Edison State College
Florida Gulf Coast University

An Innovative State College/State University Partnership:
Access, Alignment, and Affordability in Charlotte County

Submitted by the Exploratory Task Force
September 12, 2008
EXECUTIVE SUMMARY

The emergence of Florida’s State Colleges presents a unique opportunity to leverage the strengths of the new system and the State University System in service to the people of Florida. Edison State College (ESC) and Florida Gulf Coast University (FGCU) are proud to announce a bold new synergistic partnership that will foster the establishment of a center for comprehensive higher education in Charlotte County at the existing Edison Campus there. More than a shared facility, Presidents Walker and Bradshaw envision a campus in Charlotte County that will transform lives by offering opportunities to pursue higher education along a continuum that stretches from a collegiate high school through graduate education and beyond, embracing the concept of lifelong learning. The campus will offer a wide variety of programs and services that will act as catalysts for economic development by further diversifying the economy of the region and facilitating its continued growth.

This innovative partnership, the first of its kind to engage a state college and a state university in Florida, is based upon the following goals:

♦ Providing robust higher educational opportunities in Charlotte County with seamless educational pathways and clear articulation agreements from high school through associate, baccalaureate, and graduate degrees

♦ Serving as a catalyst of economic development for the community

♦ Building upon the strengths of both ESC and FGCU by sharing academic, student service, technical infrastructure, and physical resources, thus maximizing community benefits

♦ Providing coordinated degree offerings so that each institution builds upon the unique elements of its academic programs without duplicating resources

♦ Sharing the expertise of faculty and staff by capitalizing on their abilities and applying their services to serve a conjoined student body

♦ Establishing a unified strategy that can be sustained by a dependable revenue stream generated by student enrollment and State funding
Creating a student life environment that meets the academic and extracurricular needs of students pursuing associate, baccalaureate, and graduate degrees or those fulfilling lifelong learning goals

Charlotte County continues to grow in population but is not keeping pace with the state of Florida and the United States in educational attainment. In order to diversify its economy, it will be necessary to significantly increase degree production at all levels, but especially at the baccalaureate level. ESC and FGCU propose an ambitious agenda for program expansion that will add 12 bachelor’s degree programs and 2 master’s degree programs within the next five years. These programs are aligned with demonstrated need and demand and complement the existing associate degree base offered in Charlotte County. These programs will also provide access to affordable higher education within the county itself.

Proposed programs, beginning in Academic Year (AY) 2009-2010, include the B.A. in Special Education, B.A. in Early Childhood Education, B.S. in Elementary Education, and a B.A.S. in Public Safety Management as well as one in Supervision and Management. This will be followed in AY 2010-2011 by the B.S. in Legal Studies, B.S. in Secondary Education Mathematics, B.S. in Secondary Education Biology, and the B.A. in Psychology. With additional external support, the B.A. in Communication may be offered in AY 2011-2012, followed by the B.A. in Biology and a B.S. in Nursing in AY 2012-2013. Master’s programs in Public Administration and Criminal Justice will be offered in AY 2011-2012 and AY 2012-2013 respectively, thereby completing a clearly articulated career pathway for Charlotte County residents from the K-12 system through graduate school.

If supported, implementation of the plan could dramatically, and in a cost-effective manner, increase the number of students (headcount) enrolled at the Charlotte County campus by roughly 100%, raising enrollment from its current level of 2,400 to possibly 5,000 by the year 2020. The increased number of graduates will lead to a better-educated population and attract a wider range of employers to the area. Moreover, the potential economic impact of such an expansion is conservatively estimated at roughly $95m in the next decade, which would more than justify the needed initial investment in additional resources.

It is widely known and appreciated that someone holding a baccalaureate degree will generate higher lifetime earnings than someone possessing only a high school diploma. Indeed, lifetime earnings tend to be about 75% greater for a college graduate than for a high school graduate; unemployment and poverty rates tend to be lower among college graduates; moreover, the impact on tax revenue is roughly double for a college graduate than for a high school graduate.

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1 The amount is based in part upon a potential capital need and associated expenditures and in part upon incremental recurring costs thereafter.
graduate. There can be little doubt that closing the gap in the percentage of the Charlotte County population possessing a bachelor’s degree is a critical factor in stimulating economic prosperity in the region. Of course, these impacts are magnified to an even greater extent when factoring in a master’s level of college preparation.

Beyond the purely financial impacts are the social benefits that accrue with a college education. As reported by the College Board (2005), these impacts include the following:

- higher levels of civic participation, including volunteer work, voting, and blood donation
- more positive perceptions of personal health
- lower incarceration rates
- lower smoking rates

By establishing a publicly supported comprehensive center for higher education in Charlotte County, ESC and FGCU will help secure the future economic and social prosperity of its residents and contribute to the state’s goals of economic diversification and enhanced educational attainment of its citizens. As with any new venture, its success is often tied to a high level of commitment and financial feasibility.

Currently, the Charlotte County campus is state-funded at a level of just over 1,100 full-time equivalent (FTE) students. The resource needs associated with the ESC and FGCU partnership to expand its comprehensive university programs to Charlotte County residents requires a base level of funding. For students to be successful, a foundation of courses for degree completion needs to be offered, a baseline of student services needs to be provided, and a constant level of support services is also required. To accomplish the necessary infrastructure to support the increased level of higher education within Charlotte County, a base funding model of 2,500 FTE needs to be provided. Funding will revert to the standard State FTE funding formula model once the combined FTE of FGCU and ESC reaches 2,500.

Each institution pledges its support to provide the academic, student services, and student life infrastructure in the most effective and cost-efficient manner. A Joint Programming Oversight Committee will supervise the implementation of the partnership. To ensure the success of this joint use partnership, a reasonable revenue stream must be identified to protect the integrity and continuity of offerings. Each institution can contribute tuition revenues and in kind services; however, a special appropriation from the State of Florida will also be necessary. Such funding is critical during the incubatory stages of this project. Legislative action is necessary to provide start-up funding until such time as growth reaches a self-sustaining level.
INTRODUCTION

With a strong commitment to enhancing the higher education alternatives in Charlotte County, an Exploratory Task Force conducted a feasibility study that addressed current and projected demographics, existing and proposed options for higher education in Charlotte County, potential programming, operational strategies, and budget implications. Using a five-to-ten year horizon, this study assesses the academic and political climate and seeks to provide a balanced approach to this initiative. The recommendations in this report are data driven and developed with a strong commitment to building upon the unique strengths of both institutions. This report includes:

♦ A description of existing and projected pathways between the two institutions, with a focus on demographic data specific to Charlotte County

♦ A review of joint student-service and facility-use needs

♦ Enrollment projections and budgetary analysis for the proposal

♦ A timeline and preliminary plans for implementation

Charlotte County Postsecondary Educational Need and Demand

Charlotte County, like most of Southwest Florida, is experiencing significant growth. In the first seven years of this decade, the population grew by over 12% and is anticipated to grow a further 7% in the next four years, at that point reaching about 170,000 people. While growth in the age category of 18 – 34 years (about 24,000 or 15% of the current population) will increase by 11% during the next five years, the current population is weighted more heavily toward older adults, with this demographic growing even more rapidly than others. Indeed, roughly 50%, about 75,000, are 55 years of age or older. While growth in traditional students (those in their teens) will continue for the next few years, the number of county public high school students is expected to peak this year at 1,388 and then slowly decline before stabilizing at about 1,200 in AY 2012-2013 (see Table 1, below).

Table 1. Projected Public High School Graduates Charlotte County 2008-2014

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<tbody>
<tr>
<td>High School Graduates</td>
<td>1,388</td>
<td>1,364</td>
<td>1,339</td>
<td>1,342</td>
<td>1,143</td>
<td>1,211</td>
<td>1,262</td>
<td>1,155</td>
</tr>
</tbody>
</table>

Source: Florida Department of Education
Currently, ESC and FGCU enroll about 50% of the public high school graduates pursuing higher education the following fall (see Table 2, below). It will be difficult for the two institutions to significantly improve on this in the near term without additional in-migration to the county.

**Table 2. Percentage of 2005-2006 Charlotte County Public High School Graduates Pursuing Post-Secondary Education**

<table>
<thead>
<tr>
<th>Educational Setting</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Edison State College</td>
<td>38%</td>
</tr>
<tr>
<td>Florida Gulf Coast University</td>
<td>10%</td>
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<tr>
<td>Division of Public Schools</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>48%</td>
</tr>
</tbody>
</table>

Sources: Florida Education and Training Placement Information Program; FGCU, Edison State College

In terms of educational attainment, Charlotte County lags the State of Florida and the nation in the percentage of its population possessing an associate, bachelor’s, or graduate degree. Notwithstanding, there will be increasing demands in the future for higher education: for those preparing to enter the workforce, those retraining or burnishing existing skills, and those nearing retirement. The Joint Use Facility planned by ESC and FGCU will provide a platform for addressing these varied educational needs.

The demand for higher education in Charlotte County is reflected in the number of currently enrolled students at ESC’s Charlotte Campus and at FGCU. ESC enrolled approximately 2,400 students at its Charlotte Campus in AY 2007-2008. Roughly one-third of these students were pursuing Associate in Science degrees among 25 different occupationally focused majors. Just over 50% of the students enrolled were pursuing a more liberal arts focused education as students enrolled for the Associate in Arts degree. In addition to these students, FGCU offered 17 upper-division baccalaureate degree courses with a total enrollment of 101 students, generating nearly 300 course registrations across a variety of programs including Elementary Education, Criminal Justice, and Legal Studies.

This alone, however, does not represent the complete demand among Charlotte County residents for higher learning at ESC and FGCU. FGCU enrolled an additional 380 (344 undergraduate and 36 graduate) students at its Fort Myers campus. Of these students, 85% were non-residential. Popular undergraduate majors for this cohort include Elementary Education, Management, Nursing, and Resort and Hospitality Management. At the graduate level, Social Work, Business Administration, Nursing, and Public Administration are popular majors.
There is also another pool of older adults who have earned associate degrees from ESC but for a number of reasons have chosen not to pursue further education leading to a bachelor’s degree. We believe a limiting factor for these individuals is inadequate local access to baccalaureate options. Currently, the number of such individuals who reside in Charlotte County has been estimated to be as high as 600 and is growing by 80-90 each year. ESC also enrolls another 575 Charlotte County students at its Lee County Campus. It is reasonable to anticipate that at least 20% of these individuals might be interested in pursuing opportunities at the proposed Joint Use Facility in Charlotte County.

According to a 2007 study of Charlotte County conducted by the Wadley-Donovan Group, in terms of the workforce within Charlotte County, there are pressing needs for elementary and secondary school teachers, registered nurses, entry-level management, computer specialists, and sales representatives. There is also a significant need for training programs, especially for healthcare professionals.

To diversify the local economy, it will be necessary to increase the percentage of those employed in knowledge-based occupational groups. This will allow Charlotte County to compete with the rest of Florida and the United States, which, as previously mentioned, it currently lags behind in this area. The Wadley-Donovan Report cites Claritas data showing Charlotte County several percentage points behind both Florida and the nation. Among these occupational groups are the following: education, legal, life science, financial, management, and social services. ESC and FGCU intend to address all of these areas at the proposed Joint Use Facility.

ESC and FGCU believe an incremental and measured approach to development of their offerings in Charlotte County is both warranted by the data and mandated by the current fiscal circumstances facing both institutions. Indeed, the Charlotte Sun recently reported that the facility in southern Sarasota County, shared by Manatee Community College and USF Sarasota-Manatee, has shown good incremental growth during the last four years: from 21 classes with 66 student enrollments in spring semester of 2004 to 36 classes being currently offered with roughly 400 student enrollments each semester.

To this end, our two institutions plan to leverage their contributions to maximize the efficient use of the state’s investment in the ESC Charlotte Campus by proposing a Joint Use Facility. Edison will continue to offer associate degree programs, bachelor’s degree programs, and professional development opportunities. These will be complemented by FGCU’s more extensive array of baccalaureate opportunities, select graduate programs, continuing education, and cultural programming. The two institutions envision an educational career pathway that will permit students to identify their educational future clearly from grade school through graduate school.
Educational Pathways through a Partnership between ESC and FGCU

ESC and FGCU seek to provide educational pathways for students in the Charlotte County region. The diagram below illustrates this collaborative effort, beginning with high school preparation for entry into ESC and continuation into baccalaureate and post-baccalaureate programs.
To further augment educational pathways in Charlotte County, ESC has submitted an application to establish Edison Collegiate High School (ECHS), a publicly funded charter school intended to serve students in grades nine through twelve. ECHS is projected to be a natural progression from the dual enrollment and accelerated college credit programs that have been offered in area high schools for years. The new school would provide additional opportunities for local students to earn college credits while completing high school graduation requirements in a small, highly-focused educational environment.

The purpose of ECHS will be to provide a quality academic experience for high school students seeking the challenge of high academic standards, rigorous curricula, and college-level study in a small, innovative high school setting. An honors-level curriculum is envisioned for all students, offering pre-collegiate and collegiate instruction. Through dual enrollment, students will have the opportunity to accelerate college attendance and potentially earn a college degree the same year that they graduate from high school. Individualized learning contracts and student success teams would document mastery of content knowledge and facilitate accelerated college completion. An overarching goal is that high school and college faculty will work toward a common progression of educational outcomes through the college level. ESC and FGCU staff would meet regularly with ECHS personnel to develop and implement the proposed rigorous and diverse curricular environment.

One of the best ways to make higher education accessible/affordable to Charlotte County residents is to reduce commuting distances to Fort Myers. Indeed, about 50% of all FGCU Charlotte County students take one or more courses involving a distance learning component. FGCU proposes to expand its presence on the ESC-Charlotte Campus by complementing courses offered in face-to-face classroom/laboratory settings with courses or parts of courses being offered through online formats. By so doing, students may find their need to travel to Fort Myers greatly reduced, saving both time and reducing commuting, which provides a financial incentive for students and reduces environmental impact.

**Near-Term Programming**

ESC and FGCU will work collaboratively to expand local access to higher education for Charlotte County residents. To complement the array of programs already offered by ESC, FGCU will incrementally increase the number of programs offered on the Charlotte Campus over the next five years. (FGCU will continue to offer its successful bachelor’s program in Elementary Education there.) Proposed programs, beginning in AY 2009-2010, include the B.A. in Special Education, B.A. in Early Childhood Education, B.S. in Elementary Education, and a B.A.S. in both Public Safety Management and in Supervision and Management. This will be followed in AY 2010-2011 by the B.S. in Legal Studies, B.S. in Secondary Education Mathematics, B.S. in Secondary Education Biology, and the B.A. in Psychology. With additional external support, the B.A. in Communication may be offered in AY 2011-2012, followed by the
B.A. in Biology and a B.S. in Nursing in AY 2012-2013. Master’s programs in Public Administration and Criminal Justice will be offered in AYs 2011-2012 and 2012-2013 respectively, thus completing a clearly articulated career pathway for Charlotte County residents from the K-12 system through graduate school.

Table 3. Time Graph of Program Implementation

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>2008-2009</th>
<th>2009-2010</th>
<th>2010-2011</th>
<th>2011-2012</th>
<th>2012-2013</th>
</tr>
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<tbody>
<tr>
<td>ESC</td>
<td>B.A. in Elementary Education*</td>
<td>B.A.S. in Public Safety Management**</td>
<td>B.S. in Elementary Education</td>
<td>B.S. in Nursing</td>
<td>B.S. in Nursing</td>
</tr>
<tr>
<td></td>
<td>B.A. in Special Education</td>
<td>B.A. in Supervision and Management**</td>
<td>B.S. in Secondary Education</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B.A. in Early Childhood Education</td>
<td>Mathematics and Biology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FGCU</td>
<td>B.A. in Elementary Education*</td>
<td>B.A. in Legal Studies</td>
<td>B.A. in Communication***</td>
<td>B.A. in Biology***</td>
<td>B.A. in Biology***</td>
</tr>
<tr>
<td></td>
<td>B.A. in Special Education</td>
<td>B.A. in Psychology</td>
<td>Master of Public Administration</td>
<td>M.S. in Criminal Justice</td>
<td></td>
</tr>
<tr>
<td></td>
<td>B.A. in Early Childhood Education</td>
<td></td>
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</tr>
</tbody>
</table>

* currently offered on the Charlotte Campus of ESC
** online and blended courses currently available to all ESC students
*** assuming state support or grant support

The Lifelong Learning Institute at ESC offers over 50 classes per term in addition to a distinguished lecture series, educational travel groups, and book clubs. The organization’s curriculum committee coordinates offerings with ESC’s academic leadership. FGCU will also build upon its current continuing education programs to meet the needs of older Charlotte County residents. For example, during the past year, FGCU-Charlotte’s Continuing Education offerings have experienced rapid growth. FGCU’s Renaissance Academy debuted in Charlotte County during the Spring 2008 term. The program offered 17 courses and had over 150 enrollees. During the next five years, the Renaissance Academy will eventually evolve into a 100-course program with anticipated enrollment reaching over 1,000 students per academic year. Regarding professional development activities, FGCU-Charlotte will focus on areas of need as identified by the December, 2007 Wadley-Donovan Labor Market Assessment. These courses will include continuing education units (CEUs) and other non-credit activities in the following targeted areas: English as a Second Language (ESL); healthcare-related occupations such as licensed practical nurses, registered nurses, medical assistants and lab personnel; foreign languages; and technology-related training and certifications.
Future Needs Assessment

This programming scheme represents an incremental approach over the next five years to the development of an ESC/FGCU collaboration in Charlotte County that will make use of a shared facility. As the economy improves and growth resumes, the two partners will conduct a comprehensive needs analysis to chart future growth of programming to serve the needs of Charlotte County; this analysis will also identify the knowledge, skills, and credentials needed for the current workforce and for businesses that Charlotte County would like to attract.

Resource Needs

In order to expand its comprehensive university programs to Charlotte County residents, the resource needs associated with the ESC and FGCU partnership requires a base level of funding. For students to be successful, a foundation of courses for degree completion needs to be offered, a baseline of student services needs to be provided, and a constant level of support services is required. To accomplish the necessary infrastructure to support the increased level of higher education within Charlotte County, a base funding model of 2,500 FTE needs to be provided. Upon the attainment of a combined 2,500 FTE of FGCU and ESC, funding will revert to the standard State FTE funding formula model.

Staffing

Faculty for the upper-division courses will be FGCU employees; however, ESC’s pool of adjuncts and full-time faculty could provide a resource from which to draw. Sharing staff where appropriate is encouraged; this partnership encourages FGCU to have access to the services available on the Charlotte Campus. Within a defined agreement, support services can be provided by the staff of ESC if needed. Such services could include library, tutorial, and registration, among others.

During the first year of the extended partnership, staff sharing will begin in the area of student recruitment and advising. This recruiter/advisor will be assimilated into the Edison Student Services Division and will represent the interests of both institutions with recruitment emphasis in two distinct areas: high school students and working adults.

Responsibilities for this staff person will include:

♦ Visiting local high schools and forging relationships
♦ Promoting the joint admissions agreement in Charlotte County
♦ Advising students on the educational pathways available from high school through baccalaureate completion and beyond
♦ Identifying unique 4-year scholarships for special populations
♦ Recruiting Associate Degree graduates from ESC and neighboring colleges
♦ Mentoring the ESC student cohort pre-admitted to FGCU
♦ Cultivating adult students by working with major Charlotte employers (offering Hybrid and Weekend Courses)
♦ Marketing the partnership with the support of each organization

Meetings will occur on a regular basis between the two organizations. The Joint Programming Oversight Committee will be convened as soon as the partnership is finalized to oversee implementation of the programs.

Marketing

A commitment to this partnership will be clearly demonstrated by both organizations. In addition to programs and staff, a coordinated message will be developed and communicated throughout the region. This will occur in many ways. Of critical importance is to get the word out in a consistent and collaborative manner with an emphasis on the unique identity of the partnership. The message will always reinforce access, quality, cost, and convenience.

Specific strategies for both organizations include:

♦ Strategically locating billboards around the Charlotte community and/or near I-75
♦ Creating a common brochure that builds on the identity and theme of the partnership
♦ Developing an e-mail campaign to current and future students
♦ Developing a direct mail program to parents of high school graduates
♦ Using scholarships as a means of attracting students and fostering goodwill in the community (e.g., jointly awarding leadership scholarships to young adults in the community)
♦ Sponsoring community competitions to attract students to the Charlotte Campus (e.g., a speech contest for communication majors, a College Bowl, etc.)
♦ Working with the local chamber to develop an insert for their newsletter

Facilities

The Joint Use Facility agreement will methodically expand during the next several years as enrollment and programs grow and mature. Initially, the partnership will start by identifying a block of classrooms available for FGCU’s exclusive use. In addition, FGCU may use other ESC classrooms based on availability. It will then evolve into a more comprehensive arrangement, with FGCU enjoying visible prominence on the Charlotte Campus in multiple phases.

The following table illustrates a planned expansion for FGCU facility use on the Charlotte Campus for the next ten years. It is understood that signage will be needed to identify these areas and the signage requirements will evolve as the partnership evolves.
FGCU’s need for instructional technology will be accommodated. Standard classrooms will have whiteboards, internet access, and the standard technology necessary to facilitate PowerPoint presentations and elmos.

Formalizing this partnership is critical on many fronts—for the community, for the students, and for both organizations. As for the organizations, the partnership should represent a formal commitment to facility expansion and avoid a spontaneous “plan as you go” strategy. This will enable both organizations to organize and cultivate their programs as they move through each phase of this plan. Although this is a proposed plan, it is suggested that a three-year rolling commitment be made, which will be reviewed annually by the Joint Programming Oversight Committee.

**Signage**

Visible and professional signage is important for several reasons: to establish FGCU’s presence; and to show partnership stability, focus, and permanency. However, signage can only be pursued once a firm commitment to this venture is formalized by both organizations and legislative funding is approved. Signage should include the following considerations:

- Erecting signage on the wing of the building dedicated to FGCU
- Modifying signage on Charlotte Campus main entrance brick marquis
- I-75 exposure signage
- Monument directional signage on campus with FGCU logo on slats
- Poster signage in the student services lobby
- Maintenance of beauty and functionality of current and future signage

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Focus</th>
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<tbody>
<tr>
<td>2008-2018</td>
<td>Facility Development</td>
</tr>
<tr>
<td>Year one (2008-09)</td>
<td>A block of classrooms with good exposure</td>
</tr>
<tr>
<td>Years two and three*</td>
<td>A wing of a building with good exposure</td>
</tr>
<tr>
<td>Years four and five*</td>
<td>Occupy an existing building from ESC</td>
</tr>
<tr>
<td>Year seven</td>
<td>Seek funding for an additional FGCU building on ESC’s Campus</td>
</tr>
<tr>
<td>Year ten and beyond</td>
<td>FGCU to consider full campus plans</td>
</tr>
</tbody>
</table>

* Edison may use/rent FGCU designated classrooms
Next Steps

The ESC/FGCU Collaborative Initiative is an important milestone in transforming the relationship between ESC and FGCU. The partnership represents the next step in what has been a longstanding commitment to providing Charlotte County with enhanced opportunities for postsecondary instruction at the baccalaureate and master’s degree levels. The proposed cooperation will progress through a series of reciprocal steps that will build on each other. It will include expanded engagement on strategies for developing new postsecondary opportunities at the baccalaureate level and above, ways to enhance cooperation in program development, and steps to create the appropriate environment for successful student services initiatives in support of new programming. In order to enhance our effectiveness, relevant procedures for student advising, marketing, and recruiting will be strengthened, and measures to increase cooperation in these areas will be employed.

The leadership of both ESC and FGCU would appreciate any insights, suggestions, or solutions from community members or other interested stakeholders that would further our ability to positively respond to the needs of our community. During the next two months, both institutions will develop a comprehensive plan to garner community support and request funding from the legislature for this joint venture. By expanding university services to the ESC Charlotte County campus, students would truly be given greater access to the public baccalaureate opportunities available in Southwest Florida.