



Assessment of the Technical and Two-Year
Postsecondary Education Needs In
Greater St. Mary Parish Area, Louisiana

*Response to House Concurrent Resolution 170 Offered by
Representative Jones and Senator Allain*

Final Report

Prepared for:

Louisiana Board of Regents
Louisiana Community and Technical College System

Prepared by:
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INTRODUCTION

This report offers recommendations to provide access to community college services in the Greater St. Mary Parish Area to meet the growing credential needs of the region's companies, its economy, and its people. It is in response to House Concurrent Resolution 170, sponsored by Representative Jones and Senator Allain in the State of Louisiana's regular legislative session in 2013. The resolution asks the Board of Regents and Board of Supervisors of Community and Technical Colleges to "study the feasibility of offering community college services in the Greater St. Mary Parish Area and to determine how the state can best meet the educational needs of students and the economic and workforce development needs of this region and state."

The resolution grew from two concerns about the people and economy of the Greater St. Mary Parish Area. First, the expansion of the oil and gas industry in the region promises to create an unprecedented demand for a workforce in the area with higher-level skills for more technically complex jobs. Employers and data indicate that the need for more workers with higher skills extends to other industries in the region as well. Projections show that most of the jobs in higher demand require some type of postsecondary credential: a technical certificate, Associate's degree, or Bachelor's degree. A recent report by the Georgetown University Center on Education and the Workforce projects that by 2018 51 percent of the state's jobs will require some type of postsecondary credential. To meet that projection, the state's educational system needs to double the share of working age adults who hold at least a two-year degree by 2018.¹

Second, independent of the oil and gas industry, the people of the region—students and working adults—may need greater access to education than they have now. As the region's economy has shifted from agriculture and sugar cane production to newer, technical-based industry and services, the skills and educational attainment of the residents have not kept pace. Some of the region's parishes have the lowest educational attainment rates in the state, placing the people and the region at an economic disadvantage over the long-term. The study resolution HCR 170 asks if postsecondary education needs to increase in the region to provide more people with better opportunities.

In some areas and in some fields of study the educational assets in the region are remarkable. Area employers, especially related to oil and petrochemical production, are deeply engaged in assuring that their workforce can keep up with advanced technologies and requirements in the industry. An appropriately educated, credentialed workforce sends a strong message to existing companies and potential new companies that the region can meet their needs if they want to expand or locate here. That means the seven-parish Greater St. Mary Parish Area needs to continue to build a workforce that is increasingly productive, skilled, and credentialed.

The Board of Regents and Louisiana Community and Technical College Board of Supervisors hired FutureWorks to conduct an analysis to address the directives of HCR 170 and provide recommendations as to how the region's educational needs could best be met. This report is a

¹ Carnevale, Anthony P., Smith, Nicole and Strohl, Jeff. "Help Wanted Projections of Jobs and Education Requirements Through 2018," The Georgetown Center on Education and the Economy, 2010 and "A stronger nation through higher education," Lumina Foundation, February 2009.

compilation of FutureWorks' industry and labor market analysis, extensive qualitative research gathered through interviews and focus groups,² and review of secondary research and reports on the economic, workforce and higher education systems in the Greater St. Mary Parish Area. The report outlines a clear path forward to align education delivery system for residents and the regional economy through a series of collaborative efforts. And, in order to maximize the sustainability of educational services, we recommend strategies to integrate services between South Central Louisiana Technical College and Fletcher Technical Community College. The report identifies several steps to improve access to sub-baccalaureate postsecondary education in the region.

Demographics

There are seven parishes in the Greater St. Mary Parish Area of South Central Louisiana defined by the study resolution and its sponsors. The parishes are Assumption, Lafourche, St Charles, St. James, St. John, St. Mary and Terrebonne parishes.³ The parishes vary widely in population size and degree of urbanization. Terrebonne and Lafourche are by far the largest parishes in the region in land area and population. The two parishes combined have over 200,000 residents. Assumption and St. James, located on the northwestern side of the region, each have roughly 23,000 residents. They have the smallest populations. Mid-sized parishes in the region are St. Mary, St. John, and St. Charles, each with populations of 54,360, 46,310, and 52,662 respectively. (See table 1 on page 4.)

St. Mary Parish's total population of 54,360 is concentrated in the area's eastern portion. Just three municipalities in this area, Morgan City, Berwick and Patterson, represent about 40 percent of St. Mary's population (or about 20,000 residents). Another 20 percent of the parishes' population (10,000 residents) is in Franklin and Baldwin, two towns located on the southwestern edge of the parish. Along the northern boundary of the parish is the Atchafalaya River that blends into the Gulf around Morgan City in eastern St. Mary Parish. This area is heavily developed by the oil and gas industry that services offshore production rigs in the Gulf of Mexico.

The rate of labor force participation in the seven-parish region is roughly equal to the state as a whole. Only Assumption Parish has a labor force participation rate that is significantly lower than the state as a whole (55 percent in Assumption and 62 percent in the state). Income in the seven-parish region generally is well above the state median household income. The State of Louisiana has a median household income of \$44,086. St. Charles has the region's highest median household income of over \$60,207. In part, that is due to St. Charles' proximity to New Orleans and the higher wage economy of that metro area. Five other parishes in the area have median household incomes above the state average. They range from \$46,699 in Assumption to

² FutureWorks interviewed and met with more than 39 people during the St. Mary Parish Area site visit, including employers, economic developers, educators, legislators, and civic leaders.

³ We do not include St. Martin Parish in the data collected because of its geographic division by Iberia Parish. The largest proportion of St. Martin's population is to the north of Iberia Parish and we are not able to easily disaggregate statistics for the two parts of St. Martin parish. It appears that if we included statistics for all of St. Martin it would distort some of the characteristics and services available in the greater St. Mary parish area.

\$52,887 in St. James. At the other end of the spectrum is St. Mary Parish. In 2011, its median household income was \$40,171, more than \$4,000 below the average for the State of Louisiana. It is the only parish in the area with a household income below the state median.

Poverty rates also show St. Mary Parish lagging the state and other parishes in the region. In 2011, St. Mary Parish had a poverty rate of 17.4 percent, more than three percentage points above the poverty rate for the State of Louisiana as a whole (14.1 percent). In addition to St. Mary Parish, only Terrebonne's 14.3 percent poverty rate was above the state average in the Greater St. Mary Parish area. The other five parishes had lower poverty rates than the state.

Rates of educational attainment across all parishes in the Greater St. Mary Area are consistently lower than the state as whole. In 2011, 25.7 percent of all Louisiana residents held either an associate or Bachelor's degree. Five of the seven parishes in the region have rates of postsecondary attainment that are less than or close to one-half the state average, ranging from a low of 9.4 percent in Assumption and 10.9 percent in St. Mary to 12.8 percent in Terrebonne, 13.4 percent in St. James, and 13.7 in Lafourche. The two parishes with the highest educational rates in the region are 17.2 percent in St. John and 21.5 percent in St. Charles, both still below the statewide rate.

The relatively low educational attainment rates with high household incomes across the region suggest there are many good paying jobs that do not require a college degree in the Greater St. Mary Parish Area. For example, in Assumption Parish only 9 percent of the adults hold a degree. Residents of that same parish have a median household income that is higher than the state as a whole. That is true in most of the other parishes as well -- educational attainment is less than the state as a whole, but median household income is higher than the state average. St. Mary Parish is the only exception. In St. Mary Parish, both rates of educational attainment and median household are significantly lower than state as a whole.

Interestingly, the rates of 'some college but no degree' among residents from the region are higher than the state as a whole. This statistic suggests that many parish residents enroll in college or take classes, but many fewer complete a degree program or obtain an associate or Bachelor's degree. The data do not show if those who report 'some college but no degree' hold a technical certificate or short-term diploma from a postsecondary program. Even so, the low proportions of a completed credential of any type are important when considering what kinds of employment opportunities are available to residents and how employers' needs for a credentialed workforce is met. The gap may be getting wider between the requirement for postsecondary credential and the proportion of residents who hold them.

Parish	Population	Percent in Labor Force	Median Household Income	Unemployment Rate, 2011	Family Poverty Rate	Percent Some College No Degree	Percent with Assoc. Degree	Percent with Bachelor Degree +
Louisiana	4,484,596	61.7	44,086	8.0	14.1	20.5	4.8	20.9
Assumption	23,421	54.6	46,699	9.1	13.0	14.1	3.4	6.0
Lafourche	95,895	59.9	49,262	4.7	11.7	15.1	3.8	9.9
St. Charles	52,662	66.7	60,207	7.0	11.8	21.0	6.9	14.6
St. James	22,662	60.4	52,887	9.9	13.6	17.1	4.5	8.9
St. John	46,310	64.7	49,671	10.0	11.9	22.9	5.3	11.9
St. Mary	54,360	61.4	40,171	8.7	17.4	18.2	3.6	7.3
Terrebonne	111,518	61.0	48,166	5.9	14.3	16.8	3.3	9.5

Sources: US Bureau of the Census, American Community Survey, 2007-2011; LA Works; BLS-LAU; labor force data are for population 16 years or older; poverty rate is for families; educational attainment percentages are for population 25 years or older, percent with Bachelor Degree + is for educational attainment of population earning a Bachelor's degree and/or post-graduate degree.

Industry and Occupations

The oil and gas industry has a remarkable presence in the Greater St. Mary Parish Area,⁴ shaping the visual landscape along the Gulf and river ways as well as the area economy. Oil and gas, marine transportation, construction, and shipbuilding have employment concentrations in the seven-parish area that range from five to 100 times the national average. They employ 36 percent of the region's workforce. The statewide average for the same industries is 27 percent.⁵ Wages in these industries range from \$56,000 per year in shipbuilding to \$89,000 per year in marine transportation.

The industry also continues to grow. Between 2003 and 2012, employers in the deep sea/inland water transportation segment added more than 4,200 jobs in the region. Employers from the utility-related construction segment added just about 1,700 jobs, oil and gas extraction added 1,600 jobs, and shipbuilding manufacturers added more than 1,200 jobs in the region. Table 2 on the next page illustrates the concentration and growth of the industry in the region.

⁴ Industry and occupational data are for the seven-parish area including Assumption, Lafourche, St Charles, St. James, St. John, St. Mary and Terrebonne parishes.

⁵ FutureWorks estimated derived from U.S. Census, American Community Survey, 2007-2011, Civilian Employed Population 16 years of Age and Older by Industry. See table 3.

Table 2. Greater St. Mary Parish Area Oil and Gas Related Industry Employment

Industry Segment Description	2003 Jobs	2012 Jobs	Change	2013 Average Earnings	2012 Location Quotient*
Inland Water Transportation	1,242	3,598	2,356	\$78,803	100.1
Deep Sea/Coastal Water Transportation	237	2,141	1,904	\$83,660	39.0
Utility System Construction	811	2,504	1,693	\$68,274	4.2
Oil and Gas Extraction	1,146	2,747	1,601	\$94,156	2.5
Construction & Mining Machinery Mfg.	3,286	4,886	1,600	\$66,604	15.1
Ship and Boat Building	4,165	5,369	1,204	\$56,287	31.4
Support Activities for Mining	7,078	7,881	803	\$76,866	14.2
Petroleum and Coal Products Manufacturing	2,627	3,124	497	\$118,167	21.4
Other Heavy & Civil Engineering Construction	1,521	1,482	(39)	\$55,742	7.7
Industrial Machinery & Equipment Repair**	1,376	1,328	(48)	\$59,886	4.1
Support Activities for Water Transportation	7,757	7,332	(425)	\$89,135	59.1
Basic Chemical Manufacturing	3,128	2,587	(541)	\$98,217	14.0

Source: US Bureau of Labor Statistics QCEW, EMSI Self-employed and extended-proprietorships
 *Location Quotient is St. Mary Parish Area concentration in jobs relative to US; any number over 1.0 is a greater concentration than the US as a whole and indicates local specialization of an industry.
 **doesn't include automotive or electronic machinery

Recent increases in oil and gas production and new sources of petroleum now promise even greater expansion. Our interviews with employers and economic development professionals indicate that this growth has resulted in tremendous demand for workers in all segments of the industry. A recent report commissioned by the Louisiana Workforce Commission sizes some of this demand. The report found that there is industry demand for an additional 86,300 skilled craft workers statewide needed to construct \$60 billion worth of new plants and plant expansions already announced in Louisiana.⁶ Many of those plants are located in the Greater St. Mary Parish area. Local leaders say that there are plans for upwards of 50 new inland and deep-sea oilrigs in the next five years. Moreover, the report states that the sheer scale of demand will create a tremendous pull on workers with similar skill requirements in related industries, thereby spreading the gap between demand and supply of appropriately skilled workers.

There are some differences in the type of demand through the seven-parish area. For example, industry demand for oil and gas workers in the Morgan City area is strongest for offshore and deep sea, marine related shipbuilding, barge fabrication, welders, extraction, and construction services. In the Schriever-Houma area there is a high concentration of demand to serve the mid-to downstream portion of the industry, which means employers place a premium on on-shore and off-shore integrated production technology and ship and boat operators. And, in the River Parishes corridor, which includes the parishes of St. John, St. James, and St. Charles, there is more demand for downstream services in process technologies, instrumentation, and industrial repair and maintenance for the petrochemical industries that line the corridor.

⁶ Louisiana Workforce Commission, "Building Louisiana's Craft Workforce," A Project of the Craft Workforce Development Task Force of the Louisiana Workforce Investment Council, June 2013.

Consistent across all of the industry segments and regional differences is the increasing need for technically trained workers with industry-related certifications and competencies. Employers we interviewed stressed that there is increased levels of education and training required for licensing and permitting in the industry. In part, that is because companies increasingly are required to demonstrate a credentialed workforce that can meet a host of federal safety training and regulatory-related technical skills. Employers also stressed that increasingly complex technologies are being integrated into most jobs in the field, both on-shore and offshore. Workers in the industry need to use more complex mechanical and electronic equipment, and apply sophisticated simulation, sensing, and drilling technologies to their jobs.

The immediacy and scale of demand for workers in oil and gas tends to overshadow other workforce needs in the region. Data show that healthcare, one of the region's larger industries, has demand for workers.⁷ Like oil and gas, healthcare has increased the requirements for technically skilled, credentialed workers, from environmental services up to the clinical professions. In the last year, healthcare employers posted more than 900 job openings for workers. The highest demand was for registered nurses, licensed practical nurses, and physical therapists.⁸ Each of these positions requires an educational credential, from a one-year diploma for a licensed practical nurse to at least a two-year associate degree for a registered nurse to a graduate degree for a physical therapist.

Other industries also require growing numbers of skilled and educated employees. Local leaders identified other occupations in manufacturing segments, hospitality (hotels, food establishments, and casinos), and professional services (related to oil and gas) as growing and with demand for skilled and credentialed workers. Table 3 on the next page shows the distribution of resident employment in occupations and industries in the Greater St. Mary Parish Area. The data show a high concentration of the workforce in manufacturing and a set of other industries, such as services and retail trade. Those concentrations are similar to the rest of the state.

⁷ There are just about 12,000 jobs in the region's healthcare industry, according to 2012 data collected from EMSI. It is second largest private sector industry in the St. Mary Parish Area next to oil and gas related industries.

⁸ Burning Glass Labor Insight Real-time Labor Market Information job postings September 31, 2012-October 1, 2013.

OCCUPATION	Louisiana	Greater St. Mary Area
Management, professional, and related occupations	31%	27%
Service occupations	18%	15%
Sales and office occupations	25%	24%
Construction, extraction, maintenance, and repair occupations	13%	15%
Production, transportation, and material moving occupations	13%	19%
Civilian employed population 16 years of age and older	1,974,967	178,794
INDUSTRY		
Agriculture, forestry, fishing and hunting, and mining	4%	8%
Construction	9%	9%
Manufacturing	8%	12%
Wholesale trade	3%	3%
Retail trade	12%	12%
Transportation and warehousing, and utilities	5%	7%
Information	2%	1%
Finance and insurance, and real estate and rental and leasing	5%	4%
Professional, scientific, & management, & admin and waste mgmt services	8%	7%
Educational services, and health care and social assistance	23%	19%
Arts, entertainment, and recreation, and accommodation and food services	10%	8%
Other services, except public administration	5%	5%
Public administration	6%	4%
Source: U.S. Census, American Community Survey, 2007-2011; The Greater St. Mary Parish Area includes Assumption, Lafourche, St. Charles, St. James, St. John the Baptist, St. Mary, and Terrebonne parishes.		

Postsecondary Educational Resources and Services

This section of the report describes the availability and volume of educational services delivered to residents in the seven-parish Greater St. Mary Parish Area. It highlights educational services at the four major postsecondary colleges that provide community college and technical education to all or part of the area. These institutions include South Central Louisiana Technical College (SCLTC), South Louisiana Community College (SLCC), River Parishes Community College (RPCC) and L.E. Fletcher Technical Community College (FTCC).

Technical College: South Central Louisiana Technical College (SCLTC) serves residents of all seven parishes in the study region. The college has three campus locations distributed across the parishes: Lafourche, River Parishes and Young Memorial. In addition, SCLTC offers courses in Franklin at the Franklin High School. There is also an extension campus in Galliano, and that is included in the Lafourche campus operations.

SCLTC enrolled about 2,110 students in 2012-2013.⁹ River Parishes campus has the largest enrollment with 873 students, followed by Young Memorial with 384 and Lafourche with 225. An additional 628 students enrolled in diploma, certificate or degree granting programs in marine operations offered at the Young Memorial Campus. Each campus enrolled a significant number of high school students through dual enrollment programs; an additional 2,100 high school students enrolled in SCLTC through dual enrollment. Dual enrollment brings the total number of students enrolled in the college to just over 4,200.

In terms of completions of certificates, associate degrees and diplomas, in 2013 SCLTC awarded 479 credentials: 101 associate’s degrees, 145 diplomas, and 233 certificates. SCLTC awarded a large majority of its associate degrees, about 80 percent, and nearly one-third of all credentials in engineering technology. The high proportion of awards in this field indicates the relatively large influence of the oil, gas and petrochemical industry on the college. SCLTC River Parishes campus offers a Process Technology (PTEC) program, the only associate degree offered in engineering technology at SCLTC’s campuses. It largely serves workers going into the petrochemical processing industry along the northern edge of the region.

Table 4 shows credentials awarded and program fields of study available at the college. Beyond its engineering technologies degrees, SCLTC awarded relatively few associate degrees in other programs. These other credentials were mainly diplomas and certificates in occupational fields. SCLTC programs in the health professions and business administration accounted for over one-half of the diplomas and one-third of the certificates awarded. Those proportions are typical for postsecondary occupational institutions.

CIP 2 Digit Code	Field of Study	Diploma	Certificate	Associates Degree	Totals Awards
11	Computer and Information Technology	10	18	0	28
15	Engineering Technologies	30	32	84	146
46	Construction Trades	11	10	0	21
47	Mechanics and Repair Technicians	24	51	0	75
48	Precision Production	5	1	0	6
49	Transportation and Material Handling	0	34	0	34
51	Health Professions	28	33	5	66
52	Business, Management, Administrative Services	37	54	12	103
	Totals	145	233	101	479

Source: Louisiana Board of Regents, 2013

In addition, SCLTC Young Memorial’s Marine / Oil and Gas program awards a very high number of short-term certificates (Technical Competency Awards). These awards are largely non-credit certificates and translate to few or none for-credit hours at the college. According to data supplied by SCLTC in table 5 on the next page, about 2,000 students enrolled in programs at the Marine / Oil and Gas center. These students received about 3,300 certificates and

⁹ Enrollment figures supplied by SCLTC office of institutional research.

certifications in skills related to offshore drilling operations and safety. SCLTC awarded an additional 400 short-term, non-academic certificates in other fields.

Table 5. South Central Louisiana Technical College, Short-term Certificates awarded: 1 year or less (TCA), July 1, 2012 through June 30, 2013		
Programs	Number Awarded	Number Students
Air Conditioning and Refrigeration	17	16
Automotive	61	44
Business Office	63	62
Commercial Driving	17	17
Computer Networking	5	5
Drafting	6	6
Diesel Mechanic	15	15
Electrical	5	5
Industrial Instrumentation	8	8
Industrial Maintenance	3	3
Marine Operations	3309	1966
Nurse Assistant	37	37
Patient Care	87	42
Practical Nursing	26	26
Welding	118	76
Total Certificates and Students	3777	2328
Source: South Central Louisiana Technical College, 2013		

The data show that the operations of SCLTC are related closely to the oil and gas industry. In fact, based on 2012-2013 data for each campus of SCLTC, enrollments in oil and gas related courses and programs far surpass enrollments at all other programs at the college. For example, at the River Parishes campus 520 of the 853 enrollments were in Industrial Instrumentation and Process Technology. All 13 other diploma, certificate or degree programs offered at that campus, including programs that range from Medical Assisting to Welding, account for the remaining 300 students. At the Young Memorial Campus, the Marine / Oil and Gas program enrolled 628 students and another 1,966 students took short-term marine operations courses. There were 384 students enrolled in all other non-oil and gas industry programs at the college in 2013.¹⁰

SCLTC's partnership with the oil and gas industry is unique. It has developed over a long time and, by most measures available, meets a pressing need for industry and the related employment gives good income to residents. Industry has supported these programs at the college by donating a remarkable amount of equipment and facilities. One further indication of the

¹⁰ Campus enrollment data supplied by SCLTC institutional research.

uniqueness of this partnership is the application of SCLTC for the state’s special designation of this part of the college as a Marine/Oil and Gas Center of Excellence.

While the oil and gas related programs are very strong and serve an important part of the regional economy, the data also suggest that programs that fall outside of this concentration have relatively limited enrollments. It is not clear whether this is a result of the predominance of the oil and gas programs or if there is simply not as much demand for other programs. One consequence, however, is that the non-oil and gas programs are more vulnerable to losses of state funding and limited tuition income. Moreover, given state financing models for postsecondary education over the last several years, it is difficult to continue to invest in new programming or in other areas other than oil and gas related programs. It will be a challenge for SCLTC to maintain the long-term viability of these smaller programs -- especially so when there are three community colleges surrounding SCLTC that offer programs in the same fields.

SCLTC draws students from all seven of the parishes in the study region. Table 6 below shows the distribution of SCLTC students by their home parish.¹¹ The data show that roughly 75 percent of SCLTC’s total enrollment is from five parishes: St Martin, St Charles, St John, Lafourche and St. James.¹² The three other parishes in the study region accounted for a little over 6 percent of the college’s enrollment. St. Mary Parish residents, for example, represent just 3 percent of the total enrollment, or about 90 students. There is a small campus in Franklin in the northwest part of St Mary Parish, but most of the enrollments from the parish are at the Young Memorial campus.

Table 6. South Central Louisiana Technical College , Main Parishes of Student Origin, Enrollment, Awards, 2013

SCLTC Total Enrollment = 2,885	Enrollment Home Parish of Student	Percent Total Enrollment from Parish	Credentials Awarded, 2013		
			Diploma	Certificate	Assoc.
<i>St. Martin</i>	474	16.4	1	3	
St Charles	466	16.1	9	10	23
St John	402	13.9	16	32	23
Lafourche	257	8.9	31	39	12
St James	232	8.0	8	17	4
<i>Jefferson</i>	187	6.4	6	6	11
St Mary	91	3.1	50	71	6
<i>Orleans</i>	77	2.6			
<i>Tangipahoa</i>	58	2.0	4	7	4
Terrebonne	49	1.6	5	2	4
Assumption	44	1.5	11	14	6

Source: Louisiana Board of Regents; Parishes in italics are not included in the study area of this report.

¹¹ The list of parishes is not exhaustive but shows over 80 percent of all enrollments at SCLTC.

¹² These data do not include dually enrolled high school students.

Community Colleges: Three community colleges related to this study resolution provide educational services to all or part of the study region. They are South Louisiana Community College (SLCC), L.E. Fletcher Technical Community College (FTCC) and River Parishes Community College (RPCC). SLCC's main campus is in Lafayette Parish, but it also maintains a small campus in Franklin. SLCC recently merged with Acadiana Technical College. L.E. Fletcher Technical Community College has a new main campus in Schriever and its original campus is in Houma. The college generally serves the same area as SCLTC. River Parishes Community College in Ascension Parish serves the parishes along the northern boundaries of the study region. All are SACS-accredited institutions.

In the 2012-2013 academic year, the three colleges enrolled 13,526 students. SLCC enrolled 7,458, Fletcher enrolled 2,502 students, and RPCC enrolled 3,566 students. River Parishes Community College recently absorbed the Ascension campus of South Central Louisiana Technical College. This allows River Parishes Community College to offer a range of technical and occupational programs as well as academic transfer programs. Fletcher, as a technical community college, also offers transfer programs and an array of technical programs, including electrician, mechanical technologies, marine related technologies, automotive technology, nursing assistant, ASN Nursing, Practical Nursing, Cardiopulmonary Care Science, and welding. In addition, Fletcher operates the Integrated Production Technologies program that is dedicated to training for maritime occupations, petroleum refinery and production manufacturing operations.¹³ SLCC, in recently merging with Acadiana Technical College, also offers an array of technical programs (diplomas and certificates) as well as associate degree and academic certificates.

As the largest community college of the three, SLCC also awarded the largest volume of credentials among the three colleges. It awarded 1,609 credentials in a broad range of fields, from communications technology to construction to business management. In terms of output in programs, SLCC looks very much like its larger comprehensive community college counterparts in urban areas of the state and nation. The college awards over half of its credentials in just three fields -- health, liberal arts/general studies and business management. Two other large programs are in precision production and engineering technologies. SLCC operates and maintains a building in Franklin. SCLTC is collaborating with SLCC to move the Work Ready U program to this building in January 2013.

Fletcher and RPCC award far fewer credentials than SLCC, and those awards were in a much narrower band of programs. Fletcher awarded 462 credentials in 2012-2013 academic year, with over half of those being certificates. About a third of all the awards granted by Fletcher were associate degrees. For its part, RPCC awarded just 272 credentials and half of all its awards were in liberal arts and general studies. It suggests a clear emphasis on student transfer to four-year colleges. RPCC, like the SCLTC River Parishes campus in the area, operates a process technology program (PTEC). It accounts for the relatively large number of engineering technology credentials awarded to students by the community college.

¹³ The college and LCTCS recently submitted a proposal to designate the IPT program as a Board of Regents' Center for Workforce Excellence

Tables 7a-c below show the credential awards for each community college in different program areas.

Table 7a. South Louisiana Community College, Programs of Study, Credentials Awarded, 2013					
CIP 2 Digit Code	Field of Study	Diploma	Certificate	Associate Degree	Totals Awards
10	Communications Technology	4	0	4	8
11	Computer and Information Technology	23	7	11	41
12	Personal and Culinary Services	38	15	9	62
15	Engineering Technologies	25	5	52	82
19	Family and Consumer Sciences	4	2	5	11
24	Liberal Arts, General Studies	0	142	178	320
41	Science Technologies	21	24	0	45
43	Homeland Security, Criminal Justice	0	9	0	0
46	Construction Trades	28	11	0	39
47	Mechanical and Repair Technologies	145	85	6	236
48	Precision Production	60	68	0	128
49	Transportation and Material Handling	0	7	0	0
51	Health Professions	139	203	50	392
52	Business, Management, Marketing	118	78	33	229
Totals		605	647	357	1,609
Source: Louisiana Board of Regents, 2013.					

Table 7b. L.E. Fletcher Technical Community College, Programs of Study, Credentials Awarded, 2013					
CIP 2 Digit Code	Field of Study	Diploma	Certificate	Associate Degree	Totals Awards
15	Engineering Technologies	3	25	20	48
24	Liberal Arts, General Studies	0	139	44	183
43	Homeland Security, Criminal Justice	0	22	0	22
46	Construction Trades	15	13	0	28
47	Mechanical and Repair Technologies	9	16	13	28
48	Precision Production	4	12	0	16
51	Health Professions	9	14	22	45
52	Business, Management, Marketing	0	56	36	0
Totals		40	265	157	462
Source: Louisiana Board of Regents, 2013.					

Table 7c. River Parishes Community College, Programs of Study, Credentials Awarded, 2013					
CIP 2 Digit Code	Field of Study	Diploma	Certificate	Associate Degree	Totals Awards
13	Education	0	0	4	4
15	Engineering Technologies	20	13	43	76
24	Liberal Arts, General Studies	0	47	89	136
47	Mechanical and Repair Technologies	0	2	0	2
48	Precision Production	1	8	0	9
49	Transportation and Material Handling	0	7	0	0
51	Health Professions	23	0	0	23
52	Business, Management, Marketing	9	6	7	22
Totals		53	76	143	272

Source: Louisiana Board of Regents, 2013.

Of central interest in this report is whether there is a need for greater community college services and how that need is met in the Greater St. Mary Parish Area. One way to address the first part of that question is to look at the distribution of students' parish of origin across the colleges and to identify areas that appear to be underserved.

Appendix A contains Tables 8a-c which show parish of origin and enrollments and degrees awarded for each of the three community colleges discussed. Generally, higher proportions of enrollments come from the parishes immediately surrounding the major campus of each community college. For example, RPCC and FTCC both draw over 70 percent of their enrollments from the two parishes that are nearest their home locations. RPCC draws 73 percent of its students from Ascension and St. James parishes. FTCC draws 72 percent of its students from Terrebonne and Lafourche. SLCC, on the other hand, draws students from a broader range of parishes; only 35 percent of its students come from Lafayette parish where the college is located.

Yet in each of these colleges, the proportion of students coming from St. Mary Parish and other parishes in the study area (beyond those mentioned above) is relatively low. At SLCC, roughly 1 percent of the students are from the seven parishes in the study area. At RPCC, roughly 23 percent of its students come from the seven parishes. At Fletcher, while the large majority of students come from Lafourche and Terrebonne, the other parishes in the study area account for just another 7 percent of total enrollment. St. Mary Parish residents have the lowest enrollment at all of the colleges. Students residing in that parish represent much less than one percent of the SLCC enrollment and roughly one percent at FTCC and RPCC. With population of over 54,000 residents in St Mary Parish, enrollment in area community colleges seems especially low.

Table 9 is a summary of enrollments and credentials awarded from student parish of origin for those parishes in the study region from all the community colleges *and* from SCLTC. The seven parishes sent 4,400 students to all four colleges in 2013, roughly 28 percent of the 16,414

enrolled students at the four colleges. Almost half of the 4,400 students originate from two parishes, Terrebonne and Lafourche. Both parishes surround the main campus of FTCC. For its part, St. Mary Parish sends only 131 students to all of the colleges, or less than one percent of total student enrollment at the four colleges.

Total Headcount Enrollment, all four colleges = 16,411	Enrollments by Home Parish of Student	Credentials Awarded, 2013		
		Diploma	Certificate	Associate
Assumption	365	15	19	15
Lafourche	954	46	134	67
St Charles	534	9	17	26
St James	663	9	26	13
St John	568	22	35	30
St Mary	131	62	93	14
Terrebonne	1225	27	157	93
Totals	4440	190	481	258

Source: Louisiana Board of Regents, 2013 Note: Awards and enrollments are for the same year and do not represent cohorts of students.

St. James and Assumption parishes, with low populations for the region, show the lowest yield of either diplomas or associate degree awards from the colleges described here. Data on students from St. Mary Parish show few associate awards and somewhat higher numbers of diplomas and certificates. SCLTC awarded three quarters of those diplomas and certificates and half of the associate degrees. That means that residents from these parishes show low participation in community college education, even when enrollments from the colleges are combined. These data suggest that residents of the Greater St. Mary Parish Area are underserved by the postsecondary facilities described in this report.

Key Points Emerging From Interviews

FutureWorks interviewed a cross section of business leaders, business and civic organization leadership, and educators in the Greater St. Mary Parish Area. Questions focused on the need for educational services, current service delivery, and opportunities to increase wealth in the region. One theme from the interviews was the variation among the parishes and in different parts of the region by population, socio-economic characteristics, and employment. Another variation was relative access to postsecondary education.

Our interviews consistently spoke of the pressing current and future demand for skilled workers in all segments of the oil and gas industry. Employers from oil and gas said they have difficulty filling a wide range of open positions at their companies, from administrative positions to skilled crafts workers to engineers. Many of these same employers said they have aggressive plans for growth, and the biggest inhibitor to their growth is the capacity to grow their workforce. Legislators said that there is considerable pressure for growth of industry in the near- and long-

term, with plans from companies to build dozens of new oilrigs and expand their on- and offshore presence in the area. They want their region to produce enough skilled workers to keep companies in the area and accommodate growth. Legislators we interviewed also expressed a deep desire to fill job openings with local residents as way to build wealth in the region. For their part, college leaders confirmed this demand for workers. They said that employers come to them with high levels of need for a workforce that is skilled and credentialed, from workers in the skilled crafts to engineers to maintenance and repair.

Many of the leaders we interviewed recognized the important and complementary role that each educational institution plays in the region to meet this demand. College personnel and employers described a number of unique partnerships that have developed with companies at each institution and campus. One of those noted are the relationships that Fletcher TCC created with companies in its area to offer technical one- and two-year degrees that meet demand. One such program is with BP. Fletcher TCC has had a six-year partnership with BP that recently led to a \$4 million investment by the company to construct a new Integrated Production Technologies (IPT) facility at the college's Schriever campus. The program trains workers in competencies that lead to an Associate of Applied Science Degree in Integrated Production Technologies and certification training in Medic First Aid and PEC. The college and LCTCS recently submitted a proposal to designate the IPT program as a Board of Regents' Center for Workforce Excellence.

College personnel and employers also described the unique relationship with companies that occurs at the Young Memorial campus of the SCLTC. In particular, our interviews noted a significantly close partnership that exists between the technical college and industry through the college's Marine/Oil and Gas program in Morgan City. Employers have contributed substantial equipment, built and equipped whole buildings with the latest technology, and provided funds to help develop the training programs required by industry. And, as others noted, that same level of employer connection and commitment exists at SCLTC's River Parishes campus. For example, the technical college at River Parishes offers a Process Technology program that focuses on operations and process technologies for power plants and petrochemical refining. Our interviews noted that industry offers scholarships, internships for workers, and has donated a significant amount of equipment and funds to support the program. College personnel told us that similar employer commitment exists with its Industrial Instrumentation and Industrial Maintenance programs as well.

Overall, our interviews placed a high premium on maintaining existing relationships with industry. These same people said that any changes made to better meet industry demand must also preserve the integrity of existing relationships between educational institutions and industry. A concern expressed in many of the interviews was the potential of losing those relationships and losing the quality of technical education—especially in the oil and gas industry---if the institutional landscape changed dramatically to emphasize or focus more exclusively on academic-oriented education.

Even with all of these programs, employers noted that the local production of skilled workers is not able to keep up with their demand. Educators want to increase their capacity so they can be even more responsive to employer demand and help residents skill up, get a job, and earn more

income for their families and community. Legislators expressed a desire to maintain existing relationships with industry while also increasing resident access to educational services.

One area of inquiry in the interviews was how best to provide a wider range of opportunities for residents in the Greater St. Mary Parish Area. College personnel and legislators noted that there appears to be a relatively small number of residents from parts of St. Mary Parish who enroll and complete technical and general education programs. A number of those we interviewed had questions about how to increase the current matriculation of residents in programs offered at the Franklin extension of the SCLTC and Franklin campus of SLCC.

Another area of focus was access to education. Elected officials reported that access by residents in their districts was difficult because of the problems of the cost and capacity for transportation. And, in the St. Mary Parish town of Franklin, the access to either SCLTC or SLCC courses was limited and did not adequately address the postsecondary needs of the residents. In part, that is because it is difficult for the colleges to sustain the courses or to provide investment in technical programs. Moreover, as we were told, budget considerations for the colleges often meant that courses and programs at satellite campuses would be curtailed even if enrollments were robust. Business leaders and elected officials from these areas wanted to increase access to education through a more permanent set of educational services. Finally, some noted the number of community colleges (SLCC, FTCC, and RPCC) that were offering courses and programs in addition to SCLTC. Many of those we interviewed acknowledge that this appeared to cause inefficient (at times duplicative) allocation of resources and otherwise limited the ability of the colleges to deliver services in an area like Franklin. These same interviewees noted that a more “rationalized” set of services was needed to increase the access to and quality of educational services across the region.

Many of our interviews, including college personnel, also noted that it has become increasingly difficult to sustain financially the full breadth of educational programming and support services needed at the technical college level. That makes building new educational capacity within existing structures even more complex. In part, the squeeze on technical colleges is because of the current funding structure for higher education. On the one hand, a recent infusion of new capital funding through legislation like ACT 360 has made it easier to make some long needed capital improvements at the area’s technical and community college institutions. On the other hand, as a number of our interviews noted, the relatively low student tuition reimbursement rates for technical college programs make the margins to operate them very thin. As one person said, “it is one thing to build buildings for programs and another to operate them.” College personnel and other educators noted that it will become increasingly difficult for a technical college to sustain offerings in general education and in some technical areas unless the technical college gets direct operating support from employers and private partners.

In fact, several of our interviews suggested that the technical college model, long a feature of Louisiana education, was quickly becoming financially unsustainable. South Central Louisiana Technical College is one of two stand alone technical colleges remaining in the state. Over the last several years, many technical colleges have merged in order to offer a broader array of courses and thereby access revenue streams previously unavailable to technical colleges.

Some among the college personnel we interviewed also noted that increased collaboration between Fletcher TCC and SCLTC campuses is one way to address these challenges in the short term. That is, there might be opportunities to bring some of Fletcher's general education course content and instructors to offer courses in underserved areas of the region. SLCC also said that it was open to offering more educational services in the western portions of St. Mary Parish, if there was enough demand.

A number of business, education, legislator, and civic leaders stressed that they want to keep the flexibility and access to quality technical education, while also making more seamless the transition between technical education and other credentialing. Some in our interviews noted a gulf between 'occupational' and 'academic' education, and they expressed a desire for better articulation between workforce, technical, and two- and four-year programs and institutions in the area. Legislators and other civic leaders we interviewed want better articulation across institutions, too. They want residents to leverage and articulate their credentials so they can build better careers and incomes.

Some we interviewed also noted that employers have a role to play in increasing the retention and completion rates of students getting credentials in the area. Many in our interviews lauded the actions by some employers to increase their commitment to hiring credentialed students. It was noted that BP did this and it has driven demand from students and helped with program retention. Others noted that the industry as a whole needs to send clearer signals to the labor market as to the value of a postsecondary credential, whether that is through incentives given to students graduating from high school to enroll and complete a degree or to their incumbent workers to do the same thing.

Recommendations

This section of the report offers recommendations to increase community college services in the Greater St. Mary Parish Area to meet the growing workforce and credential needs of the region's companies, its economy, and its people. The recommendations are based on an analysis of regional industry demand and labor market demographics, a review of programming among the four sub-baccalaureate colleges serving the region, and qualitative research gathered through interviews and focus groups with leaders in the Greater St. Mary Parish Area. Key highlights from the findings of this research include:

- Residents of the seven parish region have low educational attainment overall and residents of St. Mary Parish have a combination of particularly low rates of educational attainment and household incomes.
- The oil and gas industry has a dominant presence in the Greater St. Mary Parish Area and there is tremendous demand for skilled workers in all segments of the industry. The industry also has relatively high wages.
- Program and services at the three sub-baccalaureate colleges in the region are strongly focused on meeting the needs of and serving students going into oil and gas, offshore operations, and petrochemical services. According to interviews, demand for these programs will likely increase.

- However, total enrollment and outcomes in other fields of study and programming is small at the colleges. Moreover, the proportion of students from St. Mary Parish and some of the close-by parishes attending these colleges is a small fraction of total enrollments and credentials awarded.
- At the community colleges and technical college in the area, the number of awards of academic diplomas, certificates and associate degrees is a very low proportion of enrollment. The completion rates need to be increased.
- Most of the leaders interviewed recognize that it is unlikely that the state will establish a new college in the region to address the needs of industry and residents. Moreover, the finances underlying all of higher education make it increasingly difficult for technical colleges to deliver general education and occupational programming over the long term.
- There is healthy and real interest among educators to increase collaboration and identify practical means to extend college services to underserved areas in the region.

In summary, our analysis suggests that portions of the seven-parish area are under-served by sub-baccalaureate college services. The region needs to increase access to educational facilities, the participation of residents in education, and overall rates of college completion and educational attainment. In addition, our analysis underlines the importance of continued focus on services related to the oil, gas, and petrochemical industry and, as such, that education must remain responsive to this key economic driver in the region. Finally, our analysis suggests a short-term need for greater access to a wider range of educational services in St. Mary Parish and other parts of the region. Our analysis also suggests a need for a long-term solution that will sustain these educational services as well as support and build the contributions of technical education.

The following recommendations reflect this analysis.

1. We recommend that educational leaders in the region plan for a long-term process to merge SCLTC and FTCC. It is clear that there is substantial overlap in programming, regional services, and focus between the two colleges (and RPCC). The merger should be a very deliberate process. Other mergers between technical colleges and community colleges have demonstrated high variability in the ease of the mergers and the outcomes based on planning, speed of the mergers, leadership, and the cooperation of faculty and staff. We urge pacing the merger process to ensure maximum likelihood of success in each one of these areas. Because there is considerable room for collaboration between the two institutions right now, and because existing leadership in both colleges is in favor of collaboration, there is no strong urgency to effect a full merger too quickly. We recommend a planning timeline of two years for a full merger.
 - a. As part of this merger, we recommend transitioning to a single SACS accreditation. While the reporting requirements and standards that colleges are required to maintain with COE accreditation are more attuned to occupational programs and occupational outcomes, and are thus important metrics for technical education, it also seems that maintaining two different reporting systems is burdensome and inefficient. However, some of the data now required by COE—such as placement and labor market information—should become part of the new data collection and student information system.

- b. We also recommend a clear plan for professional development to migrate the SCLTC faculty and personnel into SACS compliance. Throughout the merger process, it is important to recognize the value and contributions both institutions can make to a newly integrated mission. We do not believe that qualifying the faculty to meet SACS' faculty credential requirements is a significant obstacle or potential threat to their continued employment.
 - c. Finally, we recommend several areas of collaboration and partnership between the two colleges that could enhance community college-type services in the Greater St. Mary Parish Area *before* executing a merger of the two institutions. These recommendations are detailed in 2 through 5 below.
 2. While the River Parishes campus of SCLTC is relatively close to River Parishes Community College, we recommend that the River Parishes campus of the technical college remain with Young Memorial and the Lafourche campuses in a merger with Fletcher. That is mainly because the programming for the oil and gas industry at the River Parishes campus, such as the PTEC program, is so important to the region and has extremely strong support from the industry.
 - a. We also recommend that the SCLTC River Parishes campus and River Parishes Community College collaborate more closely with their process technology programs. Over the next few years, these institutions should determine how best to serve industry needs. The role of industry in supporting the PTEC program at SCLTC's River Parishes campus, in particular, is substantial and demonstrates strong industry backing. We recommend adding resources and building additional capacity. That would further reassure industry employers that, even with a merger of SCLTC and FTCC, the region's postsecondary system is strongly committed to the industry.
 - b. We recommend that more general education and community college services be provided at the current River Parishes campus of the technical college as part of this merger. This is a long-term benefit of the merger to people close to that campus. We also recommend that Fletcher TCC begin to examine how it can offer these courses at the River Parishes campus as a beginning step to the full merger and include River Parishes Community College in discussions to ensure needs of the region can be adequately met. Residents in that area should not have to wait until officials fully execute the merger to have access to the advantages that a comprehensive technical community college can provide.
 3. We recommend that SCLTC and FTCC immediately begin to plan to offer a combined set of services in the Franklin area. That includes continued use of the facilities at Franklin High School that integrate technical programming and general education courses that will lead toward transfer or, more desirably, lead to increasing the numbers of diplomas, certificates and associate degrees in that area.
 - a. We also recommend that South Louisiana Community College work with FTCC and SCLTC to phase out offering courses in the Franklin area over the next 2-3 years. In turn, Fletcher should increase course offerings to replace those courses.

This will make it more financially viable to offer more courses in that area and to intensify the focus on collaboration between SCLTC and FTCC.

- b. We also recommend that the two colleges carry out a market analysis of the area to determine which programs and courses should be offered in the region to support business and industry beyond the oil and gas industry. This will help lay the foundation for a stronger and long-term presence in the region. Once this analysis is completed and decisions about programming made, the colleges should develop a marketing campaign in the area to increase awareness of the opportunities for education and employment.
 - c. Finally, we recommend planning to assure that students in the Greater St. Mary Area can take all or most of the courses required to complete degrees without having to travel long distances. Having local access to comprehensive sets of community college services is important to help residents, and lower income people in particular, obtain education.
4. We recommend that LCTCS, SCLTC, and FTCC engage in a process that continues to build the educational capacity serving oil and gas, marine operations, and petrochemical services. The goal should be to create one brand under the umbrella of a unified Center of Excellence, perhaps with different divisions serving each industry segment, that can meet the needs of the industry across the Gulf coast of Louisiana. The evolving center being developed at FTCC and the marine programs at SCLTC¹⁴ are major educational and economic development assets and appear to be complementary, focusing on different segments of the industry. These assets and the potential to expand their services offer a unique opportunity for collaboration among the institutions. It can also be an important signal to the industry of postsecondary education's continued commitment to the industry's growth in the region.

This Center of Excellence should include the existing Young Memorial campus Marine / Oil and Gas program, the PTEC program at the River Parishes campus, and the proposed Center for Workforce Excellence at FTCC. This will offer the industry a vertically integrated set of services that reflects the composition of the industries in the region. And, we hope it will increase the industry engagement as well as increase the potential for expansion to meet growth potential in the region. In the near-term, this Center of Excellence could be an integrated or combined operation of SCLTC and FTCC. Eventually it should become a single center in the newly merged institutions.

Shortly after the unified Center of Excellence is formed, we recommend LCTCS conduct a review of the early implementation and operations of the Center. The review should examine how the unified Center can best maintain its responsiveness to industry under the new merger.

5. Our final recommendation is to increase resources, programming, and attention on degree/credential completion at all institutions. Neither college for which we have proposed to merge, nor the other two serving the region, show ratios of enrollments to

¹⁴ An application to create a Center of Excellence at FTCC is pending before the Louisiana Board of Regents and an application to create another Center of Excellence at SCLTC is under preparation.

completions that should be acceptable to Louisianans. Moreover, employers in our interviews were asking for people with credentials. The data analyzed for this report show that the current completion rates, across programs and institutions, do not meet that ask. More college services without a requisite focus on completion are an inefficient use of state resources, do not meet the needs of industry, and will not raise incomes for the people of the Greater St. Mary Parish Area over the long-term.

Appendix A: Additional Tables

Origin and Enrollments in Community Colleges serving greater St Mary region, including degrees awarded.

Table 8a. L.E. Fletcher Technical Community College, Main Parishes of Student Origin, Enrollment, Awards, 2013					
Total Headcount Enrollment = 2502	Enrollment Home Parish of Student	Percent Total Enrollment from Parish	Credentials Awarded, 2013		
			Diploma	Certificate	Assoc.
Terrebonne	1,137	45.4	22	151	89
Lafourche	675	26.9	18	90	53
<i>St Martin</i>	114	4.5		2	3
Assumption	78	3.1		3	6
<i>Jefferson</i>	68	2.7			
<i>Orleans</i>	49	1.9	1	1	1
St Charles	41	1.6		3	
St Mary	28	1.1	2	9	3
St John	24	0.95			
St James	22	0.87		2	1
Percent of Total Headcount Enrollment		89%			
Source: Louisiana Board of Regents, 2013					

Table 8b. South Louisiana Community College, Main Parishes of Student Origin, Enrollment, Awards, 2013					
Total Headcount Enrollment = 7,458	Enrollment Home Parish of Student	Percent Total Enrollment from Parish	Credentials Awarded, 2013		
			Diploma	Certificate	Assoc.
Lafayette	2,584	34.6	142	179	190
Vermillion	926	12.4	77	51	23
Iberia	881	11.8	75	89	42
St Martin	825	11.1	40	40	33
St Landry	730	0.97	132	88	31
Acadia	470	0.63	63	46	19
Evangeline	258	0.34	46	59	1
East Baton Rouge	75	0.1		7	2
Jefferson	60	0.1		4	1
Avoyelles	53	0.07	5	10	1
(From All Parishes in Study Area)	101	1.3	10	29	7
Percent of Total Headcount Enrollment		73%			
Source: Louisiana Board of Regents, 2013; Parishes in Italics are not included in the study area.					

Table 8c. River Parishes Community College, Main Parishes of Student Origin, Enrollment, Awards, 2013					
Total Headcount Enrollment = 3,566	Enrollment Home Parish of Student	Percent Total Enrollment from Parish	Credentials Awarded, 2013		
			Diploma	Certificate	Assoc.
<i>Ascension</i>	2,208	61.9	30	49	91
<i>St James</i>	397	11.1	1	7	8
<i>Assumption</i>	236	6.6	4	1	2
<i>St John</i>	152	4.3	6	3	7
<i>East Baton Rouge</i>	137	3.8	6	4	5
<i>Livingston</i>	94	2.6	3	5	7
<i>Washington</i>	57	1.5			9
<i>Iberville</i>	46	1.2	1	1	5
(From All Other Parishes in Study Area)	38	1.0		4	3
Percent of Total Headcount Enrollment		94%			
Source: Louisiana Board of Regents, 2013; Parishes in italics are not included in the study area.					