



KENNEDY & COMPANY



USC AIKEN STRATEGIC PLANNING
STRATEGY ASSESSMENT

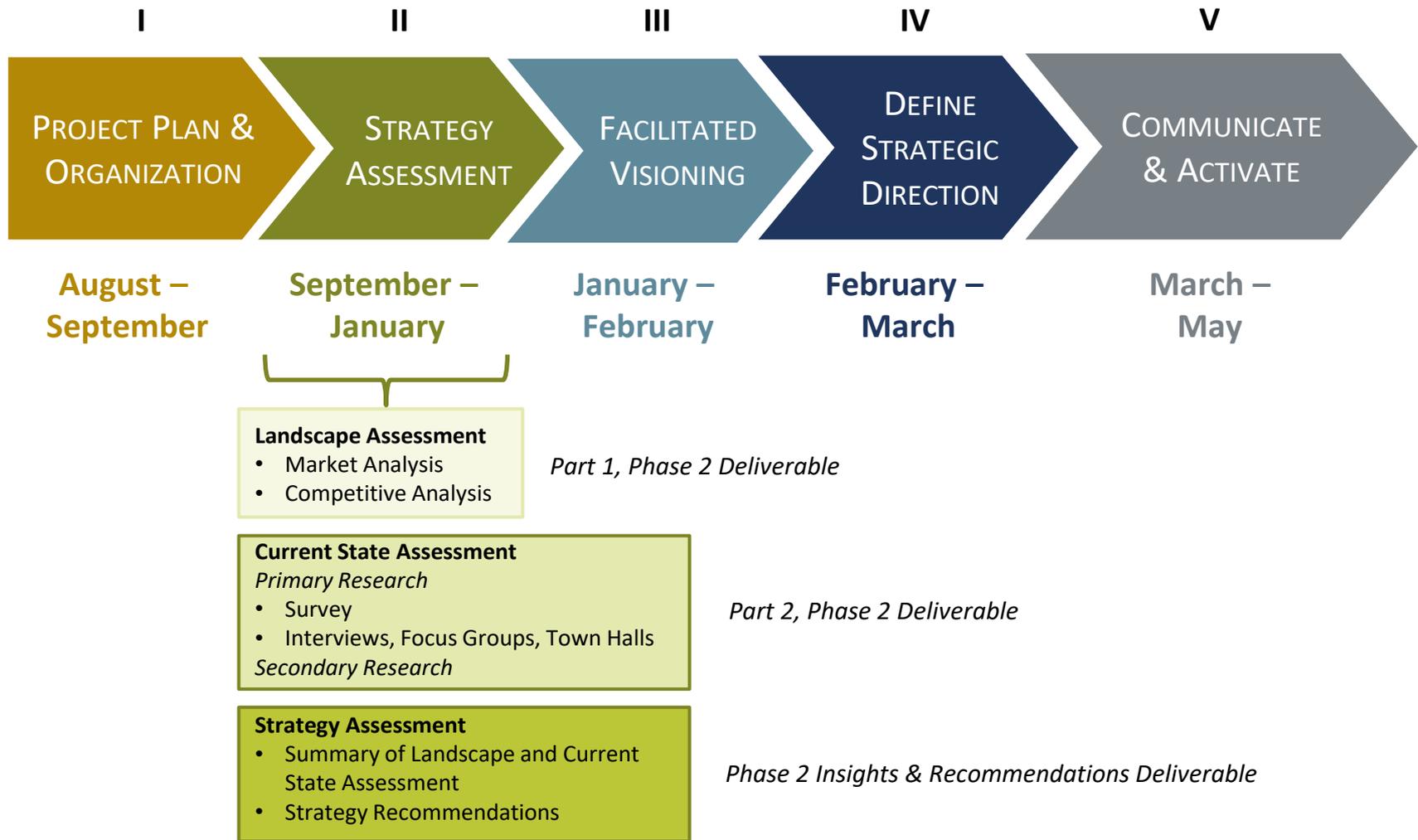
January 2023

2023 KENNEDY & COMPANY EDUCATION STRATEGIES LLC

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STRATEGIC PLANNING TIMELINE & PROGRESS



THE LANDSCAPE FOR UNDERGRADUATE PROGRAMS IN SC IS CHALLENGING

- ❖ National trends show enrollment down in both Associate's (-21.6%) and Bachelor's (-7.3%) programs since 2018, whereas graduate program enrollment has increased 5.7%.
- ❖ The online education pie is shrinking, with tuition discounts at an all time high. Online students continue to favor local (within 50 miles of home), though 79% of students prefer fully online, not hybrid, programs.
- ❖ The population of high school age students in SC is steadily decreasing, and those enrolling in college immediately out of high school has a downward trend as well. The push for USC Columbia to admit a higher percentage of in-state students is further constraining the pipeline of traditional students for USCA.
- ❖ The region has strong job growth and low unemployment, but average pay is \$13,000 below the national average while cost of living is only slightly lower than the national average, creating a notable gap in discretionary income. Financial accessibility is critical to meet the economic constraints of families in the region.
- ❖ Both federal and state appropriations to USCA are notably lower than those to USC Columbia - USCA received 74% of the federal and 75.5% of the state appropriations per student of Columbia. While state funding has favored the technical college system in recent years, USCA is still slightly above area technical colleges, and state funding has been roughly in line since 2017.
- ❖ A number of scholarship and assistance programs for students in South Carolina favor those pursuing technical college (CARES Act) and STEM degrees (Palmetto and LIFE), placing bachelor's degrees, particularly in the liberal arts, at a disadvantage.

Gov. McMaster designates additional \$25 million for technical college scholarships

Tuition and required fees at the state's sixteen technical colleges will be covered for South Carolina residents (adults and recent high school graduates) enrolled in a high-demand field such as healthcare, manufacturing, hospitality/tourism, construction, transportation, distribution and logistics, criminal justice, early care and education and human services

KNOCKING
AT THE COLLEGE DOOR

South Carolina total high school graduates are projected to peak in 2026 at 59,030 graduates

IT'S NOT SO DIRE! MARKET OPPORTUNITIES EXIST AMIDST THE CHALLENGES

- ❖ USCA's backyard is slightly below the national average for residents with Bachelor's and graduate degrees (20% and 12%, respectively). Roughly a third of the population aligns with the target market for traditional and non-traditional college students, and non-traditional students could help offset the shrinking traditional population.
- ❖ The ten largest school districts in South Carolina accounted for 46% of the state's graduates in 2022. The Aiken school district had the tenth largest total number of graduates this spring. This allows for a targeted, efficient high school recruiting effort.
- ❖ Dual enrollment is a strong potential feeder. 14.4% of all graduating high school seniors in South Carolina (8.4K students) had participated in dual enrollment in 2022.
- ❖ National graduate completions have increased 8% and post-baccalaureate certificates 47% from 2017 to 2021, signaling a notable opportunity in graduate education.
- ❖ International applications are on the rise in the US, with COVID restrictions and visa requirements loosening.
- ❖ The 50-mile radius around USC Aiken has a much higher population of veterans than the national average for areas of comparable size— 85K vs. 57K, respectively. Students with military connections have graduated at a higher rate (92.6%) than SC's average (83.8%).
- ❖ Direct enrollment has gained traction as a fast-growing trend in college admissions, particularly for schools that draw heavily from their home state.
- ❖ The American Families Plan included an increase to the maximum Pell grant by \$1400, doubling of scholarships for future teachers, and a \$62B grant program to support completion and retention activities at institutions that serve high numbers of low-income students.



Within 150 miles of Aiken, the top three largest industries are in **food service, education, hospitals, and local government.**

JOB MARKET HIGHLIGHTS SKILLS NEEDS FOR GRADS

- ❖ 42% of job postings in USCA's back yard are for Associate's degrees or higher; 35% for Bachelor's degrees or higher.
- ❖ A Bachelor's degree is nearly a requirement for positions in IT and business, and a broader range of industry sectors beyond healthcare in the area seek Bachelor's degree holders over Associate's degrees.
- ❖ Some regional occupations are growing at 3-6 times the national average, with data scientists, medical and health services managers, and software developers and testers topping the list. Financial Managers, Medical Assistants, Teachers (Preschool and Postsecondary), and a range of analyst roles round out the top ten.
- ❖ IT is cooling, notably so recently with the layoffs across top national companies.
- ❖ Soft skills that had the most frequent mentions in regional job posts include: problem solving, coordination, detail-orientation, planning, customer service, research, and communications – all areas that could be a focus of either the gen ed curriculum, applied learning experiences, or both.

"If we're hiring based on skills, that's going to open up much more opportunity for a more equitable and diverse workplace. That doesn't mean that there's less value to a degree, but there are more avenues to those who earn those skills other ways, too."

In that more competitive landscape... colleges should think in terms of "both-and"—delivering a four-year degree grounded in the liberal arts that remains the best preparation for a lifetime career, yes, but also building into their curricula more practical digital and other skills that can help graduates compete for a first job.

*-Inside Higher Ed**

Over half of Aiken alumni with online profiles remain in SC, with 15% in Aiken itself. These alumni are an incredible resource for hiring, mentoring, and financial support.

* Lederman, Doug. (2023, January 10). Preaching to, and challenging, the Liberal Arts choir. Inside Higher Ed. Retrieved from <https://www.insidehighered.com>

COMPETITIVE ADVANTAGE WILL COME FROM THE HOW, NOT THE WHAT

Our competitive research indicated that many institutions are touting similar strengths to those of Aiken – small class size, leadership/applied learning experiences, military community. USCA will need to better define/change how it does these things in order to differentiate itself.



Potential areas of differentiation

- ❖ **Curriculum & Pedagogy:** Gen ed requirements that allow for exploration; sustainable improvements to course content and pedagogy; ease of credit transfer, major change, and pursuit of minors or other credentials; rebranding and integration of the liberal arts with key soft and hard skills needed to be career-ready can appeal to new students as well as retain current students.
- ❖ **Career Outcomes:** A top 3 characteristic prospective students (and likely their families) look for in a college, a clear focus with tangible activities and reportable outcomes will bolster the value proposition.
- ❖ **Affordability:** While well-positioned compared to its peers in terms of cost and affordability, USCA is less competitive with neighboring states. Resources for students and families to help understand all funding options and future loan payoff considerations based on career field, as well as improved career outcomes, would enhance the perceived ROI of USCA.
- ❖ **Student Life:** Improved facilities and dining options will meet the basic physiological needs of students and would go a long way, as would special interest housing that promote academic progress and sense of belonging. Augmenting athletics and other campus events would also bolster campus life and connectivity to the community. Narrower exemptions to the live-on requirement or expansion to two years have the potential to pay off in community building as well as revenue.
- ❖ **Leadership:** Several peers incorporate leadership education or training into multiple facets of the student experience, including service-learning opportunities, peer education, one-class courses, and Fellows programs. How might USCA do this and leverage its military connectivity?
- ❖ **Undergraduate Research Opportunities:** Many schools in the peer set tout this, and Aiken can stand out by highlighting that experiential learning and partnering with faculty are not only broadly available but also accessible to first-year students.

GRADUATE CURRICULAR OPPORTUNITIES ALIGN WITH FACULTY INTEREST

Instructional programs identified in the landscape assessment as high potential* overlap with many topics faculty identify as great opportunities for USCA.

High Potential Areas: Post-Baccalaureate Certificates

CIP Name (4-Digit)	Market Opportunity	Stakeholder Interest
Biomathematics/Bioinformatics	✓	✓
Special Education	✓	✓
Small Business Operations	✓	✓
Registered Nursing	✓	✓
Social Foundations of Education	✓	✓
Communication Disorders	✓	✓
Mental & Social Health Services	✓	✓
Gerontology	✓	
Arts & Media Management	✓	✓
Ethnic Studies	✓	✓
Pharmaceutical Sciences	✓	
Public Health	✓	✓

High Potential Areas: Master's Degrees

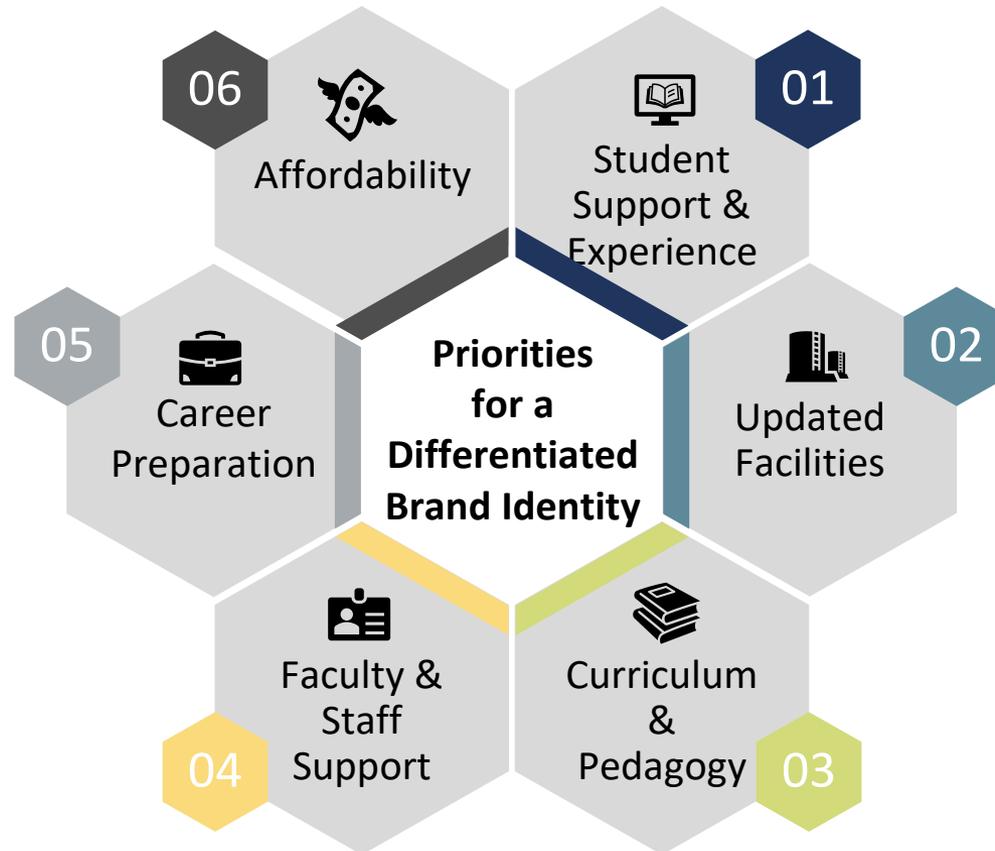
CIP Name (4-Digit)	Market Opportunity	Stakeholder Interest
Hospitality Administration	✓	
Health Preparatory Programs	✓	✓
Construction Engineering	✓	✓
Computer Media Applications	✓	✓
Materials Engineering	✓	✓
Wildlands Science & Management	✓	✓
Small Business Operations	✓	✓
Political Science	✓	✓
Natural Resources Conservation	✓	✓
International Relations	✓	✓
Chemistry	✓	✓
Gerontology	✓	

Several of the academic fields are already popular in the region at the bachelor's level. Growth in certificates and master's degrees can appeal to those graduates looking to continue their education.

* Defined as few degree completions within a 150-mile radius of Aiken with high projected two-year growth

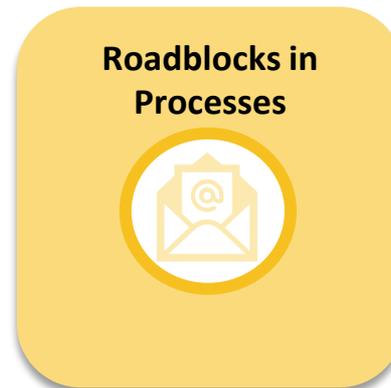
STAKEHOLDERS PRIORITIZE STUDENT EXPERIENCE & SUCCESS

Students are USCA's primary constituency, and their experience and success is not only prioritized by stakeholders but also the USC System. Centering mission and vision on students benefits not only the students themselves but also internal and external stakeholders.



INTERNAL CAPABILITIES & CONSTRAINTS COULD HAMSTRING EFFORTS

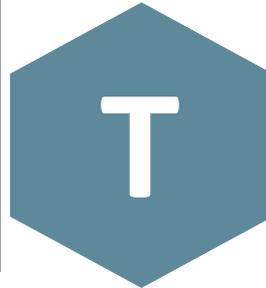
The USCA community is hopeful about the future of the institution, and readily acknowledges the present state of affairs. The success of the new strategic plan relies on simultaneously planning for tomorrow and addressing today's threats to that future.



INSIGHTS CULMINATE IN USCA'S SWOT

Strengths:

- Student-centered experience
- Teaching focus
- Affordability/Value
- Accessibility of applied learning experiences (early and numerous)
- Quality of Faculty
- Collegiality/sense of community
- Military connections
- Campus size
- Savannah River Site & DOE



Weaknesses:

- Lack of differentiated brand identity
- Under-resourced faculty & staff
- On campus student experience – student life, housing, dining, athletics
- Student, staff, & faculty retention
- Aging facilities
- Marketing/website
- Internal communications
- Clunky technology/data management



Opportunities:

- Value proposition at the intersection of tech schools & R1 (career-ready hard & soft skills)
- More flexible & targeted gen ed curriculum
- Build depth & breadth in applied learning experiences
- Tap into regional alumni for hiring, mentoring, annual gifts
- Dual enrollment, direct enrollment, military feeders
- Align incoming classes with adjusted curriculum/staffing
- County/city partnerships

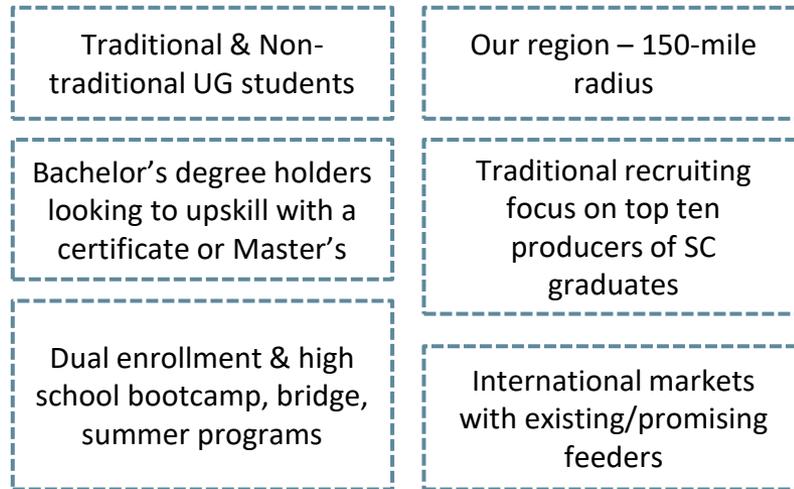
Threats:

- Importance of student life & career outcomes vs. current state
- Legislative climate for higher ed/liberal arts
- Quiet quitting; faculty and staff morale
- Knowledge & efficiency gaps with turnover
- USC system constraints on hiring, budget, technology
- Perceived lack of leadership transparency

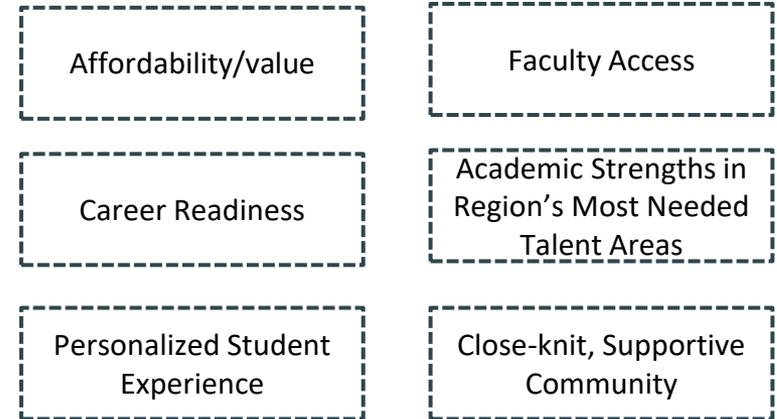


STRATEGY RECOMMENDATIONS: WHERE WILL WE PLAY?

Which Markets?

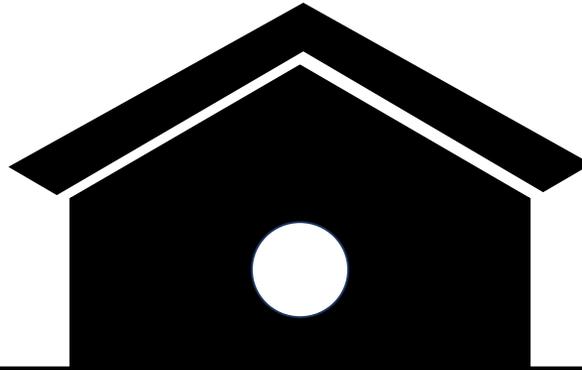


Market Position?



- ❖ Build an early pipeline for traditional students through dual enrollment and revenue-generating “bootcamp”, bridge, and summer programs for prospective students.
- ❖ Increase focus on recruitment of non-traditional students who either did not immediately attend college or did not finish to offset decline in traditional students.
- ❖ Tap into military families both as feeders of traditional and non-traditional students, and as guides to establish a leadership development program.
- ❖ Double-down on retention efforts, particularly those who transfer out for financial reasons or “breaks.”
- ❖ Focus academic investments in areas most needed by industry in the region – health care, finance/banking, education, data analytics. Build post-baccalaureate certificate and master's degree programs in areas that align with existing faculty strengths, gaps in the competitive market, and regional employer needs.
- ❖ With an already strong and highly competitive RN program, focus on other programs in the health care field – both those that are for health care practitioners, and those that support the business and operations of health care.
- ❖ Do not focus heavily on programs in IT. This industry is cooling, and the cost of faculty and resources in this area are high.

STRATEGY RECOMMENDATIONS: HOW WILL WE WIN? (1 OF 4)



Define Differentiated Brand Identity

Revamp Gen Ed Requirements & Update Curriculum & Pedagogy

Adapt UG Target Population and Align with Curriculum & Resources

Improve Campus Experience

Ensure Cyber Can Meet Expectations & Investments

Expand Applied Learning & Career Management Resources

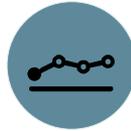
Facilitate Access

Grow Post-baccalaureate Certificate & Master's Degree Offerings & Enrollment

STRATEGY RECOMMENDATIONS: HOW WILL WE WIN? (2 OF 4)

Adapt UG Target Population & Align with Resources

- Set undergraduate targets & profile to align academic & social preparedness with the revamped curriculum as well as staff and faculty resources.
- Increase focus on in- and out-bound transfers and non-traditional students.



Define Differentiated Brand Identity

- Develop differentiators & proof points tied to the mission, vision, and strategic planning output
- Overhaul website and marketing materials



Ensure Cyber Can Meet Expectations & Investments

- Expectations are high and investments have been made for Cyber, which was intended to serve as a brand differentiator for USCA.
- The partnership needs to get the initiative on a path to a short-term positive benefit and deliver on the MOU, or it needs to be cut to avoid negative brand impact.

Facilitate Access

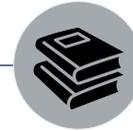
- Lower barriers to pursue education through direct admission & dual enrollment programs
- Retool orientation to meet the needs of today's USCA student & ease the transition to college
- Maintain cost & affordability by leveraging increased Pell Grant money & funds for teachers, among other funding options



STRATEGY RECOMMENDATIONS: HOW WILL WE WIN? (3 OF 4)

Improve Campus Experience

- Require more students to live on campus
- Evolve dining options, including partnerships with restaurants in the community
- Create naming opportunities for existing buildings and residence halls to fund their upfit
- Consider city/county partnership for buildings that house arts and athletic events



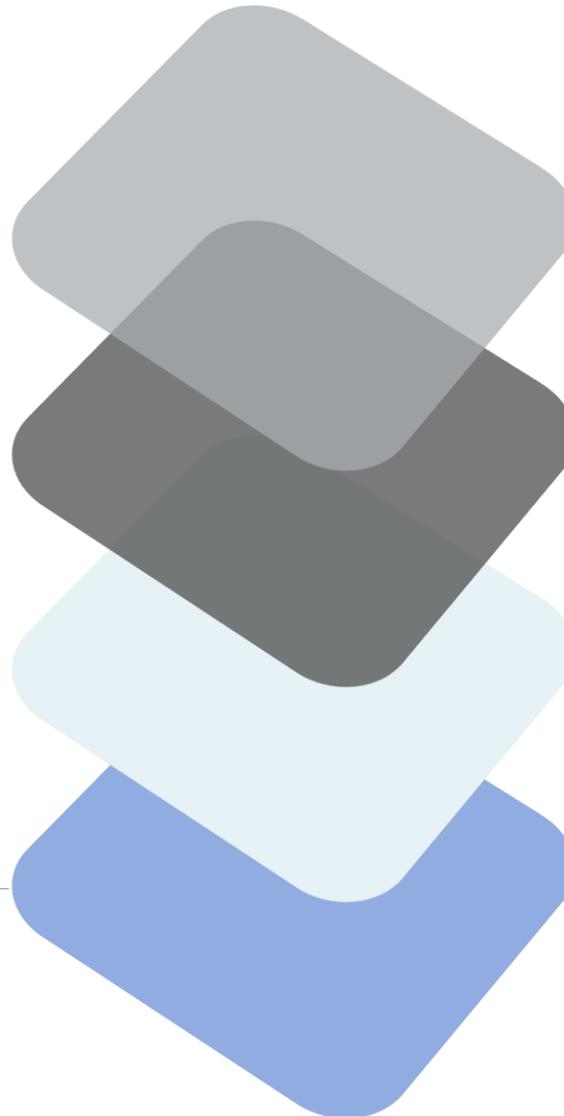
Revamp Gen Ed Requirements & Update Curriculum & Pedagogy

- Focus on the fundamental soft and hard skills of career readiness
- Facilitate transfers and major changes
- Create a badging/certificate awarding process to provide credentials for skills gained/areas studied beyond the major and through applied learning experiences
- Review existing courses and programs to ensure optimal class sizes, efficacy towards learning objectives, consistency of student-centered learning, and up-to-date content/pedagogy

STRATEGY RECOMMENDATIONS: HOW WILL WE WIN? (4 OF 4)

Grow Post-baccalaureate Certificate & Master's degree Offerings

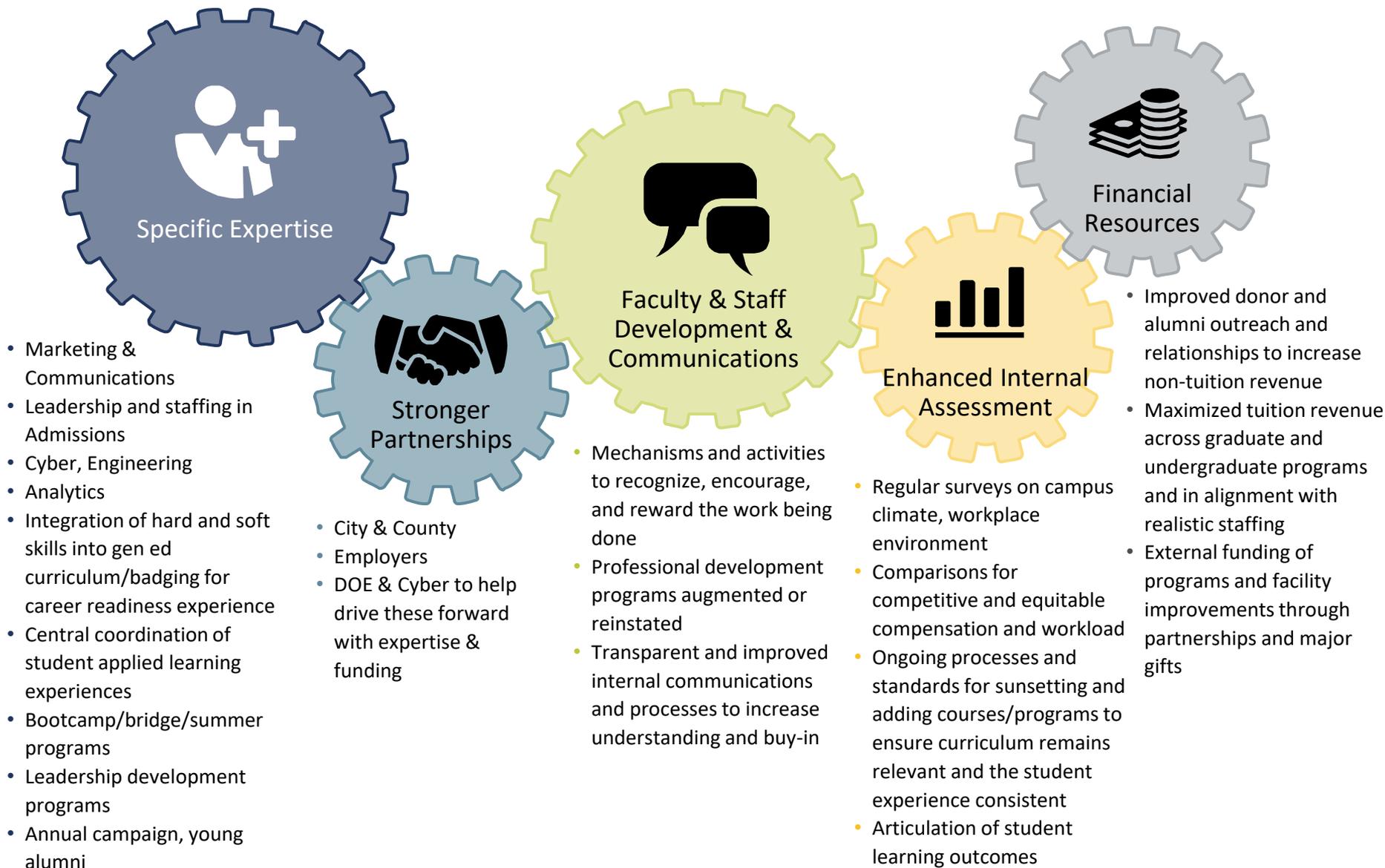
Offer credentials that allow for lifelong learning and career success, build upon existing faculty strength, & are relevant to local employers (health care, finance/banking, education, data analytics).



Expand Applied Learning & Career Management Resources

- Provide centralized support for marketing & administration of faculty-mentored research, work-study, on and off-campus internships, student fellows programs, leadership opportunities
- Broaden and deepen opportunities so all students have access to one or more
- Create a leadership development program in partnership with the military programs
- Invest in career planning to provide guidance, support, & tracking of post-graduate outcomes

STRATEGY RECOMMENDATIONS: WHAT CAPABILITIES DO WE NEED?



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