasonably priced. Many people in rural areas do not have technology, she says, a shortcoming that sometimes is overcome by writing grants to support the technical aspects. She further recommends that the process, whatever the delivery method, be friendly and relationship-based. Because the classroom is a familiar way to get an education, other models, especially the online model, can add to the learning curve of students unfamiliar with computers. Not only must they learn the course content; they must also learn the technology. Telephone “focus groups” with distance-learning students have also been found to be helpful. They are inexpensive and increase accessibility of the faculty member and the students, Morris reports.

The Arizona Model. A hybrid approach is also used in Arizona for students from rural, underserved areas of the state. In many cases, part of the classes are delivered online and part are delivered face to face, “giving rural students both important personal interaction and the flexibility to complete the course at their own pace.” The Arizona model also offers special transition programs for first-generation college students as well as those from rural areas. For Native Americans, there is even a Native American Summer Institute to help students acclimate to the academic and social aspects of college and city life. Arizona State University also maintains close partnerships with community colleges in rural counties to “create new pathways to the baccalaureate.”³¹

The Washington Model. Early intervention has been mentioned already – that is, creating a college mind-set in rural students while they are still in middle or high school. In Washington, this idea is taken even further. In rural Washington State’s Grant County, only 1 in 8 or 12.5 % of the adults hold a bachelor’s degree. To improve the college-going rate, one superintendent in Grant County focuses on raising student’s reading skills and college ambitions at an early age and tries to emphasize the economic benefits of higher education. “One of the main barriers to college attainment in rural populations is that many adults who earn a GED...need to pay for at least a year of remedial study before taking college courses.” Inspiring students to feel they can (and should) attend college at earlier ages may help alleviate the need for this remedial action.

Another technique used in Grant County is to “train residents in jobs that are available in the area and in occupations in which residents could envision themselves.” Colleges focus on programs in fields that are compatible with these circumstances and self images.³²

Ripple effects. Rural revitalization can occur by exposing rural residents to higher-education in a variety of ways: through leisure programming, including summer sports camps on campus for youth, fitness classes for senior citizens, adult basic literacy instruction, small business development, contract training and retraining for business and industry, etc. All of these activities present a variety of opportunities to rural residents to change their frame of thinking about themselves. “Most of these programs have unintended psychological and social outcomes...that provide exposure to world differences...[that may] result in a changed global perspective...lead to greater self-confidence and self-awareness.” It can also lead to changing self-identity, such that individuals “might begin to envision a different occupation or quality of life” for themselves, thus impacting the rural culture itself. This report does point out however, that some activities, especially emphasis on academic transfer programs, may lead community colleges away from their historic roots in job training, vocational education and responding to immediate community needs. These programs tend to foster a desire for a more traditional liberal arts education in the students who experience them.³³

Other unintended outcomes of community college presence in rural areas include: increasing feelings of self worth among community members; broadening self-identity to appreciate

³¹ Crow, Michael M., *Advisors Help in Arizona*. The Chronicle of Higher Education, 1 N 3 2006 supplement.

³² Hebel, Sara. *In Rural America, Few People Harvest 4 Year Degrees*. The Chronicle of Higher Education, 53 no. 11, N3 2006.

³³ Miller, Michael T. and Daniel B. Kissinger, 2007

diversity in others; developing relationships among community members, and higher expectations for overall quality of life.³⁴ All of these side benefits can be seen as ripple effects of exposure to post-secondary classes or facilities.

Collaborative efforts in Ohio. Various forms of collaboration have been discussed, but two in Ohio are particularly relevant to Monroe County.

- *Morgan County Learning Center.* The Morgan County Learning Center is located in a neighboring county in southeastern Ohio with a population similar to Monroe's. The Center is located in the county health building and houses a classroom for 30 students, a computer lab with accommodations for 15 computers, a student lounge with amenities, and a coordinator's office. Seven colleges, through the Morgan County Higher Education Consortium, collaborate to offer courses there: Washington State Community College; Muskingum College; Zane State College; Ohio University in Athens; Ohio University in Zanesville; Hocking College and Marietta College.

Courses offered or planned run the gamut from nursing, a master's degree in teaching, and small business entrepreneurship certification to belly dancing for fun and fitness, stress management and goal setting. The center partners with agencies and others as well as institutions of higher education. The county owns the building; Ohio Department of Job and Family Services collaborates in several ways, including providing cleaning services for the building; and the Ohio Learning Network helps as well. Startup funds for the center were provided by the Osteopathic Heritage Foundation of Nelsonville.³⁵

- *Coshocton Campus.* Another relevant approach in Ohio is in Coshocton County, lying between Columbus and Monroe County, with a slightly increasing population that is currently more than double that of Monroe's. The Coshocton Campus offers several degree programs, including those of associate, bachelor and master from institutions that include the Central Ohio Technical College and Muskingum College.³⁶

"Indiana – not India" model. Another new twist on economic development in rural areas is enhanced collaboration between the college and the community it works with. One company, Rural Sourcing, Inc., works with colleges in several states to set up technology parks located near colleges in more rural areas. Termed the "Indian – not India" initiative, this company seeks to prevent outsourcing of technology jobs by providing cheaper labor here in the United States. Rural Sourcing, Inc. employs local colleges' technology students and graduates, offering a favorable monetary situation for both employees and employers. The cost of living in the rural areas (and the wages needed to sustain it) are lower than in big cities, and trained employees can stay in their home area to work instead of leaving to find decent jobs. It can stop the "brain drain" that can occur when those from rural areas leave to get educated and never return. On the employer side, the problems encountered with outsourcing technology jobs overseas – serious communications and time barriers among them – are eliminated.³⁷

"Grow Our Own Faculty" Initiative. In many rural areas there is both a shortage of nurses and a shortage of faculty to educate new nurses. An initiative in Texas, through a partnership with the Harris School of Nursing (HSN) at Texas Christian University, increases access to graduate nursing education for existing nurses already living and working in rural areas. These nurses then become the master's or doctorate-level faculty needed to teach nursing students, thereby

³⁴ Miller, Michael T. and Courtney C. Tuttle. "Rural Community Colleges Role in Community Development: Unintentional Outcomes of Continuing and Extended Education Activities." *The Catalyst*, Vol 35, no. 1, Spring 2006.

³⁵ Hurst, Sara. "Morgan County Learning Center Invites Community to Open House this Friday." *Morgan County Herald*, March 30, 2007.

³⁶ For an in-depth description of the campus and its offerings, go to the following web site:
<http://www.coshoctoneducation.org/coshocton/>

³⁷ Carnevale, Dan. *Technology Companies Bring Outsourcing Home*. The Chronicle of Higher Education, 52 no 31, April 7, 2006.

increasing the supply of registered nurses in the area. The initiative uses partnerships with rural nursing schools, online education, student stipends to assist with tuition and other costs and mentoring programs to accomplish its goals.³⁸

Focus on literacy and training. Another approach community colleges can take to help with economic development is to focus on adult basic literacy, certification for certain machinery, training in International Standards Organization (ISO), displaced worker training/retraining, small business development, etc. All of these are tools of economic development that, some say, community colleges can provide.³⁹

In summary, trends and models in delivery of post-secondary education to rural areas include the following:

- Collaboration among many stakeholders, including educational institutions, and business, civic and government leaders to achieve twin goals of post-secondary education and economic development;
- Sharing one post-secondary facility by several institutions offering a mix of college classes and programs of interest to those in the community;
- Developing leadership in the community as a necessary condition for change and support of post-secondary efforts and economic development;
- Providing what is needed for rural students to succeed in a post-secondary environment. This can include early intervention/exposure to post-secondary education during grades K-12, remedial education after high school, additional support during the first year of college, etc.;
- Use of multiple modes of delivery of education – i.e., ace-to-face, condensed courses on site, condensed courses off site, on-line education, videoconferencing, courses by mail, and the like;
- Provision of training in technology to both students and faculty;
- Focus on training that is job relevant (especially relevant to local jobs) and consistent with residents' self images.

³⁸ Baldwin, Kathleen M., PhD; Charles Walker, PhD. RB; and Elaine Evans, PhD, RN. 2004. "Increasing Nursing Faculty in Rural Texas Through Online Education." *Educational Innovations*. December, Vol. 43, No. 12.

³⁹ Miller, Michael T & Daniel B. Kissinger. Connecting Rural Community Colleges to their Communities. *Rural Community Colleges: Teaching, Learning, and Leading in the Heartland* 137 (2007): 87-98

IV. Research Results: Key stakeholder personal interviews

In a project such as this, the results of the research and the decisions based on those results may have a significant impact on the community involved. The community can also have a measurable impact on the success or failure of any decision that is made. For these reasons, it is important to gather opinions from key community leaders whose attitudes and actions should be taken into account to go beyond a simple review of historical data and current best practices.

As the second component of the market feasibility assessment of post-secondary education in Monroe County, in-depth interviews were conducted with key stakeholders representing three groups of people in Monroe County – educational leaders, political leaders, and employers from business and industry.

Key Research Findings – Key stakeholder personal interviews

- The County's perceived strengths are its physical beauty and resources, as well as the friendly family-oriented people who live there.
- The County's perceived weaknesses include a deficit of jobs and employment opportunities, an aging population (in part caused by the emigration of younger residents), and a culture that has placed a low value on education (as indicated by aging or out-of-date K-12 facilities, gaps in the curriculum, etc.).
- If a higher education center is built in the County, the training and education received there may provide high school graduates with the preparation and confidence they need to obtain employment – learning “how to succeed close to home” and advancing from there.
- If a higher education center is built in the County, stakeholders believe it should be centrally located so travel time and costs are minimized. Such a site should look and feel like a college site (as opposed to a high-school classroom) to help set higher expectations among both enrollees and county residents. Overall, most stakeholders recommend a phased-in, collaborative approach involving multiple higher education institutions, government, and private sector employers.

A list of potential interviewees was identified and each was sent a personal letter from Dr. Joseph E. Bukowski, President of BTC, outlining the project and informing them that a member of The Strategy Team would contact them to set up a personal interview.

In each interview, a similar line of questioning was used (see discussion guide in Appendix A) with additional probes used to clarify responses. All interviewees, except for two of the County Commissioners, who were in public session for the interview, were assured their comments would be anonymous, though not confidential, and their opinions would be reported in the aggregate. Prior to asking the questions in the discussion guide, the interviewer outlined the three-step research process to all interviewees (Secondary Literature Review, Key Stakeholder Interviews and Telephone Survey) so they would understand their role in the market feasibility study.

The interviewees, their organizations and their positions within their organization are shown in Table 5. All interviews were conducted in-person, unless otherwise indicated.

Table 5: Key Stakeholder Interviewees

Sector: Education		
<i>Organization</i>	<i>Interviewee(s)</i>	<i>Position of interviewee(s)</i>
River High School	Dr. Vince Monseau and Linda Joseffczyk	Principal, Guidance Counselor
Belmont Technical College Trustees	Suzanne Pollock	Trustee, Education activist
Switzerland of Ohio Local School District	Mike Staggs	Former Superintendent
Sector: Business & Industry		
<i>Organization</i>	<i>Interviewee(s)</i>	<i>Position of interviewee(s)</i>
Citizens National Bank of Woodsfield and Sardis	Carey Bott	President
Ormet Corporation	Deborah Nisley and Stacy Stewart (sitting in for Lisa Reidel, VP/General Manager)	Human Resources Director, Training Supervisor
Woodsfield Nursing & Rehabilitation Center	Leslie Thompsom	Administrator
Safe Auto	Tru Jooris*	Senior Manager, Woodsfield Call Center
Sector: Government		
<i>Organization</i>	<i>Interviewee(s)</i>	<i>Position of interviewee(s)</i>
Monroe County Commissioners	John Pyles, Bill Thompson	County commissioners
Monroe County Commissioner	Sonny Block (separate interview)*	County commissioner
Monroe County ODJFS	Debbie Haney*	Director
Sector: Miscellaneous		
<i>Organization</i>	<i>Interviewee(s)</i>	<i>Position of interviewee(s)</i>
Monroe County Beacon	Arleen Selvey	Editor
Monroe County Chamber of Commerce	Dick Sulsberger	President
Retired Commissioner, former BTC trustee	Mark Forni*	Ohio Department of Agriculture

* Indicates interview was conducted by phone

The report now turns to emerging themes from the interviews. Because respondents tended to discuss multiple issues at different points of the interview, cross-cutting themes are presented, rather than responses to each of the questions in the discussion guide. Verbatim comments from interviewees (italicized in the report) are used to illustrate each of the key points. Finally, additional comments not discussed in the cross cutting themes, including current perceptions of Belmont Technical College and miscellaneous comments are included in Appendix B

What's good about Monroe County (in general). Interviewees painted a picture of a physically beautiful county with friendly, family-oriented people that had survived for several decades in the late 20th century on two major industries – coal mining and aluminum processing. Both industries provided thousands of Monroe County residents with a comfortable standard of living. Interviewees stress the safety and feeling of community present in the County (along with a low cost of living) as the major attractions for area residents. Their verbatim comments along these lines include:

- * *Very rural, vibrant beauty.*
- * *Hilly, beautiful, rural, quiet. Wonderful place to raise children, live in the country, close knit, welcoming if you live here... About 50 retired military have moved here because the land is so inexpensive.*
- * *Good, safe place to raise a family; can leave doors unlocked; low crime.*
- * *Small-town atmosphere; everyone knows everyone; very family oriented.*

What's problematic about Monroe County (in general). Monroe County is facing a deficit of jobs, interviewees indicate, high unemployment and poverty rates and out-migration of capable younger people, who leave the county to obtain higher education or locate good jobs and never return. The county is aging and education levels are lower than elsewhere in the state. Additionally, high-sulfur coal, Ohio's energy mainstay, has fallen out of favor and some mines have closed. Ormet, a major county employer, cut its workforce from 3,000 to 1,000 and struggled through a recent two-year strike with very few employees. The decline of these once-thriving industries leaves many Monroe County residents without access to good-paying jobs that require little in the way of formal education. Finally, some respondents suggest the very small town feel that is an asset can sometimes backfire – creating an “ol’ boys club” that can stifle community growth and change. Verbatim comments regarding these issues include:

- * *Highest unemployment rate in state.*
- * *People get settled in and resist change. Employment opportunities were here for decades, then that changed as several industries ran into trouble.*
- * *In dire need of change. There is a “good ol’ boy” system in place and much gender discrimination.*
- * *We're very parochial, with few leadership skills present.*
- * *We have generations of welfare families in Monroe County. There is a welfare mentality. It shows in our unemployment rate.*
- * *Younger population moves to get jobs and older citizens are left.*

A culture that does not value education. For most of the recent past, Monroe County residents could secure reasonably well-paying jobs with good benefits and could support a family without additional education or certification. This situation led citizens to historically place a low value on not only post-secondary education, but on education in general, interviewees indicate. Thus, the K-12 infrastructure has the identifying marks of a struggling system including aging and out of date facilities, gaps in the curriculum, and difficulty supporting an expensive transportation system, as these verbatims reflect:

- * *Students in the high school move from trailer to trailer. Education is put on the back burner.*
- * *We were considered a rich district in the past because of a booming aluminum industry. Not so now.*
- * *Our educational system doesn't do well at teaching critical thinking. We must have the right kind of teachers.*
- * *There are no advanced placement courses for kids to help them excel in college. Not even any chemistry classes as too few kids want it. Families concerned about education don't come here.*
- * *We are the largest geographic school district in Ohio. Our school drivers combined travel over 7,000 miles every day.*
- * *Our system is one of the poorest in the state. Bad facilities. We intermingle high school with vocational education. Have kids in trailers. Huge transportation needs... There's not much left for*

quality programming and books, etc... Our kids can go to college, but must catch up when they do. Lack of funding keeps us behind the 8-ball. Students are behind technologically. Lack of adequate funding means average teachers, under preparation for undergraduate studies, limited curriculum.

The lack of solid primary and secondary education in the county both contributes to and results from a perceived lack of emphasis on higher education, interviewees say. Residents don't see the need for these educational programs and children and young adults aren't made aware of the benefits of higher education. Residents' lack of support for education is evidenced by their failure to support tax levies. The following comments provided by interviewees reinforce this point:

- * *Our K-12 system needs work. Our children don't know we value education.*
- * *It's hard to explore your talents in Monroe County.*
- * *The grade and high schools in the county must change to get increased interest in higher education. We must have better schools that are able to get on the level of the kids and grab their interest and allow them to see the future benefits of college.*
- * *We have mixed feeling here about post-secondary education. It's good for responsible students, but may not be for those who are not driven.*
- * *The school district is afraid of post-secondary options. They would lose money when high-school students take college courses, as state money follows the student, unless new legislation changes that.*
- * *We must grow what we have. People must want education.*
- * *The local school system must buy in to the idea. Guidance counselors must "guide," promote, understand and explain to students so they can explain to their parents. BTC must meet with high-school teachers, guidance counselors and administrators. Tell them their help is needed to tell young people they can "do it."*
- * *People do not vote for school levies. Last operating levy was passed in 1985. Older folks do not want higher taxes.*
- * *Need some way for folks to see the benefits of higher education. Example: Ormet comes to the schools and says, "We won't hire you unless you have these skills." Our people need to see the real situation.*
- * *To foster an interest in higher education, we must start young and people must know it's available in the county. The best success is seeing others succeed. For the kids here, the seeds aren't planted. A facility here would help make it easier to do, more accessible.*
- * *We must stress higher education in our current system, which we don't do now. We probably discourage post-secondary during high school as the dollars go with the student.*

Some interviewees went so far as to say that post-secondary education in Monroe County should be a secondary goal. The primary goal, as reflected in the verbatim comments below, should be to improve the quality of facilities and teaching and learning in the local K-12 system:

- * *(Not a good idea) unless we improve K-12 education first or at the same time.*
- * *Until we get better elementary and high schools there is no need for more higher education in Monroe County. No school operating levy has been passed in this county in the 24 years I have lived here. That's pathetic. Our own kids are successful, in spite of the education situation because we, personally, have high education values. The poor education contributes to population decline.*

Note that some interviewees see the tide turning on this point and suggest recent economic downturns and the lack of jobs that pay well may make the benefits of higher education more clear. The following comments speak to this point:

- * *It's a new idea for parents and students to recognize the relationship between jobs and education. More students are now considering post-secondary. The Ormet strike hit them hard. Parents worked there and lost their jobs; many had few skills. Parents were slow to recognize the need for education. Students are recognizing it first.*

- * *We push it here at school; give statistics regarding dollars earned; have life-planning classes, college fairs. Put ads on the radio about the new facility and courses.*
- * *Twenty years ago, interest in higher education wasn't there. Now it is.*

Lack of self confidence regarding education. As a result of the educational situation just described, students in high school in Monroe County as well as graduates of the local school system are said to have little confidence in their ability to compete with others from outside of the county. Many from Monroe County require remedial education. A facility in the county, many interviews said, would attract more Monroe County enrollees, who could “get their feet wet” regarding college classes, learn how to succeed close to home, then advance from there. Several comments from interviewees stress this point:

- * *We need something that catches kids who fall through the cracks. There is a large group that feels they don't fit in and don't participate in higher education. If there is a facility here, they should target this group. Many parents here don't have college experience. Many kids need help to get into an institution.*
- * *Leadership training is offered at BTC, but people from Monroe County have not signed up. Doubt they will unless the courses are held here in the county. They do not feel comfortable being leaders elsewhere.*
- * *For the individual, it develops self esteem, security. This area needs that.*
- * *Many adults feel they can't compete. If the facility was here, they would feel differently.*

Economic and safety considerations favoring a local facility. Recognizing the economic and geographic situation in Monroe County, many interviewees individually made an economic case for a centrally-located post-secondary facility within the county. Those who need the education most, they say, are least able to afford all of its component parts, which include:

- Tuition;
- Gas to drive to an out-of-county facility;
- A car and car maintenance; and
- Day care for a long period of time to drive to and attend classes.

These same potential students, if they work, are generally employed in low-paying jobs, have little flexibility regarding working hours, and must drive roads that are curvy, hilly, and potentially unsafe. A site within the county, with a few professors traveling to teach (or teaching online by internet or video-conferencing), would make more sense, some say, than a lot of students traveling to outlying colleges. Their opinions regarding this issue include:

- * *Many with lower incomes; no money or opportunity for higher education. For our youth to get higher education, they must drive 45 minutes to one hour. Money is scarce to begin with – many have no money for gas, travel.*
- * *We need in-county opportunities, including post-secondary classes in the high schools for high-school students*
- * *A lot can be done here (in Monroe County). We can expand what BTC does now; our school facilities plan has a community center in the school for college classes, even during the day.*
- * *There should be a day care on site. Access in this county is a problem. People must drive a lot. Offer a hot lunch/meals.*
- * *They have no car or money for gas. Must drive Rt. 800 – a bad road, with buggies barely marked for visibility... More could attend if there were a facility in Monroe County.*
- * *Best hope is that 80% of our high school graduates would attend. A facility in the county would help, as transportation is a big issue here.*
- * *Some drive an hour to get higher education, but many can't. A facility here could help jump-start that process... those with a job that pays \$8 to \$10/hour find it hard to get child care, pay for transportation, and pay for college.*
- * *All the post-secondary opportunities are out of the county. We have bad roads and driving conditions can be unsafe for teens.*

Note that not all respondents see a need for a facility in Monroe County. As discussed previously, some feel it is folly to pursue higher education without a strong primary and secondary education system. In addition, at least one respondent said, *“People who live in Monroe County drive to do everything. We’re used to it. There is no big gain having higher education closer to home.”*

Need for dedicated college site. If a facility is build in Monroe County, it must look and feel like a college site, not a high-school classroom or room in a basement of a familiar building, many interviewees say. Some prefer bold signage that labels the college site. Not only would it give the impression of a real college, but it could help to set higher expectations among those in Monroe County. A few think a phase-in approach might be best, where an existing facility (perhaps the broadband facility) is utilized until a permanent facility can be created. These verbatim comments reinforce this need:

- * *Need a location associated with a college, as well as appropriate signage.*
- * *It should be centrally located, a nice facility that people are proud to walk into. Must have key partners in place – both 2-year and 4-year colleges.*
- * *Those who do want [a higher education presence in Monroe want] a dedicated building or campus where they can walk the halls. Don’t want to come back to Swiss Hills, where they graduated.*
- * *... place with a sign that says BTC so folks understand it’s a college.*

Partnerships and models for collaboration. There were many suggestions about the operation of a post-secondary presence in Monroe County. First, many interviewees suggested cooperation with several colleges or a partnership with other organizations would be beneficial. For example:

- * *One concern is that a facility would be perceived as a branch of BTC. That won’t give good results. We must have a broad base of colleges involved – OUE, etc.*
- * *A facility should be created in Woodsfield, with six or seven colleges participating.*
- * *We need more unity in the county for working together for education... People have their own agendas and get lost in them. Want to see the colleges working together. They don’t do that now. BTC and OUE are more competitors than partners.*
- * *Partnering of educational institutions is very important.*

At least three interviewees made suggestions about specific models they would like to see considered in Monroe County:

- * *Small liberal arts colleges energize a community. You get minds you need. Forward-thinking, community-oriented minds can drag the locals with them.*
- * *Preferred model: Professor comes here to conduct intensive courses .*
- * *Coshocton model is the direction we need to follow. Started with 35 students; now have over 600. Cooperative between COTC, OSU, Muskingum... Find the community needs and adapt. Use facilities to help students enroll anywhere, use a niche approach.*
- * *Have articulation agreements for core credits with other universities (exception=technical credits).*
- * *I like the education center model, in Woodsfield. It would be well utilized.*

Course content and delivery methods. Stakeholders made a number of suggestions for the best types of courses and delivery methods but also stressed the need for constant reevaluation, and above all else, flexibility in curriculum, as these verbatim comments indicate:

- * *We must develop communication with business and industry in the district. We could enhance their candidate pool of employees. There are a significant number of people who work on barges, power plants, etc. These can be specific skill requirements. Should do a survey of employers in the area (e.g. Ormet, chlorine plants across the river.)*

- * *People must be aware of the opportunities. Ask business leaders, government, etc – what are they looking for in the future? Must keep pos-secondary education in synch with needs.*
- * *And courses offered would need constant revision and evaluation. Survey parents and employers. Have courses in areas of interest. Student-friendly courses, articulation agreements.*
- * *The administrator of the (post-secondary) center needs to concentrate on identifying needs. There would have to be an ever-changing curriculum to keep up with changes.*
- * *More entities must communicate. Not only do the commissioners and the schools not talk, but the businesses don't get involved. Nobody knows the needs. Must assess the needs.*

In a similar vein, the structure of the program, and its methods of delivery must be flexible, and responsive to the needs of adult learners. This would include distance learning technology, flexible and appropriate course times, etc, as these comments illustrate:

- * *It should be delivered in two or three media forms – online, videoconferencing, etc.*
- * *Classes of adult learners, extended class hours plus ability to work on their own.*
- * *Limited schedule of classes, but intense – perhaps a four-hour class once a week or consolidated weekend classes.*
- * *There must be day classes, evening classes, weekend classes. Online classes, mail classes, etc. Integration of jobs and education must occur. That is not the case now.*
- * *Flexible scheduling would be needed, as adults would be entering. Child care might have to be provided, as the teen pregnancy rate here is high.*

Key stakeholders believe course content should focus first on the skills needed for job retention and promotion, then secondarily on skills for new jobs. This focus on skills for current positions would include basic skills required of all jobs, as well as a strong adult education component.

See verbatim comments below:

- * *Put the emphasis on computer skills, calculators, basic computer programs like Word and Excel. More math, budgeting, check-book balancing.*
- * *I believe we must work on job retention first. Look at the jobs that are here. Ormet, for instance, must use WCCC for training now.*
- * *Skilled labor and technology are needed – they can take these anywhere. Credentialed education; small business skills to help Monroe County develop.*
- * *I know many of our adults need remedial education.*
- * *[I hope] we would teach such things as customer service skills, work ethics, etc. – get our people ready to work or “have them ready” for businesses.*
- * *Need management-type courses.*
- * *Must offer adult classes, adult career center.*

In addition to these general, work-ready needs, respondents saw a number of specific, technical gaps that a higher education presence in Monroe County could help fill, including:

- * *Needs are for skilled labor: machinists, welders, pipe fitters. Can't fill the jobs being left by retiring baby boomers.*
- * *... need for writers and sales representatives. Problem finding qualified ones who have a work ethic.*
- * *Offer a variety of things such as allied health and nursing; welding certification; electrical certification. We need accountants with four-year degrees as well as skilled craftspeople.*
- * *Construction with power plants is going on and they have trouble finding qualified employees to work on the renovation... Need skilled people for that.*
- * *May need nursing courses – they burn out.*
- * *Engineering technology; welding; carpentry.*
- * *Maybe teach careers that utilize the Internet, such as medical transcriptions.*
- * *Medical skills – especially technological courses such as radiology, respiratory therapy, etc. There will always be a need for those.*
- * *Business courses, including accounting, marketing, etc.*
- * *Hope one of the (areas of emphasis) would be nursing.*

- * *Computer skills are essential – our staff meets them with apprehension. Also, teacher prep courses are needed, as well as technical teachers for electricity, shop, welding.*

Finally, key business stakeholders see a need to work with local businesses to provide training they need to maintain or augment their workforces. This would include some non-degree training, such as continuing education credits. Businesses seem interested in working with a local higher education presence to coordinate not only curriculum needs but also to share physical space, etc. The following verbatim comments illustrate the thoughts of local employers:

- * *Need continuing education for nurses, administrators and social workers so they needn't go to Columbus. There are enough nursing home administrators in the area for a class or two. Nurses, administrators, social workers, respiratory therapists – all must take 20 to 38 hours of continuing education a year.*
- * *We would consider reimbursing tuition for the right courses – ones needed in our industry.*
- * *Safe Auto could use better educated workers. There is a good work ethic, but many lack skills.*
- * *Would help overcome shortcomings in the pool of potential employees. We have an excellent core group, with good work ethics. If we must expand, we'd be getting to the bottom of the barrel. Would prefer people with previous customer service experience.*
- * *We do our own training of employees as needed, bringing in trainers from another organization. Would be willing to use a facility here if they can meet our needs as they arise. (The needs are intermittent.)*
- * *Our staff would benefit from additional education. As of now, they do Phoenix Online.*
- * *We'd like to require a two-year business degree – put ads in the paper saying that. Can't do it now, as the "pool" isn't big enough in Monroe County.*
- * *We might use the facility for management training, other training and certification courses, if they were offered. Accreditation may not be needed. We don't do tuition reimbursement, but are working on that.*
- * *Would push post-secondary education at our business. We have shifts and could consider shifting things so people could participate.*
- * *We offer tuition assistance to employees. They would take courses if they could schedule it around their work. As of now, colleges in the area are too far away to incorporate into schedules.*
- * *I would like to see something available for businesses. Training sessions at little or no cost, for instance. We could look for federal grants to help with that. Workforce Investment might help with that – Monroe Works. Perhaps MW could fund remedial training or "orientation" training for employees. Nice if they could go on site and offer these services in Monroe County. Great need for the following types of training: customer service, work ethic; work habits, etc.*

Perceived impact of more post-secondary education in the county. While some key stakeholders are very optimistic about the potential positive impacts of a higher education presence in Monroe County, others are skeptical. Some respondents suggest that higher education will only be useful if additional job opportunities are created that will allow Monroe County residents to attain employment in the area. Others argue that leaving the county is not always a bad thing. See the verbatim comments from key stakeholders below:

- * *If we're trying to lure businesses, we need training. Businesses don't expect to find people already trained, but want training available when they get here.*
- * *We need jobs to keep people, and to have jobs we must have a better business base. To get a better base, we must offer training. People will want to stay or return here if there are jobs.*
- * *Will help the image of Monroe County, give students hope, help their self image. These kids are better than they think they are.*
- * *The better educated think better and have more money to handle. We would have better trained people.*
- * *I see more professional young people coming back. The availability of quality education would keep them here.*
- * *We would get more support for the schools and would attract more business and industry... and, more kids would stay here.*

- * I want to see this happen... but education alone won't turn things around. Commissioners and others need to bring business in and education will support it. These two things need to happen together.*
- * Post-secondary education in the county will help turn the economy around, though it may not curb the out migration. Also, we need continuing education for adults. That's the real economic impact.*
- * In the schools, it would raise achievement; create opportunities for kids; increase collaboration between the district and universities.*
- * Better education would help decrease the population out migration.*
- * There is an advantage for our students going outside the county. They are exposed to diversity, of which there is little in the county. There is a mindset that they can not be successful anywhere but in the county. Going outside helps shed this attitude.*
- * Many here do go off to college. There are many educated people here. Problem is getting them to stay here for their education. Must have jobs that align with education.*

V. Research Results: Random digit dial telephone survey of Monroe County residents

The results of the research steps reviewed prior to this (e.g., historical data and interviews with key stakeholders in the area) begin to define the approximate market demand for post-secondary education in Monroe County. A very important and complementary way to define the market size is to conduct a random-digit-dialed telephone survey of Monroe County households and observe what percentage of households have one or more people in them who are considering or would consider taking a post-secondary course in the near future (i.e., next three years), especially if post-secondary classes were offered in Monroe County. Because of the robustness of random-digit-dialed surveying,⁴⁰ (with some error and slippage, of course) we may then infer potential market demand from households in the sample surveyed to all of the households in the county. This method yields a more rigorous estimate of the market potential for post-secondary education than the other methods discussed.

A caveat: The world in Monroe County, as elsewhere, is dynamic. That is, even as the project was unfolding, the situation was changing. Several changes that could have an effect on market potential for post-secondary education in Monroe County include the following: state funding for higher education, which some feel makes community colleges more desirable; broadband availability that is scheduled to expand in the county; Internet penetration and computer usage; demographic shifts as the population ages; loss of traditional job opportunities; etc. Because of changes like these, an estimate must be regarded as a “snapshot” in time, with inaccuracy increasing as time proceeds.

Key Research Findings – Telephone Survey

- Residents report great positivity toward the general idea of higher education and the specific idea of a higher education center in Monroe County.
- Residents are concerned about the quality of K-12 education in Monroe County and perceive the job preparation received by Monroe County’s high school graduates to be average at best.
- Overall, conservative market estimates indicate relatively weak demand for a higher education center in Monroe County. Demand is highest among younger adults and those with high school education.

TST designed the telephone survey, submitted it to BTC for comments and suggestions, and made revisions as needed. This survey was then pretested by the field service provider, to ensure that questions and question order allowed for a natural flow, questions were easily understood by respondents and the interview could be completed in 15 minutes. Appendix C features the survey questionnaire used for this research. After additional revisions, 600 Monroe County households were surveyed. Throughout the surveying, TST monitored the demographics of the survey respondents and their households to ensure they matched as closely as possible 2000 U.S. Census data for Monroe County. (Further details about the survey methods used, and the demographics of those surveyed, can be found in Appendix D.)

The parameters of the survey were as follows:

- Survey was designed to take 15 minutes on average;
- Random-digit dialing was used, combined with computer-assisted telephone interviewing (CATI);

⁴⁰ Sampling error for N=600 is $\pm 3.9\%$ at the 95% confidence level. The actual error may be larger or smaller for some subgroups, and may vary among questions asked.

- Sampling unit was the household. Within each household a prospective student was interviewed, if one existed. Otherwise, the adult with the “last birthday” was interviewed. This adult is often considered an “influencer,” as those who do not plan to take classes or work toward a degree can have an influence on those who might;
- Two open-ended questions were included;
- Up to 8 attempts were made to survey a selected household (unless the household refused to participate);

The survey explored many issues related to education in general and post-secondary education in particular⁴¹, including:

For potential students:

- Respondents’ plans to take a higher education course – including college courses, additional training or work toward professional certification -- in the next three years;
- Where this respondent might take courses;
- Student status, and whether that status is full or part time;
- Where these courses are now taken;

For all respondents, including potential students:

- Attitudes toward quality K-12 education in Monroe County
- Perceived importance of higher education
- How well prepared Monroe County high-school graduates are to compete for good jobs
- Attitudes toward a Monroe County higher-education center, perhaps in Woodsfield
- Respondent’s and respondent’s household members’ interest in higher-education classes
- (If some level of interest is there) Types of post-secondary courses of interest to respondent
- Use of computer and Internet
- Demographic data for each respondent and/or his/her household

The discussion of survey results begins with an estimation of the market potential, derived from a variety of indicators or questions. This estimation is the focus of this survey, and the other questions are supportive.

a) Estimate of Market Potential

In keeping with the primary purpose of the survey, multiple questions were used to identify those households that contained potential students. The three most important of these included the following:

QC: Let me ask: Is there anyone in your household 16 or older who is planning to take any higher education courses in the next three years? Higher education courses include college courses, additional training or work toward professional certification. (Answer choices: Yes, self; Yes, someone else; No)

Q15: How much would you personally want to take higher education courses at a center in Monroe County, assuming the courses were of interest to you. Would you want to take courses very much, a lot, moderately, a little or not at all?

⁴¹ The full survey questionnaire is included in Appendix C.

Q18. How likely or unlikely are you, personally, to enroll in a course at a higher education center in Monroe County, assuming the courses were of interest to you? Are you very likely, somewhat likely, somewhat unlikely, or very unlikely?

These three indicators (current intention, desire, and likelihood) can be combined in multiple ways, yielding several estimates ranging from most conservative to most liberal. The most conservative estimate could be considered a minimum, baseline estimate for enrollment figures. The liberal estimate could be considered a maximum enrollment goal, if the learning center was conveniently located, affordable, offered just the right mix of courses and was supported by a public awareness campaign. The different estimates strategies are described briefly below.

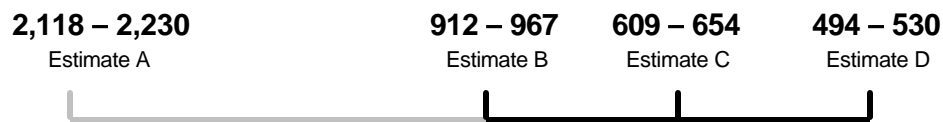
- Estimate A (Most liberal): Prospective students are defined as anyone who says they “very much” or “a lot” want to take courses at a higher education center in Monroe County (in Q15). By looking at those who show desire to attend an education center in Monroe, we begin with the most liberal estimate for potential enrollment.
- Estimate B: Prospective students are defined as those who say they are currently considering taking courses (i.e. “yes” in QC). This estimate represents those residents who currently intend to take courses in the next three years.
- Estimate C: Prospective students are defined as anyone who is currently considering courses in the next three years (i.e. say “yes” in QC) and who want to take courses at a higher education center in Monroe County “very much” or “a lot” (in Q15).
- Estimate D (Most conservative): Prospective students are defined as those who say they are currently considering taking classes in the next three years (i.e. say “yes” in QC) and they would be “very likely” to take courses at a higher education center in Monroe County (in Q18).

The range of potential enrollment figures presented below all follow the same basic estimation strategy.

- o First, information from survey respondents is used to calculate what proportion of households in the sample contain potential students.
- o Then, this proportion is applied to the Monroe County household figures (approximately 6,030 households according to the 2000 U.S. Census) to arrive at a population estimate. This number (the lower bound estimate) assumes one person from each sampled household would enroll at the center.
- o A second number, called the upper bound estimate is also calculated. This number estimates based on the total number of respondents aged 16 and over whom the sampled respondent said would be “very” or “somewhat” likely to enroll in courses at a learning center in Monroe County.

Figure 5 presents a range of estimates (from liberal to conservative) for enrollment in a higher education center in Monroe County. Note: the more conservative estimates are limited to only those planning to take higher education classes or training in the next three years. Overall, between 494 and 2,230 Monroe County residents may enroll in classes at such a higher education center.⁴² Not all of these students would be enrolling at the same time.

⁴² Unless otherwise noted, data are weighted by age and educational attainment to bring the sample into alignment with 2000 Census parameters for Monroe County. Because weighting helps the survey sample more closely resemble the population from which it was drawn, one can have more confidence in the precision of the survey estimates.

Figure 5: Projected enrollment at possible Monroe County higher education center

A detailed table that illustrates the mechanics of calculating each estimate is provided in Appendix E. A number of caveats to this range of estimates are in order. First, how enrollment may be affected by the types of courses offered is not modeled, beyond the fact that for some estimates, respondents were told to assume the center would offer “courses of interest to you.” Second, the estimate does not consider the potential for non-academic uses of a higher education center, such as Monroe County businesses that rent out technically equipped rooms for training sessions or meeting areas. This could play a role in determining the viability of such a center.

b) Perceptions and Attitudes toward Higher Education

In addition to providing market estimates for a higher education center in Monroe County, there were several secondary goals of the telephone survey. These goals included:

- Measuring Monroe County residents’ perceptions of and attitudes toward education, especially post-secondary education;
- Measuring attitudes and enrollment intentions regarding a possible higher education center in Monroe County;
- Gathering information about potential courses of interest as well as other miscellaneous comments that respondents were willing to provide.

The remainder of this report addresses these issues.

Currently, are there any “go-to” institutions of higher learning in Monroe County? That is, are there any institutions that are perceived to be the primary provider of higher education to county residents, and therefore may be best positioned to help with the success of a higher education center, should it be built? To answer this, respondents were asked the following: *To the best of your knowledge, where do people who live in Monroe County generally go for higher-education courses or other classes or training?* This question was asked in an open-ended manner, and multiple responses were allowed with aggregate results shown in Table 6. Overall, a majority of those surveyed say “Belmont Technical College.” (Indeed, when one looks at just the first response to this question, Belmont Technical College is mentioned 45% of the time, followed by Ohio University Eastern at 12% and West Virginia Northern Community College at 7%).

Table 6: Perceptions of where Monroe County residents go for higher education

Perceptions of where Monroe County residents generally go for higher education (584 responding)		
	#	%
Belmont Technical College	350	60%
Ohio University Eastern	196	34%
West Virginia Northern Community College	104	18%
Marietta College	102	17%
Washington State Community College	50	9%
West Liberty State College	46	8%
Ohio State University	41	7%
Wheeling Jesuit University	31	5%
Ohio University (Athens)	25	4%
Bethany College in West Virginia	12	2%
Muskingum College	7	1%
Youngstown State University	6	1%
Franciscan University of Steubenville	1	0%
Other (Specify)	92	16%
Don't know	91	16%

After responding to the question about where people in Monroe County go for higher education, respondents were asked, "Why do you think they go there/those places?"

There is a strong pattern among the many verbatim responses to this question. When referring to BTC and OUE, most respondents mention what have become recognized as the core attributes of community and two-year colleges: proximity, affordability, and ease of getting in -- what is often referred to as access. When respondents are referring to larger or four-year schools, they are more likely to mention the curriculum that is available at these larger places. Typical comments include:

- *I think they like Belmont Tech because it is close to home, and a lot of people from Monroe County don't venture far. My daughter went to Ohio State because she wanted to study agriculture. She wanted to get her (preferred) course of study. Well, another reason would be financial. Belmont Tech doesn't cost as much. Unless students get scholarships, it's hard for students to get into private schools.*
- *Because there is no higher education facility available closer. Belmont Tech students get free tuitions from the county. If you live in the county. Ohio Eastern students can live at home and commute, which would cut down on costs.*
- *It's the closest around here. If they're not going to leave the area, it's the only college available. But a lot of people go to Columbus State and Ohio State, if they're moving from home.*
- *Proximity. It matters for how close it is, for driving, and what they have available. Belmont Tech -- right after school, you can get free programs. Since you're not on campus, (at OUE) it's a lot cheaper to go to the eastern branch, not campus. You drive home, sleep at home.*
- *Because it's close, and they can stay at home. And economically, that's all that they can do.*

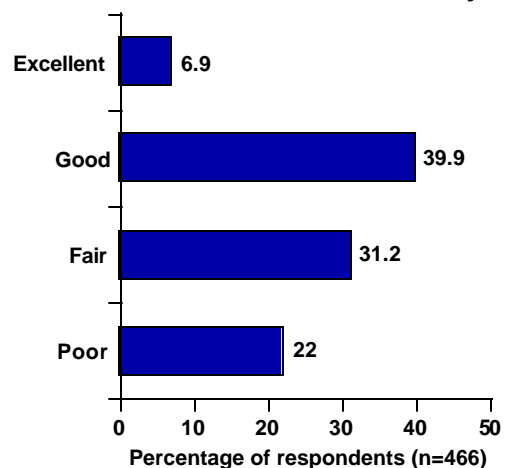
- *It doesn't cost as much. It's cheaper for them to drive back and forth. You don't have to pay room, and board. Belmont has an excellent college. Both of my daughters went there, and they are both excellent in their fields.*
- *Ohio State, because of what they're offered there and what they're majored in.*
- *Because it is closer to home, and the curriculum is better at Belmont Tech and West Virginia Northern.*
- *Because it is so close. Most of the students want to live at home, rather than on campus. At tech, they have a trustee township scholarship, and have the first two years tuition paid.*
- *Because they are close. Price, also. Because most of the people have family, and they don't want to go away. Either parents or children, they don't want to leave them. And this county is a poor county.*
- *Close to home, easy to get in to.*

Post-secondary education can not and does not exist in a vacuum. As indicated by the literature review (discussed earlier), those who want to succeed in higher-education courses must be prepared and motivated. With this in mind, participants were asked:

How would you rate the current quality of education in Monroe County for children in Kindergarten through the 12th grades? Would you say the quality of education is excellent, good, fair, poor or don't you know?

As shown in Figure 6, a majority of Monroe County residents perceive the current quality of K-12 education as “fair” or “poor” (53.1%), with 6.9% saying excellent. (Note: The 118 participants who reported “Don’t know” to this question are not included in Figure 6.)

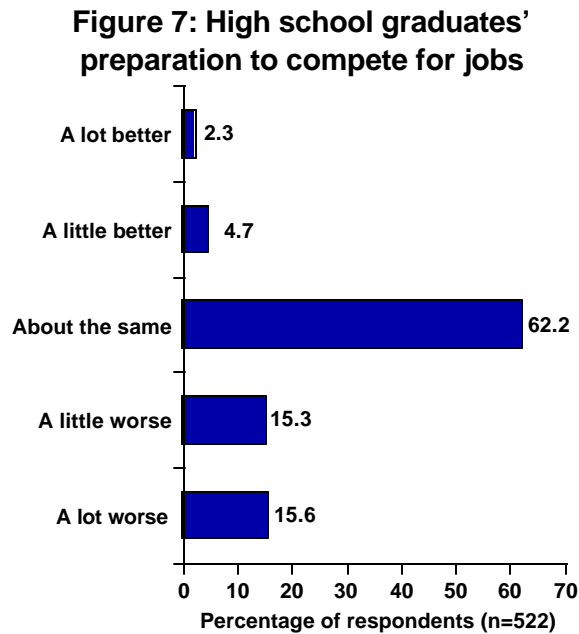
Figure 6: Perceptions of the quality of K-12 education in Monroe County



Relatedly, participants were asked to comment on the quality of the education Monroe County’s high school students receive. Specifically, they were asked to comment on how well prepared these high school graduates are to compete for good jobs. Participants were asked the following:

In general, how prepared are Monroe County’s high school graduates to compete for good jobs with other high school graduates? Would you say they are better prepared, worse prepared or prepared about the same as others? [IF BETTER OR WORSE] and is that a lot or a little better/worse prepared?

As shown in Figure 7, the majority of participants (62.2%) perceive Monroe County’s high school graduates prepared “about the same” as other high school graduates. Only 7% say Monroe County’s high school graduates are prepared “a lot” or “a little” better than others, according to those surveyed. (Note: The 63 participants who reported “Don’t know” to this question are not included in Figure 7.)



Participants were also asked to indicate how important they think higher education – that is education after high school – was to both the people of Monroe County and to the participant and his/her family. On a five-point scale where 1 is not important and 5 is very important, respondents said the following:

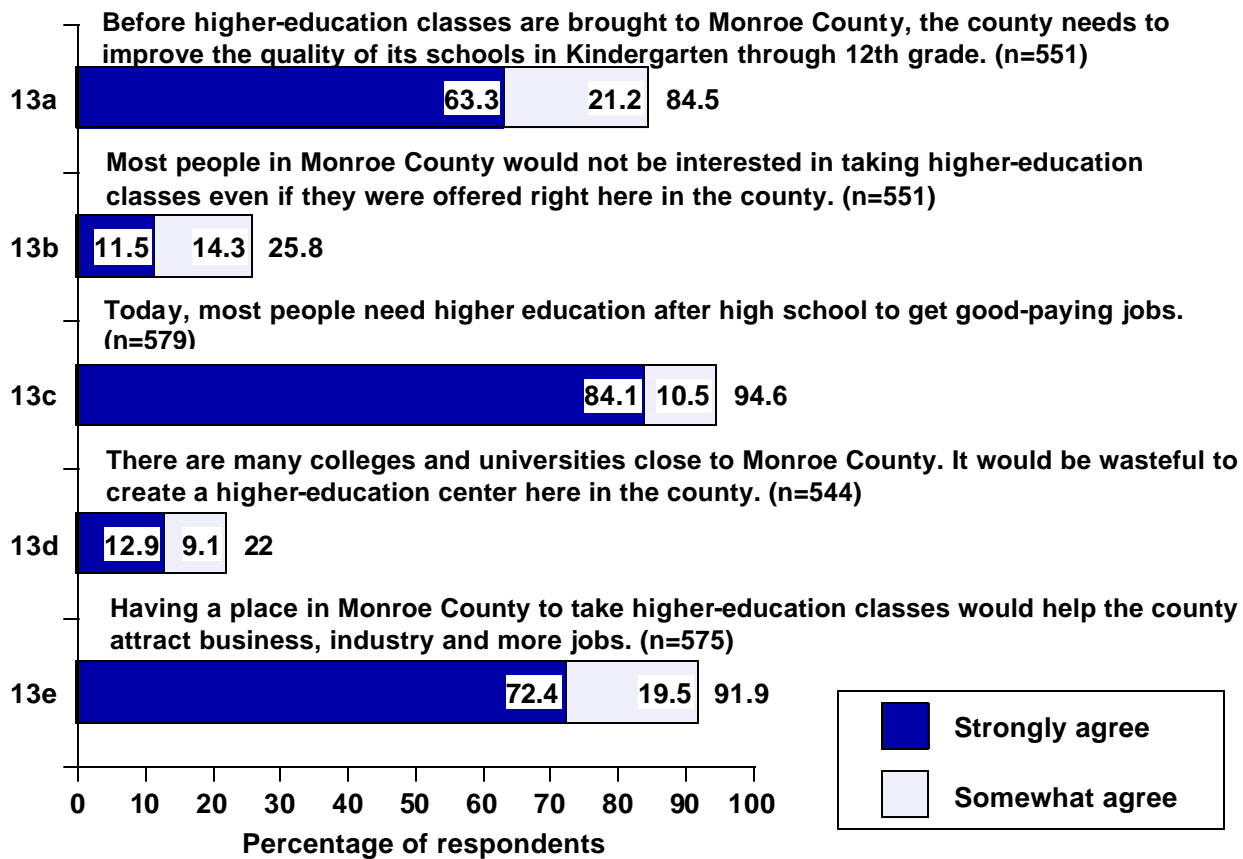
- How important is higher education to the people of Monroe County? Among those who answered the question, the average response was 4.49. Overall, 394 participants or 68.1% said higher education was “very important” to the people of Monroe County.
- How important is higher education to the participant and members of his/her family? Among those who answered the question, the average response was 4.47. Overall, 411 participants or 71.6% said higher education was “very important” to themselves.

c) Perceptions of a Higher Education Center in Monroe County

As Belmont Technical College and the Monroe County commissioners consider a possible higher education center in the county, they must have an in-depth understanding of residents' opinions regarding this issue. What messages or issues may help make such a center successful? What messages or issues may be barriers to the success of such a center? These opinions – either pro or con – can guide the decision whether or not to locate a center in the county. With this in mind, respondents were presented with a series of randomly ordered agree-disagree statements. These statements – and the percentage of those who said they “somewhat” or “strongly agree” to each – are shown in Figure 8.⁴³

⁴³ Note: Respondents were also given the opportunity to provide the following responses: “in between,” “somewhat disagree,” and “strongly disagree.” For presentation purposes, these data are not shown here.

Figure 8: Attitudes toward a possible higher education center



From Figure 8, it is clear a majority of Monroe County residents believe most people need higher education to get good-paying jobs (94.6%) and that a place to take higher education classes could help the county develop economically (91.9%). However, about a quarter of the respondents believe most Monroe County residents would not be interested in taking higher education classes even if they were offered in-county (25.8%), while 22% believe it would be wasteful to create a higher education center in the county.

From a big picture perspective, a majority of Monroe County residents believe the county needs to improve the quality of its K-12 schools before higher education classes are brought to the county. These beliefs may relate to the perceived quality of K-12 schools and the preparation high school graduates get from Monroe County schools, which were discussed earlier. (Indeed, those who perceive the quality of the Monroe County’s K-12 educational system to be “fair” or “poor” are more likely to agree with this statement that this educational system must be fixed before higher education enters the county, $r = -.23, p < .05$).

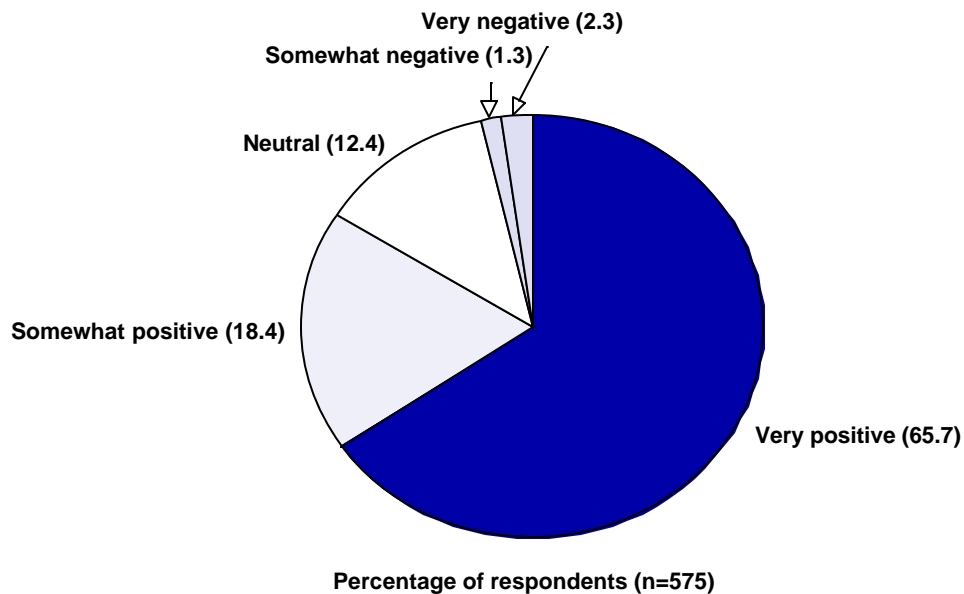
After responding to this series of agree-disagree statements, participants were asked for their overall attitude toward a possible higher education center in Monroe County. Participants were asked:

As you may have heard, there is some discussion about a higher-education center being created in Monroe County, perhaps in Woodsfield. This center would offer high-tech classrooms and a variety of courses, perhaps taught by faculty from a mix of colleges and universities here in eastern Ohio. Overall, is your opinion toward a

possible higher-education center in Monroe County positive, negative, or doesn't it matter to you one way or another? [IF POSITIVE / NEGATIVE] And is that very or somewhat (positive/negative)?]

As shown in Figure 9, the majority of those interviewed feel very or somewhat positive toward such a higher education center (84.1%).

Figure 9: Overall attitude towards a higher education center in Monroe County



Respondents were asked if they had any other comments about a possible higher-education center in Monroe County. Most did, and they were generally very positive toward the center. They said it would make higher education more accessible for the county's younger people, helping keep them at home. Also, they expected a center to help the county economy, creating businesses and jobs and attracting people other than retirees to the area. While most of the comments were positive, a minority of them expressed concerns.

There were concerns about the poor quality of education in grades Kindergarten through 12. Many felt this issue needed to be addressed first. There were also concerns about the poor quality of the roads and other amenities. Comments illustrating these thoughts include:

- *I just think it would be very helpful. I'm thinking about how economically depressed we are now. It would be very convenient.*
- *I think that a higher education site would definitely be an improvement. Keep the young people here, make more jobs. (We) lose some to other counties. May bring more jobs. I think it would be a good idea, with it being local. I would suggest more people would probably go to college.*
- *It would be a pretty good idea. It will help keep more graduates, and more people here in the county. Instead of moving away.*
- *I've always been a supporter of education, at all levels. I would like to see it improve, because it would bring a better economy. Because it would attract more people to the area, other than retirement people.*

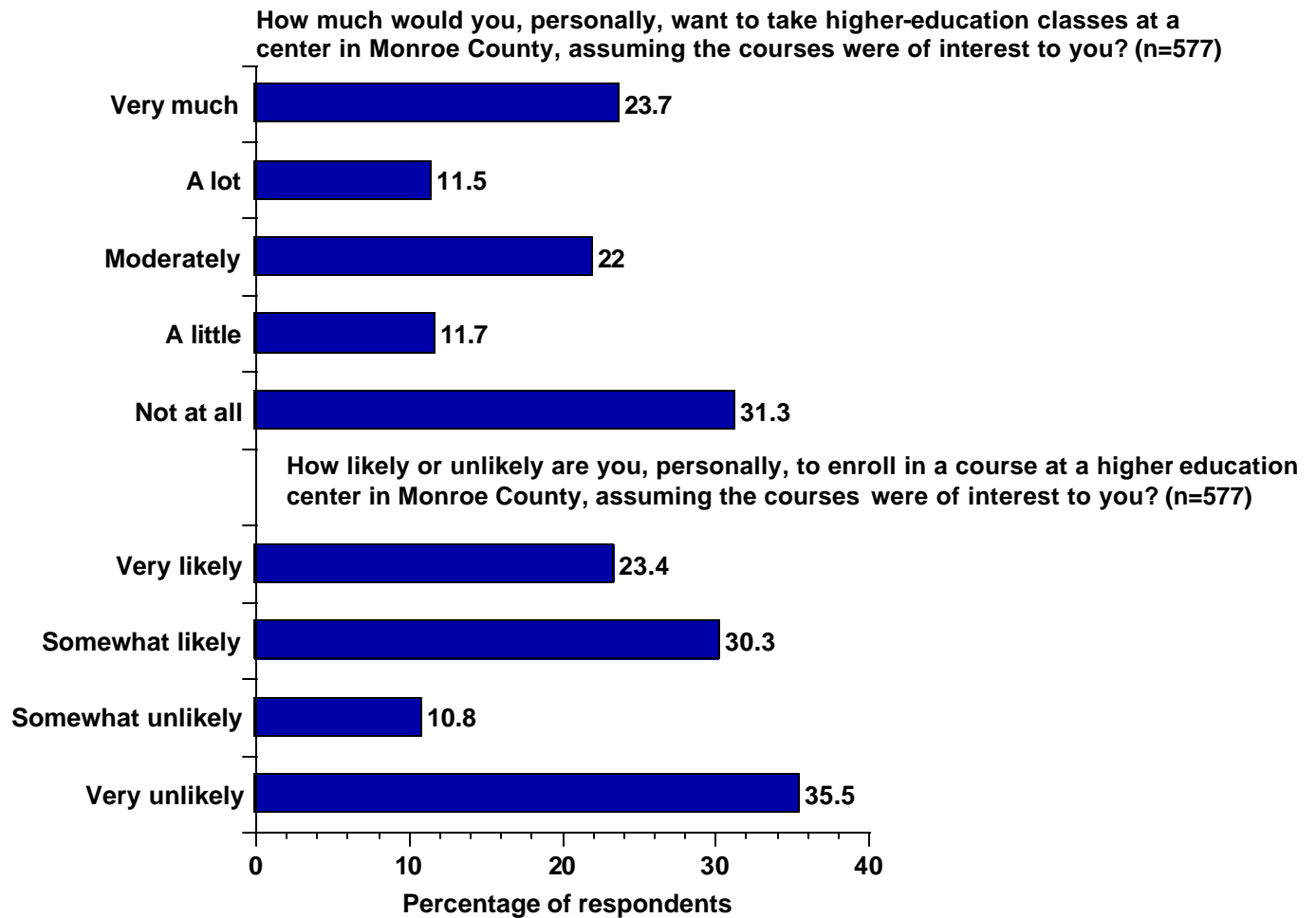
- *They need to have courses that are going to be helpful for the economy around here, that will train the people for the jobs in this area. I know, because I'm working as an electrician. There is a lack of electrical workers in this area.*
- *I guess if the commissioners want to bring a higher education facility to Monroe, they better bring other jobs and better roads first.*
- *Maybe that the schools in Monroe County, they need better schools. When the kids from Monroe County go to college, there's a lot of things they haven't had as subjects, and they have to get them in college.*
- *I don't need it, but I would give my fair share of taxes to children's education. But I don't need it.*
- *They need to work on the school system now. There are kids who come in for their driver's license who can't spell their first name, or write in cursive.*
- *In the future, it could be a great benefit. But I don't think it's a number one priority that the commissioner should be focusing on. There are other issues in the county that they should focus on. Water being number one. And grocery stores. The only one we have in the county is in Woodfield. That's why we go to West Virginia. We have to pay food tax, and that's why we do a lot of our business in West Virginia.*

d) Desire and Intention to Enroll in a Higher Education Center in Monroe County

In a survey such as this, it is relatively easy (and perhaps socially desirable) to say one supports higher education generally and a higher education center specifically. To help estimate the market potential for a higher education center in Monroe County, respondents were asked to report 1) their desire to take higher education classes at a center in Monroe County and 2) their likelihood to personally enroll in a course at a higher education center in Monroe County. Responses to these questions are shown in Figure 10.

With both questions, about a quarter of those surveyed (appx 23%) said they would “very much” want to take higher-education classes at a center in Monroe County or would be “very likely” to enroll in a course at such a center. (Interestingly, 81 respondents – or 14.1% of all those interviewed - said both “very much” and “very likely” to both of these questions.)

Figure 10: Desire and intention to enroll in a higher education center in Monroe County



Comments of those who said they would be very likely to attend a higher-education center in Monroe County were tabulated and analyzed. The reason for focusing on this group is simple: these are the people targeted in the market potential estimates reviewed earlier and it may be critical to understand their motivations if a higher-education center is created in Monroe County. Their results are shown in Table 7.

Table 7: Reasons respondents would be very likely to enroll

Reason	Number of responses
Access – including convenience, saving travel time and expenses, ability to continue working and taking classes and having face-to-face educational experiences	75
Professional advancement and self improvement – for a variety of reasons: to get a better job and/or earn more; improve my technical skills; keep up with needed certifications; continuing education; be a more interesting person.	73
Classes of interest – if a variety of these are offered	15
Help the area economically – by developing jobs and businesses in the county	13
Help our kids in life – as well as everyone else	6
Personal love of learning	6

As has been shown in other studies of community college students, they live busy, complex lives, frequently juggling family, jobs, education and other interests.⁴⁴ The closer higher education is to where they live and work, the more likely it is to be pursued. Thus, access is critical for them. It is no surprise, then, that access tops the list of reasons listed in Table 7.

An equally important motivation is professional advancement and self improvement, as defined in a variety of ways. A minority of respondents volunteered that a variety of classes would be attractive to them, especially those that develop technical or computer skills. Some thought a center would benefit the economics of the area as well as the children of Monroe County.

Comments of those who said there would be very unlikely to attend a higher-education center in Monroe County were also tabulated and analyzed. The reason for focusing on this group is to identify barriers, if any, to the success of a higher-education center, should it be created. As respondents' tallied responses in Table 8 show, the dominant barriers are age and declining or poor health, not resistance to or lack of interest in higher education. As has been discussed previously in this report, Monroe County's population is aging, and these responses show the effects of that fact. In spite of their situation, however, many older respondents did state that a higher-education center might help the children of the area as well as the economy. A few even said their interest would be piqued if the classes were just right.

⁴⁴ Snyder, Karen C. and Orie V. Kristel. January, 2003. "Report to Columbus State Community College: Issues Concerning a Possible Second Campus." The Strategy Team.

Table 8: Reasons respondents would be very unlikely to enroll

Reason	Number of responses
Age, retired status – Many respondents older than 60 said their age limited both their interest and their need to take classes.	143
Health issues -- As would be expected among an older, poorer rural population, health reasons were present.	29
No reason, no interest – including not needing any more education	30
Already am college educated	23
Job schedule, time available prohibits it	6
Can't afford it	9

What else is known about those who are “very” or “somewhat” likely to enroll?

- **Willingness to pay for higher education courses.** Do these positive intentions correlate with how much participants are willing to pay for higher education courses? That is, are those respondents who say they are “very likely” to enroll in a course willing to spend money and invest in this course of action? Participants were asked:

Many higher-education courses are four-credit hour courses that meet at least twice a week for a quarter. If you were to consider taking a four-credit-hour course, how much would you be willing to pay for it?

Of the 584 participants that responded to this question, 359 (or, 61.5%) said they “Didn’t know” and were unable to provide a response. Among the remaining 193 surveyed, the average amount they would be willing to pay (WTP) was \$607 and a median WTP of \$300. Focusing on the 66 potential students who said they would be “very likely” to attend and who answered this question, responses were lower: the average WTP was \$488 and the median WTP was \$211.

- **Potential areas of study.** The 310 respondents who said they would be “very” or “somewhat” likely to enroll in courses at a higher education center were asked a follow-up question – what types of courses might be of interest? Respondents were allowed to provide up to three responses – the results to these questions are shown in Table 9.

Table 9: Potential areas of study

Area of study (n = 310)	#	%
Computer science	86	28%
Health-care related	84	27%
Business / accounting	56	18%
Law / medicine	44	14%
Education	31	10%
Engineering	30	10%
Arts and sciences	21	7%
Automotive / vocational	16	5%
Psychology / history / political science	15	5%
Fine arts	14	5%
Performing arts	5	2%
Other (Specify)	59	19%
Don't know	25	8%

As reviewed earlier, the percentage who say they would be “very likely” to take a higher education course at a center in Monroe County location may represent a more liberal market estimate, as it is asked at a point in the survey when respondents have become more knowledgeable of what a higher education center could offer as well as the positives and negatives of such a center. A more conservative market estimate, on the other hand, would be one that considers only those who entered the survey already possessing a prospective student mindset – who at the beginning of the survey already feel they will enroll in a course in the next three years (i.e., Estimate D).

As the demographic tables in Appendix D show, one can paint a broad picture of these prospective students. Are any demographic variables statistically linked with one’s self-identification as a prospective student who plans to enroll in classes in the next three years?

To answer this question, a statistical analysis called binary logistic regression was used. A variety of demographic variables (age, employment status, educational attainment, sex, whether there is a computer in the household, whether anyone in the household is receiving non-Medicare public assistance, and travel time in minutes from Woodsfield). Overall, few statistically significant relationships were observed, with the exception of the following. Compared to non prospects, prospective students have greater odds of:

- Having a less than high school education or a high school education;
- Being in a younger age category.

In other words, those Monroe County residents who have less formal education or who are relatively young are more likely to report they plan to enroll in higher education courses in the next three years.

Among the 89 respondents who said (at the beginning of the survey) they are planning to enroll in higher education courses in the next three years:

- Over half (57%) are planning to enroll as full-time students;

- Over a third (36%) are currently taking higher education courses.⁴⁵ These 32 respondents are enrolled at the following institutions;
 - Belmont Technical College (n=10, or 30%);
 - Washington State Community College (n=3, or 8.3%);
 - West Virginia Northern Community College (n=3, or 8.3%);
 - Ohio University Eastern (n=2, or 6.3%);
 - Wheeling Jesuit University (n=1, or 3%)
 - Other (n=20)

⁴⁵ Of the 584 respondents for whom data is available, 22 (or, 3.8%) are a full-time student and 10 (1.7%) are a part-time student.

Appendix A: Discussion Guide for Key Stakeholder Interviews

Belmont Technical College / Monroe County Research Project Discussion Guide for Key Stakeholder Interviews

Interviewer needs to be familiar with the following information on Belmont County:

- Current population, total
- Population trends since 1850
- Population of 18 to 34 year olds
- Education stats for area, (# of high schools, % who take post-secondary courses, etc)
- Income stats for area
- Map of BTC service area and existing facilities
- BTC enrollment trends, by county
- What if any role this interviewee has had in previous discussions about higher education in Monroe County.

1. Thanks for making time for this interview. First, give me your perceptions of Monroe County.
2. Briefly, what do you know about Belmont Technical College?
3. Tell me what you know or have heard about postsecondary education needs in Monroe County. [By post secondary, I mean education beyond high school including college courses as well as business and industry training courses.]
Probes:
 - For potential students?
 - For employers?
4. To the best of your knowledge, how are these needs currently being met?
Probes:
 - What entities are supplying these needs?
 - Which needs are being met within the county? How?
 - For which needs must people and employers go outside the area?
 - What are the advantages of going outside the county?
 - And the disadvantages?
5. Knowing the area as you do, what additional educational opportunities, if any, do you think are desirable to meet the needs of Monroe County's individuals, organizations and businesses?
6. When you first heard of the idea of higher education in Monroe County, what was your initial reaction to the idea?
7. And, what are your hopes concerning the possibility of higher education in Monroe County?
Probes:
 - Who or what stands to gain, if a Monroe County facility is created?
 - Do you believe higher education presence might help "turn things around" in Monroe County? Why?
 - Do you believe more residents of Monroe County would choose to stay in the County if there was a higher education presence here? Why?
8. What are your concerns when you think about that possibility?
Probes:
 - Who or what stands to "lose" if it built? That is, what are the downsides of higher education in Monroe County.

9. How do you think these concerns should be addressed?
10. What do you see as the impact on [interviewee's organization] if a new higher education presence is created in Monroe County? How about the impact on other entities such as [mention organizations of other interviewees]?
11. What other considerations should BTC take into account?
12. How do you think the student body, the courses and possibly the degrees offered in Monroe County would look like?
13. Many education funds, such as those that would be used to build a Monroe County facility, would come from the state budget. As such, higher education is a steward of public money and must be sure there is public input. It must also be as sure it is addressing current and future educational needs. A facility cannot be built in Monroe County simply because it would be nice to have a facility there.

The question I have for you is this: If there is a decision to pursue higher education in Monroe County, what can help ensure the facility and classes offered are well utilized and meet local needs?

Probes:

- With whom is it critical to speak?
 - How can a higher education presence best integrate itself into the fabric of the community so it is aligned with needs?
14. What about declining population in Monroe County? If that trend continues, what are the implications for higher education?
 15. What about interest in higher education in Monroe County? Is it there now? If not, how can it be fostered?
 16. What other questions do you have about this issue? I may be able to answer some, but I will get back to you with answers I don't have.
 17. [If needed] Knowing what you know now, would you support or oppose a new higher education facility in Monroe County, or would you recommend something else?
 18. What would make you [support/oppose – give opposite view expressed in previous question] a higher education facility for Monroe County?
 19. [Supporters only] If a Monroe County facility is created, what would you and your organization be willing to do to help ensure its success? The most important measure of success, of course, is growing enrollment.

Appendix B: Additional Comments from Key Stakeholder Interviews

1. Key Stakeholders impressions of BTC

Respondents ranged from very familiar to only a little familiar with BTC, with most being somewhat familiar. Those with a good deal of familiarity felt it was well established, well run, has nice facilities and good programs. The president was cited as being active in Monroe County, and the college was praised for its trustee scholarships and good working relationship with Ohio University Eastern (OUE).

About half were aware that BTC offers limited courses at the local high school (Monroe County High) outside Woodsfield, a fairly central location in the county. There were negative perceptions among several of the interviewees about offering college courses at a high school – “*It still feels like a high school, not college.*”

Other perceptions of BTC include:

- * *It has a place in the educational system for those who can't or don't want to leave. Provides education at an economical price and is apropos for this area – people are likely to be able to use two-year degrees here locally. Facilities there used for a multitude of purposes – dance lessons, economic development meetings, etc.*
- * *Two-year institution offering different degrees or certifications. Similar to Washington State Community College in Washington County. Have some evening classes.*
- * *They have provided electrical training programs for us. (We get this from WCCC, too.) Work with business and industry to increase Perkins grants.*
- * *Nice physical facility, nice people. People who have gone there like it.*
- * *My gut feeling is that there is not an advantage for BTC to expand higher education into MC. They don't have to do a lot to get our students (to come to them)..*
- * *There is an increasing need for technical training. BTC seems interested in providing quality solutions.*
- * *BTC and OUE are excited about higher education, but is not an advantage for them to come to Monroe County. It's inconvenient and costly for them to come here.*

2. Stakeholders concerns regarding higher education in Monroe County

- * *No one would lose except those individuals who want to control others, especially the less educated. This county is 20 years behind. More education would reduce that situation.*
- * *With more education, the only loser is the one who doesn't take advantage of it. I would hate to see a facility here go to waste. The people need to want it.*
- * *Our county commissioners do not cooperate fully with the schools. Cooperation is needed for economic development.*
- * *TANF guy brought money to county, and there are some new jobs because of it – but there were many problems, too.*
- * *Who loses? The good ol' boys lose power. The winners must be the people and the economy. We will be swallowed regionally if we don't get our act together. Our Swiss/German heritage would not let that set well with us.*
- * *There is no strategic planning for the county – we need it.*
- * *Industry and government must buy in. Many think a facility here is a means to an end. I'm not so sure. We may be setting BTC up to fail. Some people are disingenuous – trying to pass the buck on this issue. Want an excuse.*
- * *Must communicate over and over that BTC or a higher-education conglomerate is coming to Monroe County. Must tell it at all venues – football games, Know Show, etc.*
- * *The county is in the red and I believe we're maxed out regarding unvoted taxes. We're losing funds for economic development – TANF funds that were used are drying up. Maybe Buckeye Hills, ODJFS and GMN can help fund this effort.*

Appendix C: Belmont Technical College RDD Survey

Hello. This is _____. I'm calling on behalf of the Monroe County Commissioners about issues important to Monroe County residents. This is not a sales call. We are only interested in your opinions, and all of your responses are anonymous. First, let me ask: Am I speaking to an individual in the household who is 16 years of age or older? [If YES, continue. If no, ask for an individual 16 or over.]

[When individual comes to phone or is on the phone]

- A. Is this household located in Monroe County?
- | | |
|-----------------|-------------|
| 1. Yes | [GO TO B] |
| 2. No / DK / RF | [TERMINATE] |
- B. And, what is the zip code of this household?
1. 43716
 2. 43747
 3. 43752
 4. 43754
 5. 43757
 6. 43773
 7. 43786
 8. 43788
 9. 43789
 - 10. 43793 [Most frequent zip]**
 11. 43914
 12. 43915
 13. 43931
 14. 43942
 15. 43946
 16. 45734
 17. 45745
 18. 45767
 19. DK/Not sure
 20. Other (TERMINATE)

[Confirm Monroe County area zip code, TERMINATE ALL OTHERS]

- C. Let me ask: Is there anyone in your household 16 or older who is planning to take any higher education courses in the next three years? Higher education courses include college courses, additional training or work toward professional certification.
- | | |
|----------------------|----------------------------|
| 1. Yes, self | [PROSPECT: SKIP TO 1] |
| 2. Yes, someone else | [PROSPECT; CONTINUE TO C1] |
| 5. No / DK | [GO TO D] |
| 6. RF | [TERMINATE] |

Important Note: If PROSPECT in HH does not want to complete the survey, terminate household's participation and track with relevant disposition code (Term – Prospect).

- C1. We need to speak with that person. Is he or she available right now?
1. Yes (Get on phone and start from beginning)
 2. No (Obtain name and callback information. Start from beginning)
 3. RF (TERMINATE, BEING SURE YOU ASSIGN CORRECT "PROSPECT" DISPOSITION CODE)

- D. That's OK. We also need to speak with others who aren't planning on taking higher education courses. How many individuals, including yourself, live in this household?
- a. One, me [SKIP TO 7]
 - b. _____ [INSERT NUMBER OF HOUSEHOLD RESIDENTS]
- E. And how many of those individuals, including yourself, are 16 years of age or older?
- a. _____ [INSERT NUMBER OF RESIDENTS 16 OR OLDER]
- F. So I know whom to interview, think about the birthdays of the [INSERT NUMBER FROM ABOVE] individuals in your household who are 16 or older. Who most recently had a birthday?
1. Me [SKIP TO 7]
 2. Someone else [CONTINUE]
 3. DK/RF [TERMINATE]

May I speak to him/her please?

[IF R IS AVAILABLE, BEGIN AGAIN AT A]

[IF R IS NOT AVAILABLE, SCHEDULE CALLBACK]

STUDENT AND PROSPECT

1) How likely are you to enroll in college courses, take additional training or work toward professional certification in the next three years? Would you say you are very likely, somewhat likely, somewhat unlikely or not likely at all to take a higher education course like those just mentioned in the next three years?

- | | |
|----------------------|-------------|
| 1. Very likely | [CONTINUE] |
| 2. Somewhat likely | [CONTINUE] |
| 3. Somewhat unlikely | [SKIP TO 4] |
| 4. Very unlikely | [SKIP TO 4] |
| 98. DK | [SKIP TO 4] |
| 99. RF | [SKIP TO 4] |

2) Where do you plan on taking higher education courses? (DO NOT READ RESPONSE OPTIONS)

1. Belmont Technical College
2. Bethany College in West Virginia
3. Franciscan University of Steubenville
4. Marietta College
5. Ohio University Eastern
6. Washington State Community College
7. West Liberty State College (in West Virginia)
8. West Virginia Northern Community College (New Martinsville Campus)
9. Wheeling Jesuit University (in West Virginia)
10. Youngstown State University
11. Other: Specify: _____
12. Don't know

2a) Any other places? (DO NOT READ RESPONSE OPTIONS)

1. Belmont Technical College
2. Bethany College in West Virginia
3. Franciscan University of Steubenville
4. Marietta College
5. Ohio University Eastern
6. Washington State Community College
7. West Liberty State College (in West Virginia)
8. West Virginia Northern Community College (New Martinsville Campus)
9. Wheeling Jesuit University (in West Virginia)
10. Youngstown State University
11. Other: Specify: _____
12. Don't know
13. No (SKIP TO Q3)

2b) Any other places? (DO NOT READ RESPONSE OPTIONS)

1. Belmont Technical College
2. Bethany College in West Virginia
3. Franciscan University of Steubenville
4. Marietta College
5. Ohio University Eastern
6. Washington State Community College
7. West Liberty State College (in West Virginia)
8. West Virginia Northern Community College (New Martinsville Campus)
9. Wheeling Jesuit University (in West Virginia)
10. Youngstown State University
11. Other: Specify: _____
12. Don't know
13. No

- 3) And would you be a full time or part time student?
1. Full time
 2. Part time
- 4) Are you currently taking any higher education courses?
1. Yes [CONTINUE]
 2. No [SKIP TO 7]
 3. DK/RF
- 5) Where are you now taking these college courses? (DO NOT READ RESPONSE OPTIONS)
1. Belmont Technical College
 2. Bethany College in West Virginia
 3. Franciscan University of Steubenville
 4. Marietta College
 5. Ohio University Eastern
 6. Washington State Community College
 7. West Liberty State College (in West Virginia)
 8. West Virginia Northern Community College (New Martinsville Campus)
 9. Wheeling Jesuit University (in West Virginia)
 10. Youngstown State University
- Other: Specify: _____

- 5a) Any other places? (DO NOT READ RESPONSE OPTIONS)
1. Belmont Technical College
 2. Bethany College in West Virginia
 3. Franciscan University of Steubenville
 4. Marietta College
 5. Ohio University Eastern
 6. Washington State Community College
 7. West Liberty State College (in West Virginia)
 8. West Virginia Northern Community College (New Martinsville Campus)
 9. Wheeling Jesuit University (in West Virginia)
 10. Youngstown State University
 11. Other: Specify: _____
 12. Don't know
 13. No (SKIP TO Q6)

- 5b) Any other places? (DO NOT READ RESPONSE OPTIONS)
1. Belmont Technical College
 2. Bethany College in West Virginia
 3. Franciscan University of Steubenville
 4. Marietta College
 5. Ohio University Eastern
 6. Washington State Community College
 7. West Liberty State College (in West Virginia)
 8. West Virginia Northern Community College (New Martinsville Campus)
 9. Wheeling Jesuit University (in West Virginia)
 10. Youngstown State University
 11. Other: Specify: _____
 12. Don't know
 13. No

- 6) Are you a full time or part time student?
1. Full time
 2. Part time

[ALL PARTICIPANTS ANSWER]

7) To the best of your knowledge, where do people who live in Monroe County generally go for higher-education courses or other classes or training? (DO NOT READ RESPONSE OPTIONS)

1. Belmont Technical College
2. Bethany College in West Virginia
3. Franciscan University of Steubenville
4. Marietta College
5. Ohio University Eastern
6. Washington State Community College
7. West Liberty State College (in West Virginia)
8. West Virginia Northern Community College (New Martinsville Campus)
9. Wheeling Jesuit University (in West Virginia)
10. Youngstown State University
11. Other: Specify: _____
12. DK [SKIP TO 9]
13. RF [SKIP TO 9]

7a) Any other places? (DO NOT READ RESPONSE OPTIONS)

1. Belmont Technical College
2. Bethany College in West Virginia
3. Franciscan University of Steubenville
4. Marietta College
5. Ohio University Eastern
6. Washington State Community College
7. West Liberty State College (in West Virginia)
8. West Virginia Northern Community College (New Martinsville Campus)
9. Wheeling Jesuit University (in West Virginia)
10. Youngstown State University
11. Other: Specify: _____
12. Don't know
13. No (SKIP TO Q8)

7b) Any other places? (DO NOT READ RESPONSE OPTIONS)

1. Belmont Technical College
2. Bethany College in West Virginia
3. Franciscan University of Steubenville
4. Marietta College
5. Ohio University Eastern
6. Washington State Community College
7. West Liberty State College (in West Virginia)
8. West Virginia Northern Community College (New Martinsville Campus)
9. Wheeling Jesuit University (in West Virginia)
10. Youngstown State University
11. Other: Specify: _____
12. Don't know
13. No

8) And why do you think they go there/those places?
[Open-ended response]

9) How would you rate the current quality of education in Monroe County for children in Kindergarten through the 12th grades? Would you say the quality of education is excellent, good, fair, poor or don't you know?

1. Excellent
2. Good
3. Fair
4. Poor
5. DK – no kids in school
6. DK
7. RF

10) On a scale of 1 to 5, where 1 is not important and 5 is very important, how important do you think higher education – that is, education after high school -- is to the people in Monroe County? You may use 1, 5 or any number in between.

_____ [INSERT NUMBER 1 TO 5]

1. DK
2. RF

11) On the same scale of 1 to 5, where 1 is not important and 5 is very important, how important is higher education to you and members of your family?

_____ [INSERT NUMBER 1 TO 5]

1. DK
2. RF

12) In general, how prepared are Monroe County's high school graduates to compete for good jobs with other high school graduates? Would you say they are better prepared, worse prepared or prepared about the same as others? [IF BETTER OR WORSE] and is that a lot or a little better/worse prepared?

1. A lot better
2. A little better
3. About the same
4. A little worse
5. A lot worse
6. DK
7. RF

13) Now I am going to read some statements to you and I want you to tell me whether you agree or disagree with each one. The first / next is...

[GO TO FIRST ITEM IN RANDOMIZATION, THEN READ PROBE AFTER EACH STATEMENT]

(RANDOMIZE)	ASt	ASm	IB	DSm	DSt	DK	RF
a. Before higher-education classes are brought to Monroe County, the county needs to improve the quality of its schools in Kindergarten through 12 th grade.	1	2	3	4	5	8	9
b. Most people in Monroe County would not be interested in taking higher-education classes even if they were offered right here in the county.	1	2	3	4	5	8	9
c. Today, most people need higher education after high school to get good-paying jobs.	1	2	3	4	5	8	9
d. There are many colleges and universities close to Monroe County. It would be wasteful to create a higher-education center here in the county.	1	2	3	4	5	8	9
e. Having a place in Monroe County to take higher-education classes would help the county attract business, industry and more jobs.	1	2	3	4	5	8	9

(PROBE) Do you agree or disagree with that statement, or are you somewhere in between?

(IF "AGREE" OR "DISAGREE") And, do you (agree / disagree) strongly or somewhat?

14) As you may have heard, there is some discussion about a higher-education center being created in Monroe County, perhaps in Woodsfield. This center would offer high-tech classrooms and a variety of courses, perhaps taught by faculty from a mix of colleges and universities here in eastern Ohio.

Overall, is your opinion toward a possible higher-education center in Monroe County positive, negative, or doesn't it matter to you one way or another? [IF POSITIVE / NEGATIVE] And is that very or somewhat (positive/negative)?

- 1. Very positive
- 2. Somewhat positive
- 3. Doesn't matter one way or another
- 4. Somewhat negative
- 5. Very negative
- 98. DK
- 99. RF

15) How much would you, personally, want to take higher-education classes at a center in Monroe County, assuming the courses were of interest to you? Would you want to take courses...

- 1. Very much
- 2. A lot
- 3. Moderately
- 4. A little
- 5. Or not at all?
- 98. DK
- 99. RF

16) Many higher-education courses are four-credit hour courses that meet at least twice a week for a quarter. If you were to consider taking a four-credit-hour course, how much would you be willing to pay for it? (If say "DK", encourage a best guess)

_____ [RECORD RESPONSE IN DOLLARS]

- DK
- RF

- 17) (Prior version of question 16, deleted after first night of surveying)
- 18) How likely or unlikely are you, personally, to enroll in a course at a higher education center in Monroe County, assuming the courses were of interest to you? Are you...
1. Very likely
 2. Somewhat likely
 3. Somewhat unlikely
 4. Very unlikely
 98. DK
 99. RF
- 19) In your own words, please tell me more about your answer to this last question. Why are you (PIPE IN RESPONSE FROM Q18) to enroll in a course there?) [Open-ended response]
- 20) **(If Q18=VERY LIKELY OR SOMEWHAT LIKELY, CONTINUE. OTHERWISE, SKIP TO 21)** What types of courses might be of interest to you? (DO NOT READ RESPONSE OPTIONS. ACCEPT UP TO THREE RESPONSES. IF CATEGORY IS NOT OBVIOUS, ENTER ANSWER UNDER "OTHER" FOR LATER CODING)
1. Computer science
 2. Business
 3. Education
 4. Health-care related
 5. Arts and sciences
 6. Law / medicine
 7. Performing arts
 8. Fine arts
 9. Engineering
 97. Other: _____
 98. DK
 99. RF
- 21) Higher-education courses can be taken in ways that save time and travel. Three of these ways include videoconferencing, the Internet, and condensed courses—that is, one four-hour course a week instead of two 2-hour courses. Does knowing this make you more likely to consider taking a higher-education course, less likely, or does this not really matter to you?
1. More likely
 2. Less likely
 3. Does not really matter
 4. DK/RF
- [IF D=A FROM SCREENER, SKIP TO Q.24]
- 22) Are there any other members in your household 16 or over who would be VERY or SOMEWHAT LIKELY to enroll in a course at a higher education center in Monroe County if one is created?
1. Yes
 2. No [SKIP TO 24]
- 23) How many members of your household 16 years of age or older do you think would be VERY or SOMEWHAT LIKELY to enroll in a course at a higher education center in Monroe County?
_____ [ENTER A DISCRETE NUMBER]
- 24) Do you have any other comments about a possible higher-education center in Monroe County?
[Open-ended response.]

25) We're almost finished. Now, for statistical purposes, I need to ask you some additional questions. If you don't wish to answer a question, just say so and we'll move on. About how far away would you say you live from the town center of Woodsfield, in miles?

_____ [ENTER NUMBER OF MILES]

1. Live in Woodsfield
98. DK
99. RF

26) And about how far away would you say you live from the town center of Woodsfield, in minutes?

_____ [ENTER NUMBER OF MINUTES]

98. DK
99. RF

27) How many years total have you lived in Monroe County?

_____ [ENTER NUMBER OF YEARS] (98 = LESS THAN 1 YEAR)

28) In what high-school district is this household located?

1. Beallsville High School
2. Monroe Central
3. River High School
4. Swiss Hills Career Center
5. Switzerland of Ohio School District
6. Other (please specify): _____
7. Don't know / Not sure

29) What is your age? _____

30) What is the highest level of education you have completed?

1. Grade school [SKIP TO 32]
2. Still in high school [SKIP TO 32]
3. High school graduate OR equivalency (GED)
4. Vocational or technical programs
5. Two-year college programs
6. Some college
7. College graduate (four-year)
8. Graduate degrees (e.g., MA, MBA, PhD, JD, DO, MD)
9. DK / RF

31) Did you go to high school in Monroe County?

1. Yes
2. No

32) What is your current employment status: are you...

1. Employed full-time
2. Employed part-time
3. Unemployed
4. A student
5. A homemaker, or
6. Retired?
7. (Other)
8. (DK / RF)

33) [IF EMPLOYED FULL OR PART TIME, CONTINUE. OTHERWISE, SKIP TO 34] Approximately how many miles is it from where you live to where you work?

(ENTER MILES) _____

34) Are you...

1. Married
2. Separated
3. Divorced
4. Widowed, or
5. Have you never been married?
6. (Do not read: A member of an unmarried couple)
8. (Do not read: DK / RF)

[IF C = PROSPECT [1 OR 2], CONTINUE; IF C=5, SKIP TO 36]

34) How many people, including yourself, live in your household?
_____ (99 = RF)

[IF 1, SKIP TO 36)

35) And how many, including yourself, are 16 years of age or older?
_____ (98=NONE) (99 = RF)

36) Do you or your family own or rent your home?

1. Own
2. Rent
3. Other Specify: _____

37) In your opinion, how skilled are you with computers? Are you...

1. Very
2. A lot
3. Moderately
4. A little
5. Or not at all skilled?
98. DK
99. RF

38) Do you have a computer in your household?

1. Yes
2. No [SKIP TO 40]

39) Is the computer in your household connected to the Internet? [IF YES] What type of Internet connection do you usually use?

1. No, computer is not connected to the Internet
2. Yes, dial-up (phone line only)
3. Yes, cable broadband
4. Yes, DSL
5. Yes, Something else (please specify)
98. DK
99. RF

40) What race or ethnic group do you consider yourself to be? (RECORD AS RESPONDENT SAYS)

1. African-American
2. Alaskan Native
3. American Indian
4. Asian
5. Black
6. Caucasian
7. Hispanic
8. Latino
9. Mexican
10. Pacific Islander
11. Somalian
12. White
97. Other: _____
98. DK / RF

41) Which of the following categories best describes the combined yearly income before taxes of all individuals living in your household in 2006? Just stop me when I reach the appropriate number ...

1. Less than \$15,000
2. \$15,000 to under \$30,000
3. \$30,000 to under \$50,000
4. \$50,000 to under \$75,000
5. \$75,000 or more?
8. DK / RF

42) Are any members of your household on public assistance? Do not include Social Security for retirees as public assistance.

1. Yes
2. No
3. DK
4. RF

That was my last question. Thank you for sharing your opinions with me. Good-bye. (TERMINATE)

LENGTH: _____

43) GENDER:

1. Male
2. Female

44) INTERVIEWER EVALUATION OF THE RESPONDENT'S ABILITY TO UNDERSTAND QUESTIONS:

Overall, the respondents understanding of the questions was...

1. Poor
2. Fair
3. Good
4. Excellent
5. DK

Appendix D: Method and Demographics

Method and Demographics. A description of the method used to conduct this survey is discussed below.

- **Population under study.** All households within Monroe County, Ohio.
- **Survey parameters.** Telephone interviews for the Monroe County Market Potential Survey were conducted from May 29, 2007 to June 10, 2007. The survey was designed to take 15 minutes and used computer-assisted telephone interviewing (CATI). Venture Data conducted the surveys to the specifications and with the oversight of The Strategy Team, Ltd. The survey included both closed and open-ended questions, with the latter allowing respondents to answer in their own words while the former provides response options for the participant.
- **Sample size, stratification, and sampling error estimate.** Overall, 600 surveys were completed with randomly selected Monroe County households. This random sample allows BTC and Monroe County commissioners to project the results from the telephone surveys to the general, countywide population. The sampling error for a survey with an $n=600$ is $\pm 3.9\%$ at the 95% confidence level.⁴⁶
- **Respondent selection.** Within each household surveyed during the course of the random sample, all potential respondents 16 years and older were screened into one of two categories: potential students (i.e., those who plan to enroll in a college course in the next three years), and influencers (i.e., those who are not planning to enroll in the next three years). When a potential student was not present within a household, the particular respondent to be interviewed was randomly selected using the last birthday method – i.e. the qualified respondent who last celebrated a birthday was asked to participate.
- **Demographics of survey respondents.** Tables D-1 and D-2 (next page) present the participant demographics for this survey of Monroe County households. Data were weighted by age and educational attainment so as to more closely match 2000 U.S. Census estimates on these variables; the survey estimates for race, employment, and household income also closely match 2000 U.S. Census data.

⁴⁶ Sampling error will vary within subgroups and among questions, depending upon the number of cases included in each subgroup as well as the distribution of responses.

Table D-1: Respondent Demographics

	Total (n=584)		Potential students (n=234)		Not potential students (n=345)	
	No.	%	No.	%	No.	%
Gender						
Female	338	57.8%	155	66.2%	180	52.3%
Male	247	42.2%	79	33.8%	164	47.7%
Age						
16 to 24	54	9.2%	46	19.7%	8	2.3%
25 to 44	198	33.9%	91	39.1%	105	30.4%
45 to 64	207	35.5%	76	32.6%	127	36.8%
65 years old and up	125	21.3%	20	8.6%	105	30.4%
Average age	49.4		42		54.4	
Education						
Less than high school	125	21.4%	36	15.4%	89	25.9%
High school or equiv	286	49.0%	92	39.3%	188	54.7%
Some college	126	21.6%	82	35.0%	44	12.8%
College graduate and up	47	8.1%	24	10.3%	23	6.7%
Employment status (n=581)						
Employed Full-time	225	38.7%	85	36.5%	140	40.8%
Employed Part-time	48	8.3%	29	12.4%	19	5.5%
Unemployed	39	6.6%	25	10.7%	12	3.5%
Student	19	3.3%	18	7.7%	1	0.3%
Homemaker	72	12.4%	30	12.9%	42	12.2%
Retired	141	24.3%	29	12.4%	111	32.4%
Other	37	6.4%	17	7.3%	18	5.2%
Marital Status						
Married	341	58.4%	129	55.1%	207	60.2%
Separated / Divorced	82	13.9%	32	13.6%	48	14.0%
Widowed	62	10.7%	14	6.0%	48	14.0%
Never Been Married	99	17.0%	59	25.2%	41	11.9%
Race (n=578)						
Caucasian	546	94.5%	221	94.4%	321	94.4%
Other (e.g., African American, Hispanic, "American")	32	5.5%	13	5.6%	19	5.6%

Note: "Potential students" includes respondents from those households that likely contain a potential student, after one combines Estimates A, B, C, or D. Unless otherwise noted, all figures and tables report "valid responses" (e.g. responses of "I don't know" or refusal to answer are not included in the analysis). In the figures and tables throughout the report, the percentages may not add up to 100% because of rounding error.

Table D-2: Respondent Demographics

	Total (n=584)		Potential students (n=234)		Not potential students (n=345)	
	No.	%	No.	%	No.	%
Own / Rent						
Own	495	84.7%	191	82.0%	298	86.6%
Rent	89	15.3%	42	18.1%	46	13.4%
Geographic location						
Miles from Woodsfield (average)	11.1		10.4		11.5	
Minutes from Woodsfield (average)	17.5		16.6		18.1	
Household Income (n=492)						
Less than \$15,000	117	23.9%	42	21.2%	75	25.8%
\$15,000 to under \$30,000	145	29.5%	59	29.8%	86	29.6%
\$30,000 to under \$50,000	115	23.3%	50	25.3%	65	22.3%
\$50,000 to under \$75,000	66	13.4%	29	14.6%	37	12.7%
\$75,000 or more	49	9.9%	18	9.1%	28	9.6%
Computer in household?						
Yes	391	66.9%	181	77.7%	205	59.6%
No	193	33.1%	52	22.3%	139	40.4%
Computer connected to Internet? (n=379)						
No, not connected to Internet	74	19.5%	31	17.4%	42	21.3%
Yes, dial-up	178	46.9%	89	50.0%	89	45.2%
Yes, DSL	68	18.0%	22	12.4%	19	9.6%
Yes, cable broadband	41	10.9%	30	16.9%	39	19.8%
Yes, some other means	17	4.6%	6	3.4%	8	4.1%

Appendix E: Details of market estimation calculations

	% of HHs in sample	HHs in Co	Lower bound Estimate	# of HHs with "others"	Mean # of "others" in HH	Additional prospects	Upper bound estimate
% of HHs containing at least one person who "very much" or "a lot" wants to take classes at a higher education center in Monroe Co	35.1%	6030	2118	64	1.75	112	2230
% of HHs containing at least one person who at beginning of survey is currently considering classes	15.1%	6030	912	32	1.71	54.72	966
% of HHs containing at least one person who is currently considering classes and who "very much" or "a lot" wants to take classes at a higher education center in Monroe Co	10.1%	6030	609	26	1.74	45.24	655
% of HHs containing at least one person who is currently considering classes and who is "very likely" to take classes at a higher education center in Monroe Co	8.2%	6030	494	21	1.73	36.33	530

Legend:

% of HHs in sample: Derived from sample data. Equal to the percentage of households who answered as the description of the estimate indicates (e.g. for the first estimate, the number of respondents who are both considering classes and very likely to enroll at a higher education center in Monroe County) divided by the total number of households with valid responses to the question.

HHs in Co: Total number of households in Monroe County (always equal to 6,030 per Census estimates)

Lower bound estimate: Equal to the % of HHs in sample column, multiplied by the number of HHs in County column.

of HHs with others: Derived from Sample data. Equal to the number of households who say there are others aged 16 and over who are "very" or "somewhat" likely to take classes at an education center in Monroe County.

Mean # of "others" in HHs: Derived from sample data. Equal to the average number of people aged 16 and over per household who respondents indicate are "very" or "somewhat" likely to take classes at an education center in Monroe County.

Additional prospects: Equal to the # of HHs with others column, multiplied by the Mean # of others column.

Upper bound estimate: Equal to sum of the Lower Bound Estimate and the Additional prospects column.