

RESEARCH BRIEF

CASE STUDY

Community College Research Center | September 2026

From Goals to Graduation to Post-Completion Success: Why Every Student Needs an Educational Plan

CASE STUDY 3:

Using a First-Year Experience Course to Scale Academic and Career Planning at Marion Technical College

By Serena C. Klempin

Because it is a technical college, most programs at Marion Technical College (MTC) are relatively mapped out for students, without large numbers of courses from which to choose. However, few MTC students follow a traditional path, making educational planning crucial for their success. Located in a small town roughly an hour north of Columbus, Ohio, MTC serves a large farming community. The average income is significantly lower than in surrounding counties, and approximately half of students receive Pell grants. Apart from a growing population of students taking dual enrollment courses, called College Credit Plus (CCP) in Ohio, the typical student is in their mid- to late-20s and works while attending college part-time.

MTC demonstrates how a small, rural college with limited funding can leverage grants to institutionalize advising reforms and ensure all students have an individualized full-program plan connected to their career goals. By adopting a case management model, hiring more advisors, and redesigning the first-year experience course to focus on academic and career planning, MTC increased the percent of students with an educational plan from around 25%–30% to 95% in five years.

This case study is based on interviews with ten administrators and staff conducted via Zoom in May and June 2026. The sections that follow describe how MTC redesigned its first-year experience course, reformed the advising model, incorporated educational planning within larger institutional reforms, and

partnered with another community college to dramatically increase fundraising. The report also describes the promising results leaders observed after implementing these changes and offers a preview of the college's plans for continuing to advance the work.

The Road to Change

When MTC's president, Dr. Ryan McCall, joined the college in 2016, he knew it needed to focus more intentionally on student success. He repeatedly made the point that in a 100% performance-based funding state, if the college did not start making changes, it would lose money. In one example, he realized MTC was missing out on funding because it was not reporting embedded certificates to the state. Consequently, the college began automatically awarding the embedded certificates that students earned while taking courses for a longer degree program rather than making students request them. After implementing these automatic awards, MTC moved from having one of the lowest shares in certificates statewide to having one of the largest.

Two even bigger changes in 2018 laid the foundation for MTC's success in scaling educational planning: creating a new director of advising position and implementing guided pathways.

Laura Emerick, the associate vice president of student success and engagement, redesigned advising from a decentralized faculty advising model to a centralized case-management model. The old model relied primarily on faculty advisors, with two full-time professional advisors (one dedicated to nursing students and one supporting pre-health students as well as dual enrollment students seeking either an associate of arts or associate of science degree) and two part-time advisors who worked with students identified as at risk (largely determined by factors such as placement into developmental education for both math and writing) and assisted drop-in students from any program. MTC created the advising director position after the two part-time advisors retired. The case management model consists of professional advisors assigned by meta-major and is supplemented by faculty advising for students accepted into limited access programs. Given that advisors are the ones creating educational plans with students and monitoring them over time, their role in scaling planning is critical. According to an advising leader, "We had to get to case management holistic advising to implement academic planning."

In 2021, MTC received a Title III grant to support multiple aspects of its guided pathways work, including setting concrete goals and measurable milestones for scaling the number of students with individualized full-program educational plans. The grant's emphasis on educational planning clearly played a significant role in MTC's success with scaling. Overall, though, what propelled MTC's success was that the efforts to scale educational planning were part of a comprehensive redesign of advising, onboarding, scheduling, technology, and organizational structures rather than a standalone initiative.

How Educational Planning Works for MTC Students

As with most colleges that have successfully scaled educational planning, MTC embedded planning throughout the new student onboarding process. Prior to orientation, students meet individually with an advisor for a one-hour appointment. Typically, they meet with the advisor for their meta-major who will become their assigned advisor. During enrollment events or the busy period at the start of the term, MTC offers drop-in advising during which students can meet with any available advisor. Orientation allows students to explore their interests and connects students to a support network. Program directors separate students by major and take them

to their classroom space or lab with the idea of previewing “light the fire” coursework, which most students are able to take during their first term. Describing what has changed and what has remained the same about onboarding and new student orientation over the years, Emerick stressed the importance of making an initial connection with students: “We still do what we did when I came in, we actually meet with all new students individually when they first enroll, and we help them explore; we don’t do group advising. We really like that initial connection to learn student stories. It’s an important part of the rapport building and having students share their goals and barriers.”

When Emerick started in 2018, the only first-year experience course was Skills for Success, intended for dual enrollment and correctional education students. It addressed topics such as study skills, time management, and stress management, but did not cover career or academic planning in-depth, devoting only one or two class periods to this type of exploration over 16 weeks. Based on previous experience working in career services and teaching a career planning class at a different institution, Emerick had been questioning why career development was not embedded into first-year seminar courses since 2010. Often, juniors and seniors would take the career planning class as a “filler” to graduate, then wish they had taken it their freshman year. At that point she realized that “students don’t know that they need it until they’re in the course.”

While participating in the Ohio Association of Community Colleges Leadership Academy in 2019–2020, Emerick and a team of colleagues from other community colleges across the state worked on a project proposal supporting the development of a robust career exploration curriculum within first-year experience courses to ensure all students have the opportunity to explore academic and career pathways in the first semester. This project inspired Emerick to develop **FYE 1000: Academic and Career Success** at MTC. Approximately half of the course covers academic and career exploration and planning. The course first appeared in fall 2022 as a requirement for all technical degree programs (engineering, IT, business, and criminal justice). It became required for most certificates and one additional degree program, health information technology, by the 2025-26 academic year. As of the 2026-27 academic year, MTC will also require the course for associate of arts and associate of science degrees, pre-nursing as well as other pre-health students enrolled in a newly created AA/AS health pathway, and all remaining certificates except for two. Students admitted directly to some health programs will not be required to take it, but most of those students have previous college or dual enrollment credit.

MTC generally organizes FYE 1000 course sections by program area or meta-major. Whenever possible, the advisor who oversees those areas teaches the course, although enrollment patterns and scheduling constraints make it difficult for the courses to be fully meta-major focused. If the advisor cannot teach the section, another student services staff member with experience in advising, career development, academic support, or first-year programs teaches the course. Core activities include taking a career assessment, researching a career, learning about majors related to that career path, and identifying the requirements for pursuing those majors.

After taking the **Focus 2** assessment and answering reflection questions, students pick a career to research in depth using legitimate resources like the *Occupational Outlook Handbook*. They also research salaries and complete a budgeting assignment to make sure the salary will give them the life they want given the cost of living in their region.

Focus 2 Career Assessment Reflection Questions

1. What is your overall impression of the FOCUS assessment? What did you find most helpful? What did you discover about yourself and/or how did the assessment results confirm what you were already aware of or thinking about when it comes to careers?
2. Look at your results from the “Am I Career Ready?” survey. This survey is based on the National Association of Colleges and Employers (NACE) professional competencies—the top skills employers are seeking in new hires. These competencies/skills are considered “transferable skills” because you can gain and develop them in many different settings, and they are not specific to one career.
 - a. In what areas did you score the highest? Give some examples of places you have demonstrated these skills in past experiences in school, work, community, etc.
 - b. What areas do you need to develop most? How might you approach developing these skills while you are in college? For example, if you scored the lowest on “teamwork,” what are some ways you can improve in that area and/or find opportunities to practice?
3. Look at your results from the “Work Interest Assessment.” What is your Holland Code? Do you agree with the descriptions? Why or why not? When reviewing the website on Holland’s Codes in the module, were there other types that you thought would be in your top three/Holland Code?
4. Look at your Self Assessment results, both individually and combined. What themes, if any, are present in the list of occupations you received? What types of majors fit with these occupations? Which of these careers do you feel would be a good fit for you and/or are there any careers you would like to investigate further?
5. Select one occupation that appeared in your results that looks interesting to you by clicking on the link for that job. What job did you select? What is appealing about this occupation? How do your work interests compare to the “typical” person in that occupation (look at the “Work Interest Profile”)? What skills or values are relevant to this job that match your profile?

In addition to the career exploration assignments, students must meet with their assigned advisor to build a complete educational plan. Before doing so, students are responsible for researching their field and their program to learn such information as the total number of credits, options for embedded certificates, and transfer pathways. During the meeting, students review this information with their advisor, then begin creating an academic plan. MTC currently uses Watermark for planning but is in the process of transitioning to Colleague Student Planning.

Dual enrollment students take the same FYE 1000 course as college students but receive alternative assignments. For example, if they are not planning to attend MTC after high school, they complete the educational planning assignment by selecting a program at another institution and identifying courses that would apply to that program. As of fall 2026, the college requires dual enrollment students to take FYE 1000 if they have completed 15 credits and intend to continue taking dual enrollment courses at MTC.

Academic Planning Worksheet

To get familiar with your selected program of study or program of interest, review the [Academic Programs](#) section of the MTC website to learn more about the major, degree requirements, and other opportunities available within the program. Use the information you can find on the website plus your readings for this module to answer the following questions *in your own words* (do not just copy and paste from the website or textbook). You must have this assignment complete prior to your advising appointment, but you will also have the opportunity to revise it following the meeting. Please bring a completed copy of this worksheet to your advising appointment or email it to your advisor in advance.

CCP [dual enrollment] alternative: If you are a CCP student and you do not plan to attend MTC after you graduate from high school, you may research a major of interest at an institution you plan to apply to. Please select a specific institution to research for this assignment, even if you are considering multiple schools.

1. What is your intended major/academic program? (CCP—please list institution if not MTC)
2. What will you learn about in this major?
3. How many total credits are required for your degree?
4. Which classes are you most excited to take and why? Are there any classes you are worried about? If so, what concerns you? (you can click on the course numbers on the Curriculum tab to read course descriptions)
5. How do the required general education classes in your major relate to your degree and/or future career field (examples: ENG 1000, COM 1400, PSY 1100, SOC 2020, etc.—your non-technical/non-major specific courses)? What knowledge or skills will you gain, and why are these important? (reflect on the connection to the course readings about general education and the NACE career competencies)
6. What certificates are embedded in your program (if any), or are there related certificates that you want to add on to your degree?
7. What external industry certifications will you be eligible for after taking specific courses, if any?
8. What experiential opportunities are required in your program (i.e., job shadowing, service learning, internships, practicums, clinicals, etc.)? At what point in your program will you take these courses? What companies/organizations might you be interested in for these experiences?
9. Are there any additional co-curricular opportunities you might want to get involved in to enhance your skill development? (i.e., work-study jobs, student organizations, study abroad, etc.) If yes, select one and explain when you plan to engage in these activities and what you hope to learn/skills you hope to gain. If not, please explain any other commitments or personal barriers that may prevent you from participating in these types of activities.

How MTC Scaled Educational Planning

Case Management Advising by Field

Prior to the advising redesign, advising for new students was very inconsistent across departments. During the first phase of the advising redesign, starting in July 2018, professional advisors conducted intake and provided initial advising services for new students. With only two full-time advisors and a director carrying almost a full-time load, the professional advisors did not have the capacity to stay

with students beyond the first year. As soon as students in non-limited enrollment programs declared a major and completed 12 credits, they received a faculty advisor. Students in limited enrollment health programs stayed with their assigned advisor until accepted into their program, at which point they switched to a faculty advisor. One of the challenges with that model was inequitable caseloads: Some faculty only had a couple of students while others had 40. Students also had inconsistent experiences with faculty advisors, as some did a better job than others of keeping up with curriculum requirements and changes.

After extensively researching effective advising practices, Emerick adopted a case-management model organized by field. MTC piloted meta-major-based advising for all new students in July 2018. In 2020, the college used a Perkins grant to hire an additional advisor. In 2022, they used a Title III grant to hire another advisor. With the addition of the Title-III funded advisor MTC had enough advisors to assign all programs a professional advisor and phase out faculty advising in non-limited enrollment programs. During the 2024-25 academic year, MTC turned a position that had been vacated during the COVID-19 pandemic and left unfilled for two years due to enrollment declines into a position for an assistant director of advising after obtaining the funds to fill it again. That same year, the college used a Rural Postsecondary Education (RPED) grant to hire a third new advisor. The RPED-funded position originally focused on transfer and students enrolled in the associate of arts and associate of science programs, but now also includes programs identified as requiring a bachelor's degree to earn a living wage. MTC still uses the Perkins grant to fund one of the advising positions. The college has absorbed the cost of the position funded by Title III and is hoping to do the same with the RPED grant.

The advising department currently consists of a director, assistant director, and four full-time advisors. The new positions allowed MTC to reduce advising caseloads to roughly 200 students, ensuring that they receive an advisor for their meta-major. Programs for advising are generally divided among advisors as follows:

- Nursing
- Healthcare other than nursing
- Business
- Criminal Justice, engineering, and IT
- Associate of arts/science, behavioral health, early childhood education, social work and addictions, and transfer (all majors)

Students seeking to enroll in limited access programs such as nursing switch to a faculty advisor after being accepted.

Strategic Use of Technology

MTC uses Watermark Student Success and Engagement (formerly Aviso) for educational plans. Because MTC was the initial beta site for Watermark/Aviso, Watermark developed a number of features based on the college's needs, including an academic planning tool the college branded as MAPS (My Advising Plan for Success). Originally, MTC used MAPS to help students navigate a mandated switch from quarters to semesters in 2012.

In the current version of the Watermark planning tool, advisors can prepopulate plans with major courses using curriculum maps available on MTC's website that outline required course sequences. Although creating full educational plans initially increased advisors' workloads, they reported that the

plans save them time helping students register in subsequent terms because they already know which courses students should take. Rather than reviewing transcripts from scratch, advisors can quickly contact students with personalized registration recommendations based on their plans. If students change their plan, Watermark sends an alert to their advisor and automatically changes the status of the plan so that advisors know to review it. Students who want to make changes or have questions can also click a button that sends an email to their advisor. In addition, Watermark sends an automated off-plan alert to advisors when students do not register for a class that is on their plan. If a student fails a class on their plan, a red “X” appears, making it easy for students and advisors to spot a course that may need to be repeated.

In mid-2026, MTC began switching to a new student information system (SIS), but Watermark remains connected to the older system, Power Campus. Starting in fall 2026, advisors will transfer the Watermark educational plans to Self-Service Student Planning within the new SIS, Colleague. Students then will be able to self-register from their plans. The transition to Colleague will also make it easier for students to see their degree audits. Colleague does not automatically send off-plan alerts, but MTC plans to run manual alerts for the time being until they can implement a new advising/case management system.

Watermark is also connected to MTC’s learning management system (LMS), although it does not integrate as well with the current LMS, Brightspace, as it did with Canvas, which the college used previously. When Watermark was connected to Canvas, it was able to import assignment-level data and send advisors alerts for issues like attendance and low grades. However, because Brightspace is already integrated with Colleague while Watermark is still integrated with Power Campus, Watermark cannot match student IDs in Brightspace. As a result, college leaders are encouraging faculty and advisors to enter alerts manually in Watermark if they see a student struggling. Due to the integration limitations Watermark has with Brightspace as well as Colleague, college leaders are currently exploring other advising/retention management platforms that will allow advisors to have access to the same information and tools they have come to rely on.

Incorporating Educational Planning Within a Broader Institutional Redesign

Starting work on guided pathways in 2018 to 2019 was an important precursor to MTC’s work on educational planning. However, according to McCall, the real work began in 2021 after MTC received a Title III grant focused on guided pathways. The grant covered redesigning new student orientation, expanding the advising department, improving the infrastructure for student support by co-locating administrative offices in a One Stop, setting goals for educational planning, developing a Connections Center offering a food pantry and other emergency resources, and better aligning academic pathways by providing Association of College and University Educators (ACUE) training for faculty and hiring an experiential learning coordinator. In addition, the Title III grant enabled MTC to make several technology enhancements, including purchasing two new systems—a customer relationship management system for admissions and event registration (such as new student orientation) and a curriculum management system—and providing professional development and training for the Watermark advising platform.

In 2022 MTC joined the Rural Guided Pathways initiative, which provided more support for the guided pathways work included in the Title III grant and let the college involve more people. Inspired by another college that delivered a presentation during the initiative, MTC created the Guiding Pathways

Steering Council to maintain the momentum for the work. The council's 15 members determine priorities and divide into three or four work groups at a time to tackle them.

Building Accountability for Meeting Goals and Milestones

Using the Title III grant to establish goals and milestones for educational planning was a driving force behind MTC's success in scaling. Before receiving the grant, only 25% to 30% of students had a fully developed educational plan in Watermark. Within five years of receiving the grant, the college achieved its goal of having 95% (not including dual enrollment students, students who are incarcerated, and noncredit students) following an approved full-program plan. An administrator noted that a key to achieving this goal was having specific performance goals. Additionally, Watermark reports students without approved plans, giving departments frequent opportunities to close gaps and steadily increase implementation.

Another administrator echoed how important it was to have those milestones. "Once we got approved for the Title III grant, the college was able, through that grant, to hire a director of the grant itself," said the administrator. "He really kept us on track with our milestones. He had other metrics that he was meeting as part of that, but that was his full-time job was to make sure that we met those metrics."

Sustaining and Improving the Model

MTC's work on guided pathways and educational planning would not have been possible without its partnership with Columbus State Community College (CSCC). After three unsuccessful attempts applying for a Title III grant, MTC contracted with CSCC to provide grant services, including grant writing and some technical assistance with grant administration. As a result, MTC received not only a \$2.2 million Title III grant but also six National Science Foundation (NSF) grants, which the college had never received, and an RPED grant. Altogether, MTC has received \$15 million in grants, averaging around \$3 million a year. The initial contract with CSCC was for less than half of what the college would have had to pay a full-time grant writer. Given the return on investment, the board recently approved increasing the payment. To manage the challenge of maintaining resources and staff positions obtained through grants, MTC intentionally approaches grants as long-term investments in student success. McCall explained that "from the time that we started, we said the idea is that if we make these changes, we're going to gain students and we're going to gain revenue from the state, which will allow us to keep these positions."

MTC's work on guided pathways and efforts to scale educational planning are paying off. A professor of mathematics, who was a member of the Title III data team, evaluated the impact of taking FYE 1000 and found that students who completed the course were significantly more likely to persist to the next term than those who did not. In addition, the part-time retention rate has significantly increased. When MTC started the Title III grant in September 2020, the retention rate for part-time students, who represent three-quarters of the student population, was around 25%. By the end of 2025, the retention rate for part-time students was 63%, only four points below the rate for full-time students (67%). Finally, over the past three years, MTC has gained over \$3 million in state subsidies, giving the college over \$11 million due to increases in course completions (resulting from increased enrollment) and in the number of certificates awarded.

MTC has made impressive strides with educational planning and has identified several ways to continue enhancing planning. For example, one of the Guided Pathways Steering Council work groups

is tackling student-driven scheduling. With the aim of making the schedule work better for students, the work group is redesigning program maps based on full-time attendance for students attending part-time. In addition, the college is developing three-year schedules.

MTC is also considering other ways to improve the educational planning process. Leaders have discussed building plans for dual enrollment students and incarcerated students. To improve transfer planning, MTC is identifying preferred transfer partners with which the college could develop 2+2 or 3+1 advising maps. While the Focus 2 career assessment is presently embedded in MTC's first-year experience course, an administrator has proposed moving the assessment even earlier, requiring students to take it before students register and meet with an advisor. An advising staff member also mentioned that it would be helpful to have a tool that can identify when classes are only available in certain terms, a function Watermark does not offer. Without it, advisors must memorize which classes are offered when.

Conclusion

In many ways, the issues and challenges facing MTC were similar to those confronting other small, rural colleges: limited finances, over a decade of enrollment declines, and a dramatic shift in the student population following sharp increases in dual enrollment. To address those challenges, MTC leveraged partnerships and grants to redesign the student experience with an emphasis on setting up students for post-completion success from the start through intentional academic and career exploration and planning.

Several factors were key to the college's success in scaling full-program, individualized educational plans: building a strong advising foundation through adopting a case management model, incorporating educational planning into institution-wide guided pathways reforms, designing the first-year experience course around academic and career planning, and using grants not only to set concrete, measurable goals for scaling educational planning but also to build capacity for sustaining the work over the long term.

Funding for this research was provided by Ascendium Education Group.

