Environmental Scan 2014-2017
Presented by the Planning Council Strategic Planning Committee
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INTRODUCTION

Through a systematic strategic planning process, Daytona State College establishes long-term goals and strategies to support its mission and vision. By anticipating key external trends that may be driving forces in shaping the institution’s strategic plan, the college can anticipate and respond more effectively to the community and the constituencies it serves. To set the direction for the college during the 2014-2017 planning cycle, the Strategic Planning Committee, a subcommittee of the college’s Planning Council, identified external changes and influences that have implications for long-range planning and the future.

METHODOLOGY

The environmental scan is organized around five major areas of influence: demographics, workforce, higher education, instructional delivery, and political trends. Research was conducted through a variety of sources including the US Census, the Florida Department of Education, the University of Florida’s Bureau of Economic Research, Florida’s Economic and Demographic Research Department, and other databases and publications as noted in the text of the document. To align with the primary service area of Daytona State College, much of the research focuses on Volusia and Flagler counties and the state of Florida.
DEMOGRAPHIC TRENDS

State and Local Growth Predictions

Florida is the fourth most populous and the eighth most densely populated state in the nation, according to the University of Florida’s Bureau of Economic Research. US Census data indicated a 2010 state-wide population of 18,655,787. Although population growth is forecast to remain relatively flat averaging 0.85 percent by 2014, Florida is expected to reach a population of 20 million by 2016, surpassing New York as the third most populous state in the nation.

Volusia and Flagler counties, the primary service area for Daytona State College, had a combined population of 590,289 in 2010.

<table>
<thead>
<tr>
<th>Table 1: Local Area County Populations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flagler</td>
</tr>
<tr>
<td>2010</td>
</tr>
</tbody>
</table>

Source: US Census, 2010

Volusia County is the 11th most populous county out of 67 counties, comprising 2.6 percent of Florida’s population. Flagler County is the 36th most populous county with 0.5 percent of Florida’s population. Approximately 11.7 percent of the population in Flagler County resides in unincorporated areas.

<table>
<thead>
<tr>
<th>Table 2: Estimates and Projections in Population for Volusia and Flagler Counties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flagler</td>
</tr>
<tr>
<td>2012</td>
</tr>
<tr>
<td>2015</td>
</tr>
<tr>
<td>2020</td>
</tr>
</tbody>
</table>

Source: Florida Economic & Demographic Research, http://edr.state.fl.us/content/areaProfiles/county/flagle.pdf

According to the Florida Economic and Demographic Research Department, the population of Flagler County will increase by 20 percent by 2020. However, the population for Volusia County will grow at a much slower rate, with a projected increase of 4 percent by the year 2020.
Deltona is the largest incorporated city in Volusia County and the 24th largest city in population in the state. In Flagler County the most populous city is Palm Coast which ranks 30th largest in the state.

<table>
<thead>
<tr>
<th>Table 3: Flagler/Volusia Top 10 Cities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deltona</td>
</tr>
<tr>
<td>Palm Coast</td>
</tr>
<tr>
<td>Daytona Beach</td>
</tr>
<tr>
<td>Port Orange</td>
</tr>
<tr>
<td>Ormond Beach</td>
</tr>
<tr>
<td>DeLand</td>
</tr>
<tr>
<td>New Smyrna Beach</td>
</tr>
<tr>
<td>Edgewater</td>
</tr>
<tr>
<td>DeBary</td>
</tr>
<tr>
<td>South Daytona</td>
</tr>
</tbody>
</table>

Source: US Census, 2010

The city of Palm Coast, according to the Florida Office of Economic and Demographic Research, will increase in population nearly 40 percent by the year 2020. The largest population increases in Volusia County are expected in the smaller cities of DeBary, Daytona Beach Shores, Oak Hill, and Orange City.

Source: Florida Office of Economic & Demographic Research, http://edr.state.fl.us/content/area-profiles/county/flagler.pdf
The Metropolitan Statistical Area of Deltona-Daytona Beach-Ormond Beach is ranked the 8th largest metropolitan area in Florida and the 103rd largest metropolitan area in the United States as of the 2010 census. Daytona Beach is host to special events throughout the year that bring large groups of people from out of town to visit the area. Notable special events are Speed Weeks in February and July, Bike Weeks in March and October, and Spring Break in March and April. Tourism plays a major role in Volusia County’s economy. The proximity to beautiful beaches, Orlando and the theme parks make the Daytona Beach area a prime location for families. Daytona remains home to NASCAR headquarters and the Daytona International Speedway.

**Age Trends for Volusia and Flagler Counties**

The median age in Volusia County (45.3 years) is slightly younger than the median age in Flagler County (47.5 years). In 2010, females slightly outnumbered males in both Volusia and Flagler counties.

<table>
<thead>
<tr>
<th>Table 4: Median Age</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Volusia County</strong></td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td>Female</td>
</tr>
<tr>
<td><strong>Combined</strong></td>
</tr>
<tr>
<td><strong>Flagler County</strong></td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td>Female</td>
</tr>
<tr>
<td><strong>Combined</strong></td>
</tr>
</tbody>
</table>

*Source: 2010 U S Census*

Over the next five years, the change in population that is most significant for the College is a predicted decline in the number of people aged 40-49 years. This will likely impact the enrollment of adults seeking re-training or a mid-career change.

The 18 – 39 age groups cover the majority age group of Daytona State College students. The trends for Volusia County show that population growth for the 18 – 24 age groups will be stagnant over the next five years while moderate growth is predicted for the 24 -39 age groups. Numbers in red indicate a decrease in population from 2012 to 2018 for the 40 -54 age groups. The largest growth in number of people will occur in the 65 - 74 year age group.

According to the Florida Department of Education, Flagler County population projections show an overall increase for all age groups. The largest increase is expected in the over-65 age groups. The 20 – 39 age groups are expected to increase steadily with the 40 - 49 age groups showing the slowest rate of growth.
Table 5: Volusia and Flagler Counties by Age

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>00-04</td>
<td>27,340</td>
<td>29,633</td>
<td>2293</td>
<td>8.39%</td>
<td>4,805</td>
<td>6,291</td>
<td>1486</td>
<td>30.93%</td>
</tr>
<tr>
<td>05-09</td>
<td>28,295</td>
<td>31,092</td>
<td>2797</td>
<td>9.89%</td>
<td>5,066</td>
<td>6,633</td>
<td>1567</td>
<td>30.93%</td>
</tr>
<tr>
<td>10-14</td>
<td>30,250</td>
<td>31,979</td>
<td>1729</td>
<td>5.72%</td>
<td>6,269</td>
<td>7,037</td>
<td>768</td>
<td>12.25%</td>
</tr>
<tr>
<td>15-17</td>
<td>19,690</td>
<td>19,726</td>
<td>36</td>
<td>0.18%</td>
<td>4,494</td>
<td>5,181</td>
<td>687</td>
<td>15.29%</td>
</tr>
<tr>
<td>18-19</td>
<td>14,135</td>
<td>14,161</td>
<td>26</td>
<td>0.18%</td>
<td>2,254</td>
<td>2,602</td>
<td>348</td>
<td>15.44%</td>
</tr>
<tr>
<td>20-24</td>
<td>35,172</td>
<td>35,302</td>
<td>130</td>
<td>0.37%</td>
<td>5,412</td>
<td>6,695</td>
<td>1283</td>
<td>23.71%</td>
</tr>
<tr>
<td>25-29</td>
<td>31,397</td>
<td>33,363</td>
<td>1966</td>
<td>6.26%</td>
<td>4,857</td>
<td>6,227</td>
<td>1370</td>
<td>28.21%</td>
</tr>
<tr>
<td>30-34</td>
<td>27,836</td>
<td>31,966</td>
<td>4130</td>
<td>14.84%</td>
<td>4,515</td>
<td>6,213</td>
<td>1698</td>
<td>37.61%</td>
</tr>
<tr>
<td>35-39</td>
<td>28,717</td>
<td>31,556</td>
<td>2839</td>
<td>9.89%</td>
<td>5,086</td>
<td>6,170</td>
<td>1084</td>
<td>21.31%</td>
</tr>
<tr>
<td>40-44</td>
<td>32,529</td>
<td>31,672</td>
<td>-857</td>
<td>-2.63%</td>
<td>6,421</td>
<td>6,806</td>
<td>385</td>
<td>6.00%</td>
</tr>
<tr>
<td>45-49</td>
<td>38,407</td>
<td>34,899</td>
<td>-3508</td>
<td>-9.13%</td>
<td>7,871</td>
<td>8,101</td>
<td>230</td>
<td>2.92%</td>
</tr>
<tr>
<td>50-54</td>
<td>41,813</td>
<td>41,568</td>
<td>-245</td>
<td>-0.59%</td>
<td>9,055</td>
<td>10,349</td>
<td>1294</td>
<td>14.29%</td>
</tr>
<tr>
<td>55-59</td>
<td>41,161</td>
<td>47,115</td>
<td>5954</td>
<td>14.47%</td>
<td>9,753</td>
<td>12,377</td>
<td>2624</td>
<td>26.90%</td>
</tr>
<tr>
<td>60-64</td>
<td>38,766</td>
<td>46,280</td>
<td>7514</td>
<td>19.38%</td>
<td>9,946</td>
<td>13,386</td>
<td>3440</td>
<td>34.59%</td>
</tr>
<tr>
<td>65-69</td>
<td>32,170</td>
<td>42,924</td>
<td>10754</td>
<td>33.43%</td>
<td>9,232</td>
<td>13,405</td>
<td>4173</td>
<td>45.20%</td>
</tr>
<tr>
<td>70-74</td>
<td>26,334</td>
<td>34,861</td>
<td>8527</td>
<td>32.38%</td>
<td>8,084</td>
<td>11,785</td>
<td>3701</td>
<td>45.78%</td>
</tr>
<tr>
<td>75-79</td>
<td>22,693</td>
<td>25,414</td>
<td>2721</td>
<td>11.99%</td>
<td>7,107</td>
<td>9,347</td>
<td>2240</td>
<td>31.52%</td>
</tr>
<tr>
<td>80-84</td>
<td>18,925</td>
<td>19,164</td>
<td>239</td>
<td>1.26%</td>
<td>5,290</td>
<td>6,906</td>
<td>1616</td>
<td>30.55%</td>
</tr>
<tr>
<td>85-up</td>
<td>19,654</td>
<td>23,385</td>
<td>3731</td>
<td>18.98%</td>
<td>4,062</td>
<td>6,659</td>
<td>2597</td>
<td>63.93%</td>
</tr>
</tbody>
</table>

Source: Florida Department of Education

Race/Ethnicity Trends for Volusia and Flagler Counties

The Census Bureau collects race data in accordance with guidelines provided by the US Office of Management and Budget. People who identify their origin as Hispanic, Latino, or Spanish may be of any race. As shown in Table 6, White, Non-Hispanic citizens comprise 75.5 percent of the population in Volusia and Flagler counties. Hispanic individuals account for 10.75 percent, and the African American, Non-Hispanic population accounts for 10.2 percent of the population.

According to the Florida Office of Economic and Demographic Research, the Hispanic population is projected to increase in Volusia County by 27.6 percent by 2020. Other projections include an 8 percent increase in the White, non-Hispanic population and a 14.6 percent increase in the African American population.
A population decline is predicted in Volusia County for the White, non-Hispanic population between the ages of 40 - 54 and significant increases are predicted for the Hispanic population in the 55 - 74 and the 20 - 29 age groups.

Table 7: Percent Change Ethnicity for Volusia County, 2010 - 2020

<table>
<thead>
<tr>
<th>Age</th>
<th>Increase, White Non-Hispanic</th>
<th>% Change</th>
<th>Increase African-American, Non-Hispanic</th>
<th>% Change</th>
<th>Increase Hispanic or Latino</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-4</td>
<td>-16</td>
<td>-0.11%</td>
<td>181</td>
<td>5.07%</td>
<td>592</td>
<td>12.21%</td>
</tr>
<tr>
<td>5-9</td>
<td>-32</td>
<td>-0.21%</td>
<td>354</td>
<td>10.55%</td>
<td>360</td>
<td>7.40%</td>
</tr>
<tr>
<td>10-14</td>
<td>-666</td>
<td>-3.93%</td>
<td>737</td>
<td>20.17%</td>
<td>857</td>
<td>17.60%</td>
</tr>
<tr>
<td>15-19</td>
<td>-2493</td>
<td>-12.67%</td>
<td>31</td>
<td>0.63%</td>
<td>963</td>
<td>19.46%</td>
</tr>
<tr>
<td>20-24</td>
<td>-2736</td>
<td>-13.83%</td>
<td>-298</td>
<td>-5.54%</td>
<td>1350</td>
<td>32.51%</td>
</tr>
<tr>
<td>25-29</td>
<td>1073</td>
<td>6.05%</td>
<td>547</td>
<td>15.68%</td>
<td>1264</td>
<td>33.78%</td>
</tr>
</tbody>
</table>
### Table 7: Percent Change Ethnicity for Volusia County, 2010 - 2020

<table>
<thead>
<tr>
<th>Age</th>
<th>Increase, White Non-Hispanic</th>
<th>% Change</th>
<th>Increase African-American, Non-Hispanic</th>
<th>% Change</th>
<th>Increase Hispanic or Latino</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>30-34</td>
<td>3467</td>
<td>20.62%</td>
<td>1066</td>
<td>33.87%</td>
<td>267</td>
<td>6.79%</td>
</tr>
<tr>
<td>35-39</td>
<td>530</td>
<td>2.81%</td>
<td>244</td>
<td>8.02%</td>
<td>344</td>
<td>8.99%</td>
</tr>
<tr>
<td>40-44</td>
<td>-3896</td>
<td>-17.60%</td>
<td>244</td>
<td>8.09%</td>
<td>639</td>
<td>17.97%</td>
</tr>
<tr>
<td>45-49</td>
<td>-7770</td>
<td>-27.13%</td>
<td>-152</td>
<td>-4.64%</td>
<td>594</td>
<td>17.16%</td>
</tr>
<tr>
<td>50-54</td>
<td>-5987</td>
<td>-19.57%</td>
<td>-195</td>
<td>-6.25%</td>
<td>533</td>
<td>17.41%</td>
</tr>
<tr>
<td>55-59</td>
<td>2643</td>
<td>8.94%</td>
<td>498</td>
<td>19.07%</td>
<td>1130</td>
<td>47.60%</td>
</tr>
<tr>
<td>60-64</td>
<td>6108</td>
<td>20.18%</td>
<td>837</td>
<td>40.12%</td>
<td>1241</td>
<td>56.61%</td>
</tr>
<tr>
<td>65-69</td>
<td>8752</td>
<td>33.77%</td>
<td>881</td>
<td>56.15%</td>
<td>1025</td>
<td>59.59%</td>
</tr>
<tr>
<td>70-74</td>
<td>8619</td>
<td>41.02%</td>
<td>579</td>
<td>46.69%</td>
<td>913</td>
<td>66.59%</td>
</tr>
<tr>
<td>75-79</td>
<td>3423</td>
<td>19.38%</td>
<td>353</td>
<td>39.22%</td>
<td>292</td>
<td>28.83%</td>
</tr>
<tr>
<td>80-84</td>
<td>-1086</td>
<td>-7.47%</td>
<td>163</td>
<td>26.25%</td>
<td>169</td>
<td>23.31%</td>
</tr>
<tr>
<td>85+</td>
<td>675</td>
<td>5.03%</td>
<td>110</td>
<td>20.87%</td>
<td>382</td>
<td>67.73%</td>
</tr>
</tbody>
</table>

In Flagler County, the African-American population is projected to increase by about 53 percent by the year 2020, with the White population increasing by 38 percent and the Hispanic population by 40 percent. Sharp increases are expected for the Hispanic/Latino and the African American 20 – 29 and 40 – 59 age groups. The White, non-Hispanic, population between the ages of 40 and 54 shows the smallest growth.

### Table 8: Percent Change Ethnicity for Flagler County, 2010 - 2020

<table>
<thead>
<tr>
<th>Age</th>
<th>Increase, White Non-Hispanic</th>
<th>% Change</th>
<th>Increase African-American, Non-Hispanic</th>
<th>% Change</th>
<th>Increase Hispanic or Latino</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-4</td>
<td>399</td>
<td>12.90%</td>
<td>238</td>
<td>36.90%</td>
<td>282</td>
<td>42.66%</td>
</tr>
<tr>
<td>5-9</td>
<td>378</td>
<td>11.39%</td>
<td>139</td>
<td>18.34%</td>
<td>285</td>
<td>43.18%</td>
</tr>
<tr>
<td>10-14</td>
<td>926</td>
<td>25.72%</td>
<td>243</td>
<td>27.77%</td>
<td>235</td>
<td>33.05%</td>
</tr>
<tr>
<td>15-19</td>
<td>1442</td>
<td>39.43%</td>
<td>420</td>
<td>45.60%</td>
<td>304</td>
<td>45.10%</td>
</tr>
<tr>
<td>20-24</td>
<td>1486</td>
<td>53.45%</td>
<td>475</td>
<td>89.96%</td>
<td>425</td>
<td>92.39%</td>
</tr>
<tr>
<td>25-29</td>
<td>1458</td>
<td>46.60%</td>
<td>506</td>
<td>102.43%</td>
<td>345</td>
<td>72.48%</td>
</tr>
<tr>
<td>30-34</td>
<td>845</td>
<td>24.71%</td>
<td>210</td>
<td>37.77%</td>
<td>191</td>
<td>37.23%</td>
</tr>
<tr>
<td>35-39</td>
<td>1114</td>
<td>30.22%</td>
<td>147</td>
<td>23.48%</td>
<td>198</td>
<td>34.08%</td>
</tr>
<tr>
<td>40-44</td>
<td>750</td>
<td>17.61%</td>
<td>246</td>
<td>40.80%</td>
<td>304</td>
<td>63.07%</td>
</tr>
</tbody>
</table>
Table 8: Percent Change Ethnicity for Flagler County, 2010 - 2020

<table>
<thead>
<tr>
<th>Age</th>
<th>Increase, White Non-Hispanic</th>
<th>% Change</th>
<th>Increase, African-American, Non-Hispanic</th>
<th>% Change</th>
<th>Increase Hispanic or Latino</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>45-49</td>
<td>243</td>
<td>5.03%</td>
<td>334</td>
<td>55.30%</td>
<td>423</td>
<td>90.38%</td>
</tr>
<tr>
<td>50-54</td>
<td>357</td>
<td>6.72%</td>
<td>349</td>
<td>63.22%</td>
<td>295</td>
<td>66.29%</td>
</tr>
<tr>
<td>55-59</td>
<td>1232</td>
<td>21.42%</td>
<td>408</td>
<td>84.30%</td>
<td>253</td>
<td>59.95%</td>
</tr>
<tr>
<td>65-69</td>
<td>2951</td>
<td>46.99%</td>
<td>188</td>
<td>29.47%</td>
<td>156</td>
<td>38.33%</td>
</tr>
<tr>
<td>70-74</td>
<td>3532</td>
<td>71.92%</td>
<td>288</td>
<td>48.24%</td>
<td>104</td>
<td>27.96%</td>
</tr>
<tr>
<td>75-79</td>
<td>2442</td>
<td>69.10%</td>
<td>280</td>
<td>65.57%</td>
<td>114</td>
<td>44.19%</td>
</tr>
<tr>
<td>80-84</td>
<td>648</td>
<td>25.24%</td>
<td>207</td>
<td>66.77%</td>
<td>114</td>
<td>78.62%</td>
</tr>
<tr>
<td>85+</td>
<td>662</td>
<td>32.94%</td>
<td>244</td>
<td>102.95%</td>
<td>135</td>
<td>119.47%</td>
</tr>
</tbody>
</table>


Demographic Implications for Daytona State College

- Daytona State must be more responsive to the increasing ethnic Hispanic and Latino population in both counties. The Hispanic population is projected to grow 27 percent in Volusia County and 41 percent in Flagler County by 2020, with the largest increase in the 19 – 34 year age group.
- The largest city in Volusia County, Deltona, has the highest percentage of Hispanic and Latino population with 31 percent. The college must analyze the education, training, and employment goals of this ethnic population and offer relevant programs, especially at its Deltona campus.
- Flagler County is expected to experience a 53 percent growth in the African American population, with the highest increase in growth in the 20-29 age range. The college must analyze the education, training, and employment goals of this ethnic population and offer relevant programs, especially at its Palm Coast campus.
- Ethnic growth considerations should be part of the college’s marketing needs analysis. Recruitment strategies should focus on the needs of the Latino and African American populations, especially at the Deltona and Palm Coast Campuses.
- Daytona State must be conscious of the declining population in the city of Daytona Beach and recognize the potential growth in the cities in west Volusia and in Palm Coast.
- The college should continue all marketing and recruitment efforts to attract the 19 – 29 age groups.
- The Baby-Boomer generation is increasing as a percentage of the population and is looking for educational opportunities in cultural and continuing education.
To increase visibility in the community, the college should increase cultural activities targeted for various age groups in the New Journal Center and on regional campuses.
Workforce Trends

Occupational Projections

Job growth has been highest in the Transportation and Warehousing industry with an increase of 6 percent in 2012. Finance/Insurance and Administrative/Support/Waste Services each saw 5 percent growth, with Real Estate; Professional/Scientific/Technical Services; Management; and Accommodations/Food Services increasing 4 percent during the same year.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Mining, Utilities</td>
<td>3,232</td>
<td>3,257</td>
<td>25</td>
<td>1%</td>
<td>$88,919</td>
</tr>
<tr>
<td>Construction</td>
<td>15,729</td>
<td>15,231</td>
<td>(498)</td>
<td>(3%)</td>
<td>$58,861</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>20,515</td>
<td>21,190</td>
<td>675</td>
<td>3%</td>
<td>$83,025</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>13,718</td>
<td>13,763</td>
<td>45</td>
<td>0%</td>
<td>$64,463</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>31,805</td>
<td>31,613</td>
<td>(192)</td>
<td>(1%)</td>
<td>$31,013</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>14,473</td>
<td>15,304</td>
<td>831</td>
<td>6%</td>
<td>$50,112</td>
</tr>
<tr>
<td>Information</td>
<td>3,504</td>
<td>3,429</td>
<td>(75)</td>
<td>(2%)</td>
<td>$52,102</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>12,442</td>
<td>13,091</td>
<td>649</td>
<td>5%</td>
<td>$47,869</td>
</tr>
<tr>
<td>Real Estate and Rental and Leasing</td>
<td>9,528</td>
<td>9,893</td>
<td>365</td>
<td>4%</td>
<td>$23,628</td>
</tr>
<tr>
<td>Professional, Scientific, Technical Services</td>
<td>13,240</td>
<td>13,815</td>
<td>575</td>
<td>4%</td>
<td>$46,778</td>
</tr>
<tr>
<td>Management of Companies and Enterprises</td>
<td>1,644</td>
<td>1,710</td>
<td>66</td>
<td>4%</td>
<td>$82,098</td>
</tr>
<tr>
<td>Administrative, Support and Waste Services</td>
<td>14,856</td>
<td>15,552</td>
<td>696</td>
<td>5%</td>
<td>$29,202</td>
</tr>
<tr>
<td>Educational Services (Private)</td>
<td>5,184</td>
<td>5,150</td>
<td>(34)</td>
<td>(1%)</td>
<td>$32,230</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>26,802</td>
<td>27,307</td>
<td>505</td>
<td>2%</td>
<td>$48,421</td>
</tr>
<tr>
<td>Arts, Entertainment, and Recreation</td>
<td>6,273</td>
<td>6,437</td>
<td>164</td>
<td>3%</td>
<td>$25,083</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>17,339</td>
<td>18,033</td>
<td>694</td>
<td>4%</td>
<td>$17,295</td>
</tr>
<tr>
<td>Government</td>
<td>34,274</td>
<td>33,931</td>
<td>(343)</td>
<td>(1%)</td>
<td>$59,555</td>
</tr>
<tr>
<td>Unclassified</td>
<td>16,316</td>
<td>16,175</td>
<td>(141)</td>
<td>(1%)</td>
<td>$30,018</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>260,874</strong></td>
<td><strong>264,879</strong></td>
<td><strong>4,005</strong></td>
<td><strong>2%</strong></td>
<td><strong>$46,487</strong></td>
</tr>
</tbody>
</table>

Source: EMSI Complete Employment – 4th Quarter 2012

By June 2013, the Volusia County unemployment rate had decreased to 7.3 percent, a level just below the state average. According to a 2013 Volusia County Florida Data Report, 26,700 individuals were actively seeking work in Volusia County, including many who were underemployed as well as those who were unemployed. More than two-thirds (69%) of the job seekers were laid off or their jobs were eliminated.

In neighboring Flagler County, the 10.2 percent unemployment rate reported in June 2013 was significantly higher than the state average of 7.4 percent.
Unemployment Impact

<table>
<thead>
<tr>
<th>Table 10: Average Labor Force Statistics, June 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volusia</td>
</tr>
<tr>
<td>Employment</td>
</tr>
<tr>
<td>Unemployment</td>
</tr>
<tr>
<td>Unemployment rate</td>
</tr>
</tbody>
</table>


The table below ranks the largest employers in Volusia County based on the number of workers employed. It is based on an e-mail survey sent by Volusia County Economic Development to businesses and organizations. Only companies responding to this survey are included on the list.

<table>
<thead>
<tr>
<th>Table 11: Top Employers in Volusia County, 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Business/Organization</td>
</tr>
<tr>
<td>Volusia County Schools</td>
</tr>
<tr>
<td>Halifax Health</td>
</tr>
<tr>
<td>Florida Hospital – All Divisions</td>
</tr>
<tr>
<td>Volusia County Government</td>
</tr>
<tr>
<td>Publix</td>
</tr>
<tr>
<td>Wal-Mart</td>
</tr>
<tr>
<td>State of Florida</td>
</tr>
<tr>
<td>Daytona State College</td>
</tr>
<tr>
<td>US Government</td>
</tr>
<tr>
<td>Embry-Riddle Aeronautical Univ.</td>
</tr>
</tbody>
</table>


Economic Implications for Daytona State College

- Daytona State College must continue to develop certificate, associate, and baccalaureate degree programs to meet the workforce demands of the local economy.
- Local workforce needs analyses should be conducted to determine how well the college is meeting current demand with its educational programs and to identify potential new programs to offer.
- The college should identify and address the training needs of unemployed and underemployed persons, especially in Flagler County where the unemployment rate continues to be higher than the state average.
- The college should identify and address the training needs of the healthcare, government, and education employment sectors that represent the largest employers in the area.
HIGHER EDUCATION TRENDS

Decisions Affecting College Selection

The Lawlor Group, a higher education research and consulting firm, has identified 10 higher education trends for 2013 which are affecting the way that students select which college to attend, how the public perceives the value of education, the changing demographics of our student population, and how technology is influencing students’ expectations (The Lawlor Group, 2013). Key trends are summarized below.

Diminishing American household wealth and price valuation

- Many families are experiencing a diminished ability to pay for a college education. Compared to pre-recession levels, median household income, home equity, and net worth are all down. Meanwhile, college tuition costs have continued to climb steadily, even after financial aid is factored in. The annual net price of tuition, fees, room, and board at a private nonprofit institution ($23,840) now averages almost half of what the median household earns in a year.

- More families are reevaluating the price they are willing to pay for a college education. The cost of a college education is bumping up against the ceiling of what families will consider paying. Even students from upper-middle-income families are experiencing higher levels of student debt and factoring in the cost of post-graduate study and the return on investment of majoring in certain fields.

- Families are seeking evidence of successful results to justify their college investment. Higher education has become less an end in itself and increasingly a means to an end—primarily an economically viable career path. In calculating a college’s value proposition, families factor in outcomes as well as cost and prestige. They expect proof of high graduation rates and graduate employment at acceptable salary levels.

The “Value Gap Problem” in Public Perception

- Media coverage and legislative attention are shaping public opinion about the value of a college degree. While an overwhelming majority of the public believes a college education is necessary to get ahead, far fewer people believe going to college at any price will be worth the financial investment. Government funders are likely to make their appropriations contingent upon institutional performance measures.

Changing Demographics of Students

- The number of high school graduates is shrinking, but the proportion that is ethnically diverse is growing. The country’s changing demographics, combined with a widening gap between the nation’s rich and poor, mean more first-generation students and students from low socioeconomic backgrounds find paying for college a challenge and
are often underprepared for college-level study. The population continues to grow more culturally diverse. More than one-in-six new marriages today, or around 15%, take place between people from different race or ethnic groups, according to a report from the Pew Research Center’s Social and Demographic Trends project that uses data from the Census Bureau’s American Community Survey.

- **Non-traditional-age students still represent a largely untapped market.** During the economic recession, more people age 25 and older returned to college, but that bump reached its peak in 2010. Non-traditional students are also more likely to drop out in their first year, so they seek convenient course scheduling, assistance in the financial aid process, tutoring and counseling services, and centers for veterans.

- **More students are attending multiple institutions in their pursuit of a degree.** Transferring is increasingly becoming a cost-conscious part of students’ long-term plans to affordable degree completion. A majority of students who transfer from a private nonprofit institution attend two-year public institutions, with four-year public institutions being the second most popular destination.

### Technology Influencing Student Expectations

As access to technology for children and teens increases, traditional education institutions must find ways to integrate technology into instruction. Colleges must find ways to engage students who are already well-versed with online learning environments. According to Pew Research Center’s Internet and American Life Project, smartphone adoption among American teens has increased substantially and mobile access to the internet is pervasive, with 37 percent of teens in the US having a smartphone. One in four teens are “cell-mostly” internet users, who say they mostly go online using their phone and not using some other device such as a desktop or laptop computer.

- **Growth in mobile online access and social media use is allowing people to instantly verify any claims a college makes.** “Generation C” (the C is for “connected”) is not bound by age brackets, but rather by shared behavior, especially their use of real-time social, local, and mobile (SoLoMo) technology. They find it increasingly easy to investigate institutions’ reputations via online networks, word-of-mouth recommendations, and other communication channels beyond the colleges’ direct control.

- **The widespread use of data analytics in other industries is leading students to expect personalized and relevant communications.** The digital information that can be captured about students, whether they explicitly make their interest known to a college or not, has enhanced targeting capabilities. For institutions known for providing personal attention, families are quick to note any disconnects in that brand attribute during the admissions process.
• The proliferation of massive open online courses (MOOCs) is drawing attention to how college credits are awarded. All types of online and hybrid courses are thriving as the marketplace seeks cost-effective access and convenient delivery, and the American Council on Education is determining whether some MOOCs are similar enough to traditional college courses that they should be eligible for transfer credit.

Rising Student Veteran Population

US colleges are experiencing the biggest flood of military veterans returning for higher education since WWII. Many colleges are finding that their military student populations have doubled or tripled since 2009. “Between 250,000 to 400,000 veterans are leaving the military every year . . . and one in four will go to college within the next two years” (Lambeck, 2012). According to the US Bureau of Labor Statistics, unemployment remains another factor driving veterans back to college. Unemployment rates among veterans ages 18-24 was 30 percent in 2011, versus 18 percent for non-veterans of that age range.

Most returning veterans are taking advantage of the Post-9/11 GI Bill: educational benefits covering “tuition, fees, a $500 book allowance, and a basic housing allowance of up to $1500 per month, regardless of the school the veteran chooses to attend” (Welter, 2013). Benefits often take up to two months to kick in, making the first semester even more of a difficult transition for veterans (Lambeck, 2012). In 2011, 441,000 veterans applied for the Yellow Ribbon Program, designed to pay the difference in tuition between public and private colleges. Some states are even waiving tuition altogether for returning veterans. Veteran enrollment at both private for-profit universities and community colleges surpassed enrollment at traditional, public universities (Welter, 2013). According to the US Veterans Administration, the number of GI Bill beneficiaries (both veterans and dependents) catapulted in 2012 to 945,052, up nearly 400,000 since 2008.

According to Washington University, predictions indicate that Post 9/11 conflicts and the new GI Bill will increase the number of veterans with disabilities on two-year college campuses. Many veterans return home not only with physical injuries but also with brain trauma and post-traumatic stress disorder, any of which can impact success in educational pursuits. Postsecondary institutions need to be prepared to assist veterans to adjust to not only academic pursuits but transitioning back to civilian life including, “social adjustments, financial burdens, and reluctance to disclose disabilities” (University of Washington, 2011). Colleges will need counseling services and training for faculty and staff to specifically accommodate this growing population’s unique demands.

In Volusia County there are approximately 70,000 veterans (including active duty guard, reserve and retirees); in Flagler County, there are approximately 10,000 veterans.
Daytona State College’s own population of veterans has more than doubled from 252 enrolled in 2008 to more than 650 students certified as receiving benefits in 2013. The Veterans Center, which opened in 2012, provides veterans with a place to interact with other veterans, access computer resources, study, and connect with needed community resources. As the veteran population continues to grow on campus, the college will need to continue to provide comprehensive services through the Center, providing veterans with an easier transition to college.

**Increasing Social Media Usage**

*Faculty Social Media Usage Growing*

Faculty find value in social media as a learning resource. According to the Education Resources Information Center, a survey of more than 2,000 faculty showed that at least 90 percent of those surveyed were aware of the major social media sites, with Facebook, Twitter, YouTube, and blogs taking highest recognition ratings (Moran, et al., 2011). More than 75 percent of faculty surveyed visited a social media site within the past month for personal use, and nearly one-half posted content to at least one site. Even more impressive is that over 80 percent of faculty respondents were using some form of social media within their courses. “For personal use, Facebook is both the most visited site and, by a large margin, the one with the highest rate of postings” (Moran, et al., 2011). YouTube ranks second in the number of views. Thirty percent of faculty posted social media content for students to view, 40 percent incorporated social media into course assignments, and 20 percent actually assigned comments or postings on social media sites. Eighty percent of faculty utilize online video in classes making video the most commonly used type of social media for class sessions. Surveyed faculty remain concerned about the “integrity of student submissions” and “privacy” related to social media usage.

*Students Use of Social Media and Technology*

Interestingly, a study of social interactions among college students, conducted by Baym and Zhang, showed that 64 percent of students surveyed actually preferred face-to-face interaction, followed by phone and Internet respectively. Email trumped as the most preferred method of online contact, followed by chat and instant-messaging (Baym, et. Al, 2004).

The popularity of social media continues to rise because interaction commences at the user’s own rate and time allowing the user the ability to determine when and to whom they respond. 72 percent of all college students indicate having a social media profile, with 45 percent visiting at least one site per day, with numbers increasing daily (Sponcil, n.d.). Students generally tend to use social media to connect with acquaintances, converse with other students, and communicate with multiple people at once. About 57 percent of all social network users are 18-29 years old, optimizing multiple social media websites (Lenhart, et. al, 2010).
Findings show that over 50 percent of students visit social media sites several times throughout the day, spending an average of 30 minutes per day socializing, usually between 9 p.m. to midnight (Pempek, 2009). Women are more likely to have a personal profile on Facebook, but men are more likely to sustain a profile on LinkedIn (Lenhart, et al, 2010).

Offering real-time opportunities for collaborative learning through social media allows students to make connections that were not available previously, thus providing more exposure and expanding contacts (Brea, 2013). Institutions must provide clear user polices to both faculty and students who use these tools (Winske, 2013).

**Higher Education Implications for Daytona State College**

- Daytona State College will need to continue marketing access, flexibility, and cost savings to potential students and emphasize how students will gain the largest return on their investment.
- Marketing efforts will need to optimize social media venues in recruiting the 18-30 year old age sector.
- Daytona State College needs to keep its website up-to-date and ensure accuracy to maintain credibility with today’s tech-savvy prospective student.
- Daytona State College should consider a marketing campaign directly targeting returning college veterans. The college should continue to find ways to make the transition to college as seamless as possible for veterans, especially those who may be affected by physical or psychological injuries.
- Realizing that our traditional-aged student population makes increasing use of social media to connect and engage, faculty will need to consider ways to use the technology to engage students as well as to keep current with faculty from other institutions.
INSTRUCTIONAL DELIVERY TRENDS

The Changing Landscape of Higher Education

The world of instructional delivery is one of the most rapidly changing areas in higher education today. Two trends likely to have a significant impact on Daytona State College are the growing demand for online learning and the development of Massive Open Online Courses (MOOCs). As online learning and MOOCs grow in popularity among students, more faculty will need to adapt their instructional delivery to these new educational options. Other technology-based strategies are also growing in higher education.

Online Learning

Distance learning has been part of most higher education institutions for many years and initially took the form of videos and recordings that could be watched by the student at any time. As technology progressed it allowed for two-way audio and video so students could be anywhere the connection could be made. These early distance learning options have become obsolete as the Internet and improved technology have taken over the online market.

A national study entitled, Going the Distance, Online Education in the United States 2011, found 65 percent of all 2,500 responding institutions reported that online learning was a critical piece of their long-term strategy. Other evidence concludes the rate of growth of online enrollments has tempered somewhat but continues to exceed the rate of growth for all higher education student populations. Over 6.1 million students were taking at least one online course during the fall 2010 term, an increase of 560,000 students over the previous year.

This is comparable to the growth at Daytona State College as reflected in the enrollment chart below.

<table>
<thead>
<tr>
<th>Year</th>
<th>Face to Face #</th>
<th>Face to Face % Diff</th>
<th>Distance Education</th>
<th>Distance Education % Diff</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Hybrid</td>
<td></td>
</tr>
<tr>
<td>2005/06</td>
<td>16,472</td>
<td>-2.5%</td>
<td>919</td>
<td>2,281</td>
</tr>
<tr>
<td>2006/07</td>
<td>17,411</td>
<td>5.7%</td>
<td>1,048</td>
<td>3,002</td>
</tr>
<tr>
<td>2007/08</td>
<td>19,118</td>
<td>9.8%</td>
<td>2,562</td>
<td>4,454</td>
</tr>
<tr>
<td>2008/09</td>
<td>19,669</td>
<td>2.9%</td>
<td>3,641</td>
<td>7,236</td>
</tr>
<tr>
<td>2009/10</td>
<td>22,000</td>
<td>11.9%</td>
<td>3,278</td>
<td>9,565</td>
</tr>
<tr>
<td>2010/11</td>
<td>22,485</td>
<td>2.2%</td>
<td>3,477</td>
<td>11,137</td>
</tr>
<tr>
<td>2011/12</td>
<td>19,557</td>
<td>-13.0%</td>
<td>3,461</td>
<td>11,339</td>
</tr>
<tr>
<td>2012/13</td>
<td>17,674</td>
<td>-9.6%</td>
<td>4,006</td>
<td>11,188</td>
</tr>
</tbody>
</table>

Source: DSC IR Department, Core Performance Indicators associated with Annual Plan, www.daytonastatecollege.edu/ir
Table II shows a decrease in face-to-face and an increase in both hybrid and online learning. The question to examine is if the students are being successful. Stepping Up, The Florida College System Strategic Plan includes two performance indicators for Goal 2: Enhance Distance Learning. The indicators are the percentage of students enrolled in online/distance learning courses and the percentage of students earning a grade of “C” or better in traditional, online and hybrid courses. The initial data, as shown in Table 12, clearly reflect the growth in enrollment in online/distance courses and indicate that students are more successful in the hybrid courses.

<table>
<thead>
<tr>
<th>Table 12: DSC Core Performance Indicator for Distance Education</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2009/10</strong></td>
</tr>
<tr>
<td>% of students enrolled in online/distance education</td>
</tr>
<tr>
<td>% of students earning a grade of &quot;C&quot; or better</td>
</tr>
<tr>
<td>Traditional</td>
</tr>
<tr>
<td>Online</td>
</tr>
<tr>
<td>Hybrid</td>
</tr>
</tbody>
</table>

Source: DSC IR Department, www.daytonastatecollege.edu/ir

Massive Open Online Courses (MOOCs)

Massive open online courses, or MOOCs, have caught fire in academia. They offer, at no charge to anyone with Internet access, what was available only to those who are admitted to college and pay tuition. Although still early in development, most MOOCs currently use recorded lectures to convey course content and use digital auto graders to grade assignments. Thousands of students enroll but only about 10 percent pass.

The Ivy League colleges were among the first to develop MOOCs. Today 33 universities have joined in offering MOOCs and accepting credit for them. MOOCs do not have admission requirements; they are usually free with no risk to the student, no faculty development, no student support, and no credit unless a college has agreed. As MOOCs gain a foothold in academia, colleges will need to find ways to address the acceptance of credit through portfolio, testing or other methods.

Bring Your Own Device

An increase in the use of tablets and mobile phones in education provides an environment of “always connected” learners. The increase of wireless devices puts pressure on campus Wi-Fi systems and networks. Systems and networks are expected to perform despite the growth, and fast changes must be made to keep up with demand (Brea, 2013). IT departments at institutions need to choose learning platforms that support mobile and tablet devices because
institutions lacking a good mobile platform may not remain competitive. A new way to enhance the student experience with mobile devices is for a college to create its own public mobile application. The app can deliver important campus information such as news, athletic updates, and maps (Winske, 2012). Institutions should develop more apps with push alerts for email and newsletters and let students and faculty access information using their mobile devices (Brea, 2013). In addition to improved Wi-Fi and networks for tablet use, institutions need to design software for tablets. Best practice guidelines for faculty teaching with tablets also are needed (Johnson et. al, 2013).

**Personal Learning Environments**

According to Educause (2009), Personal Learning Environments (PLE) are the tools, communities, and services that constitute individual educational learning platforms. Learners use PLEs to direct their own learning and learners communicate with others to achieve learning goals. While most PLEs are online, the term encompasses the set of resources that a learner uses to answer questions, provide content and illustrate processes. It is not one specific service or application, but rather an idea of how individuals approach the task of learning.

Educause (2009) also explained that educators encourage learning by having students create PLEs where they can post reflections on course work and add digital content. They can then return to it, share it and repurpose it in other tools. Faculty might invite students to explore freely available stand-alone services that let users store and share information and connect to peers and their collections of resources. PLEs are important because they provide students with alternatives to libraries, textbooks and Learning Management Systems. Students draw connections from resources that they select and organize and this promotes authentic learning by incorporating expert feedback into learning activities and resources.

**Learning Analytics**

Collection of data will go beyond academic performance and will assist in building complete student profiles (Brea, 2013). The use of student data reveals at-risk learners as well as trends and patterns in student retention and student success (Johnson et al., 2013). Analysis of educational data helps institutions make significant, real-time changes in student learning. Analysts drawing conclusions from the data can implement necessary revisions and changes to courses and assignments sooner (Johnson et al., 2013). Institutions will be able to use the data to develop internal models that determine the student characteristics that most likely impact educational success (Brea, 2013).

**Wearable Technology**

Wearable technology refers to devices that can be worn by users. These can be in the form of jewelry, sunglasses, backpacks or clothing (Johnson et al., 2013). The benefit is that it can
integrate tools, devices, power needs and connectivity with a user’s life. Wearable technology is still relatively new, but accessories such as gloves enhance the user’s ability to feel or control something. Clothing can charge batteries via solar cells or collect data on individuals’ exercise habits from sensors embedded in their shoes. The consumer sector is using this technology faster than educational institutions, but the education sector is beginning to experiment with and implement wearable technologies. For example, a piece of jewelry could alert students working in chemical laboratories to hazardous conditions. Wearable cameras can capture photographs or data about a user’s surroundings on geology digs. Information can be sent via text, email and social networks based on the commands or gestures of the user. These can help students and educators communicate and keep updated with each other. Advancements in wearable flexible displays that can wrap around furniture and other curved surfaces or can be integrated into clothing could make smartphones and tablets obsolete (Johnson et al., 2013).

**Instructional Delivery Implications for Daytona State College**

- Daytona State College must embrace the use of technology to enhance learning and to increase access and convenience for students. Improved delivery of online learning will be critical to future competitiveness.
- Online learning can reduce facilities costs and create other operational efficiencies that allow for cost savings and increased revenue.
- MOOCs are a growing trend and whether the college can or will offer credit for them could impact enrollment and competitiveness.
- Daytona State College should actively address the growing demand for anytime, anywhere learning and communication.
POLITICAL TRENDS

Florida’s Political Climate

The state of Florida is implementing many changes within its higher education system intended to improve student access, attainment, retention, and success. At the same time, accountability is at the forefront of the Florida College System Strategic Plan, establishing benchmarks and targets for colleges based on system-wide performance indicators.

The higher education paradigm is shifting. Florida’s public institutions of higher education will be impacted by the following trends as a result of legislative and administrative policy changes:

- The four primary objectives for post-secondary institutions in the Florida College System are expanding access, reducing system and student costs, strengthening the link between the labor market and postsecondary education, and enhancing the student experience.
- The focus is on student retention and graduation rates; increasing STEM degree production and degrees in areas of strategic emphasis; and maintaining open access, availability of courses, and affordability while decreasing student indebtedness.
- Institutions of higher education must use national best practices and continuous evaluation of teaching and student support methods to increase student success and shorten time to degree.
- Students needing developmental education/remediation will be provided with a more individualized program of study. Students testing close to the test cut scores and/or demonstrating a high grade point average while in high school will be placed in blended gateway courses for credit whenever possible.
- An increasing number of adults returning to higher education will mean that more education credit will be awarded based on competency and skills attained through life experiences. Institutions of higher education may consider alternative methods for students to earn credit, moving away from time-based learning and the use of clock-to-credit hour conversion, toward demonstrated mastery of core competencies.
- The state system of higher education is more closely aligning degree program offerings to the economic development and workforce needs of the state. Matching Standard Occupational Classification codes to Statewide Course Numbering System codes will improve tracking of graduation and job placement, enrollment projections and industry demand.
Federal Issues Affecting Higher Education

Congress is working on the implementation of new metrics to measure and track student transition, progress, and success in college or certificate programs and in the workplace. Congress also has a long list of complex education legislation to renew. Pending renewals impacting higher education include

- **Carl D. Perkins Career and Technical Education Act:** Governs vocational education programs and is the largest federal program for high schools. *Last renewed in 2006.*
- **Education Sciences Reform Act:** Governs the Institute of Education Sciences. *Last renewed in 2002.*
- **Head Start Act:** Governs a nearly $8 billion program that offers early-childhood education services to low-income families. *Last renewed in 2007.*
- **Higher Education Act:** Governs teacher education programs, as well as student financial aid and college-access programs, including GEAR-UP and TRiO. *Last renewed in 2008.*
- **Individuals with Disabilities Education Act:** Governs special education programs. *Last renewed in 2004.*
- **Workforce Investment Act:** Governs job training programs. *Last renewed in 1998.*

Failure to fund any of these programs/initiatives would impact Daytona State College’s ability to reach the most vulnerable student populations, including those representing the first generation in college.

Pell funding faces reauthorization after 2015 and efforts are underway to standardize student loan rates, maintain the Pell Grant at current levels, and index it to inflation. Congress also is working on how to deal with the current and continuing influx of non-legalized immigrants and their ability to earn higher education credentials.

**Political Implications for Daytona State College**

- Data driven decisions will be imperative to measuring success as the state and federal government and the public will be focused on results and fiscal accountability.
- Public-private partnerships for funding and program development are increasingly important.
- Programs that monitor and seek to reduce the college’s student loan default rate will protect the availability of Federal Financial Aid for future students. If financial aid becomes harder for students to access, other resources must be made available.
- Daytona State College should adapt to changes and adopt best practices regarding time-to-degree, online learning, and student-centric teaching strategies.
REFERENCES


EMSI Complete Employment – 4th Quarter 2012


