

ENVIRONMENTAL SCAN

Moraine Park Technical College
2016/2017



in partnership with



Fond du Lac County Economic
Development Corporation

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EXECUTIVE SUMMARY

Dodge County

Dodge County shows the greatest difference in gender than any other MPTC District county. Dodge has had a **53% male** and **47% female** population from 2010 to 2015, while the other counties have either 50% males and females (Green Lake and Washington County) or 49% male and 51% female (Fond du Lac County).

Dodge County is the only MPTC District county to have a **higher unemployment rate for veterans** than non-veterans and an increase in veteran unemployment.

Green Lake County

Green Lake County has continuously had the **highest unemployment rate** (U-3) across all MPTC District counties from 2011 to 2015. Take note of the county's small population as it will have a greater impact on the unemployment rate.

MPTC serves the least students from Green Lake County. Since the 2011-2012 academic year where they served about 800 students, the number of students served have **dropped by about 150 students**. In the past 2015-2016 academic year, they served just under 650 students. Again, a small population can affect these numbers.

Green Lake County's highest level of education attained peaks at **High School graduate or GED** with over 40%, showing potential for MPTC to attain these students as direct enrollee's to a MPTC program. Green Lake County shows least percent who attain an Associates Degree than all other MPTC District counties. Green Lake County falls below Wisconsin, but does have a greater percent than the United States.

Green Lake County spends an average of less than \$1,000 on education, specifically **\$943**. Wisconsin averages at \$1,267.

All MPTC District Counties

Top nonemployer (self-employment) industries by number of establishments include: construction, retail trade, real estate/rental/leasing, professional/scientific/technical services, and other. **Retail trade** is the only top industry showing increased number of establishments in all counties from 2011 to 2014.

Top industry: **Manufacturing**

Top occupation: **Production Occupation**

MPTC District counties averaged a percent **decrease** in unemployment (U-3) of **3.1%** from 2011 to 2015.

MPTC District counties, as well as Wisconsin, have a **lower poverty rate** than the United States from 2010 to 2014. Dodge, Fond du Lac, and Washington county have all been continuously lower than Wisconsin's poverty rate, with Washington being the lowest. Green Lake county has had a lower poverty rate than Wisconsin every year (from 2010 to 2014), with the exception of 2013.

The most common race or ethnicity in the four counties is **white**. The second most common across all four counties, though not nearly as predominant, is **Hispanic or Latino**.

Majority of veterans in the MPTC District counties are **high school graduates/have a GED or have some college experience/have an associate's degree**.

The age of students is dropping. During the 2012-2013 academic year, non program students averaged at age **37** while program students averaged age **30**. In the previous 2015-2016 academic year, non program students average age dropped to **36** and program students dropped to **28**.

MPTC District is seeing a **decrease in program graduates** from 2011 to 2016, much like 8 other Wisconsin tech colleges. Little change can be seen in direct high school enrollment from the 2012, 2013, and 2014 high school graduates, 1 and 2 years post graduation.

Associate's degree and a **Bachelor's degree** as their highest level of education compared with other MPTC District counties, Wisconsin, and the United States.

MPTC District counties spend less on education than Wisconsin's average as a whole, with the exception of Washington County. In addition, Washington County has the greatest expected **growth in medium household income** from 2016 to 2021, with a growth rate of 16%. Wisconsin is expected to growth at a rate of 11%.

Fond du Lac County

Fond du Lac County is the only county in the MPTC district where the number of individuals **employed and living in the county** outnumber those living in the county and commuting outside the county as well as those living outside the county but are employed in the county. As a result, this county has the **shortest average drive time to work**.

MPTC serves the most students from Fond du Lac County. This may be a result of their main campus being located in the county.

Washington County

Washington County has the **highest median household income** compared to the other MPTC District counties, Wisconsin, and the United States. Washington county also has the largest population compared to all other MPTC District counties, which may affect the median.

By count of veterans, Washington County has the most compared to all other MPTC District counties in 2015. By percent of population, Washington has the **least veterans** with 6% compared to the 7% in all other MPTC district counties.

Washington County shows a greater percent of students attaining an

EXECUTIVE SUMMARY

Commuting Patterns

Other than Fond du Lac County, the majority of residents that live in the other three district counties commute roughly 22-26 minutes outside of their county for various reasons such as a career opportunity. Although these residents are putting their dollars in the local housing market or area restaurants, businesses could be losing local talent to outside employers. Due to the availability and willingness to commute to a job that suits one's need, employers may find it difficult to hire qualified workers. It is important for employers to increase their search to find talent and remain competitive in the job market.

Top Industries/Occupations

Manufacturing continues to be the top industry in MPTC's district. MPTC should continue to build relationships with like employers. By aligning MPTC's programs with the needs of area manufacturing employers and establishing employer-student relationships, graduates may find themselves embarking on in-district career endeavors, which in turn would fuel the local economy.

Nonemployer

There continues to be an increase in nonemployer businesses, more commonly known as self-employment. MPTC may want to increase their efforts on advertising their Entrepreneurship certificate, as these businesses may be seeking skill sets that align with construction or real estate, rental, and leasing, or retail trade, which are growing industries among these businesses. In addition, these specific businesses should reach out to area organizations like Fond du Lac County Economic Development Corporation (FCEDC) to aid in local recruitment efforts to address their services.

Degrees/Diplomas

There has been a decrease in the number of degrees/diplomas awarded when comparing 2011-2012 to the 2015-2016 academic year. MPTC has witnessed many students starting a program by taking a few classes and then choosing to leave the program for employment (jobbing-out). Due to this, MPTC continues to build within their program curriculum by incorporating career pathway certificates, so that students who "job-out" have the opportunity to earn a credential without having to graduate. Based off this trend, MPTC should continue the expansion of these certificates that meet employer demands. With versatile credentialing, MPTC may see an increase in enrollment and FTE.

Unemployment Rate

There has been a consistent trend that when unemployment rates increase, higher education enrollment increases as well as more people out of work go back to school to increase their education or skill set. Contrary, current unemployment rates are down; therefore, enrollment has declined since more people are back in the workforce. MPTC should continue to focus on this as an opportunity to increase various training opportunities with area businesses.

Education Hot Topics

Associate's degrees are expected to increase by 39% from 2011-12 to 2023-24. Aligning curriculum to meet market demands will be essential when building upon existing or new programs at MPTC. Continued exploration into the labor market will be essential for this process.

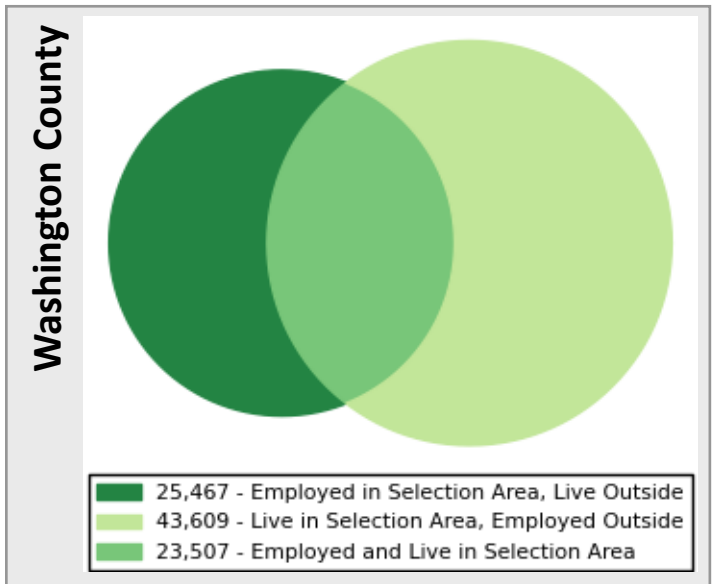
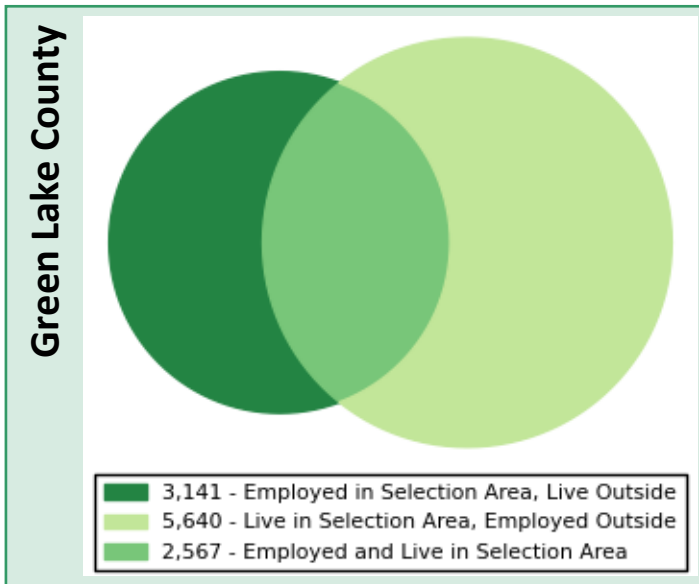
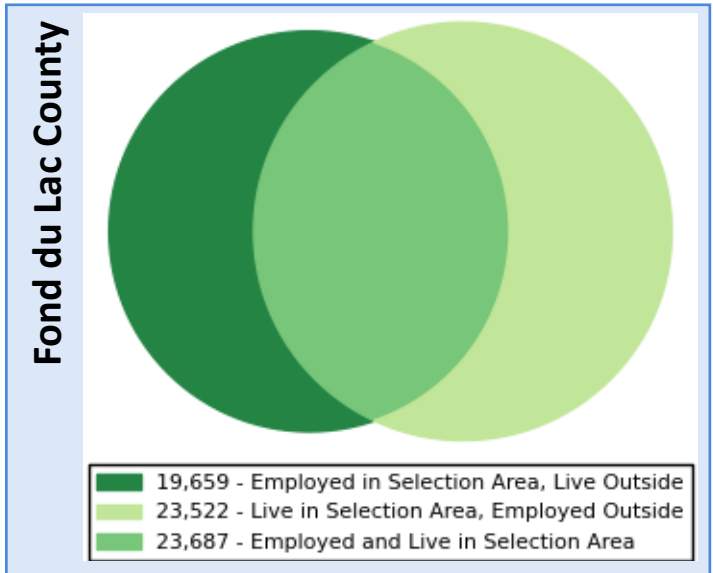
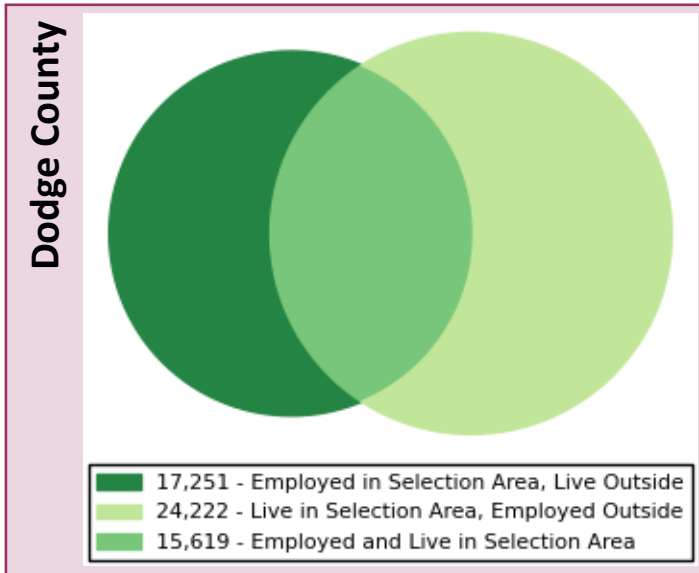
Due to the rise in tuition costs, student loan debt continues to increase and has exceeded both mortgage and credit card debit in the U.S. As many graduates scramble to pay back their debt, many falling delinquent, consumer spending may decrease and additional restrictions may be placed on taking out future student loans for those wanting to go to college. Effects of increasing student loan debt can also spiral down to these graduates not being able to contribute to the housing market as many graduates may find themselves moving back in with their parents or renting. The Technical College system remains less costly compared to 4-year institutions. While MPTC recruits students, they should be addressing the rising cost of education and what it means to come to an affordable school. Even if it is for general education classes that have the ability to transfer on to a 4-year institution, students should have a realistic understanding of what life may look like after one graduates with burdensome debt, but also considering the necessary costs to live with mortgage/rent and vehicle payments, groceries, etc.

Across the nation, high school enrollment projections are increasing with minority populations, specifically enrolling more Hispanic and Asian/Pacific Islanders compared to White students. Due to this shift, higher education may want to target these minority groups when it comes to recruitment efforts.

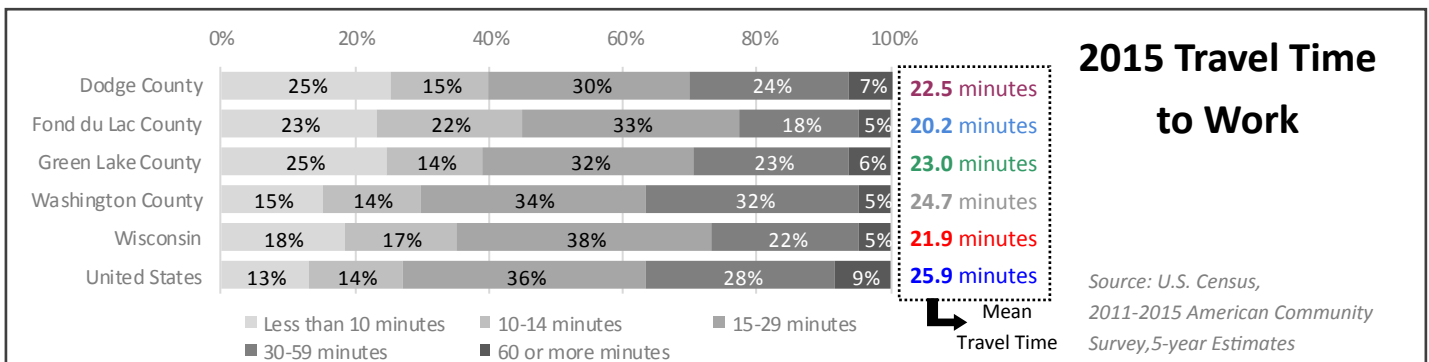
COMMUTING PATTERNS

Bubble size used for representation purposes to compare inflow and outflow of county in 2014.

Example: More Dodge County residents live in Dodge County and work outside of Dodge County compared to residents who live and work in Dodge County.

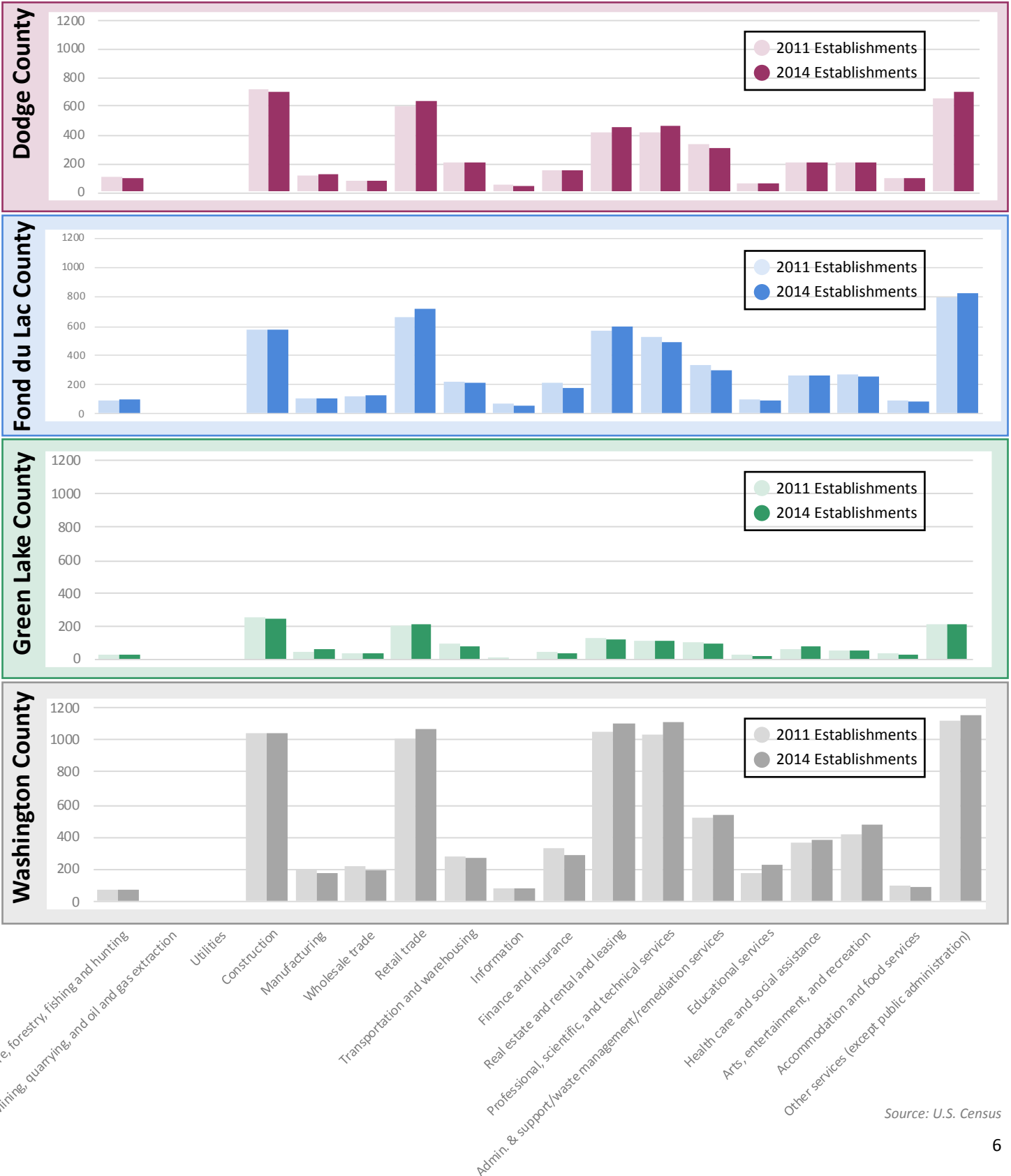


Source: US Census, On the Map: 2014 Primary Jobs (Primary jobs include public and private jobs. The primary job is the highest paying job for an individual worker.)



INDUSTRY: Nonemployer

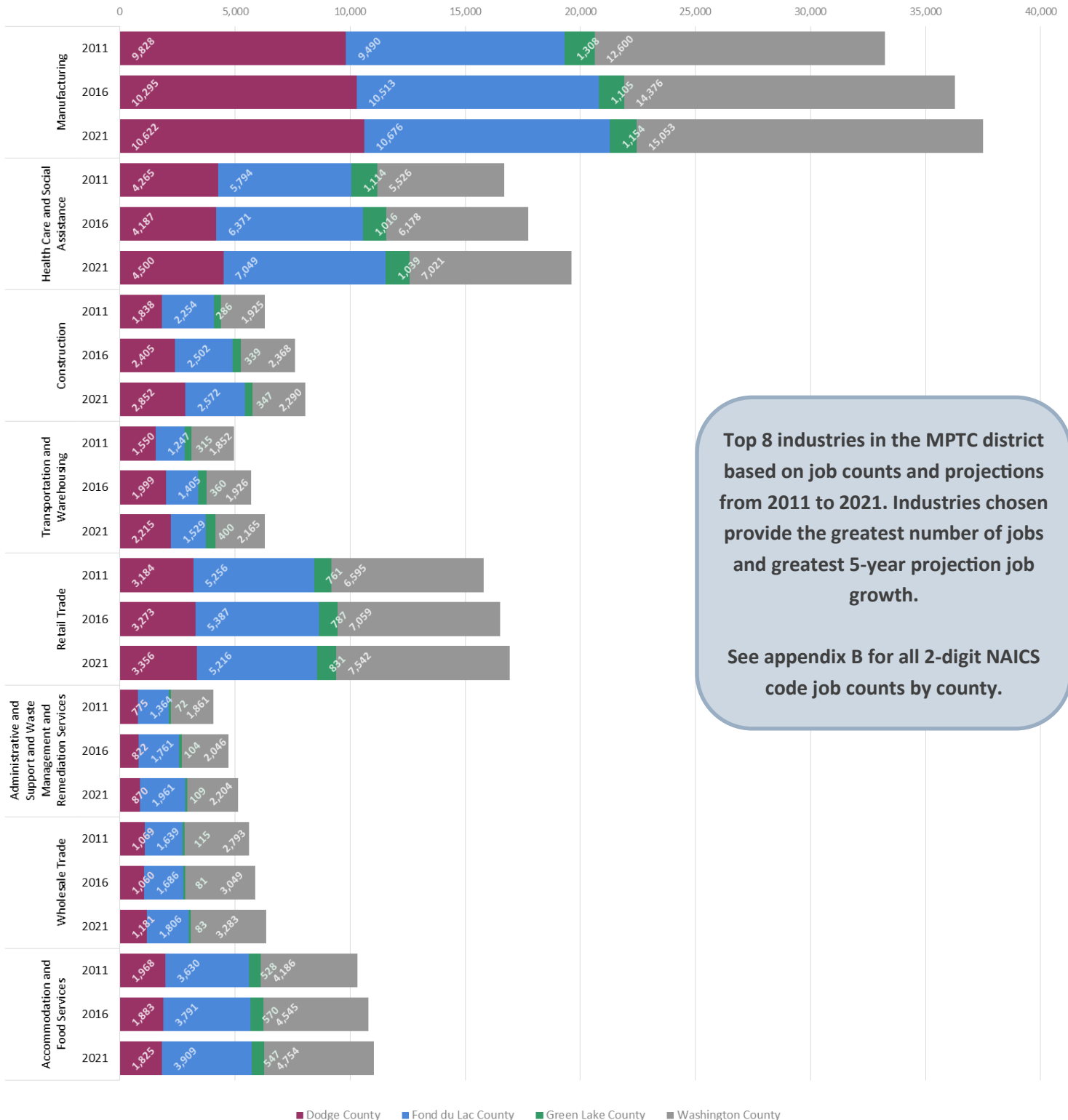
Nonemployer — A nonemployer business is one that has no paid employees, has annual business receipts of \$1,000 or more (\$1 or more in the Construction industry), and is subject to federal income taxes. More commonly known as self-employed or a sole proprietorship.



Source: U.S. Census

INDUSTRY: Top 8 industries

All MPTC District Counties Job Count



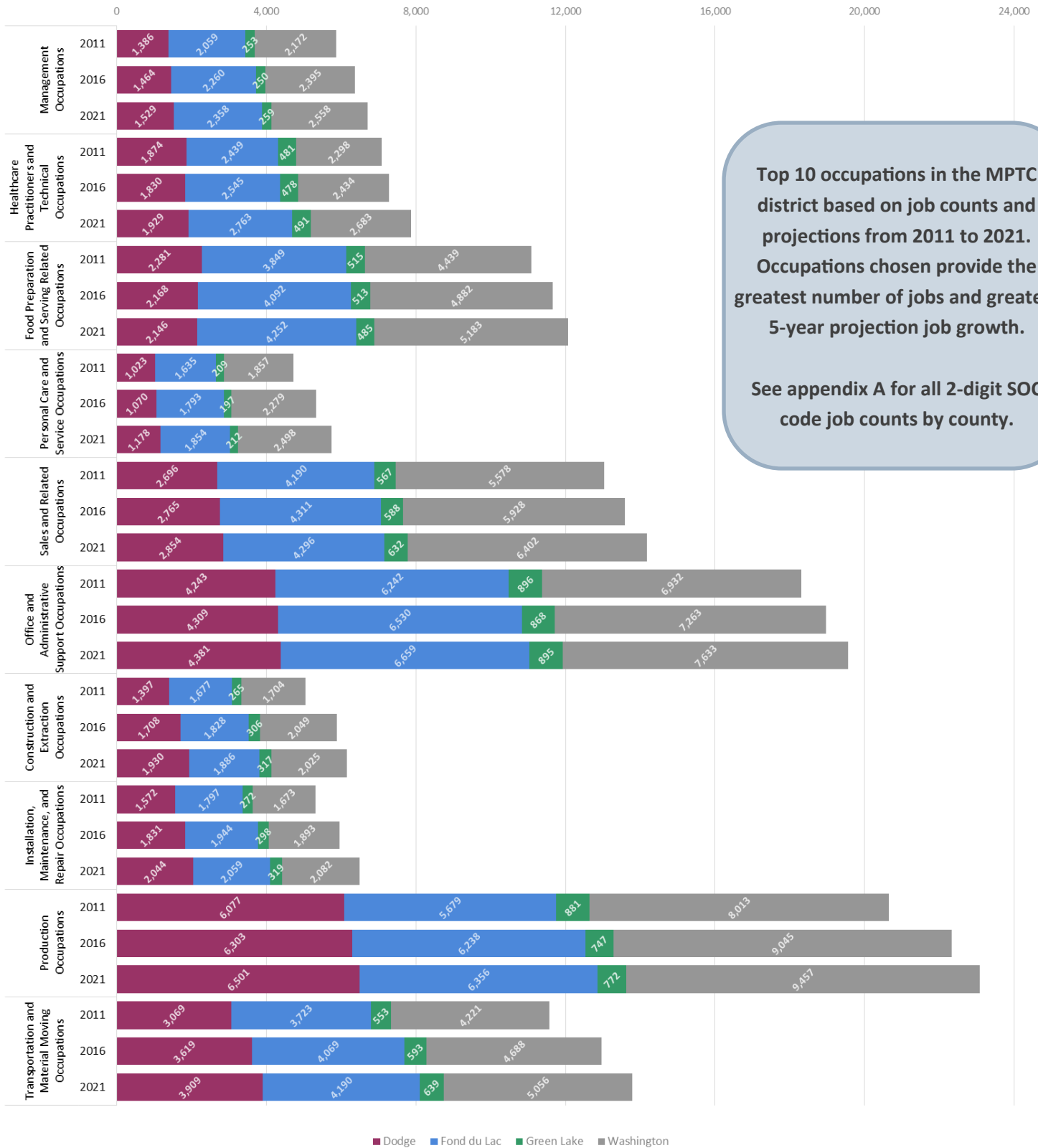
Top 8 industries in the MPTC district based on job counts and projections from 2011 to 2021. Industries chosen provide the greatest number of jobs and greatest 5-year projection job growth.

See appendix B for all 2-digit NAICS code job counts by county.

Source: EMSI (only QCEW Employees included. Is a virtual census of nonagricultural employees and wages. About 47% of all workers in agricultural industries are covered. Jobs that are exempt or not covered by Unemployment Insurance Law are not included. Suppressions have been removed by EMSI. NAICS codes are numbers to better organize and classify industries.

WORKFORCE: Top 10 occupations

All MPTC District Counties Job Count



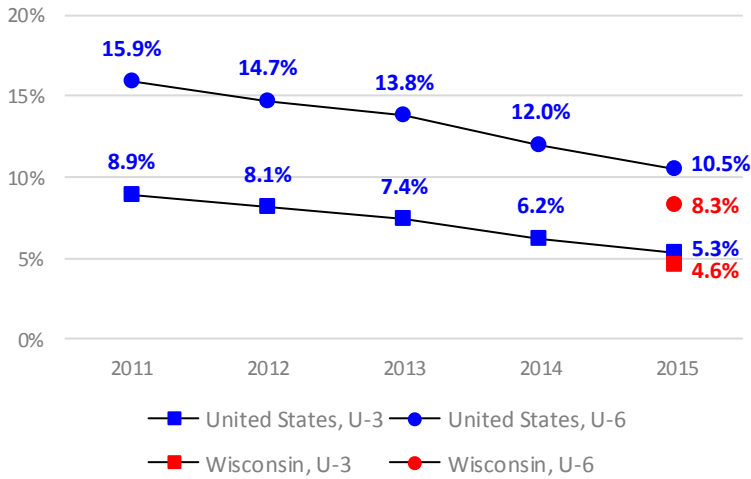
Top 10 occupations in the MPTC district based on job counts and projections from 2011 to 2021. Occupations chosen provide the greatest number of jobs and greatest 5-year projection job growth.

See appendix A for all 2-digit SOC code job counts by county.

Source: EMSI (only QCEW Employees included. Is a virtual census of nonagricultural employees and wages. About 47% of all workers in agricultural industries are covered. Jobs that are exempt or not covered by Unemployment Insurance Law are not included. Suppressions have been removed by EMSI. SOC codes are numbers to better organize and classify occupations.

WORKFORCE: Unemployment

Average Annual Unemployment Rates



U-3: The official unemployment rate for Wisconsin falls below the national average of 5.3%, a difference of 0.7%.

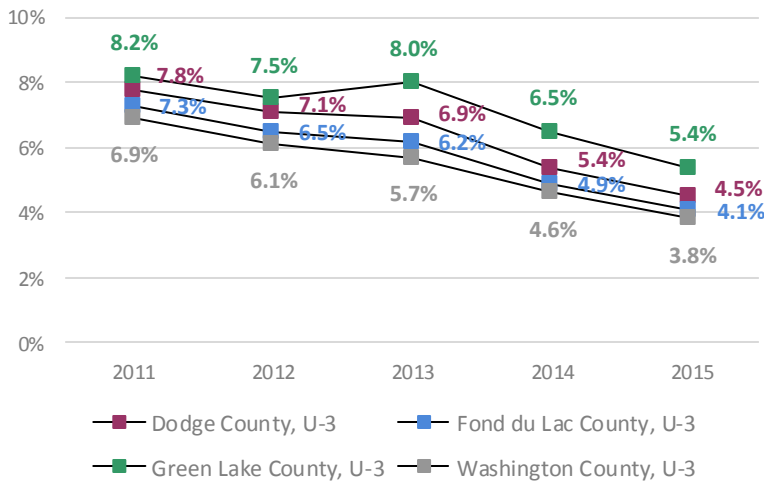
U-6: The percent of underemployed individuals in Wisconsin is also lower than the national average. While more individuals are categorized as underemployed than unemployed, Wisconsin still falls below the national average, by almost 2%.

Overall, national unemployment and underemployment rates are decreasing.

See U-3 (unemployment) and U-6 (underemployment) definitions below. Seasonally adjusted.

Note: Change in scale

Average Annual Unemployment Rates



Green Lake County has averaged higher than the remaining MPTC district counties in unemployment consistently since 2011.

Dodge County has the second highest unemployment rate, followed by Fond du Lac and Washington County.

Fond du Lac and Washington County unemployment rates differed by 0.5% or less over the past 5 years.

See U-3 (unemployment) definitions below. Not seasonally adjusted.

Measures of Labor Utilization, Seasonally Adjusted

Source: Bureau of Labor Statistics

U-3 Total unemployed, as a percent of the civilian labor force (**official unemployment rate**)

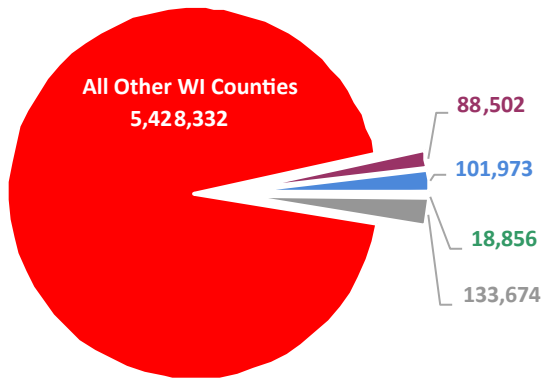
U-6 Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force

NOTE: Persons marginally attached to the labor force are those who currently are neither working nor looking for work but indicate that they want and are available for a job and have looked for work sometime in the past 12 months. Discouraged workers, a subset of the marginally attached, have given a job-market related reason for not currently looking for work. Persons employed part time for economic reasons are those who want and are available for full-time work but have had to settle for a part-time schedule.

NOTE: Averages were calculated with the sum of seasonally adjusted monthly rates, divided by 12.

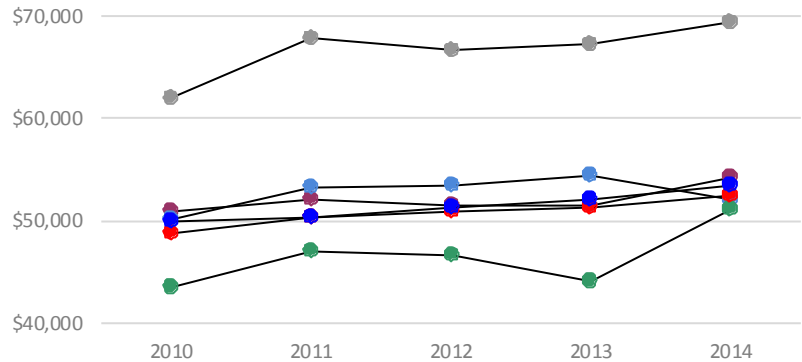
WAGES & INCOME

2015 Wisconsin Population



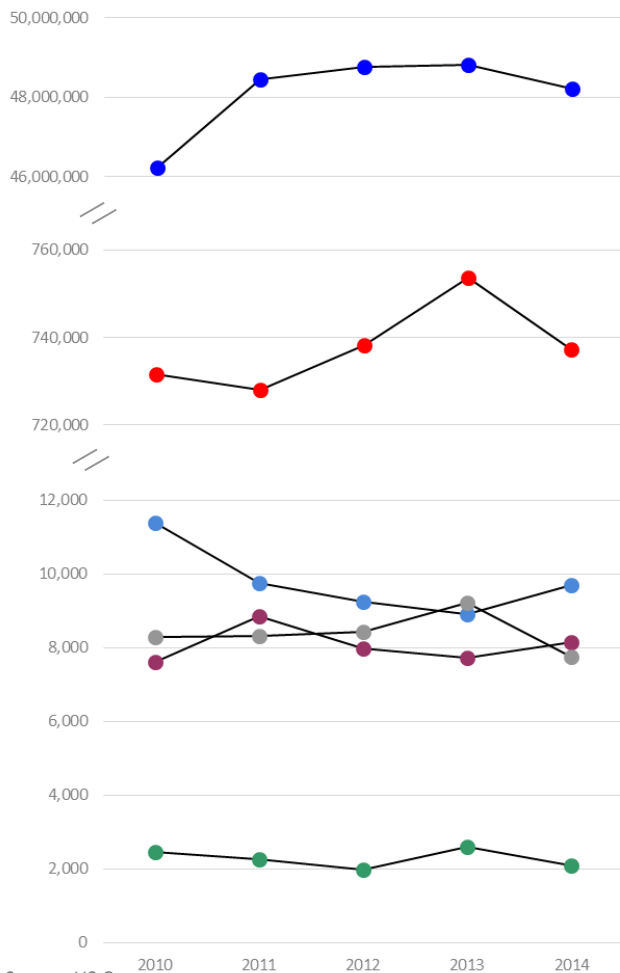
Source: Bureau of Economic Analysis

Median Household Income



Source: US Census

Poverty Count, All Ages

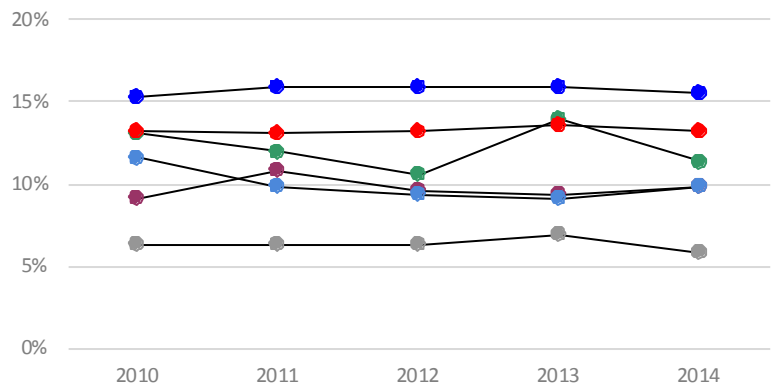


Source: US Census

The poverty count graph to the right includes all MPTC District counties as well as Wisconsin and the United States. To incorporate all counts in the graph, the scales were altered.

The scale changes where you see // and the distance between axis lines also changes.

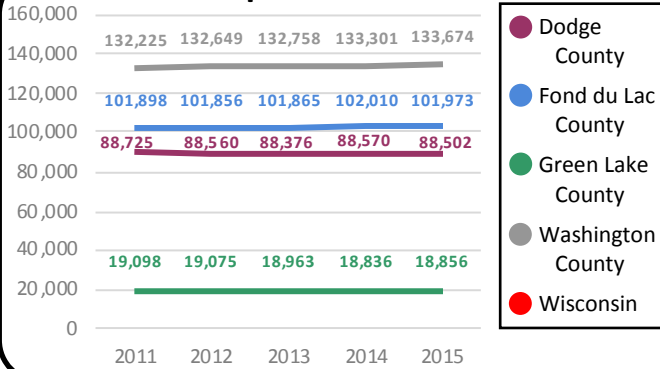
Percent in Poverty, All Ages



Source: US Census

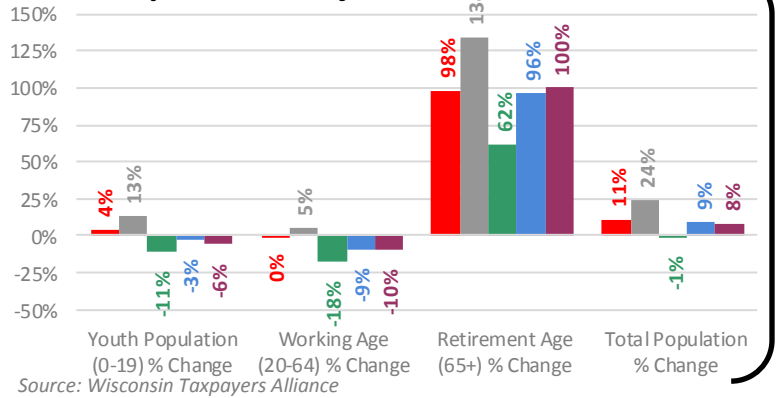
MPTC DISTRICT PROFILE

Population



Source: 2010 US Census, Population Division

Population Projections (2010-2040)



Source: Wisconsin Taxpayers Alliance

Gender

County	% Male	% Female	Change since 2011
Dodge County	53%	47%	Counties saw little to no change in percent of each gender from 2011 to 2015
Fond du Lac County	49%	51%	
Green Lake County	50%	50%	
Washington County	50%	50%	

Age

County	Median Age in 2015	Change in Age since 2011 (in years)
Dodge County	42.2	↑ 1.0
Fond du Lac County	41.4	↑ 0.8
Green Lake County	45.7	↑ 0.8
Washington County	42.8	↑ 1.4

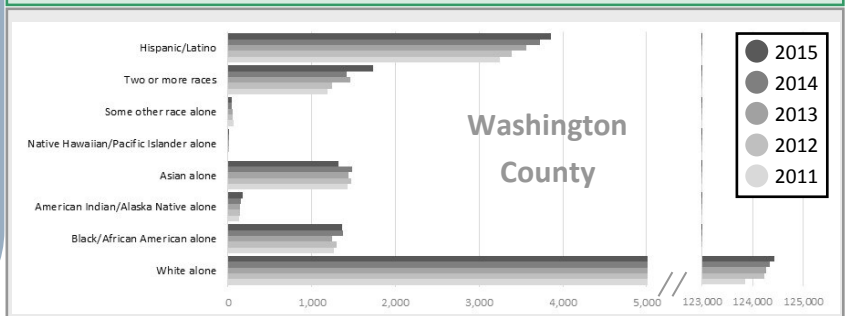
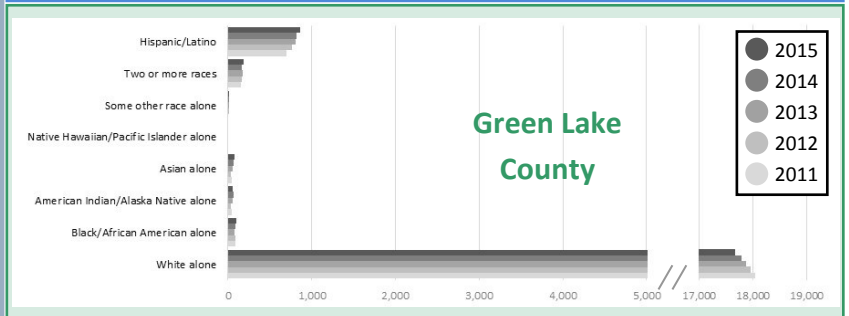
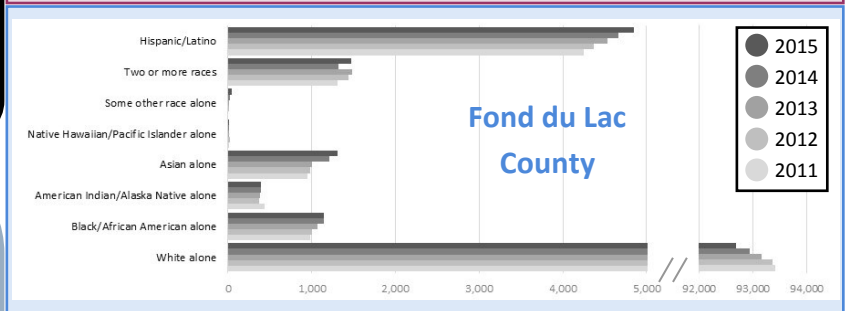
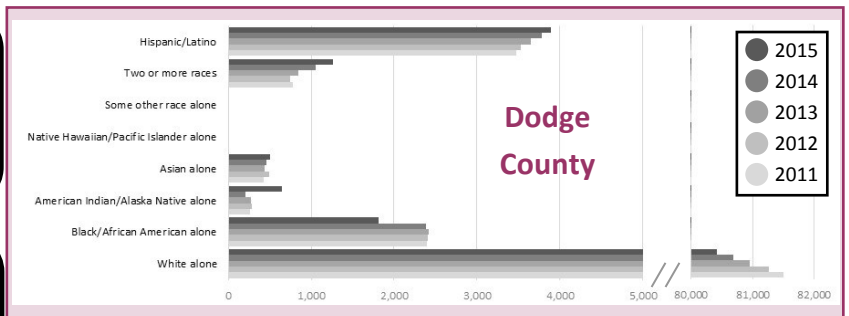
Race & Ethnicity

Race and ethnicity are represented in the same graph, by county.

If an individual DOES identify as Hispanic or Latino, they are represented in the "Hispanic/Latino" bar and their race will not be represented.

If an individual DOES NOT identify themselves as Hispanic or Latino, their race is represented in the graph.

NOTE: Due to the large number of white individuals in the four counties, all four graphs have a break in the axis at 5,000. The graph continues at whichever point necessary to represent the number of white individuals in the county. The axis of the second half of the graph is NOT the same for any county.



Source: U.S. Census, 2007-2011 American Community Survey

MPTC DISTRICT VETERAN PROFILE

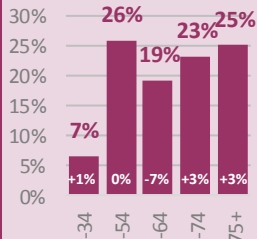
Dodge County

2015 Veteran Population

6,286 7%

% decrease as of 2011: 12%

Veterans Age

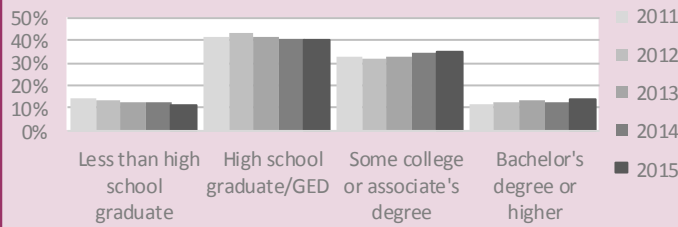


Percent at base of chart indicates 2011 vs 2015 changes.

Unemployment Rate

	2015 Rate	% change since 2011
Veteran	9.4%	↑ 2.1%
Non-Veteran	5.5%	↓ 1.6%

Veteran Educational Attainment



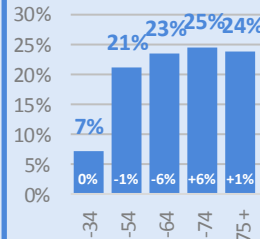
Fond du Lac County

2015 Veteran Population

7,161 7%

% decrease as of 2011: 14%

Veterans Age

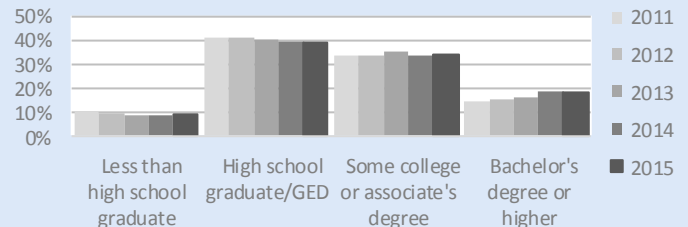


Percent at base of chart indicates 2011 vs 2015 changes.

Unemployment Rate

	2015 Rate	% change since 2011
Veteran	2.7%	↓ 2.3%
Non-Veteran	5.4%	↓ 1.2%

Veteran Educational Attainment



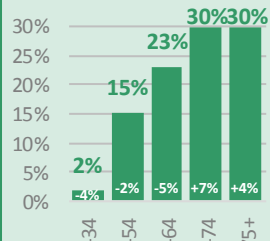
Green Lake County

2015 Veteran Population

1,362 7%

% decrease as of 2011: 20%

Veterans Age

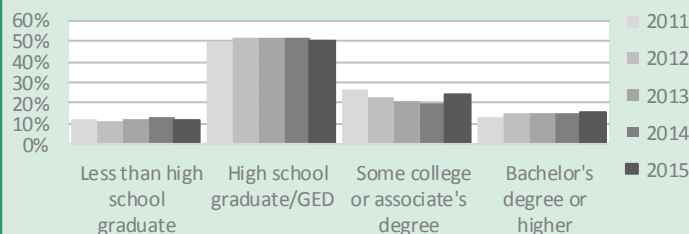


Percent at base of chart indicates 2011 vs 2015 changes.

Unemployment Rate

	2015 Rate	% change since 2011
Veteran	4.2%	↓ 3.5%
Non-Veteran	5.7%	↑ 0.7%

Veteran Educational Attainment



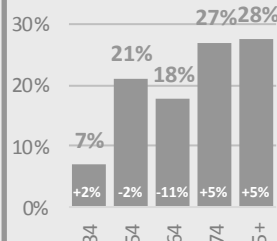
Washington County

2015 Veteran Population

8,485 6%

% decrease as of 2011: 7%

Veterans Age

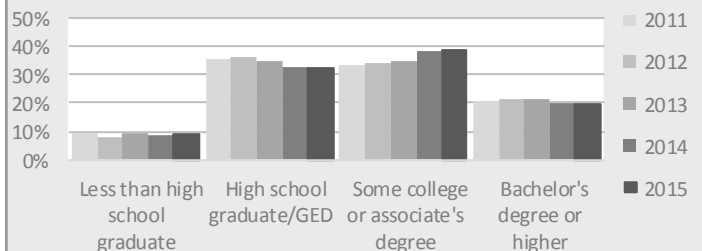


Percent at base of chart indicates 2011 vs 2015 changes.

Unemployment Rate

	2015 Rate	% change since 2011
Veteran	2.9%	↓ 2.5%
Non-Veteran	4.1%	↓ 1.3%

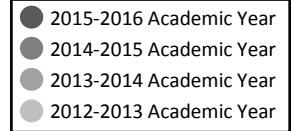
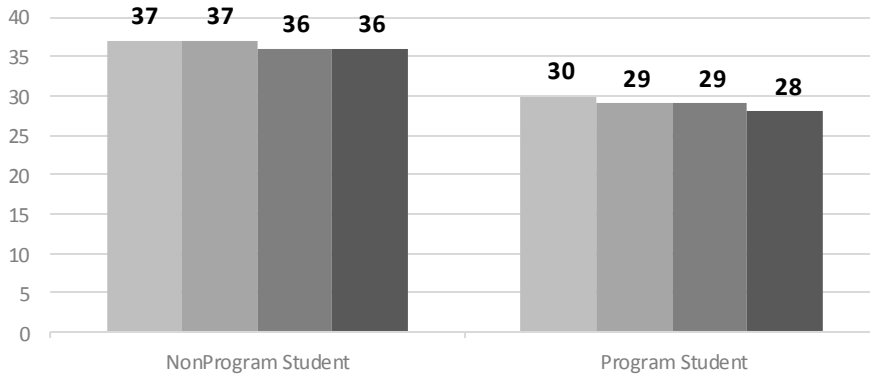
Veteran Educational Attainment



Source: U.S. Census, 2007-2011 American Community Survey
 Veteran data includes only veterans ages 18 and older.

MPTC STUDENT PROFILE

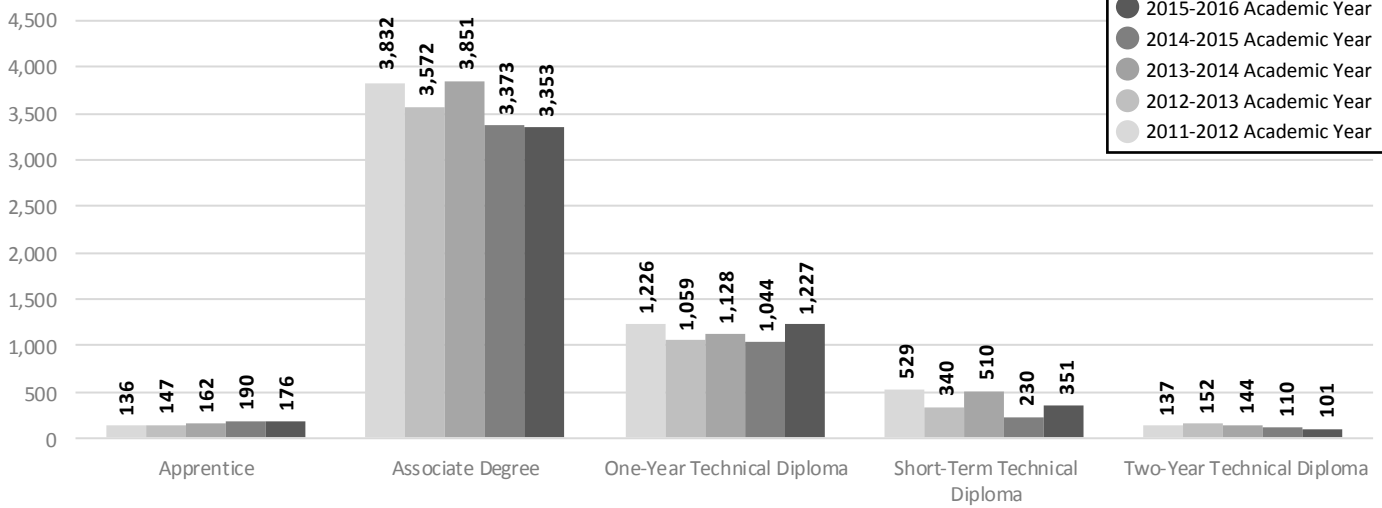
Average Age Program Student vs. NonProgram Student



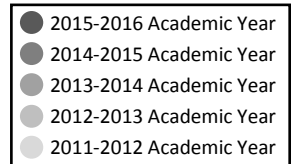
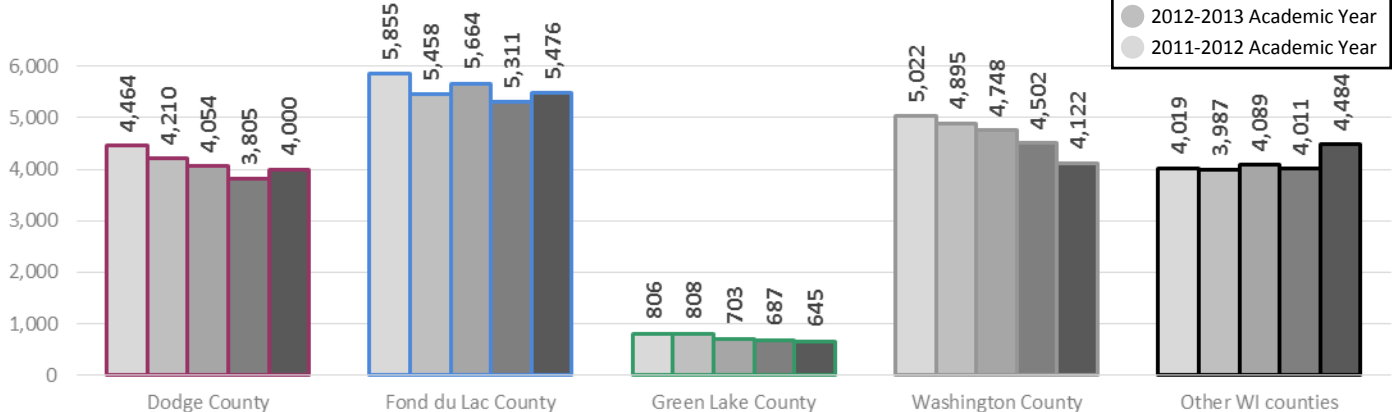
Age of both program and non-program students is steadily decreasing.

Non-program students tend to be older than program students.

Number of MPTC Degrees/Diplomas Awarded



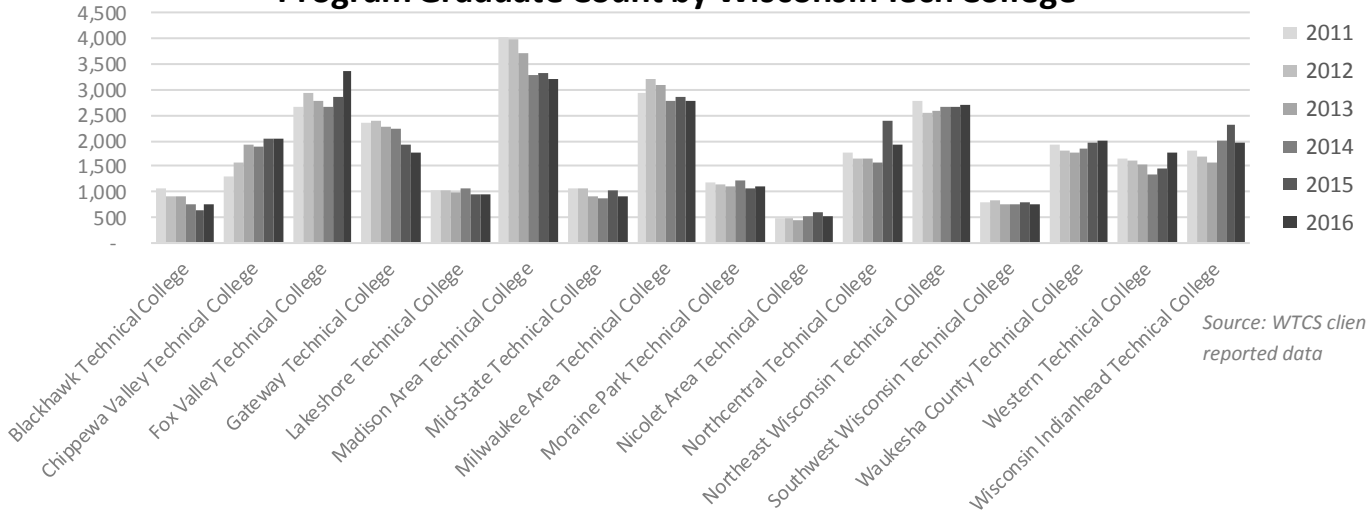
MPTC Students Served by County of Residence



Source: WTCS client reported data

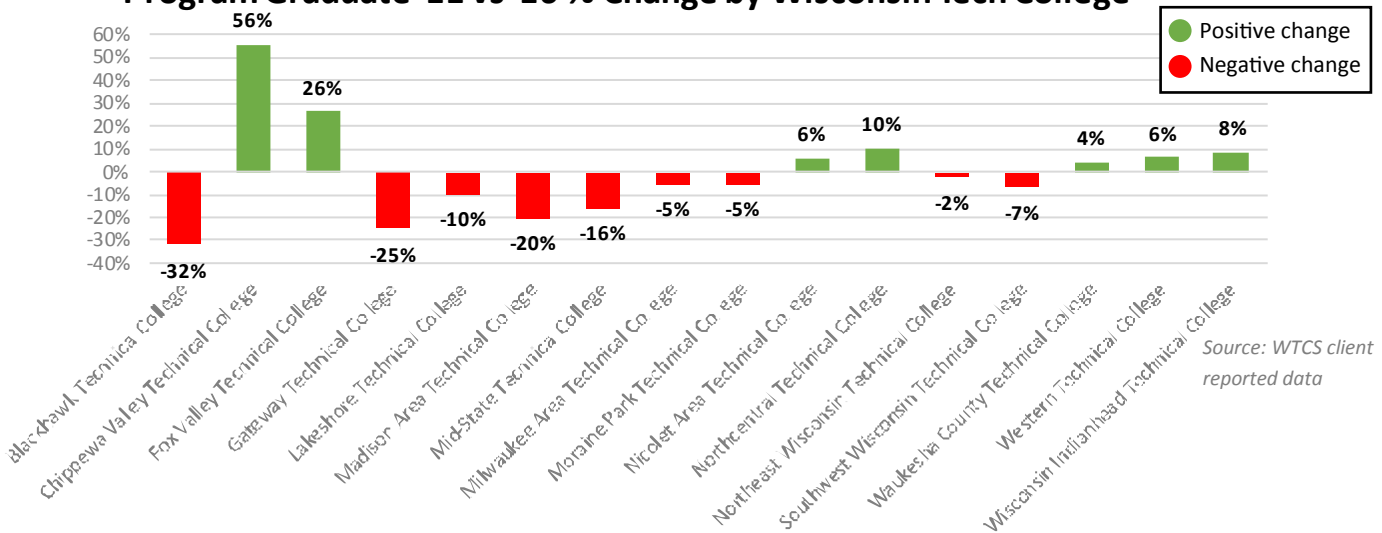
EDUCATIONAL ATTAINMENT

Program Graduate Count by Wisconsin Tech College



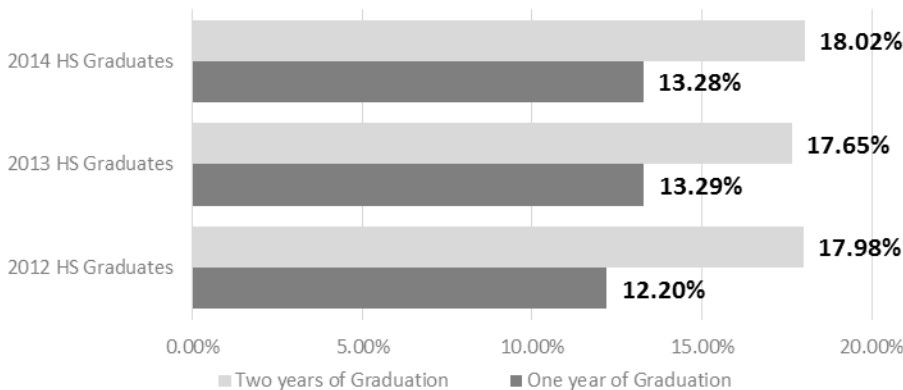
Source: WTCS client reported data

Program Graduate '11 vs '16 % Change by Wisconsin Tech College



Source: WTCS client reported data

Direct Enrollment to MPTC

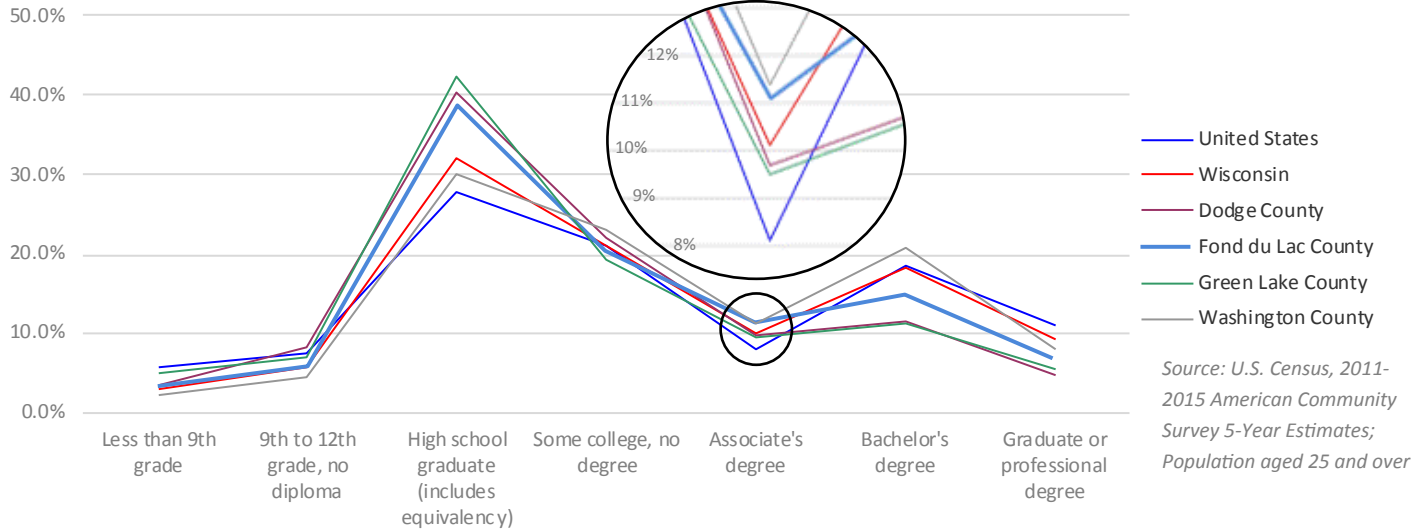


What is direct enrollment? Direct enrollment to MPTC includes enrollment in an FTE generating course in the year following high school graduation or enrolling two years after high school graduation.

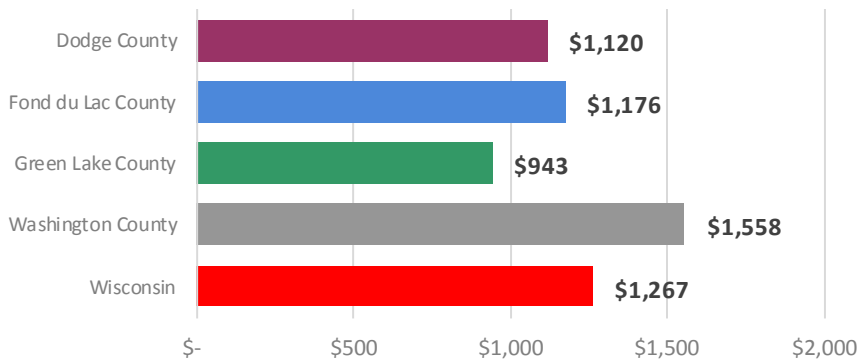
Source: WTCS client reported data

SPENDING ON EDUCATION

2015 Highest Level of Education Attained

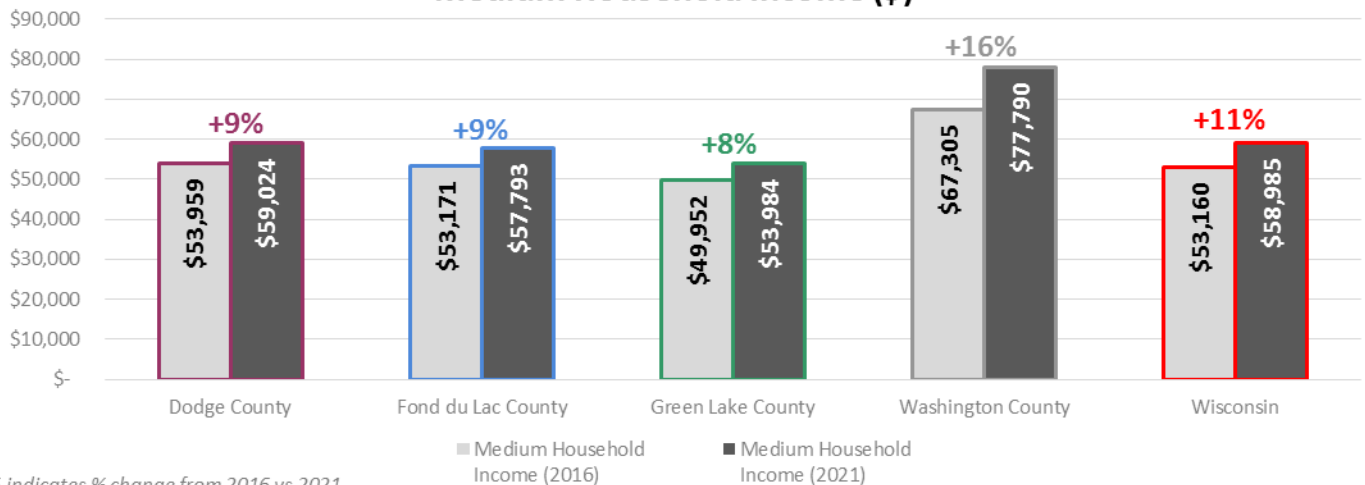


Education Average Spent (\$)



Education consumer spending includes costs associated with college tuition including technical colleges, school books and supplies from elementary to college, test preparations, and tutoring. The expenses are spread over all households in a geographical area. Some households don't have any expenses while others have high expenses if paying for college.

Medium Household Income (\$)




*% indicates % change from 2016 vs 2021

Source: Esri forecasts for 2016 and 2021; Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics.

EDUCATION HOT TOPICS

ITT Technical Institute  Effective September 2016, all 136 ITT Tech campuses closed after 50 years of service across the nation. The closure led to more than 8,000 employees losing their jobs as well as affecting hundreds of thousands of students. There was an extensive investigation done where ITT Tech accepted billions of dollars in government aid (both grants and loans) while not providing adequate information to students when it came to job training and the financial responsibility of the loans taken out by their students. *Source: GIZMODO; US Department of Education*

 **GLOBE UNIVERSITY** After a court ruling, Minnesota's Globe University and the Minnesota School of Business closed due to fraudulent marketing and recruiting efforts, specifically regarding their Criminal Justice Program. Globe University misrepresented the employability of the program's graduates. Graduates were pursuing law-enforcement careers (e.g., Minnesota police officers), which they did not qualify for due to their degrees from Globe. In addition, Globe misrepresented the transferability of the university's credits to current and prospective students. *Source: Minneapolis/St. Paul Business Journal; US Department of Education*



Social Media has been growing over the last decade and more and more organizations are utilizing various apps to market their products. Locally, the University of Wisconsin – Green Bay used the popular app, Snapchat, to notify their newly admitted students on their acceptance to the university before they even received their acceptance letter by mail. *Source: WBAY, Green Bay, WI*



Western Interstate Commission for Higher Education (WICHE) projects that the country will have fewer students in our K-12 system; therefore, producing less graduates. In addition, the decline in high school students could affect a decline in college enrollment, which would lead to those available for the work force. According to WICHE, they are projecting that more Hispanic and Asian/Pacific Islanders, specifically in the South, will surpass the number of White students as the demographic backgrounds continue to change across the country. Knowing the change in demographic make-up, colleges and universities should embrace the new student population when recruiting. *Source: Western Interstate Commission for Higher Education*

Associate's degrees

The total number of associate's degrees

- ▲ increased 80 percent between 1998–99 and 2011–12; and
- ▲ is projected to increase 39 percent between 2011–12 and 2023–24.

The number of associate's degrees awarded to men

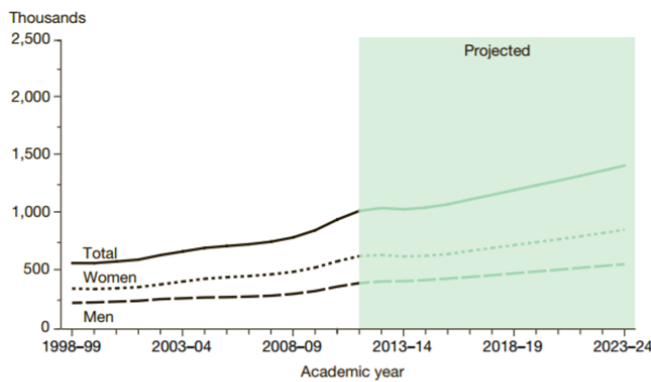
- ▲ increased 78 percent between 1998–99 and 2011–12; and
- ▲ is projected to increase 42 percent between 2011–12 and 2023–24.

The number of associate's degrees awarded to women

- ▲ increased 82 percent between 1998–99 and 2011–12; and
- ▲ is projected to increase 36 percent between 2011–12 and 2023–24.

For more information:
Table 21

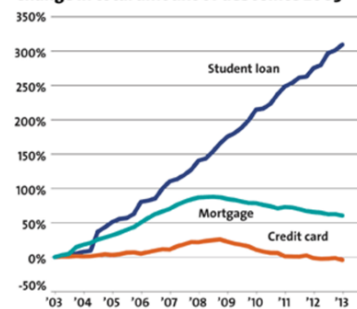
Figure 24. Actual and projected numbers for associate's degrees conferred by postsecondary degree-granting institutions, by sex of recipient: Academic years 1998–99 through 2023–24



NOTE: Some data have been revised from previously published figures. Mean absolute percentage errors of selected education statistics can be found in table A-2, appendix A. SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), "Completions Survey" (IPEDS-C-99); IPEDS Fall 2000 through Fall 2012 Completions component; and Degrees Conferred Projection Model, 1980–81 through 2023–24. (This figure was prepared August 2014.)

The cost of college continues to rise and more and more students are taking out student loans to pay for their education. Roughly, 20% of households now owe student loan debt. Since 1989, student loan debt has increased substantially by 177% with 40% of this debt owed by someone younger than 35 years old. *Source: PEW Research Center tabulations of Survey of Consumer Finances data*

Change in total amount of debt since 2003



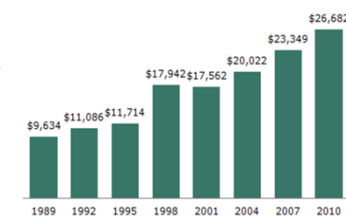
Source: Federal Reserve Bank of New York

student loan debt has significantly surpassed mortgage and credit card debt from 2003 to 2013. In

2012, the Financial Stability Oversight Council (FSOC) reported that half of students loans were delinquent. Consequently, the burden of student loan debt affects the entire economy as it's making it more difficult for college graduates to fuel our economy by contributing to the housing market or taking on nonprofit, government, or education jobs since these jobs pay less, which in turn may lead to less consumer spending. *Source: Financial Stability Oversight Council (FSOC)*

The Average Student Debt Outstanding among Households with Student Debt, 1989–2010

In 2011 dollars

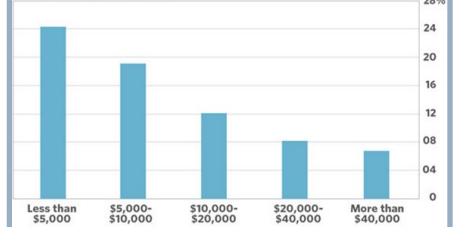


Note: Includes education loans that are currently in deferment and loans in scheduled repayment period. SOURCE: PEW Research Center tabulations of Survey of Consumer Finances data. PEW RESEARCH CENTER

Every student is required to sign a Master Promissory Note (agreement to repay) and entrance counseling forms as a borrower. Every college has a cohort default rate that looks at borrowers who enter repayment. MPTC's latest default rate is 12.3%. When a college or university reaches 25% or more, they can start losing flexibility with financial funding if not all ability to offer federal aid. Many students who default at MPTC who left without completing a degree/diploma have a small balance (e.g., \$1750). The chart below represents a similar trend to MPTC's default rate.

Borrowers with small balances default more

Default rates by loan amount



Note: Data is for borrowers entering repayment in fiscal year 2011. SOURCE: Department of Education

SOURCES

Many sources were compiled to create this comprehensive environmental scan report. A combination of publicly available data from reputable organizations, paid databases, and WTCS data were used to create the main sections of this report. Miscellaneous sources such as online news articles were used to produce the “Education Hot Topics” section.

Online Resources	
Bureau of Economic Analysis	https://www.bea.gov/
Bureau of Labor Statistics	https://www.bls.gov/
U.S. Census (includes prisons)	http://www.census.gov/
<i>2007-2011 American Community Survey</i>	
<i>2011-2015 American Community Survey,</i>	
<i>5-year estimates</i>	
<i>Nonemployer Statistics</i>	
<i>On the Map</i>	
<i>Population Division</i>	
Wisconsin Taxpayers Alliance	http://wistax.org/

Databases	
EMSI	http://www.economicmodeling.com/
<i>Quarterly Census of Employment and Wages (QCEW)</i>	
<i>Employees only</i>	
ESRI	http://www.esri.com/
<i>Bureau of Labor Statistics, 2013 and 2014 Consumer</i>	
<i>Expenditure Surveys</i>	

Other	
WTCS client reported data	State cubes
Miscellaneous sources	
<i>Financial Stability Oversight Council (FSOC)</i>	https://www.treasury.gov/initiatives/fsoc/Pages/home.aspx
<i>Integrated Postsecondary Education Data System</i>	
<i>(IPEDS)</i>	https://nces.ed.gov/ipeds/
<i>Minneapolis/St. Paul Business Journal</i>	http://www.bizjournals.com/twincities
<i>PEW Research Center & the Survey of Consumer</i>	
<i>Finances data</i>	http://www.pewresearch.org/
<i>US Department of Education</i>	https://www.ed.gov/
<i>Western Interstate Commission for Higher Education</i>	http://www.wiche.edu/
<i>various online news articles and more</i>	

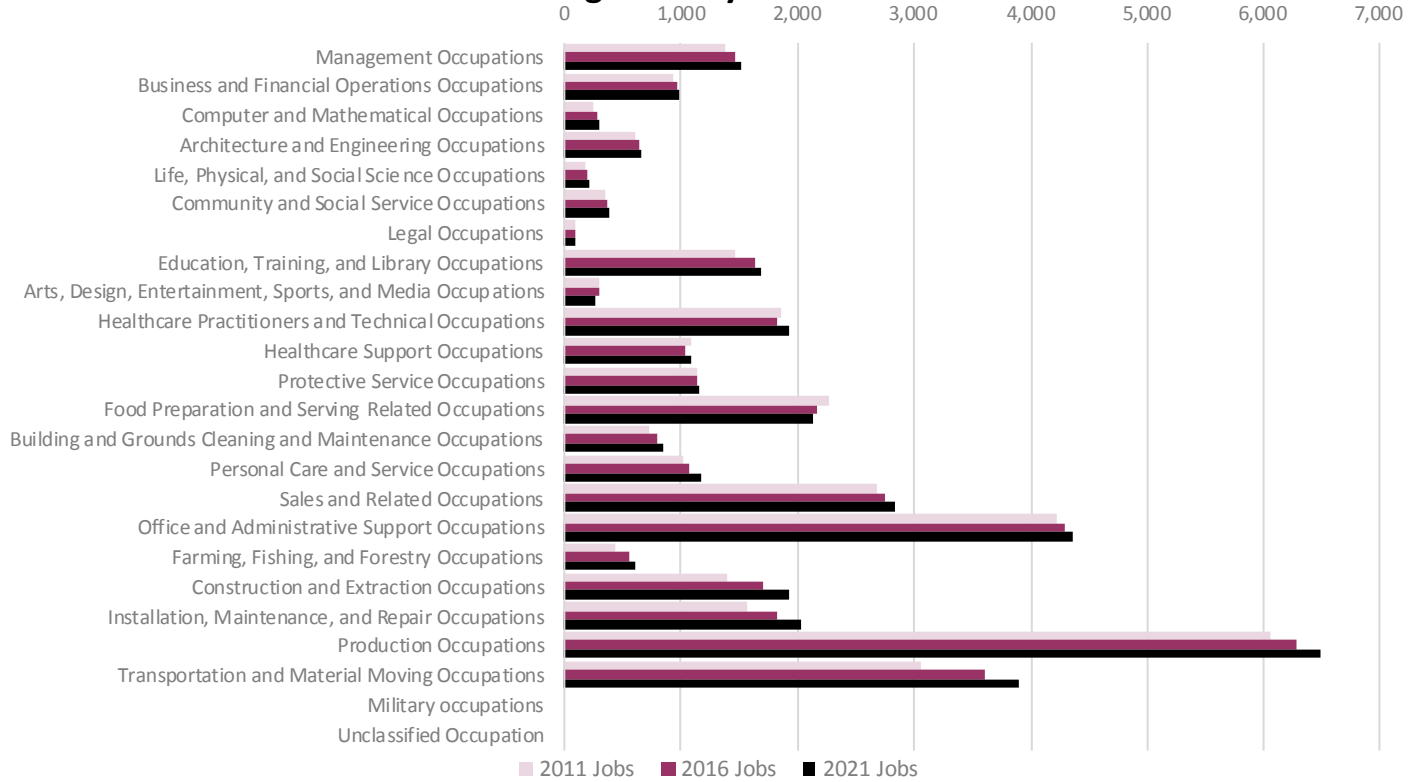
ENVIRONMENTAL SCAN

Appendix

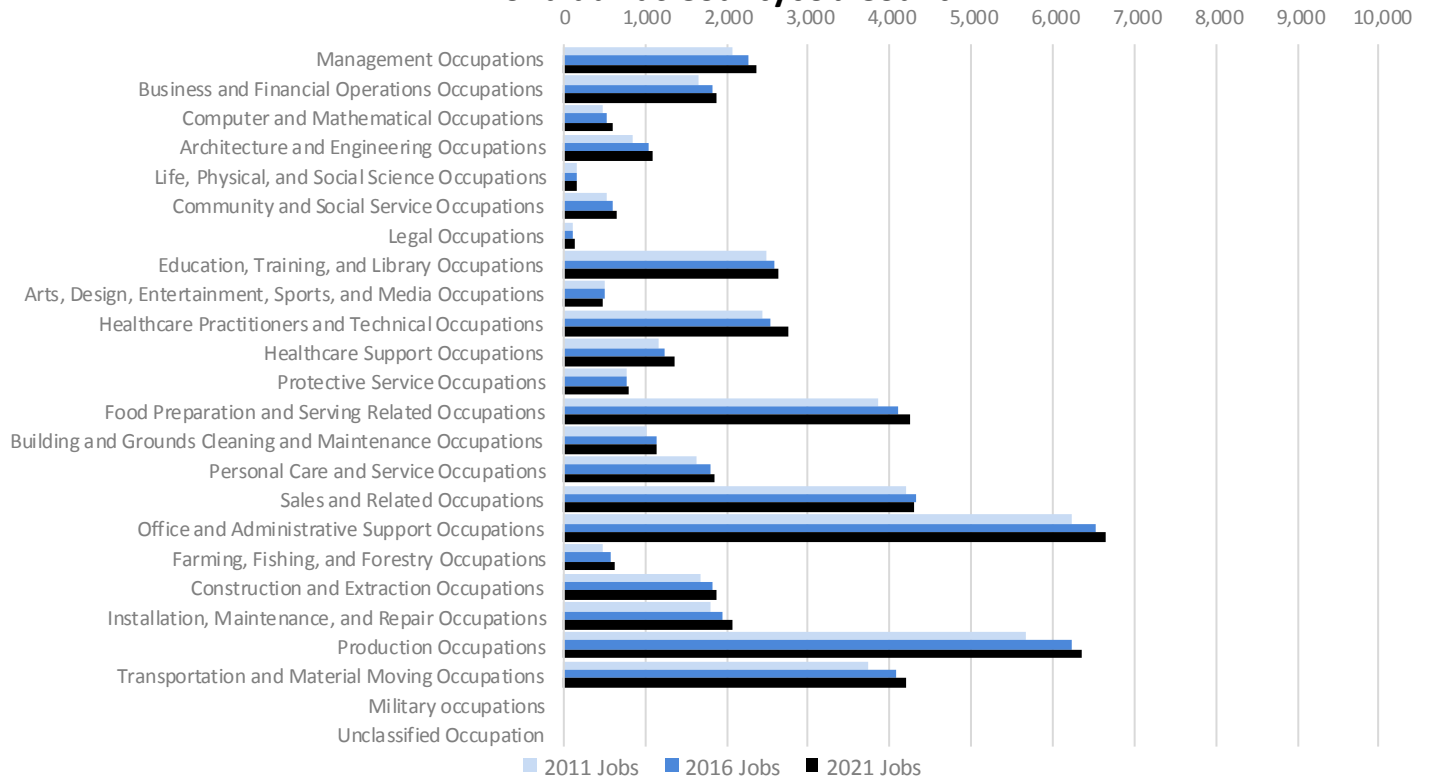


A — All 2-digit SOC codes

Dodge County Job Count

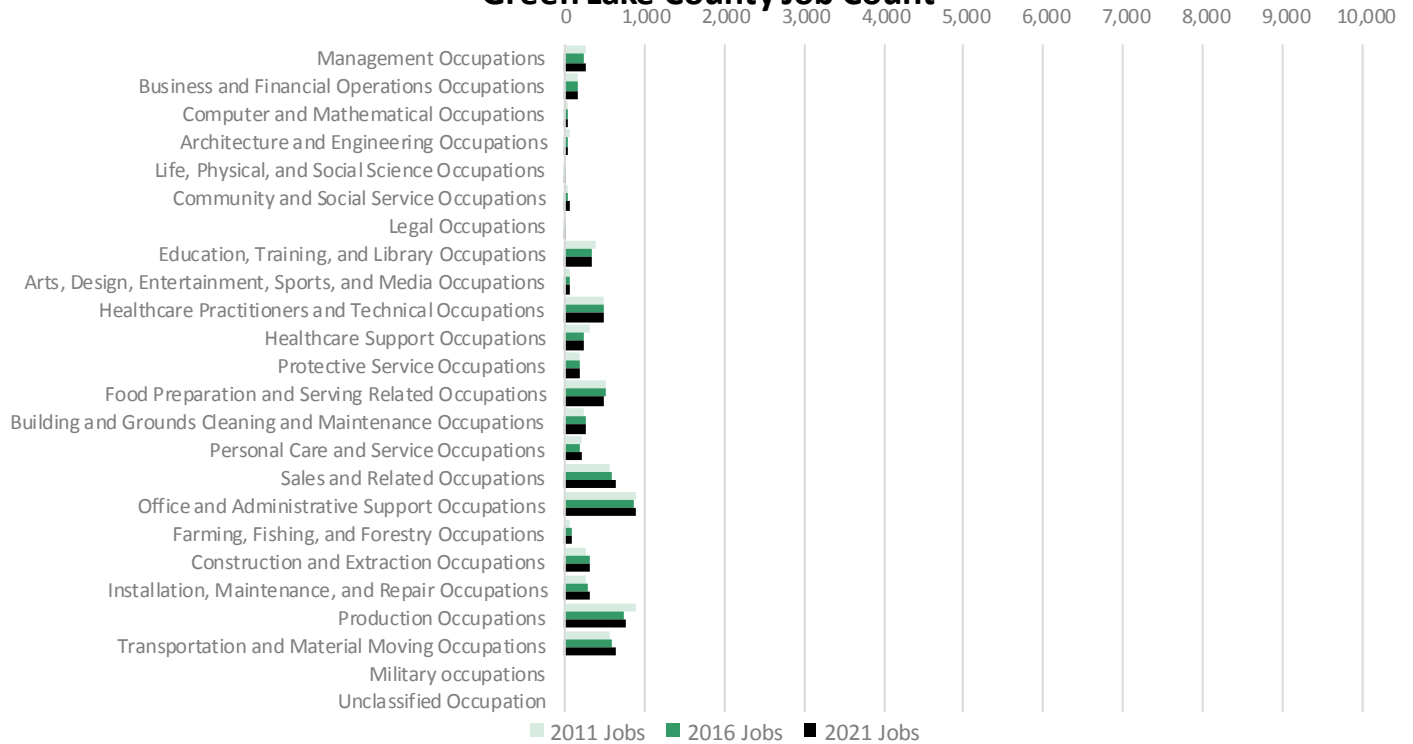


Fond du Lac County Job Count

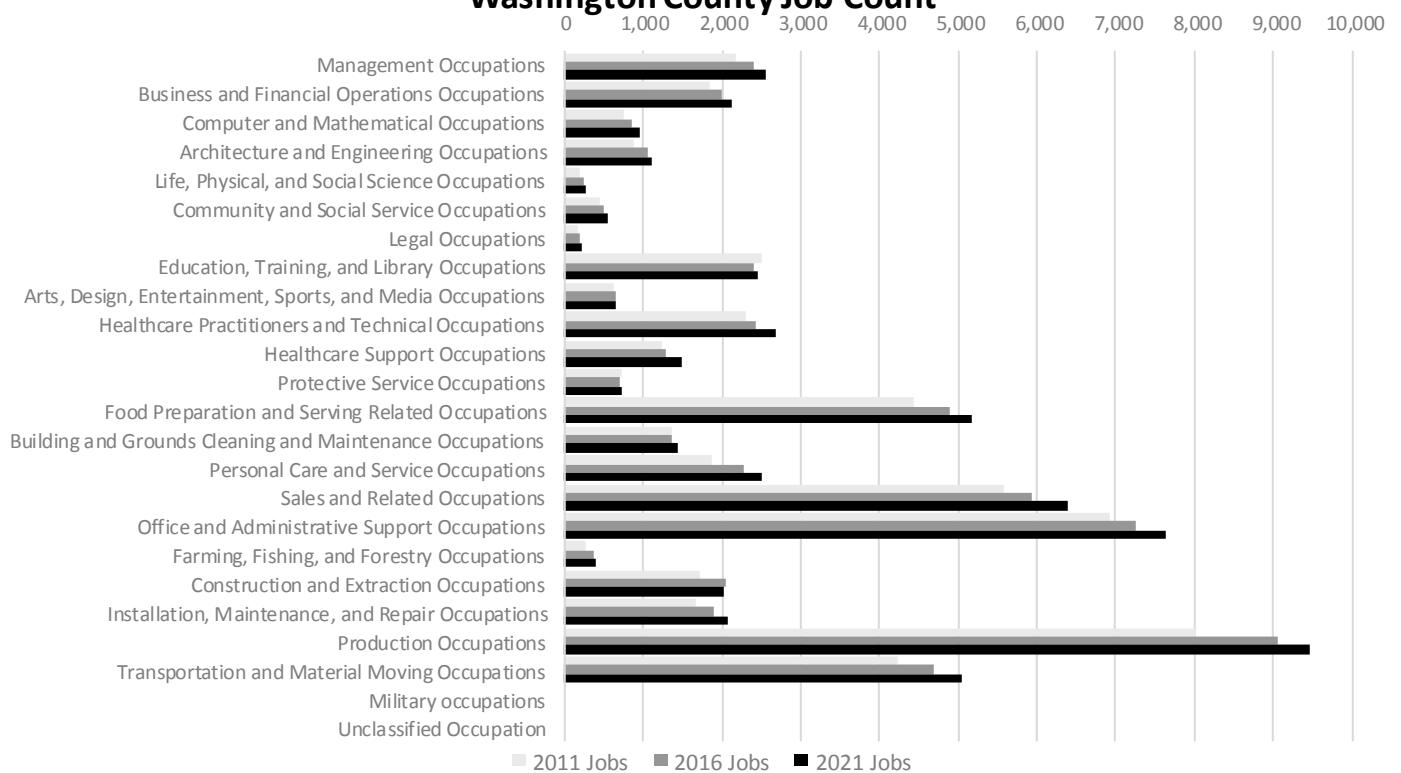


A — All 2-digit SOC codes

Green Lake County Job Count

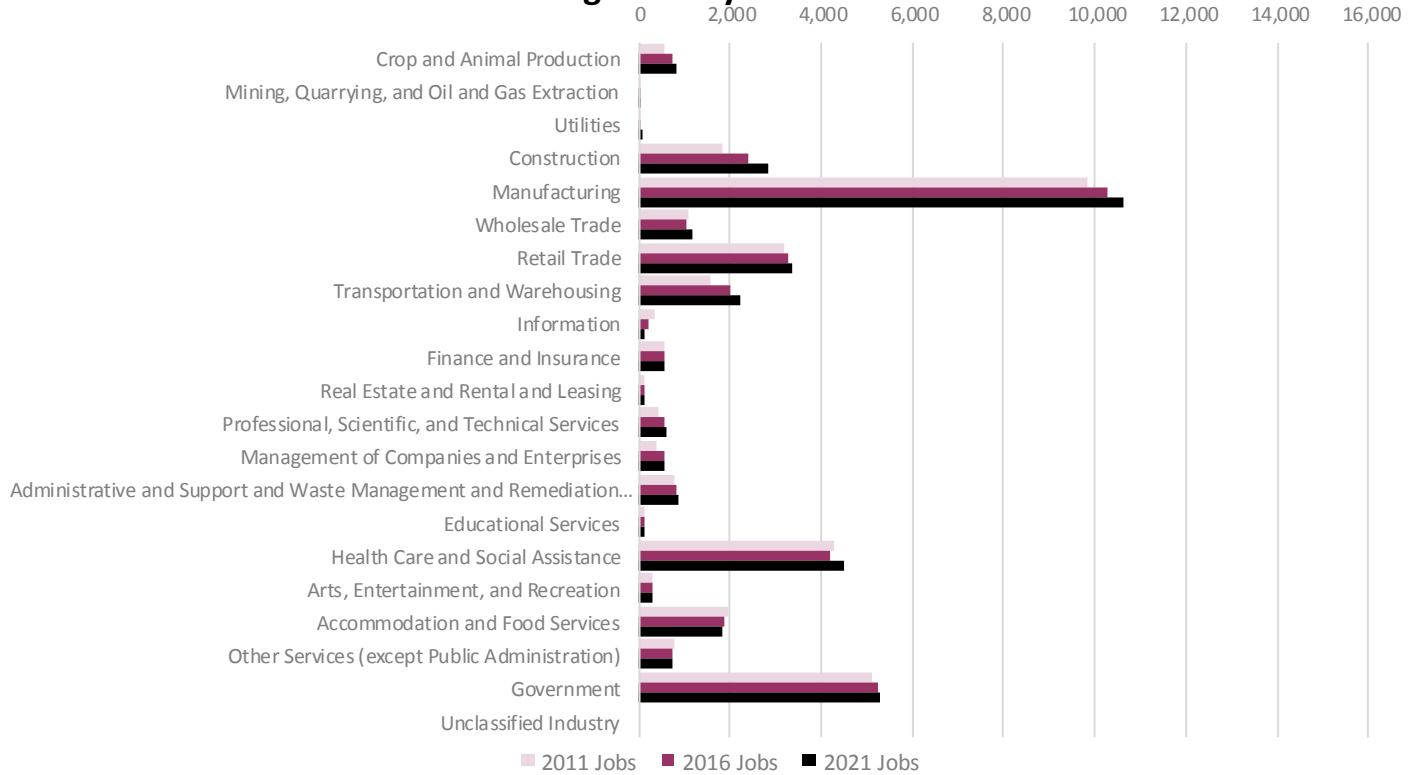


Washington County Job Count

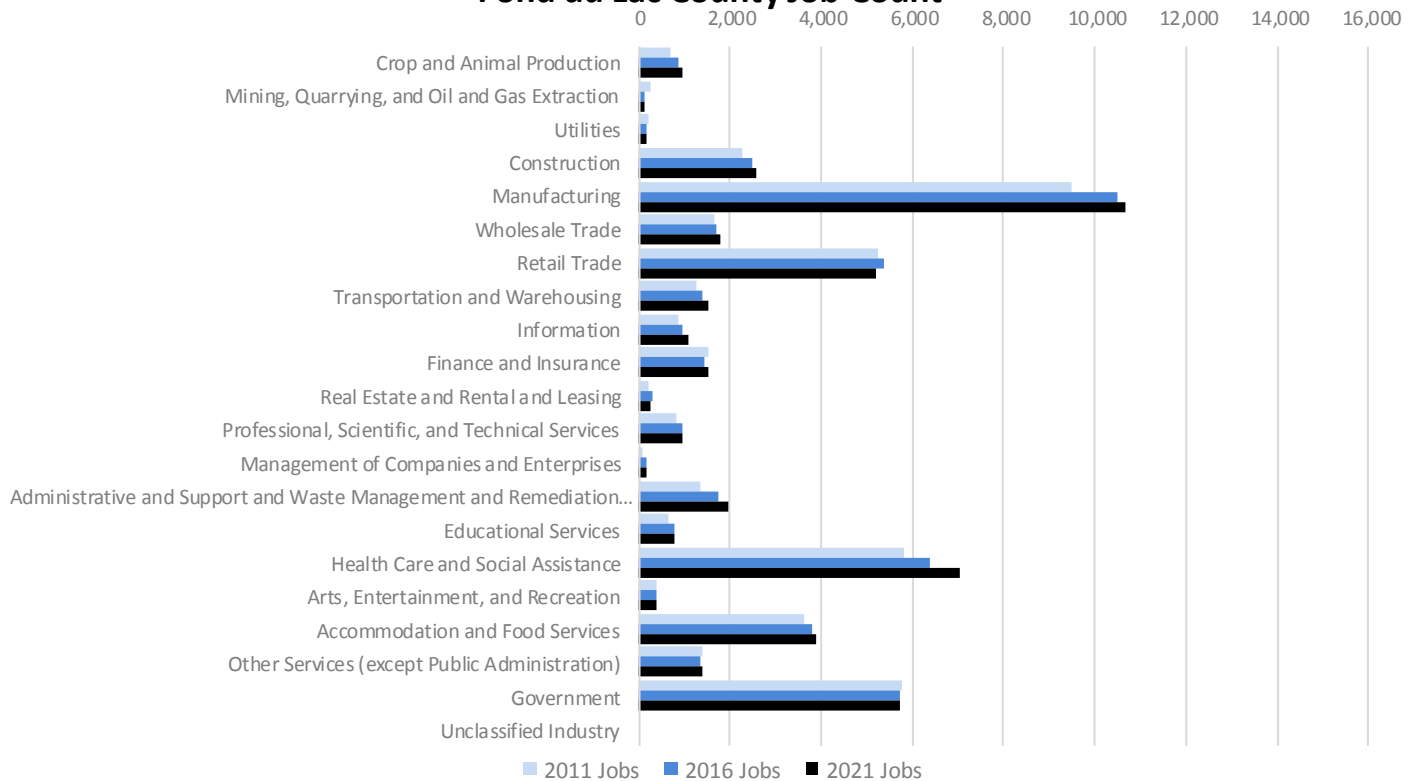


B — All 2-digit NAICS codes

Dodge County Job Count

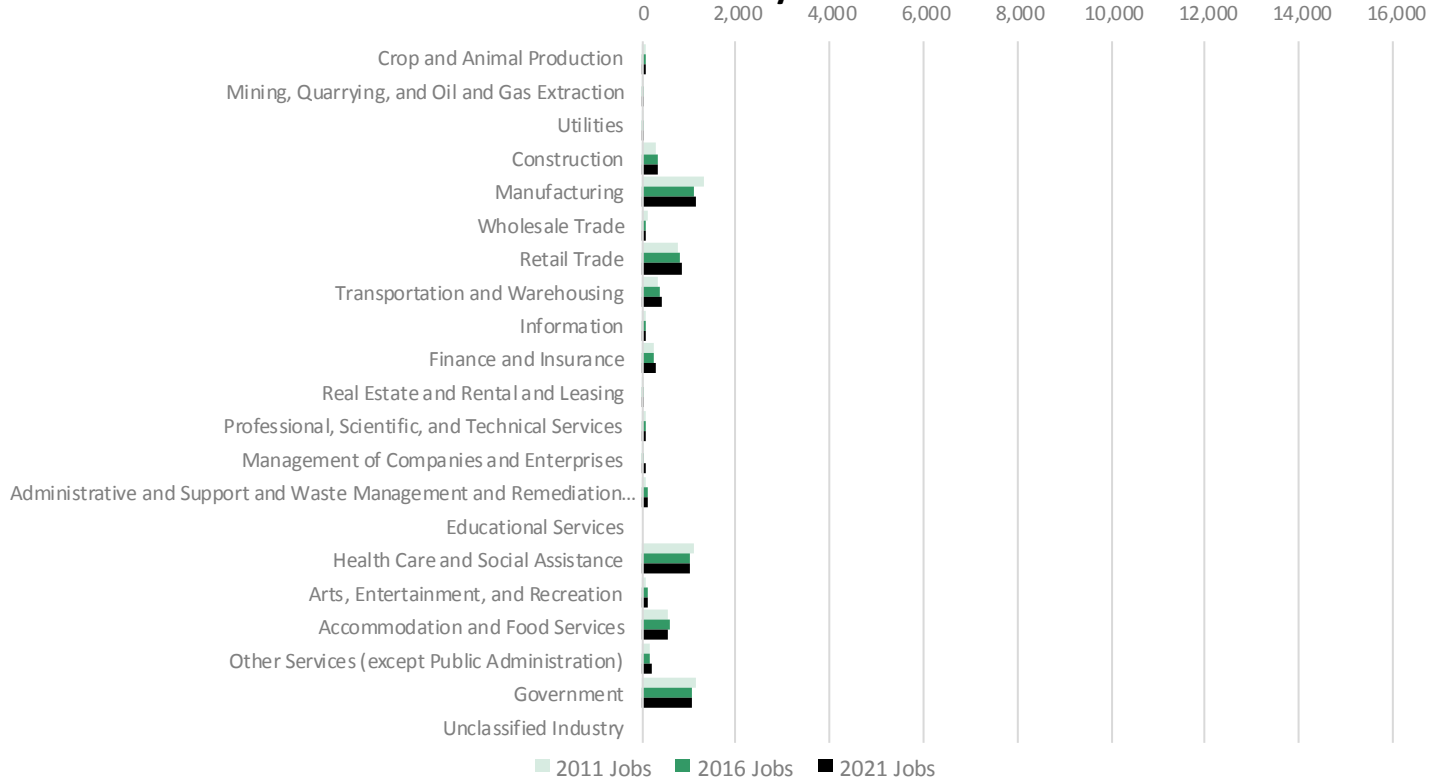


Fond du Lac County Job Count



B — All 2-digit NAICS codes

Green Lake County Job Count



Washington County Job Count

