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OFFICE OF INSTITUTIONAL
RESEARCH AND ASSESSMENT

ENVIRONMENTAL SCAN

External Scan | Michael Oertel

Environmental Scan- External
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Executive Summary

An environmental scan of both the external and internal environment was conducted by the Office of Institutional Research and Assessment during the summer of 2014. The underlying objective of the Environmental Scan was to analyze information about factors or phenomena that could affect the university's ability to uphold its mission and achieve its vision. Information extracted from the environmental scan will be used to administer a SWOT analysis, as well as to help create strategic objectives.

1. Political, Legislative, and Regulatory

- a. Health care and social security are expected to increase to a total of 14% of GDP. Educational related services will decrease to 7% of GDP, well below the 11% average we've enjoyed the past 40 years.
- b. The Dream Act, which would have allowed undocumented students access to federal aid, was dismissed in congress.
- c. The California Dream act, which was upheld by the California State Supreme Court, will allow undocumented students in the state of California access to state aide. However, there is still some uncertainty over whether or not a state has the constitutional power to circumvent the federally mandated IIRIR act.
- d. The state of California allocated nearly \$15 billion to higher education before the recession. Post-recession, that number dropped to \$10 billion. Higher education as a percentage of the total California State budget was at 10% before the recession. Post-recession percentage sits at 8%.
- e. Total Pell expenditures have increased 118% since 2002-2003.
- f. The number of Pell grants awarded has increased 83% since 2002-2003. However, since 2010-2011, the maximum Pell grant awarded and the average Pell grant awarded per recipient have both decreased. That being said, the percentage of tuition and fees covered by the Pell grant has decreased.
- g. In 2007-2008, 3 students at UWest received Pell grant aide. In 2013-2014, that number increased 113% to 37 students.
- h. In 2009-2010, 1 student at UWest received CAL grant aide. In 2013-2014, that number increased 227% to 19. Of the 19 who received CAL grant aide, 3 were undocumented students.

2. Economic Summary

- a. The state of California has one of the highest unemployment rates in the country (8.9%).
- b. Los Angeles County has one of the highest unemployment rates in the state of California at 9.9%.

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- c. East Los Angeles CDP has the second highest unemployment rate in Los Angeles County at 12.6%.
- d. Health care and social services (3%), Educational services (2.3%), and Professional and Business services (2.1%) are projected to be the three fastest growing professions in the United States.
- e. In the state of California, the demand for Marriage and Family Therapists is expected to increase nearly 40%.
- f. In Los Angeles County, Biomedical Engineers (60%), Helpers (50%), and Home Health aides (49%) are projected to be the three fastest growing occupations.
- g. Of the 20 fastest growing occupations in Los Angeles County, only one occupation requires a doctoral degree; 5% require a master's degree; 20% require a bachelor's degree; 10% require an associate's degree.
- h. 55% of the fastest growing occupations in LA County require only a high school diploma.

3. Social and Demographic

- a. At the national level, the Hispanic population is expected to grow 17%, and the Asian population is expected to grow 30% by 2020.
- b. The populations of both the state of California (9%) and LA County (6%) are expected to grow faster than the national average.
- c. In the state of California, the Hispanic population is expected to grow by 18%; however, the white population is expected to decrease by 1%.
- d. By 2020, the Hispanic population will be the largest population in the state of California.
- e. In LA County, the Hispanic population is expected to grow by 25%, and the white population is expected to decrease by 12%.
- f. By 2020, the Hispanic population will represent 53% of the total population, and the Asian population will represent 15% of the total population in LA County.
- g. In 2012-2013, there were 819,644 international students in the United States. Of the total number of international students in the U.S., 29% were Chinese.
- h. Of the 10 countries that contribute the most international students to the U.S., 6 of them are Asian countries.
- i. Kuwait, Saudi Arabia, Iran, China, and Brazil are the top 5 fastest growing international student populations in the United States. Four of the five countries listed above are net oil exporters.
- j. Today, there are more international students enrolled in bachelor level degree work than at the master's level.
- k. In 2012-2013, the state of California hosted 111,379 international students, or 14% of the total international student population in the U.S.
- l. 16% of the total number of international students in California is studying at USC and UCLA.

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- m. 2.2% of the total number of international students in the United States is studying at USC and UCLA.
- n. Primary source of funding for international students come from family and relatives (63.6%); 21% of funding comes from U.S. college and universities.

4. Technology

- a. In 2002, 1.6 million students were taking at least one MOOC course. By 2011, that number increased to 6.7 million.
- b. In 2011, 32% of the total number of student's enrolled in the U.S. was enrolled in at least one on-line course.

5. Educational Summary

- a. Degrees in the health professions, biology and biomedical sciences, and visual and performing arts were the fastest growing degrees conferred since 2000.
- b. Nearly 367,000 business degrees were awarded in 2011-2012, making it the largest segment of degrees conferred.
- c. Employers prioritize critical thinking, communication, and complex problem solving skills over a job candidate's major field of study.
- d. A majority of employers believe that an ideal employee should possess industry specific knowledge and skills, as well as a broad range of knowledge and skills.
- e. Employers believe that the higher education system does a good job in preparing recent graduate for entry level positions, but not a good job in preparing them for advancement.

Political, Legislative, and Regulatory Summary

The political landscape of the United States has been overwhelmed and dominated by the recent financial recession. The United States and the world economy are beginning to rebound from this terrible situation, but the American national budget continues to balloon drastically out of control. Immigration reform is still dominating the news, but both parties are still split over how to approach this delicate issue. The American people are demanding a balanced budget; however, how to balance the current budget is being dominated by party lines. The cost of higher education continues to increase on an upward trajectory that does not parallel average income. As the national government, as well as state governments, allocates more money to support student expenditures, this will inevitably add to their current budget deficits.

Highlights:

- Federal spending on health care and social security will begin to eat up a larger share of the national budget. In fact, 14% of the national budget will be earmarked for social security and healthcare. As a result, funding for education will be decreased to an all-time low of 7% of GDP since the 1930s. In addition, higher education as a percentage of the total state budget will decrease to 8%.
- The California State Supreme Court upheld the California Dream Act. By doing so, undocumented students in the state of California may access state granted aid towards higher education. However, the Dream Act at the federal level has been stalled three times already and there are no signs of the bill being rejuvenated. Additionally, we are still unsure if the state of California has the constitutional power to circumvent the federally mandated IIRIR act of 1996.
- The Student Loan Forgiveness Act was submitted in 2012. It did not pass but there seems to be growing momentum towards passing this bill in the near future. This act, if passed, would cap interest rates on student loans, allow students to refinance their loans, and allow students to convert their private loans to federal loans, which they can then consolidate under the DOE. As of right now, recent graduates can consolidate their federal loans under the DOE. This includes subsidized and unsubsidized loans. The problem is that students are now forced to take out more private loans to offset the inadequate amount of federal loans be disbursed to pay for their tuition.
- Total Pell Grant expenditures has increased 118% in the past decade. This is mainly due to the increasing number of applicants and recipients. That being said, the average

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amount awarded per student and the maximum amount awarded per student have decreased. The percentage of tuition and fees covered by the Pell Grant has also decreased. The number of Pell Grant recipients at UWest has increased 113% since 2007-2008.

- The amount of CAL Grant aid allotted has increased astronomically since 2000. In 2012-2013, 13% of the total number of CAL Grants awarded was given to Los Angeles County residents. In 2009-2010, only one UWest student received CAL Grant Aid. In 2013-2014, 19 UWest students received CAL Grant Aid, which is a 227% increase since 2009-2010. More importantly, of the 19 students that received CAL Grant Aid, 3 of them were undocumented students.
- Federal unsubsidized loans increased 223% and Federal Stafford loans increased 27% since 2000-2001. Unsubsidized loans begin accruing interest while the student is still enrolled; however, congress sets the interest rate. Unsubsidized loans can be consolidated under the DOE, and payment plans are tied to gross income.

Environmental Sector: Political, Legislative, and Regulatory

External Force/ Issue: General Themes in Legislative Activity

Key Trends:

National

- The national debt continues to be a focal point of focus for both the President and the Republican controlled congress. Policies regarding how to balance the current national budget will shift in favor of the Republican Party.
- The next Presidential election will take place in 2016. Skeptics are worried that if the Republican Party takes over the oval office and congress, higher education will be one of the first items slashed.
- Federal spending on major health care programs and social security is expected to increase to a total of 14% of GDP by 2038, twice the 7% average over the past 40 years. In contrast, total federal spending on everything other than health services and social security (education included) will decline to 7% of GDP, well below the 11% average of the past 40 years and a smaller share of the economy than at any time since the late 1930s.
- Confidence in our President and congress's ability to come to a compromise on the federal budget is declining, and political affiliation is becoming more polarized. A polarized system makes it very difficult for both sides to come to an agreement on how to balance the budget.
- Under current policies, the national debt is expected to decline over the next 5 years; however, it will steadily increase again in 2019.
- The 1996 Illegal Immigration Reform and Immigrant Responsibility Act (IIRIR) and the Personal Responsibility and Work Opportunity Reconciliation Act prevented undocumented students from receiving any type of federal funding.
- In 2003, a bipartisan congressional committee drafted the Student Adjustment Act, which would have allowed certain states to decide on whether to offer in-state tuition rates and state funded aid to undocumented students. This act was stalled in congress and there are no signs of life left in this proposal.
- The Dream Act, which would have allowed undocumented students access to in-state tuition and state funded aid, was dismissed in congress.
- There are no signs of a bi-partisan act that would allow undocumented students access to federal funding in the future, and there is still uncertainty about whether or not the

Environmental Scan- External

state has the constitutional power to bypass the IIRIR and allow undocumented students access to in-state tuition and state funded grants.

- STEM act of 2013: Allocate visas to international students that have graduated from a STEM program. Preference will be given to PhD students. Acts seems to have bi-partisan support and it is expected to be passed soon.

State

- The recent recession had a dramatic effect on the national and state budgets. State budget cuts were felt across the board and state funding for education felt the squeeze. Before the recession, California State allocated nearly \$15 billion dollars towards higher education; in 2012, that number decreased to \$10 billion dollars. Recently, the higher education budget has increased to \$12 billion dollars, but still not near the pre-recession amount.
 - Higher education as a percentage of the total California state budget was at 10% before the recession. Post-recession percentage is at 8%.
 - In 2010, the California State Supreme court upheld the California Dream Act. This act allows undocumented students access to in-state tuition and state funding.
 - Under the current administration, state funding for public universities will be tied to graduation rates and elapsed time to degree.
 - State funding for community colleges will be tied to student success indicators. More importantly, innovative ideas on how to improve achievement of underrepresented student groups.
 - **Strengthening the Safety net:** California is one of the most proactive states when it comes to providing funds to those in dire need. Compared to other states, California provides broader health care protection, makes available higher cash assistance to families, and has increased the minimum wage to \$10 an hour.
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Implications:

- Federal funding for education is imperative for students to be able to afford tuition. Federal budget cuts might have a profane effect on federal funding for education.
- A reduction in federal funding will strain already limited state resources.
- A larger share of the California budget will be used to accommodate rising costs in health care, family assistance plans, higher minimum wage, et cetera. This could drain the already depleting resources being allocated to educational expenses. This could reduce the amount of state funded aid, increase class size at state and community colleges, and increase the amount of debt per graduate.
- The National and State government's response to the economy and educational expenditures will need to be monitored closely.

Sources:

- California Department of Finance, Governor's Budget, 2014.
 - Congressional Budget Office, Budget Projections: Fiscal Years 2013-2013, 2014.
 - Congressional Budget Office, The budget and Economic Outlook: 2014-2024, 2014.
 - National Council of State Legislatures, Undocumented Student Tuition, 2014.
 - Legislative's Analyst Office, Higher Education, 2014.
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Environmental Scan- External
Environmental Sector: Political, Legislative, and Regulatory

External Force/ Issue: Trends in Financial Aid

Key Trends- Grants

- In 2012-2013, undergraduate and graduate students received a total of \$115.7 billion dollars in grants. That is an increase of 233% since 1992-1993, and an increase of 69% since 2005-2006.

Figure 5: Growth of Federal, Institutional, Private and Employer, and State Grant Dollars in 2012 Dollars, 1992-93 to 2012-13

Grants in Billions of 2012 Dollars

	1992-93	1996-97	1997-98	1998-99	1999-00	2000-01	2005-06	2009-10	2010-11	2011-12	2012-13
State Grants	\$3	\$5	\$5	\$5	\$6	\$6	\$8	\$9	\$10	\$10	\$10
Private and Employer Grants	\$5	\$5	\$6	\$6	\$7	\$8	\$11	\$13	\$14	\$14	\$15
Institutional Grants	\$13	\$17	\$18	\$19	\$21	\$22	\$28	\$37	\$41	\$43	\$44
Federal Grants	\$14	\$12	\$13	\$14	\$14	\$15	\$21	\$45	\$52	\$48	\$47
TOTAL	\$34.7	\$38.4	\$41.3	\$45.2	\$47.9	\$50.4	\$68.4	\$104.4	\$116.6	\$114.2	\$115.7

Percentage

	1992-93	1996-97	1997-98	1998-99	1999-00	2000-01	2005-06	2009-10	2010-11	2011-12	2012-13
State Grants	10%	12%	12%	11%	12%	13%	12%	9%	8%	8%	8%
Private and Employer Grants	13%	13%	13%	14%	15%	15%	16%	13%	12%	13%	13%
Institutional Grants	37%	44%	44%	43%	44%	43%	41%	36%	35%	37%	38%
Federal Grants	40%	32%	31%	31%	29%	29%	31%	43%	45%	42%	41%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Percentages may not sum to 100 because of rounding.

This table was prepared in October 2013.

- Federal grants increased 124% since 2005-2006, and institutional grants increased 57% since 2005-2006.
- In 2005-2006, federal grants contributed to 31% of all grants; however, in 2012-2013, federal grants contributed to 41% of all grants.

**Environmental Scan- External
Pell Grants**

- Total Pell Expenditures has increased 118% since 2002-2003.
- The number of PELL recipients has increased 83% since 2002-2003.
- Since 2010-2011, the maximum Pell grant awarded and the average Pell grant awarded per recipient have decreased.

**Federal Pell Grant Awards in 2012 Dollars, 1976-77 to 2012-13,
Selected Years**

	In 2012 Dollars			Number of Pell Recipients (in Millions)
	Total Pell Expenditure s (in Billions)	Maximum Pell Grant	Average Pell Grant Per Recipient	
1976-77	\$5.9	\$5,617	\$3,045	1.9
1977-78	\$5.7	\$5,258	\$2,847	2.0
1982-83	\$5.7	\$4,230	\$2,255	2.5
1987-88	\$7.6	\$4,228	\$2,623	2.9
1992-93	\$10.1	\$3,914	\$2,516	4.0
1997-98	\$9.0	\$3,854	\$2,421	3.7
2002-03	\$14.8	\$5,088	\$3,099	4.8
2007-08	\$16.1	\$4,740	\$2,912	5.5
2008-09	\$19.1	\$4,928	\$3,095	6.2
2009-10	\$31.9	\$5,692	\$3,942	8.1
2010-11	\$37.5	\$5,832	\$4,028	9.3
2011-12	\$34.0	\$5,628	\$3,605	9.4
2012-13	\$32.3	\$5,550	\$3,650	8.8

SOURCES: The Federal Pell Grant Program End-of-Year Report, 2011-12; Federal Student Aid

Data Center (studentaid.ed.gov/about/data-center/student/title-iv) unpublished data from the U.S. Department of Education, Office of Postsecondary Education.

This table was prepared in October 2013.

Environmental Scan- External

- The costs of tuition and fees have increased since 1993-1994; however, the percentage of tuition and fees covered by the Pell grant has decreased.

Inflation-Adjusted Maximum Pell Grant, Tuition and Fees (TF), Tuition and Fees and Room and Board (TFRB), and Maximum Pell Grant as a Percentage of TF and TFRB, 1993-94 to 2013-14

Academic Year	Private Nonprofit Four-Year				Maximum Pell Grant
	Tuition and Fees	Percentage covered	TFRB	Percentage covered	
1993-94	\$17,464	21%	\$25,060	15%	\$3,649
1994-95	\$18,092	20%	\$25,470	14%	\$3,551
1995-96	\$18,352	19%	\$26,113	13%	\$3,515
1996-97	\$18,962	19%	\$26,788	13%	\$3,604
1997-98	\$19,677	20%	\$27,635	14%	\$3,854
1998-99	\$20,649	20%	\$28,726	15%	\$4,211
1999-00	\$21,327	20%	\$29,514	15%	\$4,295
2000-01	\$21,309	21%	\$29,487	15%	\$4,375
2001-02	\$22,429	22%	\$30,792	16%	\$4,840
2002-03	\$22,974	22%	\$31,633	16%	\$5,088
2003-04	\$23,608	21%	\$32,462	16%	\$5,046
2004-05	\$24,247	20%	\$33,222	15%	\$4,899
2005-06	\$24,599	19%	\$33,701	14%	\$4,749
2006-07	\$25,115	18%	\$34,334	13%	\$4,560
2007-08	\$25,759	18%	\$35,188	13%	\$4,740
2008-09	\$25,849	19%	\$35,204	14%	\$4,928
2009-10	\$27,383	21%	\$37,310	15%	\$5,692
2010-11	\$28,128	21%	\$38,320	15%	\$5,832
2011-12	\$28,276	20%	\$38,506	15%	\$5,628
2012-13	\$28,989	19%	\$39,447	14%	\$5,550
2013-14	\$29,515	19%	\$40,130	14%	\$5,536

SOURCES: The Federal Pell Grant Program End-of-Year Report, 2011-12; unpublished data from the U.S. Department of Education, Office of Postsecondary Education;

The College Board, *Trends in College Pricing*.

This table was prepared in October 2013.

University of the West: Number of Pell grant Recipients, amount Awarded, and average amount per recipient

Academic Year	# of Recipients	Amount	Average Amount per recipient
2007-2008	3	\$4,502	\$1,501
2008-2009	2	\$4,140	\$2,070
2009-2010	11	\$32,632	\$2,967
2010-2011	12	\$49,049	\$4,087
2011-2012	15	\$39,233	\$2,616
2012-2013	24	\$102,936	\$4,289
2013-2014	37	\$165,119	\$4,463

- The number of UWest student recipients of Cal Grants has increased 113% since 2007-2008.
- The amount of Cal Grant aid awarded to UWest students has increased to \$165,119, which is an increase of 35.7%.

State Grants

- Percentage of Undergraduate State Grant Aid for Which Students' Financial Circumstances Were Considered in California is 100%. The national average is 74%.
- State Grant Aid per Full-Time Equivalent (FTE) Undergraduate Student in 2012 Dollars is \$890 dollars, which is \$220 more than the national average.
- State Grant Expenditures as a Percentage of Total State Support for Higher Education is nearly 16% in the state of California, which is 3 percentage points higher than the national average. Additionally, California is the 13th highest state when it comes to state expenditures as a percentage of total state support for higher education.
- 13% of recipients that were awarded Cal grants in 2012-2013 resided in Los Angeles County. Furthermore, 12% of the amount awarded was disbursed to LA county residents.
- Average amount per resident in the LA County was about \$3,973.33.

Environmental Scan- External
**2012-2013 Cal Grant Recipients and Dollars
by California State Districts- LA County**

District	Recipients	Amount	Avg amount per recipient
20	4595	\$20,994,000	\$4,568.88
21	7325	\$24,609,000	\$3,359.59
22	2570	\$12,832,000	\$4,993.00
24	2095	\$10,475,000	\$5,000.00
25	4280	\$20,384,000	\$4,762.62
26	6350	\$19,104,000	\$3,008.50
27	5190	\$22,174,000	\$4,272.45
28	2555	\$12,459,000	\$4,876.32
29	3795	\$16,083,000	\$4,237.94
30	5225	\$19,785,000	\$3,786.60
32	5585	\$18,039,000	\$3,229.90
Total:	49565	\$196,938,000	\$3,973.33

Percentage of California 13% 12%

- The number of UWest student recipients of Cal Grants has increased from just one in 2009-2010 to 19 in 2013-2014. The amount awarded to UWest students has increased by 227% since 2009-2010.
- Three of those students in 2013-2014 were undocumented students.

Cal grant Recipients at UWest

Academic Year	# of Recipients	Amount	# of undocumented Students	Amount for Undocumented Students
2009-2010	1	\$5,320		
2010-2011	1	\$6,766		
2011-2012	2	\$6,768		
2012-2013	8	\$38,033		
2013-2014	19	\$126,019	3	\$23,304

**Environmental Scan- External
Key Trends- Loans:**

- In 2012-213, total student borrowing reached \$110.3 billion dollars.
- Total student borrowing increased 110% since 2000-2001.
- Federal Unsubsidized loans increased 223%, and Federal Stafford loans increased 27% since 2000-2001.
- In 2012-2013, Federal unsubsidized loans made up 50% of all student loans. That is a 51% change in distribution of total loans per student since 2000-2001.
- Federal Stafford Loans and Perkins Loans are need-based loans and do not accrue interest while the student is still at school.
- Federal unsubsidized loans and PLUS loans are not needs-based loans and do accrue interest while the student is in school; however, they carry a federal guarantee and interest rates are controlled by congress. Additionally, most of these loans can be consolidate under the Obama administration’s “Student Forgiveness Act.”

Figure 6: Growth of Federal and Nonfederal Loan Dollars in 2012 Dollars, 1992-93 to 2012-13
Loans in Billions of 2012 Dollars

	1992-93	1999-00	2000-01	2005-06	2010-11	2011-12	2012-13
Nonfederal Loans		\$6	\$7	\$21	\$8	\$8	\$9
Perkins and Other Federal Loans	\$6	\$2	\$2	\$2	\$1	\$1	\$1
Grad PLUS Loans					\$7	\$8	\$7
Parent PLUS Loans	\$2	\$5	\$5	\$10	\$11	\$11	\$10
Federal Unsubsidized Loans	\$0	\$17	\$17	\$28	\$50	\$48	\$55
Federal Stafford Loans	\$16	\$22	\$22	\$29	\$43	\$42	\$28
Total	\$23.4	\$51.4	\$52.4	\$88.8	\$120.1	\$117.9	\$110.3

Percentage of Total

	1992-93	1999-00	2000-01	2005-06	2010-11	2011-12	2012-13
Nonfederal Loans	0%	12%	13%	23%	7%	7%	8%
Perkins and Other Federal Loans	24%	3%	3%	2%	1%	1%	1%
Grad PLUS Loans					6%	6%	7%
Parent PLUS Loans	8%	9%	9%	11%	9%	10%	9%
Federal Unsubsidized Loans	2%	33%	33%	31%	41%	41%	50%
Federal Stafford Loans	67%	43%	41%	32%	36%	35%	25%
Total	100%	100%	100%	100%	100%	100%	100%

NOTE: Nonfederal loans include loans to students from states and from institutions, in addition to private loans issued by banks, credit unions, and Sallie Mae.

Estimates of institutional and state loan volume are included only for academic years 1999-2000 through 2012-13. This table was prepared in October 2013.

Implications:

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- Given the current state of the economy, it is hard to believe that both the federal and California state government will be able to sustain this level of student debt.
 - Pell grant expenditures have increased astronomically since 2000-2001; however, the maximum amount awarded and the average amount awarded per recipient has decreased. This is mostly due to the fact that the number of student recipients is increasing at 15% annually.
 - In 2012-2013, the total Pell grant expenditures and number of Pell grant recipients decreased. These are possible signs of the federal government's inability to afford this growing debt burden.
 - The percentage of tuition and fees covered by the Pell grant has decreased steadily since its all-time high in 2000-2001. This will inevitably put more pressure on the student to take on federal and private loans, which will put more underrepresented students in debt. In fact, it could deter underrepresented students from attending college.
 - The number of UWest students receiving Pell grant aid has increased 117% since 2007-2008. We expect this number to increase as we continue to recruit students within a 20 mile radius of our university.
 - Nearly 13% of the total number of Cal grants awarded was to Los Angeles county residents. Of the \$197 billion dollars of Cal grant aid awarded in 2012-2013, nearly \$24 billion, or 12%, of that was awarded to Los Angeles County residents.
 - Not surprisingly, given our location in Los Angeles County, the number of UWest students awarded Cal grants has increased from 1 to 19. We expect this number to increase in the future.
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Sources:

College Board Advocacy and Policy Center, Trends in Student Aid, NCES, 2012.

Economic Summary

The recent recession had a devastating impact on the nation's economy. Every industry in the United States was affected, including higher education. The State of California and Los Angeles County did not escape this rippling effect. Economic performance is a crucial indicator to follow when scanning the external environment for factors and phenomena that could affect student recruitment, retention and success. Economic projections are a good indicator of which industries will succeed and grow, and which industries are becoming obsolete.

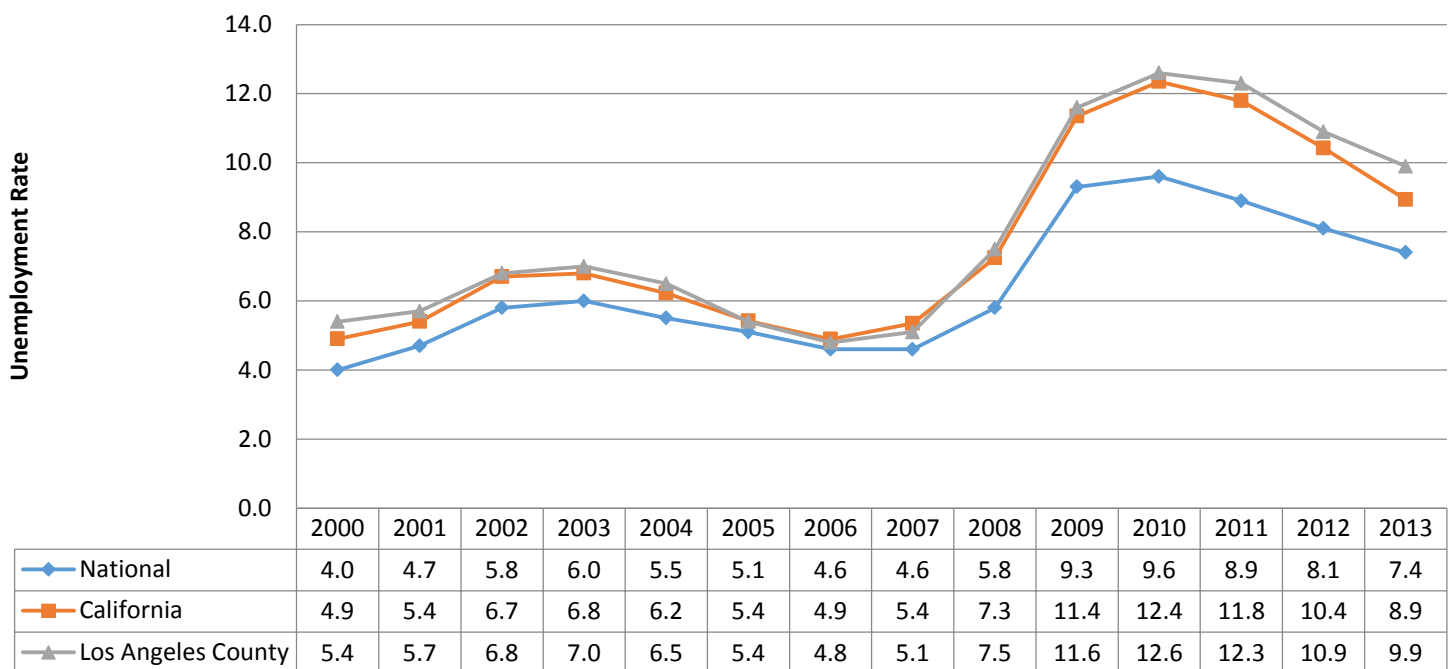
- The national unemployment rate skyrocketed to 9.6% in 2010. Since then, the national unemployment rate has decreased to 7.4%, and the Federal Reserve is expecting that number to decline even more to the 6.3%-6.6% range. Furthermore, they are projecting the unemployment rate to decrease to the 5.2% - 5.8% range in the long run.
- The state of California (12.4%) and Los Angeles County (12.6%) had an even higher unemployment rate than the national average. However, in 2013, they both witnessed a decrease in their unemployment rate to 8.9% and 9.9% respectively. Los Angeles County still has one of the highest unemployment rates in the country. This is not a good sign for University of the West considering the fact that we are located in Los Angeles County. More students are finding it harder to afford college tuition when a majority of their parents and/or relatives are unemployed.
- Health care services, educational services, and professional and business services are projected to be the three fastest growing occupations in the next 6 years.
- In the states of California: home health aides, market research analyst and marketing specialists, and personal care aides are projected to be the three fastest growing occupations.
- In Los Angeles County: Biomedical Engineers, Helpers, and home health aides are projected to become the three fastest growing occupations.
- 20% of the 20 fastest growing occupations in Los Angeles County require a bachelor's degree.
- Median income per household continues to increase at the national level as well as in the state of California.
- The United States has an uncanny ability to maintain a low inflation rate even during times of growth. This will undoubtedly help consumerism as people are able to buy more goods with fewer resources.
- The global economy was also hit hard by the recent recession. In 2012, the world economy slowed to a measly growth rate of 2.5%. High income countries were growing at a sluggish 1.5%. The global economy has rebounded significantly since the last recession, and economist are predicting better days ahead.

Environmental Scan- External
Environmental Sector: Economic

External Force/ Issue: Unemployment Rate

Key Trends:

Comparing Unemployment Rates (2000-2013)



- It is evident from the graph presented above that the unemployment rates for the state of California and the city of Los Angeles have decreased in parallel with the national unemployment rate; however, the state of California and Los Angeles County fared far worse than the national average.
- In 2013, the national unemployment rate decreased to 7.4%; however, the state of California's unemployment rate was still hovering around 9%, and Los Angeles County at a staggering 10%.

Environmental Scan- External

National

- The Federal Reserve is anticipating a decrease in the national unemployment rate well into the future. In 2015, the projected national unemployment rate is expected to decrease from 7.4% to the 6.3%- 6.6% range.
- By 2015-2016, the Federal Reserve is expecting unemployment rate to be below 5.8%. Furthermore, they are projecting a long-run unemployment rate of 5.2%-5.8%.
- Although nowhere near the pre-recession levels, unemployment rates are on a downward trajectory.
- The unemployment rate for workers between the ages of 20 and 24 are experiencing higher rates than the national average. At 13%, recent college graduates are still finding it more difficult than other age groups to find a job.

State

- California State was hit pretty hard by the recent recession. Unemployment rates in the state of California reached 12.4% in 2010. The unemployment rate has since decreased to 8.4%; however, this is still well above the national average and still significantly higher than pre-recession levels.
- A recent report on employment in California by the CPS indicated a slight decrease in unemployment (down to 7.9%) during the holiday seasons and well into January of 2014. However, after the holiday season, the unemployment rate increased again to 8.5%.
- The unemployment rate for residents of California between the ages of 20-24 (also, the average age of recent undergraduate graduates) is at an astonishingly high rate of 15%, which is 2 percentage points higher than the national average for this same group.
- State unemployment rates for residents between the ages of 25- 34 fared better at 8.8%.
- Unemployment by duration of time spent unemployed, saw some improvements at the beginning of 2014: percentage of unemployed waiting 52 or more weeks to reenter the workforce dropped from 32.8% to 27.6%.
- Unemployment by race is unevenly distorted. Although unemployment rates for Hispanics and Blacks have decreased since the beginning of 2014, they are still 1.6 and 6.4 percentage points lower than their white peers.

Environmental Scan- External
Los Angeles County

- The unemployment rate for Los Angeles County residents is 10%. It has improved tremendously since its all-time high of 12.6% in 2010, but still not near its pre-recession average.

**California State Unemployment Rate by
Metropolitan area**

Area Name	Unemployment Rate
Arcadia City	5.0%
Azusa City	9.6%
Diamond Bar City	6.3%
East Los Angeles CDP	12.6%
East San Gabriel CDP	5.4%
El Monte City	11.0%
Hacienda Heights	6.5%
Industry City	16.1%
Irwindale City	9.1%
Long Beach City	9.8%
Los Angeles City	9.8%
Monrovia City	7.8%
Montebello City	9.9%
Monterey Park City	6.7%
North El Monte	3.0%
Pico Rivera City	8.2%
Rosemead City	7.8%
San Gabriel City	7.2%
San Marino City	4.0%
South El Monte City	11.3%
South Pasadena City	4.3%
South San Gabriel City	6.4%
South Whittier	7.8%
Temple City City	5.7%
West Covina City	7.8%
Whittier City	6.3%

- East Los Angeles city has one of the highest unemployment rates in Los Angeles County. Most of our students from Avance come from this area.

Implications:

- High unemployment rates could have a correlating effect on student enrollment. Students between the ages of 18-24 might not be able to afford higher education if their parents or relatives are unemployed.
- High unemployment rates could lure working age prospects back to college, either to attain a 4 year degree or to pursue a higher level degree.
- High national unemployment rates could increase the national debt as the government is forced to increase unemployment benefits for those who have lost their jobs.
- High state wide unemployment rates will increase the already over stretched state budget.
- National and state funding for higher education could be effected if the unemployment rate does not improve in the near future. If this proves to be another burden on the national and state budget, cuts to grants and other forms of student aid might be implemented.
- Los Angeles County is where a majority of our potential students reside. Los Angeles County has one of the highest unemployment rates in the state; however, there are signs that that number might improve.
- East Los Angeles is where a majority of our recent first-time, freshmen student population resides. High unemployment in this area could affect further recruitment efforts in this area.

Sources:

State of California Employment and Development Department, Labor Force and unemployment Data, 2014.

Board of Governors of the Federal Reserve, Economic Projection of Federal Reserve Board members, 2014.

Bureau of Labor Statistics, Labor Force Statistics from the Current Population Survey, 2014.

Environmental Scan- External
Environmental Sector: Economic

External Force/ Issue: Employment Projections

Key Trends:
National

Employment by Major Industry Sector, 2010 and projected 2020 (in thousands)						
Industry Sector	Employment		Change	Percent Distribution		Annual Growth Rate
	2010	2020		2010-2020	2010	2020
Services- providing	112,730	130,680	17,950	79%	80%	1.5
Utilities	552	516	-36	40.0%	30.0%	-0.7
Wholesale trade	5,456	6,200	744	3.8%	3.8%	1.3
Retail Trade	14,414	16,182	1,768	10.1%	9.9%	1.2
Transportation and warehousing	4,183	5,036	853	2.9%	3.1%	1.9
Information	2,711	2,851	140	1.9%	1.7%	0.5
Financial Activities	7,630	8,411	781	5.3%	5.1%	1
Professional and Business Services	16,688	20,497	3,809	11.7%	12.5%	2.1
Educational services	3,150	3,969	819	2.2%	2.4%	2.3
Health care and social services	16,415	22,054	5,639	11.5%	13.5%	3
Leisure and Hospitality	13,020	14,362	1,342	9.1%	8.8%	1
Other Services	6,031	6,851	820	4.2%	4.2%	1.3
Federal Government	2,968	2,596	-372	2.1%	1.6%	-1.3
State and local government	19,513	21,155	1,642	13.6%	12.9%	0.8

- Health care and social services are the fastest growing occupation nationally at 3% per year.
- Educational, and professional and business services are the second and third fastest occupation at 2.3% and 2.1% per year respectively.
- Cuts in the national budget will cause federal government jobs to decrease in the future.
- Educational services will add 2.3% more jobs annually; however, it will only add 819 jobs over this time period.

Environmental Scan- External
The 20 industries with the largest projected wages and salary employment growth, 2010-2020 (in thousands)

Industry Description	Sector	Employment			Annual Growth Rate (percent) 2010-2020
		2010	2020	Change 2010-2020	
Construction	Construction	5,525.6	7,365.1	1,839.5	2.9
Retail Trade	Retail Trade	14,413.7	16,182.2	1,768.5	1.2
Offices of Health practitioners	Health Care and Social Assistance	3,818.2	5,209.6	1,391.4	3.2
Hospitals	Health Care and Social Assistance	4,685.3	5,563.6	878.3	1.7
Home Health Care Services	Health Care and Social Assistance	1,080.6	1,952.4	871.8	6.1
Food Services and Drinking Places	Leisure and Hospitality	9,351.8	10,212.2	860.4	0.9
Individual and Family Services	Health Care and Social Assistance	1,215.0	2,066.4	851.4	5.5
Nursing and Residential care facilities	Health Care and Social Assistance	3,129.0	3,951.0	822.0	2.4
Wholesale Trade	Wholesale Trade	5,456.1	6,200.2	744.1	1.3
General Local government educational services compensation	State and Local Government	8,010.4	8,751.4	741.0	0.9
Computer Systems design and related services	Professional and Business Services	1,441.5	2,112.8	671.3	3.9
Employment Services	Professional and Business Services	2,716.7	3,348.0	631.3	2.1
Management, scientific, and technical consulting services	Professional and Business Services	991.4	1,567.0	575.6	4.7
Junior Colleges, Colleges, universities, and professional schools	Educational Services	1,694.0	2,171.1	477.1	2.5
Outpatient, laboratory, and other ambulatory care services	Health Care and Social Assistance	1,077.1	1,471.2	394.1	3.2
Architectural, engineering, and related services	Professional and Business Services	1,276.6	1,635.1	358.5	2.5
Services to building and dwellings	Professional and Business Services	1,742.5	2,044.8	302.3	1.6
Truck Transportation	Transportation and Warehousing	1,244.0	1,544.0	300.0	2.2
General State government educational service compensation	State and Local Government	2,377.1	2,661.7	284.6	1.1
Child day care services	Health Care and Social Assistance	851.8	1,101.3	249.5	2.6

- Home health care services will grow the fast at 6.1% annually. Followed closely by Individual and family services and management, scientific, and technical consulting services at 5.5% and 4.7% respectively.
- 7 of the 20, or 35%, of the fastest nationally growing occupations are in the health sector.
- 25% of the fastest nationally growing occupations are in the professional and business sector.
- Construction, retail trade and office of health practitioners will add the most jobs over this time period at 1,840, 1,769 and 1,391 respectively.
- Retail trade, food services and drinking places, and general local government educational services compensation will hire the most people at 16,182, 10,212 and 8,751 respectively.

Environmental Scan- External

Employment by major occupational group, 2012 and projected 2022 (Numbers in thousands)					
2012 National Employment Matrix title and code	Employment		Change, 2012-22		Median annual wage, 2012 ⁽¹⁾
	2012	2022	Number	Percent	
Total, All Occupations	145,355.8	160,983.7	15,628.0	10.8	\$34,750
Management Occupations	8,861.5	9,498.0	636.6	7.2	\$93,910
Business and Financial Operations Occupations	7,167.6	8,065.7	898.1	12.5	\$62,500
Computer and Mathematical Occupations	3,814.7	4,500.5	685.8	18.0	\$76,270
Architecture and Engineering Occupations	2,474.5	2,654.0	179.6	7.3	\$73,540
Life, Physical, and Social Science Occupations	1,249.1	1,374.8	125.7	10.1	\$60,100
Community and Social Service Occupations	2,374.7	2,783.4	408.8	17.2	\$40,400
Legal Occupations	1,247.0	1,379.9	132.9	10.7	\$75,270
Education, Training, and Library Occupations	9,115.9	10,131.7	1,015.8	11.1	\$46,020
Arts, Design, Entertainment, Sports, and Media Occupations	2,570.9	2,751.6	180.6	7.0	\$43,930
Healthcare Practitioners and Technical Occupations	8,049.7	9,782.6	1,732.9	21.5	\$60,200
Healthcare Support Occupations	4,110.2	5,266.0	1,155.8	28.1	\$25,550
Protective Service Occupations	3,325.3	3,588.3	263.0	7.9	\$36,620
Food Preparation and Serving Related Occupations	11,780.1	12,882.0	1,101.8	9.4	\$18,930
Building and Grounds Cleaning and Maintenance Occupations	5,522.3	6,213.3	691.0	12.5	\$22,690
Personal Care and Service Occupations	5,375.6	6,498.5	1,122.9	20.9	\$20,840
Sales and Related Occupations	15,105.0	16,200.5	1,095.5	7.3	\$25,120
Office and Administrative Support Occupations	22,470.1	24,004.1	1,534.0	6.8	\$31,510
Farming, Fishing, and Forestry Occupations	947.2	915.0	-32.2	-3.4	\$19,370
Construction and Extraction Occupations	6,092.2	7,394.1	1,301.9	21.4	\$40,120
Installation, Maintenance, and Repair Occupations	5,514.8	6,046.0	531.2	9.6	\$41,020
Production Occupations	8,941.9	9,017.5	75.6	0.8	\$30,920
Transportation and Material Moving Occupations	9,245.7	10,036.4	790.6	8.6	\$28,960

(1) Data are from the Occupational Employment Statistics program, U.S. Department of Labor, U.S. Bureau of Labor Statistics.

Source: Employment Projections program, U.S. Department of Labor, U.S. Bureau of Labor Statistics

**Environmental Scan- External
California**

State of California								
Top 20 Fastest Growing Occupations 2010-2020								
Occupational Title	Annual Average Employment		Employment Change	2012 First Quarter Wages [1]		Education and Training Levels [2]		
	2010	2020	Percent	Median Hourly	Median Annual	Entry Level Education	Work Experience	On-the-Job Training
Home Health Aides	61,100	93,100	52.4	\$10.44	\$21,712	8	None	ST OJT
Market Research Analysts and Marketing Specialists	53,700	78,300	45.8	\$32.74	\$68,104	3	None	None
Personal Care Aides	324,700	462,900	42.6	\$10.34	\$21,510	8	None	ST OJT
Emergency Medical Technicians and Paramedics	15,900	22,600	42.1	\$15.19	\$31,578	5	None	None
Medical Scientists, Except Epidemiologists	27,800	39,300	41.4	\$40.12	\$83,430	1	None	None
Marriage and Family Therapists	10,700	14,900	39.3	\$22.27	\$46,311	2	None	I/R
Diagnostic Medical Sonographers	5,300	7,300	37.7	\$40.17	\$83,540	4	None	None
Biochemists and Biophysicists	6,400	8,800	37.5	\$39.19	\$81,515	1	None	None
Logisticians	13,600	18,200	33.8	\$37.92	\$78,861	3	1-5 years	None
Tapers	6,000	8,000	33.3	\$23.75	\$49,410	8	None	MT OJT
Pharmacy Technicians	29,000	38,600	33.1	\$18.41	\$38,285	7	None	MT OJT
Cost Estimators	22,400	29,600	32.1	\$32.25	\$67,087	3	None	None
Database Administrators	11,200	14,800	32.1	\$38.72	\$80,523	3	1-5 years	None
Pharmacy Aides	8,100	10,700	32.1	\$11.61	\$24,158	7	None	ST OJT
Software Developers, Systems Software	75,500	99,600	31.9	\$55.19	\$114,795	3	None	None
Training and Development Specialists	18,800	24,800	31.9	\$31.00	\$64,471	3	None	None
Credit Analysts	6,000	7,900	31.7	\$34.27	\$71,275	3	None	None
Nonfarm Animal Caretakers	19,600	25,700	31.1	\$10.13	\$21,070	8	None	ST OJT
Healthcare Social Workers	12,600	16,500	31.0	\$29.22	\$60,777	2	None	None
Veterinary Technologists and Technicians	8,400	11,000	31.0	\$16.77	\$34,876	4	None	None

- Similar to national trends, home health aides is the fast growing occupation in the state of California at 52.4%.
- Personal cares aides is projected to grow 42.6% and create more than 138,000 jobs.
- Software Developers, systems software industry is expected to grow nearly 32% of this course of time, with a median income of nearly \$115,000.
- Of the 20 fastest growing occupations in the state of California, 10% require a doctoral degree; 10% require a master's degree; 35% require a bachelor's degree; 10% require an associate's degree; 20% require less than high school.
- Of the 20 fastest growing occupations in the state of California, 20% require a higher level degree (master's or higher), and 55% require at least a bachelor's degree.
- Only 10% of the jobs posted above require work experience.
- 65% of the fastest growing occupations in California do not provide on-the-job-training.
- If they do offer on-the-job-training, only 20% offer short-term training and 10% offer long-term training.



**Environmental Scan- External
Los Angeles County**

Employment Development Department
Labor Market Information Division
September 25, 2012

**2010-2020 Fastest Growing Occupations
Los Angeles-Long Beach-Glendale Metropolitan Division
(Los Angeles County)**

SOC Code	Occupational Title	Annual Average Employment		Employment Change	2012 First Quarter Wages [1]		Education and Training Levels [3]		
		2010	2020	Percent	Median Hourly	Median Annual	Entry Level Education	Work Experience	On-the-Job Training
17-2031	Biomedical Engineers	500	800	60.0	\$42.02	\$87,399	3	None	None
47-3011	Helpers--Brickmasons, Blockmasons, Stonemasons, and Tile and Marble Setters	820	1,230	50.0	\$12.94	\$26,921	8	None	ST OJT
31-1011	Home Health Aides	14,730	22,010	49.4	\$10.05	\$20,913	8	None	ST OJT
47-3012	Helpers--Carpenters	540	800	48.1	\$15.21	\$31,618	8	None	ST OJT
29-2041	Emergency Medical Technicians and Paramedics	3,540	5,080	43.5	\$13.21	\$27,477	5	None	None
21-1013	Marriage and Family Therapists	2,320	3,310	42.7	\$23.53	\$48,951	2	None	I/R
13-1161	Market Research Analysts and Marketing Specialists	13,380	18,950	41.6	\$27.96	\$58,174	3	None	None
39-3011	Gaming Dealers	3,440	4,810	39.8	\$8.97	\$18,672	7	None	MT OJT
13-1121	Meeting, Convention, and Event Planners	1,940	2,680	38.1	\$23.97	\$49,853	3	<1 year	None
31-2011	Occupational Therapy Assistants	450	610	35.6	\$31.13	\$64,758	4	None	None
47-2082	Tapers	850	1,150	35.3	\$21.83	\$45,410	8	None	MT OJT
47-2121	Glaziers	670	900	34.3	\$26.33	\$54,780	7	None	APP
49-9062	Medical Equipment Repairers	620	830	33.9	\$24.99	\$51,974	4	None	MT OJT
49-3091	Bicycle Repairers	450	600	33.3	\$10.45	\$21,746	7	None	MT OJT
31-2022	Physical Therapist Aides	1,690	2,250	33.1	\$12.70	\$26,426	7	None	MT OJT
39-9021	Personal Care Aides	130,910	171,210	30.8	\$10.23	\$21,261	8	None	ST OJT
53-3041	Taxi Drivers and Chauffeurs	5,970	7,800	30.7	\$10.65	\$22,159	8	None	ST OJT
13-1081	Logisticians	3,200	4,170	30.3	\$37.62	\$78,249	3	1-5 years	None
25-1124	Foreign Language and Literature Teachers, Postsecondary	1,520	1,980	30.3	[2]	\$66,627	1	None	None
11-9051	Food Service Managers	11,600	15,090	30.1	\$22.60	\$47,011	7	1-5 years	None

Entry Level Education	Work Experience in a Related Occupation	
1- Doctoral or professional degree	>5 years	More than 5 years experience in a related occupation or field is common.
2- Master's degree		
3- Bachelor's degree	1-5 years	a related occupation or field is common.
4- Associate's degree		
5- Postsecondary non-degree award	<1 year	Less than 1 year experience in a related occupation or field is common.
6- Some college, no degree		
7- High school diploma or equivalent	None	No work experience is typically required.
8- Less than high school		

On-the-Job Training	
I/R	Internship/Residency
APP	Apprenticeship
LT OJT	Long-term on-the-job training
MT OJT	Moderate-term on-the-job training
ST OJT	Short-term on-the-job training
None	None

Environmental Scan- External

- The fastest growing occupation in Los Angeles County is biomedical engineers at 60%.
 - The next two fastest growing occupations are helpers and home health aides at 50% and 49.4% respectively.
 - Personal Care aides will grow at 30.8% and offer the most jobs at 171,210.
 - Biomedical engineers and Logisticians are expected to make the highest median income at \$87,000 and \$78,000 respectively.
 - Of the 20 fastest growing occupations in Los Angeles County, only one occupation requires a doctoral degree; 5% requires a master's degree; 20% require a bachelor's degree; 10% require an associate's degree.
 - 40% of the fastest growing occupations in LA County will require at least an associate's degree or higher. That is 25 percentage points lower than the state.
 - 55% of the fastest growing occupations in LA County only require a high school diploma or less.
 - 30% require no high school degree.
-

Implications:

- If job growth by occupational category is an indicator to predict demand for current degree programs then UWest is currently unable to tap into the growth Health Services market.
 - Nationally, and the state of California will need workers with a postsecondary degree; however, LA county is producing jobs that primarily only need workers with a high school degree or less. This could hurt our recruiting efforts if local students feel that they could live a better life without having to attain a post-secondary degree.
 - Market research analysts and Marriage and Family Therapists are occupations that are expected to grow 46% and 39% respectively. Both concentrations are offered at UWest.
 - Business related jobs at the National and State level seem to be growing at a healthy rate.
 - Social science occupations are growing at the national and state level.
-

Sources:

Employment Development Department, State of California, 2014.

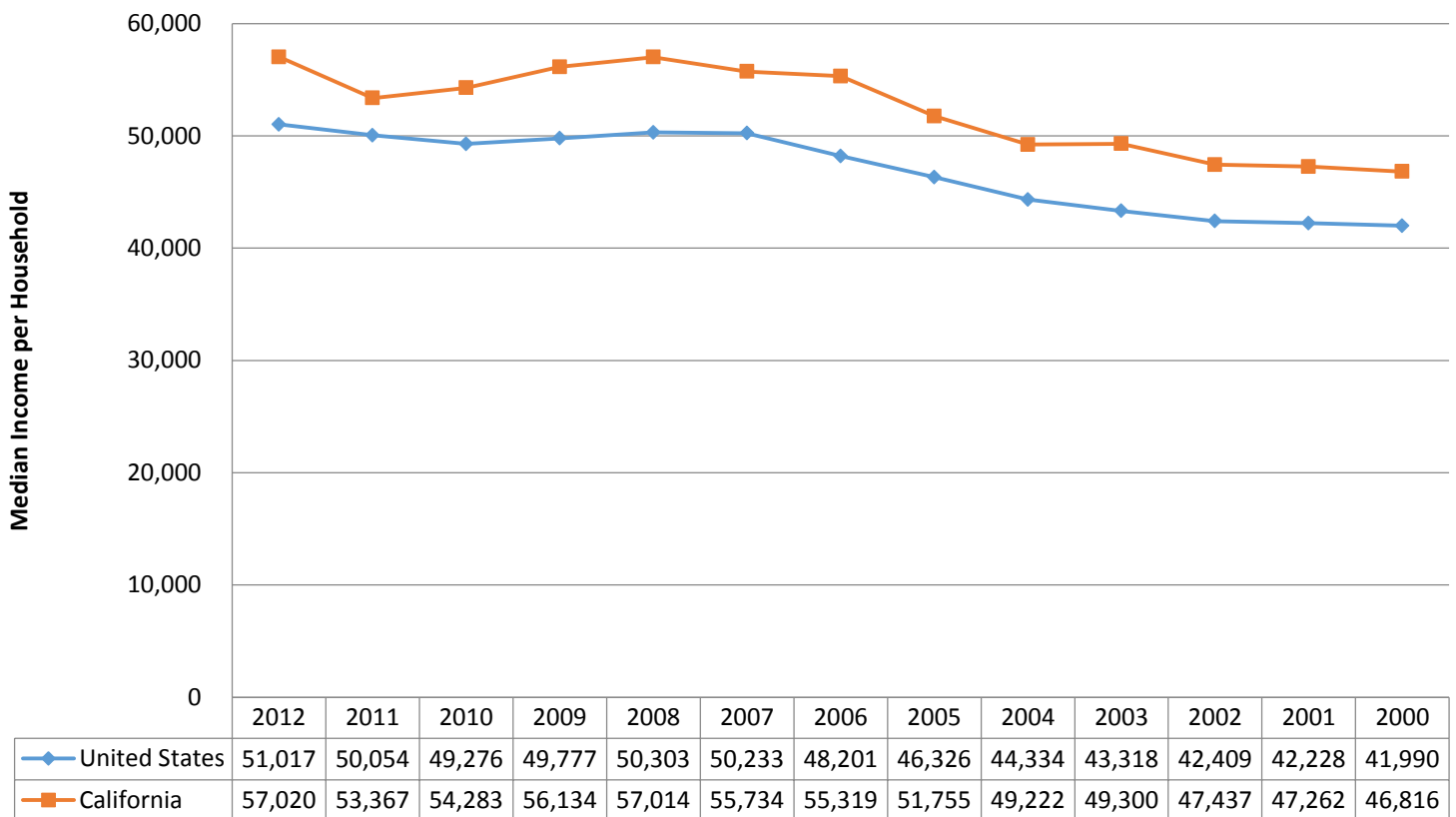
Bureau of Labor Statistics, U.S. Department of Labor, 2014.

Environmental Scan- External
Environmental Sector: Economic

External Force/ Issue: Median Household Income

Key Trends:

Median Income per Household



- Median household income in the state of California is higher than the national average.
- Median household income plateaued in the national level during the recession, with a slight decrease in 2009-2010.
- Median household income in the United States was affected much more dramatically and for a prolonged period of time than the nation. Median household income in the state of California decreased in 2009 and just recently recovered in 2012.
- Post-recession median household income continues to rise above pre-recession level.

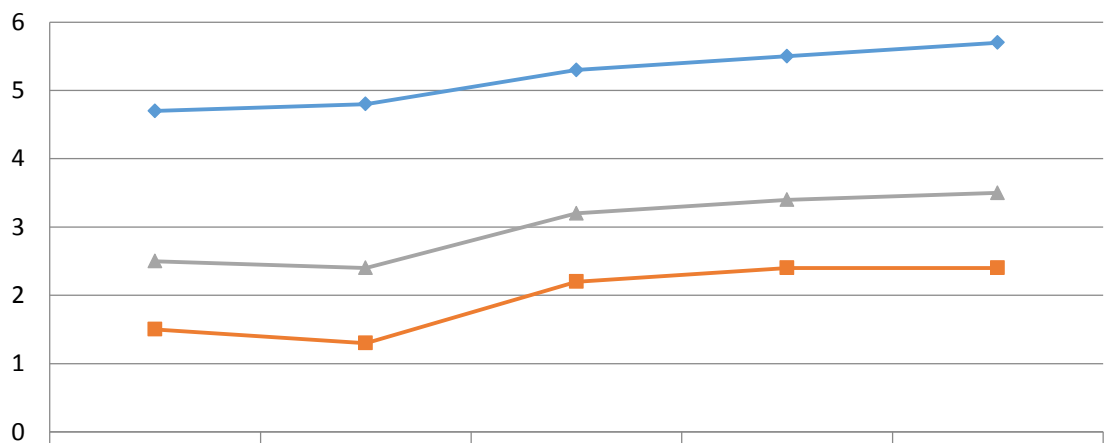
Environmental Scan- External

Environmental Sector: Economic

External Forces/ Issue: International Economy

Key Trends:
International

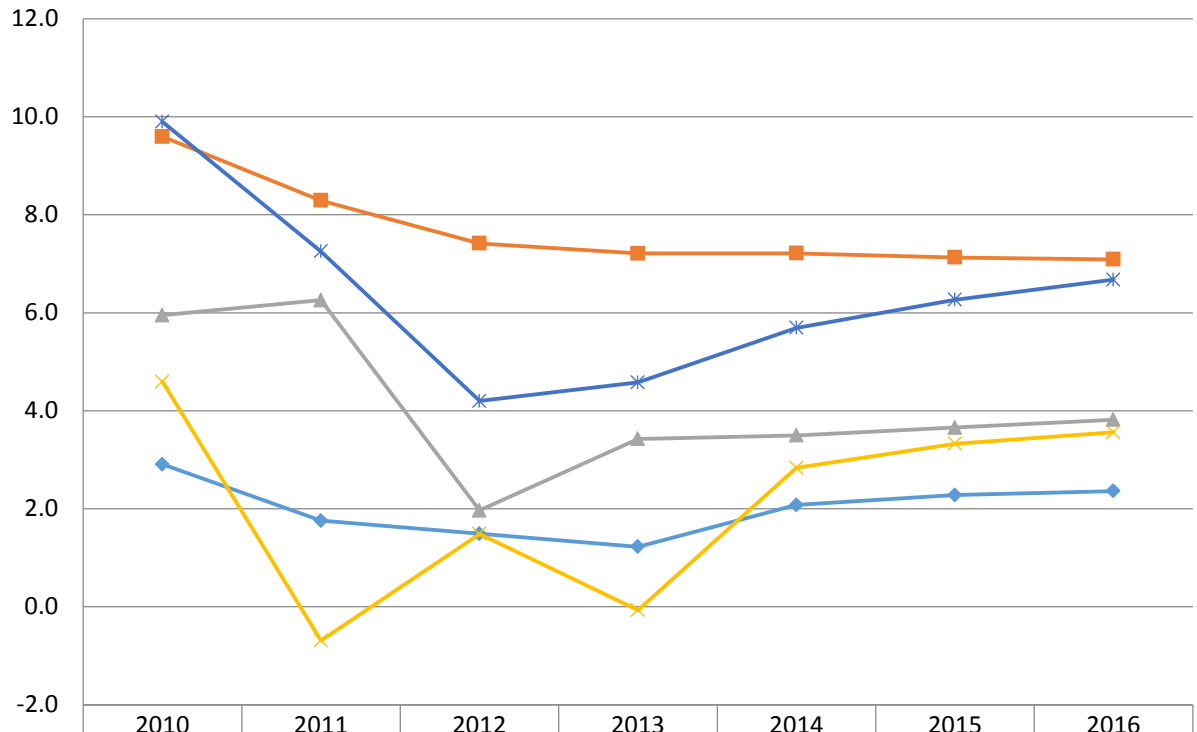
Expected GDP Growth Rate (2012-2016)



	2012	2013	2014	2015	2016
Developing Countries	4.7	4.8	5.3	5.5	5.7
High Income Countries	1.5	1.3	2.2	2.4	2.4
World (WBG members)	2.5	2.4	3.2	3.4	3.5

- Developing countries are expected to continue their upward trend in GDP growth.
- The world economic output will continue to be fuelled by the growth that is unfolding in developing countries.
- Growth in developing countries is expected to increase 21%; high income countries 60%; world economy 40%.
- Growth in developing countries is still 2.2 percentage points less than its pre-recession levels.
- The World Bank claims that growth in developing countries is attributed to stages in the growth cycle (67%), and slower growth (33%). However, since 67% of slower growth can be attributed to its stage in the growth cycle, little concern is placed on this slow down.

GDP Growth by Region (2010-2016)



◆ All OECD Countries	2.9	1.8	1.5	1.2	2.1	2.3	2.4
■ East Asia & Pacific	9.6	8.3	7.4	7.2	7.2	7.1	7.1
▲ Europe & Central Asia	5.9	6.3	2.0	3.4	3.5	3.7	3.8
✕ Middle East & N. Africa	4.6	-0.7	1.5	-0.1	2.8	3.3	3.6
* South Asia	9.9	7.3	4.2	4.6	5.7	6.3	6.7

- All the countries listed above were equally affected by the recent recession.
- The Middle East witnessed negative growth in 2011 and 2013. However, it is expected to recover and grow by 3.6% in 2016.
- East Asia and Pacific region had a softer landing than its South Asian counterparts. However, South Asia is expected to grow by 6.7% in 2016, which is a 59% increase from its decade low in 2012.

Implications:

- A slowdown in GDP will have a negative effect on an international student's ability to attend post-secondary education institutions in the United States.
 - 50% of UWest students are international students.
 - Rising GDP growth rates indicate an expected increase in international students. Although, GDP growth rates are not near its pre-recession level.
-

Sources:

International Monetary Fund, World Economic Outlook Database, 2014.

The World Bank, World Bank Database, 2014.

Social and Demographic

Highlights:

- The population of the United States is expected to grow 54% by 2020. That makes the United States the third largest country, in terms of population, behind China and India respectively. The Hispanic and Asian populations will grow the most at 18% and 17% respectively. The white population is expected to grow at 5%. However, when measuring growth rates for an ethnic group as a percentage of the total population, we start to see a different story. Although the white population is not expected to grow as fast as the before mentioned groups, the white population will still make up nearly 65% of the national population. By 2020, the Hispanic population will maintain its status as the second largest ethnic group in America and they will make up nearly 16% of the total population.
- The population demographics of the state of California is notably different than the national norm. By 2020, the Hispanic population will be the largest ethnic group in the state of California. The white ethnic population will be second with 37%. The third largest ethnic group as a percentage of the total population will be Asian (13%).
- Population projections for Los Angeles County deviate even more from the national norm. Hispanics make up nearly 48% of the population, and by 2020 will make up 53% of the total population. The next largest ethnic group in LA County is white (28%) and Asian (14%). In fact, by 2020, the white population, as a percentage of the total population residing in LA County, will decrease -21%.
- From 2010-2014, the high school graduation rate fell -5%. However, the projected number of high school graduates is expected to increase 2% by 2020.
- Since 2000, the number of high school graduates that were Hispanic and Asian increased 65% and 26% respectively. Other than two or more races, the Asian student population is expected to witness the highest growth rate in high school graduates.
- The high school graduation rate in the state of California is expected to increase 2% by 2020.
- The number of high school graduates from LA County is expected to increase 1% by 2020. In fact, the number of graduates from LA County make up nearly 22% of the total number of graduates in the state of California. LA County is by far the largest school district in the state of California and the second largest school district in the country.
- In 2012-2013, there were nearly 820,000 international students in the United States. India and China accounted for 41% of all international students in the United States. China, alone, accounts for nearly 30% of the total international student population.

Environmental Scan- External

- 6 of the 10 top places of origin of international students are Asian countries. 4 of the top 10 places of origin of international students are East Asian countries.
- Kuwait is the fastest growing place of origin of international students. Of the 5 fastest place of origin of international students, 4 are net oil exporters.
- In 2012-2013, for the first time there were more international students pursuing an undergraduate degree than a master's degree. Since 2000, the number of international students enrolled in non-degree program's increased 116%.
- The state of California hosts the largest population of international students in the United States. California hosted 111,379 international students in 2012-2013, which is 14% of the total international student population in the United States.
- 16% of the total international student population of California attended USC and UCLA.
- 2.2% of the total international student population of the US attended USC and UCLA.
- Business Management and (21.8%) and Engineering degrees (18.8%) are by far the most popular majors among international students.
- 17 out of the 25 countries of origin with the largest international student presence in the United States majored overwhelmingly in business administration degrees. Vietnam, Indonesia, Venezuela, and china had the largest concentration of students enrolled in business administration degrees at 38.1%, 29.6%, 29.3%, and 29% respectively.
- In 2012-2013, nearly 64% of funding towards tuition for an international student came from family and friends. Domestic students received 23% of their funding towards tuition from family and friends.

Environmental Sector: Social and Demographic

External Force/ Issue: Population Growth Projections

Key Trends:
National

- The National population is expected to increase 59% from 2014 to 2020. At 341 billion people, the United States will maintain its number three spot of the world's largest populations behind China and India respectively.

Population Projections by Ethnicity						
Ethnicity	2010	2014	2020	2010-2014 % Change	2014-2020 % Change	2010-2020 % Change
White Only	246,630,456	254,339,176	266,274,842	3%	5%	8%
Black only	39,909,206	41,686,247	44,389,212	4%	6%	11%
American Indian and Alaskan Native	3,187,528	3,414,124	3,758,823	7%	10%	18%
Asian Only	14,414,623	16,095,771	18,756,003	12%	17%	30%
Native Hawaiian and Pacific islander	591,877	647,839	734,111	9%	13%	24%
Hispanic Only	49,725,793	56,063,065	66,364,826	13%	18%	33%
Two or more races	5,499,173	6,239,808	7,473,674	13%	20%	36%

- The Hispanic population is expected to be the fastest growing ethnic group in the United States at 18% from 2014-2020. From 2010-2020, the Hispanic population is expected to grow 33%.
- The Asian population will grow the second fastest after the Hispanic population at 17% from 2014-2020. From 2010-2020, the Asian population is expected to grow 30%.
- The slowest growing ethnic group is the white only. They are expected to grow at a meager 8% from 2014-2020.

Ethnic Breakdown as a percentage of the total population						
Ethnicity				2010-2014	2014-2020	2010-2020
	2010	2014	2020	% Change	% Change	% Change
White Only	69%	67%	65%	-2%	-3%	-5%
Black only	11%	11%	11%	-1%	-1%	-2%
American Indian and Alaskan Native	1%	1%	1%	2%	2%	4%
Asian Only	4%	4%	5%	6%	8%	15%
Native Hawaiian and Pacific islander	0%	0%	0%	4%	5%	9%
Hispanic Only	14%	15%	16%	7%	10%	18%
Two or more races	2%	2%	2%	8%	11%	20%

- The White only ethnicity will continue to hold a majority of the overall population at 65%; however, their share of the population is expected to decrease -5% by 2020.
- By 2020, the Hispanic and Asian population will have increased their share of the total population by 18% and 15% respectively.

State

- California State is expected to grow at 4.7% from 2015 to 2020.
- Los Angeles County is expected to grow at 3.6% from 2015 to 2020.

Population Projections by State and County						
State/ County				2010-2015	2015-2020	2015-2020
	2010	2015	2020	% Change	% Change	% Change
California	37,309,382	38,801,063	40,643,643	4%	5%	9%
Los Angeles County	9,824,906	10,081,144	10,441,441	3%	4%	6%

- Both the state of California and Los Angeles County are expected to grow well below the national average.

Environmental Scan- External

Population Projections by Ethnicity (California)			
Ethnicity			2010- 2020 % Change
	2010	2020	
White Only	15,024,945	14,877,111	-1.0%
Black only	2,188,296	2,258,934	3%
American Indian and Alaskan Native	163,040	175,465	8%
Asian Only	4,827,438	5,432,231	13%
Native Hawaiian and Pacific islander	131,415	151,810	16%
Hispanic Only	14,057,596	16,573,840	18%
Two or more races	916,651	1,174,252	28%

- Very similar to national projections, the white population is expected to decrease by 2020.
- By 2020, Hispanics will be the largest ethnic group in California.

Population Projections by Ethnicity as a percentage of the total population (California)			
Ethnicity			2010-2020 % Change
	2010	2020	
White Only	40%	37%	-9.1%
Black only	6%	6%	-5%
American Indian and Alaskan Native	0%	0%	-1%
Asian Only	13%	13%	3%
Native Hawaiian and Pacific islander	0%	0%	6%
Hispanic Only	38%	41%	8%
Two or more races	2%	3%	18%

- By 2020, the Hispanic population will make up more than 41% of the total population in the state of California. That is well above the national average of 16%.
- The white population is expected to shrink to 37% of the total population. That is 28 percentage points less than the national average.

Environmental Scan- External
Los Angeles County

- In Los Angeles County, the Hispanic population is expected to grow at a much faster rate than the national and state level at 18%, 18%, and 25% respectively.
- The white population is expected to decrease at a much faster rate than at the national and state level.
- The Asian population is expected to grow 19% by 2020, which is slightly higher than the national and state level projections.
- By 2020, the Hispanic population will account for 53% of the total population in Los Angeles County. They will be by far the largest ethnic group in Los Angeles County.

Population Projections by Ethnicity (Los Angeles County)			
Ethnicity			2010-2020 %
	2010	2020	Change
White Only	2,746,305	2,417,921	-12.0%
Black only	821,829	762,208	-7%
American Indian and Alaskan Native	19,527	21,031	8%
Asian Only	1,336,086	1,590,167	19%
Native Hawaiian and Pacific islander	23,152	27,194	17%
Hispanic Only	4,694,972	5,856,169	25%
Two or more races	183,035	275,645	51%

Population Projections by Ethnicity as a percentage of the total population (Los Angeles County)			
Ethnicity			2010-2020 %
	2010	2020	Change
White Only	28%	22%	-21.0%
Black only	8%	7%	-17%
American Indian and Alaskan Native	0%	0%	-3%
Asian Only	14%	15%	7%
Native Hawaiian and Pacific islander	0%	0%	5%
Hispanic Only	48%	53%	12%
Two or more races	2%	3%	35%

Implications:

- The state of California and Los Angeles County's ethnic breakdown is characteristic of the national projections. Los Angeles County is growing far faster than any other group.
 - By 2020, the ethnic breakdown of Los Angeles County will be completely dominated by the Hispanic population.
 - Universities will need to adapt their policies and procedures to take advantage of this growing ethnic group.
 - Additional research will need to be conducted on how to recruit Hispanic students.
 - In addition, we think that additional research should be conducted on the Hispanic population to prepare the university to better accommodate their needs.
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Sources:

Central Intelligence Agency Library, World Fact Book, 2014.

California Department of Finance, Population Projections, 2014.

United States Census Bureau, Population Projections, 2014.

Environmental Scan- External

Environmental Sector: Social and Demographic

External Force/ Issue: High School Graduate Projections

Key Trends:
National

- At the national level, high school student enrollment decreased from 2010-2014 by -4%; However, from 2014-2020 the national government is projecting a gradual increase in high school graduate.
- Nonpublic schools continue to witness decrees in their student graduate numbers. In fact, they are projected to decline -19% from 2014-2020.
- In 2020-2021, we are expecting national high school graduates to increase near 2010-2011 highs.

High School Graduates- National			
	Public Total	Nonpublic Total	Public and Nonpublic Total
2000-2001	2,569,200	280,806	2,850,006
2010-2011	3,101,815	307,346	3,409,161
2014-2015	2,975,411	272,586	3,247,997
2020-2021	3,081,361	221,452	3,302,813
% Change 2010-2014	-4%	-11%	-5%
% Change 2014-2020	4%	-19%	2%
% Change 2000-2020	20%	-21%	16%

- The number of white high school students is expected to decline -2% by 2020.
- The number of Hispanic high school students is expected to increase +14% by 2020. Hispanic students are the fastest growing ethnic group in the United States.

Actual and projected numbers for enrollment in grades 9-12 in public schools, by race/ ethnicity (in thousands).						
Year	White	Black	Hispanic	Asian/ PI	AI/AN	Two + races
2000	8,750	2,119	1,894	601	153	n/a
2010	8,109	2,422	3,125	755	171	277
2014	7,821	2,322	3,473	805	167	318
2020	7,640	2,283	3,969	958	178	381
Percentage Change over time						
2000-2010	-7%	14%	65%	26%	12%	n/a
2010-2014	-4%	-4%	11%	7%	-2%	15%
2014-2020	-2%	-2%	14%	19%	7%	20%

California

High School Graduates- California	
Public and Nonpublic Total	
2011-2012	418,411
2014-2015	404,826
2020-2021	414,872
2022-2023	424,331
% Change 2011-2014	-3%
% Change 2014-2020	2%
% Change 2011-2020	1%

- From 2011-2014, the number of high school graduates decreased -3%; however, we are projecting that number to reverse upwards to nearly 425,000 by 2020. With that being said, we are only expecting a meager +1% increase in the number of high school graduates.

Environmental Scan- External
Los Angeles County

High School Graduates- Los Angeles County		
	Public and Nonpublic Total	% of State Total
2011-2012	104,785	25%
2014-2015	97,312	24%
2020-2021	93,126	22%
2022-2023	94,177	22%
% Change 2011-2014	-7%	-4%
% Change 2014-2020	1%	-1%
% Change 2011-2020	-10%	-11%

- The number of high school graduates in Los Angeles County has declined since 2011, and it's expected to continue its decline well into 2020.
- The number of high school graduates in Los Angeles County represents more than 20% of the total number of high school graduates in the state of California. However, this proportion of LA County graduates to California State graduates has and is expected to continue to decline since 2011.

Implications:

- A decrease in high school graduates means that fewer students will be applying for post-secondary degrees.
- The projected number of high school graduates at the national level witness a slight decline from 2010-2014, but it is expected to recuperate and grow nearly 20% from 2000-2020.
- The expected number of high school graduates from the state of California is not expected to produce at the same level as the national numbers. This could mean that the State of California is under-producing when compared to other states that are contributing positively to the national count.
- Los Angeles County is fairing far worse than the state of California; not to mention much worse than the entire country. This could hurt our recruiting efforts tremendously as the number of potential student prospects decline over the coming years.
- Taking into consideration the fact that Los Angeles is saturated with institutions of Higher Education and the diminishing number of high school graduates, that future does not look positive for our recruiting strategies.

Environmental Scan- External

Sources:

U.S. Department of Education, National Center for Educational Statistics, 2014.

California Department of Finance, Demographic Research Unit, 2014.

Knocking at the College Door, WICHE, 2014.

Environmental Scan- External
Environmental Sector: Social and Demographic

External Force/ Issue: International Students

Key Trends:

- China continues to dominate the place of origin of international students studying in the United States. In fact, Chinese students make up nearly 29% of the total number of international students studying in the U.S.

International Student Enrollment in the U.S.			
Year	# of Int'l Students	Annual Change	% International
2001/2002	582,996	6.4%	3.7%
2005/2006	564,766	-3.1%	3.2%
2010/2011	723,277	28.1%	3.5%
2012/2013	819,644	13.3%	3.9%

- India and China combines account for nearly 41% of international student studying in the U.S.; however, from 2011-2012 to 2012-2013 academic years, the number of Indian students in the U.S. has decreased -3.5%.
- Of the countries placed in the top 10, 4 are from East Asia, and 6 are from Asia (not including West Asia).

Top 10 places of origin of international students, 2011/2012- 2012/2013					
Rank	Place of Origin	2011-2012	2012-2013	2012-2013 % of Total	% Change
1	China	194,029	235,597	28.7%	21.4%
2	India	100,270	96,754	11.8%	-3.5%
3	South Korea	72,295	70,627	8.6%	-2.3%
4	Saudi Arabia	34,139	44,566	5.4%	30.5%
5	Canada	26,821	27,357	3.3%	2.0%
6	Taiwan	23,250	21,867	2.7%	-5.9%
7	Japan	19,966	19,568	2.4%	-2.0%
8	Vietnam	15,572	16,098	2.0%	3.4%
9	Mexico	13,893	14,199	1.7%	2.2%
10	Turkey	11,973	11,278	1.4%	-5.8%

Environmental Scan- External

- Of the 4 countries that reside in East Asia, only one, China, witnessed a percentage increase in international students from 2011-2012 to 2012-2013.
- Saudi Arabia experienced the highest growth rate in number of students studying in the U.S. at a one year percentage change of 30.5%.

Top 5 fastest growing places of origin of international students, 2011/2012- 2012/2013

Rank	Place of Origin	2011-2012	2012-2013	2012-2013 % of Total	% Change
1	Kuwait	3,722	5,115	0.6%	37.4%
2	Saudi Arabia	34,139	44,566	5.4%	30.5%
3	Iran	6,982	8,744	1.1%	25.2%
4	China	194,029	235,597	28.7%	21.4%
5	Brazil	9,029	10,868	1.3%	20.4%

- Students from Kuwait increased the most from the previous year at 37.4%.
- Of the five countries listed above, three of them reside in the Middle-East, and 4 of them are net oil exporters.

Academic Level Trends- International Students in the U.S.

Year	Undergraduate	% Change	Graduate	% Change	Non-degree	% Change
2001/2002	261,079	2.6%	264,749	11%	34,423	1.6%
2005/2006	236,342	-9%	259,717	-2%	30,611	-11.1%
2010/2011	291,439	23%	296,574	14%	59,233	93.5%
2012/2013	339,993	17%	311,204	5%	73,528	24.1%

- The majority of international students tend to take degree-seeking work. In fact, nearly 80% of international students were enrolled in either an undergraduate or graduate degree in 2012-2013.
- Until 2010-2011, international students were mostly enrolled in graduate programs. Now, there are more international students taking undergraduate programs than graduate level programs.
- Non-degree seeking programs witnessed the sharpest rise in international student enrollment from 2005-2006-2010-2011, and again in 2012-2013 at 24%.

Environmental Scan- External

- The state of California hosts the most international students than any state in the U.S... In 2012-2013, California hosted 111,379 international students, or 14% of the total international student population.
- The University of Southern California and University of California- Los Angeles hosted 9,840 and 8,424 international students respectively. In fact, USC hosts more international students than any other university in the United States. UCLA hosted the 8th largest segment of international students in the U.S...
- 16% of the total number of international students in California study at USC and UCLA.
- 2.2% of the total number of international students in the U.S. study at USC and UCLA.

Top Field of Study- International Students in the U.S.				
Field of Study	2011-2012	2012-2013	% of Total	% Change
Business and Management	166,733	178,984	21.8%	7.3%
Engineering	141,285	154,186	18.8%	9.1%
Math and Computer Science	71,364	77,560	9.5%	8.7%
Social Sciences	66,163	73,274	8.9%	10.7%
Physical and Life Sciences	66,007	69,152	8.4%	4.8%
Fine and Applied Arts	41,710	45,850	5.6%	9.9%
Intensive English	38,887	39,990	4.9%	2.8%
Health Professions	29,535	31,222	3.8%	5.7%
Humanities	16,294	17,121	2.1%	5.1%
Education	17,200	17,011	2.1%	-1.1%
Agriculture	9,750	10,463	1.3%	7.3%

- 21.8% of international students in the U.S. are enrolled in business and management related degrees, which is the highest proportion.
- Business management, engineering, and math and computer science make up 50% of the total number of international students.
- Social Sciences witnessed the largest percentage change from a year ago at 10.7%.

Field of Study of Students from Selected Places of Origin, 2012-2013
Percent of total

Place of Origin	Business/ Management	Education	Engineering	Fine/ Applied Arts	Health Professions	Humanities	Intensive English	Math/ Computer Science	Physical/ Life Sciences	Social Sciences
Brazil	23.8%	1.9%	11.2%	8.9%	3.1%	3.4%	2.7%	3.8%	6.0%	9.3%
Canada	15.8%	6.9%	7.5%	8.8%	15.0%	4.4%	0.1%	2.6%	8.5%	13.0%
China	29.0%	1.7%	19.2%	4.9%	1.3%	1.0%	3.2%	11.2%	8.8%	8.2%
Colombia	19.0%	2.6%	13.5%	8.9%	2.3%	5.5%	7.0%	3.3%	9.7%	11.7%
France	24.9%	0.9%	11.6%	6.6%	1.5%	6.9%	1.4%	5.7%	5.2%	9.9%
Germany	26.0%	1.6%	7.9%	4.2%	2.3%	6.9%	0.9%	3.1%	8.2%	14.1%
Hong Kong	27.4%	1.0%	6.5%	10.3%	3.4%	3.0%	2.5%	5.7%	6.0%	15.0%
India	13.7%	0.5%	35.6%	1.7%	4.7%	0.5%	0.1%	23.1%	11.2%	3.5%
Indonesia	29.6%	2.0%	15.6%	9.5%	2.3%	1.7%	1.2%	5.1%	5.3%	9.8%
Iran	4.7%	1.3%	55.2%	5.4%	2.3%	1.0%	1.6%	9.6%	10.5%	3.6%
Japan	17.4%	2.4%	3.7%	8.1%	2.8%	5.8%	14.6%	2.2%	4.8%	11.5%
Malaysia	18.2%	2.2%	28.4%	4.3%	2.9%	1.7%	0.1%	8.0%	11.8%	9.8%
Mexico	21.5%	3.3%	17.0%	8.9%	2.9%	3.4%	2.7%	4.0%	6.5%	10.5%
Nepal	19.0%	1.0%	20.3%	1.5%	9.4%	1.1%	0.1%	11.9%	19.6%	5.5%
Nigeria	15.5%	1.7%	24.1%	2.3%	12.5%	2.3%	0.2%	7.4%	13.0%	7.9%
Russia	28.8%	1.9%	6.8%	9.4%	2.5%	5.0%	1.9%	7.4%	11.5%	11.3%
Saudi Arabia	17.1%	2.8%	21.1%	2.1%	5.6%	1.5%	27.2%	7.4%	4.0%	2.7%
South Korea	16.4%	3.1%	10.8%	13.4%	5.0%	4.1%	4.5%	4.9%	7.0%	12.4%
Spain	22.1%	2.1%	13.1%	9.3%	2.1%	11.2%	2.2%	3.7%	4.8%	8.5%
Taiwan	20.9%	3.8%	16.6%	12.9%	3.6%	2.1%	3.7%	6.7%	10.6%	7.1%
Thailand	21.4%	2.2%	17.3%	10.1%	4.1%	1.4%	3.7%	7.0%	9.0%	7.0%
Turkey	15.1%	3.7%	25.1%	5.7%	0.7%	2.7%	3.5%	9.6%	8.6%	13.5%
United Kingdom	17.7%	3.2%	4.5%	8.6%	4.0%	6.6%	0.1%	2.9%	7.3%	18.1%
Venezuela	29.3%	2.2%	14.8%	8.4%	2.7%	2.1%	10.2%	3.4%	4.8%	6.9%
Vietnam	38.1%	1.1%	9.9%	3.5%	4.3%	1.2%	4.6%	7.5%	7.3%	5.1%

- 17 of the 25 countries listed above, or 68%, are heavily embedded in Business Management programs.
- 7 of the 25 countries listed above, or 28%, are heavily invested in engineering degrees.
- Iran and India or the most heavily invested in Engineering at 55.29% and 35.6% respectively.
- Nearly 59% of Indian students are in Engineering and math/ computer science programs.
- Vietnam has the largest investment in Business Management programs at 38.1%; however, china contributed the most students to American business programs at 68,323 students in 2012-2013.
- Saudi Arabia sends 27.2% of their students to pursue a degree in intensive English, which is the highest of any other nation.

Primary Sources of Funding of International Students, 2012-2013				
Primary Source of Funds	2011-2012	2012-2013	% of Total	% Change
Personal and Family	486,524	520,920	63.6%	⇒ 7.1%
U.S. College or University	164,394	169,566	20.7%	⇒ 3.1%
Foreign Gov't or university	44,344	57,898	7.1%	↑ 30.6%
U.S. Government	4,746	6,399	0.8%	↑ 34.8%
U.S. Private Sponsor	5,871	5,218	0.6%	↓ 11.1%
Foreign Private Sponsor	9,670	9,229	1.1%	⇒ -4.6%
International Organization	1,869	1,412	0.2%	↓ 24.5%
Current Employment	40,494	43,800	5.3%	⇒ 8.2%
Other Sources	6,583	5,202	0.6%	↓ 21.0%
Total:	764,495	819,644	100.0%	7.2%

- 63.6% of international students depend on savings and family members to finance their studies in the United States.
- 84.3% of international students finance their studies in the U.S. from personal savings and family members, and scholarships from U.S. Colleges and Universities.
- The number of international students receiving aid from the U.S. government and foreign government has increased over the past year at 34.8% and 30.6% respectively.
- The number of international students receiving funding from international organizations has decreased 24.5% since 2011-2012.

Implications:

- The number of international students studying in the United States continues to increase and is expected to increase at an even faster pace once the international economy fully recovers from the recent economic recession.
 - International students are an excellent source of tuition paying students. Nearly 64% of international students studying in the U.S. pay tuition by using their personal and/or money from family members.
 - China is the largest contributor of international students in the United States. We expected this number to increase further into the future as China continues to grow and produce a stronger middle-class foundation.
 - Most international students enroll in business management programs in the United States. The second most popular majors fall under STEM programs.
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Environmental Scan- External

Sources:

The Institute of International Education, Bureau of Educational and Cultural Affairs and the U.S. Department of State, 2014.

Technological Summary

The advent of the technology boom is still upon us, and now, more than ever, students and universities will need to think strategically about how to leverage this growing tidal wave of change into their professional and personal lives. Technology has long been used to increase productivity in the work force. Technology allows us to collect, analyze and synthesize information on a large scale, something that would be unfeasible to do without it. People that are able to adapt to the technology revolution and leverage it in their careers are becoming more attractive to employers. Universities that are able to incorporate technology into their strategic plan and leverage it properly are witnessing higher levels of sophisticated analysis, which is giving them a competitive advantage in how they operate day-to-day. The biggest concern regarding technology is that it is constantly changing. Not only is it constantly changing, but it is also causing the destruction or making some jobs obsolete in the work force. The university's ability to stay up to date on the current technology trends will come with a price tag. Not only will the university have to pay for direct costs, such as licensing and product acquisition, but the indirect costs of adapting new technology, such as training.

Highlights:

- Online learning is beginning to reshape the traditional classroom approach to learning. In 2012, 2.6% of higher education institutions claim to be experimenting with MOOCs. An additional 9.4% claim that they MOOCs are in the planning stages.
- In 2012, 70% of institutions of higher education claimed that they were integrating online learning into their strategic plan.
- In 2012, over 6.7 million students were enrolled in at least one online course, which is an increase of 318% since 2002. That being said, the percentage of students taking at least one online course of the total number of students enrolled in post-secondary institutions is 32%.
- The biggest barriers to entering the online course market are faculty buy-in and students retention. Faculty still believe overwhelmingly that online education is not a legitimate model for education our youth. Faculty are not thrilled about the learning curve involved and the additional work that is required.
- 33% of online students are enrolled in a business administration major. More specifically, students enrolled in a business administration major are concentrating in management, finance, and accounting. Social sciences and health professionals are the second and third most popular majors online.

Environmental Scan- External

- 80% of students enroll in online program that is within 100 miles of their residence. Additionally, most students taking online courses claim that tuition and fees are the most important information on a school's website.
- The acquisition and utilization of cell-phones is growing at an astronomical pace. The growth of smartphone use is allowing more students instant access to information anywhere in the world. Students can now access information about universities via the website and social media.
- Social networking is becoming more prevalent in young and mid age adults. Most people access social media via their cell phones. Facebook is the most popular social medium with the most users.
- According to the 2014 NMC report, the rise in social media subscriptions, integration of online learning, the rise of data driven decision making, and the transformation of the student to the consumer are amongst the top technology trends in higher education.
- According to the 2014 NMC report, technology illiteracy amongst faculty members, competitive new models for education, and keeping education relevant are the challenges institutions of higher education will be facing in the near future.

Environmental Sector: Technological

External Force/ Issue: MOOCs

Key Trends:

- As of 2012, only 2.6% of higher education institutions are now experimenting with MOOCs. Whereas, another 9.4% reported they were in the planning stages.
- The majority of institutions (55.4%) reported they are still undecided about MOOCs. 32.7% of institutions claim they have no plans to experiment with MOOCs.
- In 2002, less than 50% of all higher education institutions reported online education as a critical component of strategy. In 2012, that number is now close to 70%.
- The number of students taking at least one online course is 6.7 million. However, the growth rate from 2011-2012 is the lowest since this data was first collected in 2002.
- 44.6% of faculty believe that teaching an online course will involve more of their valuable time. This number has not shifted significantly since 2002.
- Private for-profit institutions tend to think more favorably of online learning.
- 77% of academic leaders rated the learning outcomes in online courses as the same or superior to those in face-to-face, which is a 35% improvement since 2003.
- Faculty continue to devalue the advantages of online learning. In fact, chief academic officers believe that only 30.2% of faculty value online learning as a legitimate means of education our youth.
- Although academic leaders believe that online learning should be incorporated into their long-term strategic initiative, most believe that there are too many barriers to incorporation.
- The most likely barriers to full incorporation of online learning into the curriculum are faculty resentment, and lack of student discipline.
- Academic administrators are worried that student retention will suffer if more courses are taught strictly online.

Environmental Scan- External

Total and Online Enrollment in Degree-granting Institutions- Fall 2002-2011						
	Total Enrollment	Growth Rate	Students taking at least one online course	Online enrollment increase	Growth Rate	Online Enrollment as a % of Total Enrollment
Fall 2002	16,611,710	n/a	1,602,970	n/a	n/a	9.6%
Fall 2005	17,487,481	5.3%	3,180,050	1,577,080	98.4%	18.2%
Fall 2008	19,102,811	9.2%	4,606,353	1,426,303	44.9%	24.1%
Fall 2011	20,994,113	9.9%	6,714,792	2,108,439	45.8%	32.0%

- In 2011, the number of students taking at least one online course as a percentage of total student enrollment in a postsecondary institution has increased 45.8% since 2008.
- 32% of the total student population took at least one online course in 2011, which is a 233% increase since 2002.
- Although the number of students taking at least one online course is increasing, the percentage growth rate in between years is not as strong as the 2002-2005 time frame.
- 33% of students taking online courses are pursuing a business degree. Most specifically, a majority of the students pursuing a business degree online are concentrating in management, finance and accounting.
- Social sciences and health professionals are the second most popular online degrees.
- Science, technology, and mathematics and education are the next most popular online programs.
- 80% of students enroll in an online program at an institution that is less than 100 miles from their residence.
- 60% of online students seek out information about online degrees directly from a college's website.
- Students claim that tuition and fees is the most important information on the website.
- 65% of online students are enrolled through non-profit institutions.
- 15% of all online students take courses at the University of Phoenix. University of Phoenix has by far the largest share of the online market than any other school.

Implications:

- The number of students taking online courses has increased at an astonishing rate since 2002.
- More academic administrators believe that online learning should be incorporated into their long-term strategies.
- Faculty are reluctant to adapt their teaching style to accommodate online learning initiatives.

Environmental Scan- External

- It seems that students are genuinely interested in online learning; however, without substantial faculty buy-in we believe that this issue still needs more time to develop.

Sources:

Changing Course: Ten Year Tracking online Education in the U.S., 2013.

Learning House, Online College Students 2012, 2013.

Environmental Scan- External

Environmental Sector: Technological

External Force/Issue: Market Trends

Key Trends:
Smartphones

- 56% of Americans with phones have smart phones.
- 12-17 years olds are expected to buy more smart phones per year than any other group under 45 years old.
- 18-34 year olds are the dominate consumer market for smartphones; they also happen to be the ideal student prospect age group.

US Smartphones by Age, 2011-2016							
millions and percentage of population							
	2011	2012	2013	2014	2015	2016	CAGR
0-11	1.0	1.3	1.6	2.0	2.3	2.6	22.3%
% of Population	1.9%	2.5%	3.2%	3.8%	4.4%	5.0%	
12-17	7.4	9.0	10.9	12.8	15.0	17.0	18.2%
% of Population	29.5%	36.0%	43.3%	50.6%	58.5%	65.4%	
18-24	16.9	18.9	20.9	23.0	25.1	26.8	9.7%
% of Population	54.5%	60.9%	67.1%	73.9%	81.1%	87.3%	
25-34	24.0	27.4	31.1	34.5	37.7	40.2	10.9%
% of Population	56.5%	63.8%	71.4%	78.3%	84.6%	89.7%	
35-44	18.4	22.6	27.0	31.1	33.6	36.1	14.4%
% of Population	44.8%	55.2%	65.8%	75.4%	81.3%	86.9%	
45-64	21.0	30.5	38.7	45.9	53.1	58.9	22.9%
% of Population	25.6%	37.0%	46.7%	55.1%	63.3%	69.7%	
65+	4.5	6.0	7.2	8.4	9.6	10.8	19.1%
% of Population	11.0%	14.1%	16.4%	18.6%	20.5%	22.4%	
Total	93.1	115.8	137.5	157.7	176.3	192.4	15.6%
% of Population	29.7%	36.6%	43.1%	48.9%	54.2%	58.5%	

*Source: eMarketer, April 2012; confirmed and republished, August 2012.

- Growth of smartphone applications allow students instant access to information about a university. Students can now validate claims made by a university instantaneously. In addition, a university's reputation can be spread by work-of-mouth at an alarmingly

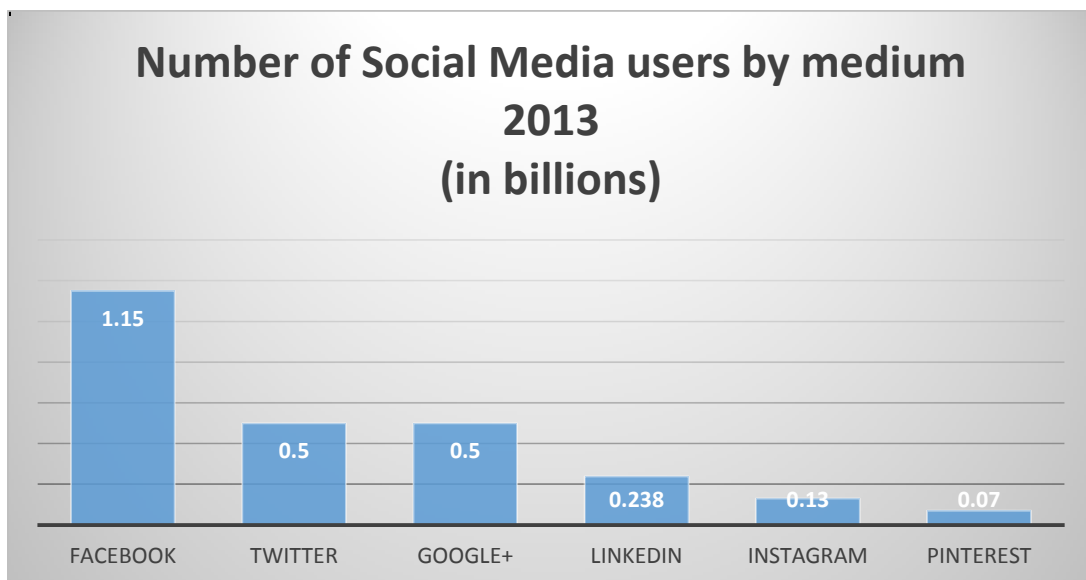
Environmental Scan- External

rate, and outside the direct control of the university. That being said, 92% of consumers trust recommendations from friends and family above all other forms of advertising.

- 51.1% of smartphone and tablet users check their mail using their smartphone.
- 63% of all teens say they exchange text messages every day with people in their lives, while only 39% call by cell phone, and 6% by mail.
- 14% of students with smartphones claimed to have browsed a college website on their phone.

Social Media

- 73% of online adults use social networking, based on a survey conducted by PewResearch.
- Of the 73%, 71% use Facebook, making Facebook the dominant medium.
- However, 42% of online adults use more than one social networking medium.
- 63% of Facebook users visit the site more than once a day.



- 65% of Facebook users access their account via their smartphone.
- 74% of marketers believe that Facebook is important for lead generation.
- 60% of Twitter users access their accounts via their smartphone.
- Google+ has been gaining ground over the recent years. Many marketers plan on expanding their outreach through this medium in the near future.
- 50% of LinkedIn users have at least a bachelor's degree.
- 4.2 billion People use their phone to access social media.
- Roughly 46% of web users use social media outlets for making purchases.

Implications:

- Students are becoming more connected via smartphones and social network mediums. This means students now have access to more information at any given time.
 - Facebook is a good medium to expand out recruiting services if done properly.
 - The use of social media should be researched and recruitment strategies that utilize social media should be tailored differently based on the demographics and characteristics of its user.
 - Instant access to school information implies that students can now check the validity of university.
 - Students can spread information by word-of-mouth faster than ever. This could prove to be a double-edged sword. Although we like the possibility of positive information being spread about our university via word-of-mouth, negative information that is damaging to our university's reputation will spread just as fast if not faster.
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Sources:

Noel-Levitz, the Online Expectation of Prospective College Students and their Parents, 2011.

NMC Horizon Report, 2014 Higher Education Preview, 2013.

Lawlor, Ten Trends for 2013, 2013.

Pew Research, Social Media Update 2013, 2013.

Digital Insights, Social Media 2013, 2013.

Environmental Sector: Technological**External Force/Issue:** Trends in Higher Education

Key Trends:

- According to the NMC report: 2014 Higher Education Edition, and with the support of the EDUCAUSE learning initiative, the following are expected trends in higher education over the coming years:
 - Growing ubiquity of social media
 - Integration of online, hybrid, and collaborative learning.
 - Rise of data-driven learning and assessment.
 - Shift from students as consumers to students as creators.
 - Agile approaches to change.
 - Evolution of online learning.
- The NMC report also dwelled on the 6 potential challenges to adopting technology in higher education:
 - Low digital fluency among faculty
 - Relative lack of rewards for teaching
 - Research comes first, teaching is an obligation.
 - Competition for new models of education
 - Scaling teaching innovations
 - Expanding access
 - Keeping education relevant
- Top Ten IT Issues, 2014 (EDUCAUSE)
 - Improving student learning outcomes through an institutional approach that strategically leverages technology.
 - Establishing a partnership between IT leadership and institutional leadership
 - Assisting faculty with IT
 - IT staffing models
 - Analytics to support institutional outcomes
 - Funding IT strategically
 - Access demand
 - Service delivery strategy
 - Sustainable online learning
 - IT compliance and risk management/ Enterprise IT architecture.

Environmental Scan- External

- Since 2000, funding IT had been ranked in the top three most important IT issues; however, after 2011 funding IT dropped to sixth on the list.
-

Implications:

- Social media and online learning seem to be the driving forces of IT in higher education. As of right now, we are not currently positioned to take advantage of these trends at UWest.
 - Funding for IT expenditures will continue to increase at astronomical rates in the future.
 - Universities will need to invest in analytical software tools.
 - Universities will need to train not only faculty members on how to incorporate technology in to the classroom, but will either have to hire professionals or train their staff members.
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Sources:

NMC Horizon Report, 2014 Higher Education Preview, 2013.

EDUCAUSE, Top Ten IT Issues, 2014, 2014.

Educational Summary

The educational landscape of the 21st century has undergone some significant changes. The number of degrees conferred over the past decade has increased significantly to keep pace with the growing market demand for employees with degrees. Students are graduating with degrees from majors that are in high demand in the market economy, such as health services. More students are pursuing advanced level degrees than before, and in majors that students did not show much interest in in the past. The age distribution of students is widening to encompass a much older generation of students now enrolling, or perhaps reenrolling in order to attain a college degree. Minority groups, such as the Hispanic and African-American populations, will soon make up a larger segment of the student population. Women continue to overshadow men in enrollment, and employers claim that, despite what has been reported in the news lately, they still value liberal arts education.

Highlights:

- Business administration, health professions, psychology, education, biology and biomedical sciences, and visual and performing arts, were the 7 majors with the highest number of degrees conferred in 2012.
- Business administration is by far the major with the largest number of degrees conferred, which was nearly 377,000 students in 2012. 20% of students that graduated with a bachelor's degree in 2012 graduated with a degree in business administration.
- Degrees in the health professions has the second highest number of degrees conferred. However, the number of degrees conferred in the health professions industry has increased 78% since 2005, and 115% since 2000. Health professions degrees are by far the fastest growing degrees conferred in the past decade and five years.
- Interdisciplinary studies, which is a major that UWest is developing and planning to offer in the near future, has witnessed a national growth in degrees conferred. Since 2000, the number of degrees conferred in interdisciplinary studies has increased 73%. Since 2005, that number increased 49%.
- Psychology, business administration, theology and religious vocations, philosophy and religions studies, and general studies all witnessed an increase in the number of degrees conferred since 2005. However, the number of English degrees conferred since 2005 witnessed a decline.
- Philosophy and religious degrees, and Theology and Religious Vocation degrees experienced a surprisingly large increase between 2000 and 2005. However, all 4

Environmental Scan- External

degrees witnessed a drop in growth in the number of degrees conferred from 2005-2012.

- Total degrees conferred for bachelor degrees, master degrees, and doctoral degrees increased 21%, 26%, and 23% respectively since 2000.
- The following is a list of degrees by degree level based on largest growth rate in degrees conferred since 2000.
 - Humanities: Doctoral degree (32%).
 - Social and Behavioral Sciences: Master's degree (31%).
 - Natural Sciences and Mathematics: Bachelor degree (33%).
 - Computer Science and Engineering: Master's degree (31%).
 - Education: Doctoral degree (32%).
 - Business Degree: Doctoral (48%).
- The age distribution of students enrolled in postsecondary education is expected to change slightly by 2020. In 2010, the percentage of students that fell into the 18-25 year old age bracket was 59%. By 2020, this percentage is expected to drop to 56%. In 2010, the percentage of students that fell into the 25+ age group was 39%. By 2020, this percentage is expected to increase to 43%.
- In 2012, only 58% of the total student population in higher education was white. That is a decrease of 10 percentage points since 2000. During this same time period, the Hispanic population grew from 1.73 million students to 3 million. They now represent nearly 14% of the total postsecondary student population.
- Based on a recent survey administrated by the AAC&U, most employers believe that critical thinking, communication, and complex problem solving skills are in the highest demand among employers. Furthermore, employers claim that in today's market, critical thinking as well as a broad set of skills are in a high demand.
- Most employer believe that institutions of higher education do a good job preparing recent graduates for entry level positions, but not for advancement.

Environmental Scan- External
Environmental Sector: Educational

External Force/Issue: Trends in Higher Education

Bachelor Degrees Conferred by postsecondary institutions, 2000-2012							
Largest programs by number of students							
	Business	Social Sciences and history	Health Professions	Psychology	Education	Biology and biomedical sciences	Visual and Performing Arts
2000-2001	263,515	128,036	75,933	73,645	105,458	60,576	61,148
2005-2006	318,042	161,485	91,973	88,134	107,238	70,607	83,297
2011-2012	366,815	178,543	163,440	108,986	105,785	95,849	95,797
% change in student population by degree							
2000-2005	21%	26%	21%	20%	2%	17%	36%
2005-2012	15%	11%	78%	24%	-1%	36%	15%
2000-2012	39%	39%	115%	48%	0%	58%	57%

*Digest of Education Statistics, IPEDS

- There were more students that graduated with a business degree than any other degree at the baccalaureate level. In fact, 20% of undergraduate students that graduated during the 2011-2012 academic year received a B.A. in business.
- Degrees in health professions witnessed the largest increases since 2000 and 2005.

Bachelor Degrees Conferred by postsecondary institutions, 2000-2012							
Largest programs as a percentage of the total student graduate population							
	Business	Social Sciences and history	Health Professions	Psychology	Education	Biology and biomedical sciences	Visual and Performing Arts
2000-2001	21%	10%	6%	6%	9%	5%	5%
2005-2006	21%	11%	6%	6%	7%	5%	6%
2011-2012	20%	10%	9%	6%	6%	5%	5%
% change in student population by degree							
2000-2005	0%	10%	3%	0%	-15%	-4%	14%
2005-2012	-5%	-10%	45%	2%	-18%	15%	-5%
2000-2012	-5%	-1%	50%	2%	-31%	10%	8%

*Digest of Education Statistics, IPEDS

- Health professional degrees now make up 9% of the total degrees conferred. That is a 45% and 50% increase since 2000 and 2005 respectively.
- The number of degrees conferred in education related fields have decreased since 2000.
- It is obvious from the table listed above that students that have entered traditional programs in the past are now enrolling in degree programs that are in higher demand.

Environmental Scan- External

Bachelor degrees offered at University of the West							
	Business	English Language	General Studies	Philosophy and Religious Studies	Psychology	interdisciplinary studies	Theology and Religious Vocations
2000-2001	263,515	50,569	37,962	8,717	73,645	26,478	6,945
2005-2006	318,042	55,096	44,898	11,985	88,134	30,583	8,548
2011-2012	366,815	53,767	46,925	12,651	108,986	45,716	9,369
% change in student population by degree							
2000-2005	20.7%	9%	18%	37%	20%	16%	23%
2005-2012	15.3%	-2%	5%	6%	24%	49%	10%
2000-2012	39.2%	6%	24%	45%	48%	73%	35%

*Digest of Education Statistics, IPEDS

- The table listed above pertains to degrees offered at University of the West.
- The English language degree witnessed a slight decline in the number of degrees conferred between 2005 and 2012.
- Overall, the number of degrees conferred for academic programs offered at UWest have witnessed promising increases in the United States.

Bachelor Degrees Conferred by postsecondary institutions, 2000-2012							
Bachelor degrees offered at University of the West as a % of total degrees conferred							
	Business	English Language	General Studies	Philosophy and Religious Studies	Psychology	multi/ interdisciplinary studies	Theology and Religious Vocations
2000-2001	21%	4.1%	3.1%	0.7%	6%	2.1%	0.5%
2005-2006	21%	3.7%	3.0%	0.6%	6%	2.0%	0.6%
2011-2012	20%	3.0%	2.6%	0.7%	6%	2.6%	0.5%
% change in student population by degree							
2000-2005	0.0%	-10%	-3%	-14%	0%	-5%	20%
2005-2012	-4.8%	-19%	-13%	17%	2%	30%	-17%
2000-2012	-4.8%	-27%	-16%	0%	2%	24%	0%

*Digest of Education Statistics, IPEDS

- Across the board, with the exception of psychology and to some extent both religions students and interdisciplinary studies, the degrees offered at UWest have started to lose representation.
- The English Language degree has lost the most traction since 2000.
- General students has declined 13% and 16% since 2000 and 2005 respectively.
- Theological studies witnessed an increase between 2000 and 2005, but decreased 17% from 2005-2012.

Environmental Scan- External

Degrees Conferred by degree level at postsecondary institutions, 2000-2012							
Bachelor's degrees							
	Total Degrees	Humanities	Social and behavioral Sciences	Natural Sciences and Mathematics	Computer Science and Engineering	Education	Business
2000-2001	1,244,171	214,107	201,681	89,772	117,011	105,458	263,515
2005-2006	1,485,242	261,696	249,619	105,899	128,886	107,238	318,042
2011-2012	1,791,046	295,221	287,529	141,354	145,924	105,785	366,815
% Change 2005-2012	21%	13%	15%	33%	13%	-1%	15%
Master's degrees							
2000-2001	473,502	40,625	30,330	15,360	44,098	127,829	115,602
2005-2006	599,731	49,584	37,139	19,574	50,444	174,620	146,666
2011-2012	754,229	59,979	48,723	25,570	66,014	178,062	191,571
% Change 2005-2012	26%	21%	31%	31%	31%	2%	31%
Doctoral degrees							
2000-2001	119,585	6,166	9,021	10,190	6,315	6,284	1,180
2005-2006	138,056	6,628	8,835	12,097	9,734	7,584	1,711
2011-2012	170,062	8,733	10,525	14,974	10,554	9,990	2,531
% Change 2005-2012	23%	32%	19%	24%	8%	32%	48%

- PhD in business degrees witnessed the largest increase since 2005 at 48%. Business, followed by education at 32% and the humanities at 32%.
- Education degrees at the bachelor level witnessed a decrease in growth, at the master's level it grew at a meager 2%; however, at the doctoral level it increased 32%.
- Degrees in the natural sciences and mathematics witnessed a sharp increase at the bachelor's level in comparison to the other concentrations.

Degrees Conferred by degree level at postsecondary institutions as a % of the population, 2000-2012							
Bachelor's degrees							
	Total Degrees	Humanities	Social and behavioral Sciences	Natural Sciences and Mathematics	Computer Science and Engineering	Education	Business
2000-2001	67.7%	82.1%	83.7%	77.8%	69.9%	44.0%	69.3%
2005-2006	66.8%	82.3%	84.4%	77.0%	68.2%	37.0%	68.2%
2011-2012	66.0%	81.1%	82.9%	77.7%	65.6%	36.0%	65.4%
% Change 2005-2012	-1%	-1%	-2%	1%	-4%	-3%	-4%
Master's degrees							
2000-2001	25.8%	15.6%	12.6%	13.3%	26.3%	53.4%	30.4%
2005-2006	27.0%	15.6%	12.6%	14.2%	26.7%	60.3%	31.4%
2011-2012	27.8%	16.5%	14.1%	14.1%	29.7%	60.6%	34.2%
% Change 2005-2012	3%	6%	12%	-1%	11%	0%	9%
Doctoral degrees							
2000-2001	6.5%	2.4%	3.7%	8.8%	3.8%	2.6%	0.3%
2005-2006	6.2%	2.1%	3.0%	8.8%	5.1%	2.6%	0.4%
2011-2012	6.3%	2.4%	3.0%	8.2%	4.7%	3.4%	0.5%
% Change 2005-2012	1%	15%	2%	-6%	-8%	30%	23%

Environmental Scan- External

- As a percentage of total degrees conferred during that given year, every concentration posted above witnessed a decreased number of degrees conferred at the bachelor's level except the natural sciences and mathematics.
- Students whom received a master's degree in the Social sciences increased 12% since 2005.
- Master level degrees and Doctoral degrees are beginning to make up a larger share of total degrees conferred. This could be in relation to current market demands, or the growing influx of international students.

Actual and projected numbers for student enrollment						
				% Change	% Change	% Change
	2010	2015	2020	2010-2015	2015-2020	2010-2020
14-17	1%	1%	1%	-5%	-5%	0%
18-19	21%	20%	20%	-5%	-2%	-3%
20-21	21%	20%	19%	-5%	-4%	-8%
22-24	17%	18%	17%	5%	-6%	-2%
25-29	14%	15%	15%	4%	-1%	5%
30-34	8%	8%	9%	1%	-4%	5%
35+	17%	18%	19%	3%	5%	8%

IPEDS

- We are expecting a slight change in the age distribution of students enrolled in postsecondary education in the next 6 years.
- The biggest increase is for those whom are 35 years or older.

Projected number of degrees conferred				
Year	Bachelor's Degree	Master's degree	Doctoral degree	Total:
2015-2016	1,870,000	817,000	182,400	2,869,400
2016-2017	1,886,000	836,000	185,200	2,907,200
2017-2018	1,902,000	857,000	187,500	2,946,500
2018-2019	1,922,000	879,000	190,000	2,991,000
2019-2020	1,948,000	898,000	192,800	3,038,800
2020-2021	1,976,000	915,000	195,500	3,086,500
2021-2022	2,004,000	930,000	197,400	3,131,400
% Change				
2015-2021	7%	14%	8%	9%

- All three degree levels are expected to increase over the coming 6- 7 years.
- Students receiving a master's level degree is expected to increase 14% from 2015-2021.

Implications:

- The fastest growing major, health practices, is not a major offered at UWest.
 - The demand for business degrees will continue to increase well into the future. However, more students are starting to enroll in to master's and doctoral business programs than before.
 - Most of the programs we offer at UWest are expected to increase in number of degrees conferred. Number of degrees conferred is a good metric to gauge demand for a program.
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Sources:

Digest of Educational Statistics, National Center for Educational Statistics, 2012.

Environmental Sector: Educational

External Force/issue: Enrollment Trends in Higher Education

Key Trends:

- The number of white students as a proportion of the total student population has declined since 2000.
- Hispanic students as a percentage of the total student population has increased the most at 40% since 2000.

Total fall enrollment in degree-granting postsecondary institutions						
	Fall enrollment (in thousands)			% of all students, total		
	2000	2005	2012	200	2005	2012
All Students, Total	15,312	17,488	20,643	100%	100%	100%
White	10,462	11,495	11,981	68%	66%	58%
Black	1,730	2,215	2,962	11%	13%	14%
Hispanic	1,461	1,882	2,979	10%	11%	14%
Asian/ Pacific Islander	978	1,134	1,259	6%	6%	6%
American Indian/ Alaskan Native	151	176	173	1%	1%	1%
Two or more races	0	0	505	0%	0%	2%
Non-resident Alien	528	545	783	3%	3%	4%

Digest of Educational Statistics, IPEDS

- The number of international students, or non-resident students, increased 48% since 2000. We expect this number to continue to increase well into the future.

Total fall enrollment in degree-granting postsecondary institutions, student enrollment status						
	Fall enrollment			% of all students, total		
	2000	2005	2012	200	2005	2012
All Students, Total	15,312,289	17,487,475	20,642,819	100%	100%	100%
Full-time	9,009,600	10,797,011	12,737,013	59%	62%	62%
Part-time	6,302,689	6,690,464	7,905,806	41%	38%	38%

Digest of Educational Statistics, IPEDS

Environmental Scan- External

- The majority of students are enrolling full-time. However, that proportion has become stagnate since 2005. It will be interesting to see in which direction this proportion slides in the coming years.

Total fall enrollment in degree-granting postsecondary institutions, gender						
	Fall enrollment			% of all students, total		
	2000	2005	2012	200	2005	2012
All Students, Total	15,312,289	17,487,475	20,642,819	100%	100%	100%
Male	6,721,769	7,455,925	8,919,087	44%	43%	43%
Female	8,590,520	10,031,550	11,723,732	56%	57%	57%

- Women enrollment has increased at a faster rate than males. Women now make up 57% of the student population in post-secondary education.

Total fall enrollment in degree-granting postsecondary institutions, gender						
	Fall enrollment			% of all students, total		
	2000	2005	2012	200	2005	2012
All Students, Total	15,312,289	17,487,475	20,642,819	100%	100%	100%
Public Institutions	11,752,786	13,021,834	14,880,343	77%	74%	72%
Private Institutions, total	3,559,503	4,465,641	5,762,476	23%	26%	28%
non-profit	3,109,419	3,454,692	3,953,578	20%	20%	19%
for profit	450,084	1,010,949	1,808,898	3%	6%	9%

Digest of Educational Statistics, IPEDS

- The number of students that enrolled in public institutions increased nearly 27% since 2000. However, enrollment in public institutions as a percentage of total enrollment in postsecondary institutions has decreased nearly 7% during the same duration of time.
- The number of students enrolled in private institutions increased 62% since 2000. In Addition, student enrollment in private institutions as a proportion of total students enrolled in postsecondary education increased from 23% in 2000 to 28% in 2012, which is a 22% increase.
- The number of students enrolled in private, for-profit institutions witnessed the largest increase in enrollment at a 302% growth rate since 2000. Enrollment in private, for-profit institutions now represents 9% of total enrollment in postsecondary institutions, which is 6 percentage points higher than its 2000 ranking.

Implications:

- Student enrollment by ethnicity is changing in a dynamic way. Today, there are more students of a different ethnicity enrolled in postsecondary institutions than ever before in history.
 - Non-white students as a whole is on pace to replace the white-only student population sometime in the near future.
 - International students are increasing by the thousands. Many universities are inclined to recruit international students to offset the costs of enrolling domestic students.
 - There are more woman as a proportion to men in higher education; however that proportion seems to have plateaued in 2005.
 - Public institutions witnessed a slight decline in enrollment as a proportion of total enrollment in postsecondary institutions. Private, for-profit institutions beheld the largest increase in enrollment since 2000.
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Sources:

Digest of Educational Statistics, National Center for Educational Statistics, 2012.

Environmental Scan- External

Environmental Sector: Educational

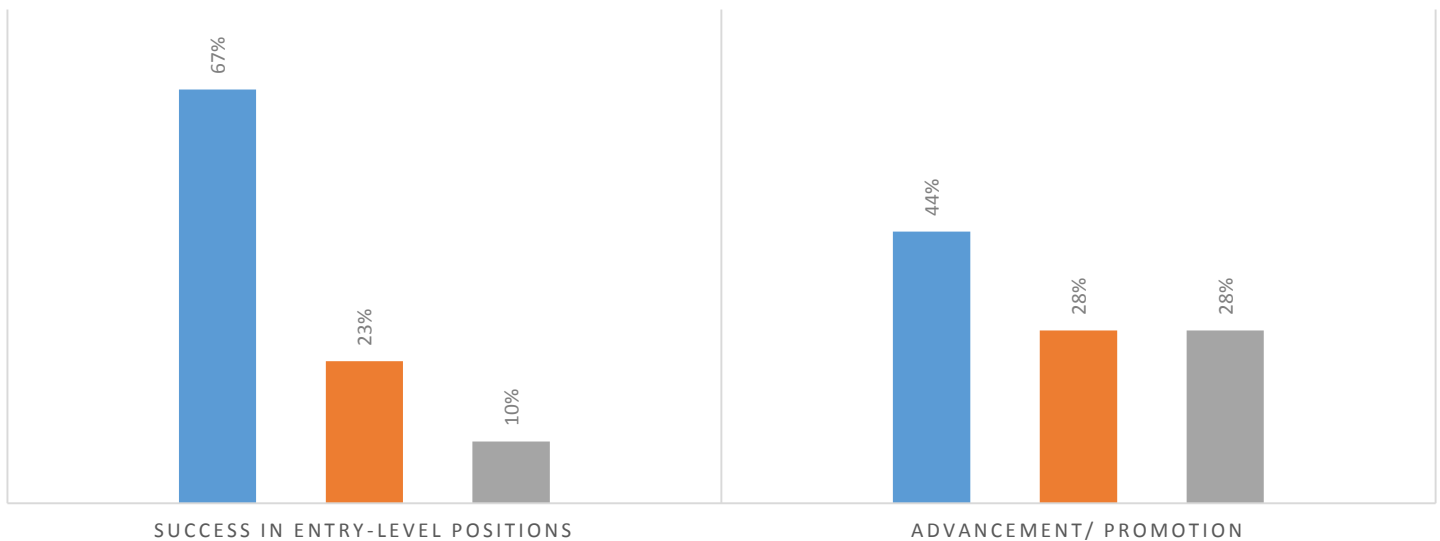
External Force/issue: Employer Expectations

Key trends:

- Employers prioritize critical thinking, communication, and complex problem-solving skills over a job candidate’s major field of study.
- Employers believe that in today’s global market, critical thinking as well as a broad set of skills are in high demand.
- Employers believe that innovation is key to an organizations success. Thus, they are looking for employees that could contribute to this endeavor.
- Majority of employers believe that an ideal employee should possess industry specific knowledge and skills, as well as a broad range of knowledge and skills.
- 56% of employers surveyed by AAC&U believe that higher education institutions are doing a “good” job preparing students for the modern economy.

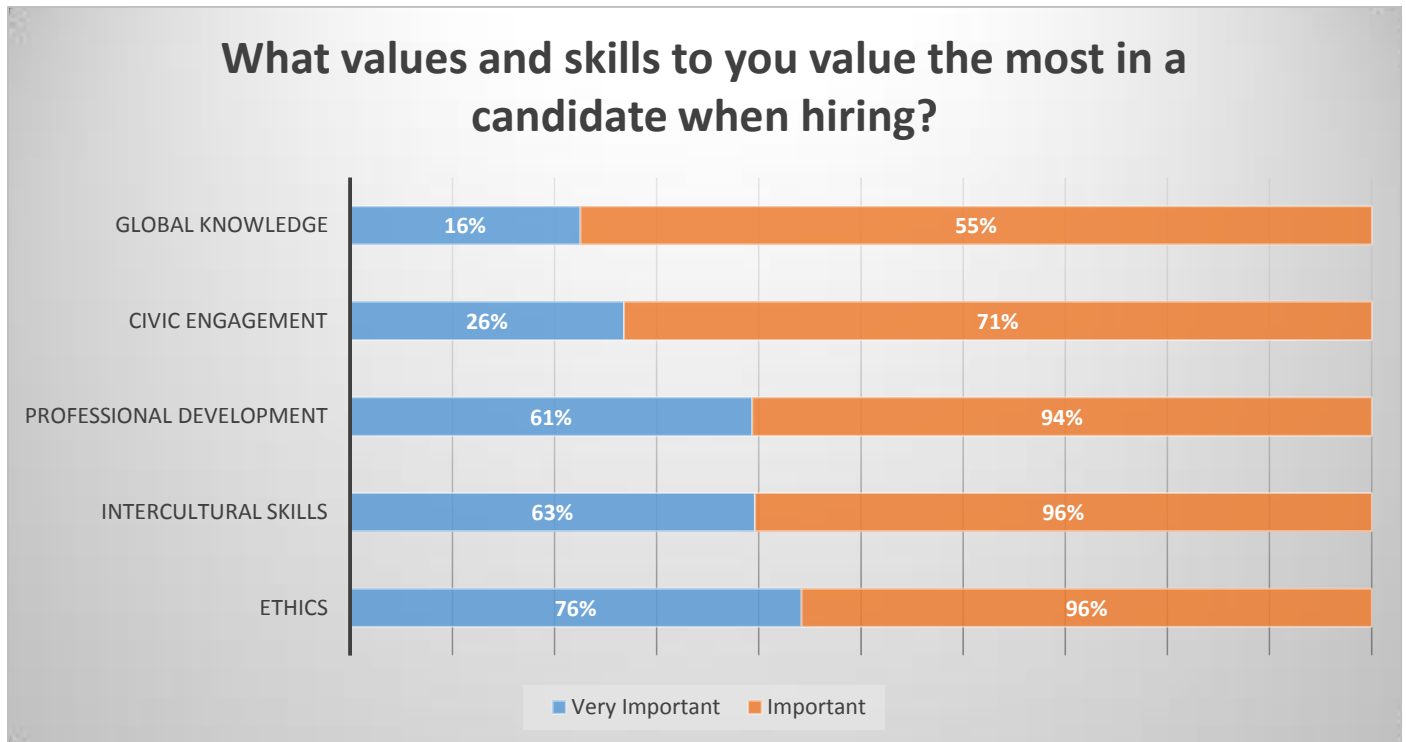
WHAT PORTION OF APPLICANTS FOR POSITIONS AT YOUR COMPANY IN THE PAST FEW YEARS POSSESS THE FULL SET OF SKILLS AND KNOWLEDGE NEEDED FOR THIS?

■ All/ most college graduate
 ■ About half of college graduates
 ■ Only some/ very few college graduates



Environmental Scan- External

- 67% of employers stated that all or most college graduates are well prepared for entry level positions; however, only 44% claimed that recent graduates are prepared for advancement or promotion within their organizations.



- Most employers expressed extreme importance in a college graduate’s ability to incorporate values such as ethics (76%), intercultural skills (63%), and professional development (61%).
- Few employers emphasized civic engagement or global knowledge as important values a recent graduate should possess.
- I find it interesting that employers value intercultural skills but not global knowledge.
- Professional development is when the employee takes the initiative to extend his learning and acquisition of new knowledge and skills. Professional development is a key component to promotion and advancement in any industry.
- Many corporations value teamwork and as more employees from many different ethnic backgrounds continue to be employed in all facets of employment, recent graduates will need to be able to coordinate projects with them effectively.

Employers say colleges should place varying degrees of emphasis on selected learning outcomes

	More	Less	Same
	%	%	%
Critical thinking and analytical thinking skills	82%	7%	11%
The ability to analyze and solve complex problems	81%	6%	13%
The ability to effectively communicate orally	80%	8%	12%
The ability to effectively communicate in writing	80%	8%	12%
The ability to apply knowledge and skills to real-world settings	78%	6%	16%
The ability to locate, organize, and evaluate information from multiple sources	72%	9%	19%
The ability to innovate and be creative	71%	9%	20%
Teamwork skills and the ability to collaborate with others in diverse group settings	67%	11%	22%
The ability to connect choices and actions to ethical decisions	64%	9%	27%
Knowledge about science and technology	56%	9%	35%
The ability to work with numbers and understand statistics	55%	10%	35%
Proficiency in a language other than English	43%	18%	39%
Knowledge about global issues and developments and their implications for the future	40%	15%	45%
Knowledge about the role of the United States in the world	35%	18%	47%
Knowledge about cultural diversity in the United States and in other countries	33%	22%	45%
Civic knowledge, civic participation, and community engagement	30%	18%	52%
Knowledge about Democratic institutions and values	27%	20%	53%

- Critical thinking and analytical skills, the ability to solve complex problems, and the ability to communicate effectively orally and in writing were the top four strongly emphasized outcomes colleges should utilize more in their curriculum.
- The ability to speak more than one language, cultural understanding, and civic responsibility were amongst the learning outcomes that employers felt should be valued less in the postsecondary curriculum.
- 83% of the employers surveyed agreed that a portfolio of work that demonstrates a student’s core competencies would be useful for students during the application process.
- A significant proportion of employers either already have a partnership with a local university to provide internships or are fairly interested in developing a relationship with a local university.
- Employers are more interested in building a reciprocal relationship via hosting internships for the university than working closely with the career service advisor, participate in curriculum review, or evaluate a “real-life” project.
- 94% of employers that responded to the survey indicated that a liberal arts education was still important. 51% indicated it was very important.

Implications:

- Employers are generally satisfied with the work post-secondary institutions are doing in preparing students for the work force.
 - Employers claim that they need graduates with some industry knowledge, but they also want employees that can think critically and analytically.
 - Employers need innovative thinkers and well-rounded individuals.
 - University of the West's mission is in line with the current employer demand. The whole-person education is what employers are looking for in graduates.
 - The liberal arts education seems to be in high demand from employers. An interdisciplinary undergraduate degree might be well positioned to meet these demands.
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Sources:

Hart Research Associates, It Takes More than a Major, 2013.
