

FAYETTEVILLE TECHNICAL COMMUNITY COLLEGE (FTCC)
2019-2020 PLANNING ASSUMPTIONS AND TRENDS
Approved by the Board of Trustees on March 16, 2020

I. ECONOMIC TRENDS AND PLANNING ASSUMPTIONS

Analysis Summary

- Meeting demand for qualified applicants in nursing, automotive maintenance, retail, cyber-security, computer support technicians/managers, logistics, physical facilities maintenance, manufacturing, and hospitality occupations remain the strongest priority need for local employers. FTCC continues to train in these occupations to meet the employer need.
- Public Broadcasting has reported that 85% of today's jobs will likely not be required in 2030, being replaced with jobs that do not exist today, requiring ongoing changes in programs of instruction to meet employment needs of the future.
- Employers report it is increasingly difficult to find applicants who can communicate clearly, take initiative, problem-solve, and get along with their co-workers. FTCC continues to supplement instruction with soft-skill development instruction and the College's General Education Core Competencies supports instruction in these soft-skill requirements to meet this employer need.
- FTCC military/college rankings reflect the College continues education to support highly skilled active duty soldiers, their spouses, and veterans, with recognition received via multiple national awards for superior service provided to military, veterans, and their families.

General Economic Assumptions and Trends

- The performance of national financial markets and overall employment adjustments has greatly improved during the most recent fiscal year with additional support for blue-collar jobs, adjusted federal controls in the healthcare sector, and reduction of corporate and personal income taxes (*Labor Economics*, 2019; *Labor History*, 2019; *Small Business Economics*, 2019).
- The number of people filing for unemployment benefits has declined to its lowest level in more than four decades. This normally equates to lower enrollment in community colleges as the economy moves closer to full-employment. FTCC continues to actively recruit across all population sectors and has not felt the same decline in enrollment experienced by other post-secondary institutions. As the economy grows, reports indicate that:
 - Private employers have continually added jobs for nearly nine years.
 - The share of people working part-time rather than full-time has decreased primarily due to economic reasons.

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

- The current participation rate, the measure of those working or looking for jobs, is currently stable, after previously falling to lows not seen since the 1970s.
- Wages, long dormant, are slowly increasing but not reaching the levels needed to meet employer's new applicant needs resulting in what is considered a full-employment marketplace. Public Broadcasting Service reported "when unemployment is low, employers should raise wages to attract more skilled workers and they aren't doing that as much as expected." (Journal of Economic Issues, 2019; Journal of Economic Perspectives, 2019; Social Science Quarterly, 2019).
- Defense spending and the movement to increase the capabilities of the Armed Forces is expected to continue over the next several years, indicating additional training requirements will need to evolve to meet those adjusted training needs. (Armed Forces & Society, 2019; Foreign Affairs, 2019; Journal of Intervention and Statebuilding, 2019).
- Fort Bragg has a significant impact on the local economy. It is the largest local employer, with 65,000 military and civilian employees. It is also home to more military decision makers than any other location outside the Pentagon. This concentration of economic impact resulting from Fort Bragg operations and the concentration of senior-level decision makers, has influenced growing numbers of major defense contractors opening locally. The North Carolina Military Business Center (NCMBC) business recruitment activities continue to provide strong support to companies desiring to move closer to Fort Bragg. With the anticipated growth of both troop end-strength and defense spending, FTCC's co-location and the ongoing partnerships with Fort Bragg and other major military installations across the United States places the College in a strong position to meet the needs of the changing military and the larger defense industry. (North Carolina Military Business Center, 2019).

National and Local Job Trends

- U.S companies added 145,000 jobs in December 2019 that were broad based according to needs of the business sectors. In December, job gains occurred in retail trade (+41,000), leisure and hospitality (+40,000), healthcare (+28,000), and construction (+20,000). (United States Bureau of Labor Statistics (BLC), January 2020). FTCC continues to modify programs and enroll students in these areas, along with other sectors not included in the BLC report, such as cyber-security, computer support, automotive maintenance, and facilities maintenance.
- Employers report that 85% of the jobs today's students will not exist in 2030 or do not even exist yet. In support of this assumption, the Institute for the Future cites examples of current-mainstream careers that did not exist just a few years ago, including drone operator, social media manager, app developer, and cloud computing engineer, among others. FTCC continues to expand programs, including short-term training opportunities, to meet this evolving pattern in the workplace. (Economic

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

Alternatives, 2019; *PBS.org* “How colleges are preparing students for jobs that don’t exist yet, December 14, 2018)

- The Fast Food industry continues to expand its use of technology to reduce human labor costs through the installation of self-service Kiosk’s. Other industries such as the grocery industry also have self-service lanes and these lanes continue to expand across the retail industry. It is likely that additional fast food restaurants will follow the fast food’s kiosk example to remain competitive through reduction of their labor cost. (*FTCC Self-reported observations*).
- Companies across the United States say it is becoming increasingly difficult to find applicants who can communicate clearly, take initiative, problem-solve and get along with others. These soft-skills are some of the job market’s most sought-after skills and can make a difference when considering applicants for available employment positions. FTCC continues to incorporate soft-skills as a component of instruction within courses to enhance student success as they transition to the job market. Soft-skills remain a significant portion of the College’s General Education Core Competencies expected of all FTCC graduates. (*Accounting Education*, 2018; *The Wall Street Journal*, Employers find “Soft-Skills” like Critical Thinking are in Short Supply, December 17, 2018).
- Table 1 reflects new jobs created during the 2018-19 fiscal year and industries showing declining numbers of positions. Food Service, General Managers, Registered Nurses, Building Construction Trades, Logistics, and Transportation lead the projected growth industries, when separated from the general sector of sales and related occupations. There is a significant need for additional nurses, maintenance support and repair, computer technology related jobs, and licensed practical nurses both locally and nationally.
- Table 2 reflects long-term employment sector projections for new jobs through 2024, with the greatest need occurring in the industry sectors of food service, healthcare, computer support jobs including cyber-security, auto body repair, logistics including facilities maintenance, and transportation related job such as vehicle drivers and vehicle maintenance jobs. The College continues to offer programs of study, with both short–and long-term credential opportunities, to prepare students for employment in these evolving fields of work.
- Tables 1 and 2 collectively illustrates the local industry demand in these occupations. The College continues to expand partnerships with employers through:
 - academic program reviews, and
 - regular advisory committee meetings with industry leaders sharing their additional training requirements in the growing employment sectors.
 - Industry sector modeling, including analysis of the College’s direct impact on the local economy.

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

**Table 1: Economic Modeling Specialists, International (EMSI)
Regional Private Workforce and Industry New Job Creation
(Cumberland County)**

Description	2018 Jobs	2019 Jobs	2018 - 2019 Change	Avg. Hourly Earnings	2019 Location Quotient
Taxi Drivers and Chauffeurs	871	960	89	\$12.87	0.53
Construction Laborers	1,160	1,230	70	\$14.48	0.63
Combined Food Preparation and Serving Workers, Including Fast Food	6,203	6,271	68	\$9.69	1.67
First-Line Supervisors of Construction Trades and Extraction Workers	916	968	52	\$26.54	1.11
Carpenters	817	868	51	\$17.01	0.59
Hairdressers, Hairstylists, and Cosmetologists	1,317	1,354	37	\$14.18	1.25
Cooks, Restaurant	1,242	1,278	36	\$12.03	0.87
Personal Care Aides	1,438	1,473	35	\$10.47	0.53
Managers, All Other	1,893	1,925	32	\$41.08	0.87
Construction Managers	435	466	31	\$39.44	0.79
Management Analysts	1,000	1,030	30	\$43.37	0.74
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	468	496	28	\$23.55	1.56
General and Operations Managers	1,579	1,605	26	\$53.92	0.63
Heavy and Tractor-Trailer Truck Drivers	2,186	2,209	23	\$19.97	0.80
Property, Real Estate, and Community Association Managers	973	995	22	\$31.13	0.61
Landscaping and Groundskeeping Workers	1,207	1,227	20	\$13.14	0.84
Electricians	754	772	18	\$19.55	0.94
Door-to-Door Sales Workers, News and Street Vendors, and Related Workers	868	885	17	\$16.29	0.93
Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	323	339	16	\$18.92	4.50
Writers and Authors	392	407	15	\$25.74	0.69
Social and Human Service Assistants	237	251	14	\$17.00	0.59
Accountants and Auditors	1,016	1,029	13	\$37.70	0.58
Self-Enrichment Education Teachers	694	706	12	\$20.12	0.97
Massage Therapists	424	435	11	\$20.51	1.20
Marriage and Family Therapists	58	68	10	\$37.35	1.10
Food Service Managers	411	420	9	\$19.87	0.76
Child, Family, and School Social Workers	457	465	8	\$22.04	1.41
Financial Managers	360	367	7	\$62.08	0.39
Compliance Officers	195	201	6	\$33.08	0.62
Industrial Production Managers	89	93	4	\$44.97	0.46
Architectural and Engineering Managers	115	118	3	\$57.96	0.60
Marketing Managers	112	114	2	\$47.29	0.34
Sales Managers	157	158	1	\$45.05	0.35
Public Relations and Fundraising Managers	69	68	(1)	\$63.68	0.88
Training and Development Managers	299	297	(2)	\$64.07	6.26
Medical Records and Health Information Technicians	256	253	(3)	\$21.21	1.14
Computer Systems Analysts	382	378	(4)	\$35.11	0.57
Education Administrators, All Other	392	387	(5)	\$40.57	5.14
Pharmacists	334	328	(6)	\$58.94	1.06

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

Description	2018 Jobs	2019 Jobs	2018 - 2019 Change	Avg. Hourly Earnings	2019 Location Quotient
Network and Computer Systems Administrators	430	423	(7)	\$36.85	1.09
Health Technologists and Technicians, All Other	294	285	(9)	\$19.14	2.04
Farmers, Ranchers, and Other Agricultural Managers	283	273	(10)	\$32.96	0.16
Childcare Workers	1,404	1,390	(14)	\$9.87	0.91
Medical Secretaries	678	663	(15)	\$14.28	1.08
Registered Nurses	3,113	3,096	(17)	\$34.28	1.00
Receptionists and Information Clerks	1,152	1,131	(21)	\$12.75	0.99
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	459	437	(22)	\$19.85	1.05
Licensed Practical and Licensed Vocational Nurses	1,415	1,389	(26)	\$22.08	1.80
Office Clerks, General	4,092	4,063	(29)	\$14.75	1.16
Cashiers	4,637	4,600	(37)	\$9.62	1.26
Nursing Assistants	2,220	2,181	(39)	\$12.09	1.35
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	2,853	2,790	(63)	\$12.46	0.87
Military-only occupations	22,648	22,544	(104)	\$18.37	24.00
Total	77,938	78,340	401	\$28.12	1.58

Source: EMSI 2020 (1st Quarter): Occupation Report; *Location Quotient: Concentration in Cumberland County compared to all other NC Counties; 1 – Average

**Table 2: EMSI Regional Private Workforce and Industry Projections
(Cumberland County)**

Description	2019 Jobs	2024 Jobs	2019 - 2024 Change	Avg. Hourly Earnings	2024 Location Quotient
Combined Food Preparation and Serving Workers, Including Fast Food	6,271	6,661	390	\$9.69	1.66
Taxi Drivers and Chauffeurs	960	1,245	285	\$12.87	0.56
Construction Laborers	1,230	1,405	175	\$14.48	0.68
Cooks, Restaurant	1,278	1,446	168	\$12.03	0.90
Waiters and Waitresses	2,350	2,509	159	\$9.95	0.93
Registered Nurses	3,096	3,230	134	\$34.28	1.00
Managers, All Other	1,925	2,042	117	\$41.08	0.88
Hairdressers, Hairstylists, and Cosmetologists	1,354	1,469	115	\$14.18	1.31
Management Analysts	1,030	1,144	114	\$43.37	0.79
Real Estate Sales Agents	2,428	2,537	109	\$31.10	0.63
First-Line Supervisors of Construction Trades and Extraction Workers	968	1,064	96	\$26.54	1.20
Business Operations Specialists, All Other	1,826	1,920	94	\$38.50	1.58
Carpenters	868	958	90	\$17.01	0.64
Personal Care Aides	1,473	1,554	81	\$10.47	0.48
Construction Managers	466	535	69	\$39.44	0.89
General and Operations Managers	1,605	1,673	68	\$53.92	0.64
First-Line Supervisors of Food Preparation and Serving Workers	1,423	1,490	67	\$15.84	1.37
Landscaping and Groundskeeping Workers	1,227	1,293	66	\$13.14	0.85
Property, Real Estate, and Community Association Managers	995	1,058	63	\$31.13	0.61
Food Preparation Workers	689	745	56	\$9.88	0.83
Self-Enrichment Education Teachers	706	757	51	\$20.12	0.98

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

Description	2019 Jobs	2024 Jobs	2019 - 2024 Change	Avg. Hourly Earnings	2024 Location Quotient
Writers and Authors	407	456	49	\$25.74	0.74
Personal Financial Advisors	539	587	48	\$55.44	0.30
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	492	535	43	\$9.30	1.20
Massage Therapists	435	477	42	\$20.51	1.22
Computer Occupations, All Other	962	1,001	39	\$42.38	2.02
Accountants and Auditors	1,029	1,067	38	\$37.70	0.60
Manicurists and Pedicurists	305	342	37	\$13.20	1.03
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	496	532	36	\$23.55	1.53
Software Developers, Applications	249	283	34	\$39.67	0.25
Medical Assistants	828	861	33	\$14.01	1.10
Dining Room and Cafeteria Attendants and Bartender Helpers	490	522	32	\$10.58	1.07
Food Service Managers	420	451	31	\$19.87	0.79
Financial Managers	367	397	30	\$62.08	0.40
Market Research Analysts and Marketing Specialists	251	280	29	\$27.95	0.32
Clergy	600	627	27	\$22.55	1.75
Physicians and Surgeons, All Other	642	668	26	\$101.49	1.22
Medical and Health Services Managers	587	611	24	\$53.17	1.32
Fine Artists, Including Painters, Sculptors, and Illustrators	161	184	23	\$11.69	0.71
Logisticians	2,008	2,029	21	\$41.66	4.73
Cost Estimators	125	144	19	\$31.08	0.60
Compliance Officers	201	219	18	\$33.08	0.66
Nursing Assistants	2,181	2,198	17	\$12.09	1.34
Art Directors	120	136	16	\$21.72	0.61
Chief Executives	303	318	15	\$72.09	0.54
Social and Human Service Assistants	251	265	14	\$17.00	0.59
Engineers, All Other	230	243	13	\$49.07	1.21
Meeting, Convention, and Event Planners	159	171	12	\$19.64	0.68
Sales Managers	158	169	11	\$45.05	0.36
Marketing Managers	114	124	10	\$47.29	0.36
Paralegals and Legal Assistants	316	325	9	\$22.00	0.92
Lodging Managers	132	140	8	\$21.96	0.83
Training and Development Specialists	486	493	7	\$32.01	1.45
Social and Community Service Managers	117	123	6	\$32.60	0.58
Administrative Services Managers	249	254	5	\$43.20	0.80
Education Administrators, Postsecondary	127	131	4	\$45.25	0.84
Public Relations and Fundraising Managers	68	71	3	\$63.68	0.90
Natural Sciences Managers	21	23	2	\$73.41	0.35
Industrial Production Managers	93	94	1	\$44.97	0.46
Training and Development Managers	297	297	0	\$64.07	6.16
Loan Officers	233	231	(2)	\$29.84	0.71
Labor Relations Specialists	107	104	(3)	\$10.44	1.43
Education Administrators, Preschool and Childcare Center/Program	110	106	(4)	\$16.54	1.38

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

Description	2019 Jobs	2024 Jobs	2019 - 2024 Change	Avg. Hourly Earnings	2024 Location Quotient
Parking Enforcement Workers	26	21	(5)	\$17.24	2.46
Pharmacists	328	322	(6)	\$58.94	1.06
Switchboard Operators, Including Answering Service	41	34	(7)	\$12.67	0.54
Advertising Sales Agents	88	80	(8)	\$23.22	0.43
Education Administrators, Elementary and Secondary School	292	283	(9)	\$28.97	1.05
Special Education Teachers, Kindergarten and Elementary School	236	225	(11)	\$22.13	1.26
Child, Family, and School Social Workers	465	453	(12)	\$22.04	1.35
Telemarketers	93	80	(13)	\$12.96	0.48
Driver/Sales Workers	835	821	(14)	\$10.12	1.79
Bookkeeping, Accounting, and Auditing Clerks	1,369	1,354	(15)	\$19.57	0.71
Cashiers	4,600	4,584	(16)	\$9.62	1.29
Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	162	145	(17)	\$17.26	1.96
Secondary School Teachers, Except Special and Career/Technical Education	820	802	(18)	\$21.60	0.76
Career/Technical Education Teachers, Secondary School	323	304	(19)	\$12.08	3.94
Packers and Packagers, Hand	380	360	(20)	\$10.29	0.51
Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	339	317	(22)	\$18.92	4.31
Preschool Teachers, Except Special Education	863	840	(23)	\$14.74	1.53
Laborers and Freight, Stock, and Material Movers, Hand	1,730	1,705	(25)	\$12.57	0.52
Farmers, Ranchers, and Other Agricultural Managers	273	243	(30)	\$32.96	0.15
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	2,790	2,755	(35)	\$12.46	0.85
Teacher Assistants	1,278	1,242	(36)	\$10.44	0.88
Postal Service Mail Carriers	425	387	(38)	\$24.54	1.32
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,713	1,674	(39)	\$16.91	0.62
Telecommunications Equipment Installers and Repairers, Except Line Installers	494	450	(44)	\$22.32	1.76
Substitute Teachers	988	935	(53)	\$11.14	1.56
Security Guards	1,038	979	(59)	\$20.38	0.78
Customer Service Representatives	2,007	1,946	(61)	\$14.25	0.64
Childcare Workers	1,390	1,328	(62)	\$9.87	0.91
Elementary School Teachers, Except Special Education	1,715	1,651	(64)	\$20.24	1.15
Industrial Truck and Tractor Operators	984	904	(80)	\$19.39	1.36
Military-only occupations	22,544	22,444	(100)	\$18.37	24.77
Office Clerks, General	4,063	3,938	(125)	\$14.75	1.14
Total	106,816	109,117	2,296	\$26.94	1.38

Source: EMSI 2020 (1st Quarter): Occupation Report; *Location Quotient: Concentration in Cumberland County compared to all other NC Counties; 1 – Average

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

- Defense and Aerospace sector projections
 - North Carolina as the third-largest military population with the U.S. Army having the largest military presence in the state. Combined with the potential growth in both troop end-strength and federal government defense spending, additional opportunities in defense and aerospace are anticipated. Major corporations in this sector have begun establishing their footprint in the Fayetteville area as the region continues to grow in new businesses supporting the military. This expansion of new businesses is anticipated to continue its growth pattern as more businesses move into the local economy. (*Economic Development Partnership of North Carolina*, 2020).
 - The military, and expanding military-support industries, will continue to have a high demand for a skilled workforce with strong computational skills, interpersonal communication skills, and other soft-skills. FTCC continues to offer mathematics, information technology courses, communications courses, and soft skills training in all programs. The College is also expanding STEM-related training opportunities to meet the expanding needs of local, regional and national employment sectors. (*Developments and Advances in Defense and Security*, 2020; *Security Strategies Journal*, 2019; *The Collegiate Aviation Review International*, 2018).
 - Highly skilled active duty service members depart active military service each year. More than 97% of new veterans begin their transition to private sector careers at community colleges. FTCC has expanded its course offerings for military personnel to other branches of the military beyond just the U.S. Army stationed at Fort Bragg. To meet the needs of the multiple military branches, the College continues to revise and expand its Credit for Prior Learning opportunities, thereby assisting the multiple branches of the armed forces members transitioning to civilian careers. (*Economic Inquiry*, 2018; *Journal of Social Service Research*, 2019; *Victory Media*, 2019).
 - Throughout the 2018-2019 academic school year, VA payment rates reflected maximum amounts. This means full eligibility and benefits (100%) for students at in-state public colleges. Private or foreign colleges may receive up to \$23,671.94 each academic school year, which is the national maximum. Regardless of formal state of residency, if a student temporarily lives in the same state of the college, then qualifications remain the same for receiving tuition benefits. Students may also be qualified to receive a one-time rural benefit package, a monthly housing allowance, and a course resource stipend. As a result of these VA benefits, FTCC continues to experience increased enrollment of military spouses and dependents with a corresponding expansion of support services staff providing guidance and administrative support. (*U.S. Department of Veterans Affairs*, 2019).

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

- The Forever GI Bill assists students who were affected by school closures or specific program disapprovals, by eliminating the 15-year time limit for using the GI Bill at community/technical colleges. The Forever GI Bill continues to undergo changes associated with additional funding for licensure or certification programs, increased survivor's and dependent's educational assistance, transferring of benefits within the family, consolidating benefit levels, beneficiary entitlement, additional funding for STEM (Science, Technology, Engineering & Math) programs, pilot programs, additional funding for recipients of the Purple Heart medal, and increases in housing allowances. FTCC continues to monitor legislative changes in benefits and provides information to students, faculty and staff possibly affected by such changes. (*Community College Journal of Research and Practice*, 2019; *U.S. Department of Veterans Affairs*, 2019).
- FTCC is highly ranked by nationally recognized military support publications for superb service to military students, including:
 - Ranked #5 in the nation in “*Military Times EDGE Magazine* 2019.”
 - Best for Vets: Career and Technical Colleges.” Rankings were based on college culture, student support, academic policies, academic quality, and financial aid.
 - Designated as a Military Friendly School: Ranked #1 (Gold) among the Top 10 School by Victory Media (2nd year in a row). The designation is awarded to the top 10% of schools nationwide that deliver the best experience for military students.
 - Designated as a Military Advanced Education and Transition College by KMI Media Group. The designation is reserved for those colleges and universities that implement best practices regarding its active duty and veteran student populations.
- Public sector projections
 - Public sector employment is anticipated to continue growth over the next five years as legislature requirements continue to be modified or expanded.
 - NC-based public colleges and universities continue to experience difficulty in obtaining annual budget revenues in a timely manner to support expansion of programs to meet employer needs.
 - NC-based faculty and staff salaries continue to lag behind salaries paid in other states and a hold on teacher raises in the 2019-2020 legislative session may have an impact on retention of qualified employees.
 - Twelve of Cumberland County’s top twenty-five employers are public sector organizations—Department of Defense, Veterans’ Administration, County and City governments, Postal Service, Healthcare, secondary and post-secondary education. (*North Carolina Department of Commerce*, 2019). FTCC continues

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

to expand program offerings to meet anticipated employer needs in these employment sectors.

- Food Service, Hospitality, and Retail sector projections
 - Population growth across the nation, and locally, is expected to increase food consumption and increase demand for food service, hospitality, and retail sales at or above the average for all occupations. FTCC programs of study provide highly trained graduates each year to meet expanding demand for new employees. Regionally, these industry sectors are expected to add more than 1,500 jobs over the next five years, supplemented with an increased demand for skilled managers in all of the sectors. FTCC's culinary, hospitality and business administration programs continue to meet the training need requirements for these occupations. (*Journal of Culinary Science & Technology*, 2018; *Nature*, 2018; *World News of Natural Sciences*, 2019).
- Healthcare sector projections
 - The President of the United States, in conjunction with Congress, passed legislation that stopped reimbursing insurers who waived deductibles and co-payments for low-income customers. As a result, health insurance companies are expected to increase healthcare premiums by 20 percent for the upcoming year with cuts to Medicare by \$470 million. However, the need for healthcare employees continues to increase. FTCC has entered into partnerships with healthcare providers to increase the numbers of qualified applicants to meet the increasing demand for qualified and credentialed applicants ready to immediately go to work. (*Journal of Public Health*, 2018; *New England Journal of Medicine*, 2019; *The Modern Hospital*, 2019).
 - Regionally, there continues to be a shortage of nurses, with the demand projected to increase further beyond the current annual need of 400+ new nursing applicant requirements. FTCC can expect increasing needs in education/training demands for both skilled registered nurses and practical nurses. Increasing competition for patient dollars has intensified through consolidation of hospitals into major regional healthcare centers, providing a higher demand and financial reward opportunity for talented nurses and allied health direct care professionals properly credentialed and work-ready. FTCC has expanded training in these growing employment sectors and provides clinical rotations during such training to meet the growing need in these occupations. Cape Fear Valley Health System, through a partnership with the College, is covering the tuition and fees of registered nursing students to expand opportunities to hire qualified nursing graduates locally. Upon graduation, these students agree to work for Cape Fear Valley Health System and will receive a \$15,000 sign-on bonus.

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

- Manufacturing sector projections
 - Through 2024 continued improvement is anticipated because economic conditions are improving with a corresponding return of consumer confidence. These economic factors are fueling increased opportunities in the manufacturing industry across the United States. For example, the automotive supply chain will need additional highly specialized workers in fields such as paint manufacturing, automobile steering, suspension manufacturing, automobile engine and parts manufacturing, and automobile brakes manufacturing. FTCC's Collision Repair and Refinishing Technology program is preparing employees for this forecasted employment growth sector. (*Energy Strategy Reviews*, 2019; *Journal of Cleaner Production*, 2019; *Journal of Vocational Education & Training*, 2019).
 - Trade positions offer lucrative Fayetteville-area salaries, supplemented with strong employer-paid benefit packages. The total compensation package in the trade occupations indicates local employers value employee skills and their post-secondary education/credentials that prepares them to be qualified applicants in hard to fill positions. FTCC continues to offer short-and long-term training leading to industry recognized credentials preparing students to meet this ongoing need as the baby-boomer generation continues moving into retirement.

Occupation	Number of Fayetteville Area Jobs - Projected through 2024*	Median Salary**	Value of the Benefits Package paid by the Employer**	Total Average Compensation (inclusive of benefits) **
Electricians	802	\$54,948	\$26,790	\$81,738
Diesel Mechanics	611	\$52,790	\$25,406	\$78,196
Plumbers, Pipefitters, and Steamfitters	397	\$52,198	\$25,055	\$77,253
HVAC	229	\$69,141	\$31,298	\$100,439
Automotive Body and Related Repairers	211	\$53,892	\$25,610	\$79,502
Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	22	\$51,293	\$18,086	\$69,379
Automotive Service Technicians and Mechanics	1,222	\$53,235	\$26,725	\$79,960
Total	3494	\$55,357	\$25,567	\$80,924

*Source: EMSI 2020 (1st Quarter): Occupation Report

**Source: Salary.com (Some median salaries are computed at levels II and III to meet employer skill need of future applicants).




FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

Legend: Value of Benefits includes employer paid social security, disability, healthcare, pension, and paid time off from Salary.com.

- FTCC offers curriculum programs and corporate and continuing education programs in manufacturing technologies, and the trades occupations in the preceding chart. These programs prepare graduates with short-term certifications and/or one- and two-year diplomas, and/or degrees. These programs have attracted the attention of manufacturing and trades leaders across the nation. With training opportunities available at FTCC, local residents are preparing now for these current and future employment opportunities in the trades industry. (Energy Strategy Reviews, 2019; Journal of Cleaner Production, 2019; Journal of Vocational Education & Training, 2019).
- Distribution and Transportation sector projections
 - The ongoing need for logistics analysts is expected to rise by 22% through 2022. Logisticians work in nearly every industry sector, and the increased employment growth anticipated in this sector reflects significant opportunities in the transportation sector of the global economy. FTCC continues to expand training opportunities preparing students for these sector growth opportunities. (Applied Energy, 2018; Energy Policy, 2019; International Journal of Sustainable Energy, 2019).
 - Walmart stores, with a regional distribution warehouse in Cumberland County, remains a major employer in the region with more than 1,000 employees. Rooms-to-Go has a regional sales and distribution center, strategically located close to Fayetteville on Interstate 95 that is midway between the Central Atlantic states to the north, and Atlanta and Florida to the south. This region's access to deep water ports in both North and South Carolina, makes this area a strong choice for additional distribution operations. FTCC has expanded programs of study related to global logistics and supply chain management to provide a workforce ready to meet the growing demand for talented employees to sustain distribution operations in these enterprises.
 - According to the American Trucking Association, about 51,000 more truck drivers are needed to meet the demand from companies such as Amazon and Walmart as increased shipping is required across the nation. Truck driver applicants are expected to remain in high demand to support increases in transportation infrastructure across the nation. Locally, truck drivers are being hired quickly as they complete their FTCC training and certifications. (Journal of Economic Perspectives, 2019; The Washington Post, America has a massive truck driver shortage, May 28, 2018).

Unemployment and Labor Force Participation

- The number of long-term unemployed (those jobless for 27 weeks or more) has decreased during the past year to just under 1.19 million nationwide. This corresponds with federal reports indicating full employment. (*United States Bureau of Labor Statistics*, January 2020).
 - The North Carolina unemployment rate has slightly increased as compared with the national average. This slight increase does not include those that are underemployed (working part-time and/or not seeking jobs with additional benefits) or those that are no longer in the labor force (discouraged workers). The underemployed and those no longer considered in the workforce remains a growing concern for regional economic, labor, and social experts. FTCC continues to strengthen its partnerships with the local employment experts and the Workforce Development Board to meet training needs of the underemployed or the region's discouraged workers.
 - FTCC remains focused on helping the unemployed, underemployed and homeless population to acquire new skills enabling them to better meet the needs of their family.

Unemployment Rates			
	Nov 2018	Nov 2019	Status
National	3.7%	3.5%	 0.2%
North Carolina	3.6%	3.8%	 0.2%
Cumberland County	4.6%	4.6%	 0.0%

Source: North Carolina Department of Labor and Economic Analysis, 2020, 1st Quarter

Enrollment and Financial Aid Trends

- As students enroll in community colleges across the United States, online programs of study have expanded exponentially since 2010. Nationally, online students completed their associate degrees at rates higher than students participating in face-to-face modalities. FTCC requires the same level of work, competencies, and learning outcomes regardless of modality. FTCC also requires all classes to have an online component to supplement instruction and allow for continuity of studies in periods of military deployments, adverse weather, or other reasons for College closings. Online (hybrid) courses allow students to continue their studies during periods of time when they are unavailable to attend regularly scheduled classes. (*Inside Higher Ed*, 2018; *Interactive Learning*, 2019; *Understanding Community Colleges*, 2018).
 - A focus on assisting students when outside influences may be negatively affecting decisions on whether to continue studies or discontinue educational goals. Non-educational demands of community college students can negatively affect their retention, completion rates and future financial aid. These demands include family life, employment conflicts, and local economic conditions. At FTCC, students take advantage of a variety of student support

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

services and learning modalities facilitating students to continue to persevere during these difficult times to achieve their educational and career aspiration goals. FTCC provides multiple sources of emergency funding to help students struggling financially to continue their programs of study. (*Research in Higher Education*, 2018; *The Internet and Higher Education*, 2020; *Understanding Community Colleges*, 2018).

- A growing number of students who have already completed advanced degrees are returning to community colleges, including FTCC, for specific job skills training that will enable them change their career or advance in their current career. Students enrolled in four-year colleges and universities also enroll at community colleges during their summer breaks to take advantage of lower tuition rates and transferring community college courses back to their institution for transcript credit. FTCC experiences an increase registration of these students during summer semester. (*Annual Survey of Colleges & Universities*, 2010-2019; *Economic Inquiry*, 2018; *Petersons Undergraduate Survey of Colleges & Universities*, 2010-2019).
- The Southeastern region of the United States will experience an 11% increase in the number of high school graduates by 2022. FTCC is home to the Cumberland Polytechnic High School and will continue to expand partnerships with K-12 institutions preparing for this increased student population. The College also recently hired and placed College employed Career Coaches in local high schools to assist with new student registration, career-planning, retention and success. (*Bureau of Labor Statistics*, 2020; *The Economics of Education*, 2020).
 - The Department of Education published a series of reports that identified factors contributing to the current student loan default rates. Those factors include attendance at private institutions, students coming from low-income families, and their unemployment. Student default rates at FTCC have steadily declined through close monitoring, advanced debt counseling, and follow-up activities required to collect payments. (*Education and Urban Society*, 2018; *Journal of Community Engagement*, 2019).
- The federal government reports an ongoing need for student aid for higher education. However, as this aid has increased, the government has not seen a corresponding increase in numbers of students completing college. FTCC continues to increase student retention and graduation rates to increase the number of graduates. (*Integrated Post-Secondary Education Data Systems*, 2020; *Journal of Public Economics*, 2019; *The Economics of Education*, 2020).
- The federal government continues to focus on higher retention, graduation and job placement rates from colleges receiving federal financial aid. FTCC continues to focus on those activities necessary to increase retention, graduation, and job placement rates. This is evidenced by more than doubling of graduation rates from 7% to 17% from 2011-12 to 2018-19. (*National Center for Education Statistics*, 2019).

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

- 3-Year Financial Aid Review: As a result of curriculum students enrolling with lower estimated family contributions, there has been an increase in the amount of eligible financial aid monies awarded to cover tuition and fees as reflected in Table 3. This allows students to continue their educational goals as prices of goods and services continue to rise.

Table 3: Three-Year Financial Aid Awards

2018-2019 FTCC Financial Aid Awards			
Number of Students (duplicate) receiving	In-State Tuition Rate	Out-of-State Tuition Rate	Amount of Aid
27,808	\$2,528	\$8,672	\$66,063,169

2017-2018 FTCC Financial Aid Awards			
Number of Students (duplicate) receiving	In-State Tuition Rate	Out-of-State Tuition Rate	Amount of Aid
25,369	\$2,528	\$8,672	\$51,837,762

2016-2017 FTCC Financial Aid Awards			
Number of Students (duplicate) receiving	In-State Tuition Rate	Out-of-State Tuition Rate	Amount of Aid
23,395	\$2,528	\$8,672	\$46,685,594

Source: Integrated Post-Secondary Education Data Systems, Student Financial Aid Survey, 2019

II. PERSONAL FINANCE TRENDS

Analysis Summary

- NC ranks 33rd of the 50 states in per-capita personal income.
 - Financial aid and student educational loans remain a priority need for those seeking higher levels of educational and/or skill development.
 - Nearly half of Americans report living paycheck to paycheck.
 - The ability to pay for college remains problematic across the nation and FTCC continues to offer multiple financial aid or loan opportunities to students.
-
- According to data published in September 2019, from the U.S. Bureau of Economic Analysis, North Carolina ranked 33rd among all 50 states and the District of Columbia in per-capita personal income at \$47,896 which is 84% of the national income average, \$56,698. 2019 U.S. Bureau of Economic Analysis

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

- The United States suffers when one-half of high school graduates are from lower income families and are unable to attend college because of personal finances.
 - More than half of the FTCC students receive financial aid and many have an estimated family contribution of \$0 as reported by the Department of Education. Nationally, the completion rate for low-income students is less than 25 percent. FTCC completions continue to improve from seven percent in 2011 to seventeen percent in 2019 steadily moving towards the 25 percent goal established by the Department of Education. (Integrated Post-Secondary Education Data Systems, 2019; Journal of College Access, 2018; Journal of Ethnic and Migration Studies, 2018; Journal of Public Economics, 2019).
- With an improving economy, many Americans report facing a worse personal financial condition than they experienced a decade ago, resulting in a need for increased financial aid and support services to enroll, pay, and complete a degree, diploma or certificate. The challenges North Carolina students face include:
 - North Carolina's population is reported at 10,038,000 with 725,000 living at or below poverty income levels as defined by the Bureau of Labor Statistics. (Annual Survey of Colleges & Universities, 2012-2020; Peterson's Undergraduate Survey, 2012-20; United States Census Bureau, 2018, and Bureau of Labor Statistics, 2019; United States Census Bureau, 2019).
 - According to a national survey from CareerBuilder, 78 percent of respondents that worked full-time continue to live paycheck to paycheck. The study substantiates current federal and academic surveys that college students, included within the study, suffer significant economic challenges while continuing their education. The College Foundation Office has expanded monetary assistance to students assisting these students in continuation of their educational goals. (Annual Survey of Colleges & Universities, 2012-20; National Center for Education Statistics, 2019; Wintergreen Orchard House Survey, 2012-20).
 - According to the Center for American Progress (2018), 15% of North Carolinians, under the age of 65, are living below the poverty line and did not have health insurance during 2016. Since 90% of FTCC students are between the ages of 19-55, the challenge of pursuing health insurance may impact future student persistence rates towards completion. More than 90% of FTCC students who qualify for financial aid had an estimated family contribution towards their educational goals below \$5,486 during the 2018-19 fiscal year further substantiating the local need for financial assistance. FTCC is one of the few North Carolina colleges that continues to provide loans to students to meet their financial needs while continuing to pursue higher education.

III. HIGHER EDUCATION PERSONNEL TRENDS

Analysis Summary

- Increasing federal regulations related to compliance are expected to continue.
- Increases in professional development activities are reported by employers across the nation.
- Continued monitoring of social media is required in the changing world.
- Employee shortages as the baby-boomer generation continues retiring are expected to increase demands for highly skilled employees, especially those that demonstrate requisite soft-skills.

Higher Education

- Data recently reported in the 2019 Survey of Colleges and Education Human Resources Officers from Inside Higher Ed are relevant to FTCC's HR planning and operations:
 - Human Resource leaders acknowledge that their institutions must offer appropriate due process protections for both full- and part-time employees. FTCC ensures that faculty and staff, regardless of employability status, are trained and understand due process rights, and have access to policies, procedures, and guidelines associated with equal opportunity.
 - HR Chief Administrators at 2-year colleges indicate they are paying more attention to the following measures (FTCC is pursuing enhancements in all of these areas):
 - Remaining proactive with ever-changing federal compliance and safety initiatives.
 - There are ongoing and significant enforcement modifications related to compliance with Title IX, stimulated by the "Me-too movement" from the federal government, including the White House, and Department of Education. Federal oversight is directed towards reducing sexual assault, sexual violence and sexual harassment on college campuses. The Department of Education continues to advocate equal rights be granted to both the accuser and accused in Title IX investigations and outcome decisions. FTCC has implemented policy and procedures to ensure compliance. (*American Medical Association Journal of Ethics*, 2018; *Behavioral Sciences*, 2018; *US Dept. of Education*, 2019).
 - The US Secretary of Education enacted changes regarding how federally funded colleges and universities respond to misconduct under Title IX. These changes recommend a higher standard of

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

evidence, mediation for sexual misconduct cases, punishing students for reports deemed to be false, and require cross-examination during hearings. (*Economics of Education*, 2019; *Inside Higher Ed*, November 2018; *New York Times*, November 2018; *The Seattle Times*, October 2018).

- Increasing emphasis related to professional development in technical skills, soft skills, safety, security measures, computer security controls, and changing federal regulations associated with compliance requirements.
- Increased emphasis on Cybersecurity Program policies and compliance.

IV. TECHNOLOGICAL TRENDS AND PLANNING ASSUMPTIONS

Analysis Summary

- Community college classroom technology continues to change with:
 - Expanded emphasis of student-centered teaching philosophies.
 - Continuously changing technological demands that enhances digital fluency in the 21st century workplace.
 - Expanded course offerings in information security, cybersecurity, and technology.
- Students and technology use continue to change with:
 - Connecting software tools with expected student learning outcomes.
 - Stronger demands for student learning data transparency.
 - Emphasis on reduced use of flash-drives being connected to education systems due to cybersecurity breaches.

Community College Classroom Technology Trend Analysis

- According to the New Media Consortium (NMC) Horizon Report 2019, the following are the most important technologies for colleges, including FTCC, to consider over the next five years. Campus Technology (2019) stated there were five trends to monitor in the coming year. The list of trends includes:
 - Blended Learning Designs
 - Growing Focus on Measuring Learning
 - Advancing Cultures of Innovation
 - Redesigning Learning Spaces
 - Rethinking How Institutions Work
 - Modularized and Disaggregated Degrees
- The NMC's top-ranked challenges expected for colleges in 2020 and beyond include:
 - Advancing Digital Equity – Expecting students to be able to learn and work anywhere, with constant access to learning materials and to one another.

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

FTCC has updated its Internet Technology (IT) infrastructure to support and ensure digital equity.

- Achievement Gap – Using and sharing data regarding student performance, engagement, and behavior to make data-driven decisions and create a holistic picture of student success across all disciplines. Through the College's annual Planning Cycle, ongoing annual assessments of student learning, programmatic outcomes, and academic program reviews, vast amounts of data are shared transparently at various levels of the College in real-time.
- The Evolving Roles of Faculty with Ed Tech Strategies – In order to fully engage in educational technology, training and professional development must be provided to facilitate incorporation of technology. The College provides professional development training regarding how to build digital classrooms and best practices for creating a student-centered learning environment. Training in Cybersecurity threats and preventive measures will be provided during 2020 to faculty, staff and administrators.
- Improving Digital Fluency – Colleges must recognize that simply understanding how to use a device or certain software is not enough; faculty, staff, and students must be able to make connections between the tools and the intended learning outcomes resulting from use of the technologies. FTCC continues to expand instructional software available for instructors and students to use that enhances learning and maximizes the expected learning outcomes to meet employer needs.
- Increasing Demand for Digital Learning Experience and Instructional Design Expertise – A shifting focus to student-centered learning, where the instructor acts as a guide, coach or facilitator began in 2018 and continues with the recent hiring of success coaches and career coaches. FTCC encourages teaching methods based upon best practices, with technology-based applications, that reflects the growing societal expectations in proper use of technology expected from higher education.
- Rethinking the Practice of Teaching – Similar to the challenge of evolving instructional roles of faculty, additional support needs to be provided in assessment of student learning outcomes as part of the faculty performance appraisal process. FTCC supports faculty development through professional development and evaluates assessment outcomes, retention data, grade distribution reports, and graduation data to determine where deficiencies may exist within the educational process.

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

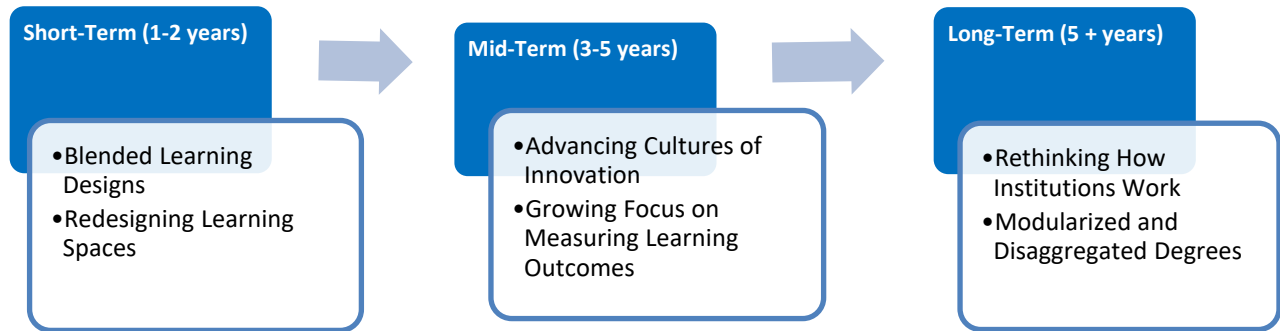


Figure 1: Recommended Community College Technologies and Time to Adoption

- FTCC has a Technology Plan that is annually evaluated and updated by the Technology Committee. This committee monitors technology trend data to identify areas of possible improvement in the short -, mid -, and long-term, as reflected in Figure 1 above.

Students and Technology

- According to a recent study by Georgetown University's Center on Education and the Workforce, educational institutions need to assist faculty in changing instructional techniques, assessment expectations, and skills development processes so that graduates can display and articulate the wide-ranging knowledge and technical and soft-skills expected by employers. The ability to measure learning outcomes supports competency-based hiring as the student transitions to the workforce or institutions of higher learning to continue advanced education goals. FTCC has collaborated with Campbell University in order to better train College faculty with assessing and developing student-learning and programmatic outcomes. (*Bulletin of Education and Research*, 2018; *Journal of Applied and Advanced Research*, 2018; *Journal of Information Systems Education*, 2019).
- Automation and artificial intelligence are beginning to replace jobs that once required human laborers. More technical training is needed to share knowledge, employment trends, soft-skills, and technical expertise now required, thereby, empowering people to better understand how to compete in the 21st century technological workforce. FTCC adopted the student-centered learning approach where the students lead class discussions and instructors facilitate as needed. The concept of "flipped classrooms" is spreading in popularity across different academic departments. FTCC also has funded faculty training in use of VALUE-Rubrics and assessments to enhance the educational learning from year to year. (*Computers & Education*, 2019; *Interactive Learning Environments*, 2019; *Journal of Service Research*, 2018).
- Cyber-crime is continuing to increase, affecting millions of Americans, requiring new technical skills of graduates. According to InfoSec Institute, there is an increase of cyber-attacks against organizations in almost every industry, including healthcare, education, energy, and retail. Recent cyber-attacks have also been reported against the largest credit reporting bureau in the nation. With this constant threat, the College has expanded its course offerings in the field of information security and has embarked on an extensive assessment of its own cyber-security defenses to sustain

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

records and reports. FTCC has been designated as a Center of Academic Excellence in Cyber Defense-2-year schools' category through 2023 by the NSA and DHS. (*Computers & Security*, 2019; *Deviant Behavior*, 2019; *The Wall Street Journal*, 2019).

- Table 4 demonstrates the changing demands for technology-assisted Curriculum and Corporate and Continuing Education courses at FTCC:

Table 4: Four-Year Analysis of Technology Assisted Courses at FTCC

Curriculum	2015-2016	2016-2017	2017-2018	2018-2019
Internet Classes	1,582	1,889	2,036	2,079
Hybrid Classes *	202	275	295	283
Web-Assisted Classes **	2643	2,560	2,087	1,841
Other Distance Learning Classes	38	28	25	13
Continuing Education	2015-2016	2016-2017	2017-2018	2018-2019
Internet Classes	902	1,009	1,013	846

* A course where the primary delivery is on-line with a requirement that students also meet in traditional face-to-face sessions as determined appropriate by the College.

**A course where the primary delivery is via traditional face-to-face with a requirement that students have Internet access as a supplemental part of the course.

V. SOCIETAL TRENDS AND PLANNING ASSUMPTIONS

Analysis Summary

- Projected Cumberland County demographic changes covering the period 2019-2024 will impact FTCC recruiting efforts (demographic changes).
 - Increased enrollment of students with disabilities and other special needs will require additional support and expanded professional development training to meet changing disability accommodations mandated for students, faculty, and staff.
 - Increasing enrollment of a diverse student population is anticipated.
 - Continued student, faculty, and staff training related to potential active shooter situations and other potentially violent attacks on campus will remain a priority.
 - Continued support resources for students, including career coaches and instructional coaches, will remain a priority and is part of the Quality Enhancement Plan covering the next five years.
- Cumberland County statistical data projects higher concentrations of non-majority demographics, as compared to all other counties, with an expansion in residents who identify as a member of two or more races (Hispanics and non-Hispanics), Black (Hispanics), and American Indian or Alaska Native (Hispanics). Trends reflect

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

increases in Hispanics across most demographic groups. The demographic groups projected to have the largest growth and possible declines are reflected below (Table 5):

Table 5: Cumberland County Resident Ethnicity Projections 2019-2024

Demographic*	2019 Population	2024 Population	% Change	# Change
Black, Non-Hispanic	124,304	128,267	3%	3,963
White, Hispanic	28,673	30,860	8%	2,187
Two or More Races, Non-Hispanic	13,189	14,394	9%	1,205
Asian, Non-Hispanic	9,157	9,792	7%	635
Black, Hispanic	6,481	6,994	8%	513
Two or More Races, Hispanic	2,948	3,278	11%	330
American Indian or Alaskan Native, Non-Hispanic	4,896	5,018	2%	122
American Indian or Alaskan Native, Hispanic	1,304	1,381	6%	77
Native Hawaiian or Pacific Islander, Hispanic	292	299	2%	7
Asian, Hispanic	413	410	(1%)	(3)
Native Hawaiian or Pacific Islander, Non-Hispanic	992	970	(2%)	(22)
White, Non-Hispanic	139,817	131,886	(6%)	(7,931)
Total	332,466	333,549	4%	1,083

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2020, 1st Quarter Demographic Profile. *Demographic categories are pre-selected by the National Center of Education Statistics, not FTCC.

- The U.S. workforce is getting older, which means employees will consider retirement or later in life job changes. In the US, 10,000 baby boomers turn 65 daily, a trend that began in 2011 and is expected to continue through 2030. Many workers are not retiring because of the benefits of working such as prolonged health and even keeping skills fresh by postponing retirement, and increasing financial stability.
- As older employees age out, employers must find ways to hire and maintain younger employees at a higher retention rate because many of the younger workers do not reflect the same longevity traits demonstrated by the baby-boomer population. (*American Economic Review*, 2019; *Human Resources Management Review*, 2019; *U.S. Bureau of Labor Statistics*, 2019).
- FTCC works closely with regional employers to ensure that programs of study align with job skills required for the 21st century workplace and short-term retraining programs are available for all students as the industry's potential workers.
- Cumberland County resident age change projections indicate the most growth potential, over the next five years, includes ages 65-69 followed by 30-34. There are strong indications of more residents in ages 65 to 86 with a decline in ages 25 to 64.

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

Table 6 provides all age groups in **ranked descending order based upon the last column on the right side of the chart.**

Table 6: Cumberland County Resident Age Projections 2019-2024

Age Group	2019 Population	2024 Population	% Change	# Change
65 to 69 years	13,682	15,651	14%	1,969
30 to 34 years	25,062	26,975	8%	1,913
70 to 74 years	10,445	12,026	15%	1,581
40 to 44 years	17,973	19,291	7%	1,318
75 to 79 years	7,378	8,490	15%	1,112
20 to 24 years	31,929	32,951	3%	1,022
80 to 84 years	4,911	5,502	12%	591
Under 5 years	25,236	25,812	2%	576
85 years and over	4,285	4,795	12%	510
35 to 39 years	21,597	21,676	0%	79
60 to 64 years	17,082	16,924	(1%)	(158)
10 to 14 years	21,367	21,193	(1%)	(174)
5 to 9 years	22,906	22,464	(2%)	(442)
15 to 19 years	23,126	22,492	(3%)	(634)
45 to 49 years	17,537	16,854	(4%)	(683)
50 to 54 years	17,573	16,520	(6%)	(1,053)
55 to 59 years	18,359	16,264	(11%)	(2,095)
25 to 29 years	32,019	27,669	(14%)	(4,350)
Total	332,466	333,549	2%	1,083

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2020, 1st Quarter Demographic Profile

- Based upon Table 6 data, the College should prepare for programs of study and associated support services necessary to meet the needs of senior students and young adult students (high school graduates up to age 25). FTCC age demographics are in line with national trends associated with the five different generations collectively in pursuit of either more education or actively seeking employment.

Students with Disabilities

- Community colleges continue to serve more persons with disabilities.
 - Twenty-Five percent of students enrolled at colleges and universities are classified as disabled. During the last 25 years, the number of disabled students enrolled in higher education has tripled. FTCC has not noted a significant increase in the numbers of disabled students; however, this may change in the next five years. The College has a strong accommodation process for students, faculty and staff. (*Disability and Society*, 2019; *Exceptionality*, 2019; *Stigma and Health*, 2019;).

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

- National data reflects that colleges and universities must create a more inclusive and supportive environment for students with disabilities. (*Accessibility and Diversity*, 2020; *Reading and Writing*, 2019; *Severe Disabilities*, 2020). FTCC continues to enhance disabled student accommodations via:
 - Web accessibility and ADA compliance in all electronic media.
 - An online form allowing users to make suggestions or report accessibility issues under an electronic “Accessibility Suggestions” form.”
 - Increased availability of counseling or referral services due to the specific nature of the impairment(s).
 - Assistive technology resources to assist students in pursuit of their education goals.
 - One-on-one assistance with a trained and experienced Disability Support Services Coordinator and support staff to identify and implement any reasonable accommodations a student may require.
 - Instructors and advisors are considered the most important professionals for timely notification of a student’s disability. Because it is imperative for them to recognize and understand a wide range of disabilities, professional development training has been provided in the past year, including one training session being led by a member of the Office of the Secretary of Education. The College continues to train faculty, staff, advisors, and administrators on the need to refer disabled students to the Disability Support Office for immediate assistance.
 - A survey of 1,500 collegiate academic advisors found that 83 percent advised students with disabilities while 47 percent had no technical training about how to help these students. FTCC instructors and advisors are trained to meet the changing disability support guidelines and regulations. Additionally, FTCC has incorporated the Course Quality Rubric into its ADA verification process. This rubric verifies courses are ADA compliant, or highlights areas that are non-compliant for rapid correction. (*Community College Journal of Research and Practice*, 2019; *Exceptionality*, 2019; *Journal of Black Studies*, 2019).
 - The Disability Support Services Coordinator provides referral for counseling services to students who need therapeutic treatment. FTCC will pay up to three counseling visits for students receiving treatment from Cape Fear Valley Medical Center.
 - During the 2019-2020 academic year, the Disability Support Services Coordinator created an Institutional Behavioral Assessment Team. This team provides a cross-functional, multidisciplinary point of contact for members of

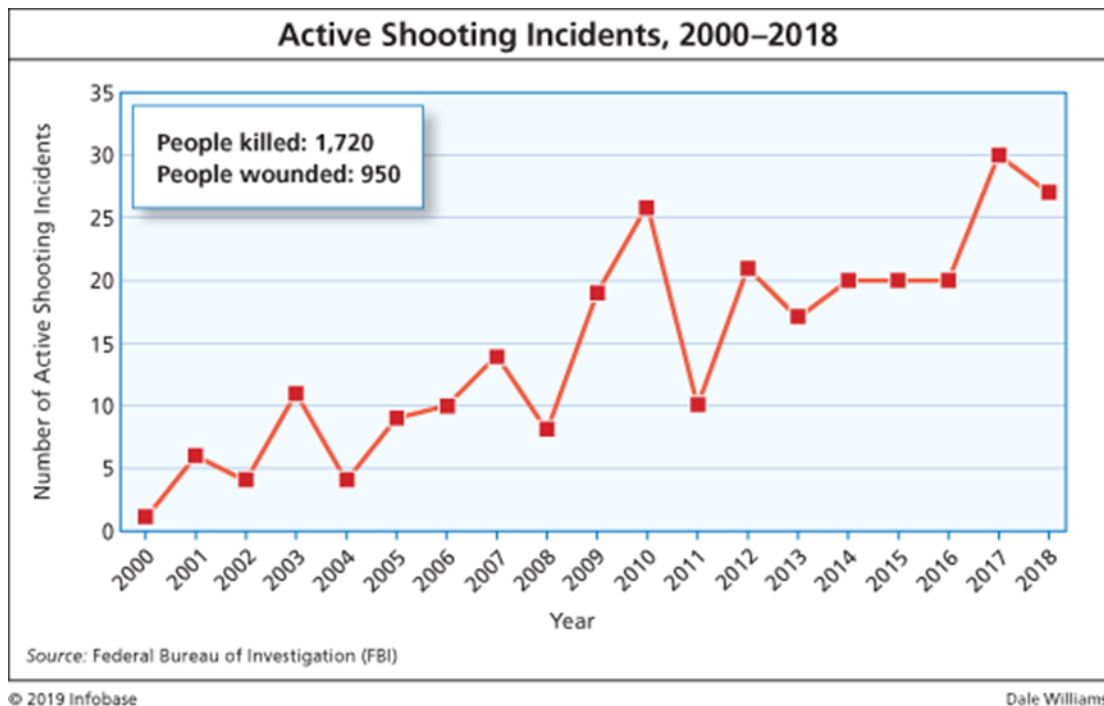
FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

the college community, who have encountered student behavior, which they perceive as unusual, threatening, or dangerous. The team determines if there have been additional warning signs or reasons for concern (such as code violations or classroom incidents), classify the level of the threat, and develop a plan of action. Examples of action can include possible reasonable accommodations such as referrals to appropriate campus offices and if necessary, off-campus agencies, for assistance and interim measures such as accommodations.

- FTCC serves a number of students who have been diagnosed with an autism disorder. More companies are hiring employees on the autism spectrum. For instance, Goldman Sachs is employing more people with the disorder for these reasons: 1.) the company desires to contact colleges that have students who are job searching. 2.) The company's work environment is designed to make it easier to accommodate those with disabilities. (*Autism*, 2019; *CNN Business*, 2019).

School Violence

- According to *American School & University* (2019), the majority of students who have committed deadly school attacks had a history of being bullied and/or previous disciplinary troubles. This requires ongoing professional development related to environmental awareness and immediate actions to lessen the possibility of injuries or death.



- School violence is rising, which includes sexual assault. A survey conducted by The Canadian Broadcasting Corporation (2019) stated that 1 out of 7 girls alleged they were sexually assaulted by another student. FTCC has expanded

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

training related to emergency management and prevention of sexual harassment/violence processes and procedures to prepare for unknown future events.

- As of 2020, all FTCC employees are required to annually complete active shooter and emergency management professional development training as a condition of continued employment. Employees must also complete professional development training associated with Title IX compliance on a 3-year renewal cycle to fully understand their responsibilities as designated reporters of potential violations of the law. New employees are provided both of these professional development training as part of their initial hire orientation.

Conclusion

- Colleges, including FTCC, must continue emphasize academic support activities designed to facilitate student success for diverse and aging populations of students.
- FTCC continues to meet the educational needs of currently enrolled students and remains vigilant in changing trends and projections to get ahead of student needs before they are needed. This includes the development of pathways to success using a multitude of educational opportunities, including short-term credentials, certificates, diplomas and associate degrees.
- Programs of study will continue to be added based upon current and projected job market demands for both short-term training and credentials and longer-term degree completion needs within the Fayetteville Metropolitan Service Area.
- The College fully supports active-duty military and their family members residing in locations across the globe. This support includes flexible class arrangements to meet demands of military service on short notice deployments. The College also continues to refine its Credit for Prior Learning to recognize prior military and non-military work experiences that qualify for educational credits.
- Students of all capabilities continue to be professionally served by highly trained and skilled instructors and support staff.
- FTCC has expanded local partnerships with the public-school systems and other colleges to offer a variety of programs of study necessary to meet the changing employment needs of students and businesses, including increased training in the area of soft-skills to supplement technical and professional training.
- FTCC remains diligent with enforcement of federal, State and local laws, rules, guidelines and policies, to reduce the potential for future litigation.
- The College continues to monitor financial revenues and expenditures to ensure that the College remains good stewards of taxpayer funds. In 2019, the College contracted for an economic impact study which will reflected strong stewardship of

FTCC 2019-2020 PLANNING ASSUMPTIONS AND TRENDS

taxpayer funding and positive impact for students and the community based upon the College's operations.

- It has been a good year for FTCC and these Planning Assumptions set the stage for continuous improvements over the next five years. As the College begins its upcoming continuous improvement activities, the College is pleased to share economic impacts created by College operations over the past three years, as reported by an outside organization in 2019:
 - FTCC's day-to-day operations spending added \$77.6 million in income to Cumberland County.
 - The College's construction spending had a substantial impact on the local county economy, equal to \$930.7 thousand in added income.
 - The average associate degree graduate from FTCC will see an increase in earnings of \$9,000 each year compared to a person with a high school diploma or equivalent working in North Carolina, which equates to a 20.1% average annual return on investment for FTCC students.
 - For every dollar of public money invested in FTCC, local taxpayers will receive \$4.10 in return, over the course of students' working lives.
 - For every dollar invested in FTCC educations, people in North Carolina will receive \$10.90 in return for as long as students remain active in the workforce (*EMSI Economic Impact Study*, 2019).