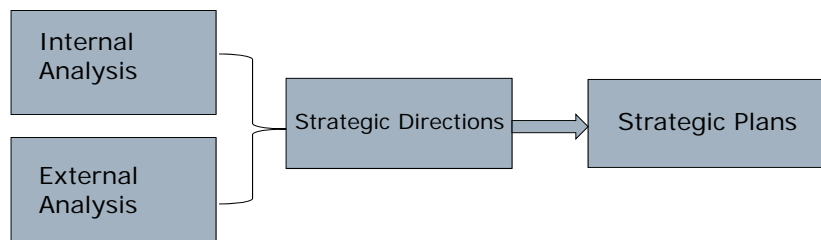


FCC Environmental Scan - 2012

Institutional Research

The Role of Environmental Scan in Strategic Planning

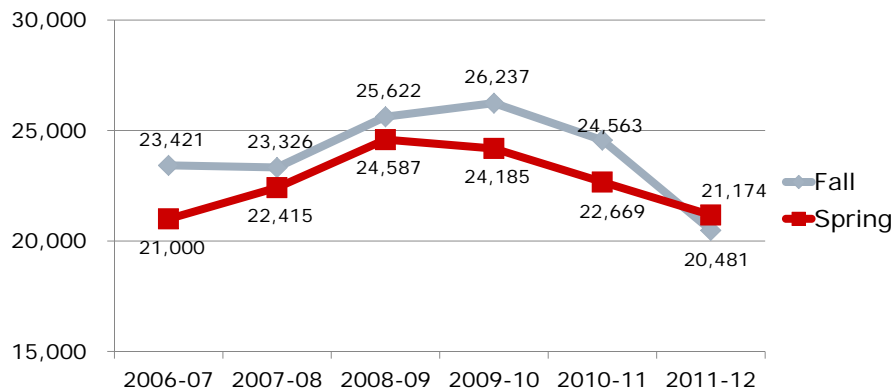


Reference:
Morrison, J. L. (1992). Environmental scanning. In M. A. Whitely, J. D. Porter, and R. H. Fenske (Eds.), *A primer for new institutional researchers* (pp. 86-99). Tallahassee, Florida: The Association for Institutional Research.

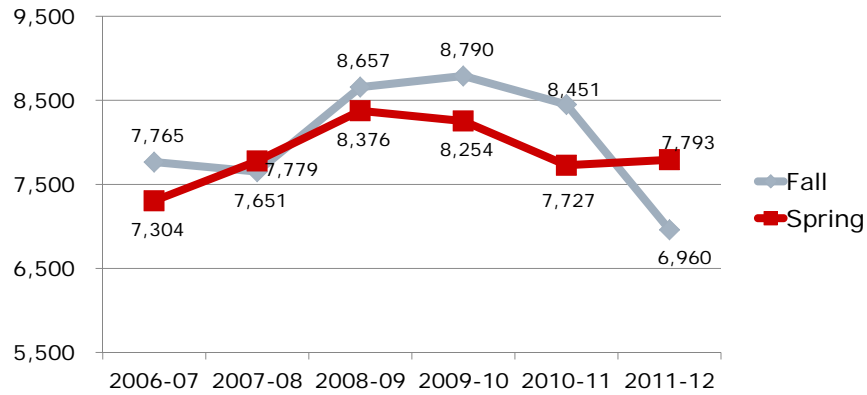
Internal Scan

- ❑ Enrollment/FTES
- ❑ Demographic Trend
- ❑ Student Success
 - ❑ GPA/Retention/Success
 - ❑ Persistence – Fall08 new student cohort
 - ❑ Degree/Certificate/Graduation Rate
 - ❑ Transfer
- ❑ FCC Employees and Budget

FCC Headcount - Unduplicated



FCC FTES (Full-time Equivalent Students)



Demographic Trend – 6 Years

ETHNICITY	Fall 2006	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011
Headcount	23,421	23,326	25,622	26,737	24,563	20,481
African American/non-Hispanic	8%	8%	8%	8%	8%	8%
American Indian/Alaskan Native	1%	1%	1%	1%	1%	1%
Asian/ Pacific Islander	15%	15%	15%	16%	17%	18%
Hispanic	35%	36%	38%	39%	42%	45%
White/non-Hispanic	29%	28%	26%	26%	25%	24%
Unknown	12%	12%	12%	11%	6%	4%

Demographic Trend – 6 Years

GENDER	Fall 2006	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011
Headcount	23,421	23,326	25,622	26,737	24,563	20,481
Female	52%	51%	51%	51%	51%	53%
Male	48%	48%	47%	49%	48%	46%
Unknown	0%	0%	1%	0%	1%	1%

STUDENT LOAD	Fall 2006	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011
Full-Time	36%	36%	38%	38%	39%	39%
Part-Time	64%	64%	62%	62%	61%	61%

Demographic Trend – 6 Years

AGE	Fall 2006	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011
Headcount	23,421	23,326	25,622	26,737	24,563	20,481
19 or Less	26%	26%	25%	27%	26%	25%
20-24	34%	33%	33%	32%	35%	38%
25-29	14%	14%	15%	15%	14%	14%
30-34	8%	8%	8%	8%	8%	8%
35-39	6%	6%	6%	6%	5%	5%
40-49	9%	9%	8%	8%	7%	7%
50+	5%	5%	5%	5%	4%	4%

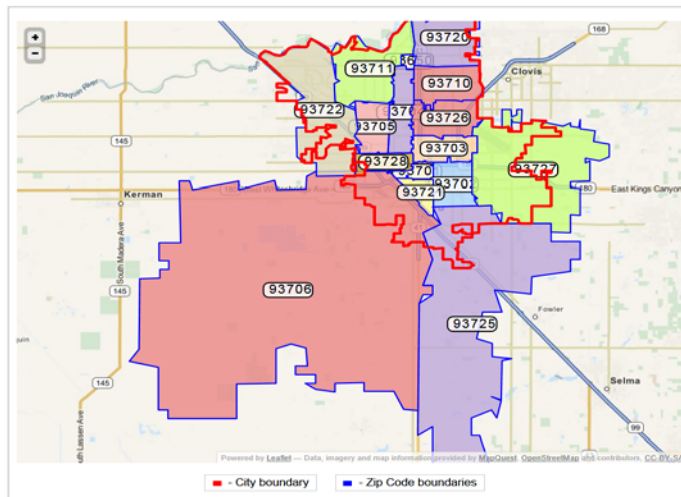
Demographic Trend – 6 Years

GENDER	Fall 2006	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011
Headcount	23,421	23,326	25,622	26,737	24,563	20,481
First Generation	38%	38%	39%	39%	41%	43%
Low Income	54%	52%	57%	59%	64%	72%

Note1: First generation data are self-reported.

Note2: Low income students are defined as receiving the BOG waiver.

Fresno Zip Codes



FCC Top 10 Zip Codes –Fall 2011

TOP 10 Zip Codes - FCC Fall 2011		
ZIP Codes	Count	% of Total Enrollment
93722 (Fresno-NW/New Fig)	2,025	10%
93727 (Fresno-Sunnyside)	1,708	8%
93726 (Fresno-NE/S of Shaw)	1,168	6%
93702 (Fresno-SE)	1,044	5%
93705 (Fresno-NW/S of Shaw)	979	5%
93703 (Fresno –SE/Mayfair)	863	4%
93706 (Fresno-SW/Edison)	860	4%
93611 (Clovis)	722	4%
93710 (Fresno-NW/Hoover)	718	4%
93704 (Fresno-Old Fig/Bullard)	714	3%
TOTAL ENROLLMENT TOP 10 ZIP	10,801	53%
TOTAL ENROLLMENT FCC	20,481	

Top 10 Zip Codes for Willow International –Fall 2011

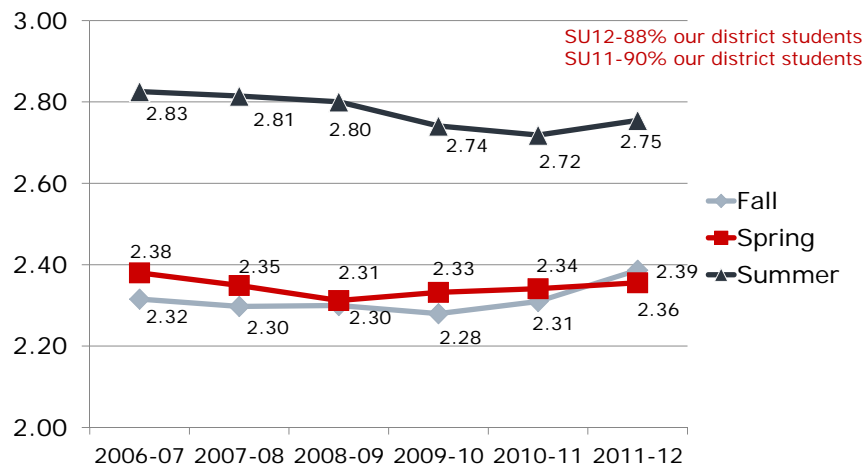
ZIP Codes	Count	% of Total Enrollment
93720 (Fresno-NE/N of Herndon)	779	14%
93611 (Clovis)*	747	13%
93619 (Clovis)	490	9%
93612 (Clovis)	379	7%
93727 (Fresno-Sunnyside)*	262	5%
93722 (Fresno – NW/New Fig)*	245	4%
93711 (Fresno-NW/Van Ness ext/Bluffs)	229	4%
93710 (Fresno-NE/Hoover)*	227	4%
93730 (Fresno-NE/WW Lake/Copper Rvr)	162	3%
93726 (Fresno-NE/S of Shaw)	138	2%
TOTAL ENROLLMENT TOP 10 ZIP	3,658	66%
TOTAL ENROLLMENT WI	5,562	

* FCC top 10 zip code

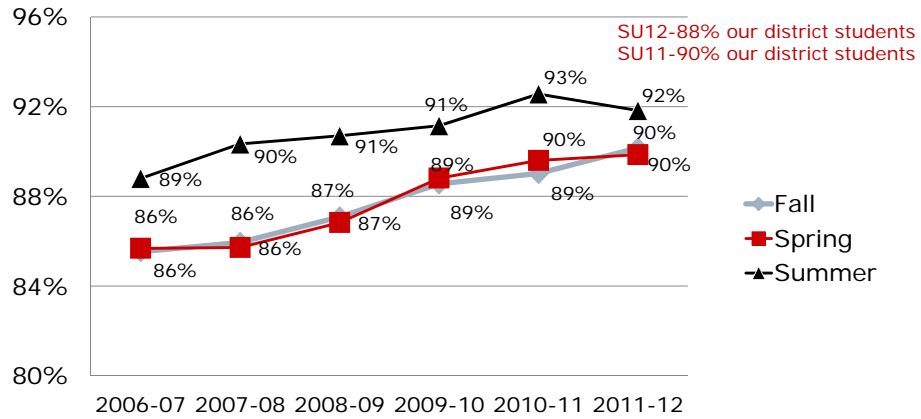
Fall 2011 – Concurrent Enrollment

Campus/Center	#	% of FCC Total
FCC Students –Fall11	20,481	
Concurrently enrolled at WI	1,298	6.3%
Concurrently enrolled at RC	546	2.7%
Concurrently enrolled at MC	405	2.0%
Concurrently enrolled at OC	86	0.4%
Total concurrently enrolled at FCC & other campuses or centers	2,110 (unduplicated)	10.3%

Term GPA

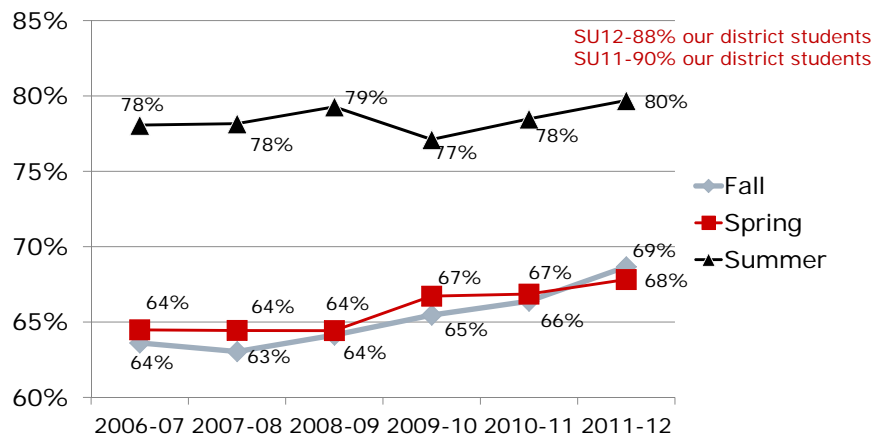


Term Retention Rate



Note: Retention rate is calculated based on students who earn any grade other than W over the total enrolled at census.

Success Rate

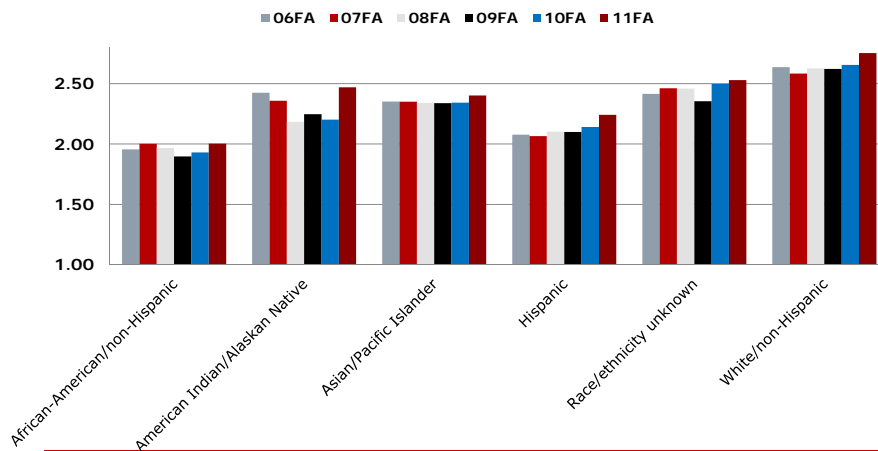


Note: Success is calculated based on the students who earned a grade of A, B, C, or Pass over the total students enrolled at census.

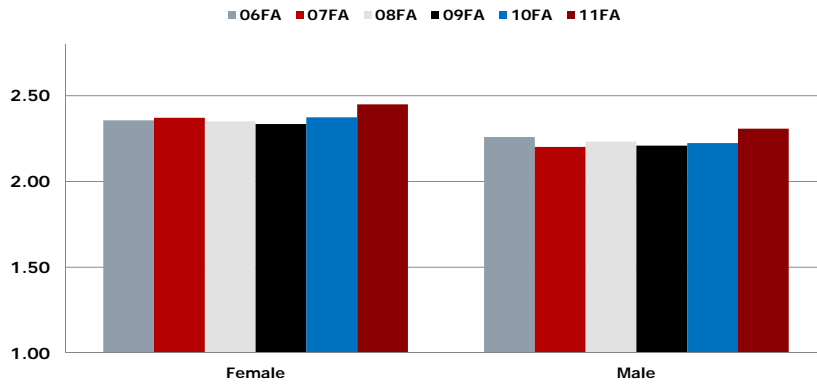
Fall Term GPA by Ethnicity

Fall Terms	06FA	07FA	08FA	09FA	10FA	11FA
African-American/non-Hispanic	1.95	2.00	1.97	1.90	1.93	2.00
American Indian/Alaskan Native	2.42	2.36	2.18	2.25	2.20	2.47
Asian/Pacific Islander	2.35	2.35	2.34	2.34	2.34	2.40
Hispanic	2.08	2.06	2.10	2.10	2.14	2.24
Race/ethnicity unknown	2.42	2.46	2.46	2.35	2.50	2.53
White/non-Hispanic	2.64	2.58	2.63	2.62	2.66	2.75
Total	2.31	2.30	2.30	2.28	2.31	2.39

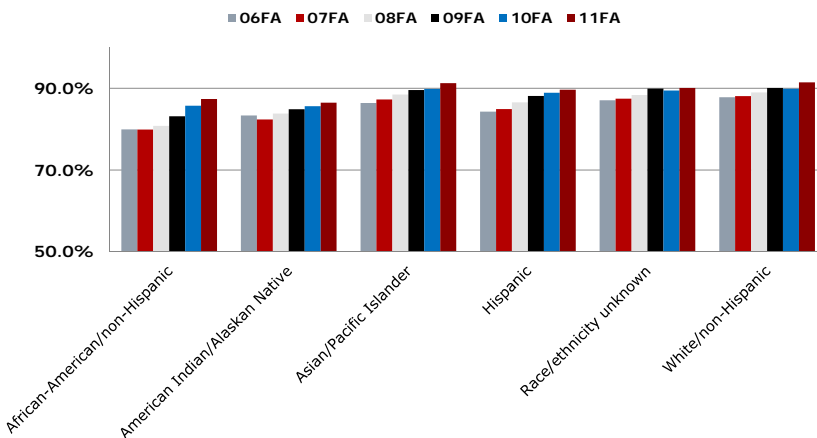
Fall Term GPA by Ethnicity



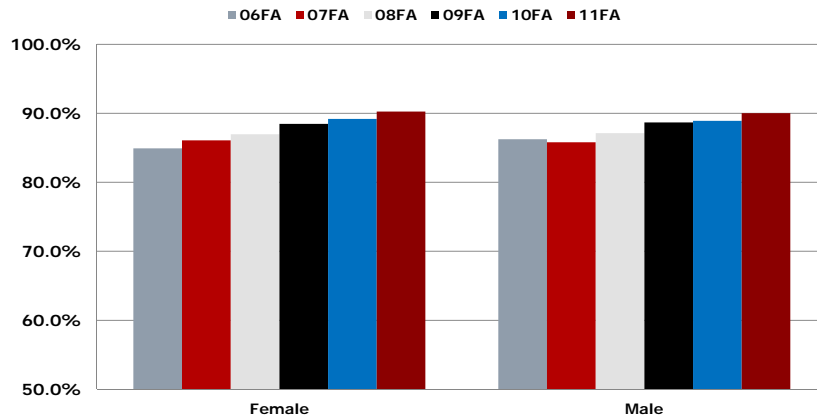
Fall Term GPA by Gender



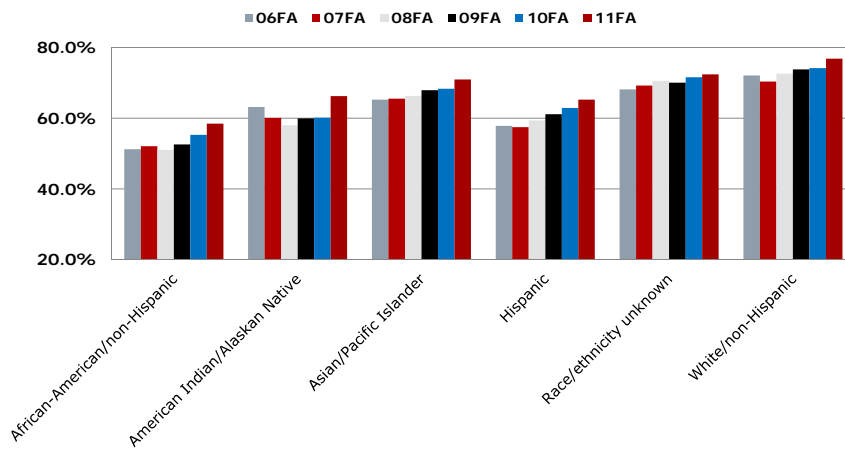
Fall Retention Rate by Ethnicity



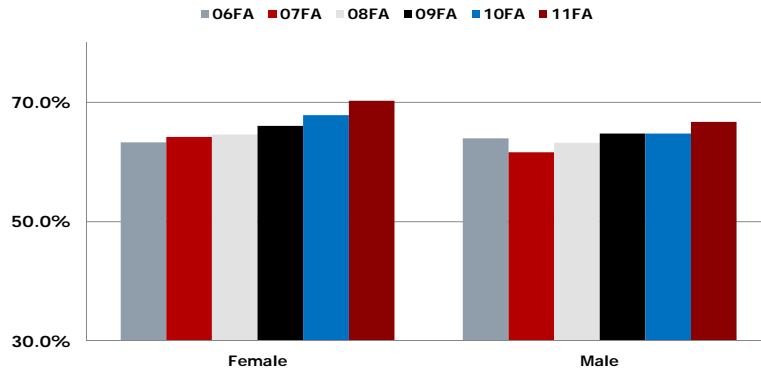
Fall Retention Rate by Gender



Fall Success Rate by Ethnicity



Fall Success Rate by Gender

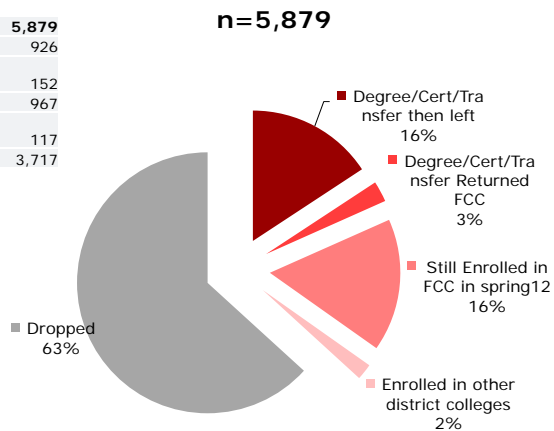


FCC Distance Education

FCC - DE	Sections	Enrollment	Success	Retention	GPA
Fall 2006	65	1,559	53.4%	75.8%	2.29
Fall 2007	65	1,655	58.4%	81.9%	2.33
Fall 2008	92	2,438	58.8%	79.1%	2.36
Fall 2009	93	2,476	57.8%	81.5%	2.36
Fall 2010	85	2,226	61.4%	83.4%	2.38
Fall 2011	77	1,848	63.4%	85.0%	2.43

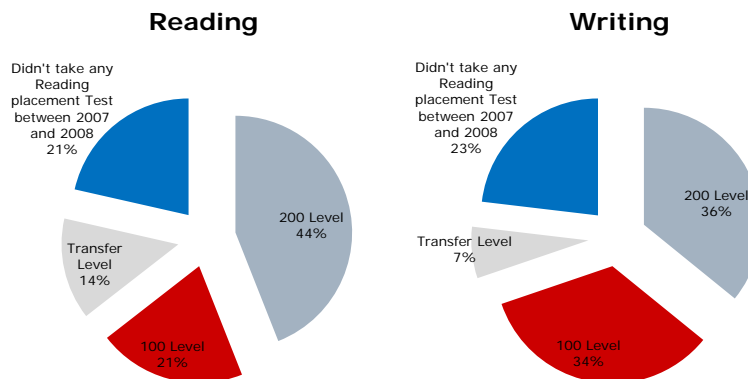
Fall 2008 New Student Cohort- Track 4 years to spring 2012

Fall2008 Cohort	5,879
Degree/Cert/Transfer then left	926
Degree/Cert/Transfer Returned FCC	152
Still Enrolled in FCC in spring12	967
Enrolled in other SCCC colleges/centers	117
Dropped	3,717



Fall 2008 Cohort Placement Levels- English/ESL Reading & Writing

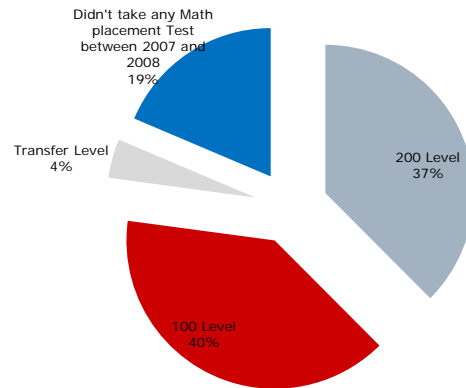
n=5,879



Note: Include placement levels from 2007 and 2008 including placed by tests and multiple measures.

Fall 2008 Cohort Placement Levels-Math

n=5,879

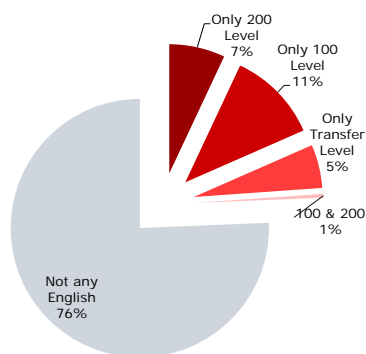


Note: Include placement levels from 2007 and 2008 including placed by tests and multiple measures.

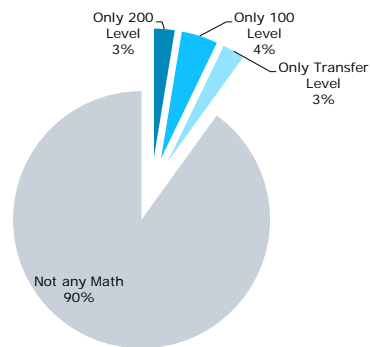
Fall 2008 Cohort – English/Math completed during 1st term

n=5,879

English/ESL

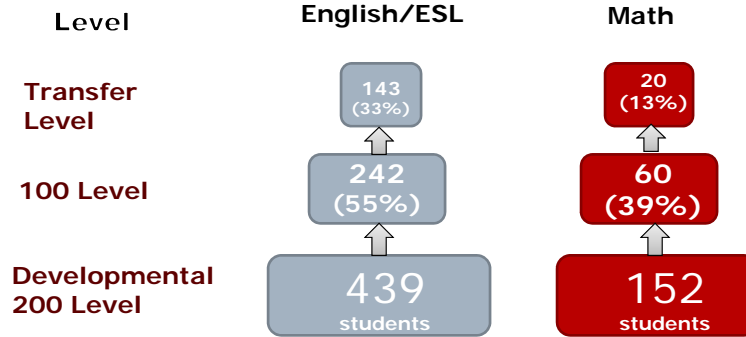


Math



Fall 08 Cohort English/ESL & Math Progression within 4 years

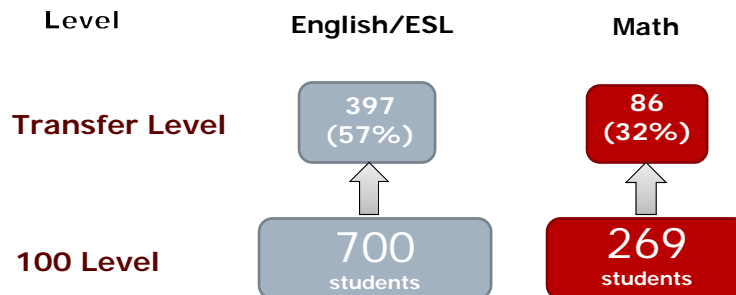
n=5,879



Note: Only include students who successfully completed each level of English/ESL/math.

Fall 08 Cohort English/ESL & Math Progression within 4 years

n=5,879



Note: Only include students who successfully completed each level of English/ESL/math.

Fall 2008 New Student Cohort- Track 4 years to spring 2012

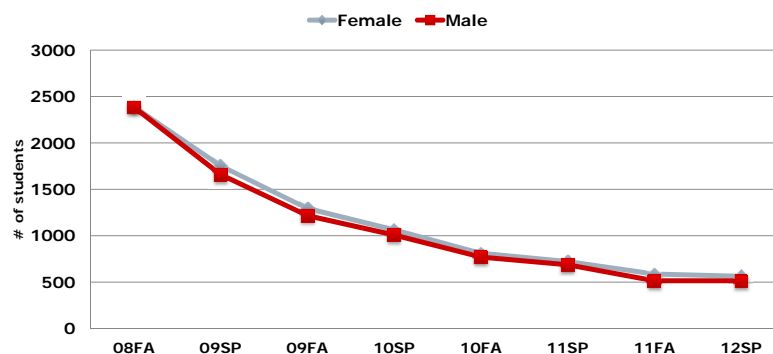
n=5,879

- 241 AA/AS degrees awarded
- Average 7 terms to get a degree
- 260 certificates awarded
- 773 students transferred to 4-year
 - AY2008-09 - 72
 - AY2009-10 - 119
 - AY2010-11 - 264
 - AY2011-12 - 318

Fall08 Student Attrition by Gender

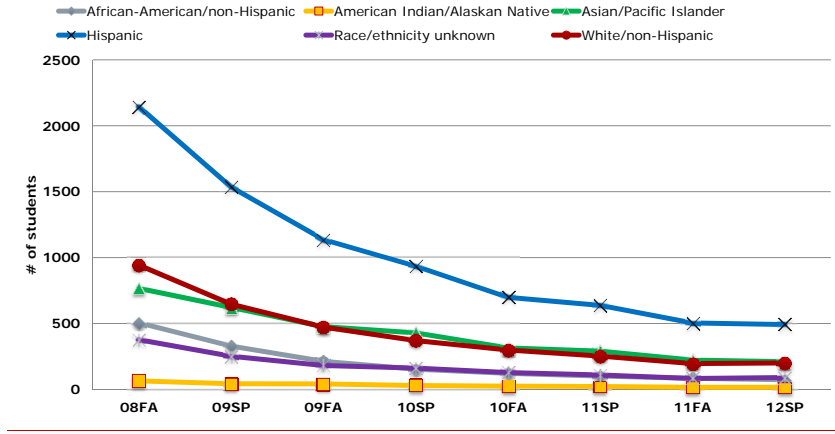
(Exclude students who received degree/cert or transferred)

n=4,801



Fall 08 Student Attrition by Ethnicity (Exclude students who received degree/cert or transferred)

n=4,801



Fresno City College

Fall08 Student Attrition by Ethnicity (Exclude students who received degree/cert or transferred)

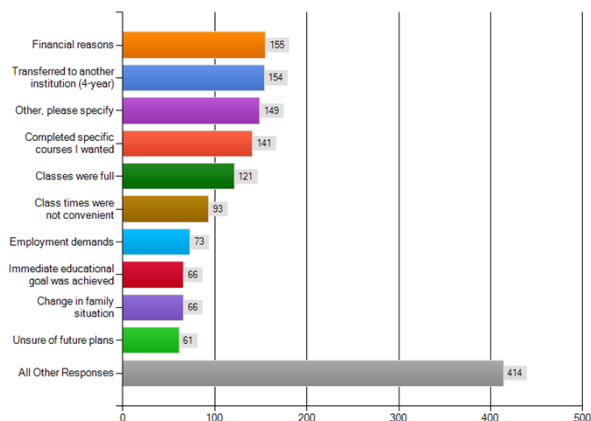
n=4,801

Ethnicity	08FA	09SP	09FA	10SP	10FA	11SP	11FA	12SP
African-American/non-Hispanic	505	328	213	154	122	102	85	74
American Indian/Alaskan Native	65	43	42	30	25	22	16	16
Asian/Pacific Islander	767	622	476	429	315	291	223	211
Hispanic	2,144	1,535	1,137	935	699	638	504	492
Race/ethnicity unknown	377	252	182	162	128	110	83	90
White/non-Hispanic	943	647	473	371	299	253	196	201
TOTAL	4,801	3,427	2,523	2,081	1,588	1,416	1,107	1,084

Fresno City College

Why students left us? (Non-returning student survey, n=705)

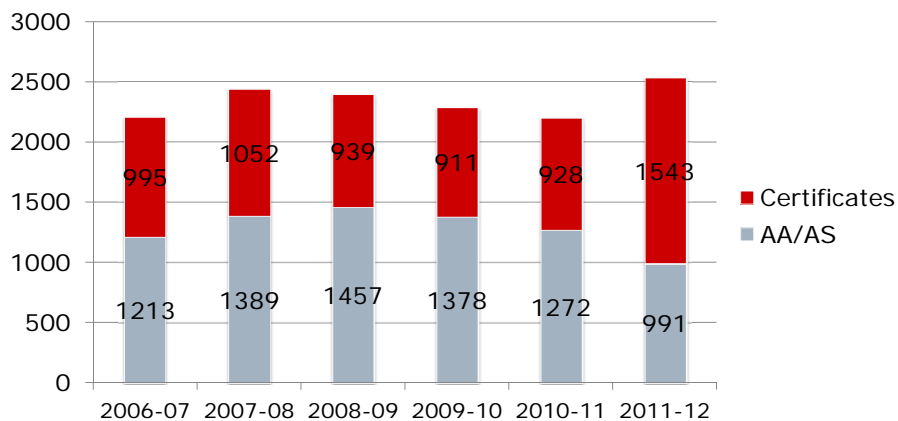
Please indicate why you did not re-enroll at FCC this fall. (select up to top 5)



Fresno City College

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Degree and Certificates Awarded

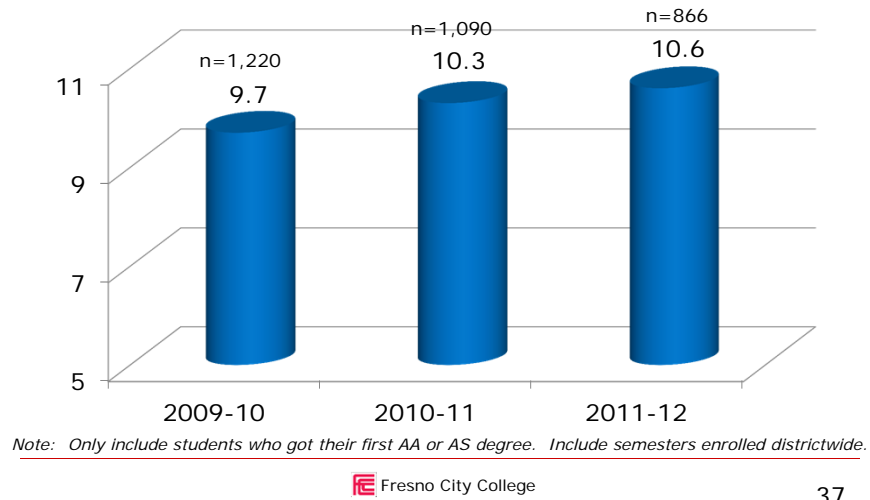


Note: Includes all certificates in DataTel.

Fresno City College

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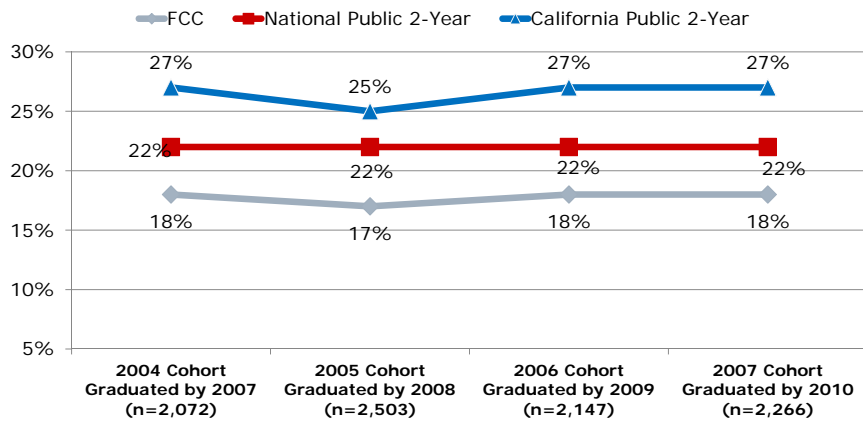
Time to Degree - semesters



37

Graduation Rate

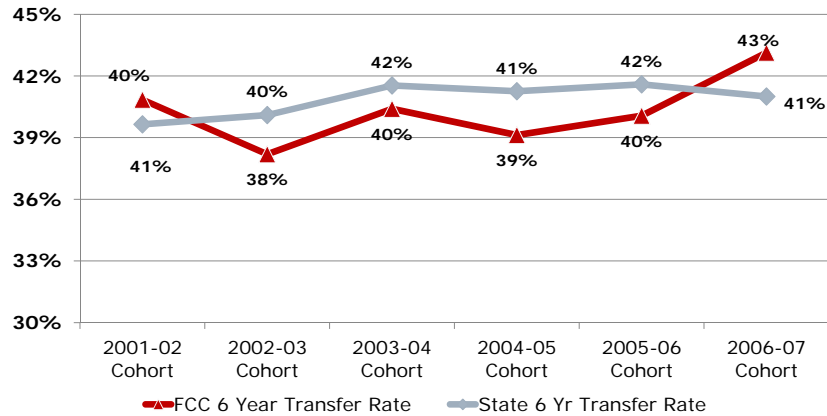
Graduation Rate of first-time, full-time, degree-seeking students who graduated within 150% of normal time (3 yrs for AA/AS, 1.5 yrs for certificates)



Fresno City College

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FCC 6 Year Transfer Rate



Source: CCCCO DataMart.

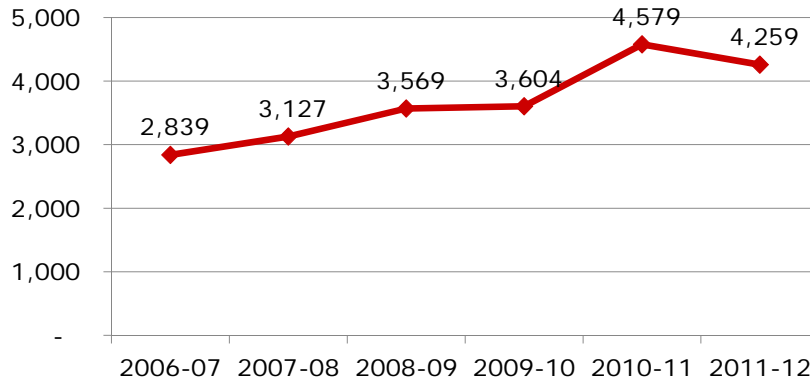
FCC 6 Year Transfer Rate

6 Year Transfer Rate	2001-02 Cohort n=2,091	2002-03 Cohort n=1,930	2003-04 Cohort n=1,666	2004-05 Cohort n=1,705	2005-06 Cohort n=1,485	2006-07 Cohort n=1,827
FCC Overall	41%	38%	40%	39%	40%	43%
State	40%	40%	42%	41%	42%	41%
Transfer Rate by Gender						
Female	41%	39%	40%	39%	42%	44%
Male	41%	37%	41%	39%	37%	42%
Transfer Rate by Ethnicity						
African-American	38%	28%	59%	45%	37%	41%
Asian/Pacific Islander	46%	44%	43%	47%	53%	55%
Hispanic	32%	36%	32%	32%	33%	38%
Race/ethnicity unknown	49%	35%	42%	40%	41%	41%
White Non-Hispanic	45%	41%	45%	44%	46%	45%

Source: CCCCO DataMart.

Note: Sample size for American Indian/Alaskan Native was too small to include.

Transfers Volume -6 years – Actual transfers to all 4 year institutions



Note: Data are from National Student Clearinghouse as of August 2012.

Top Transfer Destinations for FCC Students – 6 Years

Transfer Destinations	#
CSU, Fresno	10,681
University of Phoenix	2,260
Fresno Pacific University	1,464
National University	440
DeVry University - Fremont	411
UC, Davis	304
ITT Technical Institute	297
Ashford University	294
CSU, Sacramento	233
CSU, San Francisco	210
Other UC campuses	751
Other CSU campuses	1,530
Other private or out of state institutions	3,102
Total	21,977

Note: Data are from National Student Clearinghouse as of August 2012.

FCC Employees by Classification -2012

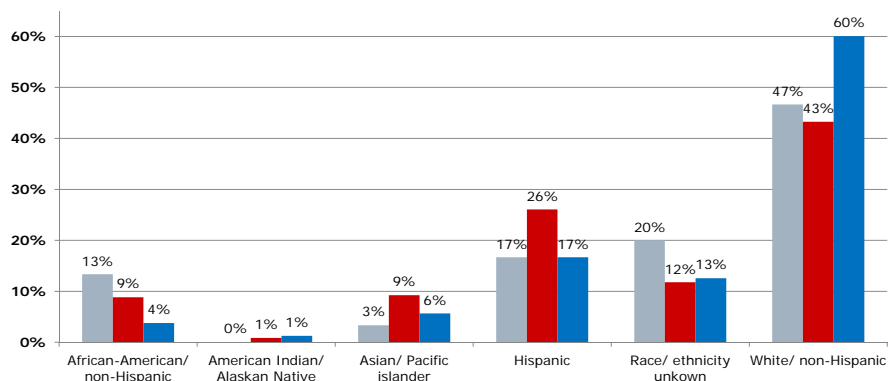
Classification	Employment Type		TOTAL
	Full-Time	Part-Time	
Administrator	22	0	22
Classified	238	52	290
Classified Manager	8	0	8
Confidential	2	0	2
Faculty	318	941	1,259
Total	588	993	1,581

Note: Data are as of 10/9/2012 from DataTel.

FCC Employee Classification by Ethnicity

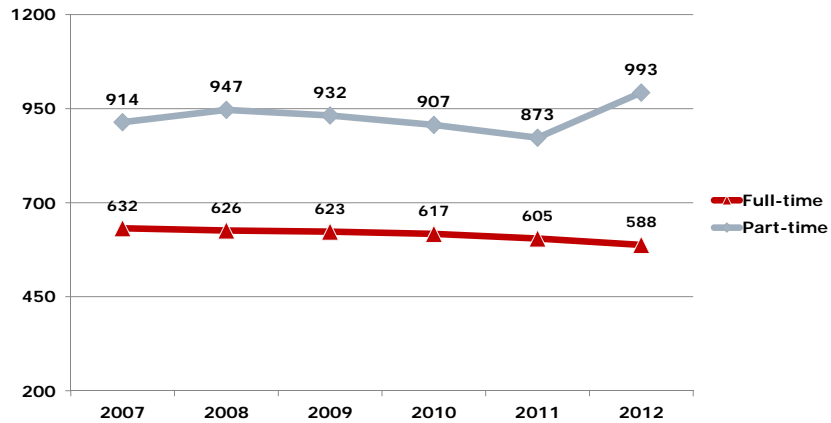
Full-time only (n=586*)

■ Administration ■ Classified ■ Faculty



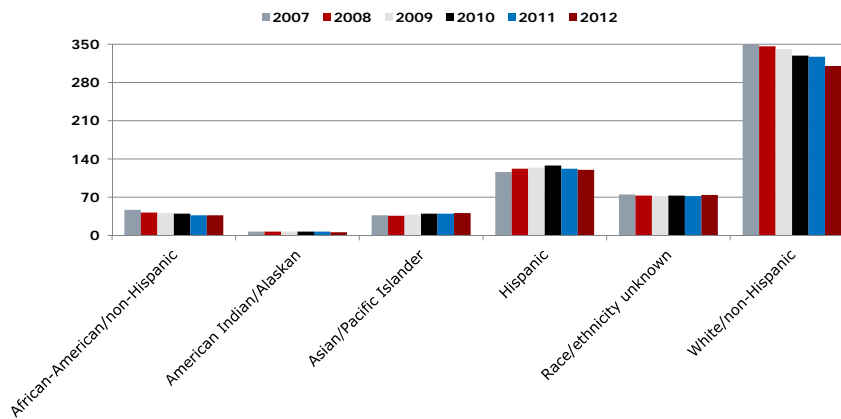
*Note: Administration includes classified managers. *Total number of full-time employees don't include 2 confidential employees.*

FCC Employees – 6 year trend Full-time & Part-time

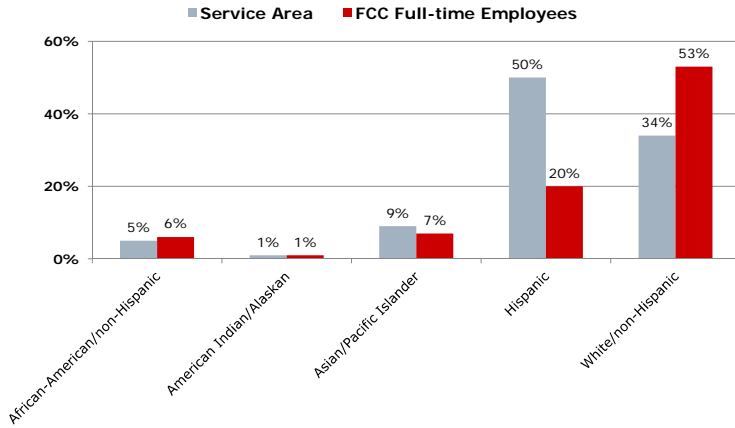


FCC Employees - Ethnicity

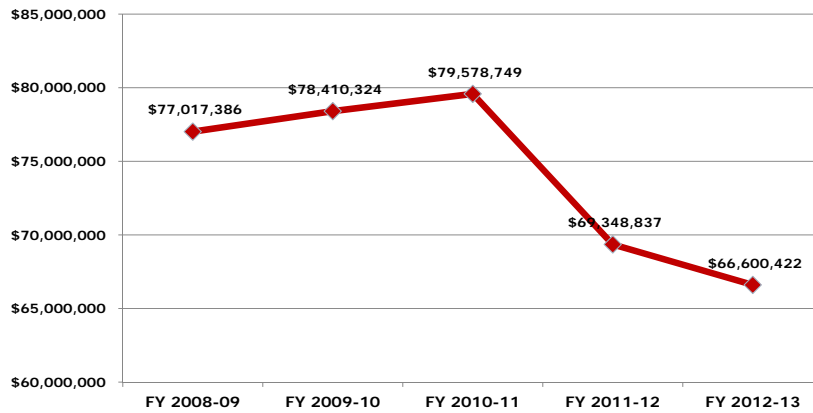
Full-time



Service Area vs. FCC Full-time Employees



FCC 5 Year Budget – general fund



Source: FCC Business Office, budget data are after all adjustments made including carry over.

FCC 5 Year Budget -general fund

Categories	FY2008-2009	FY2009-2010	FY2010-2011	FY2011-2012	FY2012-2013	% Change
Academic Salaries	40,946,590	40,560,461	41,298,410	39,864,300	40,179,907	-2%
Classified Salaries	12,841,808	12,818,563	12,624,269	11,512,433	11,934,164	-7%
Employee Benefits	14,851,347	14,382,385	15,251,399	14,885,971	14,745,186	-1%
Supplies & Materials	1,162,347	1,124,314	1,041,241	290,991	795,702	-32%
Other Oper Exp & Service	3,142,047	2,657,211	2,422,081	1,947,802	1,712,489	-45%
Capital Outlay	184,860	1,470,397	1,339,557	388,318	270,564	46%
Other Outgo	3,888,387	5,396,993	5,601,792	459,022	-3,037,590	-178%
Total	77,017,386	78,410,324	79,578,749	69,348,837	66,600,422	-14%

Source: FCC Business Office, budget data are after all adjustments made including carry over.

External Scan

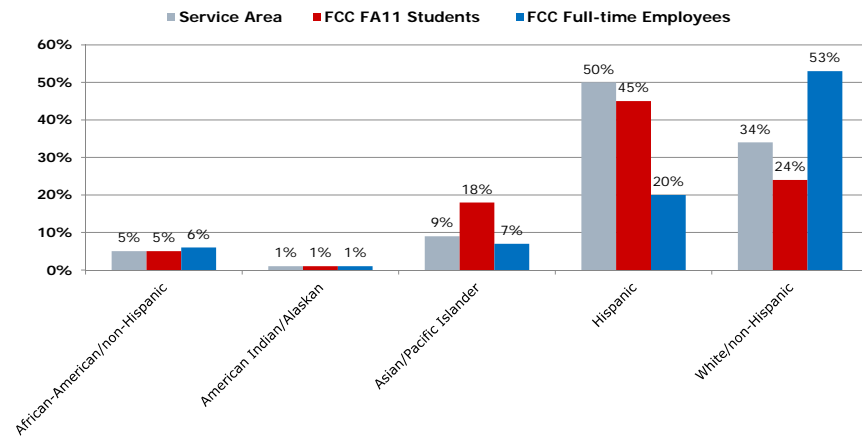
- Area Demographics
- K-12 Enrollment and High School Graduates
- Employment Data
- Labor Market Projections
- Recent legislation changes

Service Area vs. Students

Ethnicity	SCCCD Service Area		SCCCD Students - Fall 2011			
	Service Area - Census 2010		FCC	RC	WI	MC/OC
Hispanic	516,200	50%	45%	64%	31%	53%
White	348,179	34%	24%	22%	48%	30%
African American	48,902	5%	8%	3%	4%	3%
Asian	94,066	9%	18%	5%	11%	7%
Native American	12,102	1%	1%	1%	2%	2%
Others	8,793	1%	4%	5%	5%	6%
Total	1,028,242	100%	100%	100%	100%	100%

Source: SCCC Redistricting Report & IR Aterm data

SCCCD Service Area vs. FCC FA11 Students & FCC Full-time Employees



Population Growth

California, SCCC Service Area, Service Area Counties - 2000, 2010, and 2020 Projected					
	2000	2010	Change from 2000 to 2010	2020 Projected	Change Projected from 2010
CA Population	33,873,086	37,253,956	10%	44,135,923	18%
SCCCD Service Area Population	871,000 (est)	1,028,245	18%	Not available	Not available
Fresno County	799,407	930,450	16%	1,201,792	29%
Madera County	123,109	150,865	23%	212,874	41%
Tulare County	368,021	442,179	20%	599,117	35%
Kings County	129,461	152,982	18%	205,707	34%

Source: College Brain Trust, "Lessons Learned", California Department of Finance, U.S. Census

Ethnicity Distribution Change -Fresno County 2000 to 2010

Ethnicity	2000	2010	% Change
Total Population	799,407	930,450	16.4%
Hispanic	351,636	468,070	33.1%
White	317,522	304,522	-4.1%
African American	40,291	45,005	11.7%
Asian/Pacific Islander	63,711	87,922	38.0%
American Indian and Alaska Native	6,223	5,979	-3.9%
Other	20,024	18,952	-5.4%

Source: US Census Bureau

Educational Attainment

(Include service area portions only)

Educational Attainment - 25 Years and Over	California	Fresno County
Population 25 years and over	24,097,200	498,931
Less than 9th grade	10.5%	14.6%
9th to 12th grade, no diploma	8.0%	10.5%
High school graduate (Included equivalency)	20.8%	23.4%
Some college, no degree	22.2%	23.0%
Associate's degree	7.6%	7.8%
Bachelor's degree	19.1%	14.0%
Graduate or professional degree	11.0%	6.6%
Percent high school graduate or higher	80.7%	74.8%
Percent bachelor's degree or higher	30.1%	20.6%

Source: US Census Bureau

Household Income & Poverty Level

(Include service area portions only)

Household Income					
	California	Fresno County	Madera County	Tulare County	Kings County
Less than \$25k	21.6%	27.0%	23.2%	28.8%	Not available
\$25 to \$74k	39.8%	42.8%	48.8%	49.3%	Not available
\$75 to \$200k or more	38.6%	30.2%	28.0%	21.9%	Not available
Median household income	\$60,883	\$52,016	\$48,940	\$40,965	\$49,868

Percentage of Persons below Poverty Level						
	US	California	Fresno County	Madera County	Tulare County	Kings County
Persons below poverty level, percent, 2006-2010	13.8%	15.8%	16.9%	14.3%	23.9%	11.6%

Source: US Census Bureau 2010 American Community Survey.

High School Graduates

	2009-10 Actual	2010- 2011 Projected	2011- 2012 Projected	2012- 2013 Projected	2013- 2014 Projected	2014- 2015 Projected	2015- 2016 Projected	2016- 2017 Projected	% Change 2009-10 to 2016-17
California	404,899	400,822	399,050	395,271	385,311	383,199	381,171	380,165	-6.1%
Fresno	11,149	11,335	11,366	11,229	11,010	10,948	11,228	11,342	1.7%
Madera	1,618	1,688	1,658	1,678	1,645	1,679	1,691	1,684	4.1%
Tulare	5,380	5,226	5,281	5,248	5,269	5,296	5,327	5,327	-1.0%
Kings	1,520	1,695	1,665	1,693	1,712	1,724	1,739	1,738	14.3%

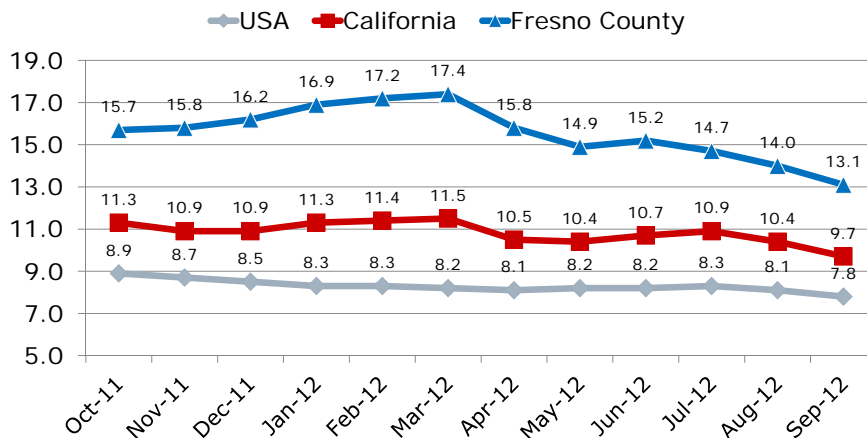
Source: California Department of Finance

Projected K-12 Enrollment

	2010-11 Actual	2011-12 Projected	2012-13 Projected	2013-14 Projected	2014-15 Projected	2015-16 Projected	2016-17 Projected
CALIFORNIA	6,210,692	6,217,883	6,240,414	6,251,009	6,252,179	6,243,134	6,248,036
FRESNO	193,732	195,980	198,759	201,318	203,632	206,192	208,519
KINGS	28,942	29,328	29,902	30,396	30,802	31,056	31,384
MADERA	29,993	30,525	31,079	31,534	31,871	32,241	32,621
TULARE	97,715	99,115	100,625	102,262	103,668	104,814	106,067

Source: California Department of Finance

Unemployment Rate – 12 months



Source: US Department of Labor, Bureau of Labor Statistics.

2008-2018 Occupations with Most Job Openings- Fresno County

Occupational Title	Total Job Openings [1]	2010-1st Quarter Wages		Education and Training Levels [4]
		Median Hourly [2]	Median Annual [2]	
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	9,470	\$8.87	\$18,463	11
Cashiers	3,840	\$9.20	\$19,145	11
Retail Salespersons	3,710	\$9.73	\$20,230	11
Personal and Home Care Aides	3,230	\$9.73	\$20,244	11
Waiters and Waitresses	2,570	\$9.19	\$19,124	11
Combined Food Preparation and Serving Workers, Including Fast Food	2,400	\$9.13	\$19,002	11
Registered Nurses	2,040	\$38.72	\$80,551	6
Customer Service Representatives	2,020	\$15.72	\$32,714	10
Elementary School Teachers, Except Special Education	1,720	[3]	\$61,838	5
Laborers and Freight, Stock, and Material Movers, Hand	1,650	\$10.91	\$22,684	11
Office Clerks, General	1,480	\$12.22	\$25,417	11
Truck Drivers, Heavy and Tractor-Trailer	1,330	\$19.49	\$40,523	10
General and Operations Managers	1,260	\$43.19	\$89,818	4
Child Care Workers	1,230	\$9.22	\$19,194	11
Secondary School Teachers, Except Special and Vocational Education	1,180	[3]	\$57,136	5

Source: State of California EDD (Employment Development Department)

2008-2018 Fastest Growing Occupations - Fresno County

Occupational Title	Annual Average Employment		Percent Change	2010-1st Quarter Wages		Education & Training Levels [3]
	2008	2018		Median Hourly [1]	Median Annual [1]	
Personal and Home Care Aides	8,950	11,060	23.6	\$9.73	\$20,244	11
Registered Nurses	5,600	6,660	18.9	\$38.72	\$80,551	6
Customer Service Representatives	4,080	4,820	18.1	\$15.72	\$32,714	10
Security Guards	3,270	3,680	12.5	\$9.40	\$19,540	11
Medical Assistants	2,260	2,600	15.0	\$13.47	\$28,016	10
Home Health Aides	1,560	2,000	28.2	\$9.29	\$19,316	11
Tax Examiners, Collectors, and Revenue Agents	1,390	1,560	12.2	N/A	N/A	5
Sales Managers	1,080	1,230	13.9	\$35.18	\$73,185	4
Social and Human Service Assistants	940	1,060	12.8	\$15.27	\$31,746	10
Coaches and Scouts	880	1,010	14.8	[2]	\$34,087	9
Instructional Coordinators	870	1,030	18.4	\$32.68	\$67,977	3
Pharmacy Technicians	830	1,020	22.9	\$16.28	\$33,867	10

Source: State of California EDD (Employment Development Department)

The 2012 Fresno County Employment Study (n=1,713)

Occupational Sector	Projected new jobs in next 3 years
Informational Technology	930
Renewable Energy	162
Automotive Technology	908
Logistics and Distribution	1,680
Manufacturing	2,554
Agribusiness	3,124
Professional/Technical	3,749
Healthcare	3,675
Construction/Trades	2,171

Source: Fresno Regional Workforce Investment Board

The 2012 Fresno County Employment Study (n=1,713)

Change in Overall Employment by Industry

Table 1. Change in Overall Employment by Industry

	2007	2008	2009	2010	2011	2007 to 2010
Agribusiness	20,615	20,941	19,745	18,288	18,918	(1,697)
Construction/Trades	19,186	20,976	19,312	17,178	18,338	(848)
Manufacturing	23,502	24,266	20,319	19,860	20,441	(3,061)
Logistics/Distribution	17,902	19,573	16,427	15,304	16,355	(1,547)
Automotive	4,770	5,021	4,383	4,078	4,230	(540)
Healthcare	34,452	41,527	37,094	36,502	37,147	2,695
Total Change (+ -)						(4,998)

Source: Fresno Regional Workforce Investment Board

The 2012 Fresno County Employment Study (n=1,713)

Change in the Number of Businesses by Industry

Table 2. Change in the Number of Businesses by Industry

	Number of Businesses					2007-2010
	2007	2008	2009	2010	2011	
Agribusiness	2,496	2,650	2,281	2,443	2,556	60
Construction/Trades	3,021	3,490	2,905	3,099	3,563	542
Manufacturing	1,591	1,763	1,414	1,301	1,349	(242)
Logistics/Distribution	1,731	2,028	1,776	1,667	2,081	350
Automotive	1,335	1,475	1,245	1,110	1,239	(96)
Healthcare	2,882	3,393	2,894	2,797	3,017	135
Total Businesses Decline						749

Source: Fresno Regional Workforce Investment Board

The 2012 Fresno County Employment Study

Major obstacles facing your business today?

1) Market Conditions– 408 responses or 24%

- Overall bad economy creating heightened sense of concern among consumers
- Demand, and therefore sales, have slowed
- Customers do not have disposable income for non-necessities
- Customers are being denied financing
- Payment cycle shortening while clients' revenue takes longer to collect
- Impending water issues

2) Labor Availability and Cost– 300 responses or 18%

- Lack of qualified workers for technical and high-skill positions
- High turnover
- Cost of labor – taxes, liability insurance, workers compensation insurance, health insurance, etc.
- Uncertainty about impact of healthcare reform on costs of benefits
- Employee drug use
- Job seekers/employees are unwilling to accept entry-level jobs
- Job seekers lack personal responsibility and accountability
- Job seekers' poor skills and lack of training
- Job seekers' basic comprehension – cannot read or follow instructions

Source: Fresno Regional Workforce Investment Board

The 2012 Fresno County Employment Study

Major obstacles facing your business today?

3) Cost of Doing Business– 274 responses or 16%

- Shrinking profit margins due to growing costs
- Cost of compliance forces focus away from sustainability and growth
- Highly litigious job seekers and employees drives up insurance costs
- High state and federal taxes, cost of employees, worker compensation, payroll taxes, healthcare
- High cost of materials, utilities and labor
- No capital to buy new equipment or automate

4) Regulatory Constraints/State and Federal Regulations– 181 responses or 11%

- The regulatory and permitting process impede business operations and growth
- Regulations continuing to change with no efficient way to stay informed or be proactive
- Standards are high with excessive fees; limited technical assistance provided
- Permitting process is difficult to maneuver and not business-friendly
- Rigid certification requirements
- Air standards extremely difficult to meet
- New emissions standards
- Licensing
- New oversight boards and large fees

Source: Fresno Regional Workforce Investment Board

The 2012 Fresno County Employment Study **Major obstacles facing your business today?**

5) Competition– 164 responses or 9.6%

- Undercutting of bids
- Competition with low-cost businesses that skirt regulatory issues to cut costs
- Overseas competition
- Competitors in neighboring states can operate for less and charge less

6) Access to Capital– 116 responses or 6.8%

- Resistance to lending
- Can not accurately forecast sales to support loans

Source: Fresno Regional Workforce Investment Board

Recent Legislation Changes

- SB 1456 (Student Success Act of 2012)
- New Title 5 Regulations on Enrollment Priorities
- SB 1440 (Student Transfer Achievement Reform Act, 2010)
- Passage of Prop 30

SUMMARY OF DATA

Enrollment Trend

- ❑ FCC student enrollment reached the peak during 2009-2010. Then the enrollment started to decline as planned.
- ❑ 53% of FCC students came from 10 zip codes. Over 2,000 students came from 92722 (NW/New Fig area). 1,708 from 93727 (Sunnyside)
- ❑ FCC shared 4 zip codes with Willow International for the top 10 zip codes.
- ❑ About 10% of FCC students concurrently enrolled at other district college campuses/centers.

Demographic Trend

- ❑ In the past 6 years, FCC enrolled more Hispanic students (+10%).
- ❑ The number of full-time students has slightly increased (+3%).
- ❑ FCC has attracted more younger students in recent years.
- ❑ Over 40% of our students are first generation.
- ❑ Over 70% of our students are low income. This group of students increased by nearly 20% in the past 6 years.

Student Success

- ❑ In general, summer students are more successful than fall and spring students in terms of GPA, retention and success rates.
- ❑ About 90% of FCC summer students came within the district.
- ❑ When compared with other groups, performance gaps were observed for African American and Hispanics students.
- ❑ In the past 3 years, students' academic performance has been improving for all ethnic groups.

Student Success

- ❑ **Academically, females are more successful than males.**
- ❑ **Performance of students in DE classes has been improving in the past years. However, DE students still have relatively lower retention and success rates.**
- ❑ **New student cohort was tracked for 4 years, 63% of FCC students left without completing a degree/certificate or transfer.**

Student Success

- ❑ **Over 65% of our students were placed into basic skills English/ESL or math. About 20% of them did not take placement tests.**
- ❑ **Vast majority of our new students did not take English/ESL (76%) or Math (90%) during their first semester.**
- ❑ **If students were placed into 200 levels of English/ESL or math, their chances of progressing to transfer level were slim.**
- ❑ **On average, it took students 10-11 semesters to get an AA/AS degree. In recent 3 years, it took longer for students to graduate.**
- ❑ **More FCC students were transferring in recent years. However, the transfer rates of African American and Hispanic students were lower than other groups.**

FCC Employees

- ❑ The number of FCC full-time employees has been decreasing in recent years.
- ❑ In the past 3 years, FCC lost more Hispanic and White employees.
- ❑ When compared to SCCC service area, Hispanic employees are underrepresented and White employees are overrepresented.
- ❑ When compared to SCCC service area, Hispanic and White students are underrepresented. Asian students are overrepresented.

External Environment

- ❑ It is projected that all our service area counties will experience population growth in the next 10 years (Fresno +29%). However, the projected high school graduates remain stable.
- ❑ FCC is serving a very disadvantaged population.
- ❑ The population within our service area has a relatively low educational attainment. In Fresno County, only 21% of the population earned a bachelor's degree or higher.
- ❑ Fresno County also had lower household income and more people live in poverty.

External Environment

- ❑ FCC service area economy is among the most depressed in the state.
- ❑ In Fresno County, many job openings only require short-term on-the-job training.
- ❑ The fastest growing occupations in Fresno County are health care related.
- ❑ It is projected the businesses in Fresno County will add more jobs in next 3 years, especially in professional/technical, health care, agribusiness, manufacturing, and construction/trades.