



THE INDISPENSABLE INSTITUTION

TAKING THE MEASURE OF COMMUNITY COLLEGE
WORKFORCE EDUCATION

TAMAR JACOBY

SEPTEMBER 2021



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ABOUT THE AUTHOR

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ABOUT THE ORGANIZATION

Opportunity America is a Washington-based nonprofit promoting economic mobility—work, skills, careers, ownership and entrepreneurship for poor and working Americans. The organization's principal activities are research, policy development, dissemination of policy ideas and working to build consensus around policy proposals.

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For a closer look at the survey findings, including state-by-state comparisons, please visit www.opportunityamericaonline.org/ccsurvey/. If you are a researcher seeking access to the full data set, please write to info@opportunityamericaonline.org.

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EXECUTIVE SUMMARY

As the Covid-19 crisis abates and the nation moves to pick up the pieces, the new economy that's emerging looks very different from the one that shut down in 2020, and it demands a different response. Resuming life after so many months of lockdown offers a once-in-a-lifetime opportunity to reboot.

Among the many momentous issues to be addressed, few loom as large as human capital development—equipping Americans with the skills they need to succeed in a rapidly changing economy.

The Covid crisis is amplifying and intensifying three long-term labor market trends. First, automation and digitization, ripping through the economy since the 1970s, have dramatically increased demand for postsecondary education and training. Second, also a product of the digital revolution, is the new premium on higher-order analytic and social skills—critical thinking, problem-solving, communication and teamwork. Still a third longer-term trend likely to become more pronounced in years ahead: growing interest in what some call “lifelong learning.”

The Covid economic shock is expected to accelerate all three of these shifts, unleashing a prolonged burst of automation and business restructuring with profound consequences for in-demand skills and lifelong learning. The bottom line for policymakers looking to rebuild for the future: they need to think

Resuming life after so many months of lockdown offers a once-in-a-lifetime opportunity to reboot.

differently—perhaps dramatically differently—about postsecondary education and job training.

There will be changes needed in many quarters to address this new reality. High schools, colleges, professional schools, government job training, employer-provided reskilling, disruptive education innovators and others all have a role to play.

But of all the assets at hand, few are as apt and versatile as the nation's more than 1,100 community and technical colleges.

Community and technical colleges educate more people each year than coding boot camps, apprenticeship programs and government job training combined—nearly 11 million students a year before the pandemic, compared to just 18,000 at boot camps and 210,000 in government training programs.

Public two-year colleges are deeply rooted in their communities. Many instructors and administrators have experience meeting the workforce needs of local employers. And recent years have

brought a burst of innovation, much of it centered on preparing learners for the workplace.

At a time of accelerating automation and shifting workforce needs, community and technical colleges are poised to come into their own as the nation's premier provider of job-focused education and training. But this won't happen by itself—without attention and support from policymakers, most importantly, at the state level.

Why a new survey?

Among the biggest challenges facing lawmakers seeking to make the most of community colleges is lack of information, particularly about the noncredit continuing education programs that exist alongside but separate from colleges' traditional degree-granting divisions.

In early 2020, Opportunity America, Lumina Foundation and Wilder Research set out to address this gap with a new national survey of community college educators, inquiring about their credit and noncredit workforce programs and relationships with employers.

All of the nation's public two-year institutions were invited to participate. More than 600 colleges answered at least one question, and 477 institutions provided more robust replies, for a 38 percent response rate.¹

Among the biggest challenges facing lawmakers seeking to make the most of community colleges is lack of information.

Our principal findings:

- More than half of the students at the community colleges that responded to the survey—54 percent—are enrolled in job-focused programs.
- Some states put more priority than others on workforce education, with the share of community college students in job-focused programs ranging from 32 percent to 93 percent.
- An estimated 3.7 million students are enrolled in noncredit programs—learners more interested in skills than academic credentials who are not included in federal education data and often invisible to policymakers.
- The noncredit division's signature strength is workforce education: 57 percent of noncredit students at the colleges that responded to the survey are enrolled in job-focused programs, most of them shorter than a semester.
- Noncredit workforce programs vary dramatically in length, but three-quarters are shorter than 150 clock hours.
- Credit and noncredit programs are moving to prepare students for industry certification assessments, and between one-quarter and one-third of noncredit workforce students earn third-party credentials of some kind.
- Most community colleges know very little about their noncredit students, and even when they collect data, they often do not report them to the state.
- Midcareer adults seeking new skills for new jobs often look to noncredit college

programs, and 75 percent of noncredit workforce students are 25 or older, compared to 44 percent of degree-seeking community college students.

- Noncredit workforce education can drive equity and economic mobility, but many noncredit divisions neglect to track students' race or ethnicity, and on campuses that collect data, noncredit workforce students are more likely to be white.
- Many educators aspire to build bridges from noncredit to credit education, but relatively few colleges provide robust opportunities for moving between divisions, and few noncredit learners—at most colleges, fewer than 20 percent—take advantage of existing opportunities.
- As a practical matter, noncredit workforce education is ineligible for federal financial aid, leaving students and employers to carry the lion's share of the burden—53 percent of the cost nationwide and more than 80 percent in some states.
- Colleges use a variety of tools to monitor the quality and labor market relevance of their noncredit workforce programs, with 92 percent looking to input from employers and 83 percent relying on regional labor market information.

More than half of community college students are enrolled in job-focused programs.

Recommendations for policy

Our survey did not ask about public policy. But our findings highlight some clear needs to be addressed by state lawmakers. Although the area that needs most urgent attention is noncredit workforce education, most of our recommendations will have ramifications for both sides of the college.

Data. Policymakers seeking to make good on the promise of noncredit workforce education need more information—better data on college enrollments and outcomes.

Do learners land jobs in their field of study? Do they earn higher wages than before they entered a college program? Do they return to college later in life for more education or training? We don't know and, in many states, can't even estimate.

Exactly what's needed will be different in every state, and change will not be easy. But virtually every state can do a better job than it is currently doing of collecting data on noncredit community college programs.

Funding tied to labor market alignment. Workforce education that isn't aligned with the local labor market is worthless—a waste of learners' time and taxpayers' money.

States allocating funding for noncredit instruction should help educators stay abreast of industry trends, and they should reward programs—credit and noncredit—that meet this test more generously than those that do not.

Among the ways states can help: by providing support and incentives for more meaningful employer engagement, more effective use of labor market information, and programs that deliver value by preparing learners for high-demand jobs and high-growth industries.

Funding geared to employment outcomes. After decades of experimentation and debate, more than 30 states disburse some or all higher

education funding based on student outcomes. But most look primarily to academic outcomes like completion and degrees. States allocating spending for noncredit programs should revamp funding formulas to take more account of employment outcomes—job placements and earnings.

Do graduates land better jobs? Do they increase their earnings as a result of their time in college? Do they hold onto jobs and move up over time? Programs that achieve these objectives should receive more funding than programs that produce poor results.

One way to move in this direction: broader use of Workforce Innovation and Opportunity Act (WIOA) metrics to assess community college workforce programs.

States should also encourage better integration between community colleges and the public workforce system—not merging them but drawing on their comparative advantages to build a better statewide network of job-focused education and training.

Building bridges between credit and non-credit education. Noncredit workforce students seeking to advance their careers should be able to return to school later in life for more education—more short stints of job training or longer programs leading to degrees. Many colleges seek to build bridges between credit and noncredit education. But it's rarely as easy as it should be to make the transition, and relatively few learners take advantage of the opportunities that exist.

What's needed from policymakers: models, metrics and incentives to help educators create pathways for learners.

Among the tools policymakers can use to help colleges build better bridges: collecting data on crossover behavior, rewarding attainment of industry certifications recognized on

Demand for workforce

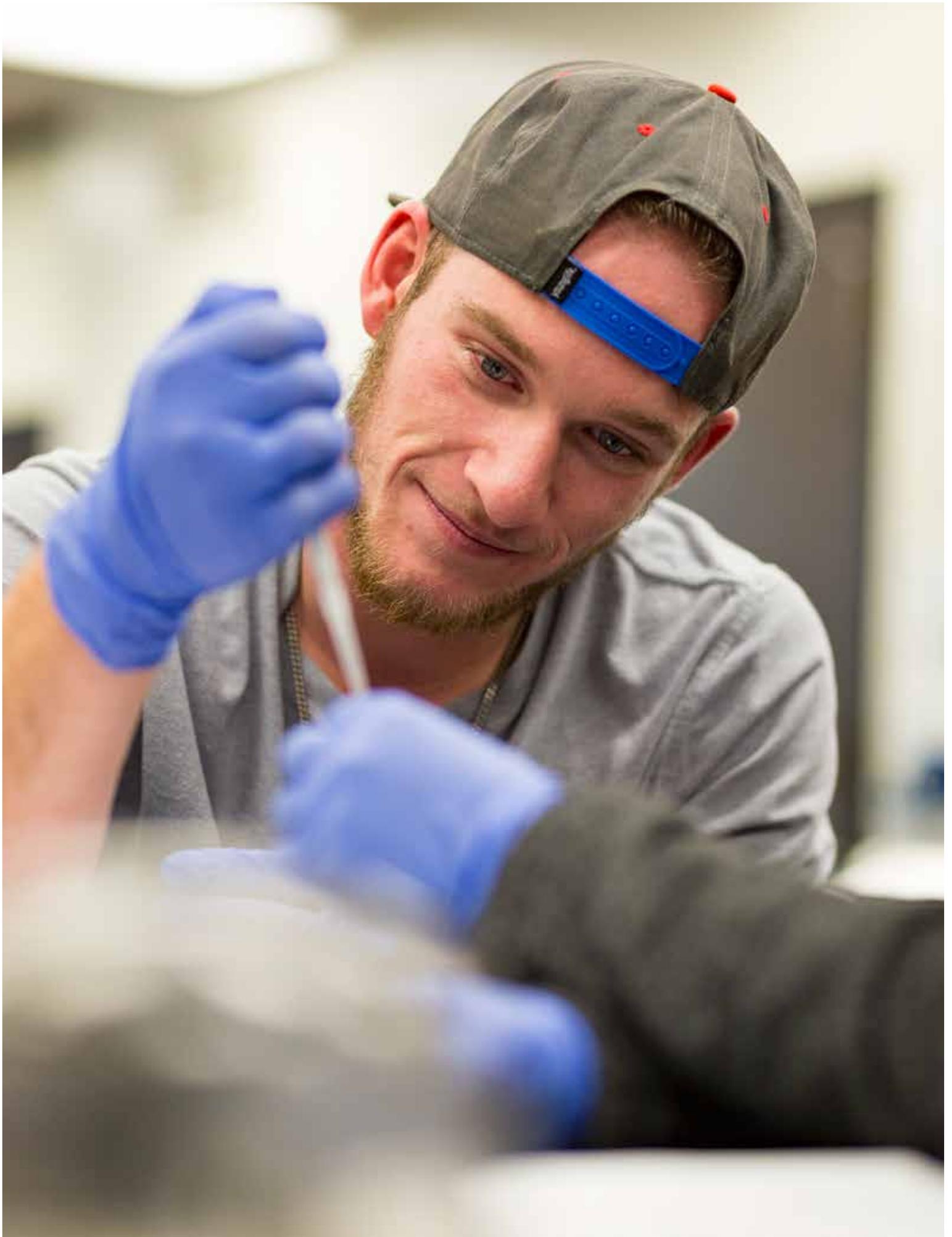
education is poised to explode in years ahead as automation and business restructuring transform the labor market.

both sides of the college, standardizing non-credit programs with a statewide common course numbering system and developing statewide articulation frameworks to guide decisions at the campus level.

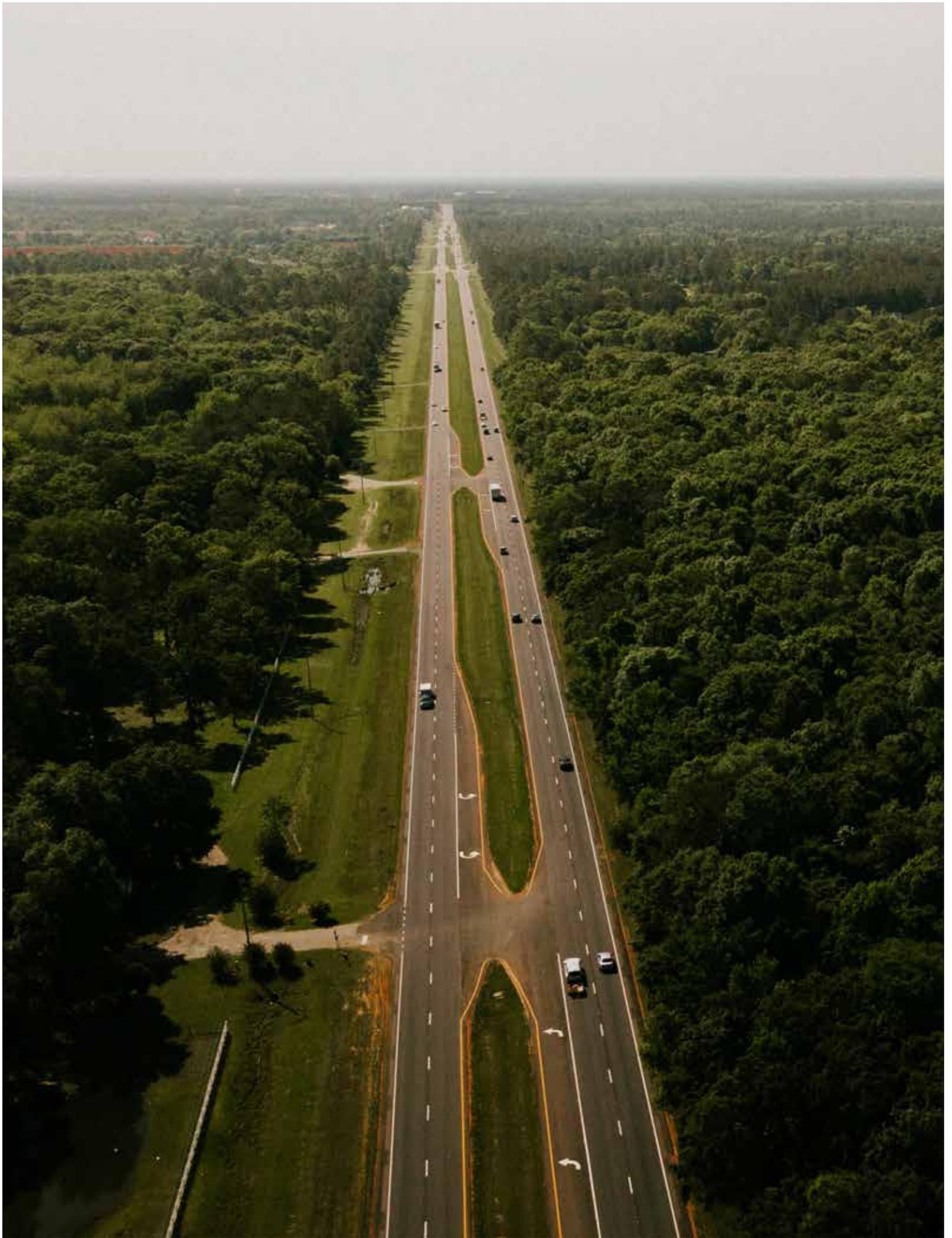
Demand for workforce education is poised to explode in years ahead as automation and business restructuring transform the labor market. Some workers who need to change jobs will make do without reskilling. Others may be lucky—their new employer will train them. But many if not most will need to reboot on their own, and many will look to their local community college—particularly, if they're in a hurry, to its noncredit workforce education division.

Public two-year institutions are poised to step up, but there is much work to be done to make community college workforce education all it can be for learners, employers and the regional economy.

The Covid economic shock was just the beginning. Even more dramatic change is on the horizon. State policymakers should start planning and building now. The future of work will not wait.



Credit: Truckee Meadows Community College



REBUILDING FOR THE FUTURE OF WORK

As the Covid-19 crisis abates and the nation moves to pick up the pieces after 18 months of unprecedented disruption, the new economy that's emerging looks very different from the one that shut down in 2020.

Millions of Americans are reconsidering their priorities. Many have moved; some will never return to their old jobs. Most significant and most disruptive is the accelerating pace of automation. What we used to call the "future of work" has arrived, and few observers expect the pace of change to slow in years ahead.

After an upheaval on this order of magnitude, there can be no going back to the old status quo. The world looks different now. It demands a different response—and resuming life after so many months of lockdown offers a once-in-a-lifetime opportunity to reboot.

In the wake of a national economic shutdown, many states expected to be cash-strapped. Instead, state and local jurisdictions are awash with unanticipated federal funding. The

Few issues loom as large as human capital development—equipping Americans with the skills they need to succeed in a rapidly changing economy.

challenge for policymakers seeking to rebuild in the wake of the pandemic: how to use this historic flow of federal funds to lay a new foundation for the future.

Among the many momentous issues to be addressed, few loom as large as human capital development—equipping Americans with the skills they need to succeed in a rapidly changing economy.

Skills wanted

In the first, confusing months of the recovery, it could be hard to distinguish between temporary bottlenecks and more challenging, longer-term labor market trends.

Low-wage jobs in the restaurant, hotel and retail industries rebounded faster than more highly skilled, better-paying positions—a stark inversion of the pattern seen in the wake of the Great Recession. Millions of Americans remained jobless even as the economy reopened in 2021. Yet companies across a broad range of industries complained about historically tight labor markets, and there were almost as many job openings as there were unemployed workers—a record 10.1 million, the highest number in more than 20 years.²

Some of these skills mismatches, particularly at the low end of the labor market, seem likely to ease in months ahead as life returns to normal and bottlenecks disappear. Other skills gaps are likely to be more enduring as the Covid crisis

amplifies and intensifies three long-term underlying trends.

First, automation and digitization, ripping through the economy since the 1970s, have dramatically increased demand for postsecondary education and training. In the 1980s, two-thirds of American jobs were open to workers with only a high school diploma or less. Today, two-thirds of American jobs require more than a high school diploma—some postsecondary education and training, although not necessarily a bachelor's degree.³

Second, also a product of the digital revolution, is a new premium on higher-order analytic and social skills. In an earlier era, relatively few jobs required critical thinking, problem-solving, communication or teamwork. Today, virtually all jobs require these skills, and they command the highest pay—often significantly more than technical or even quantitative skills. According to one study, jobs requiring the most intensive use of communication skills pay on average 20 percent more than those that require only moderately intensive use—while a similar boost in demand for mechanical skills conveys just a 7 percent increase in pay.⁴

Still a third longer-term trend likely to become more pronounced in years ahead: what some call “lifelong learning.” In the past, most workers, skilled and unskilled, had just one opportunity for postsecondary education and training—in late adolescence or early adulthood. But the growth of the knowledge economy and shrinking half-life of skills are transforming expectations and adult behavior. In one survey conducted a few years before the pandemic, 63 percent of working adults—36 percent of all American adults—told researchers they had taken a course or gotten training in the past 12 months to improve their job prospects.⁵ Nine months into the Covid crisis, 41 percent of adults told other pollsters that if they lost their job, they would need more education to replace it.⁶ And so-called “nontraditional” college students—older, attending

Nearly two-thirds of working adults had taken a course or gotten training in the past 12 months to improve their job prospects.

part-time, often financially independent—now far outnumber their younger peers on campus.⁷

The Covid economic shock is expected to accelerate all three of these shifts, unleashing a prolonged burst of automation and business restructuring with profound consequences for in-demand skills and lifelong learning.

A few data points capture the change in the past 18 months. Analysts who track job postings data say they see a sharp uptick in demand for digital skills, particularly at the high end of the labor market.⁸ One association that tracks orders for factory robots saw a 64 percent increase from late 2019 to late 2020. And this is only the beginning: according to the McKinsey Global Institute, as many as 17 million Americans may need to change jobs by 2030—one in 10 US workers and 30 percent more than anticipated before the pandemic.⁹

This quickening pace of change has consequences for workers in virtually every sector. For some, the need is immediate. Even as unemployment plummets, millions of Americans need fast, job-focused reskilling and upskilling to catch up with the way their industry changed during the pandemic. Other sectors face a more prolonged transformation: a long arc of continuous technological change all but certain to require new skills and a new approach to learning.

The nation's rising awareness of racial inequity only sharpens the imperative. Along with innovation to keep up with the changing economy, we need education and upskilling to make up for past injustices.

The bottom line for policymakers looking to rebuild for the future: they need to think differently—perhaps dramatically differently—about postsecondary education and job training.

An essential asset

There will be changes needed in many quarters to address this new reality. High schools, colleges, professional schools, government job training, employer-provided reskilling, disruptive education innovators and others all have a role to play.

But of all the assets at hand, few are as apt and versatile as the nation's more than 1,100 community and technical colleges.

It's easy for policymakers and the public to overlook community colleges. Two-year institutions live in the shadow of traditional four-year colleges and universities. Many Americans see them as "junior colleges"—a somewhat less distinguished, more affordable stepping-stone to a bachelor's degree. Two-year schools vary widely; they are highly uneven in quality. Graduation and transfer rates are stubbornly disappointing.

And even community college educators often underestimate the institution's potential. They, too, often see themselves primarily as feeders for four-year colleges, focused on the same academic mission and accountable to the same standard—degree attainment.

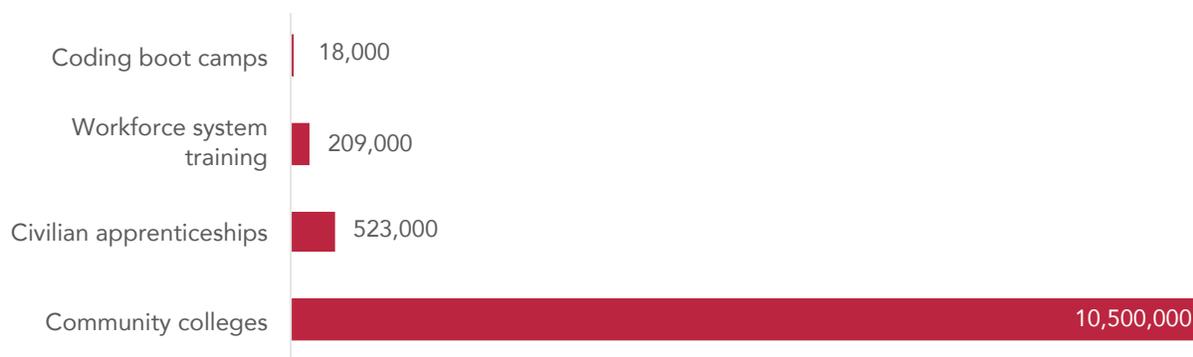
What this conventional wisdom misses: the unparalleled potential of community colleges to meet the human capital needs emerging in the wake of the pandemic. Not all public two-year colleges focus primarily on preparing learners for the workplace, but few other American institutions are as well positioned to provide the job-focused education and training the nation needs and will need increasingly in years ahead.

Community and technical colleges educate more people each year than coding boot camps, apprenticeship programs and government job training combined—nearly 11 million students a year before the pandemic, compared to just 18,000 at boot camps and 210,000 in government training programs. (See figure 1.)

Two-year colleges are deeply rooted in their communities. Many instructors and administrators have experience meeting the workforce

FIGURE 1. Only community colleges have the reach and scale to provide the upskilling the nation needs in years ahead.

Number of learners by institution, 2019



Note: All data are for 2019.

Source: Course Report, 2020 Coding Bootcamp Market Size Study; US Department of Labor, Employment and Training Administration, "PY 2019 WIOA National Performance Summary"; US Department of Labor, Employment and Training Administration, "Registered Apprenticeship National Results, FY2019"; and Opportunity America's calculation based on Opportunity America community college survey and American Association of Community Colleges, "Fast Facts 2021."

Only community colleges have the reach and scale and infrastructure to deliver the upskilling that will be needed in years ahead.

needs of local employers. Recent years have brought a burst of innovation, much of it centered on preparing learners for the workplace, and community colleges across the country are moving to put workforce education more at the center of their mission and culture.

At a time of accelerating automation and shifting workforce needs, community and technical colleges are poised to come into their own as the nation's premier provider of job-focused education and training. Only they have the reach and scale and infrastructure to deliver the upskilling that will be needed in years ahead as technological change transforms the economy.

This won't happen by itself—without attention and support from policymakers. Community colleges need help—new expectations, new standards, new funding sources and funding

mechanisms—to make the most of their potential. But with the right reinforcement, they are positioned to take off as one of the nation's most important institutions—a go-to source for lifelong learning and an indispensable engine of economic growth.

A new survey

Among the biggest challenges facing policymakers seeking to make the most of community colleges is lack of information. There is much we don't know about public two-year institutions, and much of what we think we know is misleading.

There are several reasons for this confusion. The public and policymakers alike tend to view two-year colleges through the lens of four-year institutions, missing what's unique about two-year schools and the distinctive value they add. Community colleges serve many kinds of students—recent high school graduates seeking degrees, midcareer adults looking for job training, immigrants trying to learn English and high school dropouts in need of remedial education, among others—making it difficult to track just what the institution does or measure it effectively.

What is noncredit education?

At most colleges, the noncredit division is a stand-alone unit, governed and financed separately from the rest of the institution.



Distinct

Not on a semester schedule, offers different programs than the rest of the college



Emphasis on skills

Many students are midcareer adults taking just one or two courses, more interested in learning skills than earning credentials



Agile

No need for faculty or accreditor approval, means programs can adapt flexibly to changing labor market demand

Perhaps most deceiving: we know next to nothing about the noncredit continuing education programs that exist alongside but separate from colleges' traditional degree-granting divisions. The federal government keeps no data on noncredit education. Many states track little or no information. And without federal standards, even states that collect noncredit data often rely on their own definitions and metrics, making it all but impossible to compile a national picture.

The late 1990s and early 2000s saw a handful of national surveys inquiring about community college noncredit workforce education.¹⁰ In 2009, the American Association of Community Colleges estimated that perhaps as many as 5 million students passed through noncredit programs every year. But without federal data or other evidence to confirm or refute this estimate, no one has tried to update it since 2009.

In early 2020, Opportunity America, Lumina Foundation and Wilder Research set out to address this gap with a new national survey of community college educators, inquiring about their credit and noncredit job-focused programs and relationships with employers.

The survey was designed to address three overarching questions:

- How extensive is the workforce education offered today on community college campuses?
- How extensive are the workforce programs offered by community college noncredit divisions?
- What share of colleges are adopting the innovations seen at pioneering two-year schools, including intensive employer partnerships, shorter job-focused programs and what educators call "stackable" credentials that allow noncredit students who wish to continue their education to leverage noncredit learning for college credit?

A total of 477 institutions provided robust replies, for a 38 percent response rate.

We went into the field with the survey in October 2020. All of the nation's public two-year institutions were invited to participate.¹¹ An online questionnaire—57 multiple-choice and open-ended questions—asked for detailed data about instruction and enrollments. More than 600 colleges—nearly half of those invited to participate—answered at least one question, and 477 institutions provided more robust replies, for a 38 percent response rate.

Our study is a first step—the beginning, not the end of the research that's needed to take the full measure of community college workforce education, credit and noncredit. Our goal was to provide a first, rough map of a little-known territory, preparing the way for other researchers who we hope will follow in years to come. As expected, we came away with as many questions as answers—there is much work still to be done.

But we hope our findings will begin to dispel some common misperceptions about community colleges and help guide lawmakers, state and federal, making decisions about higher education policy and funding. Community colleges are among the best weapons we have to respond to the skills mismatches sure to come with accelerating automation. The challenge for policymakers: how to unleash this potential. We hope our survey can help point the way.



MYTHS AND MISCONCEPTIONS

For many Americans, the word “college” conjures up an image of a picturesque campus quad at a selective four-year institution. Fresh-faced students just a few years out of high school attend full-time and live on campus. They study a range of academic subjects, but most programs are grounded in the liberal arts tradition, with even math and science courses focused more on the abstract than the practical. Sports are often as important as classes, and many students split their time between studying and partying.

Most community colleges are nothing like that—virtually none of the classic college attributes apply. Few community college programs are selective. Students rarely live on campus.¹² According to the American Association of Community Colleges, the overwhelming majority—nearly two-thirds—attend part-time.¹³ And they’re older. Nearly 45 percent of degree-seeking students are 25 or older, and according to our survey—one of the first national portraits of the noncredit student body—nearly three-quarters of nondegree-seeking learners fall in that age bracket.¹⁴

Still another striking difference is the sheer variety of students at most community colleges. Some, traditional college age and older, see community college as a stepping-stone to a bachelor’s degree. But many are just stopping in for a course or two to learn a skill they hope will improve their chances of promotion. Others, young and old, seek to improve basic reading,

Virtually none of the classic college attributes apply.

writing, math or computer skills, perhaps completing high school requirements or in remedial courses designed to prepare them for college. Still others are stay-at-home parents or retirees exploring a new hobby—maybe photography or French cooking. And then there are the learners who take community college classes on the job—specialized training offered in the workplace and paid for by their employers.

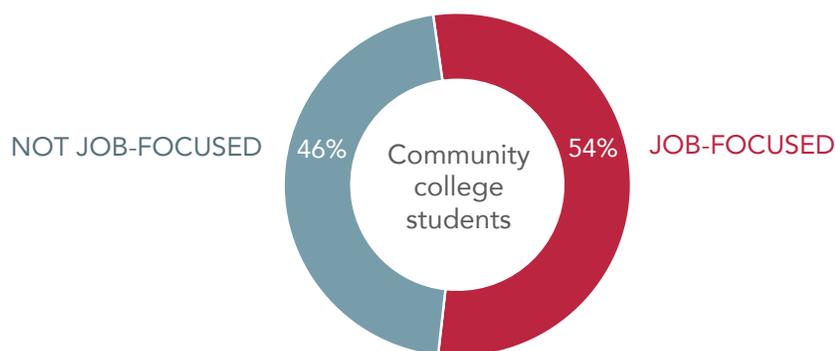
For high school seniors choosing among postsecondary institutions, this mix can be off-putting. They and their families see community college as primarily remedial or lacking in rigor, somehow not really “college”—and the stigma deters many from pursuing a convenient, low-cost path to a four-year degree.¹⁵ In fact, our survey suggests, this diversity masks an array of unique strengths.

One important way to understand the eclectic mix of community college students divides programs into two big buckets—job-focused and not job-focused.¹⁶

Among the top findings of our study and arguably the biggest difference between community colleges and four-year schools: nationally, on average, workforce education predominates at two-year institutions, with an estimated

FIGURE 2. More than half of community college students are enrolled in job-focused programs.

Community college enrollments by type of program, 2019



Note: Data include noncredit students in customized contract training. N = 455 responding colleges.

Source: Opportunity America community college survey and Opportunity America calculations based on National Student Clearinghouse Research Center, "Fall 2019 Current Term Enrollment Estimates."

54 percent of credit and noncredit community college students looking to acquire skills they expect to use in the workplace.¹⁷ (See figure 2.)

The hidden college

A second critical way to sort the mix of learners on a community college campus looks to the distinction between credit and noncredit education. What share of students are enrolled in programs that confer college credit, leading to an academic certificate or a degree? What share are more interested in skills than credentials or are in too much of a hurry for a full college education?

Some scholars call noncredit education the "hidden college"—and with good reason. There is so much we don't know about these stand-alone, unaccredited programs. And it's impossible for a survey like ours, which captures data from only a portion of public two-year colleges, to provide a full count of noncredit community college students nationwide.

What we do know: nearly two-thirds of the students at the colleges that responded to our

survey are intent on earning an academic credential. But a full 35 percent are enrolled in noncredit programs—short, no-frills, skills-focused courses that do not lead to a degree.¹⁸

If the proportions in our sample hold across all colleges, the total number of noncredit students nationwide would be nearly 3.7 million.¹⁹ That's a somewhat smaller number than the American Association of Community Colleges' 12-year-old noncredit estimate of 5 million.²⁰ But it's an estimated 3.7 million learners the federal government does not track and much of the public knows nothing about—the hidden college's invisible and often overlooked student body.

If the proportions in our sample hold, the total number of noncredit students nationwide would be nearly 3.7 million.

Noncredit workforce education

Yet a third way to understand the unusual mix of students on a community college campus combines these two perspectives—credit versus noncredit and job-focused or not. (See figure 3.)

Degree-seeking students divide roughly evenly, half occupational and half nonoccupational.

Some 47 percent are studying largely abstract, academic subjects of the kind that predominate at liberal arts colleges—often, at community colleges, the humanities or social sciences. The other 53 percent major in a practical field they hope will lead directly to a job: allied health, business, protective services, IT and engineering, among others.²¹

On the noncredit side of the college, an even larger share of students are job-focused—according to our study, 57 percent.

Nonoccupational noncredit programs—the remaining 43 percent—include remedial education, English as a second language and personal interest courses.²² (See figure 4.) But the noncredit division’s signature strength is workforce

education, and programs are uniquely well equipped to serve both career-minded students and regional employers.

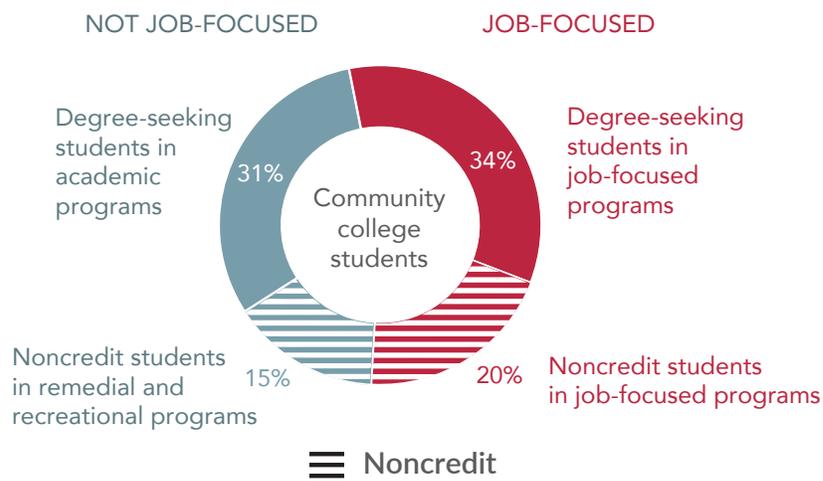
Why would a student choose noncredit workforce education over credit-eligible instruction? The credit division has many strengths, including more programs that combine practical training with broader skills like critical thinking and communication—and many learners who seek to advance on the job eventually want degrees. But other learners, traditional college age and older, find a better fit on the noncredit side of the college.

Some job-focused noncredit programs mirror those offered across campus by an academic department. Indeed, some institutions offer exactly the same course in both divisions—but the scheduling of the noncredit class is more convenient for working learners.²³

Other noncredit offerings prepare learners for an entry-level job—say, emergency medical technician—while a related course on the credit side of the college targets a higher-paying position such as paramedic.²⁴

FIGURE 3. Job-focused education predominates on both sides of the college, credit and noncredit.

Community college enrollments by type of program and college division, 2019

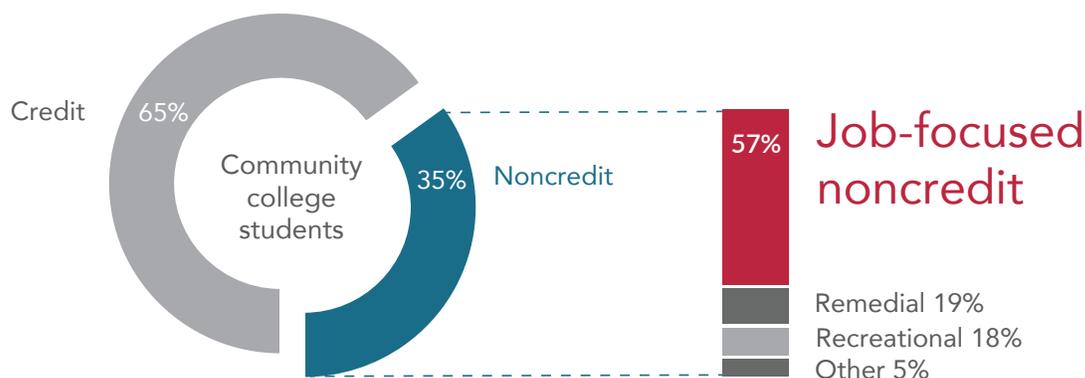


Note: Data include noncredit students in customized contract training. N = 455 responding colleges.

Source: Opportunity America community college survey and Opportunity America calculations based on National Student Clearinghouse Research Center, “Fall 2019 Current Term Enrollment Estimates.”

FIGURE 4. The noncredit division’s signature strength is workforce education.

Community college noncredit enrollments by type of program, 2019



Note: Data include noncredit students in customized contract training. N = 445 responding colleges.

Source: Opportunity America community college survey.

Still another important difference and the deciding factor for many students: the time it takes to complete programs and acquire in-demand skills. Credit-eligible programs are often broader—not just practical training, but an overview of a field—and they come with general education requirements: English, math, the natural and social sciences. The experience is designed to last at least a year or two, and it often requires more time, especially for part-time students. Most noncredit programs, in contrast, can be completed in less than a semester—a critical advantage for learners in a hurry to get a job or a better job.²⁵

Many employers looking for a training provider also gravitate naturally to the noncredit side of the college. Many employers seeking to partner with a local college start with customized contract training, provided almost exclusively on a noncredit basis. Also appealing to employers, the noncredit division has more leeway to hire instructors with industry work experience, and unlike the credit side of the college, most noncredit educators see no shame or stigma in preparing learners for the workplace.

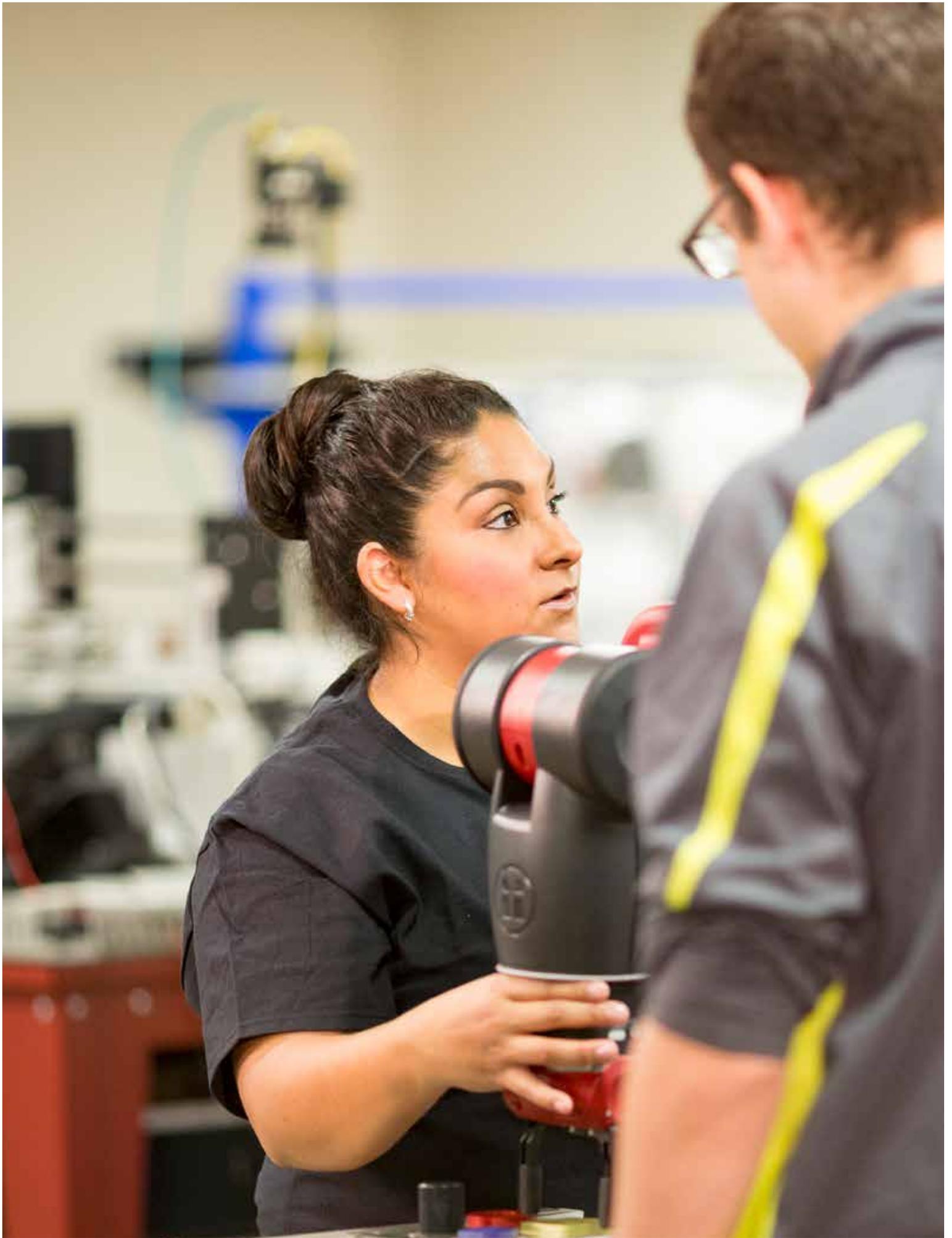
But the noncredit division’s biggest advantage—the key to its appeal for learners and local firms—is the speed and agility with which it can respond to shifting labor market demand. Administrators don’t have to answer to faculty governance committees or regional accreditors. When they see a need for job training, whether from students or employers, they can launch it immediately, standing up a new program in weeks or months—a process that can take two years on the credit side of the college. They can also adjust programs more rapidly to keep up with changing technology and shifting business needs.

Most noncredit programs can be completed in less than a semester—a critical advantage for learners in a hurry to get a job or a better job.

Few institutions in American life are as well equipped as public two-year colleges to help the nation weather the accelerating future of work. The question our survey sought to answer: how often do community colleges live up to this potential as the nation's premier provider of workforce education?

What lies beneath the national averages? How many colleges put priority on job-focused programs? How many maintain a happy equilibrium, preparing some students for careers

and others to transfer to a four-year college or university? How many noncredit divisions fulfill their promise as the agile, flexible trainers of choice for local companies and midcareer learners? Perhaps most telling, how many community colleges are adopting the pedagogical innovations pioneered in the past decade or two—new stratagems for keeping up with changing technology and providing opportunities for lifelong learning?



Credit: Truckee Meadows Community College

MAXIMIZING LABOR MARKET ALIGNMENT

Like any institution, community colleges are a tool—some would say the perfect tool to address the job training needs created by the Covid crisis and the accelerating automation it has unleashed. But like any tool, they must be used effectively.

The challenge for policymakers: how to help community colleges make the most of their potential as the nation’s premier provider of workforce education. What’s needed at the campus level is twofold. The first step is embracing the mission—job-focused programs and career success. Second and as important, if not more so, is labor market alignment—ensuring that college programs stay abreast of market trends and prepare learners for in-demand occupations.

On the first question—are colleges embracing a workforce mission?—our survey found mixed results. National averages suggest that most community colleges make a priority of preparing learners for the world of work. Individual college results tell a more nuanced story. Some institutions are focused single-mindedly on readying students for the workforce. Others devote most of their attention to preparing students to transfer to four-year institutions. Some succeed in doing both, balancing two critical and complementary missions. Still others try to be all things to all learners and end up doing nothing well.

Similarly, at the state level, our survey found dramatic differences among states. In some states—Minnesota, Pennsylvania and Utah top

Our survey found dramatic differences among states.

the list—more than two-thirds of community college students, credit and noncredit, are enrolled in job-focused programs.²⁶ In other states—including Kansas, Illinois and Montana—the share is less than one-third. (See figure 5.)

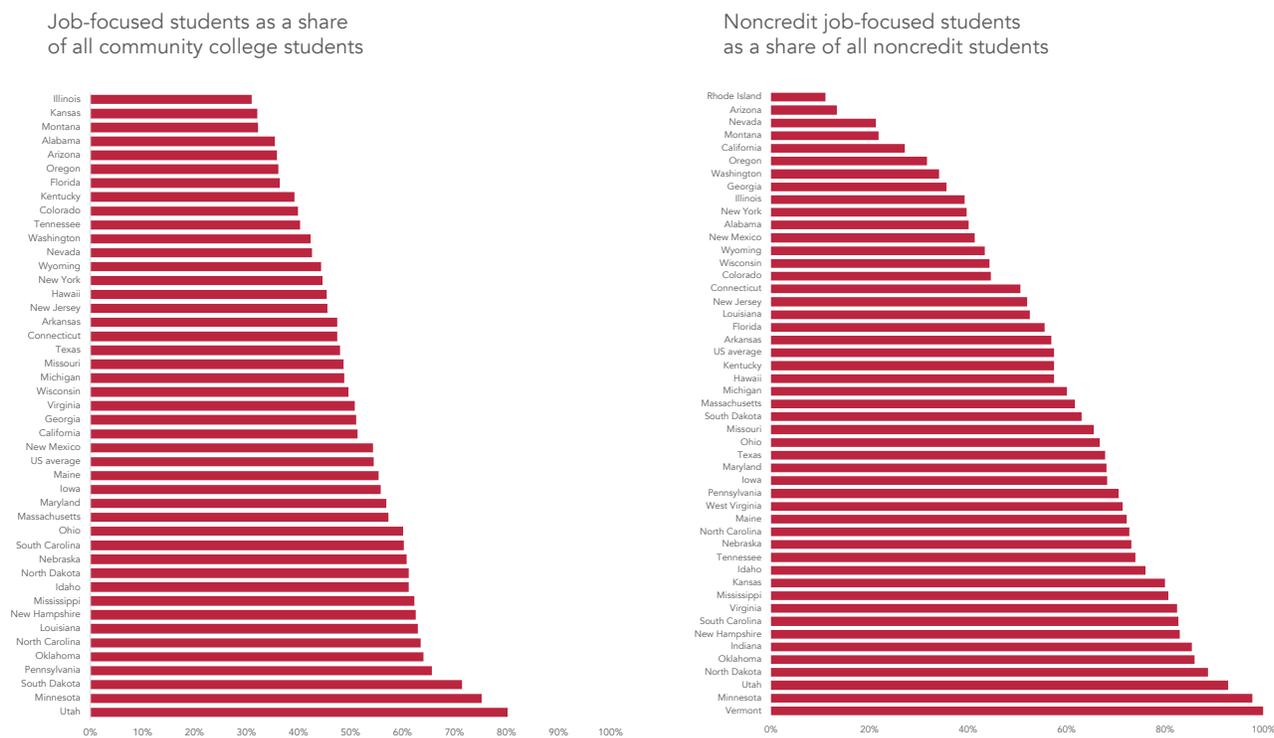
The data on noncredit education paint an even more dramatic picture—more national diversity. In nine otherwise very different states, including New Hampshire, Utah and South Carolina, more than 80 percent of noncredit students are pursuing job-focused education. In other states—Arizona and Nevada—the share is roughly 20 percent or less. (See figure 5.)

But the challenge facing community colleges does not end there. Not all workforce skills are created equal. What matters—what learners need—are skills in demand in the local labor market, valued by employers and required in real time for open jobs. Precision machining skills, no matter how advanced, have no value in a region where there is little or no manufacturing. And the coding language in demand five years ago is unlikely to command top dollar in today’s job market.

Community colleges have three primary tools to stay abreast of shifting in-demand skills:

FIGURE 5. Some states put more priority than others on community college workforce education.

Community college enrollments by type of program, college division and state, 2019



Note: Data include noncredit students in customized contract training. N = 455 responding colleges.

Source: Opportunity America community college survey and Opportunity America’s calculations using data from the National Student Clearinghouse Research Center.

employer partnerships, noncredit education and competency-based industry certifications. Our survey sought to assess how well they are using each of these tools.

Employer partnerships

There can be no effective job-focused education without employers. When the relationship works, industry partners supply information about business trends and changing labor market demand. They often collaborate with educators to design programs and develop curriculum. Most valuable, in the closest and most intensive partnerships, they commit to hiring graduates and help the college improve instruction by providing feedback on their skills.

It’s difficult to assess community colleges’ employer partnerships—for two reasons. First, relatively few institutions keep reliable data on their relationships with employers. And second, “employer engagement” is a broad, catchall term encompassing a wide range of activities, from annual advisory board meetings to intensive day-to-day collaboration on developing new curriculum or overseeing the instruction in a job-focused program.

Most of the colleges that responded to our survey said they track some information about employer engagement, but more than three-quarters conceded that it’s limited—“not collected systematically across the college.” Only 17 percent said they keep robust data, and only 19 percent appeared to have records that

would allow them to provide even a rough count of the employers they engage with annually.

Definitional issues are if anything more challenging. Many community college administrators boast about their ability to engage employers, and when asked how many partners they have, they often offer impressive estimates. The average small college—fewer than 1,000 students—reports 65 employer partners. The average number for large institutions—more than 20,000 students—is 541 relationships. But without more concrete, descriptive detail, these numbers may be misleading.

Our questionnaire attempted to dig deeper by asking responding colleges to sort their employer relationships into four broad categories: employer sponsors, employer advisers, employer partner/customers and contract training clients.

Sponsors were defined as high-profile local companies driven by a sense of corporate social responsibility that donate to the college and engage students but rarely hire out of the institution. *Advisers* engage more actively, often

through advisory committees, but rarely depend on the college as a source of talent and make no commitment to hire graduates.

Partner/customers have a pressing need for workers with the skills taught at the college. They collaborate actively to develop and deliver instruction and regularly hire graduates of the programs they partner with. *Contract training clients* pay the college for customized instruction, often offered on-site at the company and usually open only to company employees.²⁷

Given the lack of data collected by most colleges, it was hard to know just how much credence to give educators' answers about this taxonomy, and it wouldn't be surprising if some reports were inflated.

Yet nationwide, our findings suggest relatively robust employer engagement. Colleges reported that on average one-quarter of their employer partners offered customized contract training—usually a fairly intensive collaboration, albeit on upskilling open only to incumbent workers chosen by the sponsoring firm.

FOUR KINDS OF EMPLOYER PARTNERS

	<p>Employer sponsor. First River Valley Bank is a large, high-profile local employer with a strong sense of corporate social responsibility. It donates generously to the local community college and engages with students—with job shadowing, guest lectures and mentoring—but rarely if ever hires workers with less than a four-year college degree.</p>
	<p>Employer adviser. Acme Automotive is a small local employer that hires one or two technicians a year. The owner sits on a committee that advises the college about industry trends. But he has limited time for this activity—the committee meets just once a year—and he makes no commitment to hire the college's automotive graduates.</p>
	<p>Employer partner/customer. Tip-Top Machining is a medium-sized regional company with four local facilities and a pressing need for workers with the metalworking skills taught at the college. Company personnel collaborate actively with college instructors to develop and deliver instruction, and the firm commits to interviewing students who complete the two programs that the company helps direct.</p>
	<p>Contract training client. ABC Insurance is the local affiliate of a national corporation that contracts with the college to offer in-house training for middle managers—short programs, customized for the company, in Six Sigma, leadership and data solutions. Classes are offered on-site at the company and open only to company employees.</p>

THE INDISPENSABLE INSTITUTION

Asked about collaborating with employers to offer programs open to students enrolled at the college, educators reported that on average 14 percent of the employers they worked with were sponsors, 46 percent engaged as advisers and as many as 37 percent were full-fledged partner/customers. (See figure 6.)

A follow-on question asked colleges to describe a typical example of each type of non-contractual employer partner—sponsor, adviser and partner/customer—and by and large their answers confirmed our taxonomy, painting an intriguing if incomplete picture of a diverse array of company-college relationships.

Roughly half of the adviser companies described were small firms, compared to just 15 to 20 percent in both other categories. The employer sponsors and advisers were most likely to engage with the college once a year or once a semester, while 60 percent of partner/customers engaged weekly or monthly, if not more often.

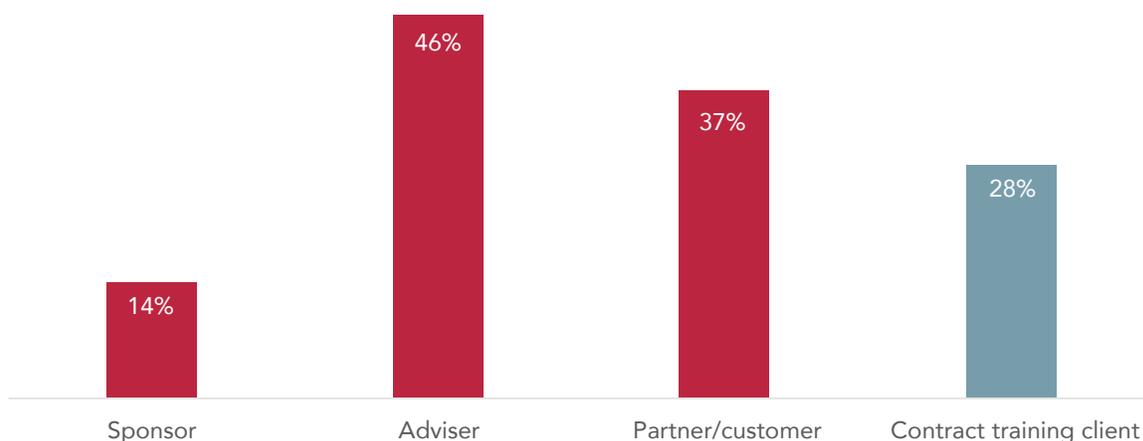
The advisers singled out for description typically touched the largest number of students, albeit indirectly—the committees they serve on often inform many programs—but they hired only about 10 percent of them. Sponsors hired a significantly larger share—close to one-third.

Perhaps the most telling question we asked colleges about their industry partnerships focused on work-based learning—internships, apprenticeships, cooperative education and other on-the-job experience. These activities vary widely in intensity: a two-year apprenticeship comes with very different obligations than a two-week internship. But any commitment to take students into the workplace is a significant undertaking for an employer and, we judged, a likely indicator of a reasonably committed relationship.

Encouragingly, nationwide, colleges report that on average 36 percent of their employer partners provide some kind of on-the-job work

FIGURE 6. Employer partnerships come in all shapes and sizes, some more intensive than others.

Community college employer engagement by type of relationship, 2019



Note: One question in the survey asked colleges, "Of all the employers that engaged with your institution in fiscal year 2019, please estimate what proportion" were sponsors, advisers or partner/customers—and most colleges' answers summed to 100 percent. A separate survey question asked, "Approximately how many employers that engaged with your institution in fiscal year 2019 provided customized contract training?" Some colleges may have counted some employers twice, and there may be some overlap in the data reported on partner/customers and contract training clients. N = 445 and 424 responding colleges.

Source: Opportunity America community college survey.

experience, and in some states, nearly two-thirds offer work-based learning opportunities.

Noncredit education

A second essential tool for maximizing any community college’s labor market alignment is the noncredit continuing education division—a unit ideally positioned to connect instructors and administrators with the local labor market.

As a rule, noncredit instructors are better acquainted with local employers than their peers on the credit side of the college. The inherent flexibility of the noncredit division—no need for cumbersome, time-consuming program approval—positions it to respond more quickly and nimbly to changing technology and industry trends. And in the best of circumstances, when relationships among divisions work as they should, noncredit educators share their knowledge and business contacts with colleagues on

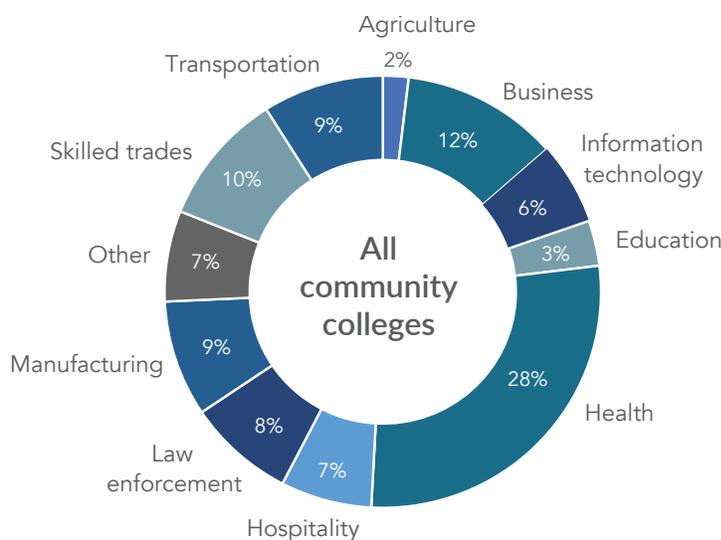
the credit side of the college, helping the whole institution stay abreast of changing labor market demand.

How many colleges make the most of their noncredit divisions in this way? Our study looked at three telling indicators: noncredit fields of study, noncredit program length and the intensity of noncredit employer engagement.

Field of study. Noncredit divisions vary widely in the programs they offer, with some fields of study far more robust and popular than others. Nationwide, health care predominates by a large margin. Some 30 percent of noncredit workforce students are enrolled in programs designed to prepare them for health care jobs, with most of the next biggest concentrations—in programs targeting business, manufacturing, transportation and the skilled trades—each logging in at close to 10 percent. (See figure 7.)

FIGURE 7. Noncredit fields of study vary widely from college to college and state to state—and should align with local labor market demand.

Community college noncredit enrollments by field of study, 2019



Note: N = 354 responding colleges.

Source: Opportunity America community college survey.

But these national aggregates mask dramatic state variation. Health care, for example, accounts for less than 10 percent of enrollments in some states and well over half in other places.

The critical question for educators: does the mix of programs they offer match labor market demand in their region?

In some cases, it does. Consider the states with the largest share of noncredit programs in manufacturing: Arkansas, Indiana, Kansas, Mississippi and Ohio. All five also rank among the top manufacturing states nationwide—those where manufacturing makes up the largest share of total employment.²⁸

Other states use their noncredit workforce programs even more strategically. In Oklahoma, for example, where the aerospace and defense industries touch roughly one-quarter of all jobs, 22 percent of noncredit workforce students study aerospace and aviation.²⁹

What we don't know: is this match of workforce fields and local demand the exception or the rule? More research is needed. But educators in every state should be working to advance this kind of alignment—and policymakers should find ways to encourage and incentivize it.

Program duration. Unlike on the credit side of the college, where virtually all courses are the same length—a 15-week semester—noncredit instructors can vary the duration of the programs

Under current law, only students enrolled in noncredit programs longer than 600 hours are eligible for federal financial aid.

they offer. Less complex skills require less training, allowing for shorter programs. And in theory, market discipline, whether from students in a hurry to get jobs or employers ramping up to meet customer demand, should keep programs just the right length—no longer than it takes to acquire essential skills.

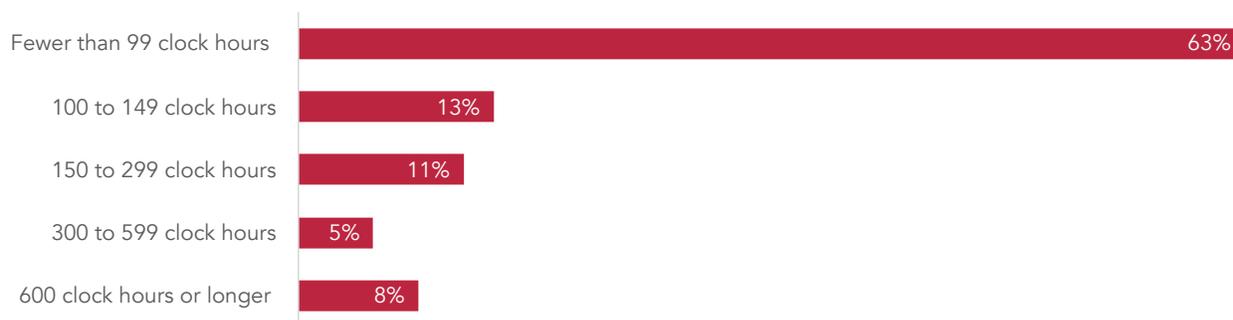
In fact, our survey found dramatic variation across noncredit workforce programs, with nearly two-thirds—63 percent—measuring fewer than 100 clock hours and just 8 percent requiring more than 600 hours of instruction. (See figure 8.)

This could be a good sign—evidence of encouraging labor market alignment. But it's also of some concern.

Under current law, only students enrolled in noncredit programs longer than 600 hours are eligible for federal financial aid. And a popular reform proposal to lower that threshold—the

FIGURE 8. Noncredit workforce programs vary dramatically in length.

Community college noncredit workforce programs by length, 2019



Note: N = 338 responding colleges.

Source: Opportunity America community college survey.

Jumpstart Our Businesses by Supporting Students (JOBS) Act—would provide only for programs longer than 150 hours, leaving out a full 76 percent of noncredit workforce course offerings.³⁰

Noncredit employer partnerships. Telling indicator number three—among the best measures of any program’s labor market alignment—is the depth and intensity of the college’s employer partnerships.

Is the conventional wisdom true—do noncredit instructors and administrators have closer, more intensive ties to employers than their peers on the credit side of the college? And do they use these relationships shrewdly to ensure that students are learning skills with value in the local labor market? Our data suggest that they may.

Asked what means they use to ensure the quality and labor market relevance of their noncredit workforce programs, the administrators who responded to our survey ranked input from local employers as their number-one tool—a full 92 percent say they design and revise programs on the basis of industry input. We have no way of knowing what share of programs at each institution are designed with industry input. But in the overwhelming majority of states, 100 percent of responding colleges reported that their

noncredit division looked to employers when designing or revising programs.

Also telling, when asked to describe an example of each type of employer that engages with the college—employers as sponsors, advisers and partner/customers—administrators reported that employer sponsors and advisers maintain relationships across the institution. But employer partner/customers appear to prefer the noncredit division. (See figure 9.)

None of our data are conclusive—far from it—and there is much work still to be done. The best measure of labor market alignment—ultimately, the only measure that counts—is student employment outcomes. Do graduates get well-paying jobs in their field of study?

But policymakers seeking to help noncredit educators stay abreast of industry trends can start by supporting efforts in two areas flagged by the survey: employer engagement and program-by-program alignment with local labor needs.

Lawmakers can ensure that colleges have access to the data they need to align course offerings with local labor demand—sophisticated labor market information is expensive and often beyond the reach of a noncredit division. In some states, a state agency helps educators engage with employers, convening industry

FIGURE 9. The college’s most intensive employer partnerships run through the noncredit division.

Community college employer partnerships by type of relationship and college division, 2019

Type of collaboration	Engage primarily with credit programs	Engage primarily with noncredit programs, or credit and noncredit
Sponsors	48%	53%
Advisers	48%	52%
Partner/customers	37%	62%

Note: Partner/customers may include contract training clients. N = 445 responding colleges.

Source: Opportunity America community college survey.

Many educators have no experience with the kind of committed partnership that often produces the best results for students.

groups or creating forums for companies and colleges to sit down together.

Still another issue that needs attention: many educators who rely primarily on occasional employer advice have no experience with the kind of committed partnership that often produces the best results for students. Policymakers can help by highlighting examples of more engaged collaboration or working to scale it across the state.

The challenge for lawmakers: to identify what works best for educators seeking to keep up with the changing labor market and create incentives for colleges to implement these reforms. The noncredit workforce education division is among the college’s most potent tools, but all too often overlooked and underused.

Industry certifications

A third essential tool for community colleges eager to stay abreast of the rapidly changing labor market is industry certifications—credentials conferred by employer groups that indicate whether students have the skills they need to succeed on the job.

Unlike traditional academic credentials, which signal that students have attended and completed a course of study, industry certifications signal what learners know and what job-related tasks they can perform—occupation-specific knowledge and skills measured by tests developed by employers.

How it works: industry groups canvass employers in their sector to determine the skills required for a given occupation and develop a standardized test to assess those skills. College programs structure curriculum around what students need to know to pass the industry assessment. Tests are administered by the industry group, usually at a location other than the college. Some instructors leave it to learners to decide if and when they sit for the exam. Others mandate that students take the test—it’s required to complete the course.

What industry certifications promise students: a better bridge between what they learn in class and the skills they need to succeed on the job.

FIGURE 10. Credit and noncredit programs are moving to prepare students for industry certification assessments.

Preparation for industry certification assessments by college division, 2019

Division	More than one-third of programs prepare learners to sit for a test	More than one-third of programs require learners to sit for a test
Credit	29%	13%
Noncredit	32%	27%

Note: N = 446, 446, 434 and 432 responding colleges.

Source: Opportunity America community college survey.

Instead of traditional academic subjects that may or may not be relevant in the workplace, learners study topics and sharpen skills specified by potential employers.

The promise to educators: programs that prepare students for certification assessments are more likely than other education and training to be aligned with labor market demand. A well-developed certification widely used in the industry it serves is a proxy for employability, and college programs that prepare students to earn that award can be confident they are preparing learners with the skills they need in the workplace.

What share of credit and noncredit college programs prepare students for certification assessments? Our survey found widespread experimentation, if not yet robust uptake.

Our findings suggest that the most telling threshold for both the credit and noncredit division is one-third of programs: do more than one-third of the programs at the college prepare learners to sit for certification tests? Some 29 percent of the colleges in our sample said their credit programs met this threshold. For noncredit programs, the figure was 32 percent. (See figure 10.)

Where the two divisions diverge: noncredit instructors were twice as likely as their colleagues on the credit side—27 percent versus

13 percent—to *require* that students sit for an assessment.

Looking just at the noncredit side and at learners rather than programs, the colleges in our sample report that on average 25 percent of workforce students earn industry certifications, and another 11 percent—perhaps overlapping, perhaps not—earn some other type of third-party credential such as a government certification or licensure. (See figure 11.)

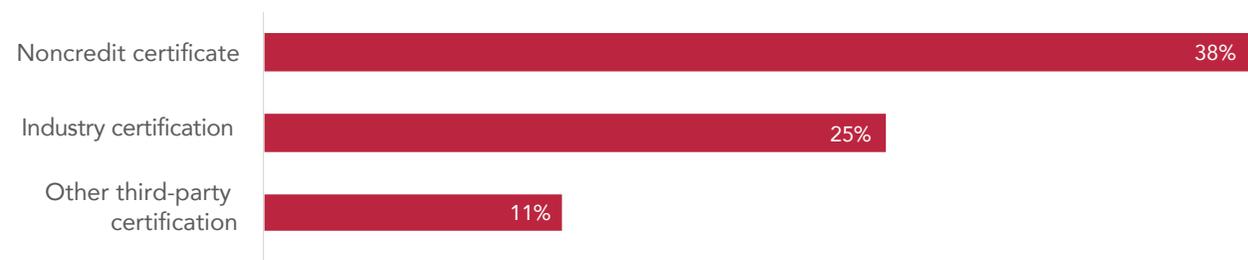
The challenge for public policy: how to encourage and incentivize colleges to make better use of all these tools—employer engagement, noncredit workforce programs and industry certifications.

Practice varies widely from college to college and state to state; educators have much to learn from their peers at other institutions. And policymakers can help by providing information and advice—state lists of certifications valued by employers, for example, or more detailed taxonomies of employer collaboration that colleges can use to assess their relationships.

But ultimately the best leverage is likely to be tangible incentives: developing performance metrics, holding colleges accountable and rewarding institutions that succeed in keeping abreast of the local labor market.

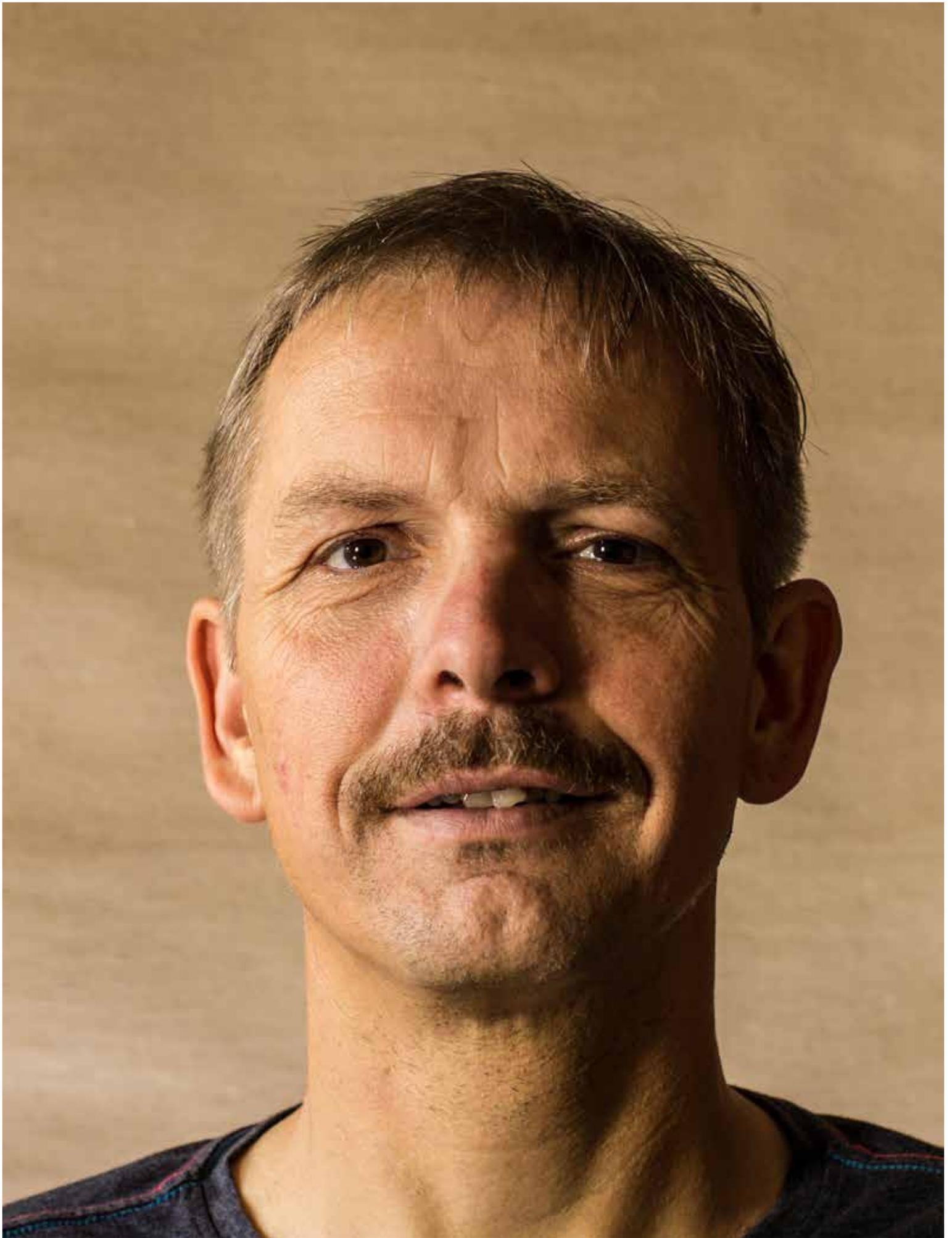
FIGURE 11. A growing share of noncredit workforce students earn competency-based credentials signaling they have the skills to succeed in a job.

Credential attainment by community college noncredit workforce students, 2019



Note: N = 351, 353 and 357 responding colleges.

Source: Opportunity America community college survey.



Credit: Olaf Mündelein

MAKING CONNECTIONS WORK FOR STUDENTS

There's no such thing as a typical community college student. But one important common thread runs through their diverse experiences and expectations. Whether learners are traditional college age or older, credit or noncredit, focused on academics or workforce skills, their time at a community college is likely to be just one stop in a lifetime of encounters with postsecondary education and training.

Many academically oriented students will go on to a four-year college or university. Many job-focused students will head directly to the labor market but then, after a few years on the job, decide to return to college for more education and training. Still other learners arrive at community college with extensive prior learning—skills picked up on the job, perhaps, or in the military—that they hope to leverage for college credit.

The challenge for educators and policymakers: how to ensure that these connections work—that programs align, transitions go smoothly and no student has to repeat courses or relearn skills they mastered in the past in another setting. This has always been important, but it's more imperative than ever today as accelerating automation amplifies the need for lifelong learning—repeated reskilling and upskilling to keep up with a changing economy.

Our survey sought to shed light on this challenge by exploring two sets of questions. First, just who are job-focused noncredit students? What do we know about their age, race and

Accelerating automation amplifies the need for lifelong learning—repeated reskilling and upskilling to keep up with a changing economy.

course-taking patterns? Second, to what extent are colleges facilitating connections between educational experiences, particularly between credit and noncredit education?

Our survey hardly scratches the surface. More research is needed—much more. But our findings paint an intriguing picture of a previously all but invisible noncredit student body and of college efforts, most still fairly limited, to build bridges between credit and noncredit instruction.

Who are noncredit students?

Most community colleges know very little about the noncredit students who pass through their doors. As one educator told us bluntly in an interview, “The only thing we know about them is whether or not they paid by credit card.”

Many colleges know a little more than this, but not always a great deal more.

Virtually all community and technical colleges keep head counts of nondegree-seeking learners. But unlike on the credit side, where administrators at every college are required to report demographic data—age, gender, race or ethnicity—for all students, only 75 percent of two-year institutions track this information for any noncredit learners. And those that ask for personal information are more likely to record age and gender than race. Nationwide, the colleges that responded to our survey checked “race unknown” for an average 44 percent of noncredit students.

Still less is known about learners’ employment outcomes: only 29 percent of schools follow graduates into the workplace, keeping count of job placements or wages. (See figure 12.)

Scanty as these data are, policymakers collect even less and know considerably less about nondegree-seeking students. Only about half to two-thirds of the information colleges track is reported to state authorities, and the

These gaps in knowledge should be a wake-up call for policymakers.

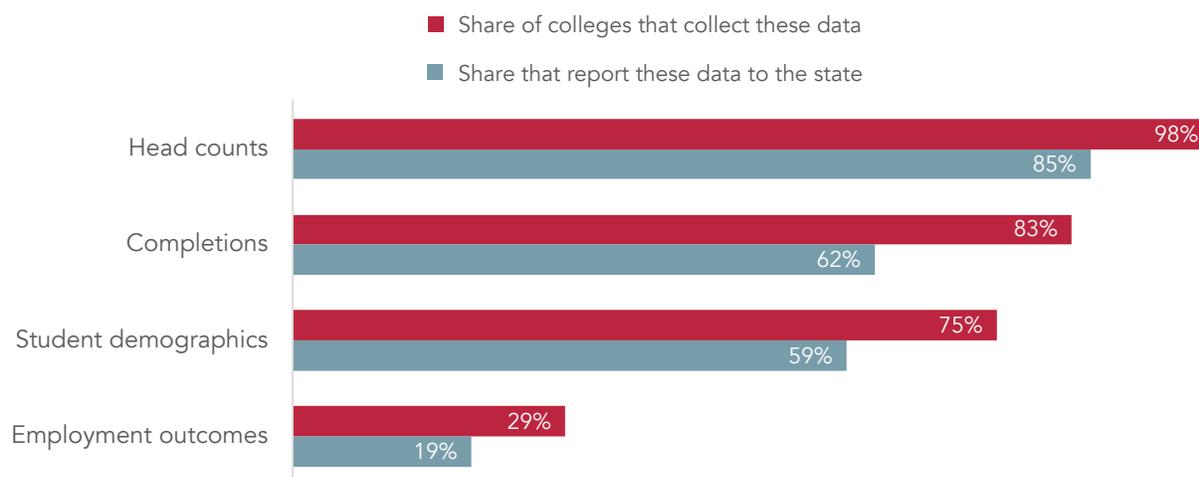
US Department of Education’s Integrated Post-secondary Education Data System (IPEDS) collects no data on noncredit learners.

These gaps in knowledge should be a wake-up call for policymakers. That we know virtually nothing about an estimated 3.7 million students enrolled in taxpayer-funded institutions accountable to state and local government would be cause for concern no matter what was being taught at the college. But it’s even more perplexing in the case of job-focused noncredit programs—some of the best, most agile workforce training available flying under the radar and unknown to state authorities.

Our survey was limited to the data colleges collect—they couldn’t report what they don’t

FIGURE 12. Colleges know relatively little about noncredit workforce students, and states know even less.

Data on noncredit workforce students collected by the institution and reported to the state, 2019

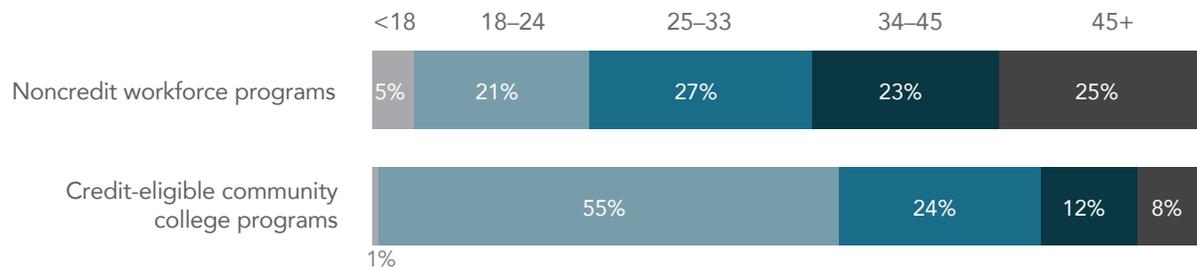


Note: N = 441, 430, 436, 425, 439, 428, 428 and 421 reporting colleges.

Source: Opportunity America community college survey.

FIGURE 13. Noncredit workforce students are older.

Age of community college students by college division, 2015–16 and 2019



Note: For noncredit workforce students, N = 259 responding colleges.

Source: Opportunity America community college survey and Opportunity America’s calculations using US Department of Education National Postsecondary Student Aid Study, 2015–16, accessed via PowerStats.

know. But it offers a first, rough sketch of non-credit workforce students nationwide—a tool for educators and policymakers seeking to create better paths for lifelong learners.

Age. Noncredit workforce students are considerably older than most of the other undergraduates on a community college campus. A full 74 percent of those whose age is known are 25 or older, compared to 44 percent of degree-seeking community college students.

Many are workers in their late 20s and early 30s who have spent a decade in the workplace but are now finally focused on a career or a family-sustaining wage. Others are older still: 25 percent of noncredit workforce students are 45 or older. (See figure 13.)

Yet many community colleges treat older students as an afterthought. Most classes are scheduled on weekdays, usually in the late morning or early afternoon—the least convenient time of day for most working adults. Teaching, counseling, student services, even marketing tend to be geared to traditional college-age students—and all of this adds up to make many older learners feel out of place on a college campus.

What’s often forgotten: most adult learners are in even more of a hurry than their college-age peers to get what they need from

college and return to the workplace. They need short-form, applied courses and contextualized remedial education—help polishing their often rusty reading, writing and math skills packaged in a single course with the technical content they need to advance on the job.

What’s needed from policymakers: incentives, performance metrics, funding to encourage innovation, perhaps even city- or statewide marketing campaigns. Colleges that don’t track students’ ages are unlikely to know how to help them. And states where midcareer adults hesitate to return to school because they don’t feel welcome on campus will lose out to other states where workers keep up with changing technology.

Race. In some states, noncredit workforce education drives equity and economic mobility, but nationwide, noncredit workforce students are more likely to be white. At the colleges in our sample, 60 percent of the job-focused noncredit learners whose race is known are white, compared to 50 percent of degree-seeking students.

Data are limited; only 48 percent of responding colleges could provide information on non-credit workforce students’ race or ethnicity. But black students appear to make up an equal share of learners—15 percent—on both sides of

Equal access to workforce education is no less important than academic equity.

the college. Hispanic students seem more likely to gravitate to credit-bearing programs: they account for 24 percent of degree-seeking students but just 17 percent of those enrolled in noncredit workforce programs. (See figure 14.)

Some educators will be encouraged by these numbers, heartened that more people of color appear to be pursuing academic degrees. Others will feel it’s an opportunity lost. Despite decades of effort to boost college-going, nearly two-thirds of Americans still lack bachelor’s degrees. Fewer and fewer good jobs are available for workers with only a high school diploma or less, and equal access to workforce education is no less important than academic equity.

The challenge for policymakers: how to encourage more equal access and awareness of the opportunities available at community college. What’s needed starts with data collection—data disaggregated by race and ethnicity. Also essential: better information, more widely disseminated, about the payoff to both academic and job-focused education.

Crossover between credit and noncredit education

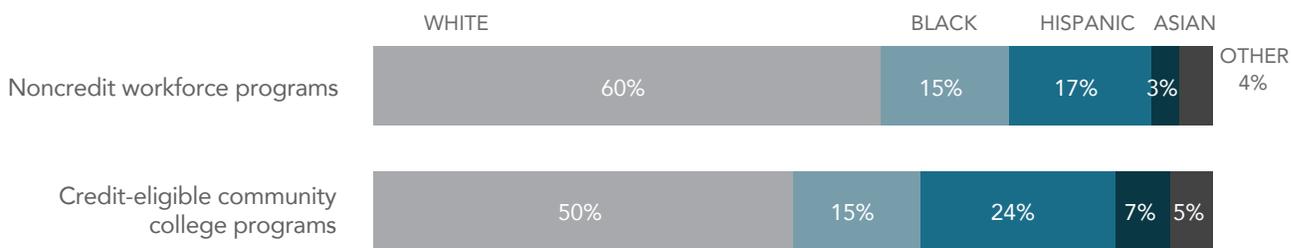
Many job-focused learners start their postsecondary education with short, noncredit courses—just the skills they need to get a job or a better job. Many then head directly to the labor market, and some never come back for more education. But those who seek to advance on the job often return to school later in life—whether for another short stint of job-focused training or a longer program leading to a degree.

What these learners need from a community college starts with a short, applied course that leads to a credential of value in the labor market, perhaps an industry certification or licensure. But then, if they return to college in the years ahead, they should be able to leverage that first credential—and any skills they learned on the job—for college credit.

This is important for many reasons, starting with employer preferences for more credentialed employees and the lifelong salary premium that accrues to a bachelor’s degree. Perhaps even more critical in the long run: traditional academic courses are often better equipped than job-focused programs to teach the higher-order analytic and social skills in growing demand in the workplace—critical thinking, problem-solving and communication.

FIGURE 14. Noncredit workforce students are more likely to be white.

Race and ethnicity of community college students by college division, 2015–16 and 2019

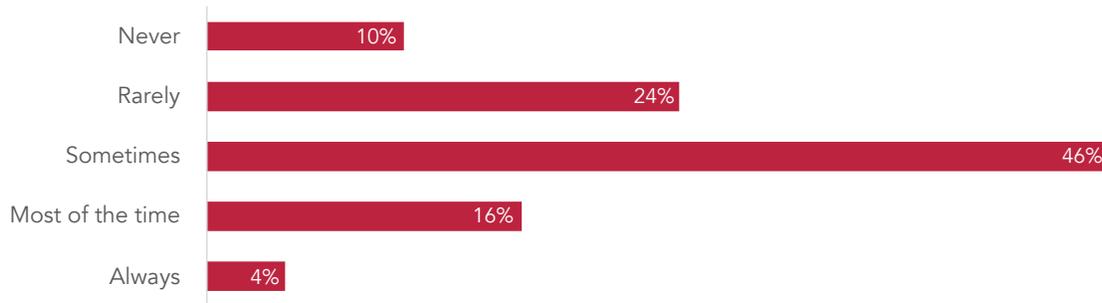


Note: For noncredit workforce students, N = 230 responding colleges.

Source: Opportunity America community college survey and Opportunity America’s calculations using US Department of Education National Postsecondary Student Aid Study, 2015–16, accessed via PowerStats.

FIGURE 15. Many noncredit workforce students who return to college later in life cannot leverage their prior learning for college credit.

Share of colleges where noncredit workforce students can leverage ‘most’ or ‘all’ prior learning for college credit, 2019



Note: N = 348 responding colleges. Source: Opportunity America community college survey.

Many educators aspire to build bridges for learners seeking to move from noncredit to credit education—to the point that the term “stackable credential” is an all but ubiquitous buzzword among community college faculty and administrators. The problem: according to our survey, relatively few colleges provide significant opportunities for bridging from noncredit to credit education, and few learners take advantage of the opportunities that exist.

Asked if noncredit workforce students who later enroll in a credit-eligible program can leverage most or all of their prior learning for college credit, only 20 percent of colleges said this is true “always” or “most of the time.” Another

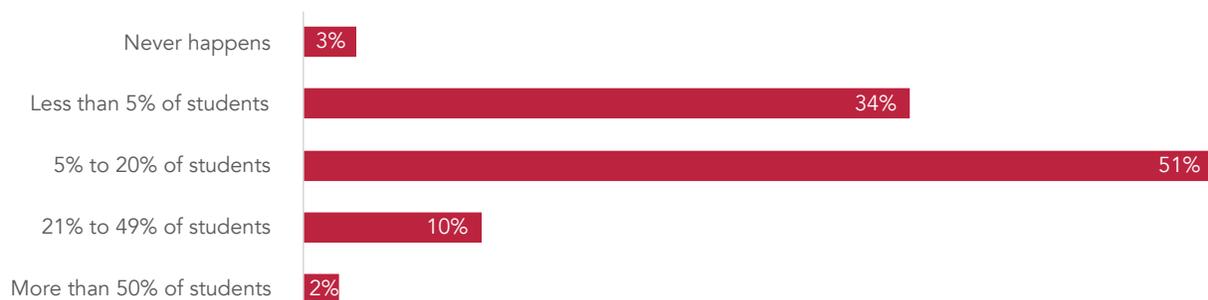
46 percent said it’s true “sometimes,” but this likely means different things at different colleges, not always encouraging. (See figure 15.)

Answers to a related question about student behavior underscored the point. However accommodating the college may be in accepting noncredit learning for college credit, relatively few students seem to be taking advantage of the opportunity.

Asked what share of noncredit students later enroll in credit-eligible programs at their institution, nearly 90 percent of responding colleges said this happens less than 20 percent of the time. (See figure 16.)

FIGURE 16. Relatively few students are making the transition from noncredit to credit education.

Share of institutions where noncredit students make the transition to credit-eligible programs by percentage of students, 2019



Note: N = 334 responding colleges. Source: Opportunity America community college survey.

The onus is on educators to make good on the promise of stackability.

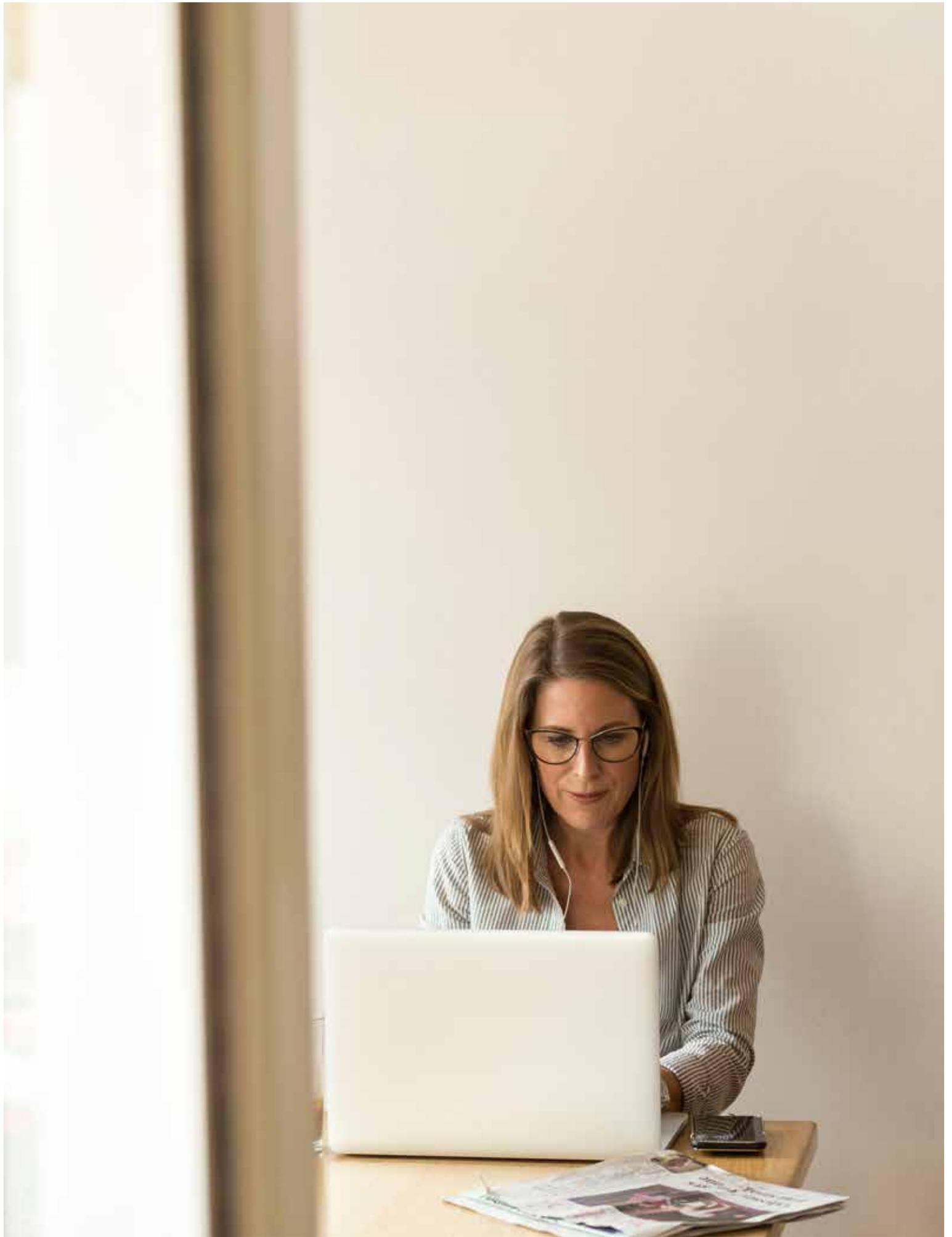
What isn't clear from the data: what's causing this logjam. Is the problem that colleges are reluctant to grant credit for prior learning—or that not many students return to college seeking credit for previous experience, whether an earlier stint of schooling, on-the-job training or a credential earned in another setting? Probably a little of both. But the onus is on educators to make good on the promise of stackability—and then to encourage more adult learners to come back to college for midcareer upskilling.

Much of what's needed is at the campus level. Credit and noncredit instructors need to agree on articulation agreements and credit equivalencies for industry certifications. Colleges need

to market themselves to older, working adults. Schedules, student services and program design all should be revamped.

But policymakers have a role to play, encouraging and incentivizing these changes on campus. Start by counting midcareer adults and tracking their employment outcomes—the value added by a short, job-focused noncredit college program. Revise state metrics for community colleges to take account of noncredit completions and certification attainment. Work with college departments to develop statewide articulation frameworks.

There is much that can be done, but the first, essential step is recognizing the centrality of midcareer adult students. As automation accelerates and more Americans need to retool, perhaps regularly, to keep up with a changing economy, working adults will likely become the most important consumers of community college workforce education.





FUNDING AND QUALITY CONTROL

It's difficult to keep track of the federal funding for postsecondary education that has flowed to state capitals since the onset of the pandemic. As of this writing, no money had been earmarked explicitly for job-focused education or workforce development. Reskilling was occasionally an allowable use, and some states chose to use stimulus money for worker training, often at community colleges.³¹ But however it was labeled, the money has flowed unstintingly, and states are awash with unanticipated federal funding—at least for now.

The challenge for policymakers: how to use this funding to maximum effect. Some students need help now and will continue to need help even as the economy recovers. But recent decades—two other big infusions of cash for higher education and workforce training, the American Recovery and Reinvestment Act (ARRA) of 2009 and the Obama-era Trade Adjustment Assistance Community College and Career Training (TAACCCT) grant program—hold essential lessons for today.

Most important, lawmakers need to distinguish between short-term needs and building for the future. Many states have yet to exhaust their Covid stimulus funding. There will be more money in years ahead as infrastructure dollars and other spending trickle down through the economy. But states that don't use this opportunity to rethink and rebuild are likely to regret it in future years.

States are awash with unanticipated federal funding—at least for now.

In this realm, too, our survey only scratches the surface. There is so much policymakers don't know and need to know about postsecondary workforce education in their states, particularly noncredit instruction. But our findings point to several critical areas where policy can make a difference, improving the quality of job-focused education and making it more widely available to more learners.

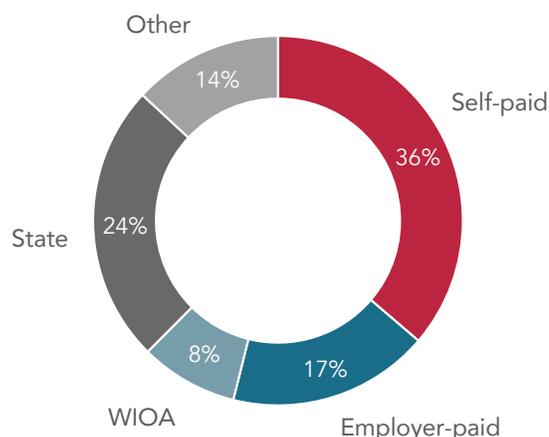
Funding

Workforce education is expensive. Many technical programs must purchase costly equipment and consumables. Instructors with industry work experience expect private-sector-level salaries, and unlike, say, English or sociology, phlebotomy cannot be taught in a lecture hall—hands-on learning requires a significantly lower student-teacher ratio.

Yet in most states, credit-eligible workforce programs are funded on a par with other academic offerings, and noncredit workforce programs lag far behind. As a practical matter, noncredit workforce education is ineligible for

FIGURE 17. Who pays for noncredit workforce education?

Funding for open-enrollment noncredit workforce education by funding source, 2019



Note: N = 311 responding colleges.

Source: Opportunity America community college survey.

federal financial aid—Pell Grants or student loans. And many states fund noncredit programs at a lower level than credit programs, if they fund them at all, leaving individuals and institutions scrambling to find ways to pay.

Our survey asked college administrators who paid for the noncredit workforce education on their campus. What share of funding for open-enrollment programs—everything but customized contract training—is covered by different types of spending, from military benefits to foundation scholarships?

Only about two-thirds of the colleges in the sample could provide a breakdown, and it varied widely from state to state, even from college to college. Many of their answers were likely estimates—the view from campus level—and a 50-state comparison of higher education funding might reveal a different picture. But the colleges tell a troubling story of learners left to their own devices to pay for workforce training.

The few states that offer full-time equivalent (FTE) or formula funding for noncredit education stand out in stark relief: North Carolina, California, Oregon and Florida top the list, according to campus-level educators. A handful of other

states—Virginia, Alabama, Colorado and New Jersey rank highest—offer state grants for noncredit workforce programs. But nationwide, FTE and formula funding covers the cost of just 12 percent of noncredit workforce education, and state grants pay for another 12 percent. (See figure 17.)

Still other states find ways to direct federal dollars to community college noncredit programs. Many look to Workforce Innovation and Opportunity Act (WIOA) funding, but the WIOA share rarely tops 10 percent, and nationwide, WIOA covers just 8 percent of noncredit workforce education. Other learners draw on means-tested federal benefits—everything from Temporary Assistance for Needy Families (TANF) to training grants from the Department of Health and Human Services.

The employer share ranges from close to nothing—less than 3 percent in California, Connecticut and Oklahoma—to more than half in Kansas and North Dakota. Nationwide, employers cover 17 percent of the cost—more than double what WIOA pays for.

But by far the largest share in most states is students paying out of pocket, often the learners

States digging out of the Covid crisis or looking ahead to the future of work may not have the luxury of waiting for Washington to act.

who can least afford it covering the cost of their own education. The student share comes close to half or more in 17 states and more than two-thirds in five states. Nationwide, noncredit workforce students cover 36 percent of their own tuition costs.

Many policymakers and policy thinkers, Democrat and Republican, recognize that the federal government should be playing a larger role. But they disagree about which agency and which federal funding stream.

Some argue that workforce programs are job training, not education, and they should be paid for with WIOA dollars. Others wonder why Pell Grants can cover the cost of any instruction on the credit side of college, regardless of quality—and whether learners earn credentials of value in the labor market—but not job-focused programs with a clear payoff for the student and the state economy.

Congress was considering a provision to offer federal student aid to noncredit learners in job-focused programs as this paper went to press. But states digging out of the Covid crisis or looking ahead to the future of work may not have the luxury of waiting for Washington to act. In the months ahead, as during the pandemic, some will likely direct discretionary federal dollars to job-focused noncredit community college programs. They and others should also seize the moment to rebuild for the future, revamping state funding formulas and competitive grants to put more priority on upskilling.

Models abound—from tiered formula funding in North Carolina to outcomes-based credential grants in Virginia. It's a moment for states to step up as the laboratories of democracy. What's at stake: not just opportunity and equity for job-focused students but also the state's future economic competitiveness.

Quality assurance

The primary challenge for state legislators allocating funding for noncredit workforce education is quality assurance. Job-focused noncredit programs are not vetted by regional accreditors or academic faculty committees—that's what allows them to respond quickly and nimbly to the labor market needs of students and employers. Most programs track relatively few data, and they report no information to federal education authorities.

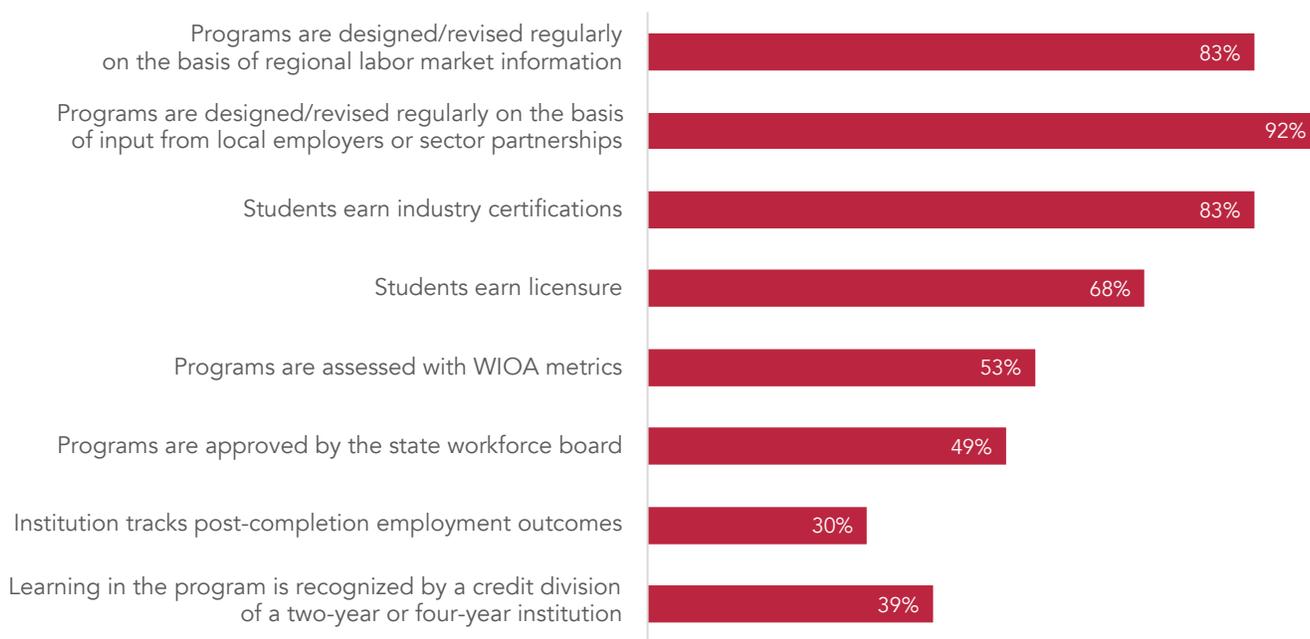
Noncredit educators often argue that they're subject to market discipline: if their programs didn't deliver, neither employers nor learners would be willing to pay for them. But that would change with state or federal funding, and lawmakers allocating taxpayer dollars need guardrails.

Our survey asked about the tools colleges currently use to monitor the quality and labor market relevance of their noncredit workforce programs, and we found a diverse mix, from employer input to WIOA metrics. We didn't ask that respondents specify what share of programs were held to each of these standards, and it likely varies from college to college. Still, our findings suggest widespread effort to safeguard the quality of job-focused instruction. (See figure 18.)

At the top of the list in virtually every state—and cited by 92 percent of colleges nationwide—was input from local employers or employer groups. Also robust, 83 percent of colleges reported that programs are designed or revised regularly on the basis of regional labor market information.

FIGURE 18. Colleges and states use a variety of tools to ensure the quality of noncredit workforce programs.

Percentage of institutions using various means to ensure the quality and labor market relevance of non-credit workforce programs, 2019



Note: N = 374 responding colleges.

Source: Opportunity America community college survey.

A third important metric: do students pass industry certification or licensure tests? Some 87 percent of responding colleges said they used this as a measure. Government performance standards—WIOA or Perkins Career and Technical Education Act metrics—appear to carry somewhat less weight, perhaps because neither federal spending stream covers the cost of many community college programs. Just over 60 percent of colleges say they rely on WIOA or Perkins performance standards.

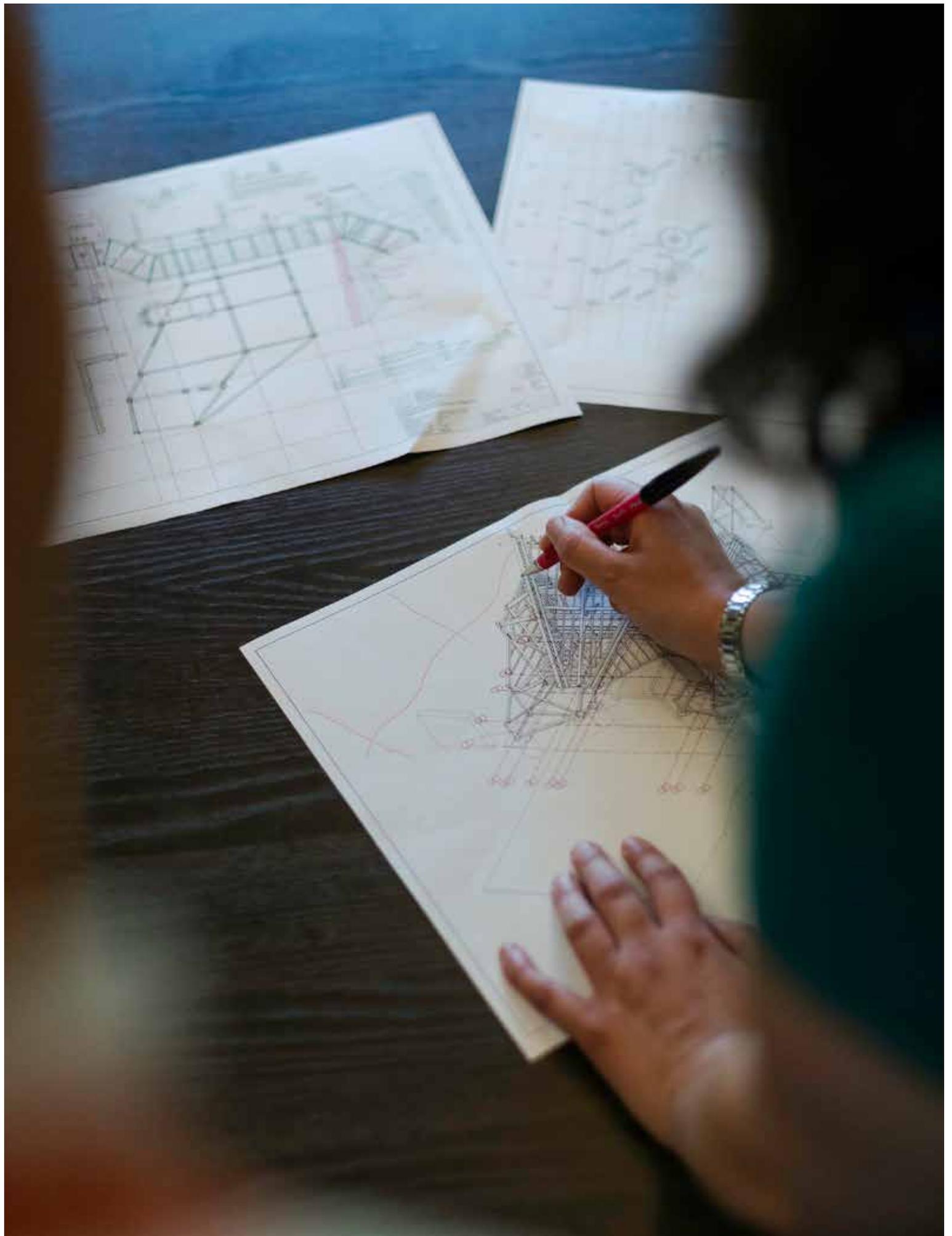
Disappointingly, fewer than three in 10 institutions look to the most telling, reliable metric—post-completion job placements and wages.

These findings on existing quality control don't solve the problem for legislators considering funding for noncredit workforce education programs. Policymakers still face the challenge of identifying standards and applying them

rigorously in ways that reward the most effective programs. But this existing practice can give lawmakers a place to start—something already in use on the ground that they can build on as they develop performance metrics.

Fewer than three in 10 institutions look to the most telling, reliable metric—post-completion job placements and wages.





RECOMMENDATIONS FOR POLICY

Our survey did not ask about public policy—state governance of community colleges or community college workforce education. That was beyond the scope of the project. But our findings highlight some clear needs that can be addressed at the state level.

The area that cries out most urgently for attention is noncredit workforce education—largely because it has been so neglected. But most of our recommendations will have ramifications for both sides of the college.

We recommend that lawmakers start by considering four pressing needs: data on noncredit workforce programs, mechanisms to align programs with the local labor market, tools to ensure that funding goes only to effective programs, and better pathways from noncredit to credit education.

Data

No matter how effective it is—what opportunities it creates for learners or how much it boosts economic competitiveness by meeting the needs of local employers—noncredit workforce education cannot hope to command the respect it deserves until we can measure and monitor it.

After decades in the shadows—the hidden college out of sight and out of mind—many noncredit educators are hard-pressed to account for what they do. Definitions of basic terms often vary from state to state and college to college.

Better data collection will
be expensive.

The data collected by state education authorities are inconsistent, making it difficult to compare states or develop national benchmarks. Most important—most damaging—it's all but impossible to assess the value of noncredit workforce education.

Do learners land jobs in their field of study? Do they earn higher wages than before they entered a college program? Do they return to college later in life for more education or training? We don't know and, in many states, can't even estimate.

Exactly what's needed will be different in every state—the starting point varies widely from place to place. And change will not be easy. Institutions that don't collect information can't report it to the state. Better data collection will be expensive. Many educators will find it disruptive, and it won't happen voluntarily. Meaningful change will require mandates and money.

But virtually every state can do a better job than it's currently doing, and without significant improvement nationwide, noncredit workforce education will remain an underused tool—a waste of a precious asset at a time of growing demand for job-focused reskilling.

Funding tied to labor market alignment

Workforce education, credit or noncredit, that isn't aligned with the local labor market is worthless—a waste of learners' time and taxpayers' money.

States allocating funding for noncredit instruction should find ways to help educators stay abreast of industry trends, and they should reward programs—credit and noncredit—that meet this test more generously than those that do not.

What's needed starts with more meaningful employer engagement. Most relationships will be local, and the onus is on campus-level leadership. But state policy can help, identifying what kinds of employer engagement have value, measuring it, perhaps establishing a taxonomy—from cursory advice to intensive collaboration—and encouraging educators to upgrade their relationships.

Policymakers can also encourage broader and more effective use of labor market information. Many colleges can't afford access to expensive job postings data; others lack the expertise to make full use of the information they purchase. States could help defray the cost. They could encourage colleges to collaborate with one another or with local workforce investment boards, sharing data or analysis of regional labor market trends. States could also make funding conditional on demonstrated college efforts to align programs with local employer demand.

Instead of support based on raw enrollment totals, some states ground community college funding in a vision of regional economic development.

Still a third potential tool: funding tied to economic value. Instead of support based on raw enrollment totals, some states ground community college funding in a vision of regional economic development.

Programs that deliver value by preparing learners for high-demand jobs and high-growth industries—perhaps advanced manufacturing or biomedical research—are funded more generously than those that don't, like cosmetology or landscape architecture. Kansas and North Carolina are among the states that have moved in this direction, revamping FTE funding formulas to reward credit and noncredit programs that create talent pipelines for growing industries. This promising approach should be enacted more widely.

Funding geared to employment outcomes

A related but separate metric goes beyond inputs—is instruction aligned with local labor market needs?—to track the results of workforce programs: student employment outcomes.

Do graduates land better jobs? Do they increase their earnings as a result of their time in college? Do they hold onto jobs and move up over time? Programs that achieve their objectives and hit their performance goals should receive more funding than programs that produce poor results.

After decades of experimentation and debate, more than 30 states now disburse some or all higher education funding based on student outcomes. But most look primarily to academic outcomes like completion and degrees—rarely the right yardsticks for noncredit workforce education. States allocating spending for noncredit programs should revamp funding formulas to take more account of employment outcomes like job placements and earnings.

One way to move in this direction: broader use of WIOA metrics—a suite of six performance standards that include job placements,

earnings and retention.³² Community colleges often resist WIOA reporting requirements, and many lack the tools they need to comply, including students' Social Security numbers and access to state data on graduates' employment outcomes.

But common metrics and closer cooperation would pay off for both community colleges and the public workforce system. States should consider experimenting with ways to better integrate the two networks—not merging them, as each brings distinctive strengths, but drawing on comparative advantage to build a better statewide web of job-focused education and training.

Building bridges between credit and noncredit education

Every college has its own terms, many of them all but incomprehensible to the general public: articulation of credit, credit for prior learning, credential equivalencies for industry certifications. But whatever we call it, it's the last frontier for educators and state education agencies seeking to make the most of noncredit workforce education.

Our survey findings underscore the need. Opportunities for crossover—transitions between credit and noncredit education—are sorely lacking, and relatively few learners take advantage of the opportunities that exist.

State policymakers have several tools at their disposal to help colleges build better bridges.

The first step is data. Colleges should start to track crossover behavior—noncredit students who enroll on the credit side of the college and credit students who take noncredit courses to prepare for certification or licensure exams—and report it to the state. Then states could offer incentives for improvement—more robust crossover, particularly from noncredit to credit.

Still another potential stratagem: competency-based industry certifications are among the best tools we have to align credit and noncredit

Competency-based industry certifications are among the best tools we have to align credit and noncredit instruction.

instruction. States seeking to encourage labor market alignment and crossover between credit and noncredit divisions should track attainment of industry certifications and reward it—a per-student subsidy, payable to the college, for every industry credential earned.

Some states play a still more active, interventionist role in encouraging colleges to build bridges between credit and noncredit education. Potential tactics include standardizing noncredit programs with a statewide common course numbering system and developing statewide articulation frameworks to guide decisions at the campus level.

Policymakers have many options, and more are coming online every day, as states around the country experiment with new tools to help workers reskill for a changing economy. What's important is that all states get started, finding ways to encourage and improve their two-year institutions' workforce programs.

Conclusion

Demand for workforce education is poised to explode in years ahead. If forecasters like the McKinsey Global Institute are right, tens of millions of Americans will need to change jobs in the next decade or two. Some will make do without reskilling. Others may be lucky—their new employer will train them. But many if not most will need to reboot on their own, and many will look to their local community college—particularly, if they're in a hurry, to its noncredit workforce education division.

Public two-year institutions are poised to step up, but there is much work to be done to make community college workforce education all it can be for learners, employers and the regional economy. Research has a role to play. Federal funding, even if only for some share of job-focused noncredit programs, could reshape the landscape. But ultimately, the most important

decisions are likely to be closer to the ground—at colleges and state education agencies.

The Covid economic shock was just the beginning. Even more dramatic change is on the horizon. State policymakers should start planning and building now. The future of work will not wait.





Appendix I

GLOSSARY

Workforce education. Instruction designed to provide students with the knowledge and skills they need to succeed in the workplace. May be credit-eligible or noncredit. Includes workforce programs open to any qualified student enrolled in the college and customized contract training offered on behalf of an employer for that employer’s incumbent workers. Other terms used in this paper to refer to workforce education include “job-focused programs” and “occupational education.”

Credit-eligible program. Coursework that results in one or more units of college credit that can be used to fulfill requirements for a degree or other credential issued by an academic institution. Contrasts with noncredit programs, which do not confer college credit. Not all students enrolled in credit-bearing programs seek degrees; some seek certificates, usually attainable in one year or less. But to distinguish credit from noncredit programs, this report sometimes uses the term “degree-seeking” to refer to students in credit-eligible programs.

Noncredit education. Programs and courses that carry no academic credit applicable toward a degree, diploma, certificate or other formal post-secondary award. Noncredit education may include occupational programs open to all qualified students at the college, customized contract training offered on behalf of an employer for that employer’s incumbent workers, developmental or remedial education, recreational or personal interest courses,

adult basic education and English as a second language instruction. To distinguish credit from noncredit programs, this report sometimes uses the term “nondegree-seeking” to refer to students in noncredit education programs.

Customized contract training. Job-related instruction offered by the college on behalf of an employer and generally paid for by that employer. Is often offered on-site in the workplace and usually open only to the employer’s incumbent workers. Contrasts with job-focused education and training available to any qualified student enrolled in the college.

Industry certification. A competency-based credential awarded by a trade association or other industry body to students who pass a standardized assessment of the knowledge and skills required to perform a specific job. Often needs to be renewed with continuing education or periodic exams. Contrasts with academic awards—certificates and degrees—issued by institutions of higher education and with other competency-based credentials, including licensure, issued by government bodies and professional associations.

Public workforce system. A national network of federal, state and local job training and employment services launched in the 1960s and currently funded by the 2014 Workforce Innovation and Opportunity Act (WIOA).

Students come to community college pursuing a variety of goals

NOT JOB-FOCUSED	JOB-FOCUSED
 Zach, 19, assumes he’ll have a career as a white-collar professional but hasn’t given much thought to which profession. He’s enrolled on the degree-granting side of the college, majoring in political science, and expects to transfer next year to a four-year university.	 Jenny, 18, is studying to be a nurse. She’s enrolled in the degree-granting side of the college because nursing requires a degree.
 Marisol, 25, wants to learn English. She’s enrolled in a nondegree-granting program that teaches basic skills.	 Yvette, 29, is studying to be a certified nursing assistant—no degree needed. She’s enrolled in a nondegree-granting program that will prepare her for a state certification exam.
 Barbara, 45, wants to learn French cooking. She’s enrolled in a nondegree-granting program that teaches recreational skills.	 George, 38, is learning advanced welding techniques in a nondegree-granting customized contract program sponsored by his employer.

Appendix II

METHODOLOGY

In October 2020, Opportunity America, Lumina Foundation and Wilder Research went into the field with a national survey of community college educators. The survey consisted of 57 multiple-choice and open-ended questions requesting detailed data about the colleges' credit and noncredit workforce programs and their relationships with employers. All questions in the study asked about fiscal year 2019.

A total of 1,259 institutions were invited to participate in the study, including all publicly funded two-year institutions with Title IV student-aid-eligible programs accredited by an accrediting body recognized by the US Department of Education. Nearly half of invited colleges answered at least one question, and 477 provided more robust replies, for a 38 percent response rate. (See Table A1 for state-by-state tallies of the number of colleges invited, the number that responded and corresponding state response rates.)

For a full description of the study methodology, including a detailed account of how the sampling frame was developed and the survey administered, see Wilder Research, "Community college workforce education study: Methodology report and data book," 2021, <https://opportunityamericaonline.org/wrdataandmethodology/>.

The data reported in this paper reflect the responses provided by participating colleges only and may not be representative of all community and technical colleges. Colleges could

pass over survey questions they were unable to answer. Missing and unknown responses were omitted from calculated percentages. Every figure in the paper includes the number of colleges that responded, as it varies appreciably across questions. Percentages may not sum to 100 percent due to rounding.

Opportunity America promised responding colleges that their results would be confidential. Results for states with two or fewer institutions have been omitted from this report except in cases where responding colleges waived their anonymity. All responding colleges are included in aggregate national calculations.

The survey findings are supplemented by data from the National Student Clearinghouse (NSC) Research Center. NSC provided state- and national-level aggregate information on credit-eligible enrollments by declared major. Data from 2019 were provided for all the colleges that responded to the survey.

Opportunity America used the US Department of Education's Classification of Instructional Programs (CIP) taxonomy to classify these enrollments as "job-focused" or "not job-focused." Job-focused refers to students with declared majors in fields of study designated by the taxonomy as occupational education. Enrollments by students with declared majors in other fields or who have not yet declared a major are considered not job-focused. (See Appendix III.)

Table A1. Survey response rates at the state and national levels

State	Invited	Completed	Response rate
Alabama	24	5	21%
Alaska	1	0	0%
Arizona	22	8	36%
Arkansas	23	16	70%
California	131	44	34%
Colorado	18	7	39%
Connecticut	14	10	71%
Delaware	2	1	50%
Florida	75	15	20%
Georgia	27	7	26%
Hawaii	7	7	100%
Idaho	4	4	100%
Illinois	50	18	36%
Indiana	2	2	100%
Iowa	16	9	56%
Kansas	26	8	31%
Kentucky	16	16	100%
Louisiana	14	14	100%
Maine	7	7	100%
Maryland	16	6	38%
Massachusetts	24	9	38%
Michigan	31	10	32%
Minnesota	32	7	22%
Mississippi	15	2	13%
Missouri	29	6	21%
Montana	17	9	53%
Nebraska	9	3	33%
Nevada	4	3	75%
New Hampshire	7	7	100%
New Jersey	22	5	23%
New Mexico	19	7	37%
New York	67	18	27%
North Carolina	57	20	35%
North Dakota	6	5	83%
Ohio	75	22	29%
Oklahoma	45	4	9%
Oregon	17	8	47%
Pennsylvania	43	17	40%
Rhode Island	1	1	100%
South Carolina	21	6	29%
South Dakota	5	2	40%
Tennessee	39	22	56%
Texas	59	32	54%
Utah	10	4	40%
Vermont	2	1	50%
Virginia	27	21	78%
Washington	34	10	29%
West Virginia	23	2	9%
Wisconsin	17	7	41%
Wyoming	7	3	43%
US	1,259	477	38%

Appendix III

ACADEMIC AND OCCUPATIONAL MAJORS

US Department of Education postsecondary taxonomy by Classification of Instructional Programs (CIP) codes*

Academic education

Visual and performing arts

Humanities

- Foreign languages
- Liberal arts
- Philosophy and religious studies

Interdisciplinary studies

English/letters

Natural sciences and mathematics

- Biological sciences
- Physical sciences
- Mathematics

Social sciences and history

- Social sciences (anthropology, economics, geography, political science/government, sociology)
- Area/ethnic studies
- History
- Psychology

Occupational education

Agriculture and natural resources

- Agriculture
- Natural resources

Business and marketing

Communication and communications technologies

- Communication and journalism
- Communications technologies

Computer and information sciences

Consumer services

- Family and consumer sciences (child care, family studies, nutrition services)
- Personal and culinary services
- Parks, recreation and fitness

Education

Engineering, architecture and science technologies

- Architecture
- Engineering
- Engineering technologies
- Military technologies
- Science technologies

Health sciences

Protective services

- Protective services
- Military science

Public, legal and social services

- Legal professions and studies
- Library science
- Public administration and social services
- Theology and religious vocations

Manufacturing, construction, repair and transportation

- Construction
- Repair
- Manufacturing
- Transportation

* Credit-eligible programs only

ENDNOTES

1. The data reported here and throughout this paper reflect the responses provided by participating colleges only and may not be representative of all community and technical colleges. Responding colleges reported data on their students, programs and employer partners, and our findings average those individual college responses. Colleges could pass over survey questions they were unable to answer; missing responses were excluded from calculated percentages. All questions in the study asked about fiscal year 2019.
2. Olivia Rockeman, "U.S. Job Openings Hit New Record in June, Surpassing 10 Million," *Bloomberg*, August 9, 2021, <https://www.bloomberg.com/news/articles/2021-08-09/u-s-job-openings-rose-to-fresh-record-high-in-june>.
3. Opportunity America Working Group on Community College Workforce Education, *The Indispensable Institution: Reimagining Community College*, June 2020, https://opportunityamericaonline.org/wp-content/uploads/2020/06/Indispensable_Inst_FullReport.pdf.
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11. Our sample frame included all publicly funded two-year institutions with Title IV student-aid-eligible programs accredited by an accrediting body recognized by the US Department of Education. As a practical matter, this frame netted 1,071 community and technical colleges, but also 198 adult vocational education centers and hybrid schools serving both secondary and postsecondary students.
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14. Opportunity America community college survey and Opportunity America's calculations using the US Department of Education National Postsecondary Student Aid Study 2015–16, accessed via PowerStats. Like all the findings in our study, the figure for noncredit students reflects the average of responses provided by participating colleges.
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16. In the context of credit education, "job-focused" refers to enrollments by students with declared majors in fields of study determined by the US Department of Education's Classification of Instructional Programs (CIP) taxonomy to be occupational education. Enrollments by students with declared majors in other fields or who have not yet declared a major are considered "not job-focused." (See US Department of Education, Institute of Education Sciences, National Center for Education Statistics, "Postsecondary Taxonomy," https://nces.ed.gov/surveys/ctes/tables/postsec_tax.asp.) In the context of noncredit education, "job-focused" refers to enrollments in programs open to any qualified student enrolled in the college and customized contract training provided by the college on behalf of an employer. "Not job-focused" noncredit enrollments are students enrolled in all other types of noncredit education, including remedial, personal interest and other programs.
17. Opportunity America calculations based on Opportunity America community college survey and National Student Clearinghouse Research Center, "Fall 2019 Current Term Enrollment Estimates," December 16, 2019, <https://nscresearchcenter.org/current-term-enrollment-estimates-2019>.
18. Most of the findings on noncredit students presented in this chapter include students enrolled at the college and learners in customized contract training programs provided by the college for a local employer and open only to company employees. Unless specified, data in later chapters do not include customized contract trainees. The findings in those chapters represent participating colleges' answers to questions about programs open to any qualified student enrolled in the institution.

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19. Our estimate of the number of noncredit students nationwide rests on two pillars: our survey findings and the American Association of Community Colleges' (AACC) annual estimate of credit-eligible community and technical college enrollments. The colleges that responded to the survey reported that in fiscal year 2019, credit-eligible students accounted for an average 65 percent of their unduplicated enrollments, while noncredit students accounted for 35 percent—a ratio of 1.85:1. According to the AACC, in 2019, there were 6.8 million students enrolled in credit education at public two-year colleges across the US. Using that number and the ratio reported by the colleges in our sample, we estimate that 3.7 million noncredit students were enrolled in community and technical colleges that year. See the Opportunity America community college survey and American Association of Community Colleges, "Fast Facts 2021," www.aacc.nche.edu/wp-content/uploads/2021/03/AACC_2021_FastFacts.pdf.
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21. Opportunity America's calculations using National Student Clearinghouse Research Center, "Fall 2019 Current Term Enrollment Estimates," <https://nscresearchcenter.org/current-term-enrollment-estimates-2019/>.
22. *Job-focused* programs are designed to provide students with knowledge and skills to succeed in the workplace. *Remedial* or basic skills instruction is designed for students lacking the general skills required for postsecondary education, including in some cases, basic literacy, numeracy and computer skills and English as a second language. *Recreational* programs provide instruction in topics of personal interest and skills required for leisure activities.
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24. Preston Cooper and Tamar Jacoby, *Essential Workers: Middle-Tier Health Care Jobs in New York City*, Opportunity America, March 2021, <https://opportunityamericaonline.org/wp-content/uploads/2021/03/EssentialWorkers-final.pdf>.
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26. The number of community colleges per state varies widely, sometimes but not always correlated with population size, from one institution in Rhode Island to 131 in California. Our survey promised participating colleges that their individual responses would remain confidential. As a consequence, while our aggregate national findings include any college that responded to the survey, on some measures we are unable to report aggregates for states with just one or two colleges or where only one or two institutions participated in the study.
27. Our taxonomy distinguishes between employer partner/customers and contract training clients. Partner/customers collaborate with the college on programs open to any qualified student enrolled in the institution, while programs offered—and paid for—by contract training clients are open only to the firm's incumbent workforce. But due to an ambiguity in the survey questionnaire, some colleges may have counted some employers twice, and there may be some overlap between partner/customers and contract training clients.
28. US Department of Labor, Bureau of Labor Statistics, "State Employment and Unemployment—June 2021," press release, July 16, 2021, <https://www.bls.gov/news.release/pdf/laus.pdf>.
29. Oklahoma Department of Commerce, "Oklahoma Aerospace Brief," <https://www.okcommerce.gov/wp-content/uploads/Oklahoma-Aerospace-Brief.pdf>.
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31. Among the states that used discretionary Coronavirus Aid, Relief and Economic Security (CARES) Act funding for workforce education, Texas earmarked \$46.5 million in targeted financial aid for displaced workers reskilling at community colleges. Florida set aside \$35 million to help learners pay for short community college programs that led to credentials with value in the local labor market. And Virginia dedicated \$30 million to subsidize noncredit programs retraining workers for high-growth, high-demand industries. Louisiana, Michigan, Ohio and South Dakota also used federal stimulus dollars for reskilling.
32. US Department of Labor, Employment and Training Administration, "WIOA Performance Indicators and Measures," <https://www.dol.gov/agencies/eta/performance/performance-indicators>.



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