

Environmental Scan of the Fullerton College Community and Orange County

This is the third annual report designed to provide a comprehensive look at the external environment impacting Fullerton College. It summarizes the demographic and economic 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 2003-04 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 Trends

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 an April 2004 population of almost 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%.

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

Total Population through 2003

Table 1: Population in Orange County, California and the U.S. through 2003

Area	2000	2001	2002	2003	2004	Change 2000 - 2004
Orange County	2,846,289	2,880,200	2,939,500	2,978,800	2,978,800	4.6%
California	33,871,648	34,385,000	35,037,000	35,591,000	35,591,000	5.1%
United States	281,421,906	284,796,887	287,973,924	290,809,777	290,809,777	3.3%

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

Community Level Population through 2003

Table 2: Population in Fullerton College Community through 2003

City	1990	2000	2001	2002	2003	Change 2000 - 2003
Anaheim	266,406	328,014	330,200	334,700	337,400	2.9%
Brea	32,873	35,410	35,750	36,850	37,950	7.2%
Fullerton	114,144	126,003	127,300	129,300	131,500	4.4%
La Habra	51,266	58,974	59,700	60,700	61,200	3.8%
Placentia	41,259	46,488	46,900	48,300	49,100	5.6%
Yorba Linda	52,422	58,918	59,400	60,800	62,700	6.4%
Total	558,370	653,807	659,250	670,650	681,853	4.3%

Source: State of California, Department of Finance.

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 over the next ten years.

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 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	2,828,400	3,163,776	3,431,869	3,752,003	11.9%	21.3%
California	34,336,000	39,957,616	45,448,627	51,868,655	16.4%	32.4%
United States	274,024,000	299,862,000	324,927,000	351,070,000	9.4%	18.6%

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

Community Level Population: Changes to the Year 2025

Table 4: Population Changes in Fullerton College Community through 2025

City	2000	2005	2010	2015	2020	2025	Projected Change to 2010
Anaheim	310,654	327,908	345,627	350,202	350,998	368,480	11.3%
Brea	36,950	39,148	42,206	44,248	46,596	48,623	14.2%
Fullerton	128,300	130,742	135,508	140,794	145,169	147,666	5.6%
La Habra	56,800	59,757	61,513	52,393	63,310	63,832	8.3%
Placentia	50,200	52,397	54,012	56,002	57,331	58,083	7.6%
Yorba Linda	63,100	68,248	71,492	73,154	73,244	73,761	13.3%
Total	646,004	678,200	710,358	716,793	736,648	760,445	10.0%

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 cities have 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. In 2004, the percentage of Asian/Pacific Islanders and Hispanic had increased, while the percentage of Whites has declined.

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

Area	African American	American Indian/Alaskan Native	Asian/Pacific Islander	Hispanic	White	Two or More Races
Orange County	1.5%	0.3%	13.8%	30.8%	51.2%	2.5%
California	6.4%	0.5%	11.1%	32.4%	46.7%	2.9%

Source: State of California, Department of Finance.

Table 5A: Proportions of the Population by Ethnicity in Orange County and California: 2004

Area	African American	American Indian/Alaskan Native	Asian/Pacific Islander	Hispanic	White	Two or More Races
Orange County	1.6%	0.5%	15.0%	32.9%	48.3%	1.7%
California	6.7%	0.7%	11.4%	35.2%	43.9%	2.0%

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 6: 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.

Table 7: 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 8: Projected Population by Ethnicity in Orange County and California through 2040

		African American	Asian/ Pacific Islander	Hispanic	American Indian/ Alaskan Native	White
Orange County	2000	44,086	373,994	845,893	8,681	1,560,536
	2010	50,093	521,963	1,079,497	10,087	1,502,136
	2020	56,308	650,112	1,321,059	11,255	1,393,135
	2030	61,570	796,715	1,612,945	12,175	1,268,598
	2040	66,520	942,741	1,947,947	12,775	1,105,345
California	2000	2,337,935	3,999,427	10,688,752	205,770	17,421,511
	2010	2,540,500	5,313,750	13,964,050	237,325	17,901,991
	2020	2,806,398	6,474,153	17,778,492	266,259	18,123,325
	2030	3,023,660	7,786,065	22,546,894	290,128	18,221,908
	2040	3,233,649	9,091,920	28,091,397	309,468	18,004,572

Source: State of California, Department of Finance.

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

		African American	Asian/ Pacific Islander	Hispanic	American Indian/ Alaskan Native	White
Orange County	2000	1.6%	13.2%	29.8%	0.3%	55.1%
	2010	1.6%	16.5%	34.1%	0.3%	47.5%
	2020	1.6%	18.9%	38.5%	0.3%	40.6%
	2030	1.6%	21.2%	43.0%	0.3%	33.8%
	2040	1.6%	23.1%	47.8%	0.3%	27.2%
California	2000	6.7%	11.5%	30.8%	0.6%	50.2%
	2010	6.4%	13.2%	34.9%	0.6%	44.8%
	2020	6.2%	14.2%	39.1%	0.6%	39.9%
	2030	5.8%	15.0%	43.5%	0.6%	35.1%
	2040	5.5%	15.5%	47.8%	0.5%	30.7%

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.

School Age Population: Changes through 1999-2004

Growth in public school enrollments has continued at about 2% per year over the past five years and growth is projected to continue for several more years as the baby boom echo continues. Increased public school enrollment has fed Fullerton College's growth over the past three years and is projected to continue to fuel demands for greater access to Fullerton College.

Table 10: Public School Enrollment in Orange County and California, 1999-2000 to 2003-2004

	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	Change 1999-2004
Orange County	483,360	494,178	503,351	512,105	515,464	6.6%
California	5,951,612	6,050,895	6,147,375	6,244,403	6,298,769	5.8%

Source: California Department of Education.

Table 11: Public School Enrollment Projections for Orange County and California to 2009

	2005	2006	2007	2008	2009	Change 2005 - 2009
Orange County	534,669	538,040	539,544	537,944	535,493	0.1%
California	6,366,838	6,398,098	6,418,118	6,413,707	6,407,110	0.6%

Source: State of California, Department of Finance.

Table 12: Public School Enrollment in Fullerton College Feeder High School Districts, 1999 to 2004

	1999-2000	2000-01	2001-02	2002-03	2003-04	Change 1999 - 2004
Anaheim	17,700	18,395	18,818	19,346	20,245	14.4%
Brea-Olinda	2,002	2,005	1,996	2,020	2,076	3.7%
Fullerton	14,588	15,165	15,500	16,195	16,398	12.4%
Placentia-Yorba Linda	7,498	7,412	7,511	7,743	7,973	6.3%

Source: California Department of Education.

Table 13: Fullerton College Top 10 Feeder High Schools: Selected Indicators

School	Free or Reduced Lunch	English Language Learners	Disadvantaged	Hispanic	UC/CSU Eligible Grads
Anaheim	71.1%	38.9 %	8.2%	92%	13.9%
Brea Olinda	11.8%	6.3 %	0.2%	22%	4.6%
El Dorado	1.1%	2.8 %	1.1%	11%	41.6%
Esperanza	2.9%	2.3 %	1.4%	9%	52.4%
Fullerton	22.0%	19.7 %	5.7%	51%	41.4%
Katella	50.8%	26.6 %	7.0%	73%	24.7%
La Habra	6.6%	14.3 %	4.0%	52%	40.1%
Sonora	5.1%	17.6 %	3.0%	46%	45.0%
Sunny Hills	4.0%	11.2 %	1.7%	13%	55.0%
Troy	0.9%	16.4%	0.9%	5%	70.0%
Valencia	7.8%	24.0 %	5.1%	53%	21.6%

Source: California Department of Education

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.

Part II. Economic Trends -- Employment, Sector Growth

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.

Orange County Monthly Report from Employment Development Department

The unemployment rate in Orange County was 3.7 percent in July 2004, up from a revised 3.6 percent in June 2004, but below the year-ago estimate of 4.1 percent. This compares with an unadjusted unemployment rate of 6.5 percent for California and 5.7 percent for the nation during the same period.

Farm employment decreased by 1,100 jobs between June and July 2004, a normal seasonal change. Year-over farm employment declined by 300 jobs, a decrease of 4.6 percent.

Total nonfarm wage and salary employment in Orange County decreased by 8,100 jobs between June and July 2004, bringing the total number of nonfarm payroll jobs to 1,430,600. Government accounted for the largest drop (down 6,500 jobs), primarily due to seasonal cutbacks in local government education during summer recess. Other decreases were recorded in manufacturing and educational and health services (down 1,300 jobs each); trade, transportation and utilities (down 600 jobs); and other services (down 100 jobs). The largest increase occurred in leisure and hospitality (up 1,000 jobs). Month-over increases were also reported in professional and business services (up 400 jobs) and in construction (up 300 jobs). No over the month changes were posted in natural resources and mining, information or financial activities.

Compared with July 2003, total nonfarm wage and salary employment in July 2004 was up 3,000 jobs, an increase of 0.2 percent. Construction recorded the largest gain (up 4,600 jobs). Other industries with year-over payroll gains included financial activities (up 2,400 jobs), leisure and hospitality (up 2,000 jobs) and other services (up 500 jobs). Professional and business services posted the largest year over drop (down 2,400 jobs). Other job decreases were reported in government (down 1,300 jobs); information (down 1,100 jobs); manufacturing (down 900 jobs); educational and health services (down 600 jobs); and trade, transportation and utilities (down 200 jobs). Natural resources and mining remained unchanged over the year.

Source: California Employment Development Department

The Employment Base

Table 14: Civilian Labor Force, Employment, and Unemployment for Orange County

Measures	2000	2001	2002	2003	2004	Change 2000 - 2004
Civilian Labor Force	1,498,000	1,525,800	1,562,500	1,592,900	1,611,600	5.7%
Employment	1,461,800	1,486,400	1,504,100	1,528,000	1,552,300	4.5%
Unemployment	36,200	39,400	58,400	64,900	59,300	54.9%
Unemployment Percent	2.4%	2.6%	3.7%	4.1%	3.7%	1.3%

Source: California Employment Development Department

Table 15: Civilian Labor Force, Employment, and Unemployment for Fullerton College Area, 2004.

Measures	Anaheim	Brea	Fullerton	La Habra	Placentia	Yorba Linda
Civilian Labor Force	178,110	23,380	77,540	33,640	28,550	35,690
Employment	170,500	22,790	74,780	32,220	27,610	34,950
Unemployment	7,610	590	2,760	1,420	940	740
Unemployment Percent	4.3%	2.5%	3.6%	4.2%	3.3%	2.1%

Source: California Employment Development Department

Table 16: Employment by Industry in Orange County: 2000 and 2001

Industry	July 2003	July 2004	Change	Percent Change
Construction	83,300	83,300	0	0.0%
Educational and Health Services	124,300	123,700	-600	-0.5%
Financial Activities	122,900	125,300	2,400	2.0%
Government	149,400	148,100	-1,300	-0.9%
Information	34,400	33,300	-1,100	-3.2%
Leisure and Hospitality	163,500	165,500	2,000	1.2%
Manufacturing	181,000	180,100	-900	-0.5%
Natural Resources and Mining	5,000	5,000	0	0.0%
Other Services	46,600	47,100	500	1.1%
Professional and Business Service	256,400	254,000	-2,400	-0.9%
Trade, Transportation and Utilities	265,300	265,100	-200	-0.1%

Source: California Employment Development Department

Table 17: Projected Growth in Top Ten Orange County Occupations Not Requiring at Least a Four Year Degree

Occupation	2001	2008	Change	Percent Change
Retail Salespersons	44,760	51,250	6,490	14.5
Customer Service Representatives	23,190	29,020	5,830	25.1
Janitors	23,130	28,340	5,210	22.5
Office Clerks	33,940	38,740	4,800	14.1
Cashiers	33,270	37,850	4,580	13.8
Waiters & Waitresses	25,810	29,630	3,820	14.8
Food Prep & Serving	16,460	20,220	3,760	22.8
Security Guards	13,550	16,980	3,430	25.3
Landscapers	16,490	19,670	3,180	19.3
Laborers	20,080	23,260	3,180	15.8
TOTAL	250,680	294,960	44,280	17.6

Source: California Employment Development Department

Table 18: Projected Growth in Orange County Occupations Requiring at Least a Four Year Degree

Occupation	2001	2008	Change	Percent Change
General & Operations Managers	25,810	29,540	3,730	14.5
Computer Software Engineers, Applications	6,700	9,950	3,250	48.5
Computer Support Specialists	5,300	8,440	3,140	59.2
Registered Nurses	14,160	17,140	2,980	21.0
Elementary School Teachers	14,610	16,570	1,960	13.4
Network & Computer Systems Administrators	3,620	5,460	1,840	50.8
Accountants & Auditors	10,370	12,090	1,720	16.6
Computer Systems Analysts	4,640	6,270	1,630	35.1
Computer Software Engineers, Systems	3,000	4,510	1,510	50.3
Sales Managers	5,370	6,860	1,490	27.7
Total	93,580	116,830	23,250	24.8

Source: California Employment Development Department

Part III. 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 state level. Special state funding, through the Partnership for Excellence program (PFE), 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. A new model of accountability is probably not far down the road. 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.

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 will 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 will re-emphasize the need for integration of the college's many planning activities, with an emphasis on the integration of planning and budgeting. The year 2003-04 marked Fullerton College's Self Study for Reaffirmation of Accreditation, with the accreditation team visit scheduled for spring 2005. 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 previous and current budget years are projected to continue for several years. Serious budget cuts to several important areas in student services and faculty and staff development and well as the general appropriation led to a steep decline in enrollment. Fullerton College's response to budget curtailment determined how access to the college was maintained and how well students were served. The current budget has led to restoration of classes and increased enrollment. But additional needs which new students will bring to the college will strain the support services of the 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.

Distance Learning

With the expansion of on-line learning opportunities for students, issues of faculty training and development, intellectual property rights, copyright infringement, 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.

Part-time Faculty

Issues related to part-time faculty, including union representation, pay equity, benefits and responsibilities along with the high growth in the number of part-time faculty teaching community college courses statewide (an increase from 40% to 47% of all faculty from 1995 and 1999) will draw more attention. The part-time faculty issue was a major concern raised by a July 2000 State Auditor's study of eight community college districts. These issues could have long-term implications related to funding and resource allocation at the district and college level. In addition, it is critical to involve part-time faculty in staff development and technology training to promote student success.

Importance of These Political Trends

These six 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.