Palm Beach State College
Environmental Scan

March 21, 2018
PBSC Growth Potential
Potential Opportunities for PBSC Growth

• Schedule enhancements
• Explore full weekend program
• Consider new programs of study
• FAU’s recent class-size limitations
• Expand existing in-demand programs of study

• Year-round Pell availability
• New bachelor’s degree programs
• International and out-of-state recruitment
• Strategic use of scholarship dollars
• Additional focus on veterans
Potential Limitations To PBSC Growth

• Many programs currently at enrollment capacity
• Aging facilities and inadequate parking capacity
• Scheduling issues – limited class/faculty availability
• Lower completion rates in distance learning courses, despite increases in enrollment for this delivery model
• Continued inconsistency in state funding levels
Points for Consideration
Points for Consideration

- PBSC district-wide enrollments have grown nearly 4% over the last decade.
- FTE enrollments are projected to increase more than 11% over the next five years.
- High school graduation counts are expected to increase more in Palm Beach County (7%) by 2022, than in the state (5%).
- More than 5% of PBSC employees are scheduled to retire in the next five years, with nearly another 28% eligible.
Points for Consideration

• The population of Palm Beach County is projected to grow 21% by 2035, slightly slower than the state rate of 26%, adding nearly 300,000 more residents to the County.

• This growth is being realized in the western sectors of the current north/south population corridor of the County.

• The County is expected to become increasingly diverse over the next two decades. The Hispanic and African-American population growth will fuel this continued increase in diversity.
Points for Consideration

• Many of the largest and/or fastest growing industries in the region do not require a four-year degree for entry (restaurant/hospitality, retail sales, entry-level administrative positions).

• There is a significant local industry sector which requires STEM related credentials, including aerospace and other technical occupations.

• A significant public sector employment base exists in the region, as well.

• The average annual wage in Palm Beach County has risen 43%, from $35,957 in 2001 to $51,372 in 2015. While the average wage in the County is below the national average, it remains above the state-wide average.
National Trends in Higher Education
Trends/Risks in Higher Education

• **Decreasing Revenues** – Enrollment is the primary driver of revenue, and with college enrollments flat or declining in recent years and high school graduate counts falling through 2024, diminished revenue puts many institutions at financial risk.

• **ROI** – The value of a college degree is questioned when the cost of a degree outpaces subsequent growth in income, and colleges are asked to establish a greater return on investment model and rhetoric.

• **Accountability** – The public is insisting on greater transparency about student outcomes and program performance.

• **New delivery models** – Accelerated degrees, industry accreditation, and low cost degrees (achieved by accepting dual enrollment credits in high school) are opening the post-secondary educational marketplace to a wider range of learners.
Trends/Risks in Higher Education

• **Personalization** – Student-centered, active learning is emphasized, along with a rejection of the “one size fits all” approach to education. Personalization strategies include accommodations for instruction, class time/day offerings, and delivery modes, along with a “high-touch” philosophy for student services.

• **Micro-learning** – Delivering content to learners in small, specific bursts over time or just when needed enables students to progress at their own pace. Modules designed for mobile devices also allow students to learn and access content at a time and place most convenient for them.

• **High-velocity learning** – Active problem-solving experiences such as games, simulations, and role playing can be more effective teaching strategies for today’s learners, speeding up the learning process in lieu of long lectures.
Trends/Risks in Higher Education

• **Shifting Demographics** – Public flagship institutions are growing out-of-state share of entering freshman classes. Therefore, regional public colleges and universities pick up more of the in-state students who have fewer choices.

• **Non-traditional Enrollment Growth** – Enrollments by older students are projected to grow twice as fast as those of traditional students from 2012-2022. This group is more concerned about money/cost of college, so financial aid leveraging is critical.

• **Student Engagement Shift** – Non-traditional students are more disengaged from their school and peers, which presents a number of challenges for college leaders, as well as student service and support personnel.

• **Differing Learning Models and Media** – Non-traditional students are more open to digital learning options, and prefer other adaptive/collaborative learning settings. Flexibility is key to the other time demands and obligations they face.
Trends/Risks in Higher Education

- **Disruptive Providers** – Continued growth of new, “disruptive” providers, challenging traditional degree credentialing, and focusing on outcomes such as job placements, advancement, and salaries.

- **Competency-Based Education Models** – These models, along with data driven outcomes assessment, and progress tracking are growing in popularity.

- **Re-packaging Options** – Institutions are redesigning existing traditional course clusters for delivery to non-traditional age students as professional development options.

- **New Accreditation Criteria** – Accreditation entities and the federal government are exploring new criteria and evaluation options.
Internal Data Trends
District Wide Enrollment Trends

- The 2015-16 District enrollment (47,893) represents a 3.8% increase since 2005-06.
• The Fall 2017 headcount (30,639) represents a 2.2% increase since Fall 2014.
Enrollment Trends by Campus

• In 2015-16, nearly half of all PBSC students were enrolled on the Lake Worth Campus, while Boca Raton and Palm Beach enrolled 23% each. Six percent were enrolled at Belle Glade.
Fall Headcounts by Campus: Credit and Prep

- Lake Worth: 16758
- PB Gardens: 8909
- Boca Raton: 8594
- Belle Glade: 1532
- Lox Groves: 1990

Colors:
- 2014
- 2015
- 2016
- 2017
Enrollment by County of Origin

District
- Palm Beach: 85.3%
- Broward: 9.3%
- Martin: 0.7%
- Hendry: 0.6%
- Miami-Dade: 0.5%
- Other Florida: 1.2%
- Out of state: 0.5%

Palm Beach Gardens
- Palm Beach: 52.4%
- Broward: 3.1%
- Martin: 1.3%
- Saint Lucie: 1.2%
- Other Florida: 2.7%
- Out of state: 0.4%

Lake Worth
- Palm Beach: 50.8%
- Broward: 5.1%
- Martin: 0.7%
- Miami-Dade: 0.5%
- Hendry: 1.2%
- Other Florida: 1.5%
- Out of state: 0.8%

Belle Glade on-campus/distance learning
- Palm Beach: 89.7%
- Broward: 7.2%
- Martin: 0.8%
- Hendry: 6.4%
- Miami-Dade: 0.5%
- Other Florida: 1.3%
- Other: 0.5%
- Out of state: 0.2%

Belle Glade off-campus
- Palm Beach: 95.3%
- Broward: 2.3%
- Hendry: 0.5%
- Miami-Dade: 0.6%
- Other Florida: 0.4%
- Other: 0.4%
- Out of state: 0.5%

Boca Raton
- Palm Beach: 72.8%
- Broward: 23.6%
- Other Florida: 2.3%
- Other: 2.3%
- Out of state: 0.7%
Fall 2017 Enrollment by Age

Average Age = 23.8

- Under 18: 9%
- 18-20: 38%
- 21-24: 24%
- 25-29: 13%
- 30-34: 6%
- 35-44: 6%
- 45+: 4%

2016
- Under 18: 8%
- 18-20: 39%
- Avg Age is 23.9
Enrollment Trends by Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Fall 2015</th>
<th>Fall 2016</th>
<th>Fall 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time</td>
<td>28%</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>Part-time</td>
<td>72%</td>
<td>74%</td>
<td>74%</td>
</tr>
</tbody>
</table>

Over the past three years FY14 to FY17, the ratio of full-time (26%) to part-time (74%) students has remained largely constant.
2017 Daytime vs. Evening Enrollment

Day only, 47%
Combination, 26%
Weekend only, 1%
Evening only, 16%
Online Only, 9%

2016
Day – 48%
Eve – 17%
Distance Learning Trends

- Distance learning FTE grew 55% at PBSC between 2012 and 2017.
Degrees & Certificates Awarded – 2016-17

- Associate of Arts: 3,643, 51%
- Associate of Science/Applies Science: 2,465, 34%
- Certificate: 702, 10%
- Bachelor's: 372, 5%

n=7,182
Limited Access Program Demand & Availability

Limited Access Program Demand and Availability - Fall 2017*

- SONOGRAPHY
- RESPIRATORY CARE
- RADIOGRAPHY
- DENTAL ASSISTING
- DENTAL HYGIENE
- SURGICAL TECHNOLOGY
- FIREFIGHTER
- MEDICAL ASSISTING
- EMT
- PARAMEDIC
- NURSING

# OF ACCEPTED STUDENTS/OAVALIBLE SEATS  # OF QUALIFIED APPLICANTS

* Data for Surgical Technology from Summer 2017; Data for Radiography from Spring 2017
# Non-Enrolled Applicant Destination

<table>
<thead>
<tr>
<th>Institution</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did Not Attend Another Institution</td>
<td>4,643</td>
</tr>
<tr>
<td>Florida Atlantic University</td>
<td>226</td>
</tr>
<tr>
<td>Indian River State College</td>
<td>98</td>
</tr>
<tr>
<td>Miami Dade College</td>
<td>53</td>
</tr>
<tr>
<td>Valencia College</td>
<td>44</td>
</tr>
<tr>
<td>Daytona College</td>
<td>42</td>
</tr>
<tr>
<td>Florida Southwestern State College</td>
<td>29</td>
</tr>
<tr>
<td>Santa Fe College</td>
<td>27</td>
</tr>
<tr>
<td>Tallahassee Community College</td>
<td>26</td>
</tr>
<tr>
<td>University of Central Florida</td>
<td>25</td>
</tr>
<tr>
<td>Florida International University</td>
<td>24</td>
</tr>
<tr>
<td>Palm Beach Atlantic University</td>
<td>23</td>
</tr>
<tr>
<td>Florida Career College – WPB</td>
<td>23</td>
</tr>
<tr>
<td>Nova Southeastern University</td>
<td>22</td>
</tr>
<tr>
<td>Hillsborough Community College</td>
<td>20</td>
</tr>
</tbody>
</table>

*Source: National Student Clearinghouse*
Palm Beach State College initiated robust efforts to increase enrollment and completions. Because of our concerted efforts and hyper-focus on student advisement and engagement, case management and educational planning in coordination with academic programs and scheduling efforts, we expect an increase in FTE. While we do not expect to see the growth in FTE that the State projects, we do expect to see a modest increase of approximately 2%. We accept the Division Projections with adjustments.

<table>
<thead>
<tr>
<th>FY</th>
<th>Planned FTE</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>21,176</td>
<td>2.14%</td>
</tr>
<tr>
<td>2019</td>
<td>21,636</td>
<td>2.17%</td>
</tr>
<tr>
<td>2020</td>
<td>22,100</td>
<td>2.14%</td>
</tr>
<tr>
<td>2021</td>
<td>22,587</td>
<td>2.20%</td>
</tr>
<tr>
<td>2022</td>
<td>23,064</td>
<td>2.11%</td>
</tr>
<tr>
<td>2023</td>
<td>23,539</td>
<td>2.06%</td>
</tr>
<tr>
<td><strong>Change from 2018-2023</strong></td>
<td><strong>2,363</strong></td>
<td><strong>11.2%</strong></td>
</tr>
</tbody>
</table>
PBSC employed 1,228 full-time employees, in Fall 2017.
Over the next five years, 68 employees are scheduled to retire – 5.5% of the total.
Additionally, 343 others are eligible to retire due to age and/or service time – 27.9% of the total. These employees could choose to retire at any time.
This potential loss of one-third of full-time staff in the near future represents both a challenge and an opportunity for the College.
Great Colleges to Work for Survey

• On the 2016 survey, 10 of the 15 categories reported were identified as areas warranting attention by the college, as shown below:
  - Teaching Environment
  - Policies, Resources and Efficiency
  - Shared Governance
  - Senior Leadership
  - Compensation, Benefits, & Work/Life Balance
  - Faculty, Administration and Staff Relations
  - Communication
  - Collaboration
  - Fairness
  - Respect and Appreciation

• PBSC’s average score was 55%, as compared to an average of 77% for Honor Roll institutions.
External Data Trends
Palm Beach County
2016 Palm Beach County Population by Age

<table>
<thead>
<tr>
<th>Age Cohort</th>
<th>2016 Population</th>
<th>2016 Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 20 years</td>
<td>310,734</td>
<td>21.5%</td>
</tr>
<tr>
<td>20 to 39 years</td>
<td>332,662</td>
<td>23.0%</td>
</tr>
<tr>
<td>40 to 59 years</td>
<td>375,294</td>
<td>26.0%</td>
</tr>
<tr>
<td>60 to 79 years</td>
<td>314,816</td>
<td>21.8%</td>
</tr>
<tr>
<td>80 years and over</td>
<td>110,310</td>
<td>7.6%</td>
</tr>
</tbody>
</table>
### 2016 Palm Beach County Population by Race

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>2016 Population</th>
<th>2016 Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Other Race/ethnicities</td>
<td>51,925</td>
<td>3.6%</td>
</tr>
<tr>
<td>Asian, Non-Hispanic</td>
<td>39,010</td>
<td>2.7%</td>
</tr>
<tr>
<td>Black, Non-Hispanic</td>
<td>264,346</td>
<td>18.3%</td>
</tr>
<tr>
<td>White, Hispanic</td>
<td>280,116</td>
<td>19.4%</td>
</tr>
<tr>
<td>White, Non-Hispanic</td>
<td>808,419</td>
<td>56.0%</td>
</tr>
</tbody>
</table>
### 2016 Palm Beach County Educational Attainment

<table>
<thead>
<tr>
<th>Education Level</th>
<th>2016 Population</th>
<th>2016 Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less Than 9th Grade</td>
<td>72,811</td>
<td>6.9%</td>
</tr>
<tr>
<td>9th Grade to 12th Grade</td>
<td>64,900</td>
<td>6.2%</td>
</tr>
<tr>
<td>High School Diploma</td>
<td>267,201</td>
<td>25.3%</td>
</tr>
<tr>
<td>Some College</td>
<td>212,364</td>
<td>20.1%</td>
</tr>
<tr>
<td>Associate's Degree</td>
<td>90,012</td>
<td>8.5%</td>
</tr>
<tr>
<td>Bachelor's Degree</td>
<td>216,242</td>
<td>20.5%</td>
</tr>
<tr>
<td>Graduate Degree and Higher</td>
<td>130,627</td>
<td>12.4%</td>
</tr>
</tbody>
</table>
Palm Beach County Population Projections through 2045

• Palm Beach County is projected to grow at a lower rate than the state in every age category through 2035.

### PALM BEACH COUNTY

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2016</th>
<th>2035</th>
<th># change</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>272,819</td>
<td>320,111</td>
<td>47,292</td>
<td>17%</td>
</tr>
<tr>
<td>18-24</td>
<td>111,209</td>
<td>122,854</td>
<td>11,645</td>
<td>10%</td>
</tr>
<tr>
<td>25-54</td>
<td>502,095</td>
<td>580,202</td>
<td>78,107</td>
<td>16%</td>
</tr>
<tr>
<td>55 and over</td>
<td>505,618</td>
<td>656,531</td>
<td>150,913</td>
<td>30%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,391,741</strong></td>
<td><strong>1,679,698</strong></td>
<td><strong>287,957</strong></td>
<td><strong>21%</strong></td>
</tr>
</tbody>
</table>

### FLORIDA

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2016</th>
<th>2035</th>
<th># change</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>4,125,176</td>
<td>5,019,912</td>
<td>894,736</td>
<td>22%</td>
</tr>
<tr>
<td>18-24</td>
<td>1,814,766</td>
<td>2,066,370</td>
<td>251,604</td>
<td>14%</td>
</tr>
<tr>
<td>25-54</td>
<td>7,649,983</td>
<td>9,161,066</td>
<td>1,511,083</td>
<td>20%</td>
</tr>
<tr>
<td>55 and over</td>
<td>6,558,729</td>
<td>9,150,006</td>
<td>2,591,277</td>
<td>40%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>20,148,654</strong></td>
<td><strong>25,397,354</strong></td>
<td><strong>5,248,700</strong></td>
<td><strong>26%</strong></td>
</tr>
</tbody>
</table>

Palm Beach County is projected to become increasingly diverse through 2035. The Hispanic population is projected to grow by more than 50%, while the non-Hispanic black population will increase 36%. In contrast, the non-Hispanic white population will remain relatively flat (3% anticipated growth).

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2035</th>
<th># change</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Hispanic White</td>
<td>805,213</td>
<td>828,824</td>
<td>23,611</td>
<td>3%</td>
</tr>
<tr>
<td>Non-Hispanic Black</td>
<td>247,939</td>
<td>337,118</td>
<td>89,179</td>
<td>36%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>298,683</td>
<td>459,883</td>
<td>161,200</td>
<td>54%</td>
</tr>
<tr>
<td>Total All Races</td>
<td>1,391,741</td>
<td>1,679,698</td>
<td>287,957</td>
<td>21%</td>
</tr>
</tbody>
</table>

High School Graduation Projections

- National projection for public high school graduation rate in 2023-2024 is only 1% higher than it was in 2011-2012.
- Florida projection for public high school graduation in 2023-2024 is 5% higher than it was in 2011-2012.
- Palm Beach State College’s market share of the School District of Palm Beach County was 37% in the most current reporting period, up from 32% in 2012.

Source: FL DOE HS Graduation Projections (2016).

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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>PBC projected</td>
<td>12,221</td>
<td>12,889</td>
<td>13,000</td>
<td>12,556</td>
<td>12,931</td>
<td>13,089</td>
<td>868</td>
<td>7%</td>
</tr>
<tr>
<td>graduations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FL projected</td>
<td>167,288</td>
<td>172,081</td>
<td>147,611</td>
<td>171,341</td>
<td>173,468</td>
<td>176,469</td>
<td>9,181</td>
<td>5%</td>
</tr>
<tr>
<td>graduations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: FL DOE HS Graduation Projections (2016).
Educational Attainment Projections

![Bar chart showing educational attainment projections for 2017 and 2026 populations.](chart.png)
Economic Overview

- Palm Beach County’s 1.4 million residents comprised 7% of the state’s population in 2016. The county evidenced 8.1% growth over the previous five years, as compared to 7.9% growth state-wide.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (2016)</td>
<td>1,443.8K</td>
</tr>
<tr>
<td>Jobs (2016)</td>
<td>655.0K</td>
</tr>
<tr>
<td>Average Earnings (2016)</td>
<td>$58.6K</td>
</tr>
<tr>
<td>Unemployed (1/2017)</td>
<td>33.2K</td>
</tr>
<tr>
<td>Completions (2016)</td>
<td>19.3K</td>
</tr>
<tr>
<td>GRP (2016)</td>
<td>$74.4B</td>
</tr>
<tr>
<td>Exports (2016)</td>
<td>$63.0B</td>
</tr>
<tr>
<td>Imports (2016)</td>
<td>$87.7B</td>
</tr>
</tbody>
</table>
Regional Job Trends

<table>
<thead>
<tr>
<th>Region</th>
<th>2012 Jobs</th>
<th>2016 Jobs</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region</td>
<td>568,984</td>
<td>654,963</td>
<td>85,979</td>
<td>15.1%</td>
</tr>
<tr>
<td>State</td>
<td>8,205,807</td>
<td>9,236,379</td>
<td>1,030,572</td>
<td>12.6%</td>
</tr>
<tr>
<td>Nation</td>
<td>148,432,367</td>
<td>158,516,931</td>
<td>10,084,564</td>
<td>6.8%</td>
</tr>
</tbody>
</table>
Largest Industries

2017 Jobs

- Full-Service Restaurants
- Local Government, Exclusive of Education and Hospitals
- Elementary and Secondary Schools
- General Medical and Surgical Hospitals
- Limited-Service Restaurants
- Supermarkets and Other Grocery Stores
- Offices of Physicians (except Mental Health Specialists)
- Temporary Help Services
- Hotels (except Casino Hotels)
- Corporate, Subsidiary, and OtherOffices

2016 Earnings Per Worker

- Full-Service Restaurants
- Local Government, Exclusive of Education and Hospitals
- Elementary and Secondary Schools
- General Medical and Surgical Hospitals
- Limited-Service Restaurants
- Supermarkets and Other Grocery Stores
- Offices of Physicians (except Mental Health Specialists)
- Temporary Help Services
- Hotels (except Casino Hotels)
- Corporate, Subsidiary, and OtherOffices
Highest Paying Industries

2016 Earnings Per Worker

Support Activities for Oil and Gas
Coal and Other Mineral and Limestone Mining
Open-End Investment Funds
Investment Banking and Securities
Commodity Contracts Brokers
Electric Bulk Power Transmission
Securities Brokerage
Electric Power Distribution
Miscellaneous Financial Investments
Portfolio Management

2017 Jobs
Fastest Growing Industries

![Chart showing the fastest growing industries from 2017 to 2026.](chart.png)
Fastest Growing Occupations

- Retail Salespersons (H1-2031)
- Registered Nurses (H9-1141)
- Combined Food Preparation and Service Workers (H5-0063)
- Customer Service Representatives (H4-3061)
- Cooks, Restaurant (D5-2014)
- Nursing Assistants (O1-1054)
- Waiters and Waitresses (O3-3055)
- Cashiers (H1-2011)
- Home Health Aides (O1-1031)
- Lawyers (H3-1011)
### Growing and Declining Occupations

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Change in Jobs (2012-2016)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combined Food Preparation and Serving Workers, Including Fast Food</td>
<td>3,222</td>
</tr>
<tr>
<td>Retail Salespersons</td>
<td>2,689</td>
</tr>
<tr>
<td>Secretaries and Administrative Assistants, Except Legal, Medical, and Executive</td>
<td>2,336</td>
</tr>
<tr>
<td>Door-to-Door Sales Workers, News and Street Vendors, and Related Workers</td>
<td>-80</td>
</tr>
<tr>
<td>Securities, Commodities, and Financial Services Sales Agents</td>
<td>-109</td>
</tr>
<tr>
<td>Tellers</td>
<td>-224</td>
</tr>
</tbody>
</table>
Palm Beach County Annual Average Wage 2001-2015

Annual Wage Comparison 2001-2015

PBC Price Level Index 1998-2015

Source: Bureau of Economic and Business Research, 2017.
Dr. Ray Thompson
Vice President, Higher Education Services
239.482.7095
rthompson@mgtconsulting.com
www.mgtconsulting.com