

SKYLINE COLLEGE  
ENVIRONMENTAL SCAN

Version One  
February 22, 2006

Demographics

Population will increase statewide by 41.3 percent from the year 2000 to 2030. San Mateo County's predicted growth rate (14.6%) is about one-third of California's forecasted growth. San Francisco County will grow only by 1.9 percent during this period. Of Bay Area Counties, only Alameda (40.5%) is expected to keep pace with overall state growth.<sup>1</sup>

Fundamental shifts are occurring among age categories in San Mateo County. From 1990 to 2004, the proportion of residents aged 25 to 44 as a share of the county's population decreased from 35.9 percent to 29.8 percent while the proportion of 45 to 64-year-old increased from 20.4 percent to 27.1 percent. The 20 to 24-year-old age range, a prime college-going cohort decreased from 7.2 percent to 5.2 percent.<sup>2</sup>

In the gap between aging baby boomers and "echo boomers" (those born between 1982 and 1995) will impact San Mateo County in fundamental ways by 2030. Offset by strong growth among Hispanics, these age ranges nonetheless will experience steep declines in overall numbers 34-35 (-13.8%), 35-39 (-14.8%), 40-44 (-13.6%), and 45-49 (-11.9%). Declines are steepest among Whites and somewhat less pronounced for Asians.<sup>3</sup>

Nationally, two-thirds of the 50 largest metropolitan areas had fewer young adults in 2000 than in 1990. These cities now realize that they've done little to appeal to the labor force that will shape their economic future: educated 25- to 34-year-olds.<sup>4</sup> San Mateo County is squarely in this category.

Eight percent (8.3%) of persons aged zero to 17 live in poverty in San Mateo County. The corresponding statistic for California is 19.6 percent.<sup>5</sup> According to GIS maps there are pockets of extreme wealth in the area surrounding the college as well as pockets of little wealth.

San Mateo County's racial and ethnic composition is undergoing marked change. From 1990 to 2004 the proportion of the county's White population decreased from 71.9 percent to 58.8 percent. The county's Black population decreased by half from 5.4 percent to 2.5 percent. Asians increased from 15.5 percent to 22.4 percent of the county's population. Citizens identifying themselves as "some other race" increased from 5.4 percent to 11.0 percent. Persons of Hispanic or Latino ethnicity increased from 17.6 to 21.9 percent over this time.<sup>6</sup>

Two-thirds (66%) of the 57,500 immigrants to the United States residing in the Bay Area in 2003-04 were from Asia. Other regions included Europe (9.2%), Mexico (9.3%), Central America (5.8%), Africa (2.6%), Oceania (1.7%), Canada (1.3%), and the Caribbean (0.3%). The

top five countries were: China, PR (9,074), India (8,755), Phillipines (6,590), Vietnam (4,660), and El Salvador (2,067).<sup>7</sup>

English was the predominant language of 6 of 10 San Mateo households in 2004. Other languages spoken at home include Spanish (17.6%), Asian (14.9%), and other Indo-European (5.0%). By language group, these households reported that they spoke English “less than well”: Spanish (46.7%), Asian (38.8%), and other Indo-European (25.6%).<sup>8</sup>

More than a sixth of the young adults (18- to 24-year-olds) in California have less than a high school education. This group, estimated to number 980,000, is larger than the share of new students predicted to enter the state’s community college system as a result of Title Wave II.<sup>9</sup>

Fewer than 18,000 General Education Diplomas (GEDs) were awarded to California 18- to 24-year-olds in 2000. The 3.1 percent ratio of GED awards to those with less than a high school education (18- to 24-year-olds only) places California at 49th of the 50 states on this measure.<sup>10</sup>

The education level of the adult population has been on an upward trajectory in San Mateo County since 1990. By 2004 there were fewer proportions of county residents at the lowest levels of education and more at the highest levels. The proportion of adults with bachelor’s degrees or higher in 2004 is 43.3 percent compared to 31.3 percent in 1990. Both statistics are significantly higher than corresponding California and national statistics.<sup>11</sup>

Although San Mateo County’s median family income statistic exceeds both the California and United States average, wealth is not distributed evenly throughout the County. Low-income Census Tracts are located near Daly City, Colma, and San Bruno. Higher income Census Tracts near Skyline are located near Hillsborough and San Mateo and across the county border in certain Census Tracts in San Francisco.<sup>12</sup>

Certain segments of the Skyline Service area represent psychographic profiles that are upscale with respect to style and trends. Other places in the college’s service area are retirement community-minded. Still others are marked by an interchange with the international market place. The college may wish to tailor learning experiences to these segments in ways that fit their lifestyle.<sup>13</sup>

Eight percent of the population of San Mateo County aged 16 to 64 report a disability. Skyline college will need to continue to provide appropriate assistance to students who enroll with disabilities.

### Employment

In the United States, it takes two incomes to provide the standard of living that one income provided 30 years ago.<sup>14</sup> Work time, family time, and traffic congestion all conspires to impact community college attendance by working-age adults.

An impending national labor shortage is predicted for the year 2010 when there will be 167.8 million available jobs in the U.S. economy but only 157.7 million workers to fill them. Most of these jobs will be in the service sector.<sup>15</sup>

Nearly 80 percent of all new jobs created to 2012 in the United States require an Associate's degree or less. The predominate mode of training employees is "on the job training," suggesting that community colleges need to partner closely with private employers to provide efficient training programs. In the main, 8 of 10 new jobs do not require a bachelor's degree.<sup>16</sup>

There are marked differences in the California workforce. Among working-age adults, about 52 percent of Hispanics/Latinos do not have a high school credential, compared to 8 percent of whites. At the other end of the spectrum, only 12 percent of working-age Hispanics/Latinos have a college degree, compared with 46 percent of working-age whites.<sup>17</sup>

If, as could occur, the average educational level of the California workforce declines, California's personal income per capita is projected to drop from \$22,728 in 2000 to \$20,252 in 2020—a decline of 11 percent or \$2,476 (in inflation-adjusted dollars), the largest drop in the nation. This projection reverses a trend that saw the state's per capita income grow by 30 percent from 1980 to 2000.<sup>18</sup>

The ways in which Americans work are shifting dramatically. Leading this shift is the nearly 38 million Americans in many diverse fields who create for a living, known as the "Creative Class." The rise of the Creative Class, now thought to number more than 30 percent of the total U.S. workforce, has and will continue to produce fundamental economic change.<sup>19</sup> In 2006, it is also more than likely that the jobs associated with the Creative Class may be outsourced to overseas destinations, thus impacting Skyline College's interface with the job pipeline.

Within a 5 mile radius of Skyline College's campus employment is dominated by service-oriented businesses (38.8% of all employers) and retail trade (21.0%). In a ten-mile radius, business sectors with the largest numbers of employees (greater than 5,000) include health services (38,830), education and libraries (24,242), eating and drinking establishments (17,908), manufacturing (15,715), wholesale trade (15,554), construction (13,469), transportation (12,730), and government (12,533), miscellaneous retail (9,673), food stores (8,994), motion pictures and amusements (8,072), real estate, holding and investments (7,226), furniture and home furnishing (6,350), automotive services (5,798), and banks, savings & lending institutions (5,393).<sup>20</sup>

In comparison with California, San Mateo County is home to a significantly higher proportion of managers and professionals (42.2 v 35.3%) and fewer blue collar workers (6.3 to 11.3%).<sup>21</sup>

Forty-two percent (n=148,003) of San Mateo County's work-age residents commute to jobs outside the county. Of this number, almost 72 thousand commute to San Francisco County; 55 thousand commute to Santa Clara County; and nearly 15 thousand commute to Alameda County.<sup>22</sup>

An almost identical number of workers commute to San Mateo County (n=147,283) as commute to work outside the County. Forty-three thousand commute from San Francisco County; 40 thousand commute to Santa Clara County; and 33 thousand commute to Alameda County.

The area surrounding Skyline College continues to develop as a center for high technology. The college plays a pivotal role in preparing workers for the biotechnology industry.

Recent hiring in Silicon Valley indicates the beginning of a rebound. A survey of CEO's of technology firms indicates that more than half (56%) expect hiring to be better in 2006 than in 2005 (37%).<sup>23</sup>

Oracle Corporation in Redwood City announced plans in mid-February, 2006, to eliminate 2,000 jobs or about 3.5 percent of its workforce.<sup>24</sup>

It is estimated that traffic congestion in the San Francisco-Oakland area resulted in 72 hours of extra travel time for peak period travel in 2003, up from 30 hours in 1982. The total annual cost of congestion is calculated at \$2.6 billion or \$631 per person.<sup>25</sup> The latter statistic is near the cost of tuition and fees to attend Skyline College.

### Housing

Median house prices in San Mateo County continue to increase. In 2000, the median price was \$469,200. By 2004 the median price was \$678,433, an increase of 44.6 percent over four years.<sup>26</sup> Signs are, however, that a slowdown in the housing market may be looming; Bay Area home sales plunged in January 2005 to the lowest level in five years.<sup>27</sup>

The median monthly rental price for a 2-bedroom apartment in San Mateo County is \$1,536. Observing the principle of not paying more than 30 percent of gross income for shelter, it would take \$61,440 annual income to afford this apartment.<sup>28</sup>

### Secondary Schools

At the national level, only 68 percent of ninth graders graduate from high school in four years, and only 18 percent complete an associate's degree within three years after entry into a community college or a bachelor's degree within six years of enrolling in a 4-year college. Baccalaureate degree attainment rates for Latino and African-American young adults—the fastest-growing population groups in our country—are less than half of those for white and Asian-Pacific Islanders.<sup>29</sup>

The number of first-time freshmen entering Skyline College from feeder high schools since 2000 has declined by 9.4 percent.<sup>30</sup>

El Camino High and South San Francisco High, the top two "feeder" high schools to Skyline College, obtained API (Academic Performance Index) scores of 735 and 711, respectively in

2004-2005. The statewide API performance target for all schools is 800. One feeder school in Skyline College's Mills High School in Millbrae exceeded this performance target. The average API for Skyline College's top 10 feeder high schools was 758.

Early college models in use by leading community colleges have shown great promise in increasing the number of low-income students who will access higher education. This model bears serious consideration by Skyline College and its partner secondary schools.<sup>31</sup>

### Technology and Learning

Incoming students to higher education are increasingly computer literate and carry expectations for colleges to enhance their access to new technology. Technology-based course delivery will require increased resources.

It is estimated that five million college students are now taking courses online.<sup>32</sup>

Almost 40% of schools offering face-to-face associate's degree programs also offer them online.<sup>33</sup>

Today's teenagers are unlike any previous generation in their exposure to technology: 100 percent use the internet to seek information, 94 percent use the internet for school research, 41 percent use email and Instant Messaging to contact teachers and schoolmates about school work, 81 percent email friends and relatives, 70 percent use Instant Messaging to keep in touch and 56 percent prefer the internet to the telephone.<sup>34</sup>

Also known as "Millennials," children born between 1982 and 2002, approach learning in new ways. Their preference is to learn: with technology, with each other, online, in their time, in their place, and by doing things that matter.<sup>35</sup>

The \$100 laptop computer now promised for developing countries will drive down further the cost of wireless educational networking in the United States. Florida is now considering a statewide purchase of these laptops for their community college students.

There is clear evidence of a digital divide based on education. Twenty-nine percent of American adults who have not graduated from high school have access to the Internet, compared with 61 percent of high school graduates and 89 of college graduates.<sup>36</sup>

The digital divide is also reinforced by age. Twenty-six percent of Americans aged 65 and older go online, compared with 67 percent of those of those aged 50-64, 80 percent of those aged 30-49, and 84 percent of those aged 18-29.<sup>37</sup>

Race is also influences the digital divide. Fifty-seven percent of African-Americans go online, compared with 70 percent of whites.<sup>38</sup>

### Higher Education and Public Policy

The Western and Southern states, which are experiencing rapid growth in their college-age populations, will have ballooning numbers of qualified students clamoring at the doors of two-year colleges for access to higher education. This has already happened in California.

Between 2004 and 2010, California is expected to see demand for higher education rise by more than 700,000 students--roughly comparable to total college enrollments in Illinois. Capacity questions for the state's community colleges, in particular, could worsen because of California State University's decision to cap enrollment, a first for the system.<sup>39</sup>

A recent report estimates that 1.5 million students who would probably have been awarded Pell Grants in 2003-04 did not apply for them, up from the estimated 850,000 who missed out on aid in 1999-2000. The number of low-income students who did not file for federal financial aid rose from 1.7 million to 1.8 million, or 28 percent of low-income students.<sup>40</sup> The potential for Skyline College to recruit students who may not realize that they can receive Pell Grants should not be overlooked as a way to increase enrollment, especially among minority groups.

Just over one-half (52 percent) of all undergraduates are independent students and represent roughly two-thirds of community college students (64 percent) and part-time students (67 percent) in American Higher Education. The needs of these students--who are considered by the federal government to be financially independent of their parents--frequently take a back seat to those of traditional undergraduates.<sup>41</sup>

Of the 20 million students enrolled at degree-granting colleges in 2015, one out of 10 now attends a for-profit college. That 10-percent market share is more than double the 4-percent figure of a decade ago.<sup>42</sup>

Abolishment of the federal 50-percent rule which heretofore has prevented any college that enrolls more than 50 percent of its students at a distance or provides more than half of its courses via distance education from participating in federal student-aid programs will spur a boom in online programs at traditional colleges, as well as the creation of for-profit businesses specializing in cybereducation.<sup>43</sup>

Nationwide, the numbers and percentages of community college transfers students are higher at higher at elite 4-year institutions than at their private counterparts. Overall, however, access for community-college transfers is quite limited at public institutions. Data suggest a median enrollment rate of community-college transfer students at elite public institutions of less than 4 percent.<sup>44</sup>

The Bush Administration recently has recommended a \$500 million cut in federal funds for vocational education in 2006-7, from \$1.3 billion to \$800 million. Excluded are \$105 million tech-prep education state grants, five million for tech prep demonstration funds and \$23 million for incarcerated youth education.<sup>45</sup> Lack of tech-prep funds, in particular, will disadvantage community college efforts to reach into secondary schools.

Evolving accreditation standards are aggressive in gearing colleges toward developing clear and measurable learning outcomes. In addition, the emergence of diverse student populations in age, goals, background, and economic status requires colleges to explore a variety of teaching modalities and hiring practices.

The Bush administration has appointed a commission that is considering standardized testing for college students. The testing would be meant to measure the quality of higher education in the United States.

### Community Colleges

The demand for higher education in California is projected to grow by more than 700,000 students in California in this decade. Three-fourths of this growth will occur in the state's community colleges.<sup>46</sup>

Enrollment by first-time freshmen aged 19 and younger is trending upward in California community colleges<sup>47</sup>

Nationwide, community colleges are meeting unprecedented demand for their services in the face of flattened traditional public financial support, forcing them to seek new revenue streams to maintain and expand programs.

Private donations to community colleges appear to be on the rise as more two-year institutions develop fund-raising programs. In the 2003-4 fiscal year, 100 public two-year institutions surveyed by the Council for Aid to Education raised \$122.4-million, up from the \$93.3-million raised by 86 community colleges surveyed the year before.<sup>48</sup>

It is estimated that California community colleges turned away some 175,000 students in 2003-4 during the state's fiscal crisis -- and resulting budget cuts and tuition increases. Community colleges experienced a 1.7-percent reduction in their state appropriations in 2003-4.<sup>49</sup>

California community colleges received a 12.4 budget percent increase in 2005-06 over the previous year, more than double the public appropriations to the University of California and California State University systems.<sup>50</sup>

There is a rising demand for a host of services that community colleges can provide. There is already unmet demand for instruction in English as a second language, and it will be further fueled by an expanding immigrant population, which has reached the highest proportion of the U.S. population in three-quarters of a century.

Within a 60-mile radius of San Bruno there are 59 postsecondary institutions at the two-year level or less. These include 28 public institutions, 11 not-for-profit schools, and 20 for-profit providers. Community colleges are by far enjoy the largest market share among these institutions by enrolling more than 300,000 students compared to nearly 13,000 for all other providers.<sup>51</sup>



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