



October 15, 2008

Dr. John S. Nixon
President
Mt. San Antonio College
1100 North Grand Avenue
Walnut, CA 91789-1399

Dear Dr. Nixon,

Thank you so much for the opportunity to work with you and the management team at Mt. San Antonio College. It has certainly been a pleasure and I look forward to seeing Mt. San Antonio College continue to grow and prosper – the College is certainly poised for continued success. My discussions with your management team during the presentations of the results of the market scan information were excellent. There was tremendous feedback and interaction among your personnel at the College, and while results were sometimes unexpected by the groups, there were several key themes that were seen across all the market segments at the College. Our final reports have been posted with recommendations for all market segments and should emphasize the areas of strengths and potential opportunities for Mt. San Antonio College by market segment.

As a final step in the research phase of the project, I am providing a summary of the main issues for the key markets for Mt. San Antonio College by market segment on the following pages. Complete detailed reports have been posted for electronic download. These reports contain the detailed written recommendations for each market segment as well as the tabular documentation supporting the research. In this current document, a brief summary of each component of the research with key issues to address are presented for your review.

If we can be of further assistance, please feel free to contact us for any additional help or any clarifications.

Sincerely yours,

Kathi J. Swanson, Ph.D.
President

cc: Clarence Brown

KJS:fed
Attachment

Mt. San Antonio College Executive Summary

Customer Response Scan

A key factor in whether a student actually enrolls at a college is the amount of information the student receives when inquiring about the college – whether by telephone or by the college’s web site. Mt. San Antonio College was contacted (or shopped) by CLARUS Corporation personnel by telephone and via their web site to gain information as a prospective student.

National research has shown that adult students are still likely to call a college for information. CLARUS Corporation personnel called Mt. San Antonio College during day, evening and weekend hours and asked for specific information to assess their response to prospective students by telephone. The key issues examined included:

- How are the calls handled in terms of personnel friendliness and courtesy, wait times, availability of information and overall assistance? How many times is the caller transferred, put on hold, etc.?
- How quick is the turnaround on the information requested and what level of response is given? Are the materials received those that are supposed to be sent to prospective students?
- How easy is it for the caller to get information in the evenings and on weekends?

The purpose of these requests was to examine a prospective student’s “first impression” of the College to examine how a prospective student is first handled when contacting any of the departments at Mt. San Antonio College for information.

Younger students are much more likely today to search a college’s web site for information. Mt. San Antonio College was shopped via its web site. Requests were made on the web site for additional information on varying days and times of the day. The College and the responses were examined for speed and efficiency of reply and information provided.

Four of 23 attempts for information from Mt. San Antonio College resulted in obtaining information packets from the College, a 17 percent response rate. Twenty-three total requests for information were made by personnel at CLARUS Corporation, 19 by phone and four by web request. One-third of the calls (eight) to Mt. San Antonio College resulted in no opportunity to leave a message – the message system would play and the caller was told the call was being transferred and then it would disconnect, even if the caller pressed # as instructed. This necessitated numerous calls to the institution to attempt to get information for each request.

Fifteen requests for information to be sent to the individual were made by speaking to an individual (11 requests) or sending an e-mail (four requests). Packets of information were received as a response to four of the requests for information and predominantly those requests that filtered to an academic department were most likely to be responded to – one packet was received from Admissions, one from Nursing, one from Ag Science and one from Accounting. Three of the requests for information resulted in a staff person refusing to send any information. In one refusal, the caller asked for a schedule to be sent and the response was “we cannot do that” – although the College sends out more than 400,000 to all households. Seven of the requests for information resulted in not receiving the information. For five of the unanswered requests for information, a person took the requestor’s address to send the information but nothing was ever sent in response – after personnel promising it would go out the next day. Two of the unanswered requests for information were via the College’s web site. Overall, the College responded to 17 percent of the requests for information – or less than one in five.

Six areas were examined for the information requests for Mt. San Antonio College – the image and branding, speed of response, content and follow-up, phone system and messaging, web inquiries and Spanish language requests. Key issues that Mt. San Antonio College should address regarding their customer service response to inquiries include:

Image And Branding

- Develop a branded, large mailing envelope for the College to use to send information to inquiries and other mailings to students to support the brand for the College. First impressions are extremely important, especially as students are looking at attending Mt. San Antonio College.
- Explore the feasibility of an information center to be housed in Enrollment Management and staffed by personnel who know and understand the questions that will be asked from prospective students. Current staff are not as knowledgeable as they need to be about programs and information when responding to a potential inquiry for information.

Speed Of Response

- For the few packets that were sent in response to the information requested, Mt. San Antonio College did a very good job in getting the requested information out of the College and to the prospective students. The majority of the responses to the information requests were postmarked the very next day or even the same day. The response for one of the information requests was a little slow – it took a week for the response to be mailed out from the time of the request. Overall, those responses that were filled, were filled quickly.

Content And Follow-Up

- Conduct an inventory of all marketing materials for Mt. San Antonio College to determine if they are logo compliant with respect to the graphic standards manual. Priority materials would be all publications that would be considered external publications and those that would be included in an information packet. If not logo compliant, redo the materials. Work through all materials at the College to reinforce the brand.
- Create a template for the curriculum for the program areas which would contain the information found in the catalog about the courses needed for a program area. Design the template as a two-color, one-page 8 ½ by 11 sheet, in which the curriculum information can be printed for each program area. This sheet can then be saved as a pdf and posted on the web site for each program area. In addition, if printed copies are needed, design the back side of the sheet to provide information about Mt. San Antonio College and the “how to attend process” which would be pre-printed on the back of the sheets. Then the one-page curriculum sheets become relevant and a marketing piece. This format also allows for the curriculum sheets to change as needed and no one would have to search through the large catalog pdf for the information, eliminating poor Xerox copies of the curriculum.
- Develop a simple electronic form which can be utilized by all employees on their desktop that will allow for capture of the inquiry information and Admissions will fill the request for information.
- Create a series of initial inquiry letters, focusing on the high school inquiries, the adult inquiries and program inquiries, and revamp the initial information packet.
- A priority for enrollment management at Mt. San Antonio College, as well as an institutional priority, is to bring up the MIS system Prospect Module to allow for an automated, database-driven inquiry response system to collect and manage inquiries.
- Mt. San Antonio College needs to develop a systematic response system that will include a set of personalized materials and contacts to respond to the student and keep the student engaged in the process. New materials will need to be developed to support the Recruitment Office in fulfilling the requests for information. The response system should include e-mail and direct mail responses.

Phone System And Messaging

- Revamp the main message on the College’s phone system to be more welcoming – with more energy – and the message should always start with “Welcome to Mt. San Antonio College.” Develop a new phone tree system that quickly allows the caller to self-select the options to speed them to their destination. For prospective students, provide a selection that will speed them to the Information Center or a location that will be able to answer their questions and gather their contact information – either in person or electronically through a messaging system.

- Create new trees on the phone message systems for the main departments at the College to make it more consistent for the potential students to gain information and to speed the potential new student through the current phone system.
- Develop an initial greeting protocol for all main departments at the College and have them record the standardized greetings. Also remind personnel of the correct telephone etiquette when responding to a phone call.
- Mt. San Antonio College should examine the current capabilities of their phone system and either utilize it to its full capacity, explore the feasibility of purchasing a new phone system to provide for after-hours messaging, expanded voicemail capabilities and “hunting features” to eliminate messaging during work hours or develop an online option for the students to request information and leave messages and have the recording direct them to the location on the web site.

Web Inquiries

- Mt. San Antonio College needs to develop an electronic “Request Information” form so that it will capture the inquiry in a database and provide a customized response to the inquiry. Prospective students can then be directed to the web site to gain information during after-hours messages.
- To streamline the many e-mail addresses, create a “Contact Us” form with a multiple choice subject line that will automatically direct the e-mail inquiry to the correct office – for example, Financial Aid, Admissions, Billing, etc. An automated response should be created immediately upon receipt of the e-mail thanking the inquiry for their question and telling them how soon they should have a response. In addition, a person in each critical area of the College should be designated to respond to the e-mails. Delete the majority of the personal e-mail addresses and check the validity of the e-mail addresses on the web site.

Spanish Language Inquiries

- Develop a Spanish option immediately on the phone tree, for example: *para español, oprima numero dos*. This will allow the Spanish language speaker to get a message in Spanish and then they can self-select what information they are looking for. It is imperative to have a Spanish speaker available if the College does this. Getting only English speakers would be a detriment, or by selecting an option and then getting the English message would simply defeat the caller and most likely make them frustrated.
- Mt. San Antonio College needs to develop a Spanish language response that will outline the information at the College about the programs and services available for Spanish language speakers. Another response should also be targeted for ESL interest in several of the native languages spoken in the area.

Non-Enrolling Applicants

A major measure of marketing success is the number of inquiries a college receives. After the inquiry, the college initiates a process by which they persuade the inquiry to apply and finally to enroll. Conversion of inquiries into students at a college is another measure of success and when enrollments are in decline, one of the easiest ways to increase enrollments is to increase the conversion of applicants into enrollees. Examining the Fall 2006 semester for Mt. San Antonio College, there were 14,643 applicants and 8,595 students actually enrolled, resulting in a 59 percent conversion. In other words, 41 percent of those potential students who filled out an application did not follow through and enroll at Mt. San Antonio College and of those, 60 percent were 24 years of age and younger (Generation Y).

In order to better understand why those younger students were not following through and enrolling at Mt. San Antonio College, 80 focused in-depth interviews were conducted by telephone on December 4 and 5, 2007 with the non-enrolling applicants in the targeted age group that did not follow through and enroll. Based on the survey results, the key issues that Mt. San Antonio College should address to increase their conversion of applicants into students include:

- National research indicates that to move an inquiry to an applicant to an enrollee takes at least five to seven contacts. Today, Mt. San Antonio College has more than 14,000 applicants per year. To manually try to follow up with these inquiries is almost impossible. Mt. San Antonio College needs to implement a technology solution that will allow College personnel to more efficiently make regular contact with inquiries and applicants. This new system would include e-marketing and a comprehensive communications plans for inquiries, applicants and enrollees.
- A majority of the applicants did not attend another college after applying to Mt. San Antonio College, they still live in the area and would still consider attending Mt. San Antonio College. The College needs to develop an active marketing strategy to target those who applied and did not enroll in the last three years and invite them to enroll again. A fast track process could be used with these applicants to enhance their enrollment process.

Current Students

The customer service audit, the *Student Scan*, was administered on the campus of Mt. San Antonio College during April and May 2008. Two hundred ninety-five questionnaires were administered to current students in a stratified sample of 20 classes (selected by CLARUS Corporation). The ratings of the Mt. San Antonio College students were averaged and statistically compared to the ratings of the community college students at the other 43 community colleges in the normative sample (16,650 other community college students). The survey of students at Mt. San Antonio College had a reliability level of 95 percent and a margin of error of ± 5.7 percent. The reliability of the normative sample is 95 percent with a margin of error of ± 0.08 percent.

The satisfaction ratings of the Mt. San Antonio College students were statistically compared to the ratings of the community college students at the other colleges with respect to their colleges. If the Mt. San Antonio College students' ratings were statistically lower at a significance level of $p < .05$, then this indicates an area which the College should examine for potential improvement (*Areas For Improvement*). If the Mt. San Antonio College students' ratings were statistically higher than the other community college students' ratings of their colleges at the significance level of $p < .05$, this area was deemed an outstanding area (*Areas Of Excellence*). All other areas that were rated at the same level are considered par with the other colleges. The following provides a summary of the areas in which Mt. San Antonio College was rated significantly higher than the other colleges (*Areas Of Excellence*) and those which rated significantly lower than the other colleges (*Areas For Improvement*). The ratings of the other areas in the survey not listed below were equivalent to the other community colleges' students' ratings in the normative data.

Areas Of Excellence

Registration

- Ease/ convenience of registering
- Variety of classes offered
- Classes offered when needed

Business Office/ Billing/ Cashier

- Ease of making payments (in person, mail, telephone, online)

Athletics

- Knowledge and competence of staff
- Variety of programs
- Opportunity to participate
- Quality of athletic facilities

Classroom Instruction

- Quality of instruction
- Course content relative to career
- Variety of classes
- Challenge of courses
- Classroom comfort
- Up-to-date labs
- Up-to-date shop facilities

Technology Access

- Ease of use of wireless internet on campus
- Availability of online student registration
- Ease of use of online student registration

Library

- Friendliness and courtesy of staff
- Knowledge and competence of staff
- Convenience of hours open
- Availability of resources in-house
- Automation
- Current materials

Food Service

- Friendliness and courtesy of staff
- Knowledge and competence of staff
- Convenience of serving hours
- Quality of food
- Selections available
- Temperature of food

Computer Labs

- Knowledge and competence of staff
- Convenience of hours open
- Up-to-date hardware (computers)
- Up-to-date software (programs)
- Availability of computers
- Availability of staff assistance

Student Activities

- Variety of programs/ activities
- Availability of programs/ activities

Main Telephone Number/ Switchboard

- Ease of reaching campus staff members

Areas For Improvement

Tuition/ Fees

- Cost of tuition (enrollment fees)

Business Office/ Billing/ Cashier

- Friendliness and courtesy of staff

Bookstore

- Cost of textbooks

Overall Campus

- Parking availability

- Maintenance of campus

Technology Access

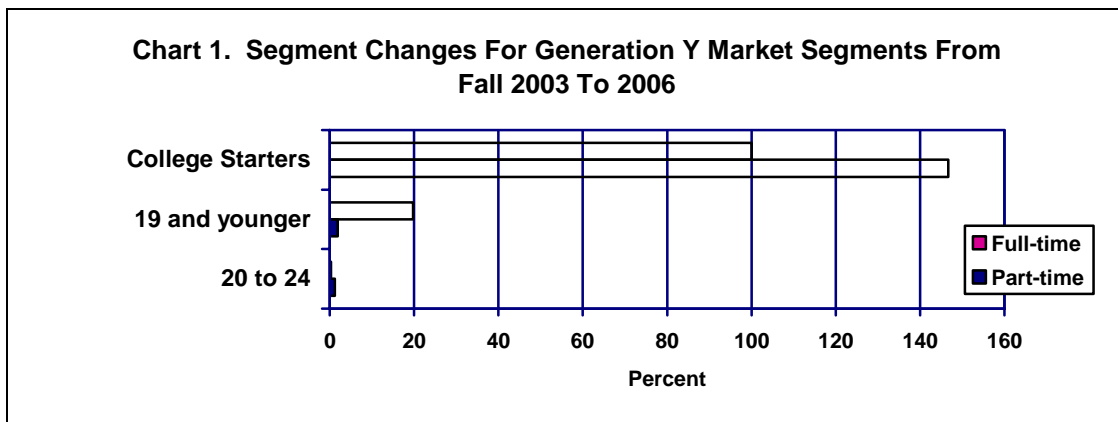
- Access to student e-mail

- Ease of use of student e-mail

The areas at Mt. San Antonio College that were rated lower by its students than the other community college students in the normative data should be examined. It is recommended that focus groups with students be conducted to provide insight into the lower ratings and potentially provide for solutions.

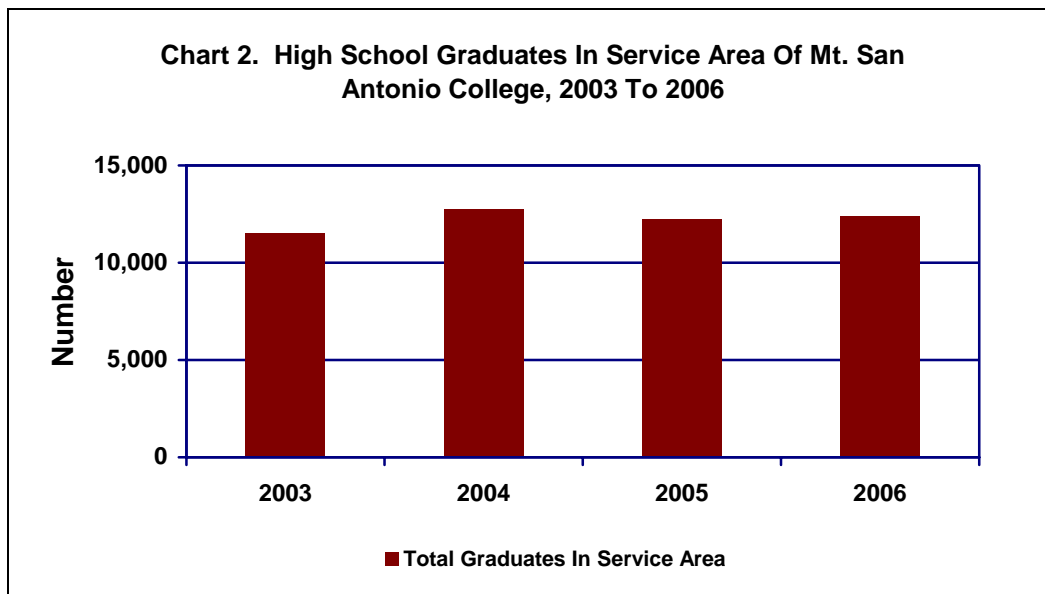
High School Market Segments

When evaluating the high school market, three distinct groups are examined – the College Starters (those attending high school and college simultaneously), high school graduates 19 years of age and younger and those students 20 to 24 years of age. All of these age groups are within Generation Y. Generation Y represents the high school market of today and young adults that colleges are trying to attract to classes. The widespread use of personal computers and the Internet is an event shared by the majority of Generation Y. Most members of this generation spent at least part of their youth with a home computer and Internet access, and members of this generation use the Internet as a tool for socialization more so than previous generations.



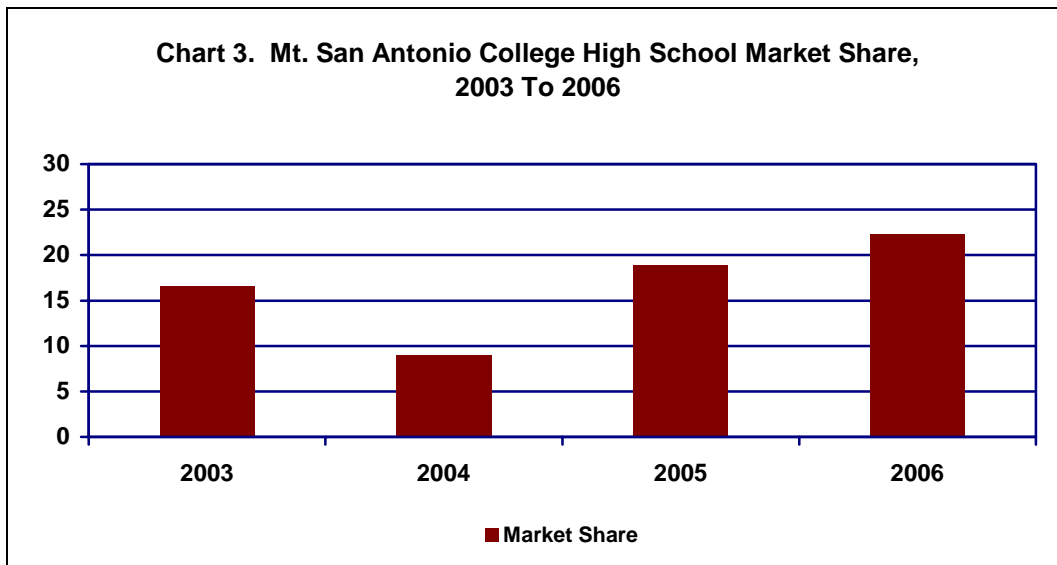
As seen in Chart 1 above, the greatest growth in enrollments at Mt. San Antonio College has been in the College Starter market and the 19 and younger full-time enrollees. Full-time College Starter enrollees increased 100 percent from Fall 2003 to 2006 and part-time College Starter enrollees increased 147 percent from 2003 to 2006; however, the segment only accounts for less than one percent of the total enrollees at the College. Although there were large gains in the College Starter segment, the overall numbers are small and may indicate an area of potential expansion for the College. The 19 and younger segment, which accounts for 28 percent of the total enrollment, had an increase in the full-time segment of 20 percent from 2003 to 2006, but the part-time segment only increased by two percent. The 20 to 24 age segment accounts for 40 percent of the enrollments at the College but growth in the full-time market was flat from Fall 2003 to Fall 2006 – only an increase of 0.3 percent – and the part-time segment only increased slightly more than one percent.

The key question for Mt. San Antonio College in the high school segment is whether or not there is additional room in the high school market for increased market share. The answer to this question is based on the current K-12 enrollments and the number of high school graduates in the service area. As seen in Chart 2 below, the number of high school graduates in the College’s primary service area has slightly increased from 2003 to 2006.

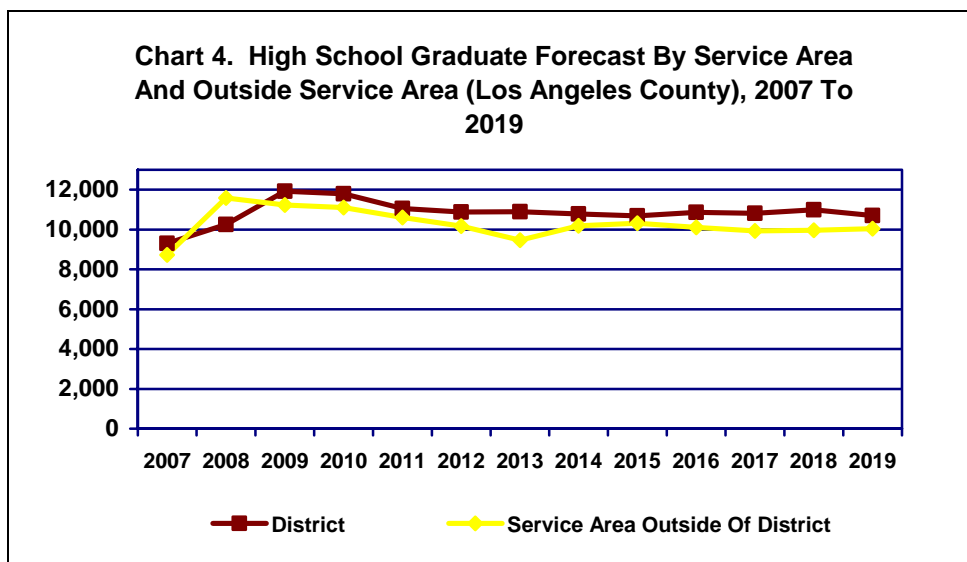


High school market share is determined by calculating the number of enrollees in the Fall semester at Mt. San Antonio College who graduated from high school the previous Spring. As seen in Chart 3 on the next page, Mt. San Antonio College saw a dip in their market share in 2004 but have dramatically brought the high school market share up since then. In Fall 2003, the College’s high school market share was 16.6 percent – in other words, the College was enrolling 16.6 percent of the high school graduates in their service area. In

2004, the market share dipped to 8.9 percent and the College actively put more resources into high school recruitment, which has paid off. Mt. San Antonio College's high school market share in 2005 had increased back to 18.8 percent and by 2006 it was 22.2 percent.



After the graduating classes of 2009 and 2010, Mt. San Antonio College may begin to see a slight decline in the number of high school graduates across the service area (see Chart 4 below with high school forecasts). The question facing Mt. San Antonio College is how much additional market share is available in the service area for the College and what does the College need to do to increase high school market share.



In order to answer that question and understand the high school market, a survey was conducted by telephone of 350 high school students in specific zip codes within Los Angeles County comprising Mt. San Antonio College's service area, which resulted in a 95 percent reliability and a 5.2 percent margin of error. The sample was stratified by the zip codes in the service area and the data was collected from January 8 to February 14, 2008. Results were summarized by the high school student's likelihood of attending Mt. San Antonio College.

Based on the results of the High School Scan, the following is a summary of the main issues that need to be addressed to increase the population of high school students:

- Overall, the College does have additional room for increased market share based on the percent of high school students who would consider attending Mt. San Antonio College immediately after high school. Overall, 46 percent of the students in the Mt. San Antonio College service area would consider attending Mt. San Antonio College. The College's current market share is only 22 percent and the College should be able to increase high school market share to 30 percent. The major issue to consider is that the forecast for the high school market is expected to decline, so even maintaining share in a declining market will lead to reductions in the high school students attending.
- The recruitment and marketing efforts needed for the increase in high school market share will have to focus on electronic communications, direct mail and media advertising. The current marketing and advertising budget for Mt. San Antonio College has focused on a multi-market to increase overall awareness and has primarily been registration driven. In addition, the majority of the marketing budget has been tied up in the publication and distribution of the class schedule – definitely not a marketing piece, although the marketing department has tried to move it to a marketing focus. In addition, the outreach activities focused on the high school market have been very traditional – high school counselors' luncheon, community/ college fairs, Seniors' Day and high school presentations and visits. There has been very little recruitment and marketing directed to the high school market and very little communications with the high school students individually.
- Mt. San Antonio College must make a major initiative to upgrade their web site to focus on marketing to the high school students. More than 80 percent of the current students applied to the college online. Research indicates that students look to the web site first for information about a college, prefer direct mail and e-mail communications and expect to have an interactive relationship with the College via their web site. Students expect to fill out forms online – not a pdf to print out and fill in. To actively recruit students, turn them into applicants, have them enroll and retain students, a systematic e-communications process needs to be in place to communicate and track students. Currently, the first letter received by an inquiry is a "Dear Prospective Student" and not even personalized. In today's market, prospective students expect personalized communications in an electronic age.
- Today's parents are important influencers about education for the high school market – the majority of parents are actively involved in the choice of a college for their child from initiating the conversation to actually getting information for the child to taking the child on college visits. Mt. San Antonio College should support a major marketing effort aimed at the parents of the current junior high and high school students, emphasizing the reasons that the College would be a good fit for their child – for transfer or career. Parents are being actively involved in the college decision process of their children and the College needs to utilize web communications to provide information for the parents. Parents are a market and Mt. San Antonio College needs to recognize this and communicate with this market.

After an in-depth look at the image and awareness of the high school markets and the profiles of the high school students who are considering attending college, and the current recruitment and marketing efforts at the College, the following recommendations were made for Mt. San Antonio College:

- Focus on career awareness days on campus at Mt. San Antonio College to reinforce the career clusters and increase awareness about the programming the College has to offer.
- Prepare a junior high presentation about career exploration and attending college or obtaining a career in the next decade and offer the presentations to junior highs and middle schools.
- Design a high school landing page on the College's current web site that will provide a location for high school students to log in and gain the information important to them without having to search the College's web site.
- Develop an online request information form that provides a personalized viewbook as a response to the inquiry.
- Reformat the initial packet to the inquiry and develop a system of responses rather than the current initial packet being sent to inquiries.

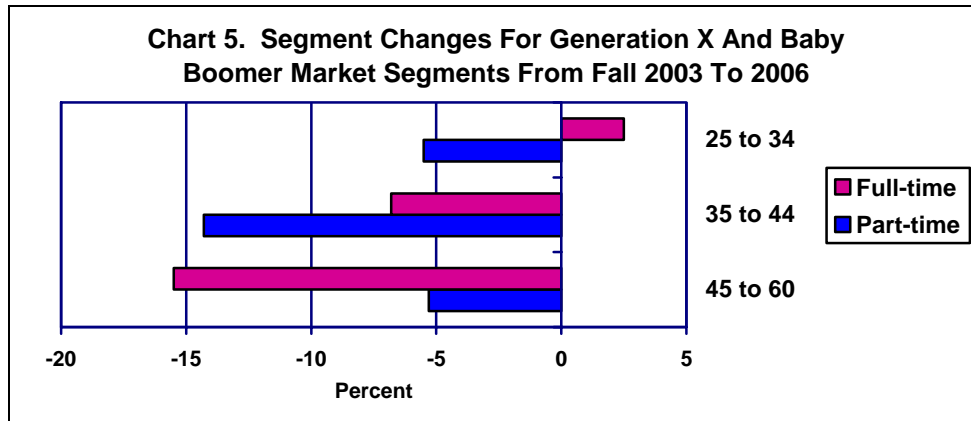
- A radio campaign should be developed to focus on the high school students during the semester that are image based and not registration driven.
- Focus on the high school market by developing a direct mail campaign aimed at the high school students in the service area grades 9 to 12.
- Prepare a series of e-mail communications to focus on the inquiries and non-enrolled applicants to move them to enrollment as a part of an e-communications plan.
- Create a presence on MySpace and re-assign the responsibilities of one of the College's recruiters to an e-recruiting position.
- Utilize viral marketing for the high school market. Rather than development of additional printed materials, the marketing department should create short video clips for marketing that can be posted on the College's web site as well as YouTube.
- Raise money for recruiting scholarships for new students and create an online scholarship application rather than a pdf.
- Budget for an e-communications specialist as an addition to the marketing team at Mt. San Antonio College.
- Functionally, the web site should report to marketing given that it is a major external communication and the vehicle to actually market electronically with information technology supporting the infrastructure.
- Establish a "Bring your sibling day" at Mt. San Antonio College.
- It is recommended that as soon as the *Academic Programs* tab is clicked on the web site's home page, an alphabetic list of programs appears in the web site window.
- Create a targeted marketing campaign for increasing Summer enrollments by developing a master schedule of classes to be sent to households in the market before Thanksgiving to hit the students attending a four-year college prior to their Spring enrollment at their four-year college.
- Create a targeted marketing campaign aimed at the parents of the high school students emphasizing the benefits of attending Mt. San Antonio College.

Adult Market Segments

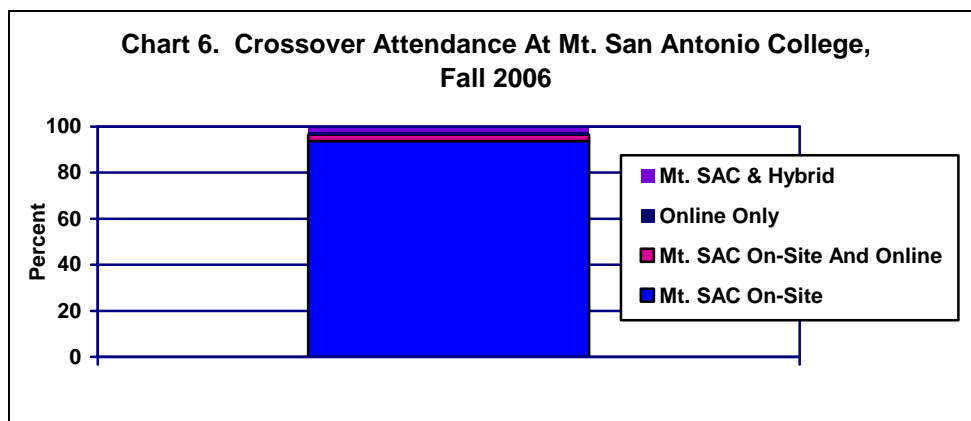
Four age groups represent the adult market segments for Mt. San Antonio College, which correlate to three adult generations – 25 to 34 years of age and 35 to 44 years of age (Generation X), 45 to 60 years of age (Baby Boomers) and 61 years of age and older (Matures). Generation X is typically the parents of Generation Y'ers. Generation X is the working adult market for colleges today. Generation X is generally marked by its lack of optimism for the future, cynicism and lack of beliefs and trust in traditional values. During the early 1990's, the media portrayed Generation X as a group of flannel-wearing, alienated, overeducated, underachieving slackers with body piercings, who drank franchise-store coffee and had to work at low-level jobs like McDonald's. The employment of Generation X is volatile. The Generation X'ers grew up in a rapidly de-industrializing Western World, experienced the economic recession of the early 1990's and 2000's, saw the traditional permanent job contracts disappearing and becoming unsecure short-term contracts. They experienced off-shoring and outsourcing and often experienced years of unemployment or working at jobs that they had in their youth. They no longer take any employment for granted, as their Baby Boomer parents did, nor do they consider unemployment a stigmatizing catastrophe. They have become excellent parents, preferring to spend time with family rather than work.

Baby Boomers, born after World War II between 1946 and 1965, are the parents of Generation X and are characterized by strong work ethics and high levels of interest in education. Baby Boomers believed that hard work led to greater economic gains and increasing levels of education was the way to get ahead. The Baby Boomers were the first group to be raised on television. The Baby Boomers found that their music was another expression of their generational identity. Rock and roll drove their parents crazy. Aging Boomers today strive to stay young – they are living longer and want to enjoy it. They believe in education and want products and services to keep them young and in touch.

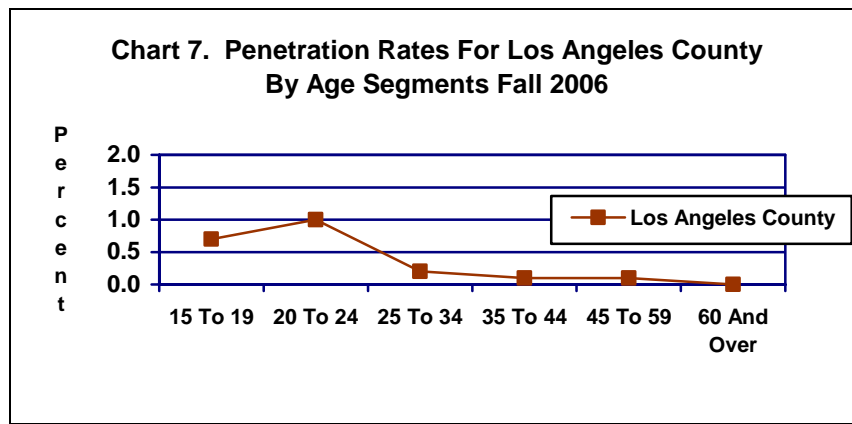
Finally, the Matures, born before World War II, grew up as the suffocated children of war and depression. They came of age too late to be war heroes in World War I and remember the Depression as children and they remember food shortages. The Matures became the risk-averse, worked hard and were very conservative. They saved to assure themselves the shortages of the Depression would never happen to them again. The Matures expect respect for all they have accomplished and achieved. Typically, the Matures will look to education for entertainment.



Overall, Mt. San Antonio College has not been reaching the working adult markets described as Generation X – age groups 25 to 34 and 35 to 44 – in large numbers, as seen in Chart 5. In Fall 2006, one-fourth of the credit student population were working adults in Generation X and only six percent of the credit student population were Baby Boomers. Mt. San Antonio College has seen a decline in the working adult market since 2003, typically a market interested in skill updates and career changes. The only group which Mt. San Antonio College has increased in Generation X has been the 25 to 34 full-time students – but they have only increased two percent. The question is why aren't the working adults attending Mt. San Antonio College and what needs to happen to serve that market.

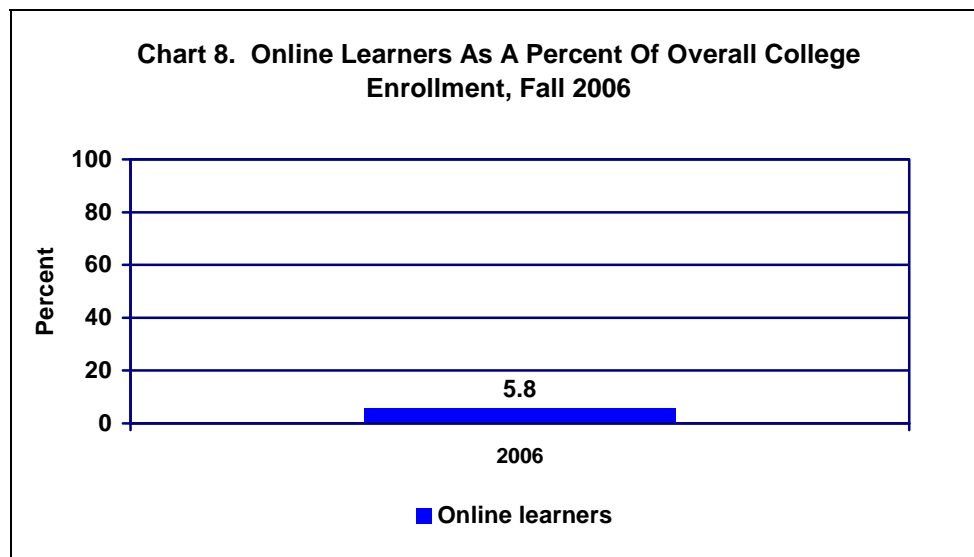


It is important to understand how students are currently attending classes at Mt. San Antonio College and to determine if there is crossover among other locations at the College. As seen in Chart 6, more than 93 percent of the students currently attending Mt. San Antonio College are attending the main campus at Walnut only. Only 1.4 percent of the current students are online attendees only and another 1.4 percent are attending the main campus and hybrid courses. Three percent of the current students are taking classes at the main campus and taking an online course as well. Typically, a college would expect at least 10 to 20 percent of their students taking classes online as well as on the campus.



The penetration in the 25 to 34 year old market segment (enrollees divided by population) is lower than one would anticipate – less than one percent – and is highest in the 20 to 24 and 15 to 19 populations, as one would expect. However, the enrollment of Mt. San Antonio College in the penetration chart above (Chart 7) is compared to the population of Los Angeles County and not only the zip codes in the service area.

Online learners have been a growth phenomenon at many community colleges in the last few years, but for many community colleges it has been an increase in load for many students and not new students from other locations outside of a college’s service area as expected. Examining the number of online learners as a percent of the student population provides an overview of how well the College is penetrating online and those results are presented in Chart 8.



Mt. San Antonio College had 5.8 percent of their current students taking online classes in Fall 2006 (1,427 students of 24,653 total students). Examining the overall profile of online learners for Mt. San Antonio College, one finds that one-fourth of the online learners are taking 100 percent of their load online – or are true online learners. Twenty-six percent of the students enrolled in online courses are taking 30 percent of their load online and 16 percent are taking 40 percent of their load online. Only 11 percent are taking 60 percent of their load online and eight percent are taking half of their course load online. Mt. San Antonio College is reaching Generation X with 23 percent of their current online students ages 25 to 34. Only eight percent of the online students are 35 to 44 years of age and five percent are 45 to 60 years of age. More than half (51 percent) of the current online students at Mt. San Antonio College are Generation Y, specifically ages 20 to 24 and 13 percent are 19 years of age and younger.

In order to better understand the working adults, a community survey was conducted by telephone to assess the image of the College and the needs of the working adults in the market. Five hundred households in the service area were surveyed by telephone from February 18 to April 9, 2008, resulting in a 95 percent reliability and a 4.4 percent margin of error. The survey was stratified to represent the service area of Mt. San Antonio College, specifically those zip codes in Los Angeles County comprising the College's service area.

Based on the results of the Community Scan, the following is a summary of the main issues that need to be addressed to increase the population of working adults:

- Market awareness needs to be increased among the populations in the market area of Mt. San Antonio College. Only two in ten residents named Mt. San Antonio College first when listing colleges in the area and only four in ten residents named the College at all as an educational institution in the area. Community members must have top of the mind awareness of Mt. San Antonio College before their messages about programs and services offered at the College will be heard by the markets. While the members of the community can provide a rating as to what characteristics of a community college are important, more than 60 percent of the market does not know enough to rate Mt. San Antonio College on the characteristics. The good news is those who know the College, rate it highly. Changes need to occur in the College's marketing and advertising expenditures in the market to increase the overall awareness and familiarity of the College.
- Attracting the adult market to Mt. San Antonio College will become even more important as the College sees a potential decline in the number of high school students in the market over the next few years. However, Mt. San Antonio College has not seen major increases in the adult students over the last three years – declines have been seen in most adult segments. The adults, ages 25 and over, accounted for 31 percent of the student enrollment at Mt. San Antonio College in Fall 2006, down from 33 percent in 2003. Adults also rated Mt. San Antonio College low on providing continuing education for adults who already have jobs. But, there is a market for the potential adult students for Mt. San Antonio College. Overall, 40 percent of the adults in the service area are interested in taking classes to upgrade job skills. But to meet this market demand, the College will have to offer flexible scheduling and new programming to meet the needs of the adults.
- The market around Mt. San Antonio College has a high percentage of Hispanic consumers in varying generations. The marketing for the College must take into account the values of the Hispanic market and explore new methods of communicating with the market. More than half of the potential adult learners in credit programming are of Hispanic/ Latino ethnicity.
- In order to make programming more accessible to the adult market, the College needs to examine providing programming at sites other than the main campus in Walnut. Forty-six percent of the respondents to the survey reported that they would be more likely to attend classes at Mt. San Antonio College if the College offered classes at a site other than the main campus in Walnut. By offering classes at off-sites, this may alleviate the perception among the market that classes are full and they cannot find a seat near registration time.
- Continuing education opportunities exist in the market for noncredit professional programming as well as personal interest programming, but the marketing methods used for the programming needs to be much more targeted and direct mail driven.

After an in-depth look at the image and awareness of the adult markets, the profiles of the adults who are considering attending college and the current recruitment and marketing efforts at the College aimed at the adult markets, recommendations were made for Mt. San Antonio College for the adult market:

- Plan a phased withdrawal of the total market mailing of the class schedule and realign the marketing dollars to focus on promoting the College to the adult students in the market.
- Prior to the implementation of additional marketing and advertising in the market, an adult landing page should be created on the College's web site to track interest from the marketing. In addition, the College should create an adult viewbook that can be sent in response to an inquiry and that the recruiters can use to distribute at community events.

- Create a direct mail campaign aimed at the adults in the service area in place of the mass mailed schedule. The College needs to begin to shift its communication from the mass marketing of the schedule to regular focused communications via direct mail several times a year to the areas in the service area that are interested in education and training.
- Develop programming packages that can be marketed to the adult population interested in attending college in the service area of Mt. San Antonio College, such as expanded Weekend College, Industry Skill Set packages, Curriculum Programming and Schedule On Your Time.
- Fund a mass marketing campaign aimed at the adults in the service area that would focus on the new programming options created by the College.
- Explore revamping the off-site at Pomona as a key off-site location for expansion of credit and noncredit programming in the service area and explore the feasibility of another location in the west side of the service area.
- Develop messaging and a media campaign for the potential Hispanic enrollees in the market to include adults and parents of high school students. From a message perspective, the College cannot simply translate an English ad into Spanish. Key messages for the Hispanic market include family and home, holding traditional values and media friendly. Develop a media strategy aimed at the Hispanic families in the market to reinforce how education will be a positive support for the family for adult Hispanic females and for the youth in the families.
- Multiple markets exist for expansion in community education at Mt. San Antonio College for personal interest and career skills development and the College needs to develop a systematized database for development of just in time marketing through variable data printing and direct mail to expand the market.
- Design a skill set catalog that includes the credit and noncredit programming for updating skill sets at Mt. San Antonio College.

Workforce Segment

Employers in the service area of Mt. San Antonio College comprise a potential market segment for Mt. San Antonio College for credit and noncredit programming. In order to assess what the current needs of the employers in the service area are for training and educational opportunities for their employees, a combination of personal and telephone interviews were conducted with employers across the service area and were stratified by industry type. The interviews were conducted between March 18 and May 22, 2008 and the 400 interviews represent 144,917 full-time employees and 16,367 part-time employees. In the last year, 79 of the companies, that would share their budget, spent \$5 million on training to outside vendors or sending employees to training. The major opportunities and issues to be addressed with the employers include:

- Mt. San Antonio College should explore the development of a Leadership Training Institute and offer certifications in leadership, management, computers and human resources.
- Explore the feasibility of a revenue share for the programming offered by contract through the Leadership Institute and the departments for the faculty who develop and deliver programming.
- Google searches have become an effective way for businesses to search for providers of education and training. The College needs to invest in an online Google search sponsorship for any education and training searches for the zip codes in the Los Angeles County service area so that the College is always predominant in any searches for business and industry training.
- Working through the Career Placement Office at Mt. San Antonio College, expand the number of internships into both the AA and AS programming and create more meaningful part-time job opportunities for the students.
- Mt. San Antonio College should inventory all of the certifications required by the state for their service area and then target a list for development of continuing education for the industry.

- Designate Centers of Excellence at Mt. San Antonio College for those program areas that can provide the true lifelong learning needed to attain credentials and degrees and then continue to update the program areas. Rather than a massive push for business and industry training at Mt. San Antonio College, the College should target additional contract training on an industry basis in which they have been seen as an excellent provider and performer.
- After examining the current programming offered at Mt. San Antonio College and the demand for new programs in the forecasts of occupations expected to grow in California and the Los Angeles market over the next decade, the following program areas should be considered by the College for new program development:
 - Health Care to include medical assistants, diagnostic medical sonographers, occupation therapy assistants and aides and dental hygienists and dental assistants
 - Logistics
 - Industrial maintenance
 - Construction trades in industry as well as remodeling and renovation for homes
 - Automotive to include diesel mechanics and RV (recreational vehicle) service technicians
- Reorganize the College catalog by program topic area and do not separate certificates from associate degrees, but make it alphabetical by program areas – transfer areas and technical areas.
- Develop a Programs of Study Book for mass distribution rather than the College Catalog.
- Update the program information on the College web site.
- The College should develop a targeted push-pull campaign for those employees who have tuition reimbursement available to them.
- AutoCAD and lean manufacturing may be program areas of interest to focus on using tuition reimbursement for employees to increase their skill sets.

Non-Returning Student Segment

Persistence is an important measure of the success of an institution – in other words, how long can the College retain the students they recruit? For many educational institutions, it is much easier to retain a student for a length of time, especially if they have a degree as a goal, rather than always recruiting new students to boost enrollment. During the Fall 2006 semester at Mt. San Antonio College, 5,155 first-time students enrolled during the semester, but of those students, 2,512 students (49 percent) did not return to Mt. San Antonio College by Fall 2007. Examining the 49 percent who did not return, 1,637 (or 65 percent) only completed Fall 2006 and did not return and 875 students (35 percent) completed Fall 2006 and Spring 2007 and did not continue. A majority of the non-returning students were in Generation Y, with 46 percent 19 years of age and younger and 27 percent age 20 to 24.

In order to better understand why those students did not return to the College after a semester or two, a series of 80 focused, in-depth interviews were conducted by telephone on December 5 and 6, 2007 with the students in Generation Y that did not return to the College. Based on the survey results, the key issues that Mt. San Antonio College should address to increase retention of Generation Y include:

- Nationally, the last students to apply (late applicants) are typically more likely to be the first to not be retained at a college. Almost two-thirds of the first-time non-returning students at Mt. San Antonio College applied to the College two months or less prior to the start of classes – some only a few days prior to the start of the semester. Utilizing the Banner system, these students should be tracked to assess problems prior to the end of the semester in which they do not return. Potential early intervention with the students may assist in getting additional services to them that will retain them. In addition, to close the enrollment management loop at the College, a College-wide early warning system needs to be implemented at Mt. San Antonio College.

- Mt. San Antonio College's enrollment goal is a slow and steady growth – potentially two percent per year. Examining the number of students needed to maintain that growth and assuming that marketing will continue to be successful in recruiting new students, only 500 students per year are needed to sustain that level of growth. Simply retaining 20 percent of the first-time students each semester would assist in achieving that enrollment goal. About half of the students leave Mt. San Antonio College because of academic or financial reasons – and these are areas in which the College can typically assist students. More internal marketing to current students about academic support services and availability of financial assistance should reduce the number of non-returning students at the College.
- The students who leave Mt. San Antonio College and do not attend another College would consider attending Mt. San Antonio College in the future, and the majority of the students are still in the area. The College needs to be more aggressive in their communications with the students who leave after a semester or two. Direct mail campaigns and e-mail campaigns should be used to encourage the students to return to Mt. San Antonio College to complete their program area. In addition, the College should be more aggressive during a semester to ensure that the currently enrolled students who do not graduate re-enroll for the upcoming semester.