

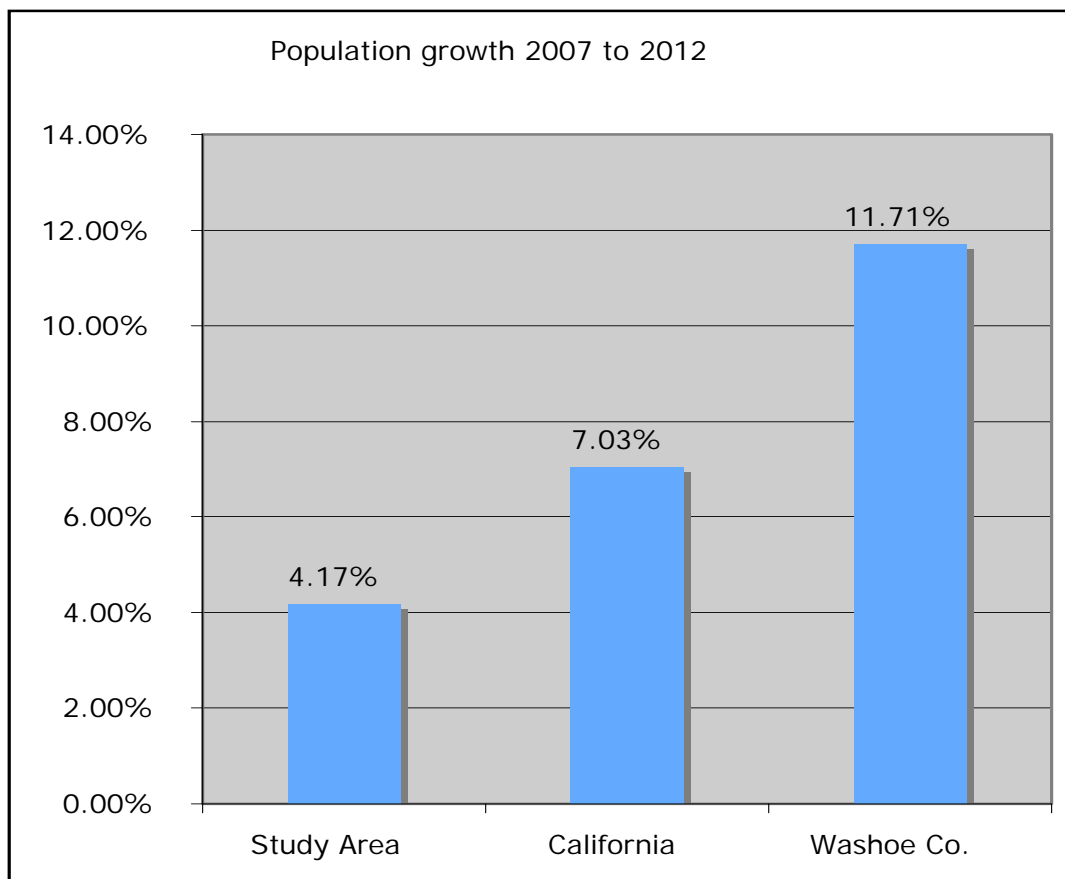
Environmental Scan Summary

Board Retreat 7.23.08 Presentation

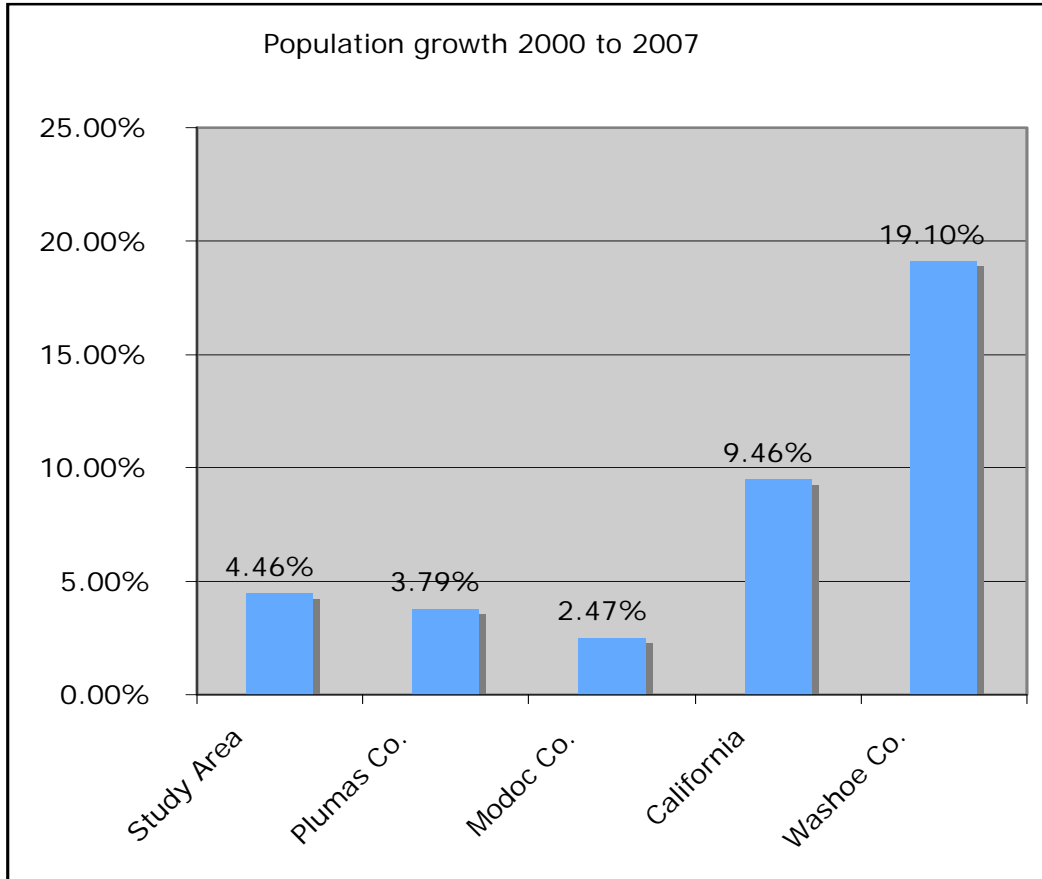
This environmental scan was completed in the late spring of 2008 utilizing the most recent North American Industrial Classification System industry codes, employee sizes, sales levels, etc. In addition the scan utilized a conversion tool between the taxonomy of programs (TOP codes) and the Standard Occupations (SOC job codes. Population counts were pulled from U.S. Census data and California Community College data was pulled from the CCC MIS data set. The scan was prepared by Madrid Consulting Group LLC. The study area for this project is comprised of a set of postal zip codes located within a 30-mile radius from the Lassen College Campus. The study area was selected because nearly 90% of the fall 2006 student body lived within its borders . The communities included Susanville, Janesville, Herlong, Doyle, Alturas City, Chester, Westwood, Lake Almanor Country Club CDP, Cedarville, Wendel, Termo, Standish, Ravendale, Milford, and Litchfield.

SUMMARY STATEMENT #1:

The combined study area in 2007 included 47,517 people and 15,267 households. The population growth by 2012 was estimated to grow to 49,456, a 4.17% increase. In this same 2007-12 time frame the state growth rate was expected to increase by 7.03% while Washoe County in Nevada was expected to grow by 11.71%.



The historical population growth between 2000 and 2007 had been 4.46% for the study area while the state grew by 9.46% and Washoe County grew by 19.1%. The population growth rate for Modoc county was 2.47% and Plumas County was 3.79%.



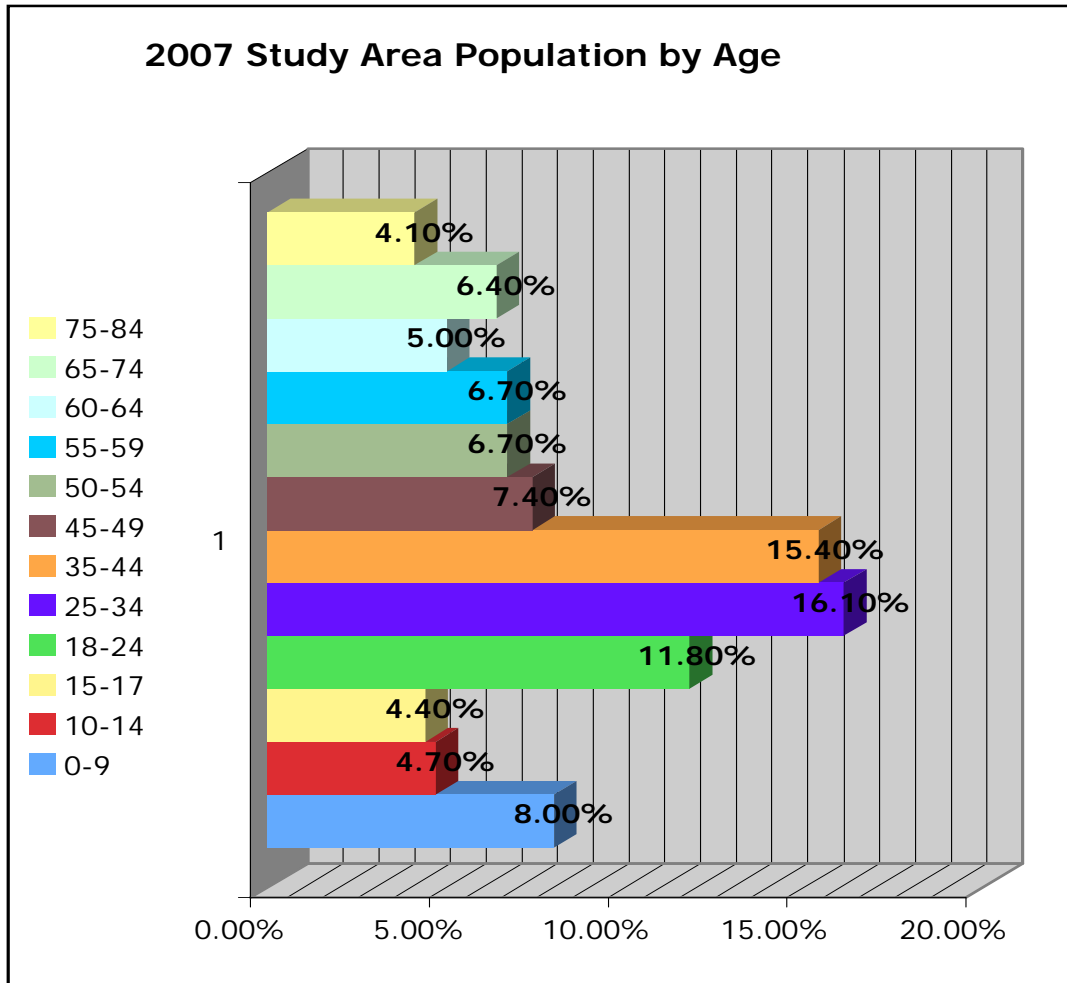
Conclusion: The primary service area of Lassen Community College is growing at a slower pace than the state of California and the neighboring Nevada Washoe county. The Lassen County population growth rate is nearly double the Modoc county rate and about 15% higher than the Plumas county rate.

Source: Scan Exhibit B-1, B-3

SUMMARY STATEMENT #2:

According to the LCC fact book the average age of an LCC student in the spring of 2008 was 34.2 years old. In 2007 of the 47,517 people living in the study area 4.4% (2108) of the population is between 15-17, traditional high school age. In 2012 this same traditional age population is expected to be 2020, almost the same size as in 2007, representing 4.1% of the population in 2012.

The total 2006-07 enrollment of high school age students in Big Valley High, Lassen High, Diamond Mountain High, Westwood High, Modoc High and Herlong High is currently under 1800 students. In Lassen County in 2006 there were 404 high school graduates. According to the California Department of Finance Demographics each year between 2006 and 2016 the number of high school graduates will decline below the previous years total even though the total 15-17 age population will remain about the same in number.



The traditional college age population in the study area between 18-24 represented 11.8% of the study area population. The 25-34 age range represented 16.1% and the 35-44 age

range represented 15.4% while the 45-49 age range represented 7.4%. When a person was 50+ they represented 28.9% of the study area population.

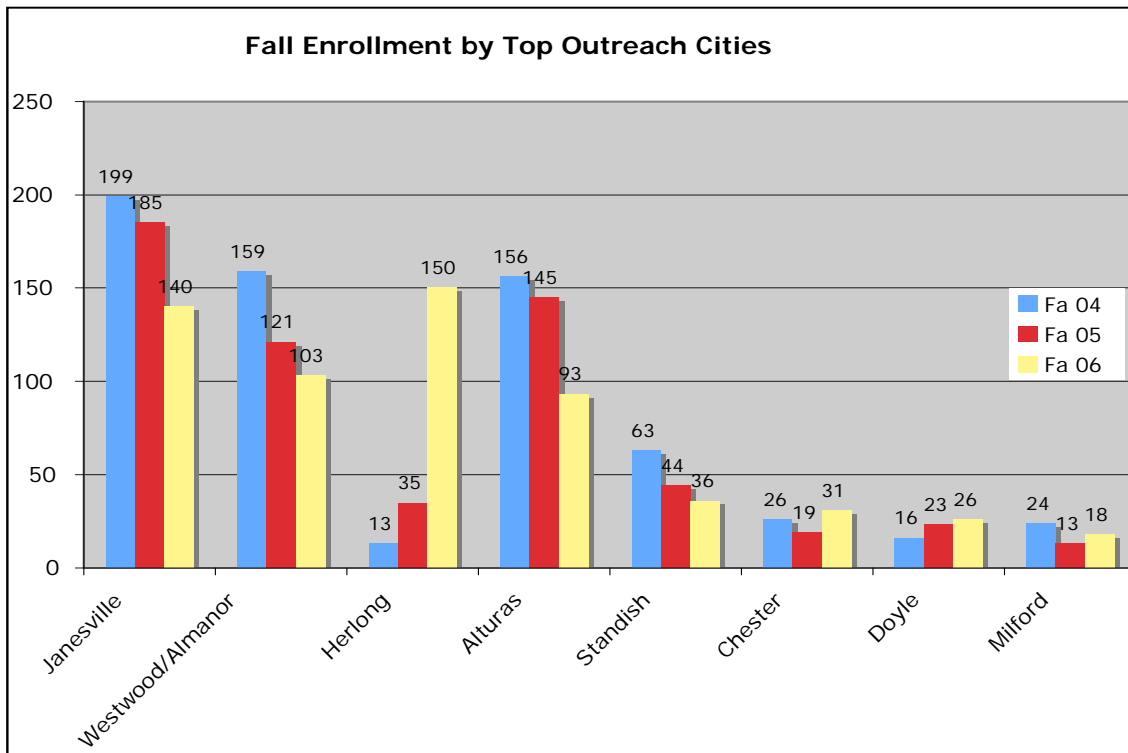
Of those students attending a community college in the fall of 2006 with a self-reported address in the environmental scan study area, Lassen College enrolled 83% of them according to the Chancellor’s MIS data.

Conclusion: The traditional age high school graduates supporting Lassen College enrollment will be declining over the next decade. Enrollment strategies must be developed to meet the educational needs of all age ranges to grow Lassen College enrollment. Course offerings using alternative distance education modes must be utilized to serve students outside of the primary market area. Niche market enrollment needs should be identified and targeted marketing strategies used to maximize enrollment.

Source: Scan Exhibit E-5, B-6, B-7, C-1

SUMMARY STATEMENT #3:

Enrollment trends in the study area by zip code using data from the Chancellors office MIS department shows some areas with growth and some with decreases. Overall the fall headcount enrollment declined by 239 students, a 12.5% decrease from fall 2004 to fall 2006.



All cities in the environmental scan area—Fall enrollment only.

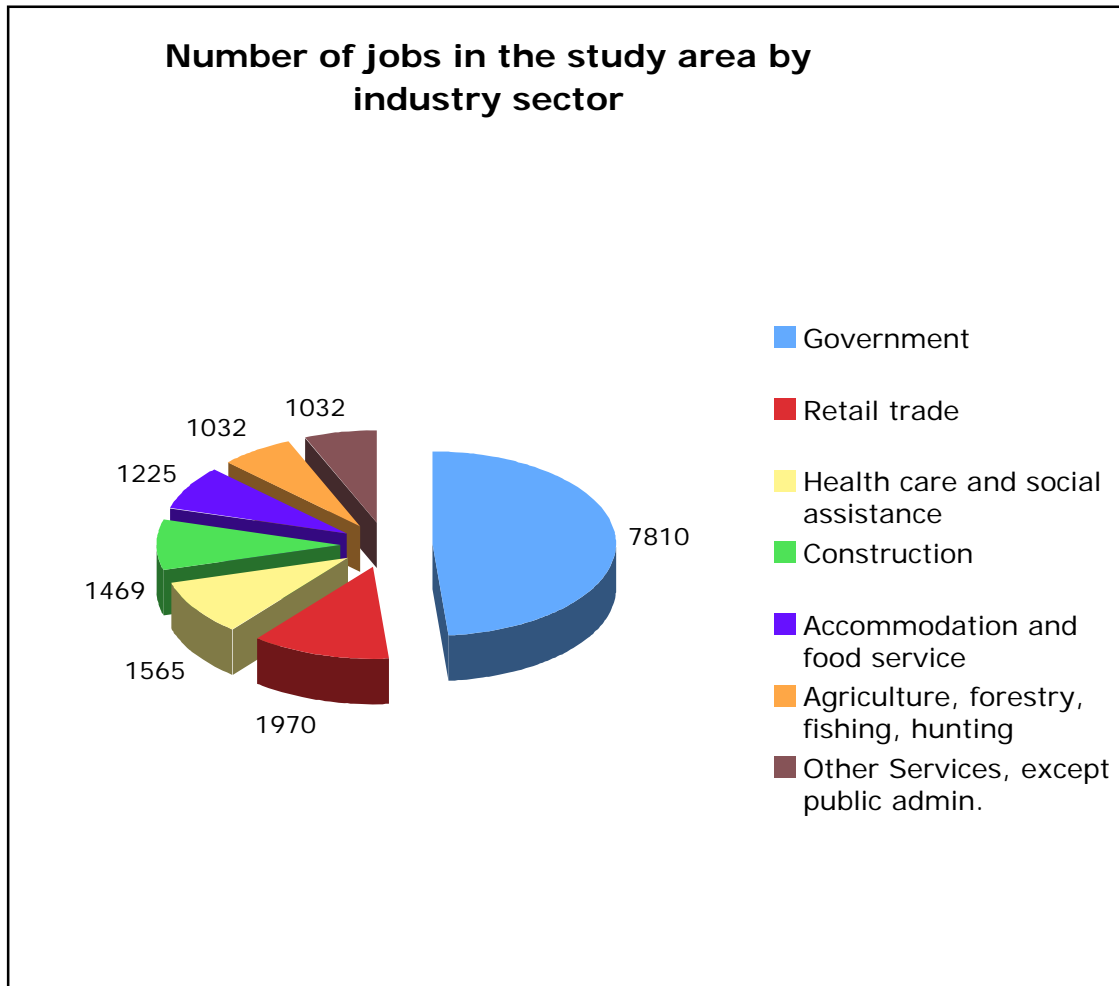
<u>Zip</u>	<u>Location</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>
96113	Herlong	13	35	150
96020	Chester	26	19	31
96121	Milford	24	13	18
96109	Doyle	16	23	26
96104	Cedarville	18	12	11
96130	Susanville	1204	1170	1044
96137	Westwood/Almanor	159	121	103
96128	Standish	63	44	36
96114	Janesville	199	185	140
96117	Litchfield	20	14	10
96101	Alturas	156	145	93
96123	Ravendale	0	5	2
96136	Wendel	9	8	3
96056	McArthur	6	19	6
96132	Termo	0	0	1
Totals		1913	1813	1674
CCC Capture Percentage		83%	84.5%	83%

Conclusion: The decline in enrollment during the 2004-2006 fall terms seems to have impacted certain areas harder than others.

Source: Scan Exhibit C-4

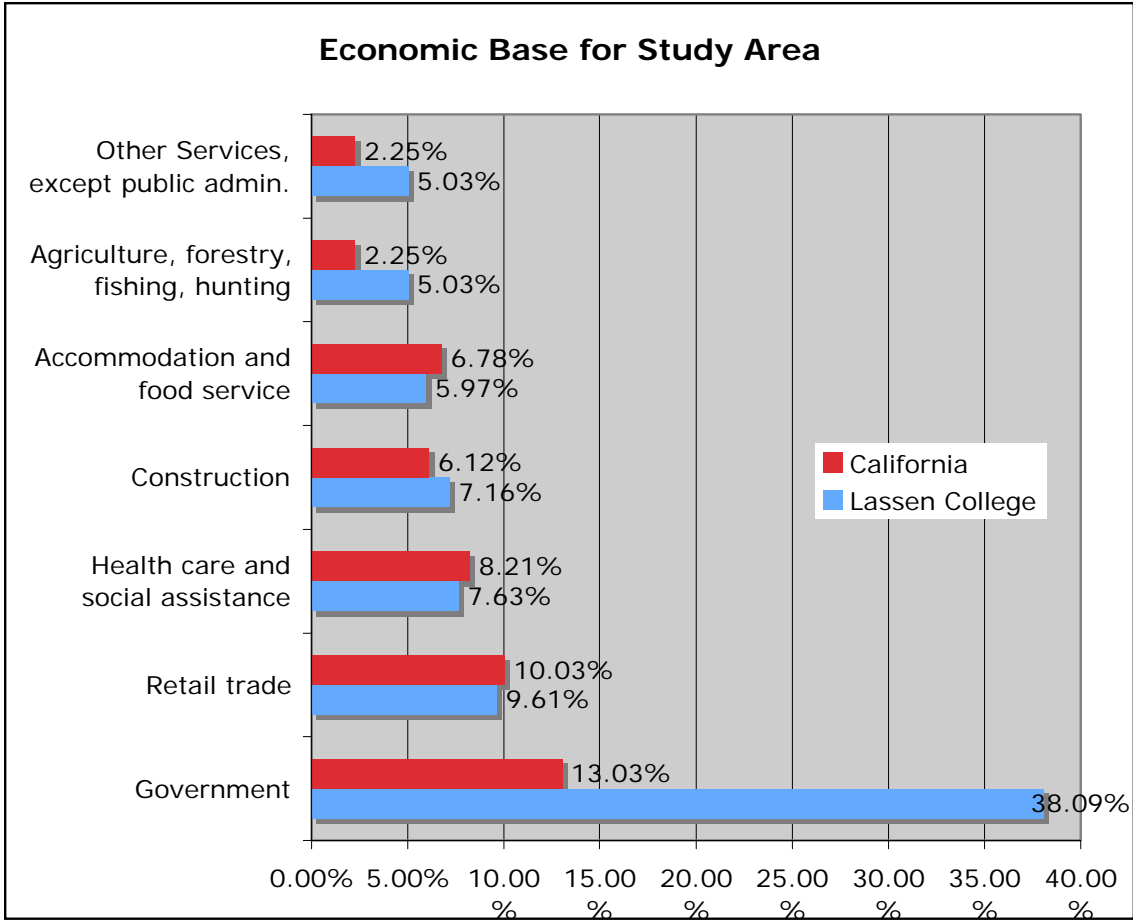
SUMMARY STATEMENT #4:

The economic base of the study area in jobs is driven by seven NAICS industry sectors;



Code	Industry description	# jobs	% jobs	% of CA jobs
90	Government	7810	38.09%	13.03%
44-45	Retail trade	1970	9.61%	10.03%
62	Health care and social assistance	1565	7.63%	8.21%
23	Construction	1469	7.16%	6.12%
72	Accommodation and food service	1225	5.97%	6.78%
11	Agriculture, forestry, fishing, hunting	1032	5.03%	2.25%
81	Other Services, except public admin.	<u>1032</u>	<u>5.03%</u>	<u>2.25%</u>
		16,103	78.52%	48.67%

- The total jobs in the study area was 20,503.



The worker distribution in the study area 16 years old and higher is as follows:

For Profit	43.6%
Non-Profit	4.8%
Self Employed	11.7%
Government	39.1%
Local	13.7%
State	18.6%
Federal	6.8%

Conclusion: The economic base of the study area where approximately 90% of Lassen College students come from is largely driven by Government sector jobs, local retail, health care, construction, accommodations/food service, agriculture and outdoor recreation.

Source: D-5, H-8

SUMMARY STATEMENT #5:

When looking for possible jobs for college graduates in Lassen County, Plumas County, Modoc County and Washoe County, Nevada the following 12 TOP codes emerged as the highest demand codes between 2008 and 2012 (the list is ranked by the number of annual job openings in the TOP code area):

The TOP codes are listed in order of the annual job increases between 2008 and 2012:

Real Estate	2350
Construction crafts technology	1090
Office technology/office computer	649
Management development/supervision	218
Business and commerce, general	217
Certified Nurse Assistant	158
Corrections	151
Automotive Technology	133
Administration of Justice	100
Machining and machine tools	86
Human Services	79
Small business and entrepreneurship	79

SUMMARY STATEMENT #6:

The fastest growing industries and the fastest growing occupations between 2007 and 2012 in the four county area of Lassen County, Plumas County, Modoc County and Washoe County, Nevada are listed in two separate lists.

The 15 fastest growing industries (NAICS coded) listed in order of the number of job changes between 2008 and 2012 are:

Local Government	1828
Employment Services	1714
Activities related to real estate	1330
Offices of real estate brokers and agents	1281
Building foundation and exterior contractors	1164
Services to buildings and dwellings	1062
Lessors of real estate	936
Individual and family services	786
Other general merchandise stores	753
Limited-service eating places	688
Other specialty trade contractors	638
Warehouse and storage	554
Full Service Restaurants	545
Building equipment contractors	545
Residential building construction	524

The 15 fastest growing occupations (SOC codes) requiring an AA degree or less listed in order of the forecast growth in the number of jobs between 2008 and 2012 are:

Real estate agents	1070
Real estate brokers	1045
Carpenters	1003
Retail Salespersons	803
Landscape and groundskeepers	577
Laborers and freight, stock and material movers	576
Office clerks, general	568
Janitors, cleaners, except maids/housekeepers	557
Customer service representatives	556
Bookkeeping, accounting and auditing clerks	554
Truck Drivers, heavy and tractor-trailer	547
Construction laborers	499
Combined food preparation/serving(inc fast food)	487
Executive secretaries and admin assistants	404
Registered Nurses	380