

External Environmental Scan

Overview

In order to plan for the future of Folsom Lake College (FLC), it is imperative to understand the external environment in which the college operates. This report considers some significant external environmental factors that are likely to impact the future of FLC. Understanding the external trends and conditions identified in this report will enhance decision-making processes at FLC as we plan for the college's sustainability, viability, and growth.

The College in Relationship to the World

"We live in an era in which everything is possible and nothing is certain... These conditions predominate in world politics largely because power is being dispersed not only across nations but across cultures. *Education is the medium of that exchange.*"¹

Global Ranking of Educational Attainment

It is well understood the post-secondary education is critical not only to world politics, but to economic, social, and environmental stability. There are numerous international indices aimed at ranking cognitive skills and educational attainment levels by country and in nearly every index the United States ranks below the top 10 performing countries in post-secondary educational attainment. Trends suggest that the U.S. will continue to lose its footing as other countries expand and diversify educational opportunities for their citizens. These global findings are pushing policy makers and educators in the U.S. to make post-secondary education a subject of national discussion and debate.

Accelerating Rate of Change

The accelerating rate of change in the world is key external factor to consider in planning process. In the past decade, there have been rapid advances in technology, medicine, and science; quickly changing governance policies and regulations; increasingly volatile economic cycles; and uncertain weather patterns.² Nowhere is change more prominent than in the rapid rise of the "mobile" society. The use of the Internet, smart phones, video on demand, e-books and other technological applications and devices has changed social norms, access to information, and the now 24/7 nature of service delivery. All of these changes impact the education delivery system. Some of key forces that are driving change in higher education include: the abundance of quality content on the web, interactive applications and platforms, and mobile devices with Internet connectivity.³ These forces are likely to lead to more alternatives to the traditional college experience, especially in developing countries.

¹ 1999. *Higher Education in the 21st Century: Global Challenge and National Response*. Institute of International Education and the Boston College Center for International Higher Education. <file:///C:/Users/w1544407/Downloads/Research-Report-029.pdf>

² 2010. *Key Issues for Planning: Los Rios Community College District*. Office of Institutional Research. http://irweb.losrios.edu/do_research/KeyIssuesReports/KeyIssuesforPlanning_2010/KeyPlanningIssues2010forweb.pdf

³ 2012. *Three big changes ahead for higher education*. Online Learning Insights. <https://onlinelearninginsights.wordpress.com/2012/11/24/three-big-changes-ahead-for-higher-education/>

The College in Relationship to the Nation

The vital role of education to the nation's economy and status as a world leader is a topic of on-going discussion in U.S. politics. Recently, the importance of the community college system in educating the nation's future workforce has been brought into the spotlight. President Obama's education agenda has challenged community colleges to educate and graduate 5 million more students by 2020. The President has also proposed billions in funding to make two years of community college tuition free: "Community college should be free for those willing to work for it – because in America, a quality education cannot be a privilege that is reserved for a few. I think it's a right for everybody who is willing to work for it."⁴

National Economy

The national economy is making solid progress in recovery from the deep recession. The major indicators of economic stability, such home prices, gross domestic product, jobs and industrial production have all risen dramatically. Median household incomes have not returned to their pre-recession highs, but they are steadily improving. National unemployment rates have dropped dramatically, from a high of 10.1% in 2009 to a current rate of 5.1%. During the recession, there were significant declines in federal funding for higher education and nation-wide increases in tuition rates. Although there have been increased appropriations for higher education in the past two years, the rates have yet to be restored to pre-recession funding levels.

Workforce Gaps

One of the most significant issues prompting the national discussion of post-secondary educational needs in the United States is the looming workforce gap that will be left as the "Baby Boomer" generation retires. The U.S. Census Bureau defines the Baby Boom generation as those born between 1946 and 1964; during this time nearly 76 million American children were born. The generations following the Baby Boomers were significantly smaller. The first wave of Baby Boomers reached retirement age in 2011 and many industries are already feeling the impact. The higher education workforce is facing massive losses of experienced faculty, staff and managers. Within the Los Rios Community College District (LRCCD), over one-third of administrators are aged 60 or above, and one-third of tenured faculty are aged 55 or above.⁵

Changing Workforce Training Needs

Over the last few decades, there has been a significant shift in the workforce training needs in American industry. In the past, a high school diploma was sufficient to secure a middle-class income and support in family; in today's workforce, a certificate or degree is essential for reaching a middle class status. "In 1973, workers with a post-secondary education held only 28% of jobs; by comparison, they held 59% of jobs in 2010 and will hold 65% of jobs in 2020. At the current production rate, the United States will fall short of 5 million workers with post-secondary education by 2020. While opinions vary on how to increase educational attainment, the overwhelming consensus is that more workers than ever before

⁴ 2015. *Remarks by the President on America's College Promise*. <https://www.whitehouse.gov/the-press-office/2015/01/09/remarks-president-americas-college-promise>

⁵ 2010. *Key Issues for Planning: Los Rios Community College District*. Office of Institutional Research. http://irweb.losrios.edu/do_research/KeyIssuesReports/KeyIssuesforPlanning_2010/KeyPlanningIssues2010forweb.pdf

will require post-secondary credentials to ensure their economic vitality.⁶ The community college system plays a vital role in providing students with the necessary post-secondary education for a growing number of occupations that require a certificate or degree.

Rising Demand for Accountability

There is a growing demand for enhanced outcome-based accountability measures across the educational system in the United States. The demand for accountability in post-secondary education is fueled by the increasing costs of higher education, declining graduation rates, global reporting of the U.S. decline in educational attainment of its citizens, and an increased perception by pundits and the general public alike that higher education may no longer offer the value that it once did. Community colleges are perhaps under the greatest scrutiny as open access policies extend postsecondary educational opportunities to many traditionally underserved populations, but completion and transfer rates reflect a lack of equity across key demographics. Community college leaders, government groups and think tanks are focused on improving student performance at the community college level, with special consideration given to strategies to address equity gaps and increase the national degree attainment rate. The American Association of Community Colleges has launched the 21st-Century Initiative, a national call to action to “redesign, reinvent, and reset” the community college experience, with a primary focus on accountability.

Education as a Pathway to Social Justice

The Bill & Melinda Gates Foundation is the world’s largest private grant-making foundation and the nation’s leading advocate for education reform. The goal of the Gates Foundation’s postsecondary education reform projects is to get more students to and through college, and through that effort lift more Americans out of poverty. The Gates Foundation states that:

Public higher education in the United States is at a watershed moment. As educational costs rise and colleges and universities face growing financial pressures, the education gap is widening and public student financial aid systems are getting stretched to the limit – all of this at a time when our economy needs more college-educated workers than ever before. Left unabated, these trends will leave the U.S. economy without the skilled workforce it needs to remain competitive and will likely increase the education gap between those from low-income backgrounds and the rest of the population. Given the role that higher education has historically played as an engine of social mobility and economic growth, the political implications for our nation, and particularly for lower-income people, are profound and unacceptable.⁷

The community college system was created with an aim towards social justice. Early proponents of community college envisioned these institutions as playing the civic role of democratizing higher education by providing open access to all students. Although the mission and roles of the community college have undergone many transformations, the underlying vision of access and equity remain at its

⁶ 2015. *A strong economy through post-secondary education: Introduction*. The N.C. Center for Public Policy Research. <http://ncinsight.nccppr.org/2015/06/a-strong-economy-through-post-secondary-education-introduction>

⁷ 2015. *Postsecondary Success: Strategy Overview*. Bill & Melinda Gates Foundation. <http://www.gatesfoundation.org/What-We-Do/US-Program/Postsecondary-Success>

core. Community colleges are the backbone of the U.S. higher education system, enrolling nearly 40% of all college students in the nation each year, and a high percentage of those are traditionally underserved populations. For millions of Americans, access to the community college system is an essential pathway to the middle class.

Arne Duncan, U.S. Secretary of Education strongly supports the view of education as a pathway to social justice: "... the country that out-educates us today is going to out-compete us tomorrow. Education is the key to our long-term economic prosperity. *But education is more than an economic issue. It's the civil rights issue of our generation.*"⁸

The College in Relationship to the State

California, like many of states, is experiencing an unsteady economic recovery. Some cities and regions within the state have shown significant economic recovery, while other areas have been identified as among the slowest-recovering communities in the country. Wage growth in California remains slow, and the state unemployment rate continues to hover about 2 percentage points higher than the national average. But even with the unsteady recover, the State of California has stabilized its economy and has begun to restore funding to many vital community services.

CCC Funding

During the recession, the State cut funding to the California Community College (CCC) system by \$1.5 billion.⁹ Course offerings were cut statewide by nearly 25% due to five consecutive years of deep budget cuts. It is estimated that nearly 500,000 students were shut out of the CCC system due to budgetary constraints. The first restorative budget measures were seen in 2013-14 with nearly \$500 million directed to specific needs such as Adult Education, COLAs, DE Initiative, and increased access. The 2014-15 budget for CCCs included a 2.75% restoration of access funding (\$140 million), \$170 million for student success and equity programs, \$30 million for DSPS, \$47.3 million for COLAs, and many more millions directed to funding specific needs. The proposed budget for 2015-16 provides for continued increased funding to the CCC system, with a proposed 8% increase in the total CCC budget.

CCC Accountability

There is a high level of attention paid to outcome-based accountability measures in the CCC system. In 2004, Assembly Bill 1417 authorized the CCC Chancellor's Office to design and implement a performance measurement system for its colleges. The key system wide performance indicators include: student progress and achievement, workforce development, and pre-collegiate basic skills improvements. Some of the current statewide accountability projects and initiatives include:

- Student Success Initiative / Student Success Scorecard
- Basic Skills Initiative

⁸ 2010. "Call to Service" Lecture at Harvard University. U.S. Secretary of Education, Arne Duncan. <http://www.ed.gov/news/speeches/call-service-lecture-harvard-university>

⁹ 2015. *California Community College Key Facts*. California Community College's Chancellor's Office. http://www.californiacommunitycolleges.cccco.edu/Portals/0/DocDownloads/Articles/California_Community_Colleges_Key_Facts_Updated_1_16_15.pdf

- Common Assessment Initiative
- Education Planning Initiative
- Online Education Initiative
- Institutional Effectiveness Partnership Initiative
- Student Equity Plans
- Student Success and Support Plans

Beyond the accountability requirements monitored by the CCC Chancellor's Office, California community colleges must also meet accountability measures established by the Accrediting Commission for Community and Junior Colleges (ACCJC).

Population Growth

California's current population is approximately 39 million. The population is estimated to grow 4.4% by 2020 (41 million) and 13.3% by 2030 (44 million).¹⁰ Population growth in California has slowed significantly, likely a result of the recession. In 2010, it was estimated California would reach a population of 50 million by 2032; estimates have been revised and the 50 million mark is now estimated not be reached until 2055. The largest shifts in population are expected among the oldest and youngest Californians. The senior population will quadruple within the next 20 years, while the growth of children is projected to virtually halt.

Leveling Off of High School Graduates

Between 1990 and 2009, the national number of high school graduates increased by more than 35%, from 2.4 million to 3.3 million. The Western Interstate Commission for Higher Education (WICHE) has been producing high school graduate forecasts for over 30 years, and their projections indicate the era of annually increasing graduation rates has come to an end. California's production of high school graduates peaked in 2010-11 at over 430,000.¹¹ In just three years, California graduates dropped by 9%. It is estimated that the number of high school graduates will continue to decline, though inconsistently, at a more modest pace over the next decade. While the number of high school graduates is dropping statewide, a large housing development project within the city of Folsom is likely to significantly increase the total population of Folsom and thereby increase the number of local high school graduates in FLC's service area.

Prison Inmate Education

California's state prison facilities house more than 114,000 inmates. Research has shown that inmates who participate in educational programs are 43% less likely to return to prison; and every dollar invested in prison education programs saved nearly 5 dollars on later incarceration costs.¹² In 2014, California passed legislation (SB1391) that called for collaboration between prison and community college officials to provide college instruction in the prison setting. Folsom Lake College was one of four

¹⁰ 2014. *Summary Population Projects by Race/Ethnicity and by Major Age Groups*. CA Department of Finance. <http://www.dof.ca.gov/research/demographic/reports/projections/P-1/>

¹¹ 2013. *Knocking at the College Door: Projections of High School Graduates – California*. Western Interstate Commission for Higher Education. <http://www.wiche.edu/info/knocking-8th/profiles/ca.pdf>

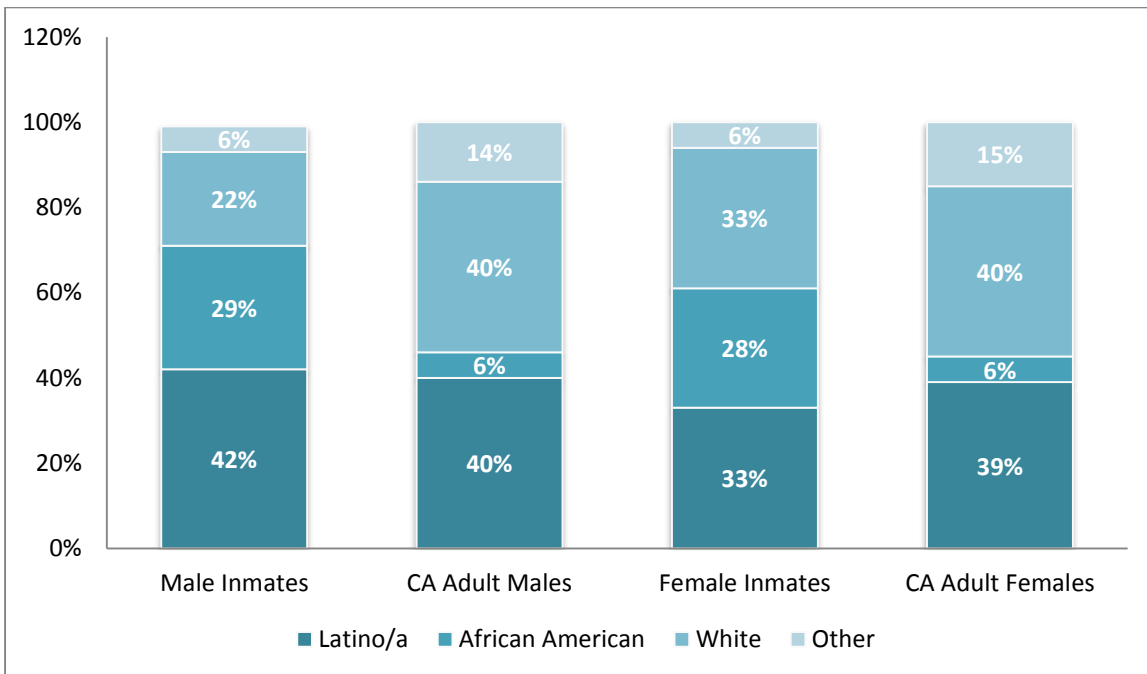
¹² 2013. *RAND Correctional Education Project*. RAND Corporation. Grant funded by the Bureau of Justice Assistance, Office of Justice Programs. <http://www.rand.org/jie/projects/correctional-education.html>

community colleges awarded a \$400,000 grant by the California Community College Chancellor’s Office (CCCCO) to develop a model program for educating incarcerated students. Grants funds will be used for program development and implementation, with the goal of improving post-release outcomes and reducing recidivism. Education services will provide training to the inmates in careers for which there are employment opportunities and for occupations that will likely not be impacted by their offenses.

FLC is providing face to face courses at both Folsom Women’s Facility (FWF) and Mule Creek State Prison. The CCCCCO grant is specific to inmate education at FWF; the Mule Creek inmate education program is being developed con-currently but is not supported by grant funding. The FWF is adjacent to the Folsom State Prison; it currently houses about female 475 inmates within a medium level security setting. The FWF inmates will be offered Small Business Entrepreneurship certificate and degree coursework. The certificate courses are all applicable to the degree, allowing inmates who are released to continue their education at FLC. Mule Creek State Prison is located in Lone. There are an estimated 2,800 inmates incarcerated in that all male facility, with a range from low risk to serious offenders with life sentences. Mule Creek inmates will be offered Human Services certificate and degree coursework.

Demographic data is not available specific to these local prisons, but statewide data¹³ shows that the demographic features of adults in the California general population differ significantly from the inmate population.

Chart 1: Racial/Ethnic Background of CA Inmates by Gender



¹³ 2015. *Just the Facts: California’s Changing Prison Population*. Public Policy Institute of California. http://www.ppic.org/main/publication_show.asp?i=702

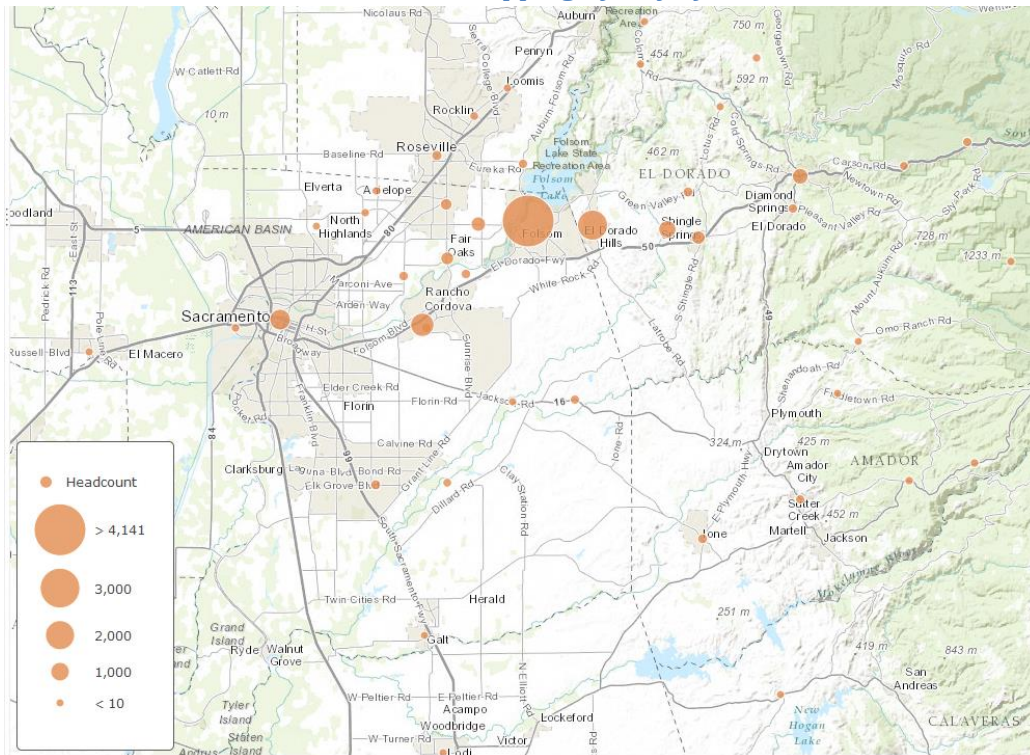
The College in Relationship to the Local Region

Service Area: Geography

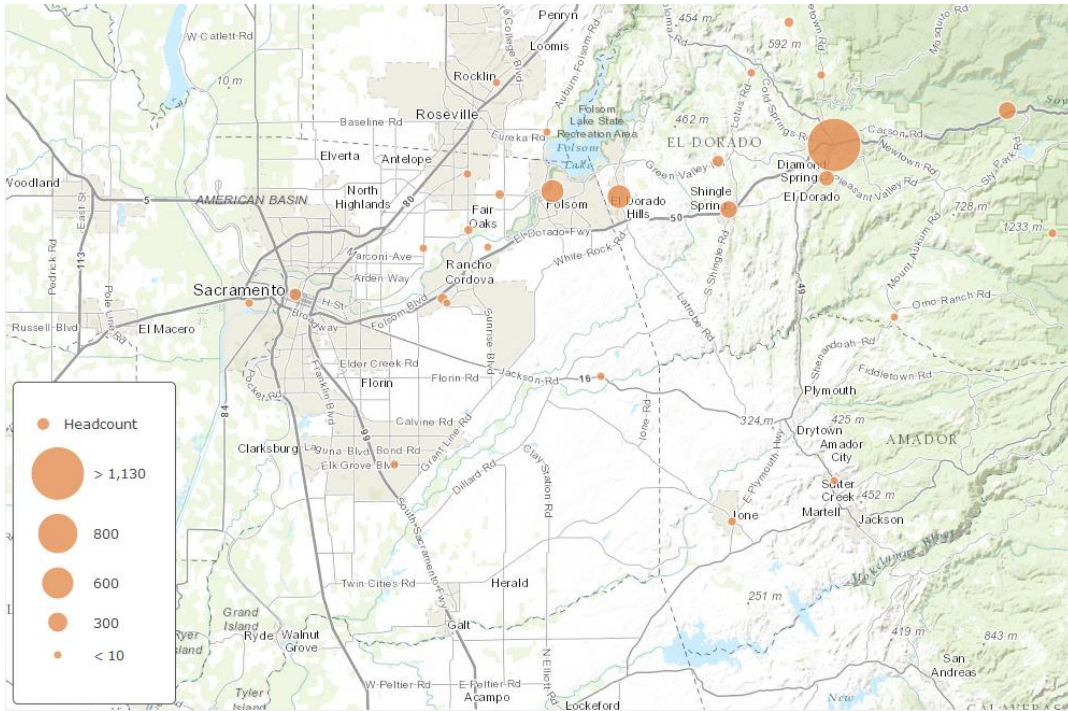
Folsom Lake College currently serves more than 8,700 students across its three sites. The FLC service area extends along the Highway 50 corridor as far as Rancho Cordova to the west and well beyond Placerville to the east. The service area also extends to the northwest boundary of the American River College service area, northeast to the service boundary with Sierra College and Lake Tahoe College, as well as south to the service boundary with Sacramento City College. Within the Los Rios Community College District, Folsom Lake College has the largest and most geographically diverse service area.

The demographic and socioeconomic features of the communities surrounding each of the college’s three sites are sufficiently different that the college refers specifically in its strategic plan and other documents to the “three communities” it serves. The main campus (FLC-main) primarily serves the cities of Folsom and El Dorado Hills. The El Dorado Center (EDC) serves primarily serves the city of Placerville and the surrounding rural areas. The Rancho Cordova Center (RCC) serves primarily serves the city of Rancho Cordova.

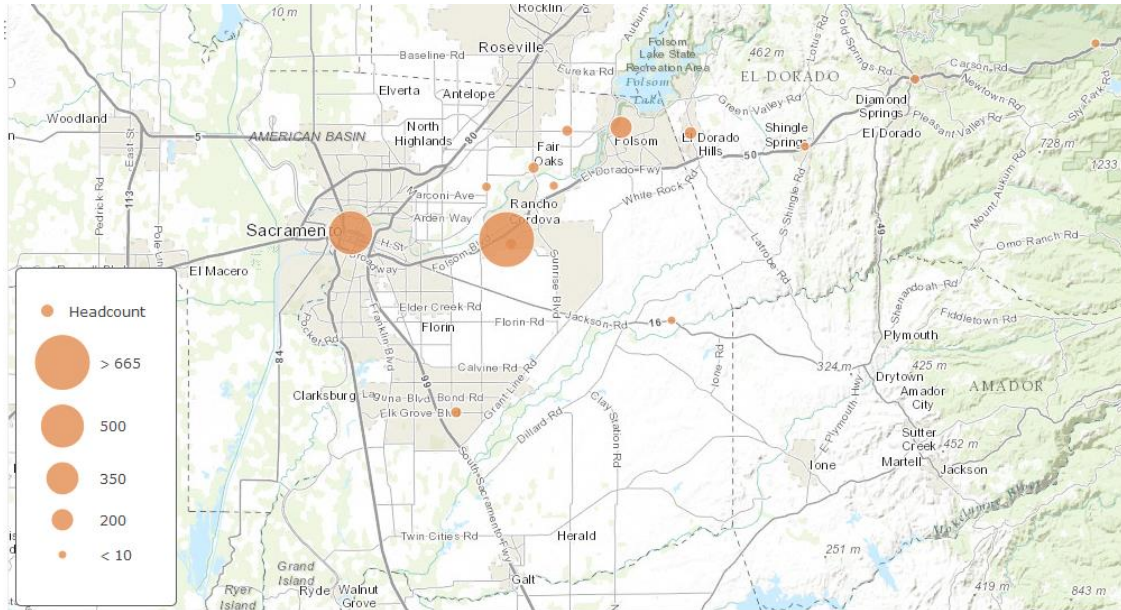
FLC – Main: Student Mapping by City of Residence



El Dorado Center: Student Mapping by City of Residence



Rancho Cordova Center: Student Mapping by City of Residence



Service Area: Demographics

Socioeconomic Status Indicators

Socioeconomic indicators vary greatly between Folsom Lake College’s communities of service. The cities of Folsom and El Dorado Hills are affluent communities, where home prices are high and median incomes are significantly higher than the statewide average. Placerville is a small, rural community with the lowest median income and highest level of poverty within the three communities of service. Rancho Cordova is adjacent to Sacramento and reflects a more urban population, with high unemployment and poverty rates, and with the greatest percentage of persons having no health care coverage.

Table 1: Service Area - Socioeconomic Status Indicators¹⁴

		Median Household Income	Median House Price	% Below Poverty Level	% No Health Insurance Coverage	Unemployment Rate
FLC-Main	Folsom	\$98,359	\$385,000	4.6%	6.5%	5.7%
	El Dorado Hills	\$119,025	\$480,000	3.8%	4.9%	5.7%
EDC	Placerville	\$44,096	\$238,500	18.4%	12.1%	9.4%
RCC	Rancho Cordova	\$52,152	\$191,300	17.8%	15.8%	10.1%
State of California		\$61,094	\$366,400	15.9%	17.8%	7.3%

Ethnicity

There is also wide variance in the racial/ethnic backgrounds of residents in FLC’s three communities of service. Residents of Folsom, El Dorado Hills and Placerville are most likely to be White. Placerville and Rancho Cordova have large Hispanic/Latino populations. Folsom, El Dorado and Rancho Cordova have significant Asian populations. Overall, the Folsom Lake College service area reflects a more homogenous and less ethnically diverse community profile than the other colleges in the Los Rios Community College District and the statewide profile.

Table 2: Service Area - Ethnicity Profile

		American Indian / Native Alaskan	Asian	Black	Hispanic / Latino	Multi-Ethnic	Other	White
FLC-Main	Folsom	0.5%	13.3%	6.0%	12.2%	3.3%	1.0%	63.8%
	El Dorado Hills	0.0%	9.2%	1.9%	7.7%	4.3%	.10%	76.7%
EDC	Placerville	2.8%	1.7%	0.4%	21.7%	2.9%	0.0%	70.6%
RCC	Rancho Cordova	0.3%	12.0%	10.1%	19.2%	5.2%	1.1%	52.1%
State of California		0.4%	13.1%	5.7%	37.9%	2.6%	0.6%	39.7%

¹⁴ 2013. American Community Survey. U.S. Census Bureau. <http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

Age

The median age in California is 35.4 years. The city of Rancho Cordova has a median age significantly lower than the state-wide average. The cities of Folsom, El Dorado Hills and Placerville have higher median age ranges. The percentage of older adults eligible for social security benefits (age 62+) is highest in Placerville and El Dorado Hills. Folsom and Rancho Cordova have fewer older adults than the statewide average.

Table 3: Service Area - Age Profile

		Total Population	Median Age	% 18 years and over	% 62 years and over
FLC-Main	Folsom	72,424	37.7	76.1%	12.2%
	El Dorado Hills	44,206	40.7	71.2%	15.8%
EDC	Placerville	10,383	39.4	76.6%	19.2%
RCC	Rancho Cordova	66,027	33.8	74.3%	13.5%
State of California		37,659,181	35.4	75.5%	14.7%

Source: U.S. Census Bureau, 2013 American Community Survey

Educational Attainment

In the state of California, 81.2% of adults have achieved the educational level of high school graduate or higher. All three of FLC’s communities of service exceed that state-wide average: Folsom = 92.6%, El Dorado Hills = 97.7%, Placerville = 88.7%, and Rancho Cordova = 87.7%. Residents of Folsom and El Dorado are significantly more likely to have a Bachelor’s Degree or higher compared to residents of Placerville or Rancho Cordova.

Table 4: Service Area – Educational Attainment

		Less than 9 th grade	9 to 12 th grade, no diploma	HS graduate (includes GED)	Some College, No Degree	Associate’s Degree	Bachelor’s Degree	Graduate or Professional Degree
FLC-Main	Folsom	1.6%	5.9%	17.4%	21.3%	9.2%	27.8%	16.9%
	El Dorado Hills	1.4%	1.0%	13.1%	22.5%	9.7%	35.0%	17.4%
EDC	Placerville	4.0%	7.4%	31.1%	27.0%	10.0%	12.6%	8.0%
RCC	Rancho Cordova	5.1%	7.2%	23.9%	28.5%	9.9%	17.9%	7.5%
State of California		10.2%	8.5%	20.7%	22.1%	7.8%	19.4%	11.2%

Source: U.S. Census Bureau, 2013 American Community Survey (population 25 years and over)

Local High School Graduates at FLC

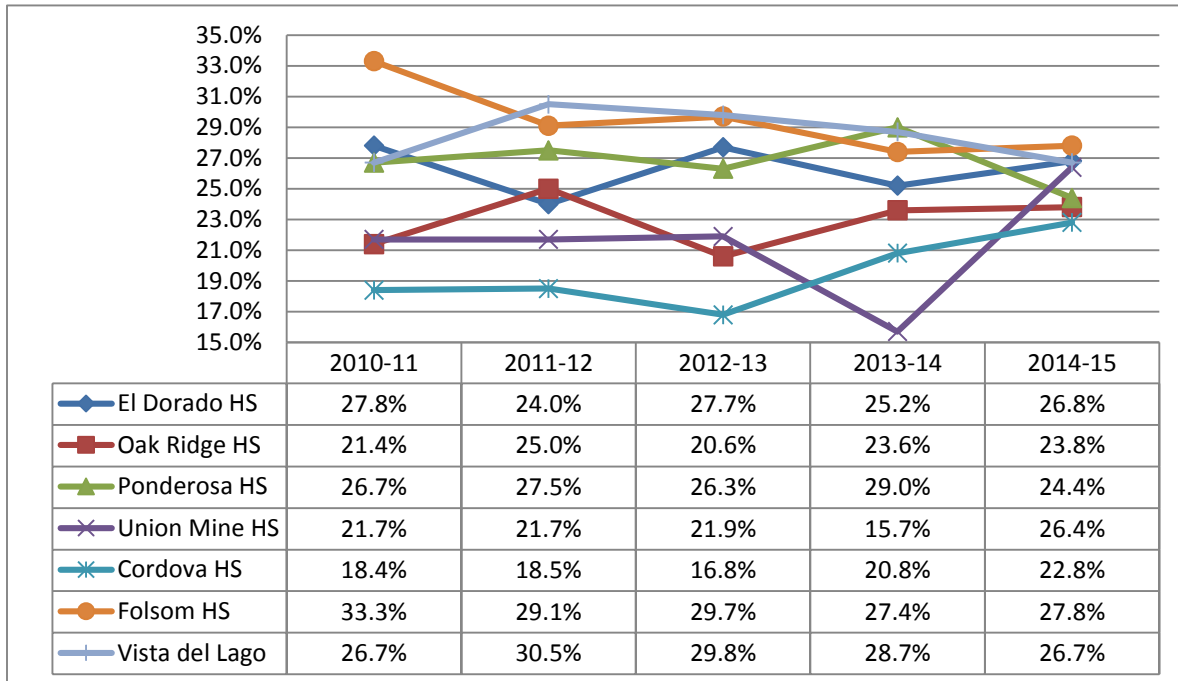
The number of students graduating from local feeder high schools has remained relatively stable over the past 5 year period. Data from twenty one local feeder high schools is captured in Table 5. The average number of high school graduates per year across the five year reporting period was 6,820. During that same reporting period, the average number of high school students that transition to FLC was 13.4%.

Table 5: Local HS Graduates at FLC

District	School	Class 2010	# Enrl'd FLC	Class 2011	# Enrl'd FLC	Class 2012	# Enrl'd FLC	Class 2013	# Enrl'd FLC	Class 2014	# Enrl'd FLC	Class 2014 Enroll Rate	5 year Avg. Enroll Rate
Amador County Unified SD	Amador HS	168	18	174	13	136	20	134	12	144	18	12.5%	10.7%
	Argonaut HS	125	15	114	17	126	17	122	9	129	16	12.4%	12.0%
Black Oak Mine Unified SD	Golden Sierra HS	143	25	105	15	125	22	119	15	105	13	12.4%	15.1%
El Dorado Union HS District	El Dorado HS	263	73	262	63	318	88	262	66	299	80	26.8%	26.4%
	Oak Ridge HS	505	108	503	126	533	110	534	126	530	126	23.8%	22.9%
	Ponderosa HS	412	110	371	102	452	119	421	122	398	97	24.4%	26.8%
	Shenandoah HS	18	6	11	2	12	5	26	7	11	5	45.5%	32.1%
	Union Mine HS	263	57	217	47	215	47	223	35	235	62	26.4%	21.5%
Elk Grove Unified DS	Elk Grove HS	415	1	417	1	372	2	383	5	388	4	1.0%	0.7%
	Pleasant Grove HS	443	29	465	36	474	28	554	32	519	38	7.3%	6.6%
	Sheldon HS	484	3	527	3	482	2	497	0	528	5	0.9%	0.5%
Folsom-Cordova Unified SD	Cordova HS	402	74	325	60	370	62	337	70	369	84	22.8%	19.4%
	Folsom HS	423	141	413	120	431	128	401	110	432	120	27.8%	29.5%
	Vista del Lago HS	240	64	318	97	322	96	376	108	330	88	26.7%	28.6%
Sacramento City Unified	Rosemont HS	301	18	317	19	295	22	286	13	267	15	5.6%	5.9%
San Juan Unified	Bella Vista HS	414	20	374	20	423	39	430	35	455	34	7.5%	7.1%
	Casa Roble Fund.	308	18	299	16	335	20	317	25	276	24	8.7%	6.7%
	Del Campo HS	352	4	368	4	370	6	462	7	410	6	1.5%	1.4%
	Rio Americano HS	342	13	371	7	323	12	365	20	361	13	3.6%	3.7%
	San Juan HS	126	0	102	0	142	2	115	0	125	2	1.6%	0.7%
	Vision in Education	647	17	642	17	589	22	532	23	561	24	4.3%	3.5%
TOTAL:		6,794	814	6,695	785	6,845	869	6,896	840	6,872	874	14.4%	13.4%

The majority of new, first time students come high schools in the El Dorado Union Mine School District (El Dorado, Oak Ridge, Ponderosa, & Union Mine) and the Folsom Cordova Unified School District (Cordova, Folsom & Vista del Lago). The average enrollment rate for new, first time students coming from these top feeder schools is 25%.

Chart 2: Enrollment Rates for Top Feeder Schools



Workforce Characteristics of the Local Region

Employment Growth Projections

Employment growth projections estimate the changes in industry and occupational employment over time resulting from industry growth, technological change, and other factors. The California Employment Development Department produces long-term (10 year) projections of employment growth for the State and local areas¹⁵. Employment growth is reported by “fastest growing” occupations (new jobs from industry growth) and “largest growing” occupations (new jobs and replacement needs).

The fastest growing occupations that require some post-secondary training or an associate’s degree include heating & air conditioning mechanics, medical & clinical lab technicians, veterinary technicians,

¹⁵2014. 2012-2022 Projection Highlights Sacramento-Roseville-Arden-Arcade Metropolitan Statistical Area (El Dorado, Placer, Sacramento, and Yolo Counties). State of California, Employment Development Department. [http://www.calmis.ca.gov/file/indproj/sacr\\$_highlights.pdf](http://www.calmis.ca.gov/file/indproj/sacr$_highlights.pdf)

and other medical technicians. The largest growing occupations (i.e. those with the most job openings) that require some post-secondary training or an associated degree include registered nurses, heavy tractor/trailer truck drivers, medical assistants, and nursing assistants.

Table 6: Fastest Growing Occupations

Entry Level Education	Fastest Growing Occupations (2012-2022)	Projected % Increase	Projected # of Jobs	Applicable FLC Degree or Certificate	Aligned FLC Coursework
Some College, No Degree	Computer User Support Specialists	21.3%	670	CIS	
	Teacher Assistants	8.5%	810	ECE LIB. STUDIES – ELEM. ED.	
Postsecondary Non-degree Award	Heating & Air Cond. Mechanics / Installers	45.6%	670		
	Ophthalmic Medical Technicians	31.7%	130	MEDTEC	
	Surgical Technologists	30.4%	170		
	Medical Records & Health Info. Tech.	28.0%	230		
	Medical Assistants	27.7%	1,510	BIOL	
Associate’s Degree	Medical & Clinical Lab Technicians	35.8%	340	MEDTE	
	Veterinary Technologists & Technicians	34.3%	240	BIOL	
	Medical Equipment Repairers	29.2%	140		
	Web Developers	28.2%	290	CIS	
	Dental Hygienist	23.5%	500	BIOL	
Bachelor’s Degree	Interpreters and Translators	53.7%	340		ESL, FREN, SILA, SPAN
	Information Security Analysts	47.9%	230	CIS	
	Cost Estimators	46.8%	810	ACCT, MATH/STAT, MGMT, RE	
	Market Research Analysts / Specialists	40.9%	1,010	BUS, COMM, ENG, MKT	
	Dietitians and Nutritionist	32.7%	180	BIOL	NUTRI (AS-T in progress)
Master’s Degree	Physician Assistants	40.3%	250	BIOL	
	Rehabilitation Counselors	35.9%	230	PSYCH	SILA
	Healthcare Social Workers	34.4%	210	HSER, SOC	GERON
	Nurse Practitioners	31.8%	210	BIOL	
	Occupational Therapists	21.7%	100	PSYCH	

Table 7: Most Job Openings

Entry Level Education	Largest Growing Occupations	Projected # of Jobs	Applicable FLC Degree or Certificate	Aligned FLC Coursework
Some College, No Degree	Teacher Assistants	2,980	ECE LIB. STUDIES – ELEM. ED.	
	Computer Support Specialists	1,170	CIS	
	Computer/Teller/Office Machine Repairers	200		
Postsecondary Non-degree Award	Heavy and Tractor-Trailer Truck Drivers	2,590		
	Medical Assistants	2,550	BIOL	
	Nursing Assistants	2,000	BIOL	
	Licensed Practical and Vocational Nurses	1,440	BIOL	
	Dental Assistants	1,060	BIOL	
Associate’s Degree	Registered Nurses	6,350	BIOL	
	Dental Hygienists	1,040	BIOL	
	Preschool Teachers, Except Special Ed.	1,030	ECE LIB. STUDIES – ELEM. ED.	
	Medical and Clinical Lab Technicians	590	MEDTEC	
	Web Developers	450	CIS	
Bachelor’s Degree	General and Operations Managers	5,540	BUS, MGMT	
	Accountants and Auditors	4,300	ACCT	
	Elementary School Teachers	3,640	ECE LIB. STUDIES – ELEM. ED.	
	Management Analysts	3,400	MGMT, PRJMGMT	
	Computer Systems Analysts	3,360	CIS	
Master’s Degree	Ed., Guidance, School & Voc. Counselors	830	HSER, PSYCH	
	Instructional Coordinators	500	LIB. STUDIES – ELEM. ED.	
	Ed. Administrators, Elementary & Secondary	490	LIB. STUDIES – ELEM. ED.	
	Education Administrators, Postsecondary	370	BUS, MGMT	
	Urban and Regional Planners	370	MGMT, PRJMGMT	ANTH

Areas of Employment Decline

During the past decade, the Sacramento Region has seen declines in employment opportunities within some major industry sectors, including: mining and logging (-50%), manufacturing (-29%), construction (-39%), information (-25%), and financial activities (11%)¹⁶. As the housing market rebounds, it is anticipated both the financial and construction sectors will see recovery of job opportunities.¹⁷

Manufacturing in California has been declining for decades and is anticipated to remain a sluggish sector.¹⁸ Changes in technology have had a major impact on several specific jobs. Identified as the “most endangered jobs of 2015”, the table below reports projected workforce losses for jobs impacted by advances in technology.

Table 8: Most Endangered Jobs

Job Title	Projected Growth Outlook
Mail Carrier	-28%
Meter Reader	-19%
Farmer	-19%
Newspaper Reporter	-13%
Jeweler	-10%
Logging Worker	-9%
Flight Attendant	-7%
Drill Press Operator	-6%
Insurance Underwriter	-6%
Seamstress/Tailor	-4%

Major Employers in Region

The California Employment Development Department has identified a list of major employers within Sacramento County¹⁹ (see table below). The primary occupational industries of the region’s major employers include correction services, educational services, environmental services, government services, health care, and manufacturing.

¹⁶ 2014. SACTO: Sacramento Regional Report 2013-14. Center for Strategic Economic Research. <http://greater-sacramento.com/wp-content/uploads/2013/04/Graphic-Focus-Regional-Report.pdf>

¹⁷ 2014. *Sacramento’s Labor Market & Regional Economy: 2014 Outlook*. Institute for Business Research and Consulting; Sacramento State. http://www.cbaweb.cba.csus.edu/sacbusinessreview/Sacramento_Business_Review/Archives_files/SBR_Labor_Jan14.pdf

¹⁸ 2015. *California’s Future*. Public Policy Institute of California. http://www.ppic.org/content/pubs/report/R_215BKR.pdf

¹⁹ 2015. *Major Employers in Sacramento County*. CA State Employment Development Depart. <http://www.labormarketinfo.edd.ca.gov/majorer/countymajorer.asp?CountyCode=000067>

Table 9: Major Employers

Employer Name	Location	Industry
Aerojet Rocketdyne Inc.	Rancho Cordova	Aerospace Industries (Mfrs)
Air Resources Board Tstg Off	Sacramento	Engineers-Environmental
Ampac Fine Chemical LLC	Rancho Cordova	Chemicals – Manufacturers
California Prison Ind. Authority	Folsom	State Gvt – Correctional Institutions
California State University	Sacramento	Schools-Universities & Colleges Academic
Corrections Dept.	Sacramento	State Gvt – Correctional Institutions
Delta Dental Plan of Missouri	Rancho Cordova	Insurance
Dept of Transportation in CA	Sacramento	Government Offices - State
Disabled American Veterans	Sacramento	Veterans & Military Organizations
Employment Development Dept	Sacramento	Government – Job Training/Voc Rehab Services
Environmental Protection Agency	Sacramento	State Government – Environmental Programs
Exposition & Fair	Sacramento	Government Offices - State
Gen Corp Inc.	Ranch Cordova	Aerospace Industries (Mfrs)
Intel Corp	Sacramento	Semiconductor Devices (Mfrs)
Intel Corp	Folsom	Semiconductor Devises (Mfrs)
Mercy General Hospital	Sacramento	Hospitals
Mercy San Juan Medical Center	Carmichael	Hospitals
Municipal Services Agency	Sacramento	Government Offices – County
Sacramento Bee	Sacramento	Newspaper (publisher/Mfrs)
Sacramento Regional Transit	Sacramento	Bus Lines
Sacramento State	Sacramento	Schools-Universities & Colleges Academic
SMUD Customer Service Center	Sacramento	Electric Companies
Sutter Memorial Hospital	Sacramento	Hospitals
UC Davis Medical Center	Sacramento	Hospitals
Water Resource Department	Sacramento	State Government – Environmental Programs

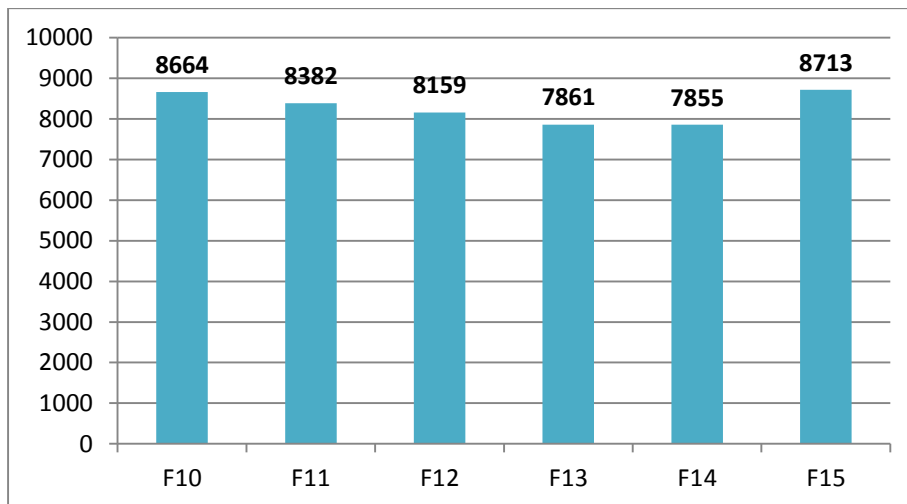
Internal Environmental Scan

Student: Headcount & Enrollment

Fall Term Headcount

The total Fall Term headcount of students at Folsom Lake College has shown some variability over the past 6 years. Enrollment slowly decreased from Fall 2010 to Fall 2014, with a five year low of 7,855. A significant increase in headcount was seen in Fall 2015 due to the expansion of the Rancho Cordova Center (RCC). It is anticipated that the headcount will continue to show a moderate increase once the new RCC site is completed and course offerings are further expanded.

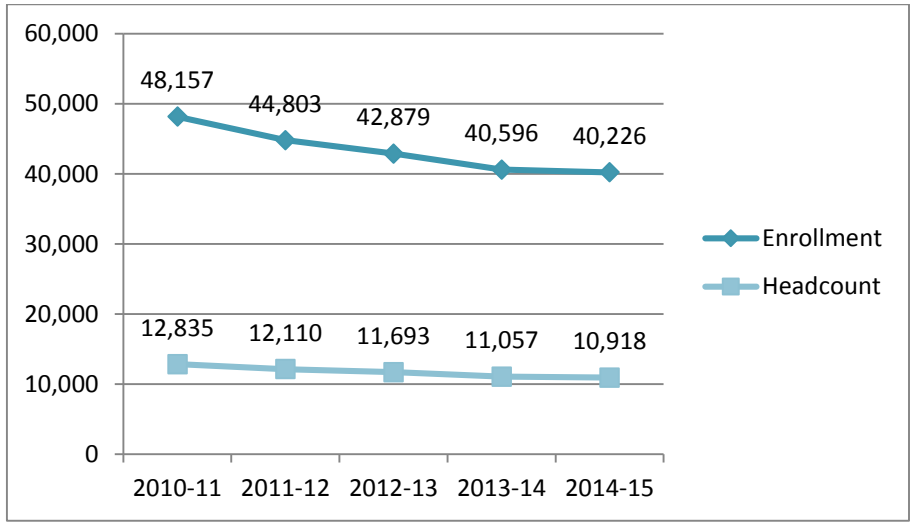
Chart 3: Fall Term Headcount



Annual Headcount & Enrollment

The annual headcount (total unduplicated number of students in fall & spring terms) and the annual number of enrollments (total number of courses in which students are enrolled) has shown a decline across the 5 year reporting period of 2010-2011 to 2014-15. The increase in the Fall 2015 term headcount suggests that the annual headcount will increase, along with course enrollments.

Chart 4: Annual Headcount & Enrollment

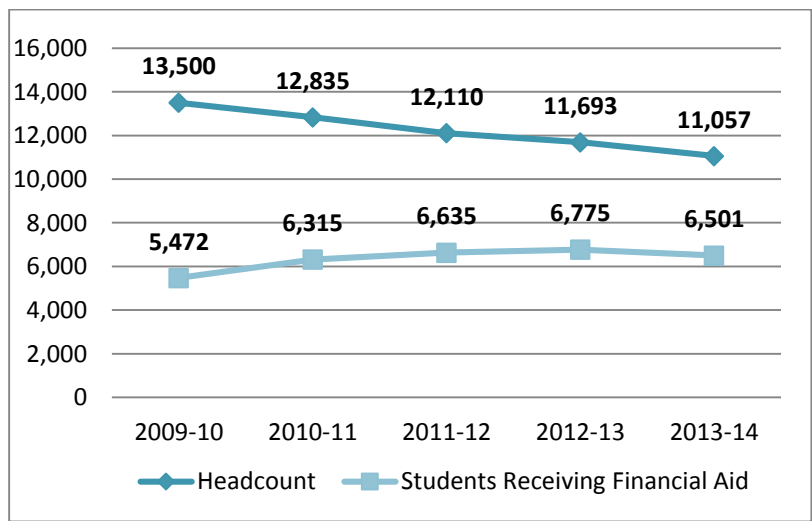


Student: Demographics

Socioeconomic Status Indicator

The socioeconomic status of FLC students is best captured by considering financial aid status. The percentage of students receiving financial aid has steadily increased from 40.5% in 2009-10 academic year, to 58.8% in 2013-14.

Chart 5: Number of Students Receiving Financial Aid



Ethnicity

The racial/ethnic background of FLC students has shifted slightly over the five year reporting period. There has been a significant increase in the population of students who identify as Hispanic/Latino, and a moderate increase in students who identify as Asian and Multi-Ethnic. When compared to ethnic profile of the communities served by FLC, the student body very closely mirrors those demographic features.

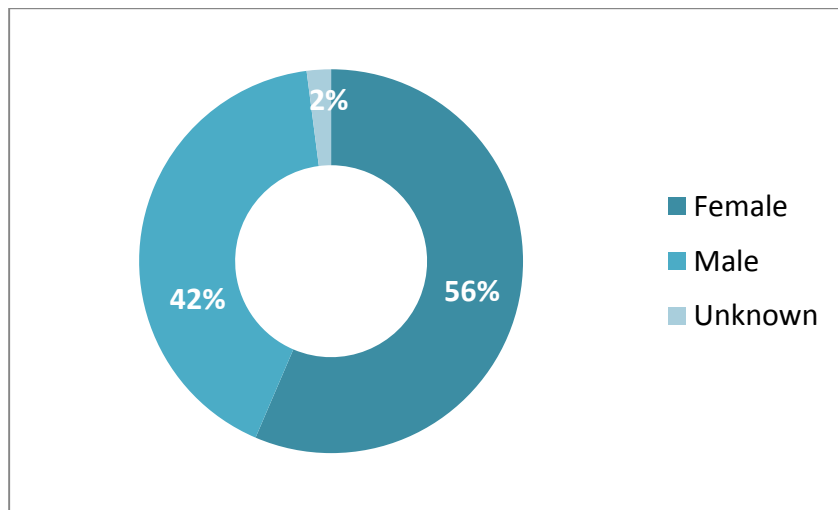
Table 10: Student Ethnicity Profile

	2010-11	2011-12	2012-13	2013-14	2014-15
African-American	2.1%	2.5%	2.7%	2.7%	2.8%
American Indian/Alaskan Native	0.8%	0.8%	0.9%	0.8%	1.0%
Asian	6.6%	6.6%	7.9%	8.9%	8.5%
Filipino	1.3%	1.3%	1.4%	1.6%	1.6%
Hispanic	12.6%	13.3%	14.5%	15.4%	16.8%
Multi-Ethnic	4.0%	4.2%	5.0%	4.7%	5.7%
Pacific Islander	0.6%	0.6%	0.7%	0.7%	0.6%
Unknown	13.6%	13.6%	4.1%	2.9%	2.3%
White Non-Hispanic	58.2%	57.0%	62.8%	62.3%	60.8%

Gender

In the 2009-2010 academic year, female students accounted for 59% of the student population and males 40%. That gender gap continues to narrow in 2014-15, with males currently accounting for 42% of the student population.

Chart 6: Student Gender Profile



Age

There has been a substantive shift in the age of students attending FLC. In the 2009-2010 academic year, 31% of students were 30 years of age or older; that percentage dropped to 25% in 2014-15. The decline in older students is likely impacted by course repeatability regulations enacted in 2013.

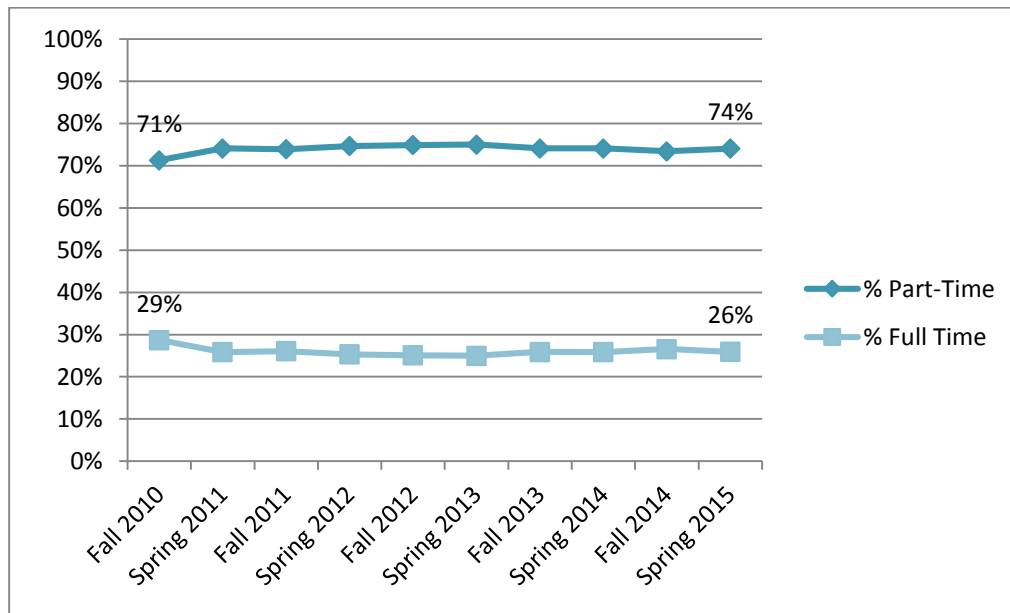
Table 11: Student Age Profile

	2010-11	2011-12	2012-13	2013-14	2014-15
19 or Less	26.6%	25.7%	25.7%	26.7%	27.9%
20 to 24	30.0%	31.6%	32.9%	33.2%	33.8%
25 to 29	12.2%	12.7%	12.4%	13.0%	13.2%
30 to 34	7.5%	7.6%	7.4%	7.1%	7.2%
35 to 39	5.7%	5.3%	5.0%	5.0%	4.4%
40 to 49	10.1%	10.0%	9.0%	7.9%	7.4%
50 +	7.8%	7.2%	7.5%	7.0%	6.0%

Full-time/Part-time (Unit Load)

The percentage of students taking a full-time unit load has decreased moderately from 2010 to present; 29% to 26%. There is been a moderate increase in the average number of units taken a semester from 7.08 units in the Fall of 2010 to 7.40 units in the Spring of 2015.

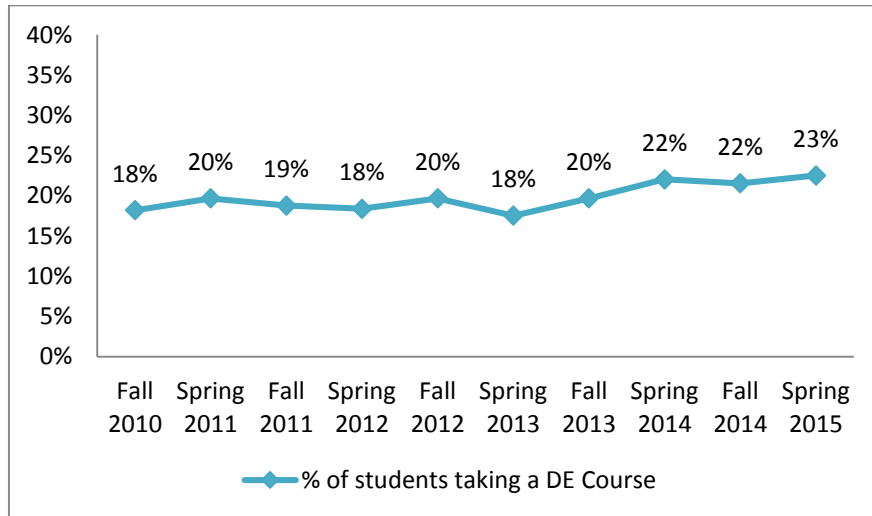
Chart 7: Full-Time/Part-Time Student Profile



Distance Education

There are a growing number of students enrolling in taking Distance Education (DE) courses. In the Fall of 2010, 18% of students were enrolled in a DE course; that number increased to 23% by the Spring of 2015. There has been a corresponding increase in the percentage of enrollments in DE courses (12% vs. 14%).

Chart 8: Distance Education Student Profile

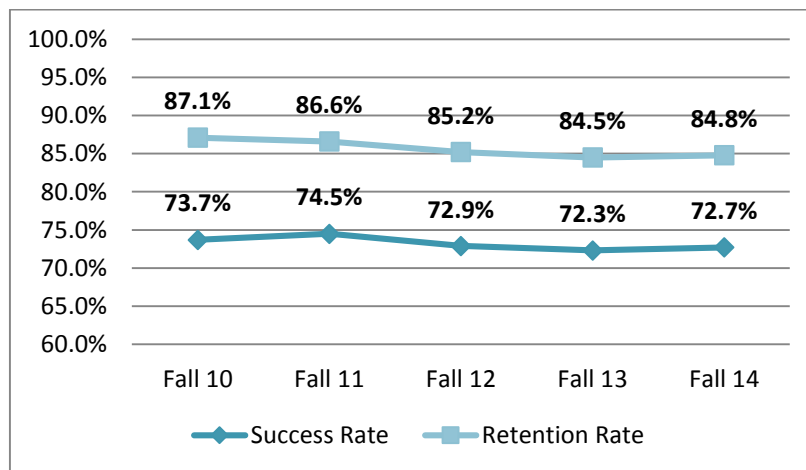


Student: Performance

Retention & Success Rates

Over the past 5 years there has been a moderate but steady decline in the college-wide retention rate, moving from 87.1% to 84.8%. The success rate has remained relatively stable at an average of 73%.

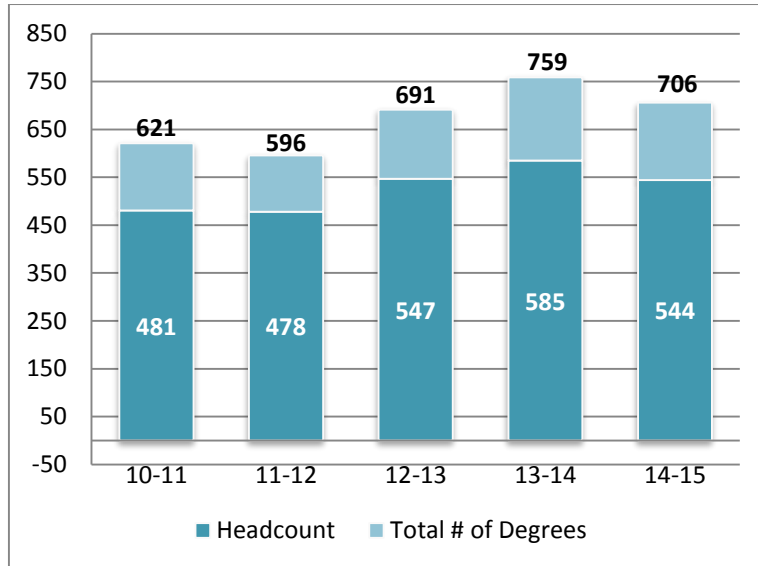
Chart 9: Retention & Success Rates



Program Awards

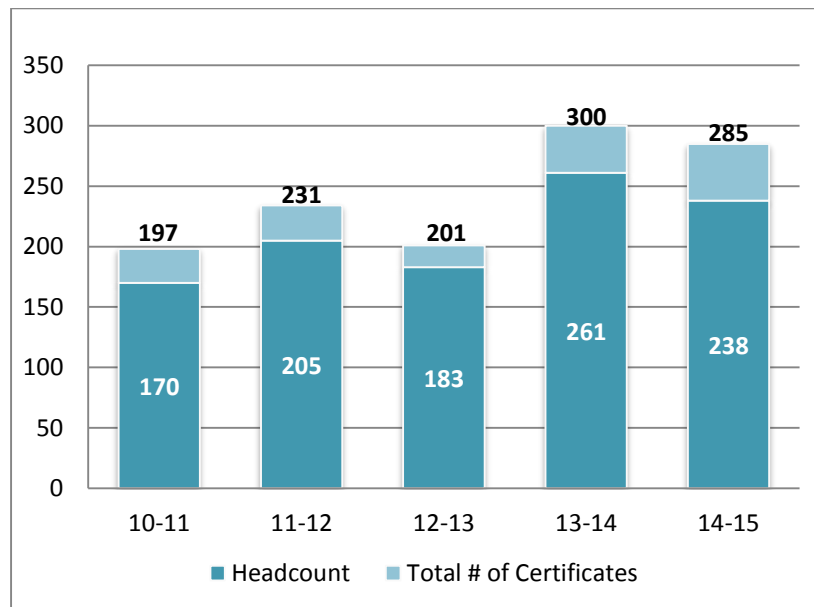
The college has awarded a total of 3,373 Associate Degrees across the 5 year reporting period. There has been some variations in the number awards from year to year, with a significant jump in 2013-14 and then a regression towards the mean in 2014-15.

Chart 10: Degrees Awarded



The college has awarded a total of 1,214 certificates across the 5 year reporting. Similar to the data on degrees, there was significant variance in certificates awarded from year to year.

Chart 11: Certificates Awarded



Transfers

The total number of FLC students that transfer to a 4-year university has increased over the 5 year reporting period, from 331 to 477, with a 5 year average of 411 transfers per year. The majority of transfers (80%) are to the California State University (CSU) system schools. The top CSU transfer schools in 2013-2014 were Sacramento (290), Chico (26), and San Jose (11). Eighteen percent of transfers are to the University of California (UC) system schools. The top UC transfer schools in 2013-2014 were Davis (51), Santa Barbara (8), Berkeley (7), Los Angeles (7), and San Diego (7). Transfers to private 4 year schools, both in-state and out of state, has steadily declined to 12% down to 1%.

Chart 12: Number of Transfer

