



External Environmental Scan for
FGCU's Strategic Planning Process
for 2010 to 2015

November 16, 2009

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Preface

An external environmental analysis is always a challenge since its goal is to provide a summary of many important factors along with potential opportunities and threats. The global economy is just beginning to recover from one of the worst recessions since the great depression of the 1930s and the recovery will be very gradual over the next several years. The state has seen its revenues fall dramatically requiring tight budgets. The demand for higher education has increased during the recession but the number of institutions offering bachelor's degrees in the region has increased, as well with many offering online degree programs. The strategic planning process is a key part of the university's efforts to meet and exceed the goals and objectives that are addressed in the 2009-2010 legislative budget request by the Florida State University System including:

- Access to and production of degrees;
- Meeting statewide professional and workforce needs;
- Building world-class academic programs and research capacity; and
- Meeting community needs and fulfilling unique institutional missions.

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Table of Contents

Preface	2
Executive Summary.....	5
Economic Outlook.....	10
Figure 1: National Real GDP Growth.....	12
Figure 2: National Unemployment Rate	13
Figure 3: State of Florida Economic Projections	14
Table 1: State of Florida Economic Outlook	15
Figure 4: Historical Coastal County Unemployment Rates	16
Figure 5: Historical Inland County Unemployment Rates.....	16
Occupations and Industry Trends	19
Table 2: Top 25 Lee County Occupations for 2008	20
Table 3: Florida's Top 25 High Growth Occupations Requiring a Bachelor's Degree, 2008 and 2016 ...	21
Table 4: Florida's Top 25 High Growth Occupations Requiring a Master's or higher Degree, 2008 and 2016	22
Regional Economic Development and Workforce Studies	23
Population and Demographics.....	26
Figure 6: Southwest Florida Population Projections by Age Group.....	27
Figure 7: Southwest Florida 18-19 Year Old Population Projections.....	28
Figure 8: Florida Population Projections by Age Group.....	29
Figure 9: Florida 18-19 Year Old Population Projections.....	30
Figure 10: Southwest Florida 18-19 Year Old White and Nonwhite Population Projections	31
Figure 11: Hispanic and Non-Hispanic 18-19 Year Old Population Projections.....	32
Table 5: Language Spoken at Home by County, Florida, and U.S.	32
Figure 12: Language Spoken at Home	33
Educational Attainment	33
Table 6: Educational Attainment by County, Florida, and U.S.....	34
Figure 13: Educational Attainment by County, Florida, and U.S.	34
Educational Degrees and Programs granted in the United States	35
Table 7: Bachelor's Degrees Conferred by U.S. Degree-Granting Institutions Fall 2007 by Discipline Division and Sex	36
Table 8: Master's Degrees Conferred by U.S. Degree-Granting Institutions Fall 2007 by Discipline Division and Sex	37
Table 9: Doctor's Degrees Conferred by U.S. Degree-Granting Institutions Fall 2007 by Discipline Division and Sex	38
Regional Educational Institutions	39

Ave Maria University.....	39
Barry University.....	40
Edison State College.....	42
Hodges University	46
IMPAC University	47
Nova Southeastern University (NSU).....	47
Table 10:Degrees Offered at the NSU Fort Myers Educational Center.....	48
Rasmussen College.....	49
Southwest Florida College	50
State University System of Florida (SUS)	51
Table 11: Enrollment by SUS Institution, Fall 2008	52
Table 12: Top Ten Undergraduate Majors, Fall 2008.....	52
Summary	53
References	54

Executive Summary

Technology, innovation, and knowledge are key drivers of our global economy and are expected to continue to drive change for the nations of the world and the supporting higher education institutions. We live in a global, knowledge-based society where higher education is challenged to incorporate new innovations, and to provide increased accountability with limited funding. Colleges and universities are facing regional, national, and global competition for students. There are increasing numbers of programs that provide distance learning or online degrees. Educational centers or branch campuses are more common and many universities are expanding beyond their traditional service areas and states.

State funding will be very challenging as Florida faces some very hard choices for generating additional funding or reducing expenditures. The recession and loss of income and family wealth has pushed students and parents to consider less expensive colleges and universities that are closer to home. Many students are planning to work and are interested in building employment experience including internships, co-ops, and community and international experience.

The external environmental scan includes an economic outlook, occupation and industry trends, regional economic development and workforce studies, population and demographic trends, educational attainment levels, educational degrees granted, and a review of regional educational institutions. The external environmental scan, along with knowledge of the internal environment, allowed for the development of an initial draft SWOT analysis for use in the FGCU strategic planning process.

Strengths would include:

- Positive reputation in the external community;
- Recognition and quality of a accredited state university;
- Regional depth and breadth of programs and degrees;
- Location close to major population areas including Southeast Florida and greater Tampa area;
- Relatively new campus with new buildings and campus facilities;
- Desirable student housing;
- Medium size university (11,000 students) with relatively small classes;
- Community fundraising efforts;
- Community outreach, economic development support, and student service;
- Limited use of part-time faculty; and
- Responsiveness to workforce needs.

Weakness would include:

- Adjusting to pressures of growth;
- Endowment has been adversely affected by the recession;
- Alumni base small but growing;
- Limited resources forcing delays in program and degree development;
- Limited resources for faculty and staff development;
- Distinguishing qualities and identity are still being established, especially outside the region;
- Entry level student preparedness; and
- Other institutions offer a large number of classes in surrounding counties.

Opportunities would include:

- College age population increasing;
- Increasing numbers of adults returning to college due to the recession;
- Higher education increasingly viewed as the accepted standard in many employment settings;
- Increase in ethnic diversity in Southwest Florida, especially Hispanic;
- Globalization and second-circle university partnerships;
- Technology driving need for additional education;
- Development of a research park and regional business incubator system;
- Community's desire for regional entrepreneurship partnerships and educational programs;
- Partnerships with other educational institutions, economic development organizations, industry, and government;
- The high growth occupations for bachelor's degree are expected to be in education, business, computer science, engineering, human resource and labor relations, and health care;
- Aid and loan programs will be key factors in attracting students; and
- Increased awareness and interest in environmental and renewable resources and studies.

Threats would include:

- The State of Florida is expected to face unprecedented revenue shortfalls for several more years limiting or reducing state funding to higher education;
- Perceptions of higher education as not affordable to many families;
- Local economic problems including high unemployment and reduced incomes;
- Cost of new technology and facilities;
- Competition from colleges and universities (service region and online);
- Private, for-profit, and on-line universities' responsiveness to program and student scheduling demands;
- More regulation, reporting requirements, and oversight by state and federal government;
- State operating budget cuts;
- Limited state funds for capital projects;
- Perception of education as solely a means to a job;
- Increasing numbers of students having to work to stay in school;
- Inadequacy of financial aid;
- Reduced fundraising ability;
- Slower population growth reducing economic growth in the region; and
- Slower net in-migration reducing the demand for educational services.

The external environmental scan also allows for an expanded explanation of opportunities and threats that are external to the university. The opportunities identified include:

1. The recession has reduced employment opportunities creating lower opportunity costs and increasing the demand for higher education. Students and their parents are considering institutions that are closer to home and less costly. The university can expect more local area students, including those within a few hours' drive. The fast student growth of the university will drive the requirement for new facilities, faculty, and staff. There will be a growing number of students requiring housing on or near campus. The increases in students, faculty, and staff will spur additional development off campus.
2. The recession is also driving students to rely more heavily on financial aid and student loans when choosing their college or university. FGCU has an opportunity to assist students including those in under-represented groups. Given the importance to the students and parents, this may be an area that will require additional personnel and support to meet the increased demands and can be a significant differentiator for the university.

3. The high-growth occupations projected for the state requiring a bachelor's degree include teachers, management analysts, computer, software, and systems engineers and specialists, engineers, human resource and labor relations specialists, and health care specialists. The opportunity exists to expand and add additional programs and degrees to meet expected growth in these fields. FGCU will need to weigh the marginal benefits and costs of adding programs and degrees to meet the expected university growth. The university's planned growth provides flexibility to meet regional and state needs and to partner with the regional community on the development of the new programs.
4. The high-growth occupations projected for the state requiring a master's degree or higher include lawyers, pharmacists, physicians and surgeons, social workers, architects, educational and vocational counselors, and veterinarians. There may be additional opportunities to partner with other educational institutions to provide education tracks leading to these degrees. The university will be able to add master's and doctoral programs in areas such as health and biomedical sciences, education, engineering, business, computer sciences, and social sciences.
5. The percent of residents with a bachelor's degree is approximately seven percent Hendry County and 10 percent in Glades County. Approximately 20 percent of Charlotte County residents hold a bachelor's degree. This compares to the state average of 25 percent. There may be opportunities to work with Edison State College to offer courses in Charlotte and Hendry County.
6. The university is seen as a regional partner in economic development. The university should explore working with the regional educational institutions and the community to develop a regional entrepreneurship education and assistance program. Currently, the university has the Small Business Development Center on campus and recently announced the Florida Gulf Coast University Innovation Hub research park and Backe Chair in renewable energy. The university should continue to build regional partnerships in support of research parks and a business incubator network.
7. The university has taken a leadership role in green and sustainable energy and practices. Beginning in 2009, FGCU is committed to begin purchasing or producing at least 15 percent of its electricity consumption from renewable

sources. A new \$14 million 16-acre, two megawatt solar array is currently being constructed on campus. This allows the university to demonstrate its commitment to green and sustainable energy practices.

8. The Hispanic population in Southwest Florida is expected to grow considerably between 2010 and 2015. The University of Florida's Bureau of Economic and Business Research (BEBR) predicts that approximately 30 percent of the 18 to 19 year old population will be Hispanic. Twenty-three percent of Collier County homes primarily spoke Spanish in the period 2005 to 2007, compared to 14 percent in Lee County and 19 percent for the state. Several other regional colleges and universities have enacted programs to assist Spanish-language students' transition to college including providing fundamental language programs. The university may want to consider similar programs.

The threats include:

1. The State of Florida long-range financial outlook was released on September 15, 2009 by the Florida Legislature Office of Economic and demographic Research. The state budget outlook for critical needs are predicted to be a:
 - o surplus of \$381 million in FY 09-10;
 - o deficit of \$923 million in FY10-11;
 - o deficit of \$2,335 million in FY 11-12; and
 - o deficit of \$1,141 million in FY 12-13.

The total estimated expenditures for critical needs are \$21,481 million in FY 09-10 increasing to \$27,116 million in FY 12-13. If the state budget covers critical and high priority needs, the budget's deficits would increase significantly. The budget is predicted to be a:

- o deficit of \$2,654 million in FY 10-11;
- o deficit of \$5,473 million in FY 11-12; and
- o deficit of \$5,229 million in FY 12-13.

The total estimated expenditures for critical needs and high priority needs are \$21,481 million in FY 09-10 rising to \$31,119 million in FY 12-13. Fiscal strategies will be required to address the projected gap between revenues and expenditures. These may include budget reductions and reduced growth funding, trust fund transfers or sweeps, or revenue enhancements and redirections. Federal funding will be limited due to increasing pressure to reduce the overall size of the federal budget deficits.

2. The state experienced out-migration for April 2008 to April 2009. Slower in-migration and overall population growth for Southwest Florida is expected over the next few years. The slower population growth will reduce overall regional

development in the Southwest Florida area. Expect increased competition for students from other colleges and universities.

3. Many students have indicated that they are planning to work to support their university education. Other colleges and universities are offering night and evening classes. Some are offering online degree programs. The opportunity for the university is to work with the business community to provide more university, co-op and internship work for students.
4. Several of the regional colleges and universities are primarily focused on adult and continuing education. Edison State College is planning to offer more bachelor's degrees and has a lower overall cost to the students and their parents. FGCU has a wider array of programs, degrees and facilities. Edison State College has a new strategic initiative to provide affordable student housing as needed across its district. Expect increased competition for students.

Economic Outlook

The global economy is currently experiencing one of the worst recessions since the end of the Second World War. The United States officially entered a recession in December 2007 and is expected to show slow gradual economic growth sometime during the later part of 2009. This is the tenth economic recession since 1950 and one of the deepest and longest recessions. The Southwest Florida region has felt the economic slowdown beginning in July 2007 when unemployment for Lee County rose to 5.2 percent and the five-county region served by the University saw unemployment of 5.5 percent. Southwest Florida had been one of the fastest growing areas in the country creating jobs and opportunities based on construction, agriculture, and tourism.

The current recession has hit our local region very hard since it was a result of a crisis in both the financial and housing markets and led to very low consumer confidence. The result has been that Florida has seen its first out migration of 58,000

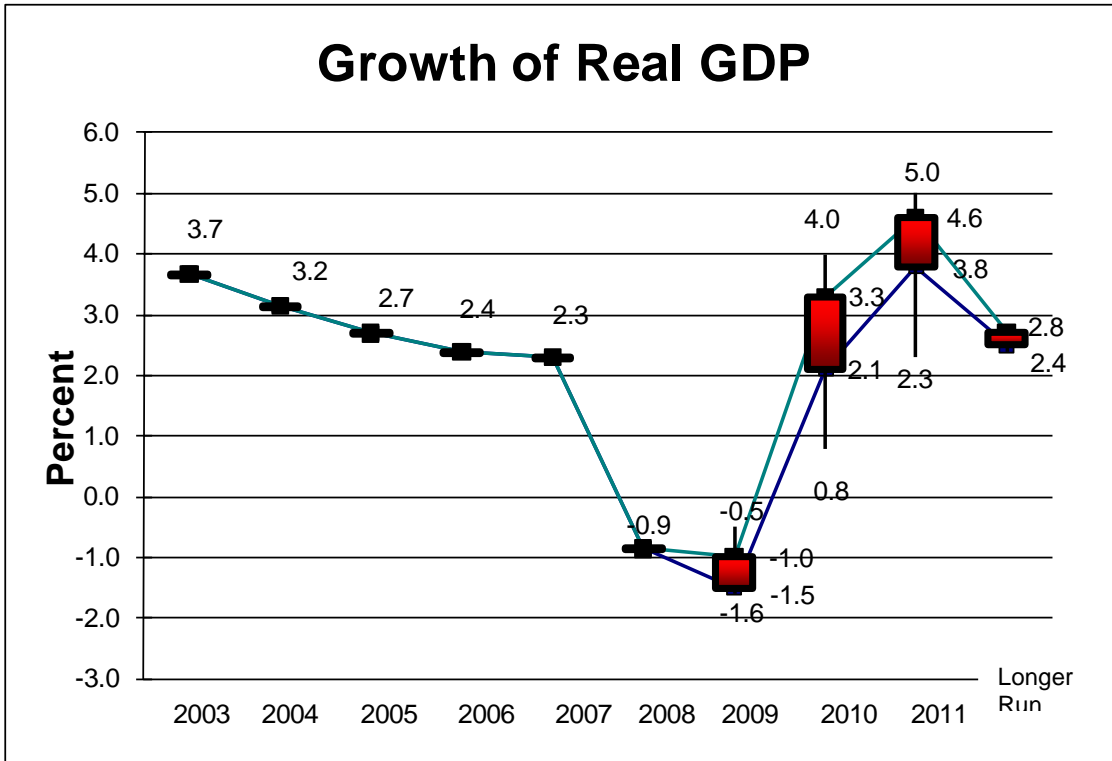
people from April 2008 to April 2009, according to new estimates just released by the University of Florida's Bureau of Economic and Business Research. Our region and Florida in general are very dependent on the economic drivers of population growth and tourism and both have been hurt by the global recession.

Economic activity is expected to show growth beginning later this year but the unemployment rates will remain high for several more years and the financial and housing markets will continue to adjust to the large number of foreclosures, new requirements and regulations, and more conservative credit requirements.

One of the most respected economic forecasts for the nation is produced by the Federal Reserve Systems' Open Market Committee. This is an important forecast since growth in our region and Florida will depend on a healthy national and international economy. The recovery is expected to be gradual and it is anticipated that unemployment will remain high through 2011. The forecasts are shown using "box and whiskers" Figures 1 and 2. The red boxes are the central tendency forecast and the full range of uncertainty is reflected in the whiskers or vertical lines.

Real GDP has declined in 2009 and the chart shows a recovery in 2010, but it will be several years before the economy returns to a more normal long-run trend. In 2010 and 2011, real GDP is forecast to have a fairly rapid recovery followed by more normal long-term economic growth of around two and one-half to three percent.

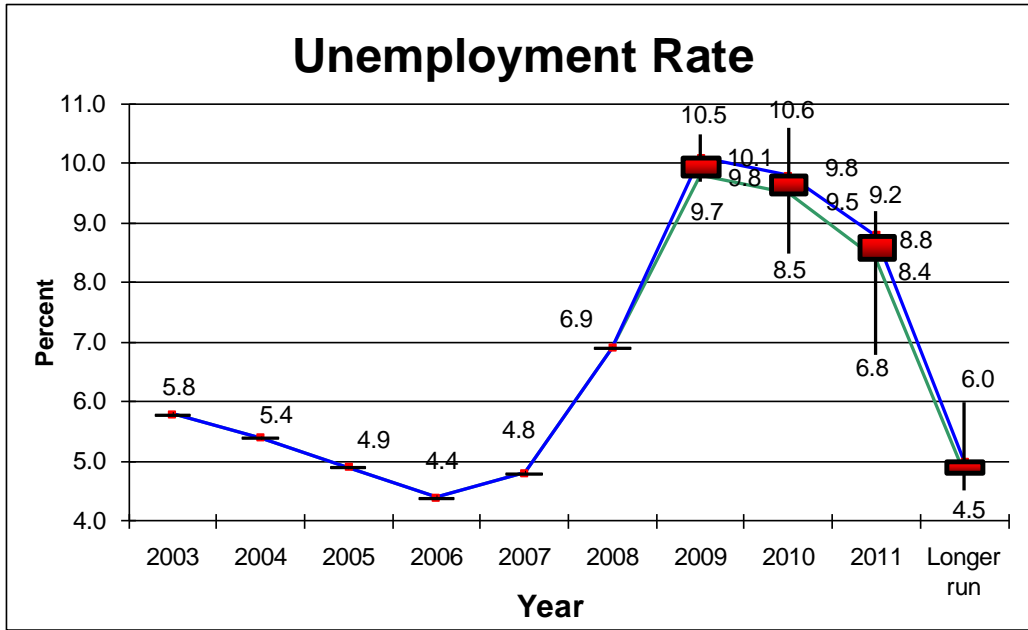
Figure 1: National Real GDP Growth



Source: Minutes of the Federal Open Market Committee, June 23-24, 2009.

The national unemployment rate is expected to rise in 2009 to between 9.7 and 10.5 percent. The June 2009 national unemployment rate was 9.5 percent, so unemployment during the second half of 2009 is expected to rise. Unemployment in 2010 is expected to continue at a slightly lower but historically high rate of more than 9.5 percent. For 2011, the unemployment rate is expected to be approximately 8.5 percent before finally declining to a long-run rate of around five percent. The projections for unemployment are for the fourth quarter of each year.

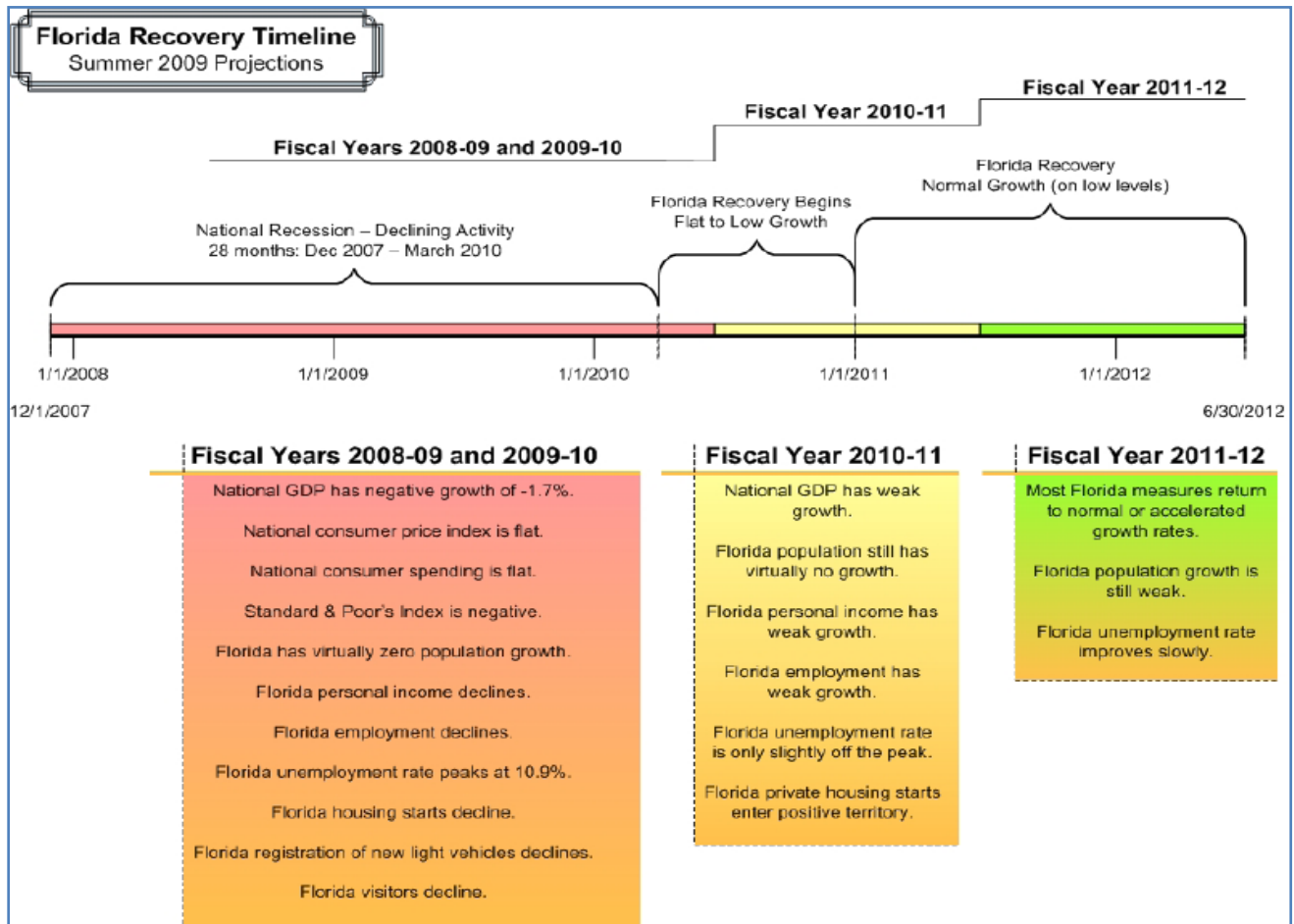
Figure 2: National Unemployment Rate



Source: Minutes of the Federal Open Market Committee, June 23-24, 2009.

The State of Florida developed a economic forecast based on an estimating conference held in July 2009 and provided the following timeline for recovery which is shown in Figure 3. Similar to the national forecast, the state forecast predicts slow economic growth with high unemployment rates for several years. The fiscal year for the state ends in June so fiscal year 2010-11 includes the last half of 2010 and the first half of 2011. This forecast is predicting weak growth through the first half of 2011 with virtually no population growth. The Florida economy is forecast to be weak in fiscal year 2011-12 with slow population growth and high unemployment.

Figure 3: State of Florida Economic Projections



Source: Florida EDR: <http://edr.state.fl.us/conferences/fleconomic/floridaeconomic.htm>

Table 1 provides forecasts of some of the key economic activity measures for the State of Florida. Per capita real income is expected to recover to more normal long-term trends by FY 12-13. Employment begins to grow more rapidly lagging behind economic activity in FY 11-12. The long-term unemployment rate tends to be around five percent. The unemployment continues to be above that level through FY14-15. The average annual wage per job is fairly flat through FY10-11 but begins to grow more rapidly beginning in FY11-12.

Table 1: State of Florida Economic Outlook

Selected State of Florida Economic Measure Forecasts

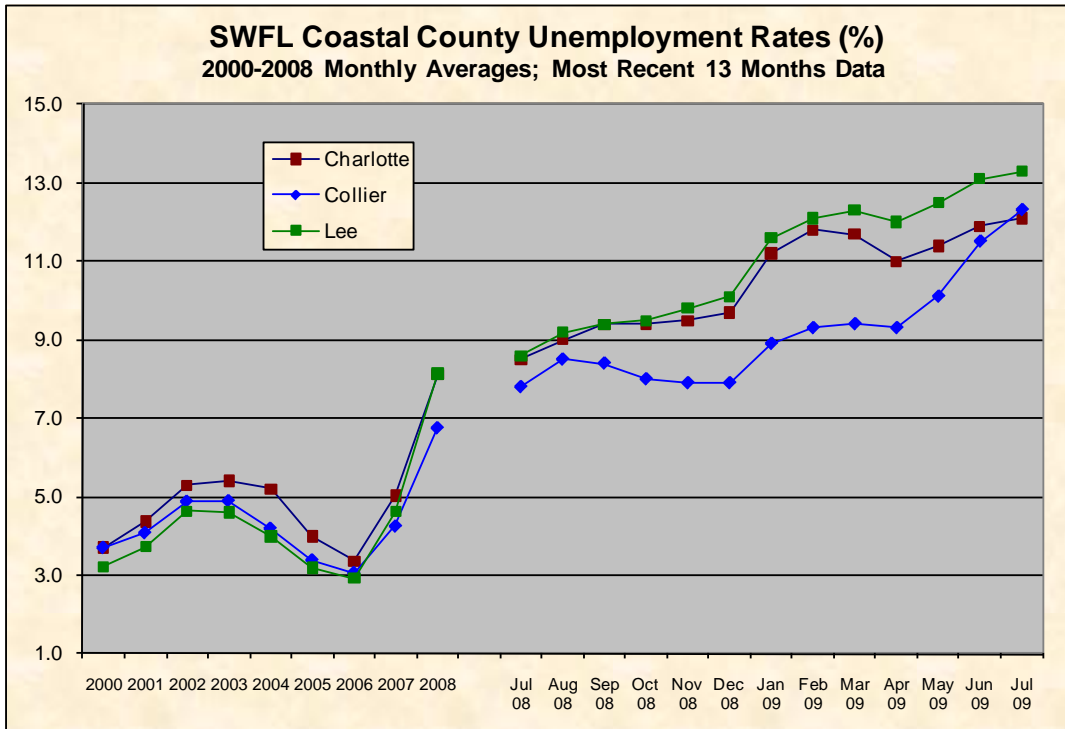
Economic Measure	FY09-10	FY 10-11	FY 11-12	FY 12-13	FY 13-14	FY 14-15
Real Per Capita Income (% Change)	-1.9%	0.0%	1.9%	2.6%	2.6%	2.8%
Non-farm Employment (% Change)	-3.0%	1.4%	3.3%	2.9%	2.4%	2.2%
Unemployment Rate (%)	10.9%	10.8%	9.9%	9.1%	8.3%	7.6%
Average Annual Wage (000 \$)	43.2	43.8	44.7	45.8	47.1	48.4

Source: Florida EDR: <http://edr.state.fl.us/conferences/fleconomic/floridaeconomic.htm>

The unemployment rates for Southwest Florida have risen above those for the nation and Florida in general due to the importance of construction and tourism to the local regional economy. Figures 4 and 5 show the latest monthly unemployment rates for the coastal and inland counties in FGCU's five-county service region.

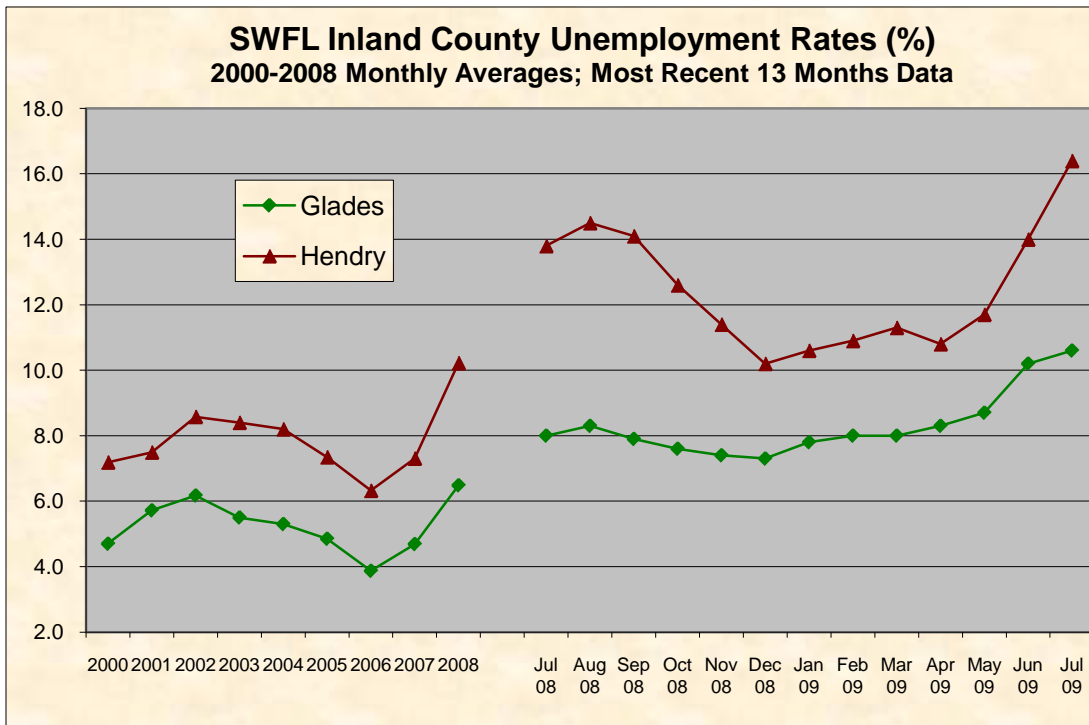
Unemployment in Lee County rose to 13.2 percent in July 2009, compared to 9.7 percent for the nation and 11.0 percent for the state. The July unemployment for Charlotte County was 12.0 percent and Collier was 12.1 percent. The inland counties of Hendry and Glades were also hit hard by the recession, with July 2009 unemployment of 16.4 percent for Hendry and 10.6 percent for Glades. The unemployment rate is expected to rise in the summer so part of the increase is due to the seasonality of the local economy but a large part of the rise in unemployment is due to the overall effect of the current steep recession.

Figure 4: Historical Coastal County Unemployment Rates



Source: Regional Economic Research Institute, FGCU, August, 2009

Figure 5: Historical Inland County Unemployment Rates



Source: Regional Economic Research Institute, FGCU, August, 2009

The Institute also tracks the airport activity at Southwest Florida International Airport, housing starts, and tourism expenditures, as well as other variables such as sales of existing single-family homes. The latest monthly economic indicator report is available on the Regional Economic Research Institute's website at www.fgcu.edu/cob/reri. As of August 2009, the tourism, airport traffic, and housing starts were down, showing the overall impact of the recession on the Southwest Florida economy.

There have been some bright signs such as increased sales of existing homes especially those in the lower price ranges as banks work to sell homes as short sales and as foreclosures work their way through the court system. Consumer confidence remains low. However, it has risen above its February low of 25.3, and as of July 2009, had risen to 46.6. This indicator is tracked by the Conference Board and is generally closer to a 100 during normal economic times. The stock market has risen indicating that there are expectations that the economy is not getting worse and is most likely beginning to improve. Consumers have increased their savings and reduced expenditures especially for durable goods such as furniture, appliances, and automobiles.

The regional economy's recovery will be very slow and lag behind the rest of the country since its economic drivers have been tourism and net in-migration or population increases. Both of these will have to wait until the financial and banking issues can be resolved. Higher credit and financial requirements for the financial sector can be expected as the nation works to rewrite the regulatory requirements. Consumer

confidence will eventually return to more normal numbers but given the expected high levels of unemployment through 2012, the regional economy will experience a very slow and gradual improvement in the overall economy.

All of these forecasts point to a slow and gradual recovery for the nation, Florida, and especially Southwest Florida. Much of the strategic planning horizon of 2010 to 2015 will be in a period of recovery from one the worst economic recessions since the great depression. Given that the economy will be in a recession or recovering from a recession during much of the strategic planning period of 2010 to 2015, what does this imply about the demand for higher education and enrollments? A survey was released in January 2009, "Report on the Impact of the Economy on College Enrollment", by Longmire and Company, that asked about college plans by surveying over 1,000 U.S. households. The survey found that 55 percent of the households had modified their plans somewhat or changed them dramatically by taking the following actions:

- Enroll in a less expensive college (53%)
- Work while attending college (47%)
- Rely more heavily on financial aid counseling (44%)
- Obtain a larger loan (38%)
- Attend a college closer to home (38%)
- Attend in-state college (34%)
- Visit fewer college campuses (25%)
- Change from a private to a public college (24%)
- Live at home while attending college (21%)
- Change from a 4-year college to a community college (11%)
- Change the intended major (4%)
- Postpone attending college (4%)
- Consider online degree program (3%)
- Change from a public to a private college (2%)

(Source: <http://www.longmire-o.com/education/economicimpactcollegereport.pdf>)

The survey results are consistent with economic theory which states that the enrollment will rise since students will have a hard time finding employment and have a lower opportunity cost of attending college. Many students will have to consider lower-cost options for attending college and rely on part-time work and financial aid. The students and their families will weigh the added benefits from obtaining a college degree and compare institutions of higher learning and degree programs.

Occupations and Industry Trends

There is a long-term shift to service-providing employment away from goods-producing industries. Goods-producing industries are expected to lose employment over the 2006 to 2016 period while service-producing industries are expected to add 15.7 million new jobs to the U.S. economy.¹ Occupations in health, education, sales, food service, and office and administrative services are predicted to create the most positions between 2006 and 2016. One of the fastest growing occupations in both number and percent is predicted to be computer software applications engineers.

1. Occupational Outlook Handbook, 2008-2009 Edition, BLS

The primary industries for Southwest Florida have been tourism and hospitality, retail trade, health care, and construction-related industries. Table 2 provides an example of the top occupations within Lee County. The other counties in the Southwest Florida Region have a similar top 25 occupations so tables are not presented for each county.

Table 2: Top 25 Lee County Occupations for 2008

	Occupation	Employment	Annual Wage
1	Retail Salespersons	9,620	\$30,950
2	Cashiers	8,200	\$18,491
3	Waiters and Waitresses	6,480	\$20,946
4	Registered Nurses	5,140	\$66,477
5	Stock Clerks and Order Fillers	5,090	\$22,485
6	Secretaries, Except Legal, Medical, and Executive	4,570	\$30,098
7	Combined Food Preparation & Serving Workers	3,680	\$18,346
8	Landscaping and Grounds keeping Workers	3,670	\$24,294
9	Bookkeeping, Accounting, and Auditing Clerks	3,610	\$32,261
10	Office Clerks, General	3,480	\$25,542
11	Nursing Aides, Orderlies, and Attendants	2,880	\$25,584
12	Janitors & Cleaners	2,810	\$23,026
13	Executive Secretaries and Administrative Assistants	2,740	\$39,811
14	Customer Service Representatives	2,520	\$30,306
15	Cooks, Restaurant	2,500	\$23,858
16	First-Line Supervisors/Managers of Construction Trades and Extraction Workers	2,460	\$56,451
17	Carpenters	2,420	\$40,290
18	Maids and Housekeeping Cleaners	2,240	\$19,282
19	First-Line Supervisors/Managers of Retail Sales Workers	2,230	\$48,838
20	Sales Representatives, Services, All Other	2,210	\$49,774
21	Security Guards	2,200	\$23,816
22	Construction Laborers	2,190	\$24,877
23	Food Preparation Workers	2,100	\$20,030
24	Maintenance and Repair Workers, General	2,100	\$32,552
25	Receptionists and Information Clerks	2,100	\$25,854

Source: Florida AWI, 2008 Occupations

Tables 2 and 3 provide the Florida Agency for Workforce Innovation (state agency) occupational projections for the state of Florida. Table 3 shows the projected gains in employment from 2008 to 2016 for occupations that require a bachelor's degree. These include teachers, management analysts, computer, software, and systems engineers and specialists, engineers, human resource and labor relations specialists, health care specialists, clergy, and chief executives.

Table 3: Florida's Top 25 High Growth Occupations Requiring a Bachelor's Degree, 2008 and 2016

	Occupation	Employment		Growth	Average
		2008	2016		Annual Wage
1	Elementary School Teachers, Except Special Education	75,241	88,774	13,533	\$65,125
2	Management Analysts	54,142	65,028	10,886	\$78,770
3	Teachers and Instructors, All Other	59,824	68,068	8,244	\$46,030
4	Middle School Teachers, Exc. Special & Voc. Education	33,061	38,429	5,368	\$66,061
5	Secondary School Teachers, Exc. Special and Voc. Ed.	41,203	46,134	4,931	\$68,515
6	Computer Software Engineers, Systems Software	13,989	17,747	3,758	\$83,699
7	Civil Engineers	15,326	18,767	3,441	\$78,853
8	Human Resources, Training, & Labor Relations Spec.	15,359	18,422	3,063	\$55,328
9	Physical Therapists	12,204	15,097	2,893	\$74,922
10	Training and Development Specialists	12,884	15,531	2,647	\$51,979
11	Special Education Teachers, Preschool - Elementary	10,946	13,448	2,502	\$68,058
12	Clergy	14,268	16,737	2,469	\$41,454
13	Kindergarten Teachers, Except Special Education	11,418	13,747	2,329	\$64,626
14	Industrial Engineers	9,215	11,429	2,214	\$69,035
15	Engineers, All Other	11,452	13,306	1,854	\$79,269
16	Education, Training, and Library Workers, All Other	11,767	13,618	1,851	\$48,901
17	Chief Executives	23,685	25,511	1,826	\$169,624
18	Directors, Religious Activities and Education	10,205	12,003	1,798	\$38,979
19	Market Research Analysts	7,354	8,864	1,510	\$59,426
20	Physician Assistants	4,468	5,687	1,219	\$84,302
21	Occupational Therapists	5,360	6,485	1,125	\$72,238
22	Special Education Teachers, Middle School	5,508	6,535	1,027	\$65,998
23	Mechanical Engineers	6,441	7,427	986	\$74,630
24	Business Teachers, Postsecondary	3,953	4,915	962	\$100,381
25	Religious Workers, All Other	5,230	6,160	930	\$26,707

Source: Florida AWI Projections

The projected 25 highest growth Florida occupations requiring a master's or higher degree are shown in Table 4. These include lawyers, pharmacists, doctors, social workers, architects, educational and vocational counselors, veterinarians, psychologists, specialized teachers, mental health counselors, postsecondary teachers, and other health care providers.

Table 4: Florida's Top 25 High Growth Occupations Requiring a Master's or higher Degree, 2008 and 2016

	Occupation	Employment		Growth	Annual Wage
		2008	2016		
1	Lawyers	54,661	65,863	11,202	\$109,803
2	Pharmacists	18,502	22,830	4,328	\$101,421
3	Physicians and Surgeons, All Other	17,722	21,066	3,344	\$172,016
4	Child, Family, and School Social Workers	10,619	12,970	2,351	\$39,582
5	Architects, Except Landscape and Naval	8,573	10,671	2,098	\$66,664
6	Health Specialties Teachers, Postsecondary	7,514	9,392	1,878	\$123,448
7	Medical and Public Health Social Workers	6,828	8,574	1,746	\$44,845
8	Educational, Vocational, and School Counselors	1,460	3,195	1,735	\$54,558
9	Mental Health & Substance Abuse Social Worker	6,379	7,835	1,456	\$36,275
10	Family and General Practitioners	9,665	10,972	1,307	\$157,082
11	Veterinarians	3,599	4,892	1,293	\$90,210
12	Clinical, Counseling, and School Psychologists	5,761	6,731	970	\$67,059
13	Art, Drama, and Music Teachers, Postsecondary	3,597	4,482	885	\$72,218
14	Mental Health Counselors	4,167	5,029	862	\$40,414
15	Health Diagnosing & Treating Practitioners, Other	5,484	6,334	850	\$72,613
16	Speech and Language Pathologists	6,059	6,861	802	\$65,541
17	Education Teachers, Postsecondary	3,088	3,849	761	\$77,730
18	Dentists, General	7,966	8,664	698	\$149,635
19	Chiropractors	4,618	5,313	695	\$75,130
20	Counselors, All Other	2,929	3,602	673	\$37,107
21	English & Literature Teachers, Postsecondary	2,651	3,283	632	\$69,805
22	Engineering Teachers, Postsecondary	2,230	2,811	581	\$108,534
23	Mathematical Science Teachers, Postsecondary	2,700	,278	578	\$77,979
24	Operations Research Analysts	6,175	6,701	526	\$59,738
25	Medical Scientists, Except Epidemiologists	2,272	2,798	526	\$74,318

Source: Florida AWI Projections

Regional Economic Development and Workforce Studies

The university has supported county and regional economic development efforts across its primary service area. In addition to studies and expertise, the latest economic development efforts include a new regional focus with the creation of a new economic development organization that will be rolling out a new regional branding symbol and marketing effort in the next couple of months.

Florida Gulf Coast University's Regional Economic Research Institute was established to bring economic analysis and expertise to the regional economic issues and concerns in support of community outreach. The Institute completed a regional economic development planning study in August 2009 summarizing business incubator network best practices, regional desires, and long-term recommendations for entrepreneurial assistance and the development of a Southwest Florida regional business incubator network. The study included five area focus groups and 22 key informant interviews that were used to gather information on the region and its needs.

The focus group key informant participants identified a variety of industries and businesses as most likely to benefit from entrepreneurial assistance and a regional business incubator network, including:

- Medical Care (service, equipment, supplies, etc)
- Medical technology (biomedical, medical records, etc.)
- Pharmaceutical
- Eco-tourism (land, marine, etc)
- Aquaculture
- Software and services
- Multi-media

- Alternate energy (particularly solar, but also wind, water, bio-fuels, etc.)
- Green (construction, retrofitting, etc)
- Light manufacturing (bikes, kayaks, etc)
- Export (principally to Central and South America)
- Agriculture

There was a strong interest in having more communication and coordination of community and regional resources that assist new firms. Many of the interviewees expressed a concern about the population's overall general lack of knowledge and skills needed to successfully run a business.

The focus groups indicated that resource and climate factors that affect the success or failure of new business in the Southwest Florida region include:

- The community workforce;
- Educational system;
- Availability of capital;
- Government permitting regulation and zoning codes;
- Healthcare;
- Community support, culture, and infrastructure;
- Affordable housing;
- Major research university; and
- Communities having a targeted strategic focus.

The interviewees suggest ways to improve the overall climate for starting new businesses and provided the following recommendations:

- Access to physical facilities and technology;
- Raise awareness of resources available;
- Build mentor pool of the seasonal and retired executives;
- Increase business and entrepreneurial training including the use of incubators;
- Improve broadband capability;
- Improve networking across the county and region;
- Improve talent pool;
- More physical and educational infrastructure;
- Encourage personal risk taking within a supportive business environment;

- Facilitate the new business development process;
- Need a regional network, pooled insurance and supplies;
- Add more business support services;
- A technology link that provides access;
- Networking to channel resources;
- Quicker, more flexible permitting processes;
- Region needs to work together and have a collective strategy;
- Improve the regulatory environment and business tax structure;
- Reduction of fees that act as barriers to new business;
- Reach out to high schools;
- School systems need to explore other methods to train young people in vocational skills; and
- Take a proactive approach to assisting small business.

The study interviews, literature review, and focus groups highlighted the important regional leadership roles that colleges and universities play in economic development, entrepreneurial education and assistance, and the development and growth of research parks and business incubators. The *Southwest Florida Regional Business Incubator Planning Study* is available online at www.fgcu/cob/reri and provides recommendations for enhancing regional entrepreneurship education and assistance along with regional business incubator network best practices.

A Lee County education and training audit was completed by the Wadley-Donovan Group for the Horizon Council in December 2007. The study was completed at the end of an economic expansion and a tight labor market. At that time, the labor-recruiting challenges were in healthcare, hospitality, information technology, supervisory, and management occupations. Surveyed employers reported that the Lee County workforce had a slightly unsatisfactory level of basic skills in verbal

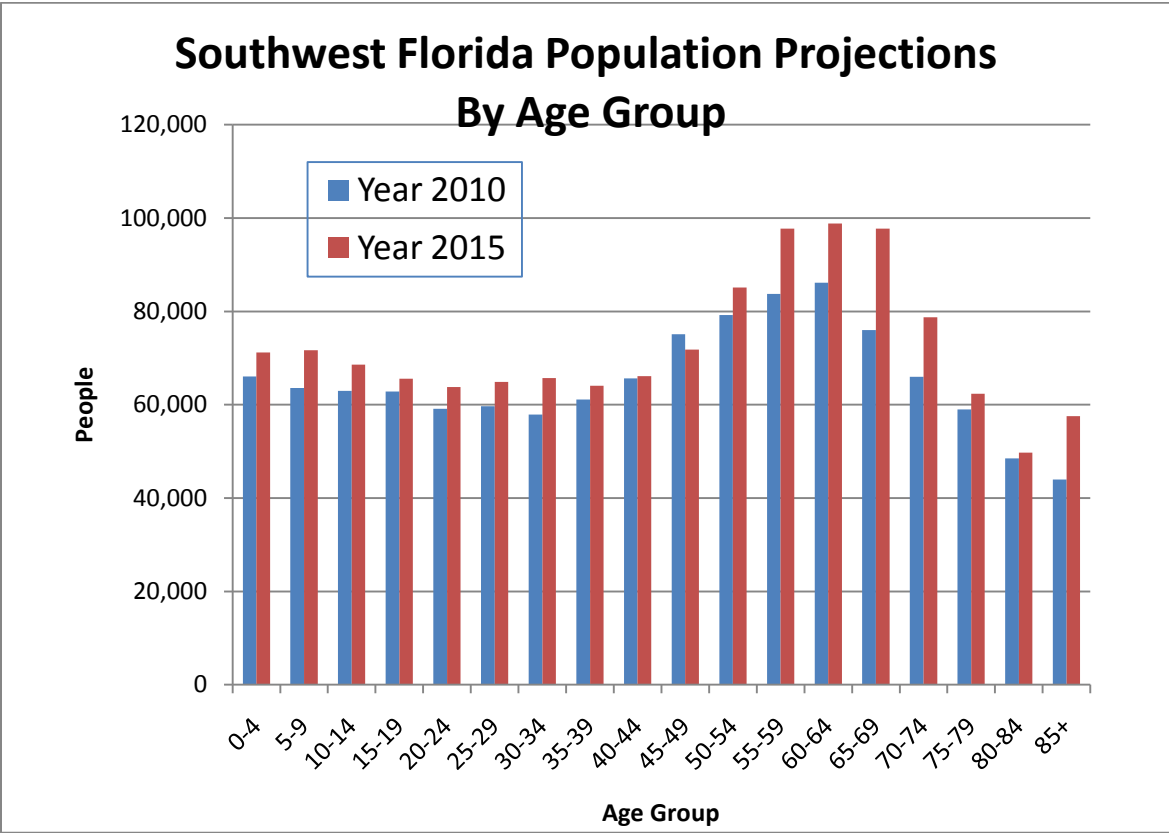
communication and comprehension, reading comprehension, math, thinking and judgment, problem solving, and written communications.

A survey of not-employed residents in August 2007 indicated that the top training programs requested were in the medical- related, computer, business, nursing, financial services, management, construction, education, and manufacturing fields. Employed workers were also surveyed and indicated an interest for training in the computer, business, medical related, education, nursing, management, auto repair, leisure and hospitality, financial services, and office/clerical fields. The Wadley-Donovan study recommends stronger linkages between the colleges and universities and local employers to improve outreach and the local workforce.

Population and Demographics

The Bureau of Economic and Business Research provided the latest population forecasts for 2010 and 2015. The age distribution of the primary service area of Charlotte, Collier, Glades, Hendry, and Lee Counties is shown in Figure 6. The blue bars represent the population distribution in 2010 and the red bars represent the population projection for 2015. The "baby boom" is clearly visible and is generally defined as those born between 1946 and 1964 and is represented by the blue bars between the ages of 45 and 64. The college age groups of 15 to 19 and 20 to 24 are expected to grow with time, as shown in the Figure 6. The total population in the five-county service area is predicted to be 1.2 million people in 2010 increasing to 1.3 million people by 2015 and growing by approximately 11 percent over the five-year period.

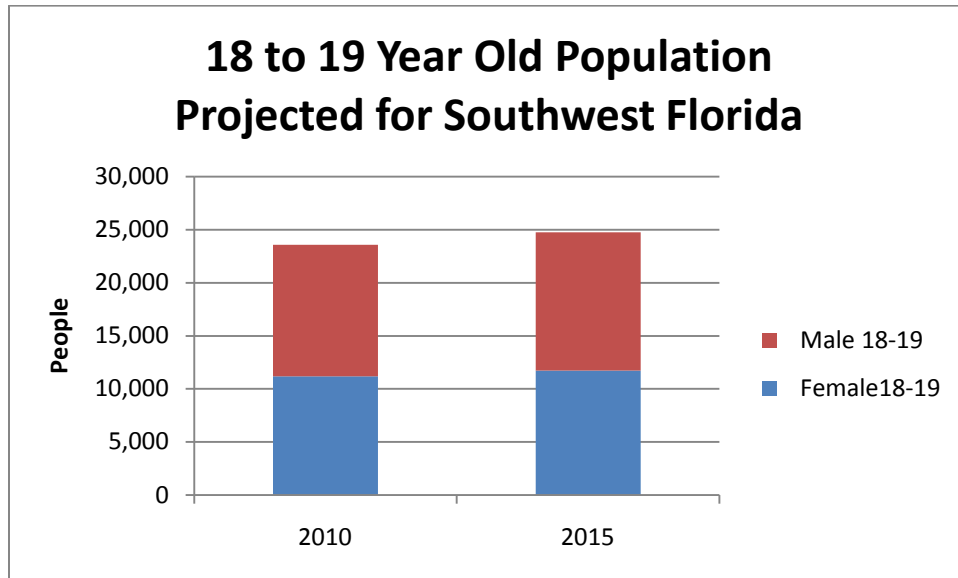
Figure 6: Southwest Florida Population Projections by Age Group



Source: University of Florida, Bureau of Economic and Business Research, Bulletin 154, June 2009.

The forecasts for the Southwest Florida 18 and 19 year old population are shown in Figure 7 for the years 2010 and 2015. There are expected to be 22,926 18-to-19 year olds in FGCU's five-county service area in 2010, growing to 25,400 in 2015.

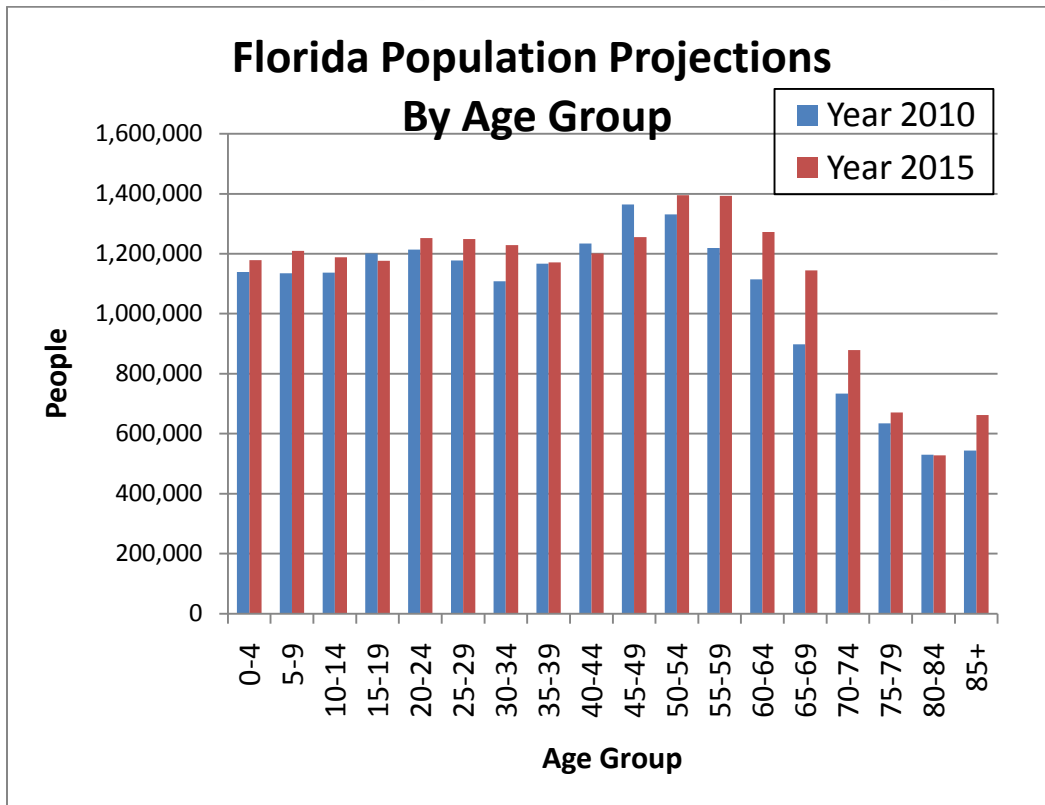
Figure 7: Southwest Florida 18-19 Year Old Population Projections



Source: University of Florida, Bureau of Economic and Business Research, Bulletin 154, June 2009.

The Miami Herald (August, 2009) ran an article reporting that Florida's population had its first decline since 1946. This is based on a study by the University of Florida that indicated that the state lost about 58,000 people and Lee County lost 8,601 people from April 2008 to April 2009. This net out-migration is expected to be temporary as the nation, state, and region adjust to the one of the steepest and longest recessions since the great depression. FGCU can expect to increase enrollment from students beyond the primary service area as the institution becomes better known and as it expands its courses and degrees being offered. Figure 8 provides the Florida population forecasts for 2010 and 2015. The total population for Florida in 2010 is predicted to be 18.9 million people growing approximately six percent over five years to 20.1 million in 2015.

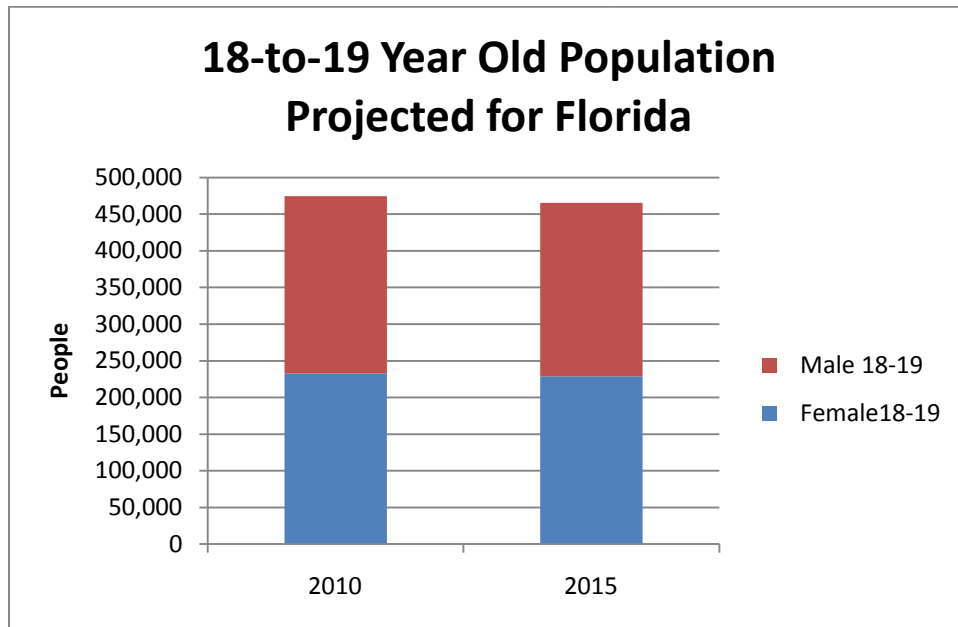
Figure 8: Florida Population Projections by Age Group



Source: University of Florida, Bureau of Economic and Business Research, Bulletin 154, June 2009.

The population projections for Florida's 18-to-19 year old population shows a small decline for this age group between 2010 and 2015. In 2010, projections show 474,000 people in this age group falling to 466,000 in 2015. This is relatively flat which is consistent with the long and deep recession but these are uncertain times and it is very likely that the forecasts will change with time. The 18-to-19 population age group is shown in Figure 9. The male population is predicted to be approximately 51 percent of the 18-to-19 age bracket.

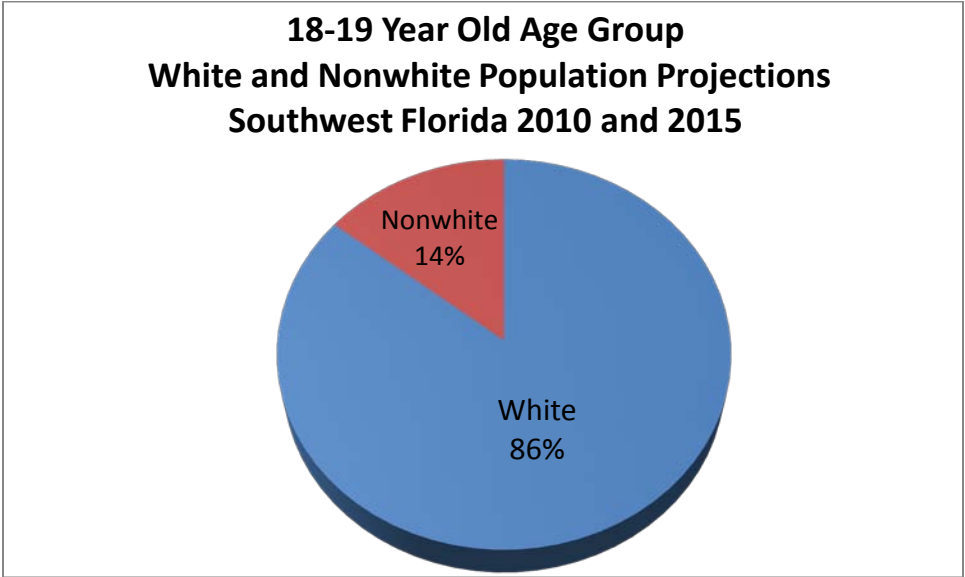
Figure 9: Florida 18-19 Year Old Population Projections



Source: University of Florida, Bureau of Economic and Business Research, Bulletin 154, June 2009.

The population projections included estimates of the white and nonwhite populations and Figure 10 provides the percentages for the 18-19 age group. The percentages are 14 percent for nonwhite and 86 percent for white population for the Southwest Florida region that includes the five counties served by Florida Gulf Coast University. The white 18 to 19 year old population is forecast to be 20,205 people in 2010 and the nonwhite 18 to 19 year old population is forecast to be 3,365 people in 2010.

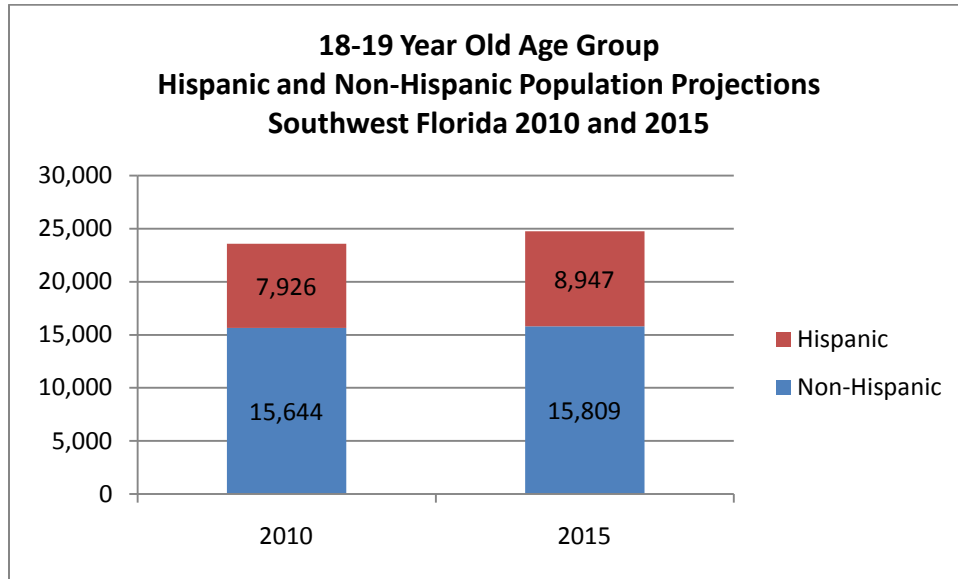
Figure 10: Southwest Florida 18-19 Year Old White and Nonwhite Population Projections



Source: University of Florida, Bureau of Economic and Business Research, Bulletin 154, June 2009.

The Hispanic population is an important sector in Southwest Florida and is expected to grow. Southwest Florida's 18-19 year old Hispanic population is forecast to total almost 8,000 in 2010 and approximately 9,000 in 2015, as shown in Figure 11. This is 34 percent of the 18-19 year old group in Southwest Florida in 2010 growing to 36 percent in 2015.

Figure 11: Hispanic and Non-Hispanic 18-19 Year Old Population Projections



Source: University of Florida, Bureau of Economic and Business Research, Bulletin 154, June 2009.

The percentage of households that speak English, another language, and Spanish are provided in Table 5. The differences across the counties in the primary service area are very different, with Charlotte County having the lowest level of non-English at approximately eight percent and Collier close to 30 percent. Spanish tends to account for the largest share of non-English language spoken at home.

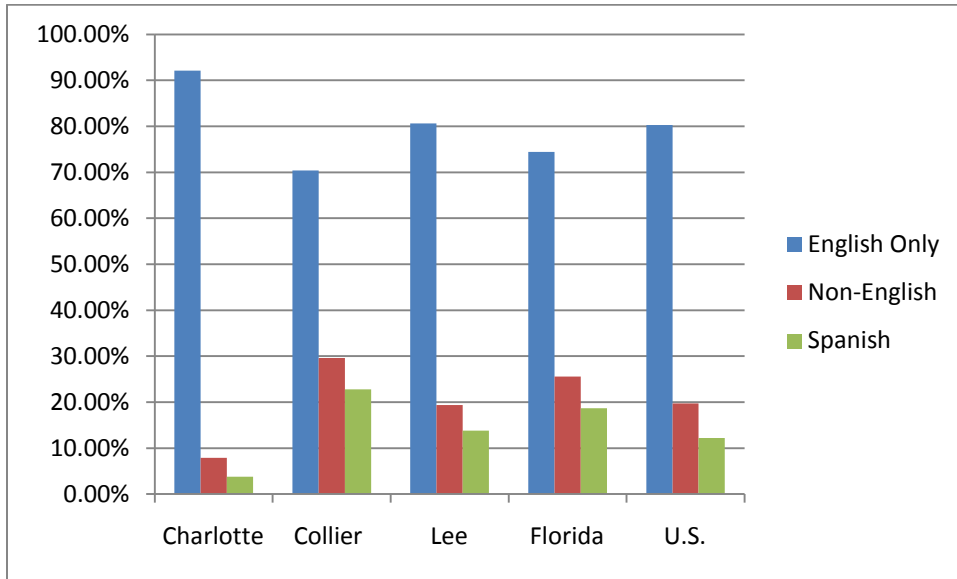
Table 5: Language Spoken at Home by County, Florida, and U.S.

	Charlotte	Collier	Lee	Florida	U.S.
English only	92.1%	70.4%	80.6%	74.4%	80.3%
Non-English	7.9%	29.6%	19.4%	25.6%	19.7%
Spanish	3.8%	22.8%	13.8%	18.7%	12.2%

Source: U.S. Census, 2005-2007 American Community Survey and 2009 Statistical Abstract

Table 5 is charted in Figure 12 below.

Figure 12: Language Spoken at Home



Source: U.S. Census, 2005-2007 American Community Survey and 2009 Statistical Abstract

Educational Attainment

The educational attainment for Charlotte, Collier, Glades, Hendry, and Lee Counties is shown in Table 6 along with estimates for the Florida and the U.S. The educational attainment in the primary service area of Southwest Florida varies by county and is influenced by the age distribution of the residents and their industry type. Charlotte County had the highest percent of high school graduates or higher at 88.1 percent. Collier County had the highest bachelor's degree or higher educational attainment of 30 percent and graduate or professional degrees at 11.5 percent.

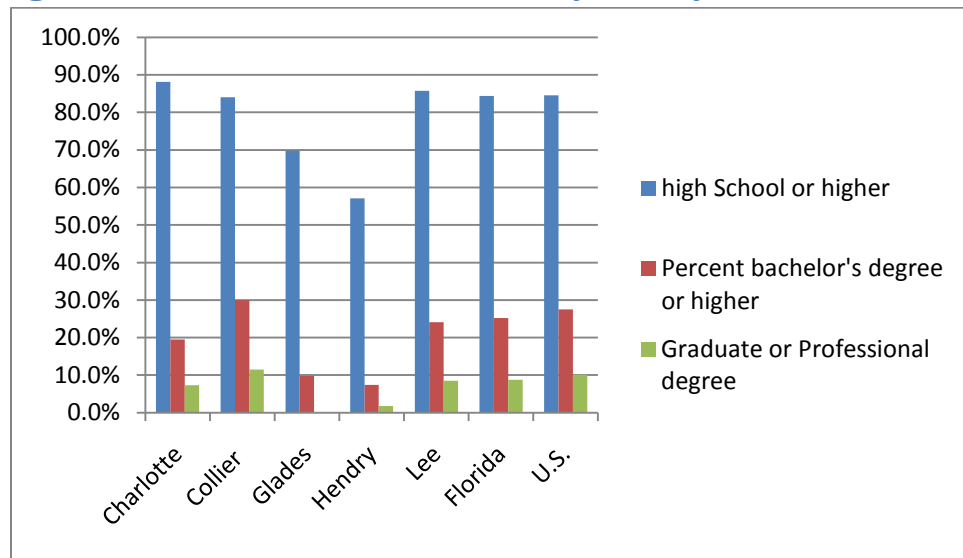
Table 6: Educational Attainment by County, Florida, and U.S.

	Charlotte	Collier	Glades	Hendry	Lee	Florida	U.S.
Percent high school graduate or higher	88.1%	84.0%	69.8%	57.1%	85.7%	84.4%	84.5%
Percent bachelor's degree or higher	19.5%	30.0%	9.8%	7.4%	24.1%	25.2%	27.5%
Graduate or Professional degree	7.3%	11.5%	NA	1.8%	8.5%	8.8%	10.1%

Source: 2005-2007 U.S. Census, American Community Survey, 2007 Population Estimates, and Florida EDR County Profiles.

The Table 6 values are charted in Figure 13 below.

Figure 13: Educational Attainment by County, Florida, and U.S.



Source: 2005-2007 U.S. Census, American Community Survey, 2007 Population Estimates, and Florida EDR County Profiles.

Educational Degrees and Programs granted in the United States

A wide variety of degrees are granted by various United States institutions each year. Information concerning the number of degrees by discipline is available from the U.S. Department of Education. The supply of individuals in the resource markets will depend on many factors, including salary and benefits, and desirability of specific occupations.

The number of bachelor's degrees granted, ranked by discipline division for Fall 2007, is provided in Table 7. Business, management, marketing, and hospitality, social sciences, education, health, arts, engineering, communication, biological and biomedical sciences, and English are some of the fields with the most degrees granted.

Table 8 provides a ranking of the master's degrees conferred by discipline division. The top ten degrees conferred included education, business, management, marketing, hospitality, health, engineering, public administration and social service, psychology, social sciences and history, computer and information sciences, arts, and biological and biomedical services.

The doctoral degrees granted in the Fall of 2007 ranked by discipline division are shown in Table 9. The top degrees granted included health care, education, engineering, biological and biomedical services, psychology, physical sciences, social sciences and history, business, management, marketing, and hospitality, computer and information services, and theology and religious vocations.

**Table 7: Bachelor's Degrees Conferred by U.S. Degree-Granting Institutions
Fall 2007 by Discipline Division and Sex**

	Discipline Division	Total	Males	Females
	All fields	1,524,092	649,570	874,522
1	Business, management, marketing & hospitality	327,531	166,350	161,181
2	Social sciences and history	164,183	82,417	81,766
3	Education	105,641	22,516	83,125
4	Health professions and related clinical sciences	101,810	14,325	87,485
5	Psychology	90,039	20,343	69,696
6	Visual and performing arts	85,186	32,729	52,457
7	Engineering and engineering technologies	82,072	68,230	13,842
8	Communication and communications technologies	78,420	29,009	49,411
9	Biological and biomedical sciences	75,151	29,951	45,200
10	English language and literature/letters	55,122	17,475	37,647
11	Liberal arts and sciences, general studies and humanities	44,255	14,123	30,132
12	Computer & information sciences & support services	42,170	34,342	7,828
13	Security and protective services	39,206	19,505	19,701
14	Multi/interdisciplinary studies	33,792	10,439	23,353
15	Parks, recreation, leisure, and fitness studies	27,430	14,190	13,240
16	Public administration and social service professions	23,147	4,354	18,793
17	Agriculture and natural resources	23,133	12,309	10,824
18	Family and consumer sciences/human sciences	21,400	2,594	18,806
19	Physical sciences and science technologies	21,073	12,455	8,618
20	Foreign languages, literatures, and linguistics	20,275	6,173	14,102
21	Mathematics and statistics	14,954	8,360	6,594
22	Philosophy and religious studies	11,969	7,430	4,539
23	Architecture and related services	9,717	5,393	4,324
24	Theology and religious vocations	8,696	5,761	2,935
25	Area, ethnic, cultural, and gender studies	8,194	2,572	5,622
26	Transportation and materials moving	5,657	5,043	614
27	Legal professions and studies	3,596	1,008	2,588
28	Military technologies	168	152	16
29	Library science	82	10	72
30	Precision production	23	12	11

SOURCE: U.S. Department of Education, National Center for Education Statistics, 2006-07 Integrated Postsecondary Education Data System (IPEDS), Fall 2007.

Table 8: Master's Degrees Conferred by U.S. Degree-Granting Institutions Fall 2007 by Discipline Division and Sex

		Total	Males	Females
	All fields	604,607	238,189	366,418
1	Education	176,572	40,164	136,408
2	Business, management, marketing, hospitality	150,211	84,115	66,096
3	Health professions and related clinical sciences	54,531	10,636	43,895
4	Engineering and engineering technologies	32,162	24,865	7,297
5	Public administration & social service professions	31,131	7,758	23,373
6	Psychology	21,037	4,265	16,772
7	Social sciences and history	17,665	8,577	9,088
8	Computer & information sciences & support services	16,232	11,985	4,247
9	Visual and performing arts	13,767	5,910	7,857
10	Biological and biomedical sciences	8,747	3,568	5,179
11	English language and literature/letters	8,742	2,867	5,875
12	Communication and communications technologies	7,272	2,485	4,787
13	Library science	6,767	1,309	5,458
14	Theology and religious vocations	6,446	3,909	2,537
15	Architecture and related services	5,951	3,304	2,647
16	Physical sciences and science technologies	5,839	3,556	2,283
17	Security and protective services	4,906	2,315	2,591
18	Mathematics and statistics	4,884	2,859	2,025
19	Multi/interdisciplinary studies	4,762	1,703	3,059
20	Agriculture and natural resources	4,623	2,174	2,449
21	Legal professions and studies	4,486	2,335	2,151
22	Parks, recreation, leisure, and fitness studies	4,110	2,116	1,994
23	Liberal arts & sciences, general studies & humanities	3,634	1,352	2,282
24	Foreign languages, literatures, and linguistics	3,443	1,058	2,385
25	Family and consumer sciences/human sciences	2,080	292	1,788
26	Philosophy and religious studies	1,716	1,087	629
27	Area, ethnic, cultural, and gender studies	1,699	617	1,082
28	Transportation and materials moving	985	828	157
29	Military technologies	202	178	24
30	Precision production	5	2	3

SOURCE: U.S. Department of Education, National Center for Education Statistics, 2006-07 Integrated Postsecondary Education Data System (IPEDS), Fall 2007.

**Table 9: Doctor's Degrees Conferred by U.S. Degree-Granting Institutions Fall
2007 by Discipline Division and Sex**

		Total	Males	Females
	All fields	60,616	30,251	30,365
1	Health professions and related clinical sciences	8,355	2,242	6,113
2	Education	8,261	2,681	5,580
3	Engineering and engineering technologies	8,123	6,422	1,701
4	Biological and biomedical sciences	6,354	3,221	3,133
5	Psychology	5,153	1,382	3,771
6	Physical sciences and science technologies	4,846	3,317	1,529
7	Social sciences and history	3,844	2,110	1,734
8	Business, management, marketing, hospitality	2,029	1,188	841
9	Computer & information sciences & support services	1,595	1,267	328
10	Theology and religious vocations	1,573	1,227	346
11	Visual and performing arts	1,364	625	739
12	Mathematics and statistics	1,351	949	402
13	Agriculture and natural resources	1,272	768	504
14	English language and literature/letters	1,178	478	700
15	Multi/interdisciplinary studies	1,093	485	608
16	Foreign languages, literatures, and linguistics	1,059	437	622
17	Public administration & social service professions	726	253	473
18	Philosophy and religious studies	637	453	184
19	Communication and communications technologies	480	188	292
20	Family and consumer sciences/human sciences	337	73	264
21	Area, ethnic, cultural, and gender studies	233	95	138
22	Parks, recreation, leisure, and fitness studies	218	109	109
23	Architecture and related services	178	104	74
24	Legal professions and studies	143	78	65
25	Security and protective services	85	43	42
26	Liberal arts & sciences, general studies & humanities	77	38	39
27	Library science	52	18	34
28	Military technologies	0	0	0
29	Precision production	0	0	0
30	Transportation and materials moving	0	0	0

SOURCE: U.S. Department of Education, National Center for Education Statistics, 2006-07 Integrated Postsecondary Education Data System (IPEDS), Fall 2007.

Regional Educational Institutions

The Southwest Florida region has historically been an area of very fast population growth during the years leading up to the current recession. This area is expected to have slower population and economic growth in the long run after the financial and housing markets have had a few years to adjust and return to more normal operations and growth.

The demand for higher education is expected to rise and there are various established institutions along with some new educational institutions offering educational services in the Southwest Florida region. This section will describe each of the existing institutions and, if possible, provides information on their strategic initiatives.

Ave Maria University

A Catholic university located in Collier County opened in August 2003, at an interim campus in Naples for its first academic year with 100 undergraduate students. In August of 2008, Ave Maria University welcomed more than 589 undergraduate students from 50 states and 29 countries, as well as some 61 faculty.

Ave Maria University's mission statement is:

The University takes as its mission the sponsorship of a liberal arts education curriculum dedicated, as articulated in the apostolic constitution Ex Corde Ecclesiae, to the advancement of human culture, the promotion of dialogue between faith and reason, the formation of men and women in the intellectual and moral virtues of the Catholic faith, and to the development of professional and pre-professional programs in response to local and societal needs.

The university offers the following undergraduate majors:

- Biology & Chemistry
- Classics & Early Christian Literature
- Economics
- History
- Literature
- Mathematics & Physics
- Music
- Philosophy
- Politics
- Theology

as well as graduate degrees in Theology and is now offering a law degree as well.

Barry University

Barry University is a private Catholic institution that engages the multi-cultural and multi-national communities of greater Miami, Florida, Caribbean, and Latin American markets. Their main campus is located in Miami Shores and serves approximately 3,000 undergraduates and 2,600 graduate students.

Overall enrollment is approximately 8,500 with about 2,000 working professionals attending classes at various sites across Florida. The university has a law school in Orlando that serves approximately 750 students.

The Barry University School of Adult and Continuing Education (ACE) has 27 Florida locations. They have two locations in Southwest Florida. Barry University, SWFL is located in the Gorovoy Building at 12381 S. Cleveland Avenue, Suite 502, Fort Myers, Florida 33907. The other location is at Edison State College in Naples.

The mission of Barry University's ACE is:

The purpose of the Frank J. Rooney School of Adult and Continuing Education is to provide adult students with undergraduate/graduate credit, non-credit, and certificate programs which recognize the educational needs of adult learner and promote life-long learning.

Its website states that the:

The school seeks to attract a diverse student body and to show a caring attitude toward each student regardless of individual backgrounds. Recognizing the breadth of experience of adults, course offerings afford opportunities for further exploration of truth within the Judeo-Christian and Dominican tradition.

The Barry University ACE school offers accelerated degree programs. The fall and Spring semesters are divided into two, eight- week sessions. Students can register for classes in August, October, January, March, and June. Classes meet for four hours once a week. You can receive college credit for experiential learning.

The program offers the following programs in Fort Myers:

- Administration, BS, BPS
- Administration, MA
- Behavioral Sciences, BLS
- Human Resources, Post-Baccalaureate Certificate
- Human Resources Specialization, BPS
- Psychology, BLS
- Public Administration, Post-Baccalaureate Certificate
- Public Administration, BPA, BPS
- Public Administration, MPA

The Naples location offers a slightly smaller number of programs including:

- Administration, BS, BPS
- Administration, MA
- Health Services Administration, BS, BPS
- Human Resources Specialization, BPS
- Psychology, BLS
- Public Administration, BPA, BPS
- Public Administration, MPA

In addition, Barry University's Adrian Dominican School of Education offers the following degrees in Lee County:

- Educational Leadership (Ed.S.), Prepares school administrators for K-12 schools; DOE-approved for certification in educational leadership at the MS level.
- Educational Leadership (MS), Prepares school administrators for K-12 schools; DOE-approved for certification in educational leadership at the MS level.
- Educational Leadership without certification (Ed.S.)
- Educational Leadership without certification (MS)

Edison State College

Edison State College began admitting students in the fall of 1962 as Edison Community College and now offers both associate and baccalaureate degrees. It has campuses in Lee, Collier, and Charlotte Counties and provide services to students in Hendry and Glades Counties. The college has approximately 340 professional and support staff members that provide full-time instructional and support services for more than 15,000 credit and nearly 3,000 non-credit students. The college offers the following bachelor degree programs:

- BAS in Public Safety Administration
- BS in Secondary Biology Education
- BS in Secondary Mathematics Education
- BS in Elementary Education
- BS in Nursing
- BAS in Supervision and Management

The associate degree programs include:

- General Education Program
- Accounting Technology
- Business Administration and Management
- Cardiovascular Technology
- Computer Programming and Analysis
- Crime Scene Technology

- Criminal Justice Technology
- Dental Hygiene
- Drafting and Design Technology
- Early Childhood Education
- Emergency Medical Services Technology
- Fire Science Technology
- Health Information Management
- Internet Services Technology
- Networking Services Technology
- Nursing Program
- Opticianry Program
- Paralegal Studies
- Physical Therapist Assistant Program
- Radiologic Technology
- Respiratory Care

Edison State College offers the following certificate programs;

- Accounting Applications
- Computer Programming and Applications Specialist
- Crime Scene Technology
- Emergency Medical Technician
- Eye Care Technician
- Firefighter Program
- Networking Specialist
- Ophthalmic Laboratory Technician
- Paramedic
- Small Business Management
- Visual Assessment

The strategic initiatives of Edison State College are provided below:

New Initiatives

1. Lead the College in the transformation to a State College, serving students through a variety of baccalaureate degree opportunities.
2. Establish an active Alumni Association dedicated to encouraging graduates to support the College's mission to change lives for the better.
3. Celebrate the 50th Anniversary of the College's founding with a 2012 Golden Jubilee.
4. Develop and define a partnership with Florida Gulf Coast University, to best utilize the facilities and services of the Charlotte Campus of Edison State College.
5. Provide for Student Housing as needed, across the district, for those who seek a residential campus experience at affordable prices.

Enhancing Opportunities for Students

1. Create an Alliance for Scholarship Giving comprised of educational leaders and non-profit foundations committed to ensuring that no eligible student is denied a college education due to inability to pay.
2. Through community partnerships, expand the HOPE Scholar Program, providing encouragement to all those who might not otherwise have an opportunity to attend college.
3. Establish Charter High Schools, Honors Academies and other educational opportunities for college-bound high school students across the district.
4. Enhance access to baccalaureate programs in the areas of education, health care, and supervision and management.
5. Cultivate partnerships with the five area K-12 districts creating educational pathways for students through attainment of baccalaureate/graduate degrees.
6. Develop student success programs to include a Collegiate Preparatory Institute, First Year Experience Course, and supplemental instruction for several disciplines.
7. Create international education opportunities for students and faculty both at Edison State College and abroad.

Cultural Enrichment

1. Increase the College's role in cultural leadership. Designate the Lee Campus' cultural resources, including the Barbara B. Mann Performing Arts Hall, the Rauschenberg Gallery and the Richard H. Rush Library and exhibit space for art and antiquities, as a Cultural Center, open to the public for purposes of study, education and enjoyment.
2. Create a museum on the Lee Campus, with both visiting and permanent collections, to include works by contemporary and modern artists as well as art, antiquities and articles of historic significance and interest.
3. Internationalize the curriculum and student body, bringing an appreciation for the cultural and ethnic differences that make up the rich social fabric of the United States.
4. Expand the diversity of students and programs in keeping with changing regional demographics.

Facilities

1. Build a new Teaching and Learning Center on the Lee Campus.
2. Construct a Nursing building on the Lee Campus, with a medical museum and technologically advanced learning laboratories.
3. Expand the District's services by breaking ground for the Curtis Campus in Labelle.
4. At the Collier Campus, build a Health Sciences Hall, an Early Childhood Development Center and, in partnership with the University of Florida, a pediatric dental clinic.
5. Pursue a Charlotte County Regional Library on the Charlotte Campus.
6. Establish a Cultural Park at the Charlotte Campus.
7. Acquire additional land for future development.

Economic and Regional Development

1. Increase the College's role in economic development and service to the area by assisting in the implementation of regional economic development.
2. Increase financial assets held in the Edison State College Foundation to provide the resources and scholarship funding necessary to implement the College's strategic goals and objectives.

Hodges University

The university was founded in 1990 as International College and changed its name to Hodges University in 2007. The private university has approximately 2,100 students and has the following characteristics:

- 70 percent full-time students
- Average age of 32
- 70 percent female
- 30 percent Hispanic
- 16 percent African-American
- Average class size of 15 students
- 75 percent of classes taught by full-time faculty
- 64 full-time faculty and 48 adjunct faculty.

The university has a campus in Fort Myers and Naples and offers the following academic programs:

- 12 associate degrees
- 12 bachelor's degrees
- 8 graduate degrees
- 17 online degrees
- English as a second language
- Lifelong learning classes at the Frances Pew Hayes Center for Lifelong Learning

The university has four schools that define their focus including the Kenneth Oscar Johnson School of Business, School of Allied Health, School of Professional Studies, and the School of Technology. The university has learning sites at the following locations:

- Immokalee Learning Site in the Jubilation Community
- University Centers of Edison State College in Lee and Charlotte counties
- Pasco-Hernando Community College in New Port Richey, Brooksville and Dade City
- Florida Keys Community College
- South Florida Community College

Hodges University offers the English as a Second Language (ESL) program that provides English language immersion to non-native speakers of English.

IMPAC University

IMPAC University is a private for-profit graduate university offering Programs in business, behavioral science, and technology. Their central focus in all programs is the linkage of academic learning with real life business goals and strategies. The university website lists 16 faculty and seeks to offer innovative, creative, and custom-designed education and training. The university's website states that:

The University's main campus occupies a 60,000 square foot modern facility in the city of Punta Gorda, Florida. The campus is a fully modern training facility reflecting a holistic approach to education. Facilities include several classrooms, a large auditorium, computer support, a research library, formal presentation rooms, and athletic facilities consisting of racquetball, basketball, and volleyball courts, swimming pool and workout rooms. The campus has the resources to accommodate a variety of class sizes. The campus is located on the historic Peace River, within walking distance of the Fishermen's Village.

Nova Southeastern University (NSU)

NSU states that it is "the nation's sixth largest, not-for-profit, independent university, with more than 28,000 students and 103,000 alumni; a sprawling, 300-acre Fort Lauderdale-Davie campus; and a presence in nine countries around the world. Through five decades of explosive growth, our reputation for academic excellence and innovation continues to flourish."

They have student education centers in Nassau (Bahamas), Fort Myers, Jacksonville, Miami, Miramar, Orlando, Tampa, and West Palm Beach. These centers offer students a place to meet for weekend and evening classes, access computer labs and video conferencing, meet with classmates, and view compressed video classes at a time convenient to the student. In addition the educational centers offer assistance with registration. Their website video states that students can take classes at the main campus, at home(online), or at one of the educational centers.

NSU offers a variety of courses aimed at an existing workforce that wants to continue their education. The degrees offered at the Fort Myers Educational Center are shown in Table 2.

Table 10:Degrees Offered at the NSU Fort Myers Educational Center

Discipline	Bachelors	Masters	Doctor
Criminal Justice		X	
Cross-Disciplinary Studies		X	
Education	X	X	X
Information Technology		X	
Leadership/Education		X	
Mental Health Counseling		X	
Nursing		X	
Physician Assistant Program		X	
Speech Language Pathology		X	
Health Science	X		
Nursing	X		

Source: <http://www.nova.edu/sec/fortmyers/index.html>, September 12, 2009

Rasmussen College

The Rasmussen College website states that, "Founded in 1900, Rasmussen College is a premier provider of online educational experiences, delivering regionally accredited Bachelor's, Master's, Doctoral, and Associate's degree programs through its network of 17 Rasmussen College campuses and partnerships with leading universities. Rasmussen is an institution of higher learning dedicated to the growth and development of its students, employees, and the communities it serves. With more than 12,000 students, Rasmussen is able to offer its students a broad range of quality programs focused on the areas with the greatest occupation opportunities." Rasmussen has a National Online Division, seven Minnesota campuses, two Wisconsin campuses, three Illinois campuses, two North Dakota campuses, and three Florida campuses including Fort Myers, Pasco County, and Ocala. Rasmussen College has the following schools:

- School of Allied Health
- School of Business
- School of Education
- School of Justice Studies
- School of Nursing
- School of Technology and Design

The mission for the college is: " To be the premier provider of online educational experiences delivering Bachelors, Associates and Advanced degree programs through its network of online and local community campuses." The college partners with Deltak.edu to assist and support the online or distance learning experience.

Southwest Florida College

Southwest Florida College is a private, non-profit college with campus locations in Tampa, Fort Myers, Port Charlotte and within the International Design Center in Estero. Their website includes the following history for the college:

Southwest Florida College was founded in 1974 as the Lehigh School of Business. The name was changed in 1982 to the Fort Myers Business Academy. On June 29, 1995 the school was acquired by the International College Foundation, Inc., of Largo, Florida – a 54 year old private non-profit higher education management company. Junior college accreditation was granted by ACICS on April 25, 1997 and the college received approval for its first branch campus in Tampa in the spring of 2000. International College Foundation, Inc., officially became Compass Rose Foundation, Inc. on January 3, 2002. Southwest Florida College was granted Senior College status in December, 2005, and began offering bachelor's degrees shortly thereafter.

The college offers associate degrees, diplomas or certificates in:

- Accounting
- Computer Aided Drafting and Design
- Computer Animation/Multimedia
- Computer Programming & Database Management
- Criminal Justice
- Digital Design
- Early Childhood Education
- Health Information Technology
- Interior Design & Decorating, Kitchen & Bath
- Management and Marketing
- Massage Therapy
- Medical Assistant
- Medical Billing & Coding Technology
- Network Engineering & Administration
- Online Paralegal Studies
- Surgical Technician
- Web Design & Development
- Crime Scene Investigation
- Early Childhood Care and Management.

Bachelor of Science degrees are offered in:

- Criminal Justice
- Early Childhood Education
- Elementary Education
- Interior Design
- Health Care Administration
- Management.

State University System of Florida (SUS)

The State University System of Florida includes 11 institutions including

- Florida Agricultural and Mechanical University (FAMU), Tallahassee
- Florida Atlantic University (FAU), Boca Raton
- Florida Gulf Coast University (FGCU), Fort Myers
- Florida International University (FIU), Miami
- Florida State University (FSU), Tallahassee
- New College of Florida (NCF), Sarasota
- University of Central Florida, (UCF), Orlando
- University of Florida (UF), Gainesville
- University of North Florida (UNF), Jacksonville
- University of South Florida (USF), Tampa
- University of West Florida (UWF), Pensacola

The following goals and objectives of the SUS Strategic Plan will be addressed in the 2009-2010 legislative budget request:

1. Access to and production of degrees
2. Meeting statewide professional and workforce needs
3. Building world-class academic programs and research capacity
4. Meeting community needs and fulfilling unique institutional missions

The SUS mission statement is:

To mobilize resources and diverse constituencies to govern and advance the State University System of Florida

and the SUS values are:

To support and advocate for high-quality teaching, research and public service, we are committed to:

- creativity, discovery and innovation
- student access, learning and success in the global community and marketplace
- collaboration, respect and appreciation of diversity
- transparency, shared responsibility and continuous improvement

Table 11: Enrollment by SUS Institution, Fall 2008

Headcount Enrollment by University and Level, for Fall 2008				
University	Undergrad	Grad	Unclass	Total
UF	34,191	16,127	1,533	51,851
FSU	29,584	8,376	1,112	39,072
FAMU	9,710	1,949	189	11,848
USF	35,120	9,149	2,063	46,332
FAU	21,025	3,887	2,109	27,021
UWF	8,405	1,395	716	10,516
UCF	42,664	6,593	1,018	50,275
FIU	30,428	6,629	2,089	39,146
UNF	13,199	1,781	447	15,427
FGCU	8,659	986	593	10,238
NCF	787	0	0	787
SUS	233,772	56,872	11,869	302,513

Source: <http://www.flbog.org/aboutsus/universities/>

Table 12: Top Ten Undergraduate Majors, Fall 2008

Top Ten Undergraduate Majors by Enrollment, Fall 2008	
Major	Enrollment
Business and Management	57,935
Health Professions & Rel. Sci.	31,007
Education	27,383
Engineering	22,667
Social Sciences	20,119
Biomedical Sciences	18,955
Psychology	14,496
Mass Communications	12,781
Visual and Performing Arts	10,745
Liberal/General Studies	10,430

Source: <http://www.flbog.org/aboutsus/universities/>

Summary

The external environmental scan has explored a wide range of economic and demographic variables including an economic outlook, occupational and industry trends, population projections, demographic trends, educational attainment, economic and workforce studies, college degrees conferred and regional and State University System missions and plans.

Florida and Southwest Florida will experience a slow and gradual recovery from the worst recession since the great depression of the 1930s. The demand for higher education has increased as students find fewer employment opportunities. Colleges and universities are expanding their degree programs and many are offering online degree programs. Florida Gulf Coast University is well positioned to continue its growth and add value to the region and the state.

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