2010 Environmental Scan
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Introduction

Environmental scanning is an essential component of the district strategic planning process. The purpose of environmental scanning is to anticipate and plan for the opportunities and challenges that the system will face in the future. The results of environmental scanning are shared across the system and planners consider the information as they revise and update their strategic plans.

The environmental scanning process is collaborative and ongoing. Individuals identify significant trends or events that could impact the Maricopa Community College District throughout the year and post the information on a website. During the past year, more than one hundred and fifty postings were made on the environmental scanning wiki. Key trends and implications for the system were identified in the following areas: economic and workforce trends; educational trends; trends relating to external stakeholders and partnerships; political and legislative trends; and social and technological trends.

In April 2010, at the culmination of the annual scanning cycle, an environmental scanning summit was held. More than fifty individuals, in a variety of roles from across the system, helped identify and synthesize the key trends and implications for the Maricopa system. The major trends identified by the summit participants are presented in the summary that follows.

Environmental Scanning Summit Summary – Key Trends

Economic uncertainty and changing workforce needs

In the current economic climate, higher education is being challenged to meet increasing student demand. It is anticipated that increased demand will lead to capacity issues in higher education nationwide. In Maricopa, a similar trend in enrollment has been apparent and strategies to accommodate growth have been employed.

The types of jobs awaiting future graduates and the workforce skills needed are changing due to innovation and the shifts in marketplace demand. For example, green initiatives are expected to stimulate new businesses and opportunities.

The global economy is expected to have an impact on the US economy and upon the composition of the workforce of the future. As Timothy Geithner, the US Treasury Secretary, noted at a meeting of the International Monetary Fund in April, “globalization transmits trouble with enormous speed and force, affecting economies around the world - the relatively strong as well as the more vulnerable.” International competition for resources and for jobs is anticipated to accelerate in the global economy.
Rapid advent of new technologies

New technologies, such as the use of large clusters of networked servers (cloud computing), will be used to centralize applications. This technology will improve access, lower software costs, and improve processing power and storage capacity.iii

In the future, higher education will be affected by decisions concerning “net neutrality”, the concept of keeping the internet open for all legitimate uses. In May 2010, the Federal Communications Commission proposed that the transmission component of broadband access service be regulated. Decisions are pending which could potentially increase prices for larger community colleges for broadband service or place further regulation on access to broadband services.iv

Students will expect a wide array of technology tools, delivery mechanisms and alternative content in the future. It is anticipated that open course resources will be more prevalent. New applications, such as Web 2.0, will allow faculty to create and modify web content and will allow multiple devices to interact.v

Increased reliance upon partnerships

The role of the community colleges as a bridge to the community is expected to increase. There are many new partnerships emerging. The Gates Foundation and Lumina Foundation, among others, are investing heavily in higher education initiatives designed to increase the number of students completing a college education. The Arizona Productivity Improvement Imperative is one statewide initiative with the goal of increasing completion and degree attainment through a concerted effort of all educational institutions in the State. The P-20 council is again active and will help coordinate efforts.

External funding will be accompanied by more accountability. The Voluntary System of Accountability is one such endeavor. Funded by the Gates Foundation and the Lumina Foundation for Education, the goal is to develop “reasonable ways to judge institutional success.”vi

Many of the partnerships with public entities will become more important to struggling communities. The loss of funding in the public sector will highlight the importance of the community college in supporting community needs. Partnerships such as the “Communiversity”, where multiple educational providers and municipalities share facilities and centralize student offerings, will become more prevalent. Many such partnerships are emerging in Arizona.

Diversity in social characteristics and demographic attributes of students

The rapid influx of a wide variety of students into community colleges will increase student diversity. Current economic conditions will provide the impetus for many students to enter or re-enter the community college. New students will bring a wide range of preparation, backgrounds and expectations. Students will include, among others, displaced workers seeking to re-career, returning veteransvii, recent high school graduates, students needing developmental coursework, students seeking advanced placement and older individuals seeking personal interest courses.
The millennial generation (ages 18-29) differentiates itself from prior generations in the use of social media (e.g. Facebook, blogs, and wiki’s.) Other lifestyle differences that are emerging include changes in work ethic and the resurgence of multigenerational families. viii

Demographic shifts that will impact education include increased ethnic diversity and the aging of the population. It is anticipated that whites will become a minority by 2050. Trends in educational attainment indicate that the share of the population who have obtained a baccalaureate degree has fallen. The share of 25-34 year olds with a baccalaureate degree is lower than the share of 35-44 year olds with a degree.ix

Federal and State higher education policies, accountability and funding

Legislative and political issues will be critical to future strategic planning efforts. State and national trends that may affect both secondary and post-secondary education include continued budget cuts, immigration policy, changes in federal aid, and an increased emphasis on higher education outcomes.

The state budget crisis continues to negatively affect the community colleges with continued budget cuts to education. There are national initiatives underway to encourage college completion and to increase federal aid availability. New Arizona legislation will allow early high school graduation and entry into community college and this may increase demand. These initiatives may create even more enrollments in the community colleges at the same time that budget cuts will result in fewer resources to support student learning. Federal funding for the development of longitudinal data systems will increase the support for coordination between educational entities and the development of accountability measures.

Educational trends

The composition of the faculty is changing due to increased demand and decreased funding. There are relatively more adjuncts currently teaching. This trend is anticipated to continue in the near future.

The changes in student population and workforce needs will call for new curriculum development in order to remain relevant. Course competencies and outlines will need to be reviewed in the future. In addition, textbooks will be offered in a variety of formats and with the potential for open access. Portable, flexible, real-time course content will be developed.

Articulation agreements will be increasingly important. Creating pathways for students that are clear through academic planning and agreements between institutions will continue to evolve in the future.

Possible implications for Maricopa

The future as envisioned by the environmental scanning participants is one of uncertainty but also opportunity. The need to prepare students for lifetime employability in an increasingly competitive global economy was mentioned by many participants. Changes in student expectations and student characteristics, in the midst of the economic downturn, challenge the
community colleges to “be responsive to the evolving learner.” The call for establishing strategic priorities and being flexible and creative in order to meet the needs of students in the future was discussed by many participants.

Changes in technology will influence how students interact and how colleges teach in the future. New tools will increase flexibility and innovation but will require strategies to ensure that students are engaged and supported in the virtual environment. Curriculum and pedagogy will need to be developed to use these new technologies. Access to open-source materials and the legal definition of who will have control of internet access are critical issues to be resolved. The need to engage students and stay competitive in the educational market was mentioned by many participants.

Further, partnerships and coordination between educational, community and business partners will become more important as colleges face the challenge of providing access to higher education for an increasing number of students. The current economic climate will cause more reliance on partnerships between community colleges and community entities. The community will also demand accountability and information about student outcomes. Strategic thinking and environmental scanning will keep the community colleges responsive to community needs.

Political and legislative issues are critical to the future of education. The need to monitor and participate in national policy debates to help shape the agenda for higher education was pointed out by the participants. The colleges are important in providing a forum for debate and discussions of critical issues. The participants recognized an incongruity between the national goals set for higher education and the realities of state funding for higher education and pointed out the need to stay informed and aware of legislative changes.

New strategies will be needed to help students meet their educational goals. Many students will be focused on career goals and affordability will be an issue for many. The summit participants highlighted the need to collaborate with other educational entities in order to improve pathways for students and ensure their success. They also noted that student use of social media may impact pedagogy. Further, serving the needs of the increasingly diverse student population will be challenging. In addition, the participants recognized that support for the adjunct faculty will be increasingly important. The participants in the summit suggest that this will provide opportunities for full-time faculty to become master teachers as well as content experts.
Sources


Economy and Workforce Trends
Contributed by Mary Day, Director Research, Planning and Development, Chandler-Gilbert Community College

The Great Recession:
The current recession has come to be called the Great Recession, since it is the deepest and longest since the depression of the 1930’s. There are high rates of unemployment, high rates of underemployment, high rates of long term unemployment, a high rate of jobs lost forever, and most likely it will take an extended period for the economy to recover. While the economy is expanding (technically the recession is over), world events could send it back into reverse again.

Since the recession began, 8.2 million jobs were lost. Roughly one out of five Americans is either unemployed or underemployed – about 10% are unemployed and another 10% are underemployed. Long term unemployment – at 4.3% of the labor force – is the highest it has ever been (long term unemployment is defined as being unemployed for six months or longer; while the tabulation of this statistic began in 1948). Unlike other recessions, a significant proportion of jobs were not only lost, but they were lost for good and will not return.

Unemployment is a “lagging indicator.” When there is a downturn in the economy, employers delay laying staff off; when it turns around, employers delay hiring until the economy seems stable. Economists predict there will be increases in employment toward the end of 2010 and there are signs that job creation is taking place. However, since a significant number of jobs were lost and will not return, some forecasts project that the recovery will take about five years.

The European debt crisis – the bankruptcy of Greece, and the potential for Portugal and Spain to follow – has the potential to send world economies into another downward spiral. Greece (and others) could default on a very high debt load owed to European banks. Similar to the mortgage crisis that initiated the Great Recession; this has the potential to affect the American economy as world economies are increasingly linked.

Arizona:
Arizona has been hit particularly hard by the recession because it is overly dependent on a few industries: construction, retail sales, and high tech manufacturing. About 70% of jobs are in: services—38%, retail and wholesale trade—16%; construction—9%; and manufacturing—7%. These areas have seen particularly severe job losses. A range of studies, commissions, and business coalitions have addressed the weaknesses in Arizona’s economic base and pointed out that it is not sustainable. The actual implementation of recommendations to diversify the economy and create high-end jobs has been very slow. There are a few bright spots, the investment in biotechnology, for example.

This initiative will particularly challenge Arizona. In education alone, by 2018 it is estimated that 63% of all jobs will require some form of post-secondary education or credential. To meet this goal Arizona needs to double college graduates by 2020; and at current rates Arizona will fall short by 220,000 people. Arizona has fallen backward; in 1990, it ranked 20th among states in the percentage of population holding degrees; by 2000 it had fallen to 37th, and the 2010...
Census figures are not complete. Other states have workforces with more education and in more industries, which gives them an advantage in attracting additional employers. This increases Arizona’s difficulty in creating a more sustainable and broad-based economy.

**Implications:**

The primary implication is that there will be significantly increased demand for higher education at the same time as there are significantly reduced resources. More students are attending college; more are selecting community colleges; workforce training is needed for people who have lost jobs; and students will stay in community colleges longer. The recession has severely reduced revenues, and this will persist for several years if the economic recovery is slow.

Nationally, 70% of 2009 high school graduates attended college in fall 2009. This is the highest percent of students in any high school class to do so. A disproportionate percentage selected community colleges because of cost. In Maricopa, fall enrollment was up by 11,488 students, with an increase in FTSE of 5,956 or 11.5%. This is the equivalent of adding a medium to large size college in a single year.

For those individuals who lost jobs and those in jobs that are not likely to come back, retraining is essential. This is also a mission that community colleges have traditionally played. However, jobs after the recession will look different and require different skill sets. This will necessitate changes in curriculum, delivery, new technologies, and a response to unforeseeable needs.

Students will also stay in community colleges longer. Costs will mean that students will stay two years, instead of transferring after their first year. Arizona public universities have changed transfer admission requirements. Students, who did not meet the initial university admission requirements, when they finished high school, will be required to complete an Arizona General Education Certificate (AGEC), with a higher GPA, before transferring. Research has shown that this will increase student success at the university.

Reduced business activity and unemployment have led to sharply reduced revenues at all levels of government, with significant budget cuts. If the recovery is slow and it takes five years for the economy to generate jobs at the pre-recession levels, budgets could be seriously restrained for an extended period of time. Even though Arizona passed the one-cent additional sales tax, this merely ameliorates deeper cuts. It is not, nor was it intended to be, a permanent solution.

Finally, if Arizona is to create a more sustainable economy, it must develop high end jobs in more than just construction and retail sales. Finding money for those investments, just in education, may be very difficult given current budget constraints. And, failing to do so, will cast a long shadow over the state’s future.
Higher Education Partnerships Trends

Contributed by Damita Kaloostian, Director Institutional Advancement, South Mountain Community College

As a result of increasing enrollment and decreasing financial resources, higher education is experiencing considerable changes in the dynamics of both internal and external partnerships. According to Ken Kay, President of the Partnership for 21st Century Skills, higher education is having an “a-ha” moment as the dialogue improves between K-12 institutions, postsecondary organizations, government, business and public agencies.

Today, more than ever, community colleges are being viewed as a bridge for many existing and new partnerships. The various roles that community colleges have traditionally played in serving the community has established a unique platform to bring multiple organizations together to develop collaborative strategies and accomplish similar goals. Without question, “community colleges are strengthening the connections with K-12, other higher education institutions, and public agencies by enriching the education pipeline and bolstering the economy.”

The changing dynamics of community college partnerships also means greater accountability. Stakeholders, including community colleges, are coming together to improve links with education, workforce and the community in order to better prepare students. Greater accountability within higher education partnerships will ultimately create streamlined systems, clearly defined career paths, reduction of duplicate efforts, maximization of expertise, and overall cost savings.

Postsecondary institutions also continue to focus on student success and develop new partnerships aimed at streamlining university transfer such as the “Communiversity” which intends to offer the best of both the community college and the university. The “Communiversity” is a partnership of three Maricopa Community Colleges and as many as five universities, Rio Salado, Glendale and Phoenix community colleges will join with four-year universities to bring education to students instead of having students travel to their campuses. When students earn an associate degree, they will not have to transfer to a four-year campus hoping that most of their credits will be accepted. Instead, the student will continue on a path that could lead to a master’s degree, even if more than one college is involved.

Organizations who anticipate the changing environment will be better prepared and more responsive to community needs. Community colleges are in a unique position to strengthen existing partnerships by bringing new stakeholders to the process. Community colleges will also serve as a key facilitator in new partnerships that involve stakeholders with similar interests and limited resources. Ultimately, community colleges will play an important role in shaping and redefining the dynamics of many partnerships in higher education.
Sources


Social and Technological Trends

Contributed by Dr. Rene Willekens, Dean Planning, Research and Effectiveness and Dr. Jann Contento, Coordinator Student Success Programs, Estrella Mountain Community College

The economic downturn (i.e., housing foreclosures, higher unemployment rates) has impacted the demographic composition of the United States – leading to more multi-generational households. In 2008 a record 49 million Americans (16.1% of U.S. population) lived in multi-generational households, up from 28 million (12.1%) in 1980. The impacts of the new federal health care package enables parents to retain students on their health care plans until age 26, without the requirement of attending school full-time. The package also imposes more-stringent payout requirements on large health care plans, including those offered on campuses. These changes may alter college going motives and potentially impact community college offerings and delivery methods.

The recession has been particularly tough on those recent college graduates entering the job market. Employment opportunities for students graduating with occupational training and vocational certification continue to change. Many traditional programs and degrees, including those in the liberal arts, are experiencing transition. Recent college graduates are discovering fewer employment opportunities in fields once in high demand. Alterations in career paths, delayed initial employment for college graduates, and high student financial aid debt loads are influencing graduate school enrollments.

The appropriate role of social media in communicating with current and prospective students is being examined by colleges and universities. The popularity of “Facebook” and other social media may play an important role in college-admissions recruitment. In 2008, 41% of admission offices kept blogs and 61% maintained social-networking profiles. Social media’s use as a preferred communication method may also maintain a position in higher education.

National financial support is providing stimulus to the renewable energy sector. Federal government stimulus packages place nearly $20 billion into “greening” the economy. The pronounced goal to double the supply of renewable energy in three years calls for a new class of trained workers in environmental fields. Green jobs training programs will receive $500 million from the stimulus. Targeted federal monies have also encouraged a greater number of students to enroll in community college/business partnership programs that promise training in “green” jobs. In addition, Arizona’s State Fiscal Stabilization Fund (SFSF) includes: “college and career ready” standards and high-quality, valid, reliable assessments of all students. Arizona’s share of this fund, dedicated to support state education budgets, is estimated at $860 million, but is scheduled to end next year.

A growing body of research indicates that hybrid class formats provide greater benefits. Noted hybrid course benefits included flexibility and accessibility and availability of online tools (such as e-books, textbook videos, instructor videos, tutorials, and practice exams). Student success measures applied to online/hybrid instructional modalities, and resulting evidence should be continuously monitored as one measure of teaching and learning effectiveness.
Sources


Teaching and Learning

Contributed by Dr. David Roberto Morales, Instructional Designer, MCCCD Center for Learning and Instruction

The increasing number of adjunct instructors, veterans returning to college, adult students returning to college for re-training or to start new careers, students transferring to 4-year institutions, and the economy are all driving forces impacting teaching and learning.

The number of adjunct instructors teaching at the community college level is increasing. The National Center for Educational Statistics (2010) used data from fall 2003 to look at the number of faculty by appointment and reported that more than 60% of community college faculty were appointed part-time. Similar to national trends, Maricopa Community Colleges is experiencing an increase in the number of part-time or adjunct instructors. The Maricopa Community Colleges District Office website (2010) indicates that 4,358 adjunct faculty teach within the community college system. As the number of adjunct instructors teaching at post secondary institutions increases nationwide and within Maricopa, so does the need to provide faculty development opportunities and support to adjunct instructors.

The United States Department of Veterans Affairs (2009), using data from 2008, indicated that there were 23.4 million veterans in the United States. In addition, 540,000 veterans nationwide, including 32,020 veterans located within Arizona, utilized the educational benefits of the GI Bill. Faculty within Maricopa needs to be prepared to meet the needs of the veterans returning to the college classroom.

Radford (2009) examined national data in addition to other data sources to compare the GI Bills that have been implemented and to study the participation and experiences of veterans entering higher education. The report indicated that veterans returning to the classroom may have difficulty securing financial resources to attend college, transitioning from military life to civilian and student life, balancing family responsibilities with student responsibilities, communicating with faculty, and navigating the process for receiving benefits for veterans. The findings indicated an increase in the number of veterans returning to higher education, an increase in the number of veterans enrolling as full-time students, and an increase in the need for colleges to highly publicize benefits for veterans.

The current economic state has led to an increased number of adult learners returning to college to update their skills, re-train, or start a new career path. Returning adults enter the classroom with experiences from their professional and personal lives. This trend increases the demand on faculty to be able to meet the needs of the returning adults.

The number of students transferring to 4-year colleges is increasing. The Center for Community College Students Engagement (2009) indicated that 51% of the 400,000 students, who responded to a survey from one of 723 higher education institutions, listed transferring to a 4-year college or university as a primary goal.
The number of students transferring from Maricopa to a 4-year university within Arizona is expected to increase. The number of transfer students earning bachelor degrees is expected to increase. Faculty are central to the transfer culture (Smith, Miller, Bermeo, 2009). The economy and budget cuts have resulted in most universities strategically merging colleges and departments. The changing landscape has raised a need for stable articulation with universities.

In summary, the need to provide faculty development opportunities and support to adjunct instructors is increasing. As the number of veterans and adults returning to the college classroom increases, so does the need to prepare faculty to meet the students' needs. The increasing number of students transferring to 4-year universities, in addition to the economy and budget cuts, has raised a need for stable articulation with universities.

Sources


Technological innovations continue to provide new and innovative products and applications that increase accessibility, flexibility and communication. Some of the emerging technological trends impacting education include mobile computing (including smart phones, netbooks and the Apple i-Pad), open content (a collection of free online materials), and cloud-based applications and services.

Students expect to be able to learn and study whenever and wherever they want to. These emerging technologies (including electronic books, mobile learning and augmented reality) are providing greater access to information no matter where we are, what time it is or what device we choose to use. It is important for the Maricopa Community Colleges to continue to adapt to the new technologies to meet the new student expectations.

Mobile computing includes network-capable devices that many students are already carrying like laptops, notebooks, netbooks, smart phones and the i-Pad. Students want faster and easier access to the information on the network including social networks. Mobile computing allows “just-in-time” and “anytime, anyplace” learning and students perceive that a faster approach is a better approach. The focus of m-learning is accommodating and supporting a mobile population and creating a more effective learning experience for students. Mobile computing and m-learning are important for the future of e-learning and distance education.

The digital environment provides access to electronic books. A big change has been the growth of digital books that can be purchased online or at the campus bookstores. Open access textbooks (free, online texts) are another option for students. Open content (a collection of free online materials including course content) will also provide benefits to students.

Cloud-based applications and services (internet-based computing where shared software and information is provided on-demand) allows access to information no matter where we are or what device we decide to use. Microsoft and Google are two of the cloud service providers. One negative with cloud computing is entrusting your work and information to the cloud but the potential cost savings may outweigh the negatives.

Another innovation is the development of simple augmented reality applications. These programs provide simulations of real situations and are available for laptops and smart phones. This new tool is still two to three years away from widespread use on campuses and will be an important part of the virtual learning environment.
Students will expect a wide array of technology tools, delivery mechanisms and alternative content in the future. The new technology will improve access, lower software costs, and improve processing power and storage capacity. Strategies will be needed to ensure that students are engaged and supported in the virtual environment. Colleges will need to adapt to the new expectations.

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U.S. and Arizona Outlook

Contributed by John Catapano, Coordinator Research and Communication, MCCCD Center for Workforce Development

Nationwide, there are increasingly positive signs that the economic recovery has begun. The U.S. economy added 573,000 jobs in the first four months of 2010 (290,000 in April alone) including 101,000 jobs in manufacturing. Consumer spending and confidence is up, exports are increasing, payrolls are growing again, companies are reporting stronger-than-expected earnings, and despite recent losses the Dow Jones Industrial Average is up nearly 60% in little over a year. U.S. has survived the worst downturn since the Great Depression because the public and private sectors reacted quickly to the economic crisis, and were willing to restructure and write off bad debt. In the first quarter of 2009 the economy was shrinking by an annual rate of 6.4%, by the fourth quarter of 2009 it was growing by a 5.6% annual rate.

There are plenty of reasons to caution the recovery. Unemployment remains near a 25-year high, and as a lagging indicator will remain high even as the economy recovers. Currently, the unemployment rate nationwide stands at 9.9% in April, down from 10.1% in October of 2009. Nearly 7.8 million jobs have been lost since employment peaked nationwide in December of 2007. The U.S. would need to add 160,000 jobs per month for four years to match its 2007 peak. Nearly 45% of unemployed persons nationwide have been out of work for more than six months, the highest percentage registered since World War II. Factoring in other measures of unemployment and underemployment, such as discouraged, marginally attached, and part-time workers, the U.S. unemployment rate jumped to 16.6%.

Other problems loom on the horizon which may derail the fragile recovery. Housing remains an ongoing issue. Normally, a rebound in the residential housing market drives economic growth in a recovery. Not this time. Although home prices are showing signs of improvement, this might be temporary as new waves of foreclosures hit the market and the $8,000 tax credit for first time home buyers comes to an end. Energy prices may also increase, as the resumption of economic growth, particularly in Asia, pushes prices higher. The Greek financial crisis and the high debt load of many European nations may drag the continent into recession. The Greek crisis has already driven the Euro to a four-year low, which hurts U.S. exports. Concern about U.S. debt is also rising. As a percent of GDP the U.S. budget deficit is at its highest level since the end of WWII. Finally, federal stimulus spending is coming to an end, which means billions of fewer dollars flowing into the economy.

Arizona Outlook

Arizona was one of the first states to enter recession as the nation's economy began to turn, and was one of the last to begin recovery. All indications are that Arizona's recession came to an end with the start of the new year, about six months after the U.S. recovery began. Employment in Arizona is no longer falling, retail sales are up, personal income has stabilized, and the housing market is in the early stage of recovery.
Despite positive trends, it will take Arizona years to repair the economic damage that has been done. Statewide, the unemployment rate now stands at 9.5% in April, and will remain high. Population growth in 2009 (1.5%) was the slowest seen in at least 50 years, sales tax receipts have fallen by nearly one-third, in 2009 personal income, adjusted for inflation, declined for the first time ever. Arizona lost 343,000 (or 12.7%) of jobs between 2007 and 2009. Moving forward, if job growth in the state matches the average rate seen between 2000 and 2007 (2.7%), it would take nearly five years to recover all the jobs lost since 2007.

Employment in most of Arizona's industry sectors is beginning to stabilize. Sectors employing more people in April 2010 (compared to April 2009) include educational services, wholesale trade, general merchandise and department stores, healthcare, social services, and federal government. Sectors still struggling with negative employment growth include construction, manufacturing, transportation and distribution, information, financial services, administrative services, and state and local government. Also, employment in Arizona's high-tech sector remains flat, and has been for most of the last decade.

Arizona's housing market is showing early signs of recovery. Residential building permits, which bottomed out in January 2009, are up 47% in the first four months of 2010 compared to the first four months of 2009. Existing home sales are also up sharply, driven by federal tax credits and investors buying, repairing, and "flipping" homes. Although rates of foreclosures and short sales remain high, home values bottomed out in Greater Phoenix in May 2009 and are up 6.8%. The inventory of vacant homes is estimated at 120,000 statewide, and it will likely be 2014 before homebuilding in Arizona matches levels seen before the downturn.

Although the recession in Arizona has ended, it will likely be several years before the state's economy transitions from recovery to expansion mode. Moving forward, growth may be muted by continued difficulties in the real estate market, particularly commercial real estate, and continued layoffs in the public sector. The economic impact of SB1070 boycotts is also an unknown factor. Governments at the state and local level will struggle to balance budgets for at least the next three years even with the passage of Proposition 100, and funds for public schools, infrastructure, and economic development initiatives will be limited.
Environmental Scanning Wiki Resource

An online planning tool, the BrainKeeper Wiki, has been used to collect information throughout the year. The wiki is a web accessible database where registered participants can share articles and opinions about future trends, issues or events that may impact the Maricopa system in the future. The information that is posted to the Wiki is reviewed at a spring summit where the key trends and implications are discussed and summarized. Over 150 postings were made concerning economic and workforce trends; education trends; external stakeholders-partnerships; political and legislative trends; and social and technological trends over the past year.

If you would like to be added to the Wiki contact the Office of Institutional Effectiveness.

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Some sample articles from the 2010 E-Scan Wiki are posted on this web site:

http://mcli.maricopa.edu/escan