

# Owens Location Feasibility Briefing

FEBRUARY 2024

Trellis  
Strategies

# Trellis Strategies

Trellis Strategies is an experienced research partner dedicated to advancing education and workforce development.

With nearly 40 years of expertise, we specialize in qualitative and quantitative research services, including surveys, interviews, focus groups, and case studies.

Our proficiency in qualitative research and quantitative analyses enables us to extract insights from extensive datasets, guiding strategic decision-making in areas such as student success and outcomes.

Our expertise extends to diverse fields including data analysis, market research, policy analysis, and more. We address topics such as adult learners, student finances, and institutional effectiveness.

Trellis Strategies offers a collaborative approach to data-driven decisions, contributing to positive transformations in education and workforce development.



EVALUATION



ANALYTICS



DATA COLLECTION



CUSTOM RESEARCH

495

REPORTS  
IN FY 2023

3.5+

MILLION  
STUDENTS SURVEYED  
SINCE 2018

30+

THREE DECADES OF  
ORGANIZATIONAL RESEARCH  
EXPERIENCE

# Understanding the modern learner

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We focus on the **modern learner**.

**Nonlinear Educational Pathways**



**High Expectations of Institutions**



**Basic Needs Considerations**



**Post-Secondary Trust Issues**



**Outcome-Oriented**



**Shifting Perceptions of Value**



# Project Scope

# Transportation and Location Assessment

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Assist in answering the following questions:

- What regions of the City of Toledo are potentially best suited for an expansion of Owens' physical footprint?
- What are the transportation barriers faced by Owens' students?

Methods:

- Analyzing Owens provided data to determine location impact on likelihood to enroll
- Analyze commute times, enrollment in online courses, and access to public transportation
- Survey data to understand the transportation related barriers that students face

Deliverable:

- Recommended zip codes for Owens consideration

# Regional and Institutional Enrollment Assessment

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Assist in answering the following questions:

- What regions of the City of Toledo are potentially best suited for an expansion of Owens' physical footprint?
- What are the barriers to student enrollment that contribute to the creation of enrollment deserts?
- What are the major employers and in-demand occupations in the area? What educational/training programs can fill these in-demand occupations?

Methods:

- Analysis of Current Enrollment Trends and Projections of Potential Students
- Understanding of Enrollment Deserts with a Special Focus on 25+ Population
- Assessment of Current Employment and Education Footprint

Deliverable:

- Trellis will deliver a report that details the aggregated opinions, insights, and findings gathered through this process, including current and historical enrollment trends, enrollment deserts, and the current footprint of the college and its competitors.

# City of Toledo Overview and Attainment Opportunity Spotlights

# Enrollment Trends Worse in Toledo

## Enrollment 2013-2022

Year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Change	% change
Owens	26,476	23,460	20,029	18,341	16,736	16,194	15,313	14,219	11,986	11,726	-14,750	-56%
Lucas	11,390	9,764	6,262	4,762	8,394	7,431	7,001	6,977	5,757	4,981	-6,409	-56%
Toledo	8,096	6,770	5,683	4,925	4,572	4,522	3,964	3,619	3,001	2,819	-5,277	-65%

Source: Trellis' calculation from data provided by Owens Community College IR Department



# Enrollment Decline in Downtown Area

Enrollment from Toledo 2013 and 2023

Zip code	2013	2022	Change	% change
43604	237	53	-184	-78%
43605	714	189	-525	-74%
43606	437	185	-252	-58%
43607	651	161	-490	-75%
43608	389	73	-316	-81%
43609	577	168	-409	-71%
43610	141	27	-114	-81%
43611	491	178	-313	-64%
43612	882	283	-599	-68%
43613	985	381	-604	-61%
43614	829	343	-486	-59%
43615	1,000	421	-579	-58%
43617	130	95	-35	-27%
43620	127	29	-98	-77%
43623	496	231	-265	-53%

Source: Trellis' calculation from data provided by Owens Community College IR Department

# Public High School Enrollment Trends

Public High School graduates and college enrollment in Toledo.

Year	High school enrollment	Graduate	College Enrollment	Percent in college	Percent in 2-year	Percent in 4-year
2015	10,808	1,649	546	34%	37%	63%
2016	10,784	1,815	503	29%	42%	58%
2017	10,723	1,774	590	34%	45%	55%
2018	10,592	1,878	523	28%	37%	63%
2019	11,180	1,971	572	29%	43%	57%
2020	11,113	2,064	464	22%	38%	62%
2021	11,205	1,941	450	23%	22%	78%
2022	12,131	N/A	N/A	N/A	N/A	N/A
2023	12,201	N/A	N/A	N/A	N/A	N/A

Total graduates might be deflated since schools with lower than 10 graduates are masked by Ohio Department of Education.

Source: Frequently Requested Data, Enrollment Data. Ohio Department of Education. High School to College Transition Reports, Ohio Department of Higher Education.

23%

of 2021 Toledo public high school graduates enrolled in college.

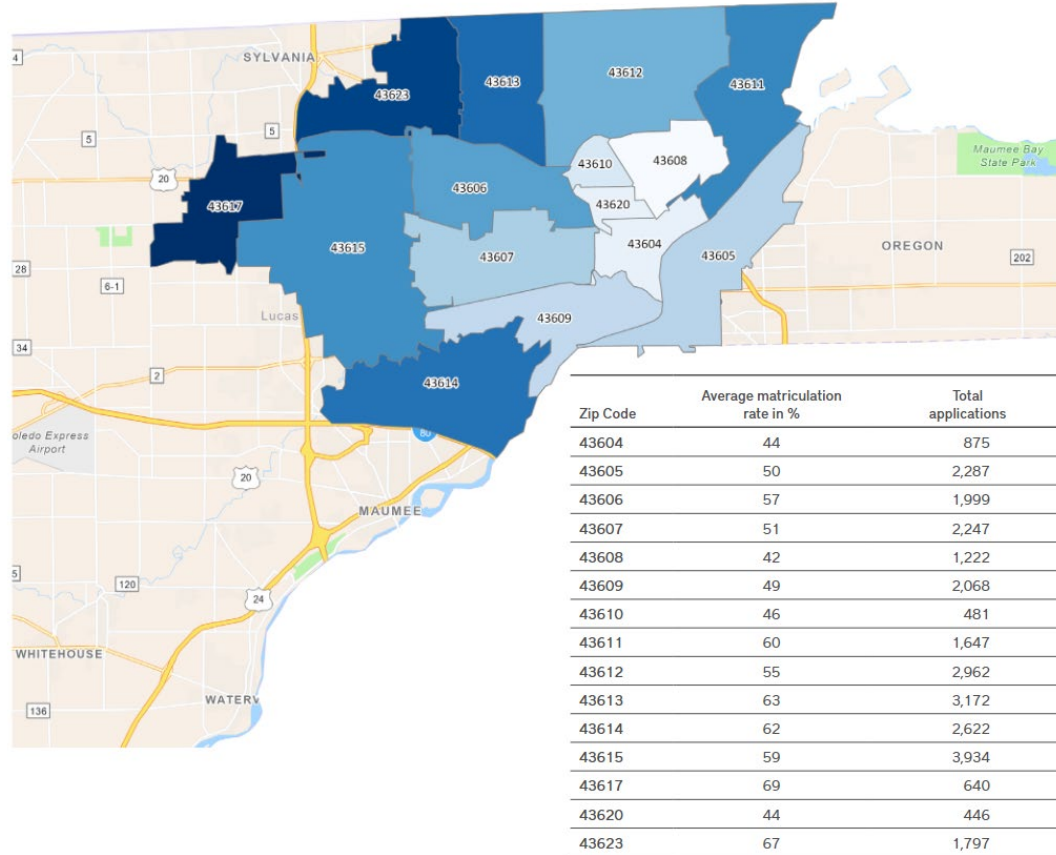
# Regional College Going Trends

Year	Ohio Percent in college	Lucas Percent in college	Top Feeder Districts Percent in college	City of Toledo Percent in college
2015	43.6%	52%	39%	34%
2016	41.6%	47%	36%	29%
2017	44.5%	56%	41%	34%
2018	43.8%	46%	36%	28%
2019	42.4%	44%	35%	29%
2020	39.1%	39%	30%	22%

Percentages of public high school graduates enrolling in school within the same year of graduation in Toledo is lower than Ohio's and Lucas County's rates

# Matriculation Rates Vary Across City

Average matriculation rate of all applicants by zip codes, Toledo 2014-2022



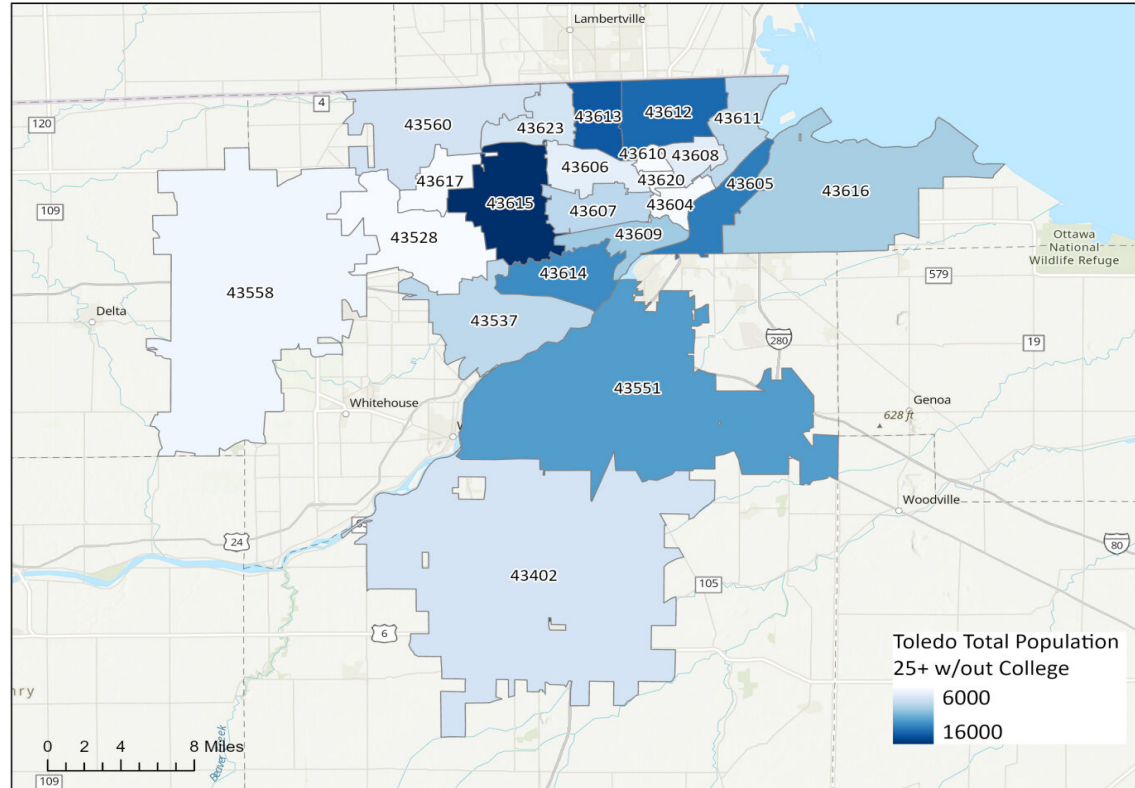
# Matriculation Rates by Income

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Zip code	Median income (in \$)	Average matriculation rate in %
43617	57,673	69
43606	42,669	57
43613	40,308	63
43623	40,132	67
43614	38,061	62
43615	36,197	59
43611	35,759	60
43612	32,461	55
43620	32,002	44
43610	30,613	46
43609	30,003	49
43607	27,897	51
43605	26,633	50
43608	22,159	42
43604	21,773	44

# Adult Learner Opportunity

Toledo Area Population 25+ w/out College Degree



# Key Stats



**80%**

live .5 miles from the closest bus stop



**23%**

of Toledo HS graduates enroll directly in college



**55%**

of Toledo residents 25+ are college ready



Direct to college enrollment is currently at

**31%**

for Owen's top feeder institutions



According to the most recent ACS survey there are

**189,980**

people aged 25 and over in key parts of Owens service area that have only high school degree or some college



Priority is to grow the educational attainment in the region by increasing the enrollment pie not through redirection of current enrollment.



# Decision Framework

# Updated Decision Framework

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As we evaluated the existing data, engaged with stakeholders, and discussed the intent of the project there were three major goals that emerged:



There is an opportunity for regional collaboration to further increase **educational attainment and competitiveness of the workforce.**



The Toledo community is ready for intentional engagement to not only support direct to college enrollment, but also to provide localized and targeted support for **modern learners.**

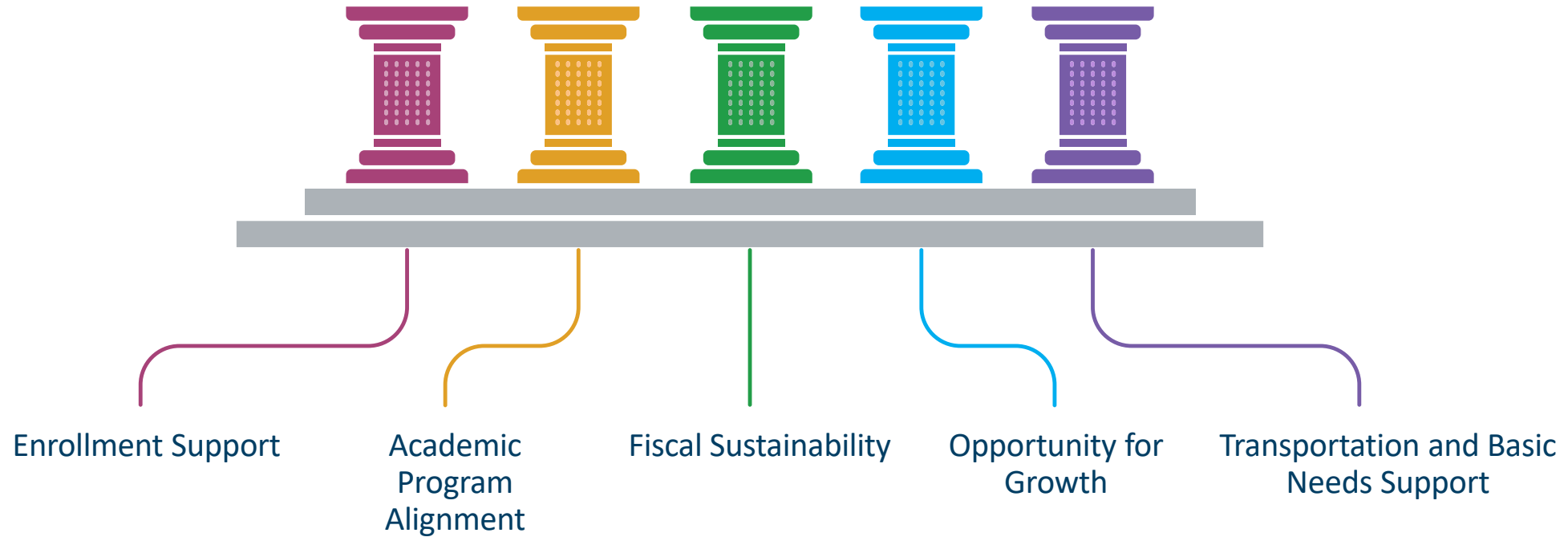


For these initiatives to be successful there must be **shared responsibility across numerous entities that can impact regional change.**

# Evaluation Pillars

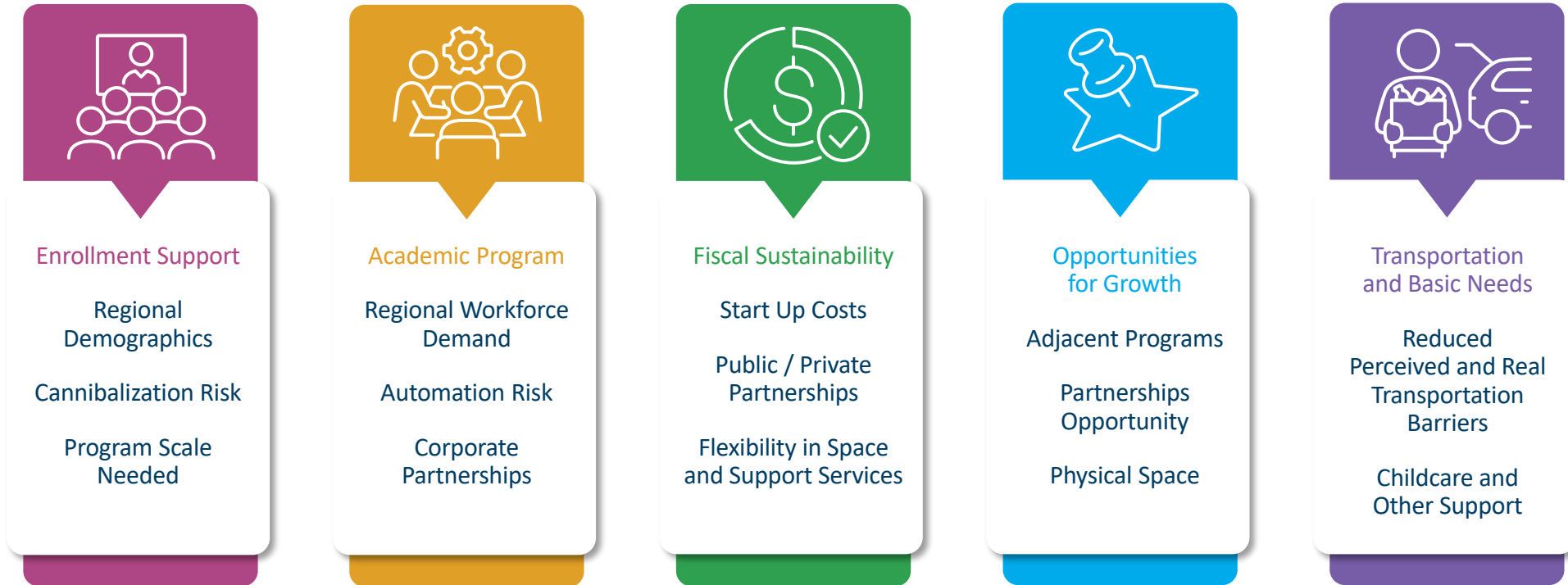
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Trellis proposes five pillars for evaluation for proposed sites.



Trellis utilizes the pillars to assist in making a decisioning framework for Owens Community College. Priority factors are included in the following slides.

# Evaluation Points



# Highlighted Considerations

## Enrollment Considerations



To support a new physical location, Owens will need to develop an enrollment pipeline. Opportunities should be evaluated to minimize the cannibalization of existing enrollment, be located in areas that have eligible students, and have partnerships to drive new students into these programs.

## Academic Program Alignment



Finding the appropriate academic program fit is essential to making sure that the site is successful. Owens should evaluate programs for workforce need, industry partnership opportunities, and alignment with existing academic offerings. Specific focus should be given to high demand roles, with a quick time to degree, and strong opportunity for scheduling flexibility.

## Fiscal Sustainability



Starting a new site can be expensive and present risk for Owens to mitigate this risk. Owens should explore ways to develop partnerships that can reduce the financial risk and seek opportunities to have a physical location that scales with the service offerings onsite. In the pilot phase, this should include limited program offerings, hybrid support services, and capital driven partnerships to decrease the costs associated with the pilot.

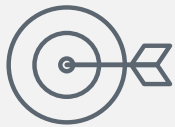
## Transportation Routes



All locations that were evaluated have areas for improvement related to transportation and student access. Owens will need to engage collaboratively with regional stakeholders to provide the best possible service to all locations. This can be assisted by intentional course scheduling at new and existing sites.

# Highlighted Considerations

## Sustainable Growth



Creation of a new physical location can be expensive and present significant risk to the institution. To mitigate this risk, Owens should begin with the implementation of specific, targeted degree programs that incur limited start up costs and have ample partnerships in place from the onset.

## Poverty and Need



For students that are considering postsecondary education the biggest barrier to enrollment and success is often poverty. As Owens implements a new physical location priority should be given to the opportunity to integrate broader community support services that can support students throughout the many facets of their life.

## Stakeholder Participation



Implementation of a new physical location is targeted at enhancing the competitiveness of the Toledo region and increasing educational attainment for all. Because of this, any initiative can not be specific to Owens Community College, but rather needs to be a regional collaborative effort. Owens will need to secure robust partnerships prior to implementation of the new site including corporate, governmental, and non-governmental non-profits.

## Social Service Support



Opportunities exist to connect Owens activities with local social service providers that are fulfilling the same mission. Trellis evaluated sites and included relevant social service providers and engaged in conversations with social service providers about mission alignment to support the modern learner.

# Recommendations

# Recommendations

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## Provide Alignment to Modern Learner Needs

Owens has a fundamental opportunity to support modern learners across the city of Toledo. This will require work to better serve individuals with complexity in their lives, changes in the value proposition of higher education, and a desire for a quicker return on investment.



## Develop Strong Community and Corporate Partnerships

Development of a new physical location will require partnership to drive success. Owens should have partnership arrangements in place prior to the final selection of a location. These partnerships will allow for a community-wide approach to enhancing the reach of Owens Community College.



## Start Small and Grow Over Time

New programs and sites take time to experience traction and enrollment growth. Because of this, and the high start-up costs of a new location, Owens is encouraged to start small with specific programs before expanding the growth of a physical location.



## Develop Transportation Pathways

None of the sites that have been evaluated provide ideal transportation pathways. Further work will be needed to engage the regional stakeholders to increase accessibility to the selected location.



# Summary of Activity

# Project Outreach

## Stakeholder Interviews



College Access and  
Success Organizations



Social Service  
Agencies



Industry and  
Educational Partners

## KEY DATA POINTS

**180,000** Applicant data points

**280,000** Enrolled student data points

**14,585** Non-matriculants that have been surveyed

*Additional public data from Ohio Department of Education and American Community Survey has been utilized*

## INPUTS



# Site Evaluation Criteria

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The evaluation criteria includes three primary focus areas:

## Transportation

- Public Transportation Access
- Bus Routes and Commute Times
- Parking Availability

## Enrollment

- Current Student Enrollment
- Applicants and Matriculation Patterns
- Degree Program of Enrollment
- College Ready Population

## Student Support and Mission

- Poverty Rate
- Social Service Providers
- Educational Partners and Services
- Educational Attainment

# Phased Timeline



# Supplemental Support

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