

FULLERTON COLLEGE

ENVIRONMENTAL SCAN

2006



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Environmental Scan of the Fullerton College Community

This is the fifth annual report designed to provide a comprehensive look at the external environment impacting Fullerton College. It summarizes the demographic, economic and educational changes at the state and national levels, in general, and in Orange County and the cities served by Fullerton College, more specifically, that are shaping the future for the college.

The Environmental Scan of the Fullerton College community and Orange County also serves as a companion piece to the 2006 Fullerton College Fact Book, a comprehensive internal overview that describes the college's student population and how effectively it is being served by the college. Together, these two documents provide important information about the changing forces affecting Fullerton College as it moves forward in the 21st century. By monitoring these changes, Fullerton College will be in a better position to plan a direction that will best serve its students.

PART I. DEMOGRAPHIC INFORMATION

The 2000 Decennial Census showed that Orange County had a population of 2,846,289, an increase of nearly 20% since the 1990 census. With a 2006 population of over 3 million, Orange County is among the faster growing metropolitan areas, not only in California, but in the entire country. Growth for the Fullerton College community cities was only slightly less at 17.1%, with Anaheim growing nearly 25%. Over the past year, Fullerton College community cities mirrored the county growth of slightly less than 1%.

As the population has continued to grow in north Orange County, Fullerton College has seen greater demands placed upon its educational resources, facilities and programs. Population growth is projected to continue at high levels, exceeding the national average of about 10% for this decade.

TOTAL POPULATION THROUGH 2006

Table 1: Population in Orange County, California and the U.S. through 2006

Area	2002	2003	2004	2005	2006	Change 2002 - 2006
Orange County	2,940,743	2,983,731	3,019,889	3,047,054	3,072,336	4.5%
California	35,088,671	35,691,472	36,245,016	36,728,196	37,172,015	5.9%
United States	287,984,799	290,850,005	293,656,842	296,410,404	299,359,000	3.9%

Sources: State of California, Department of Finance, Population Estimates for Cities, Counties and the State, 2001-2006, Sacramento, California, May 2006; U. S. Bureau of the Census

COMMUNITY LEVEL POPULATION THROUGH 2006

Table 2: Population in Fullerton College Community through 2006

City	2002	2003	2004	2005	2006	Change 2002 - 2006
Anaheim	335,197	337,975	341,044	341,808	342,410	2.2%
Brea	36,908	37,959	38,991	39,441	39,560	7.2%
Fullerton	129,494	131,654	134,293	135,194	136,428	5.4%
La Habra	60,786	61,272	61,504	61,551	61,789	1.7%
Placentia	48,386	49,164	49,932	50,142	51,236	5.9%
Yorba Linda	60,890	62,765	64,042	65,382	66,794	9.7%
Total	671,661	680,789	689,806	693,518	698,217	4.0%

Source: State of California, Department of Finance, Population Estimates for Cities, Counties and the State, 2001-2006, Sacramento, California, May 2006.

Total Population: Changes to the Year 2030

According to projections by the California Department of Finance, total population in Orange County is projected to grow by 11.9% between 2000 and 2010. And according to projections by the Center for Demographic Research at California State University, Fullerton, the population of the Fullerton College community is projected to grow by 10.0% during the same period. This compares to projected state growth of 16.4% and the nation's 8.6%. While the projected percentage increase in the Fullerton College community and Orange County will not keep pace with the state's projected growth, there will be a projected population growth of over 30,000 in the Fullerton College community and nearly 350,000 in Orange County through this decade.

By the year 2030, Orange County is projected to grow by nearly 33% over its 2000 levels, compared with the state's 51.1% and the nation's 26.6%. By the year 2025, the Fullerton College community is projected to grow by 18%, representing a population increase of over 100,000.

Not only have Orange County and the Fullerton College community seen tremendous growth over the last 20 years, the area will grow substantially over the next 10 years and beyond. Evaluation of population changes as they relate to plans for facility and program development are critical to the college's ability to meet the educational needs of the area's citizens and the workforce needs of the community. And understanding and anticipating population growth by community provides important information for recruiting new students to the colleges, as well as locating off-campus programs to meet community needs.

Table 3: Population Changes in Orange County, California and the U.S. through 2030

Area	2000	2010	2020	2030	Projected Change to 2010	Projected Change to 2020
Orange County	2,854,026	3,260,162	3,526,144	3,665,343	14.2 %	23.6 %
California	34,043,198	39,246,767	43,851,741	48,110,671	15.3 %	28.8 %
United States	282,125,000	308,936,000	335,805,000	363,584,000	9.5 %	19.3 %

Sources: U. S. Bureau of the Census; State of California, Department of Finance.

COMMUNITY LEVEL POPULATION: CHANGES TO THE YEAR 2030

Table 4: Population Changes in Fullerton College Community through 2030

City	2005	2010	2015	2020	2025	2030	Projected Change to 2030
Anaheim	343,932	365,495	376,310	380,945	383,278	383,739	11.6%
Brea	39,204	42,281	43,597	45,257	46,532	46,947	19.8%
Fullerton	133,505	140,513	144,045	146,715	148,241	149,711	12.1%
La Habra	62,496	65,773	67,256	68,055	68,481	68,576	9.7%
Placentia	49,864	52,352	53,638	54,338	54,756	55,164	10.6%
Yorba Linda	66,901	71,463	74,040	75,611	76,316	76,811	14.8%
Total	695,902	737,877	758,886	770,921	777,604	780,948	12.2%

Source: California State University, Fullerton, Center for Demographic Research

ETHNIC COMPOSITION OF THE TOTAL POPULATION CENSUS 2000

The ethnic and racial mix of California, Orange County and the Fullerton College community has been rapidly changing for the past 10 years. The inclusion of new racial/ethnic categories in Census 2000 has allowed individuals to indicate two or more races for the first time in United States history. California has been a non-majority state for several years, and Orange County no longer has a white majority. The cities comprising the Fullerton College service area also have no racial majority. Both Anaheim and La Habra now have Hispanic pluralities.

In 2000, 1.5% of the Orange County population was African American, 13.8% was Asian/Pacific Islander, 30.8% was Hispanic, 0.3% was American Indian/Alaskan Native and 51.2% was White, 0.2% was Other, and 2.3% was two or more races.

Table 5: Proportions of the Population by Ethnicity in Orange County and California: Census 2000

Area	African American	Asian/Pacific Islander	Hispanic	American Indian/Alaskan Native	White	Other	Two or More Races
Fullerton College	3.1%	14.6%	32.1%	0.7%	42.6%	0.8%	-
Orange County	1.5%	13.8%	30.8%	0.3%	51.2%	-	2.3%
California	6.4%	11.1%	32.4%	0.5%	46.7%	-	2.7%

Source: Fullerton College Office of Institutional Research, U.S. Bureau of the Census

Table 6: Proportions of the Population by Ethnicity in Orange County and California: 2005

Area	African American	Asian/Pacific Islander	Hispanic	American Indian/Alaskan Native	White	Other	Two or More Races
Fullerton College	3.5%	15.4%	35.1%	0.7%	38.1%	1.8%	-
Orange County	1.9%	15.8%	32.2%	0.9%	48.7%	-	2.0%
California	6.8%	12.5%	34.7%	1.2%	44.5%	-	2.4%

Source: Fullerton College Office of Institutional Research, U.S. Bureau of the Census

Table 7: Fullerton College Community Population by Ethnicity: Census 2000

City	African American	Asian/Pacific Islander	Hispanic	American Indian/Alaskan Native	White	Other	Two or More Races
Anaheim	7,939	40,182	153,374	1,049	117,607	457	7,406
Brea	409	3,255	7,205	111	23,541	57	832
Fullerton	2,675	20,381	38,014	404	61,420	237	2,872
La Habra	808	3,521	28,922	188	24,399	95	1,041
Placentia	746	5,186	14,460	177	24,967	61	891
Yorba Linda	638	6,552	6,044	139	44,071	138	1,336
Total	13,215	79,077	248,019	2,068	296,005	1,045	14,378

Source: State of California, Department of Finance.

In 2000, 2.0% of the Fullerton College service area population was African American, 12.1% was Asian/Pacific Islander, 37.9% was Hispanic, 0.3% was American Indian/Alaskan Native, 45.3% was White, 0.2% was Other, and 2.2% was two or more races.

Table 8: Fullerton College Community Population Percentage by Ethnicity: Census 2000

City	African American	Asian/ Pacific Islander	Hispanic	American Indian/ Alaskan Native	White	Other	Two or More Races
Anaheim	2.4%	12.3%	46.8%	0.3%	35.9%	0.1%	2.3%
Brea	1.2%	9.2%	20.3%	0.3%	66.5%	0.2%	2.3%
Fullerton	2.1%	16.2%	30.2%	0.3%	48.7%	0.2%	2.3%
La Habra	1.4%	6.0%	49.0%	0.3%	41.4%	0.2%	1.8%
Placentia	1.6%	11.2%	31.1%	0.4%	53.7%	0.1%	1.9%
Yorba Linda	1.1%	11.1%	10.3%	0.2%	74.8%	0.2%	2.3%
Total	2.0%	12.1%	37.9%	0.3%	45.3%	0.2%	2.2%

Source: State of California, Department of Finance.

CHANGES IN THE ETHNIC COMPOSITION OF THE TOTAL POPULATION THROUGH 2040

Table 9: Projected Population by Ethnicity in Orange County and California through 2040

		African American	American Indian/ Alaskan Native	Asian/ Pacific Islander	Hispanic	White
Orange County	2000	43,717	8,714	397,988	880,754	1,477,117
	2010	52,852	26,869	541,231	1,180,042	1,402,620
	2020	55,581	33,606	648,587	1,460,289	1,263,850
	2030	53,453	32,577	641,740	1,659,771	1,205,860
	2040	48,927	29,405	594,923	1,822,070	1,133,000
California	2000	2,222,816	192,753	3,857,492	11,082,985	16,047,989
	2010	2,628,971	398,048	4,865,058	15,181,594	15,377,948
	2020	2,935,929	615,393	5,750,108	18,877,590	14,757,146
	2030	3,192,662	815,054	6,369,365	22,520,629	14,182,100
	2040	3,363,142	982,073	6,690,626	25,959,527	13,435,378

Source: State of California, Department of Finance.

Table 10: Projected Population Percent by Ethnicity in Orange County and California to 2040

		African American	American Indian/ Alaskan Native	Asian/ Pacific Islander	Hispanic	White
Orange County	2000	1.6%	0.3%	14.2%	31.4%	52.6%
	2010	1.6%	0.8%	16.9%	36.8%	43.7%
	2020	1.6%	1.0%	18.7%	42.2%	36.5%
	2030	1.5%	0.9%	17.9%	46.2%	33.6%
	2040	1.3%	0.8%	16.4%	50.2%	31.2%
California	2000	6.7%	0.6%	11.5%	33.2%	48.0%
	2010	6.8%	1.0%	12.7%	39.5%	40.0%
	2020	6.8%	1.4%	13.4%	44.0%	34.4%
	2030	6.8%	1.7%	13.5%	47.9%	30.1%
	2040	6.7%	1.9%	13.3%	51.5%	26.6%

Source: State of California, Department of Finance.

Noting changes in the ethnic composition of the population, particularly growth of groups that have traditionally been under-represented in higher education is important to understand. Support services that are needed may be different for student groups that have traditionally been under-represented, as their numbers begin to increase.

These data indicate that there is stronger growth in population groups that have traditionally been under-represented in higher education. These changes will have important planning implications for the college.

PART II: EDUCATIONAL INFORMATION

SCHOOL AGE POPULATION: CHANGES THROUGH 2005-2006

Table 11: Public School Enrollment in Orange County and California, 2001-2002 to 2005-2006

	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	Change 2001 - 2005
Orange County	503,351	512,105	515,464	513,744	510,114	1.3%
California	6,147,375	6,244,732	6,298,747	6,322,096	6,312,393	2.7%

Source: State of California, Department of Education, Data Quest (<http://dq.cde.ca.gov/dataquest/>).

Table 12: Public School Enrollment Projections for Orange County and California to 2009-10

	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	Change 2005 - 2009
Orange County	510,031	506,571	502,481	497,989	493,822	-3.2%
California	6,293,201	6,305,935	6,316,440	6,322,075	6,328,683	0.6%

Source: State of California, Department of Finance. *California Public K-12 Enrollment and High School Graduate Projections by County, 2005 Series*. Sacramento, California. Updated December 2005

Table 13: Public School Enrollment in Fullerton College Feeder High School Districts, 2001-2002 to 2005-2006

	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	Change 2000 - 2005
Anaheim	30,258	31,338	32,468	32,975	33,112	9.4%
Brea-Olinda	1,996	2,020	2,076	2,136	2,196	10.0%
Fullerton	15,500	16,195	16,398	16,742	16,299	-5.2%
Placentia-Yorba Linda	7,511	7,743	7,973	8,348	8,602	14.5%

Source: State of California, Department of Education, Data Quest (<http://dq.cde.ca.gov/dataquest/>).

For the first time there has been a decline in the Fullerton district high school enrollment. While there has been substantial growth over the past 5 years in all high school districts, that growth has slowed significantly in Anaheim and slightly in Placentia-Yorba Linda.

Table 14: Fullerton College Top 10 Feeder High Schools: Demographic Indicators

School	Total Students	Percent Hispanic	Percent Free or Reduced Lunch	Percent English Language Learners	Percent Disadvantaged	Percent Parents Less than College Education
Anaheim	2,842	93%	72%	42%	77%	92%
Brea Olinda	2,127	22%	13%	3%	11%	39%
El Dorado	2,410	13%	7%	3%	6%	40%
Esperanza	3,178	10%	5%	2%	6%	32%
Fullerton	2,299	49%	21%	18%	26%	69%
Katella	2,376	75%	58%	32%	55%	82%
La Habra	2,410	53%	1%	15%	15%	66%
Sonora	2,028	48%	0%	18%	6%	61%
Sunny Hills	2,525	15%	3%	7%	5%	37%
Troy	2,323	13%	3%	4%	5%	25%

Source: State of California, Department of Education, Data Quest (<http://dq.cde.ca.gov/dataquest/>).

Table 15: Fullerton College Top 10 Feeder High Schools: Academic Indicators

School	API Score	API Rank	API Comp Rank	Percent UC/CSU Eligible Grads	Language Arts Proficient	Math Proficient
Anaheim	613	2	6	8%	24%	23%
Brea-Olinda	805	9	7	39%	63%	31%
El Dorado	812	10	9	41%	64%	45%
Esperanza	834	10	8	49%	69%	57%
Fullerton	735	7	8	46%	40%	14%
Katella	651	4	5	26%	35%	27%
La Habra	748	8	7	39%	46%	19%
Sonora	737	8	4	54%	46%	16%
Sunny Hills	807	10	3	58%	58%	35%
Troy	910	10	10	76%	81%	66%

Source: State of California, Department of Education, Data Quest (<http://dq.cde.ca.gov/dataquest/>).

The selected indicators reveal great variability in the characteristics of the top feeder high schools to Fullerton College and point to some of the challenges facing the faculty, staff, and administration of the college in both providing access and promoting success. Many of the students who will be entering Fullerton College over the next several years are from under-represented groups, have fewer economic resources, are English language learners, and first-generation college-goers. Relatively few have pursued an educational program which prepared them for entry to California State University or University of California campuses.

Table 16. Higher Education Going Rates of Fullerton College Feeder High Schools

High School	Total Graduates	Fullerton College	Total CCC	Total CSU	Total UC	Total Higher Education	Fullerton College Going Rate	Higher Education Going Rate
Anaheim	394	108	185	20	11	216	27.4%	54.8%
Cypress	444	10	160	71	38	269	2.3%	60.6%
Katella	418	104	204	15	11	231	24.9%	55.3%
Kennedy	416	33	158	67	43	268	7.9%	64.4%
Loara	441	79	214	51	15	280	17.9%	63.5%
Magnolia	299	29	104	39	23	166	9.7%	55.5%
Savanna	421	79	175	43	14	232	18.8%	55.1%
Western	361	18	145	21	12	178	5.0%	49.3%
Brea-Olinda	449	153	207	73	36	316	34.1%	70.4%
Buena Park	368	68	120	29	19	168	18.5%	45.7%
Fullerton	376	146	179	53	14	246	38.8%	65.4%
La Habra	434	114	175	44	12	231	26.3%	53.2%
Sonora	430	127	161	75	28	264	29.5%	61.4%
Sunny Hills	537	148	214	59	104	377	27.6%	70.2%
Troy	453	124	150	69	74	293	27.4%	64.7%
El Dorado	440	133	225	73	28	326	30.2%	74.1%
Esperanza	643	107	282	122	68	472	16.6%	73.4%
Valencia	391	90	200	35	13	248	23.0%	63.4%
Total	7,715	1,670	3,258	959	563	4,781	21.6%	62.0%

Source: California Postsecondary Education Commission, Online Data System, <http://www.cpec.ca.gov/OnLineData/OnLineData.asp>

Significant differences exist between the Fullerton College going-rate and the overall community college going-rate, indicating opportunities for recruitment of at least some students from the college's major feeder districts.

PART III. ECONOMIC TRENDS

Importance of Economic Changes

Community colleges are the higher education segment providing workforce education that is most directly related to the local area economy. Understanding the changing nature of the area's economy is critical to aligning current academic programs as well as developing new academic programs that meet the needs of local business and industry. What follows is a synopsis of the key economic changes in Orange County important to educational planning in Fullerton College.

The Employment Base

Table 17: Civilian Labor Force, Employment, and Unemployment for Orange County

Measures	2003	2004	2005	2006	Change 2005 - 2006
Civilian Labor Force	1,559,600	1,594,900	1,633,700	1,607,300	-1.6%
Employed	1,479,200	1,521,500	1,570,300	1,550,000	-1.3%
Unemployed	80,400	73,400	63,400	57,200	- 9.8%
Unemployment Percent	5.2%	4.6%	3.9%	3.6%	-0.3%

Source: California Employment Development Department

Table 18: Civilian Labor Force, Employment, and Unemployment for Fullerton College Area, 2006

Measures	Anaheim	Brea	Fullerton	La Habra	Placentia	Yorba Linda
Civilian Labor Force	174,100	21,800	72,000	31,900	28,200	35,800
Employed	166,000	21,200	68,900	30,300	27,300	35,000
Unemployed	8,100	600	3,100	1,600	900	800
Unemployment Percent	4.7%	2.7%	4.3%	4.9%	3.2%	2.3%

Source: California Employment Development Department

For the first time in this century, the civilian labor force and the number of employed individuals has declined in Orange County.

Table 19: Employment by Industry in Orange County: 2005 and 2006

Industry	July 2005	July 2006	Change	Percent Change
Natural Resources and Mining	600	700	100	16.7%
Construction	98,200	104,000	5,800	5.9%
Manufacturing	184,400	182,700	-1,700	-0.9%
Trade, Transportation and Utilities	268,700	269,200	500	0.2%
Information	32,200	31,700	-500	-1.6%
Financial Activities	132,800	138,300	5,500	4.1%
Professional and Business Services	274,000	275,800	1,800	0.7%
Educational and Health Services	130,500	133,900	3,400	2.6%
Leisure and Hospitality	169,200	172,300	3,100	1.8%
Other Services	48,800	49,100	300	0.6%
Government	149,000	150,300	1,300	0.9%

Source: California Employment Development Department

Table 20: Projected Growth in Top 10 Orange County Occupations Requiring an Associate Degree or Post-Secondary Vocational Training

Occupation	2002	2012	Change	Percent Change
Physical Therapist Assistants	440	590	150	34.1
Industrial Engineering Technicians	970	1,110	140	14.4
Mechanical Engineering Technicians	680	820	140	20.6
Massage Therapists	440	570	130	29.5
Mobile Heavy Equipment Mechanics	610	740	130	21.3
Medical and Laboratory Technicians	860	980	120	14.0
Appraisers and Assessors of Real Estate	520	640	120	23.1
Medical Transcriptionists	480	600	120	25.0
Desktop Publishers	470	590	120	25.5
Security and Fire Alarm Installers	510	620	110	21.6

Source: California Employment Development Department

Table 21: Projected Growth in Top 10 Orange County Occupations Requiring a Four-Year Degree

Occupation	2002	2012	Change	Percent Change
General and Operations Managers	25,000	30,460	5,460	21.8
Elementary School Teachers	15,680	20,690	5,010	32.0
Business Operations Specialists	13,280	17,470	4,190	31.6
Computer Software Engineers, Applications	11,380	15,130	3,750	33.0
Secondary School Teachers	9,520	12,890	3,370	35.4
Teachers, All Other	4,360	7,090	2,730	62.6
Accountants and Auditors	10,970	13,540	2,570	23.4
Sales Managers	5,330	7,180	1,850	34.7
Financial Managers	7,120	8,930	1,810	25.4
Computer Software Engineers, Systems Software	4,490	6,130	1,640	36.5
Management Analysts	6,140	7,750	1,610	26.2

Source: California Employment Development Department

PART IV. POLITICAL TRENDS IMPACTING FULLERTON COLLEGE

Importance of Monitoring Political Trends

National, state and local level priorities in both the policy and fiscal arenas greatly influence direction setting for North Orange County Community College District and Fullerton College. Several key issues are likely to impact local policy. These include issues related to: accountability; accreditation; budget; general enrollment growth, as it relates to facilities planning; local population growth related to environmental concerns; distance learning; and part-time faculty.

Accountability

Accountability remains a top priority, particularly at the system office and legislature. Special state funding was provided in 1998, through the Partnership for Excellence program, to insure that students are being academically well prepared to meet employment challenges and academic challenges upon transfer to four-year institutions of higher education has been incorporated into the district base budget. However, some funds were cut because of disappointment with the California Community College system reporting of accountability. Legislation signed in the last year restored those funds and imposed a new system-developed model of accountability, with the first reports due in 2006. And new accreditation standards from the Accrediting Commission for Community and Junior Colleges of the Western Association of Schools and Colleges have focused on the identification and measurement of student learning outcomes. Several legislative proposals have moved in the direction of incorporating student learning outcomes in a new state accountability reporting system. Greater attention should probably be paid to developments in the K-12 system and full advantage should be taken of the Cal-PASS database.

Accreditation

Accountability challenges related to performance are requiring more comprehensive monitoring of student outcomes data related to special initiatives developed to improve student performance. And the new WASC AACJC accreditation standards require colleges to evaluate student outcomes beyond the institutional effectiveness emphasis of the previous standards. The new standards place strong emphasis on measuring true learning outcomes, not simply grades in courses and course retention and success. In addition, the standards have re-emphasized the need for integration of the college's many planning activities, with an emphasis on the integration of planning and budgeting. The past year marked Fullerton College's one year follow-up response to the accreditation visit and reaffirmation of accreditation. Recommendations of the commission provide one focus for Fullerton College planning.; the college's own planning agenda outlines ambitious directions for the college. These challenges will require a coordinated research and evaluation effort throughout the college and increased emphasis on faculty development of measures of learning outcomes, in both the general education core and in specific disciplines.

Budget

Shortfalls in the California budget in the recent budget years have been reversed and community college funding has increased substantially this year. Serious budget cuts to several important areas in student services and faculty and staff development and well as to the general appropriation led to a steep decline in enrollment from which the college is now recovering. The current budget has led to restoration of classes and increased enrollment. Planning of enrollment growth must be carefully monitored. Bond construction project costs have added an additional challenge to budgeting at Fullerton College.

Enrollment Growth and Facilities Planning

Projections indicate that Fullerton College will face a growing student population over the next decade. Accommodating three to five-percent-plus enrollment growth annually over the next several years will provide a major facilities planning challenge for the college. In addition, modernization of infrastructure, construction of new facilities, planned maintenance, technology growth, and adequate parking will require significant resources. The addition of significant outreach efforts (Anaheim facility, off-campus educational offerings, distance education) will require significant planning and coordination efforts. The passage of the bond offering in the District has contributed significantly to meeting the required financing while at the same time adding to the planning demand and budget challenges.

Distance Learning

With the expansion of on-line learning opportunities for students, issues of faculty training and development, intellectual property rights,, adequacy of technical infrastructure and evaluation of learning are becoming major pieces of the accountability concerns for this relatively new mode of student learning. Preparation of students for and evaluation of learning in distance education programs is becoming an important priority for all institutions of higher education.

Importance of These Political Trends

These five political trends are likely to have an important influence on setting the policy agenda for the district for the upcoming year and beyond. All have important implications for budget planning, program planning, research, evaluation and communication across the college and with the large community of which it is an integral part.