

Southern California – Inland Empire

Evaluation Summary & Recommendation – June 2019

Proposal and Recommendation

Establish a new location in the Inland Empire of Southern California with an anticipated launch date of late-Summer, early-Fall of 2020. The proposed location for this campus would be in the city of Moreno Valley or Riverside. The mid-size campus would provide career training in seven of San Joaquin Valley College's existing programs: certificates in Medical Assisting, Medical Office Administration, Business Administration, Pharmacy Technology, Heating, Ventilation, Air Conditioning, and Refrigeration, and Electrical Technology, and associate degrees in Criminal Justice: Corrections, Heating, Ventilation, Air Conditioning, and Refrigeration, and Electrical Technology. This recommendation is a result of an evaluation completed by the Growth and Development team.

Background

The Inland Empire (IE) is a densely populated region in Southern California which includes Riverside County and San Bernardino County. For the purpose of this evaluation, the growth and development team researched three of the largest cities in the IE: Riverside, San Bernardino, and Moreno Valley. This particular part of the county is home to a very healthy growing economy. Although the Ontario campus has addressed some of the employment needs, the volume of individuals with nothing greater than a high school degree and between the ages of 18 and 34 (addressable market) indicates there is a community with unmet needs who would benefit from additional career training opportunities. In addition, the recent and abrupt closure of Brightwood College stripped the community of an educational and training opportunity in allied health and trades.

We determined which programs would be the best fit for the proposed location by researching the occupational outcomes of the proposed programs in which the College has successfully taught for decades, and compared them to the community's need for trained and skilled workers within those same occupations. Thus, this proposal is a direct response to the educational and employment needs of the community. We also considered the search volume results and number of peers offering the similar career training programs in the area.

San Joaquin Valley College's Ontario campus currently serves the western part of the IE. The census demographics for Moreno Valley, Riverside, and San Bernardino are closely aligned with our current demographics in Ontario. Of all of the cities researched, the city of Riverside has the greatest amount of people, and substantially more people than Ontario.

Strategic Evaluation

The Growth and Development team first considered the proposed Southern California location through the lens of SJVC's strategic objectives.

Increase Campus & Program Offerings

The proposed location is a result of the Growth and Development team identifying, extensively researching, and responding to an underserved market in Southern California.

Enroll Capable Applicants

The competitive analysis captured a radius of 30-miles around each city, however, given the close proximity of the cities, competitors were assigned to their nearest market (city). The IE has about 15 direct competitors. The College's strongest competitors will be UEI, Platt College, and Intercoast Colleges. Although not considered a direct competitor, the IE does have a handful of community colleges in each of the cities researched, some of which are offering comparable programs to SJVC. Over the last two years, the IE has suffered from the closure of two career training colleges: Brightwood College (late-2018) and Westech (early-2017). (Exhibit 1: Competitive Analysis)

In an effort to measure consumer demand, the marketing team launched an internet test marketing campaign for about two weeks. The non-branded marketing campaign launched a variety of landing pages and captured the number of consumers in the community searching for a career training opportunity in one of the described programs. It also tracked the number of users who viewed our advertisement and the number of consumers who clicked on our advertisement. The proposed locations tested had similar search demand to each other, but significantly higher results than Ontario and Temecula (in most programs). Marketing test campaign results support a healthy number of consumers searching for career training programs. (Exhibit 2: Google Search Demand Results)

As noted above, a statistical analysis of the United States Census Bureau data indicated the city of Riverside is more densely populated than all other cities evaluated. The same is true about the data for what we consider our addressable market. The total population and addressable market for the entire Riverside and San Bernardino market, excluding Ontario, is 1.7m and 137k, respectively. Despite the number of competitors in this space, the overabundance of potential students lends this footprint to being a favorable market for the proposed location. (Exhibit 3: Census Data)

The projected start budget anticipates the proposed campus will start just over 1,000 students in the first 24 months of operation (Exhibit 4: Marketing & Starts Budget). It should be noted this includes a delayed start for Electrical and does not include the potential for starts in a Vocational Nursing program. We do anticipate a new location in the Inland Empire may slightly decrease the overall number of students at the Ontario campus.

Achieve Professional Success

The IE is home to the nation's quickest job growth in the last five years (Exhibit 5: The Press-Enterprise Article). The volume of projected job openings and available employers from the Employment Development Department indicate job security is promising (Exhibit 6: EDD Employment Data). Given the average commute time (~30 minutes) and common knowledge of the traffic patterns in Southern California, graduates of the proposed location are likely to travel and commute greater distance and time for employment (Exhibit 7: Census Commute Data).

Increase SJVC Presence

Adding a new campus to the IE is an effective way to increase SJVC presence and generate new revenue. This addition will also strengthen our brand recognition in the Southern California area as well as add about 300 students to the institution's total census.

Ensure Financial Stability

Within the first 24 months of launching the proposed Southern California campus, it is projected to generate \$12.4M in revenue. The campus will have positive cash flow by month four and will see a return on its

investment by month 12, inclusive of n month all start-up costs (net income of \$291k). The campus is expected to have an ongoing gross profit of about 84% and ongoing campus profit margin of 35%. Exhibit 8: Southern California Financial Model)

Operational Considerations

Given the proposed location is expected to have a mature census in line with the College's existing mid-size campuses and will be within a city that shares similar census demographics as the Ontario campus, unexpected operational considerations should be limited. There is an opportunity to regionalize some of the positions with existing SJVC campuses in the nearby Southern California area. SJVC has experience with regional models in campuses like Fresno and Madera or Ontario and Temecula.

Accreditation and Approvals

We would need to secure approvals through WASC, BPPE, and USDE. We also expect the Department of Industrial Relations (DiR) to inspect our Electrical lab sometime in September of 2020 and make a motion to approve the lab in the following month. The earliest we anticipate we will be able to launch the Electrical program is November 2020. An execution of a Vocational Nursing program at the proposed location would also require the approval from the Board of Vocational Nursing and Psychiatric Technicians (BVNPT), which takes about nine months from submission.

Facilities and Equipment

During the execution phase, the Senior Leadership team (SLT) will evaluate six potential locations in Riverside and Moreno Valley. The SLT will determine which of the location(s) best fits the College's strategic model, inclusive of the proposed program offerings and the community it will serve. We will submit to ACCJC no more than two promising addresses. The footprint of the proposed campus will around the same size as the Hesperia campus.

The construction timeline (Exhibit 9: Construction Timeline) is considered to be aggressive. In order to occupy the permanent space in time to launch marketing in May of 2020, a lease will need to be executed by August 30, 2019. Although it is not ideal, we can explore the option of an enrollment building in a temporary space.

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Exhibit 1: Competitive Analysis

Exhibit 1A: IPEDS Completions

Moreno Valley Market

| | Tuition | YR14 | YR15 | YR16 | YR17 |
|------------------------------|----------|------|------|------|------|
| Moreno Valley | | | | | |
| Career Care Institute | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$31,000 | 191 | 230 | 159 | 165 |
| MA | \$12,700 | | | | |
| Platt College | | | | | |
| <i>AS Degree</i> | | | | | |
| DMS | \$34,316 | 0 | 8 | 13 | 35 |
| MA | \$26,900 | 44 | 56 | 39 | 31 |
| VT | \$33,875 | 11 | 27 | 25 | 30 |
| MOA | \$26,900 | 30 | 19 | 45 | 22 |
| CJ | \$29,905 | 29 | 28 | 16 | 20 |
| BA | \$29,905 | | | 7 | 11 |
| VN | \$29,950 | | | | |
| PT | \$0 | | | | |
| <i>Certificate</i> | | | | | |
| MOA | \$0 | | | | |
| BA | \$26,296 | | | | |
| VN | \$0 | | | | |
| CJ | \$26,296 | | | | |
| MA | \$19,000 | | | | |
| Moreno Valley College | | | | | |
| <i>AS Degree</i> | | | | | |
| BA | \$0 | 6 | 7 | 14 | 29 |
| MA | \$0 | 8 | 14 | 13 | 15 |
| DH | \$0 | 11 | 8 | 12 | 13 |
| DA | \$0 | 4 | 5 | 0 | 5 |
| <i>Certificate</i> | | | | | |
| MA | \$0 | 15 | 10 | 14 | 28 |
| DA | \$0 | 19 | 17 | 14 | 9 |
| BA | \$0 | 2 | 2 | 4 | 2 |
| Westech College | | | | | |
| <i>Certificate</i> | | | | | |
| MOA | \$0 | 0 | 0 | 0 | |
| BA | \$0 | 21 | 18 | 7 | |
| VT | \$0 | 22 | 24 | 26 | |
| MA | \$0 | 82 | 57 | 42 | |
| MBC | \$0 | 23 | 21 | 0 | |

Ontario Market

*Data suspect

| | Tuition | YR14 | YR15 | YR16 | YR17 |
|--------------------------------|----------|------|------|------|------|
| Ontario | | | | | |
| American Career College | | | | | |
| <i>AS Degree</i> | | | | | |
| ST | \$39,365 | 65 | 58 | 57 | 58 |
| RT | \$49,425 | 83 | 68 | 54 | 47 |
| <i>Certificate</i> | | | | | |
| VN | \$37,525 | 239 | 215 | 235 | 206 |
| MA | \$18,525 | 241 | 194 | 196 | 176 |
| MBC | \$18,525 | 93 | 86 | 113 | 128 |
| PT | \$18,525 | 153 | 99 | 83 | 83 |
| DA | \$18,525 | 91 | 74 | 84 | 63 |
| MT | \$18,525 | | | | |
| Baldy View ROP | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$36,350 | | | | 26 |
| MA | \$0 | | | | 12 |
| DA | \$0 | | | | 3 |
| PT | \$0 | | | | 3 |
| Carrington College | | | | | |
| <i>AS Degree</i> | | | | | |
| VT | \$0 | 42 | 91 | 73 | 95 |
| Chaffey College | | | | | |
| <i>AS Degree</i> | | | | | |
| BA | \$0 | 97 | 157 | 216 | 315 |
| CJ | \$0 | 40 | 44 | 69 | 76 |
| RN | \$0 | 56 | 63 | 63 | 60 |
| RT | \$0 | 18 | 22 | 26 | 47 |
| VN | \$0 | 17 | 33 | 20 | 21 |
| PT | \$0 | 13 | 10 | 12 | 9 |
| DA | \$0 | 9 | 5 | 2 | 7 |
| ET | \$0 | 7 | 3 | 9 | 7 |
| AMT | \$0 | 6 | 3 | 7 | 3 |
| <i>Certificate</i> | | | | | |
| ET | \$0 | 30 | 12 | 70 | 62 |
| BA | \$0 | 10 | 17 | 41 | 51 |
| AMT | \$0 | 10 | 26 | 24 | 33 |
| DA | \$0 | 20 | 18 | 13 | 21 |
| VN | \$16,735 | 69 | 50 | 62 | 18 |
| PT | \$0 | 24 | 15 | 19 | 11 |
| CJ | \$0 | 9 | 6 | 14 | 9 |
| Citrus College | | | | | |
| <i>AS Degree</i> | | | | | |
| VN | \$6,026 | 11 | 8 | 14 | 12 |
| <i>Certificate</i> | | | | | |
| VN | \$6,026 | 39 | 43 | 42 | 56 |

| | | | | | |
|--|----------|-----|-----|----|----|
| Healthstaff Training Institute, Inc.* | | | | | |
| <i>Certificate</i> | | | | | |
| MOA | \$0 | | | | |
| BA | \$0 | | | | |
| PT | \$0 | | | | |
| MA | \$0 | | | | |
| MBC | \$0 | | | | |
| Intercoast Colleges | | | | | |
| <i>Certificate</i> | | | | | |
| ET | \$0 | 40 | 31 | 27 | 47 |
| Kairos Career College | | | | | |
| <i>Certificate</i> | | | | | |
| DA | \$0 | | | | |
| North-West College-Pomona | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$0 | 29 | 45 | 44 | 55 |
| VN | \$0 | 21 | 119 | 32 | 32 |
| DA | \$0 | 32 | 17 | 19 | 22 |
| MBC | \$0 | 6 | 7 | 8 | 12 |
| PT | \$0 | 14 | 9 | 20 | 8 |
| MOA | \$0 | 5 | 4 | 3 | 5 |
| North-West College-West Covina | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$0 | 85 | 80 | 98 | 55 |
| VN | \$0 | 37 | 44 | 94 | 32 |
| DA | \$0 | 45 | 58 | 51 | 22 |
| MBC | \$0 | 19 | 23 | 13 | 12 |
| PT | \$0 | 18 | 35 | 31 | 8 |
| MOA | \$0 | 18 | 17 | 12 | 5 |
| ST | \$0 | 13 | 15 | 16 | |
| Palladium Technical Academy | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$13,500 | 49 | 26 | 39 | 30 |
| MBC | \$13,500 | 23 | 16 | 11 | 8 |
| DA | \$13,500 | 0 | 0 | 0 | 0 |
| Premier Career College | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$0 | 116 | 28 | 59 | 77 |
| ST | \$0 | 70 | 72 | 65 | 35 |
| MA | \$0 | 66 | 39 | 32 | 23 |
| BA | \$0 | 6 | 20 | 16 | 2 |
| MOA | \$0 | 6 | 4 | 1 | 2 |
| San Joaquin Valley College | | | | | |
| <i>AS Degree</i> | | | | | |
| MA | \$0 | 87 | 64 | 80 | 81 |
| CJ | \$0 | 47 | 44 | 60 | 62 |

| | | | | | |
|---|----------|----|----|-----|-----|
| RT | \$0 | 81 | 39 | 66 | 44 |
| RN | \$0 | 0 | 0 | 80 | 40 |
| BA | \$0 | 57 | 38 | 40 | 35 |
| DH | \$0 | 42 | 24 | 23 | 18 |
| PT | \$0 | 23 | 22 | 22 | 14 |
| CM | \$0 | 11 | 8 | 8 | 11 |
| MOA | \$0 | 15 | 12 | 4 | 9 |
| ET | \$0 | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$0 | 2 | 3 | 17 | 8 |
| MOA | \$0 | 1 | | 6 | 3 |
| PT | \$0 | 3 | 2 | 1 | 3 |
| BA | \$0 | 0 | 2 | 2 | 1 |
| ET | \$0 | | | | |
| UEI College- Ontario | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$19,900 | | 29 | 113 | 87 |
| DA | \$19,900 | | 17 | 65 | 49 |
| BA | \$19,900 | 0 | 90 | 38 | 34 |
| CJ | \$19,900 | | 43 | 32 | 23 |
| MOA | \$19,900 | | | 8 | 21 |
| UEI College- West Covina | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$0 | 0 | 0 | 0 | 113 |
| DA | \$0 | 0 | 0 | 0 | 60 |
| BA | \$0 | 0 | 0 | 0 | 41 |
| CJ | \$0 | 0 | 0 | 0 | 31 |
| MBC | \$0 | 0 | 0 | 0 | 29 |
| PT | \$0 | 0 | 0 | 0 | 28 |
| West Coast Ultrasound Institute- Ontario | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$27,385 | 22 | 15 | 16 | 26 |
| Westtech College | | | | | |
| <i>Certificate</i> | | | | | |
| MOA | \$0 | 0 | 0 | 32 | |
| BA | \$0 | 30 | 25 | 10 | |
| VT | \$0 | 84 | 92 | 97 | |
| MA | \$0 | 97 | 68 | 50 | |
| MBC | \$0 | 34 | 31 | 0 | |
| Platt College | | | | | |
| <i>AS Degree</i> | | | | | |
| RT | \$45,775 | 57 | 41 | 33 | 43 |
| DMS | \$34,316 | 24 | 23 | 32 | 34 |
| VT | \$33,875 | 33 | 27 | 33 | 26 |
| MA | \$0 | 28 | 36 | 33 | 22 |
| CJ | \$29,905 | 28 | 26 | 25 | 19 |
| MOA | \$0 | 24 | 16 | 10 | 14 |
| BA | \$29,905 | | | 6 | 7 |
| PT | \$0 | | | | |
| VN | \$29,950 | | | | |

| | | | | | |
|--|----------|----|----|----|----|
| <i>BS Degree</i> | | | | | |
| DMS | \$63,655 | 15 | 13 | 13 | 20 |
| CJ | \$0 | 12 | 8 | 8 | 10 |
| BA | \$54,760 | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$0 | | | | |
| MOA | \$26,900 | | | | |
| CJ | \$26,296 | | | | |
| MA | \$19,000 | 0 | 0 | 0 | |
| Universal Schools and Colleges of Health and Human Services, Inc. | | | | | |
| <i>Certificate</i> | | | | | |
| MOA | \$0 | | | | |
| MBC | \$0 | | | | |
| BA | \$0 | | | | |
| MA | \$0 | | | | |

Riverside Market

| | Tuition | YR14 | YR15 | YR16 | YR17 |
|--|----------|------|------|------|------|
| Riverside | | | | | |
| UEI College- Riverside | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$19,900 | 0 | 165 | 175 | 193 |
| DA | \$19,900 | 0 | 64 | 70 | 75 |
| BA | \$19,900 | 0 | 60 | 52 | 71 |
| PT | \$19,900 | 0 | 97 | 69 | 65 |
| CJ | \$19,900 | 0 | 38 | 38 | 32 |
| MBC | \$19,900 | 0 | 43 | 37 | 21 |
| | | | | | |
| Riverside City College | | | | | |
| <i>AS Degree</i> | | | | | |
| RN | \$0 | 159 | 170 | 176 | 161 |
| BA | \$0 | 15 | 13 | 27 | 67 |
| CJ | \$0 | 28 | 13 | 39 | 49 |
| VN | \$3,118 | 48 | 48 | 30 | 28 |
| ET | \$0 | 1 | 0 | 0 | 0 |
| <i>Certificate</i> | | | | | |
| BA | \$0 | 15 | 10 | 23 | 26 |
| CJ | \$0 | 21 | 21 | 20 | 18 |
| VN | \$0 | 33 | 45 | 36 | 13 |
| | | | | | |
| North-West College- Riverside | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$33,900 | 79 | 84 | 101 | 159 |
| MA | \$15,995 | 43 | 85 | 78 | 87 |
| PT | \$15,995 | 11 | 15 | 28 | 38 |
| ST | \$31,900 | 9 | 7 | 18 | 25 |
| MBC | \$15,995 | 0 | 1 | 11 | 12 |
| MOA | \$15,995 | 0 | 10 | 6 | 5 |
| DA | | | | | |
| MT | \$15,995 | | | | |
| | | | | | |
| American College of Healthcare and Technology | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$16,095 | 0 | 37 | 41 | 41 |
| ST | \$32,545 | 51 | 62 | 72 | 23 |
| VT | \$16,095 | 0 | 0 | 23 | 22 |
| MBC | \$16,095 | 27 | 32 | 21 | 22 |
| PT | \$16,095 | 38 | 37 | 14 | 12 |
| DA | \$16,095 | 0 | 0 | 0 | 8 |
| | | | | | |
| Norco College | | | | | |
| <i>AS Degree</i> | | | | | |
| BA | \$0 | 3 | 10 | 20 | 62 |
| CJ | \$0 | 5 | 4 | 1 | 4 |
| ET | \$0 | 3 | 1 | 7 | 1 |
| <i>Certificate</i> | | | | | |

| | | | | | |
|--|----------|----|----|----|----|
| ET | \$0 | 7 | 1 | 16 | 43 |
| BA | \$0 | 7 | 10 | 11 | 8 |
| CJ | \$0 | 4 | 2 | 1 | 3 |
| Palo Verde College | | | | | |
| <i>AS Degree</i> | | | | | |
| BA | \$0 | 14 | 15 | 11 | 10 |
| CJ | \$0 | 2 | 2 | 4 | 5 |
| <i>Certificate</i> | | | | | |
| BA | \$0 | 43 | 53 | 39 | 40 |
| VN | \$0 | 3 | 9 | 1 | 11 |
| CJ | \$0 | 1 | 5 | 1 | 3 |
| California Technical Academy | | | | | |
| <i>Certificate</i> | | | | | |
| BA | \$0 | | 77 | 65 | 46 |
| Intercoast Colleges | | | | | |
| <i>Certificate</i> | | | | | |
| ET | \$19,500 | 46 | 33 | 74 | 35 |
| DA | \$16,250 | | 0 | 5 | 7 |
| Mission Career College | | | | | |
| <i>Certificate</i> | | | | | |
| PT | \$0 | | | | |
| MT | \$0 | | | | |
| BA | \$0 | | | | |
| MA | \$0 | | | | |
| Spartan College of Aeronautics and Technology | | | | | |
| <i>AS Degree</i> | | | | | |
| AMT | \$0 | | | | |
| Ryon College | | | | | |
| <i>Certificate</i> | | | | | |
| MBC | \$0 | | | | |
| MA | \$0 | | | | |
| BA | \$0 | | | | |
| ET | \$0 | | | | |
| Universal Schools and Colleges of Health and Human Services, Inc. | | | | | |
| <i>Certificate</i> | | | | | |
| MOA | \$0 | | | | |
| BA | \$0 | | | | |
| VT | \$0 | | | | |
| MA | \$0 | | | | |
| MBC | \$0 | | | | |
| Glen Oaks College | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$0 | | | | |
| PT | \$0 | | | | |
| MBC | \$0 | | | | |
| Brightwood College* | | | | | |

| | | | | | |
|---|----------|----|----|----|--|
| <i>AS Degree</i> | | | | | |
| MA | \$0 | | | | |
| <i>Certificate</i> | | | | | |
| MBC | \$0 | | | | |
| MA | \$0 | 65 | 57 | 86 | |
| DA | \$0 | 30 | 15 | 35 | |
| ET | \$0 | | | | |
| Western Electrical Contractors | | | | | |
| <i>Apprenticeship</i> | | | | | |
| ET | \$0 | | | | |
| Masters Vocational College, Inc. | | | | | |
| <i>Certificate</i> | | | | | |
| MBC | \$0 | | | | |
| BA | \$0 | | | | |
| PT | \$0 | | | | |
| ET | \$0 | | | | |
| MA | \$0 | | | | |
| Riverside School of Career Education-Alessandro | | | | | |
| <i>Certificate</i> | | | | | |
| PT | \$0 | | | | |
| DA | \$0 | | | | |
| Beamont Adult School | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$26,500 | 60 | 53 | 29 | |

San Bernardino Market

| | Tuition | YR14 | YR15 | YR16 | YR17 |
|---|----------|------|------|------|------|
| San Bernardino | | | | | |
| Concorde Career College | | | | | |
| <i>AS Degree</i> | | | | | |
| RT | \$45,505 | 93 | 59 | 42 | 27 |
| DH | \$72,158 | 47 | 23 | 42 | 24 |
| ST | \$34,557 | 26 | 18 | 26 | 18 |
| <i>Certificate</i> | | | | | |
| MOA | \$15,483 | 33 | 50 | 35 | 126 |
| DA | \$15,714 | 93 | 153 | 159 | 122 |
| VN | \$31,191 | 51 | 90 | 68 | 57 |
| MA | \$16,322 | 182 | 144 | 124 | 35 |
| DeVry University-Colton | | | | | |
| <i>AS Degree</i> | | | | | |
| BA | \$0 | | | | |
| <i>BS Degree</i> | | | | | |
| BA | \$0 | | | | |
| East Valley College | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$0 | | | | |
| Inland Career Education Center | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$6,000 | | | | |
| MA | \$0 | | | | |
| Loma Linda University-San Manuel Gateway | | | | | |
| <i>Certificate</i> | | | | | |
| ST | \$0 | | | | |
| PT | \$0 | | | | |
| DH | \$0 | | | | |
| MA | \$0 | | | | |
| San Bernardino County ROP | | | | | |
| <i>Certificate</i> | | | | | |
| PT | \$0 | | | | |
| DA | \$0 | | | | |
| San Bernardino Valley College | | | | | |
| <i>AS Degree</i> | | | | | |
| BA | \$0 | 59 | 78 | 87 | 125 |
| RN | \$0 | 73 | 58 | 72 | 92 |
| PT | \$0 | 20 | 8 | 19 | 12 |
| ET | \$0 | 6 | 6 | 5 | 4 |
| <i>Certificate</i> | | | | | |
| ET | \$0 | 12 | 15 | 16 | 14 |
| PT | \$0 | 23 | 2 | 5 | 8 |
| BA | \$0 | 1 | 4 | 1 | 1 |

| | | | | | |
|-------------------------------------|----------|-----|-----|----|-----|
| CJ | \$0 | 3 | 3 | 0 | 0 |
| Southeast California College | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$0 | | | | |
| MOA | | | | | |
| DA | \$950 | | | | |
| MA | \$1,768 | | | | |
| Summit College | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$33,522 | 266 | 197 | 91 | 201 |
| ET | \$12,810 | | | | 133 |
| MA | \$13,518 | 53 | 38 | 27 | 36 |
| DA | \$13,519 | 19 | 24 | 11 | 21 |
| BA | \$11,587 | 0 | 8 | 7 | 10 |

Exhibit 1B: SPFS Data

Moreno Valley Market

| | Tuition | Weeks | YR 15 | YR 16 | YR17 |
|------------------------------|-----------|-------|-------|-------|------|
| Moreno Valley | | | | | |
| Platt College | | | | | |
| AS Degree | | | | | |
| DMS | \$ 34,241 | 72 | 44 | 41 | 75 |
| MA | \$ 26,825 | 60 | 88 | 42 | 60 |
| VT | \$ 33,800 | 72 | 34 | 40 | 57 |
| MOA | \$ 26,825 | 60 | 53 | 39 | 48 |
| CJ | \$ 29,830 | 72 | 34 | 27 | 43 |
| BA | \$ 29,830 | 60 | 7 | 28 | 17 |
| VN | \$ 29,875 | 68 | | | |
| PT | \$ 27,535 | 60 | | | |
| Certificate | | | | | |
| MOA | \$ 18,925 | 44 | | | |
| BA | \$ 26,221 | 40 | | | |
| VN | \$ 26,470 | 56 | | | |
| CJ | \$ 26,221 | 52 | | | |
| MA | \$ 18,925 | 44 | | | |
| Career Care Institute | | | | | |
| Certificate | | | | | |
| VN | \$ 31,000 | 62 | | 59 | 63 |
| MA | \$ 12,500 | 36 | | 11 | 15 |
| Westech College | | | | | |
| Certificate | | | | | |
| MOA | | | | | |
| BA | | | | | |
| VT | | | | | |
| MA | | | | | |
| MBC | | | | | |

Ontario Market

*Data suspect

| | Tuition | Weeks | YR 15 | YR 16 | YR17 |
|--|-----------|-------|-------|-------|------|
| Ontario | | | | | |
| American Career College | | | | | |
| <i>AS Degree</i> | | | | | |
| ST | \$ 39,365 | 80 | 109 | 142 | 97 |
| RT | \$ 49,425 | 80 | 87 | 79 | 63 |
| <i>Certificate</i> | | | | | |
| MA | \$ 18,525 | 36 | 243 | 255 | 208 |
| VN | \$ 36,675 | 54 | 322 | 301 | 158 |
| MBC | \$ 18,525 | 36 | 134 | 185 | 119 |
| PT | \$ 18,525 | 36 | 101 | 121 | 81 |
| DA | \$ 18,125 | 40 | 105 | 93 | 67 |
| MT | \$ 18,125 | 36 | 78 | 72 | |
| Carrington College | | | | | |
| <i>AS Degree</i> | | | | | |
| VT | \$ 35,006 | 88 | 194 | 183 | 164 |
| Healthstaff Training Institute* | | | | | |
| <i>Certificate</i> | | | | | |
| BA | \$ 6,995 | 20 | 6 | 51 | 85 |
| MA | \$ 16,790 | 61 | 15 | 17 | 42 |
| MBC | \$ 6,395 | 12 | | 14 | 16 |
| MOA | \$ 7,395 | 25 | 4 | 2 | 12 |
| PT | \$ 6,395 | 27 | 0 | 5 | 3 |
| Intercoast Colleges | | | | | |
| <i>Certificate</i> | | | | | |
| ET | \$ 19,500 | 50 | 56 | 56 | 60 |
| HVAC | \$ 15,600 | 45 | 43 | 25 | 23 |
| Kairos Career College | | | | | |
| <i>Certificate</i> | | | | | |
| DA | | | | | |
| North-West College-Pomona | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 15,995 | 40 | 64 | 78 | 79 |
| VN | \$ 33,900 | 64 | 106 | 79 | 64 |
| DA | \$ 15,995 | 40 | 23 | 27 | 30 |
| MBC | \$ 15,995 | 40 | 11 | 9 | 16 |
| PT | \$ 15,995 | 40 | 19 | 16 | 13 |
| MOA | \$ 15,995 | 40 | 6 | 7 | 5 |
| North-West College-West Covina | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 15,995 | 40 | 123 | 160 | 142 |
| VN | \$ 33,900 | 64 | 127 | 116 | 129 |
| PT | \$ 15,995 | 40 | 33 | 36 | 61 |
| DA | \$ 15,995 | 40 | 81 | 70 | 55 |

| | | | | | |
|------------------------------------|----------------------|---------------|----------------|---------------|-----|
| MBC | \$ 15,995 | 40 | | 27 | 33 |
| ST | \$ 31,900 | 60 | 31 | 26 | 23 |
| MOA | \$ 15,995 | 40 | 21 | 21 | 11 |
| Palladium Technical Academy | | | | | |
| <i>Certificate</i> | | | | | |
| DA | \$ 13,500 | 36 | 0 | 0 | |
| MBC | \$ 12,500 | 33 | 12 | 15 | |
| MA | \$ 12,500 | 33 | 36 | 47 | |
| Premier Career College | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$ 32,590 | 60 | 40 | 81 | 122 |
| ST | \$ 23,255 | 54 | 73 | 42 | 87 |
| MA | \$ 15,395 | 34 | 40 | 29 | 41 |
| BA | \$ 9,740 | 24 | 13 | 9 | 13 |
| MOA | \$ 13,345 | 28 | 2 | 2 | 2 |
| San Joaquin Valley College | | | | | |
| <i>AS Degree</i> | | | | | |
| CJ | \$ 34,100 | 60 | 73 | 90 | 77 |
| RT | \$ 43,275 | 80 | 89 | 48 | 63 |
| DH | \$ 61,100 | 67 | 37 | 11 | 41 |
| CM | \$ 32,800 | 60 | | 16 | 29 |
| HVAC | \$ 33,300 | 60 | | 25 | 22 |
| RN | \$ 58,195 | 87 | 50 | 72 | 1 |
| ET | \$ 33,300 | 60 | | | |
| PT | \$ 32,800 | 60 | 32 | 22 | |
| MA | \$ 32,800 | 60 | 121 | 92 | |
| BA | \$ 32,800 | 60 | 67 | 75 | |
| MOA | \$ 32,800 | 60 | 11 | 12 | |
| <i>Certificate</i> | | | | | |
| MA | \$ 17,900 | 30 | 11 | 24 | 35 |
| HVAC | \$ 22,855 | 37 | | 10 | 28 |
| ET | \$ 22,855 | 40 | | | 24 |
| MOA | \$ 17,900 | 30 | 5 | 5 | 12 |
| PT | \$ 17,900 | 30 | 3 | 6 | 10 |
| BA | \$ 14,460 | 30 | 4 | 6 | 10 |
| UEI College- Ontario | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 19,900 | 39 | 106 | 148 | 140 |
| DA | \$ 19,900 | 39 | 72 | 78 | 52 |
| BA | \$ 19,900 | 40 | 85 | 65 | 50 |
| CJ | \$ 19,900 | 41 | 60 | 41 | 35 |
| HVAC | \$ 19,900 | 41 | | | 30 |
| MOA | \$ 19,900 | 39 | 0 | 25 | 24 |
| UEI College- West Covina | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 19,900 | 34 | | 158 | 155 |
| DA | \$ 19,900 | 34 | | 89 | 71 |

| | | | | | |
|--|-----------|-----|----|----|----|
| MBC | \$ 19,900 | 34 | | 52 | 44 |
| BA | \$ 19,900 | 34 | | 70 | 44 |
| PT | \$ 19,900 | 34 | | 45 | 29 |
| CJ | \$ 19,900 | 36 | | 44 | 26 |
| HVAC | \$ 19,900 | 36 | | | |
| West Coast Ultrasound Institute- Ontario | | | | | |
| <i>Certificate</i> | | | | | |
| VN | | 60 | | | |
| Platt College | | | | | |
| <i>AS Degree</i> | | | | | |
| DMS | \$ 34,241 | 72 | 59 | 61 | 90 |
| RT | \$ 45,700 | 68 | 62 | 61 | 74 |
| VT | \$ 33,800 | 72 | 42 | 44 | 43 |
| MA | \$ 26,825 | 60 | 56 | 42 | 29 |
| CJ | \$ 29,830 | 60 | 28 | 34 | 28 |
| BA | \$ 29,830 | 60 | 0 | 12 | 20 |
| MOA | \$ 26,825 | 60 | 24 | 23 | 19 |
| PT | \$ 27,535 | 60 | | | |
| VN | \$ 29,875 | 68 | | | |
| <i>BS Degree</i> | | | | | |
| DMS | \$ 63,580 | 124 | 13 | 12 | 19 |
| CJ | \$ 54,685 | | 8 | 7 | 15 |
| BA | \$ 45,525 | 124 | 0 | | |
| <i>Certificate</i> | | | | | |
| VN | \$ 26,470 | 56 | | | |
| MOA | \$ 18,925 | 44 | | | |
| CJ | \$ 26,221 | 52 | 0 | | |
| MA | \$ 18,925 | 44 | | | |
| Universal Schools and Colleges of Health and Human Services, Inc. | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 2,995 | 16 | | 33 | 30 |
| MOA | \$ 5,995 | 8 | | 26 | 17 |
| BA | | 18 | | 12 | |
| MBC | | 16 | | 12 | |
| Westech College | | | | | |
| <i>Certificate</i> | | | | | |
| MBC | | | | | |
| VT | | | | | |
| MOA | | | | | |
| HVAC | | | | | |
| BA | | | | | |
| MA | | | | | |

Riverside Market

| | Tuition | Weeks | YR 15 | YR 16 | YR17 |
|--|-----------|-------|-------|-------|------|
| Riverside | | | | | |
| American College of Healthcare and Technology | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 16,545 | 36 | 84 | 43 | 54 |
| VT | \$ 16,545 | 36 | 29 | 23 | 29 |
| ST | \$ 32,545 | 68 | 48 | 44 | 20 |
| MBC | \$ 16,545 | 36 | 45 | 30 | 18 |
| DA | \$ 16,545 | 34 | | 7 | 11 |
| PT | \$ 16,545 | 36 | 45 | 17 | 7 |
| HVAC | \$ 16,545 | 36 | | | |
| Brightwood College | | | | | |
| <i>AS Degree</i> | | | | | |
| MA | \$ 26,899 | 77 | | | |
| <i>Certificate</i> | | | | | |
| MBC | \$ 15,449 | 36 | 39 | 36 | |
| MA | \$ 15,892 | 36 | 69 | 121 | |
| DA | \$ 17,265 | 40 | 31 | 32 | |
| ET | \$ 16,542 | 36 | | | |
| California Technical Academy | | | | | |
| <i>Certificate</i> | | | | | |
| BA | \$ 21,960 | 117 | 89 | 79 | |
| Glen Oaks College | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 8,000 | 36 | 4 | 5 | |
| PT | \$ 8,000 | 36 | 4 | 5 | |
| MBC | | 36 | | | |
| Intercoast Colleges | | | | | |
| <i>Certificate</i> | | | | | |
| ET | \$ 19,500 | 50 | 107 | 48 | 24 |
| HVAC | \$ 15,600 | 40 | 37 | 29 | 20 |
| DA | \$ 16,250 | 30 | 1 | 7 | 7 |
| Masters Vocational College, Inc. | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 19,900 | | 0 | 0 | |
| PT | \$ 19,900 | | | | |
| MBC | \$ 11,900 | | | | |
| ET | \$ 19,900 | 36 | 0 | 1 | |
| BA | \$ 11,900 | | | | |
| HVAC | \$ 11,900 | 26 | 10 | 5 | |
| Mission Career College | | | | | |
| <i>Certificate</i> | | | | | |
| PT | \$ 1,850 | 36 | | 64 | 47 |
| MT | \$ 8,600 | 36 | | | |
| BA | \$ 8,600 | 36 | | 1 | 0 |

| | | | | | |
|--|-----------|----|-----|-----|-----|
| MA | \$ 13,350 | 40 | | 0 | 0 |
| North-West College- Riverside | | | | | |
| <i>Certificate</i> | | | | | |
| VN | \$ 33,900 | 64 | 145 | 213 | 220 |
| MA | \$ 15,995 | 40 | 116 | 122 | 155 |
| PT | \$ 15,995 | 40 | 22 | 44 | 36 |
| ST | \$ 31,900 | 60 | 31 | 24 | 25 |
| MBC | \$ 15,995 | 40 | 11 | 19 | 25 |
| MOA | \$ 15,995 | 40 | 12 | 9 | 5 |
| MT | \$ 15,995 | 40 | 1 | 9 | 3 |
| DA | | 40 | | | |
| Ryon College | | | | | |
| <i>Certificate</i> | | | | | |
| BA | \$ 5,565 | 16 | 515 | 85 | 62 |
| ET | \$ 5,565 | 17 | 60 | 22 | 28 |
| MBC | \$ 5,565 | 15 | 56 | 24 | 18 |
| MA | \$ 5,565 | 20 | 50 | 16 | 14 |
| UEI College- Riverside | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 19,900 | 39 | 220 | 275 | 305 |
| DA | \$ 19,900 | 39 | 108 | 126 | 126 |
| PT | \$ 19,900 | 39 | 100 | 102 | 78 |
| BA | \$ 19,900 | 40 | 82 | 120 | 69 |
| CJ | \$ 19,900 | 41 | 71 | 58 | 58 |
| MBC | \$ 19,900 | 39 | 53 | 41 | 48 |
| HVAC | \$ 19,900 | 41 | | | |
| Universal Schools and Colleges of Health and Human Services, Inc. | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 2,995 | 16 | 9 | 49 | 25 |
| BA | \$ 12,990 | 18 | | 13 | 16 |
| MBC | \$ 5,995 | 8 | | 9 | 8 |
| VT | | 8 | | | |
| MOA | | 16 | | | |

San Bernardino Market

| | Tuition | Weeks | YR 15 | YR 16 | YR17 |
|--|-----------|-------|-------|-------|------|
| San Bernardino | | | | | |
| Center For Employment Training- Colton | | | | | |
| <i>Certificate</i> | | | | | |
| HVAC | \$ 13,182 | 30 | | 30 | 22 |
| Concorde Career College | | | | | |
| <i>AS Degree</i> | | | | | |
| DH | \$ 65,041 | 70 | 22 | 48 | |
| ST | \$ 55,842 | 114 | 23 | 37 | |
| RT | \$ 43,304 | 70 | 52 | 51 | |
| <i>Certificate</i> | | | | | |
| VN | \$ 29,859 | 50 | 111 | 85 | |
| MOA | \$ 16,715 | 30 | | 49 | |
| DA | \$ 14,365 | 36 | 172 | 171 | |
| MA | \$ 16,383 | 30 | 138 | 169 | |
| DeVry University- Colton | | | | | |
| <i>AS Degree</i> | | | | | |
| BA | \$ 34,104 | | | | |
| <i>BS Degree</i> | | | | | |
| BA | \$ 79,706 | | | 67 | 95 |
| East Valley College | | | | | |
| <i>Certificate</i> | | | | | |
| MA | \$ 12,434 | | | | |
| Southeast California College | | | | | |
| <i>Certificate</i> | | | | | |
| MA | | 46 | 40 | 32 | 122 |
| MOA | | 4 | 2 | 3 | 3 |
| VN | | 51 | | | |
| DA | | 16 | 2 | 14 | |
| Summit College | | | | | |
| <i>Certificate</i> | | | | | |
| ET | \$ 12,845 | 36 | | 11 | 110 |
| MA | \$ 13,584 | 36 | 61 | 53 | 39 |
| HVAC | \$ 12,845 | 36 | 57 | 59 | 39 |
| DA | \$ 13,584 | 36 | 26 | 34 | 27 |
| BA | \$ 11,588 | 30 | 13 | 18 | 22 |
| VN | \$ 33,737 | 84 | 225 | 355 | |

Exhibit 2: Google Search Demand Results

| Consumer Demand | Searches | Impressions | Clicks |
|---------------------------------|----------------|---------------|--------------|
| Riverside | 110,753 | 79,104 | 1,562 |
| Register Nursing | 54,850 | 41,112 | 708 |
| Licensed Vocational Nursing | 17,835 | 14,089 | 162 |
| Criminal Justice Corrections | 9,036 | 3,919 | 141 |
| Electrical Technology | 2,250 | 1,946 | 119 |
| Dental Assisting | 6,522 | 4,746 | 64 |
| Industrial Maintance Technology | 933 | 785 | 58 |
| HVAC | 1,219 | 928 | 53 |
| Medical Assisting | 4,025 | 2,246 | 51 |
| Surgical Technology | 2,131 | 1,929 | 42 |
| Business Administration | 3,282 | 2,103 | 38 |
| Medical Office Administration | 2,283 | 1,120 | 35 |
| Dental Hygiene | 1,090 | 963 | 34 |
| Veterinary Technology | 2,350 | 1,543 | 29 |
| Pharmacy Technology | 2,947 | 1,675 | 28 |
| San Bernardino | 106,562 | 76,147 | 1,509 |
| Register Nursing | 52,757 | 39,605 | 685 |
| Licensed Vocational Nursing | 17,127 | 13,557 | 159 |
| Criminal Justice Corrections | 8,955 | 3,881 | 140 |
| Electrical Technology | 2,081 | 1,800 | 115 |
| Dental Assisting | 6,403 | 4,662 | 65 |
| HVAC | 1,162 | 884 | 49 |
| Industrial Maintance Technology | 858 | 719 | 49 |
| Medical Assisting | 3,738 | 2,088 | 46 |
| Surgical Technology | 2,041 | 1,847 | 40 |
| Business Administration | 3,087 | 1,982 | 37 |
| Medical Office Administration | 2,218 | 1,085 | 34 |
| Dental Hygiene | 1,069 | 943 | 33 |
| Veterinary Technology | 2,269 | 1,500 | 31 |
| Pharmacy Technology | 2,797 | 1,594 | 26 |

| Consumer Demand | Searches | Impressions | Clicks |
|---------------------------------|---------------|---------------|--------------|
| Ontario | 47,374 | 27,202 | 1,065 |
| Electrical Technology | 4,616 | 4,004 | 281 |
| Criminal Justice Corrections | 15,186 | 6,618 | 249 |
| Industrial Maintance Technology | 1,732 | 1,458 | 122 |
| HVAC | 2,369 | 1,816 | 113 |
| Medical Assisting | 6,968 | 3,799 | 93 |
| Business Administration | 7,024 | 4,484 | 81 |
| Pharmacy Technology | 5,360 | 3,063 | 64 |
| Medical Office Administration | 4,119 | 1,960 | 62 |
| Temecula | 37,441 | 21,604 | 756 |
| Electrical Technology | 3,136 | 2,256 | 147 |
| Criminal Justice Corrections | 9,243 | 3,844 | 144 |
| Medical Assisting | 5,224 | 2,986 | 97 |
| Surgical Technology | 1,639 | 1,534 | 86 |
| HVAC | 1,673 | 1,191 | 70 |
| Medical Office Administration | 3,359 | 2,100 | 60 |
| Pharmacy Technology | 3,399 | 1,684 | 53 |
| Business Administration | 5,734 | 3,810 | 52 |
| Dental Assisting | 4,034 | 2,199 | 47 |

Exhibit 3: Census Data

Exhibit 3A: Total Population

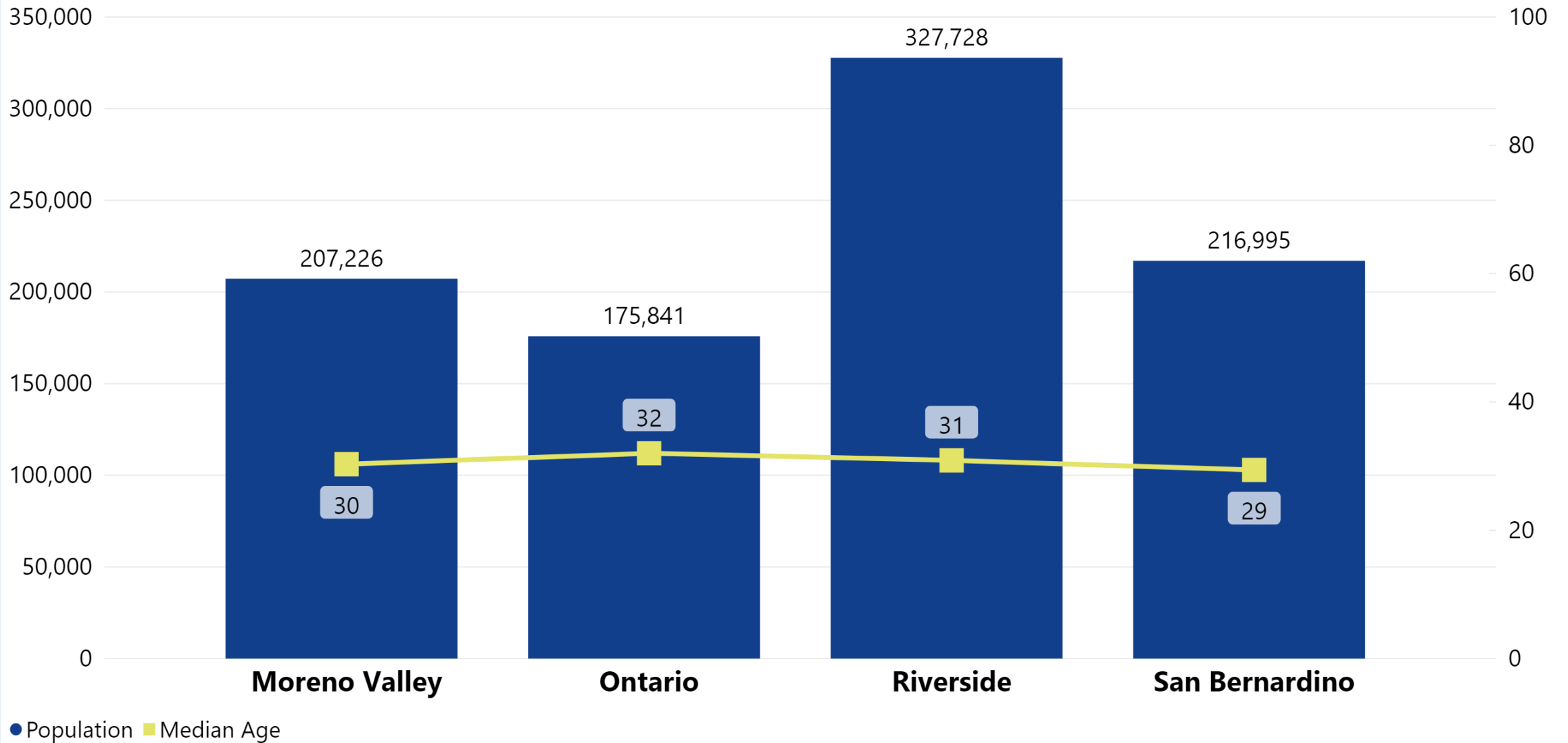


Exhibit 3B: Addressable Market

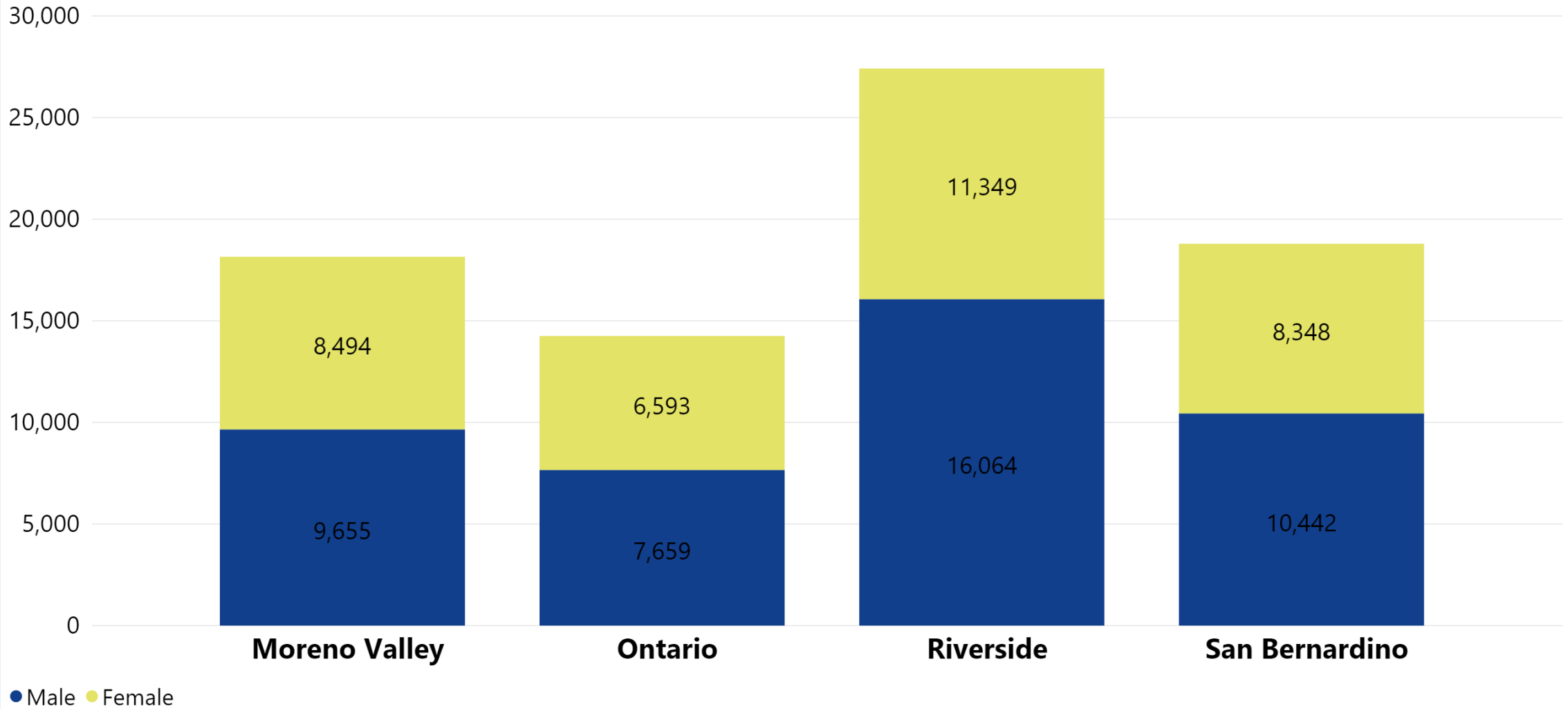


Exhibit 3C: Market Composition

| Markets | Total Population | Addressable Market |
|-----------------------|------------------|--------------------|
| Riverside | 1,036,231 | 83,072 |
| Riverside | 327,728 | 27,413 |
| Moreno Valley | 207,226 | 18,149 |
| Corona | 167,836 | 12,515 |
| Jurupa Valley | 106,028 | 9,570 |
| Perris | 77,879 | 6,770 |
| Eastvale | 63,211 | 3,423 |
| Beaumont | 46,967 | 2,393 |
| Norco | 26,761 | 2,034 |
| Grand Terrace | 12,595 | 805 |
| San Bernardino | 702,492 | 54,015 |
| San Bernardino | 216,995 | 18,790 |
| Fontana | 211,815 | 16,987 |
| Colton | 54,828 | 4,710 |
| Redlands | 71,554 | 4,448 |
| Highland | 55,342 | 4,039 |
| Yucaipia | 53,683 | 3,358 |
| Loma Linda | 24,196 | 1,030 |
| Calimesa | 8,817 | 426 |
| Big Bear Lake | 5,262 | 227 |
| Grand Total | 1,738,723 | 137,087 |

Total Population: 1.7M
Addressable Market: 137K

Exhibit 3D: Median Household Income

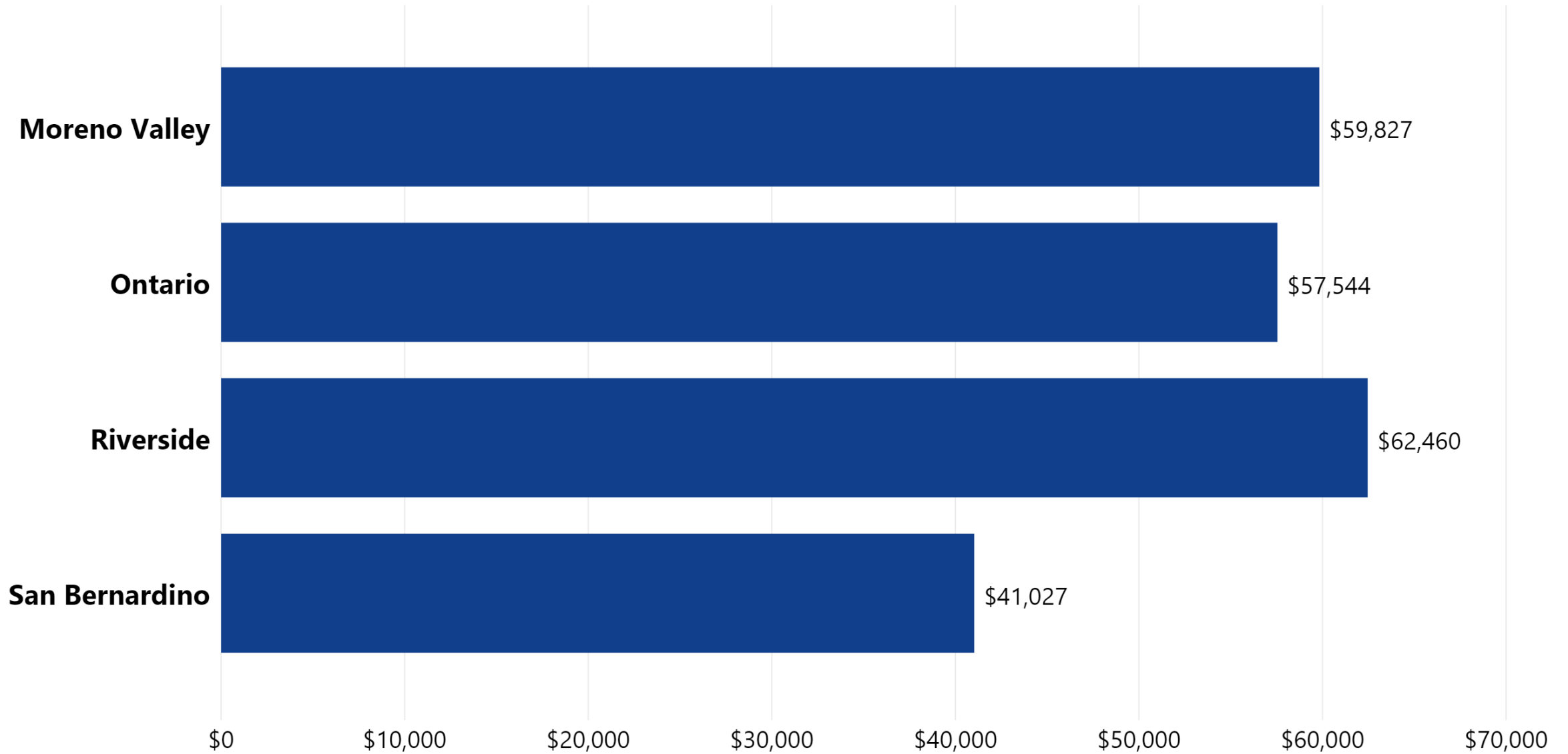


Exhibit 3E: Median Monthly Rent

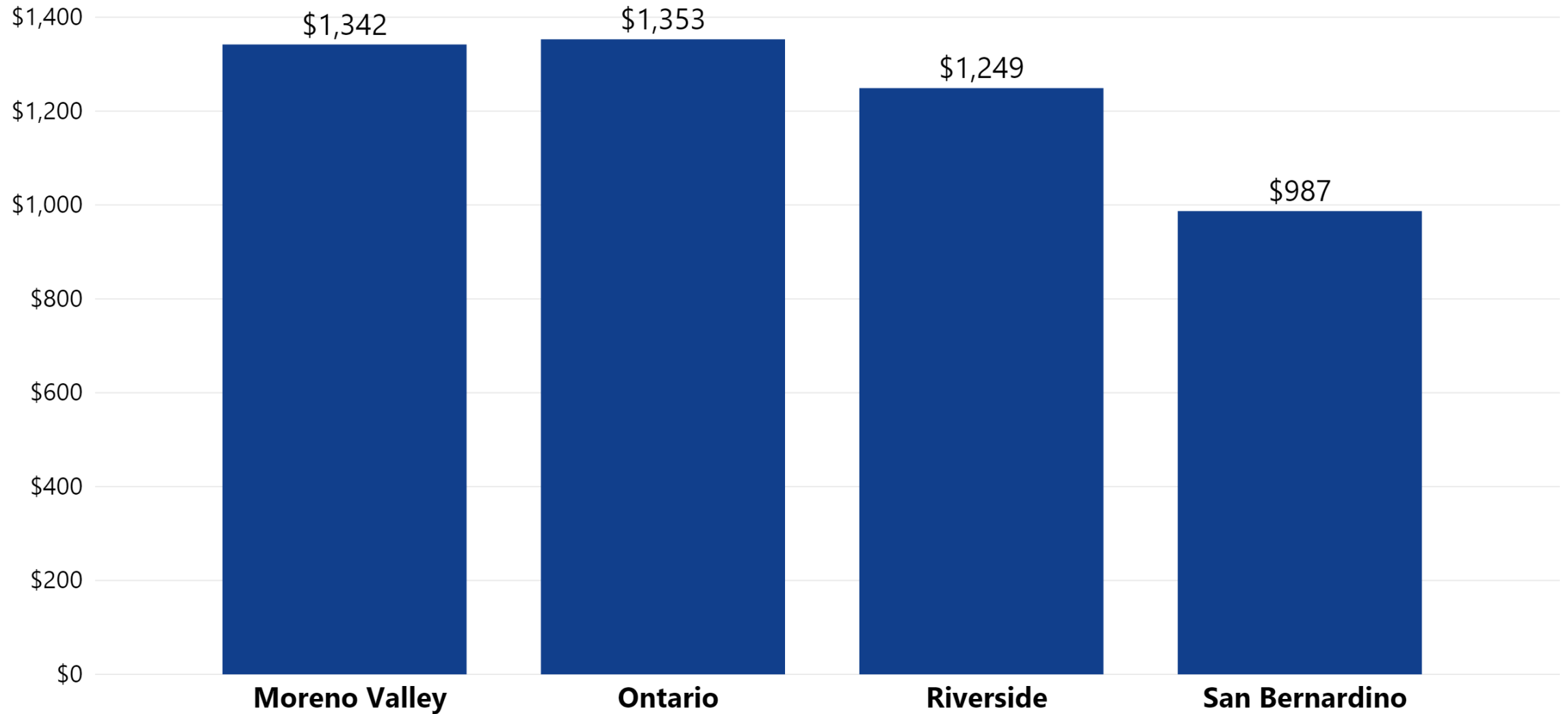


Exhibit 3F: Housing

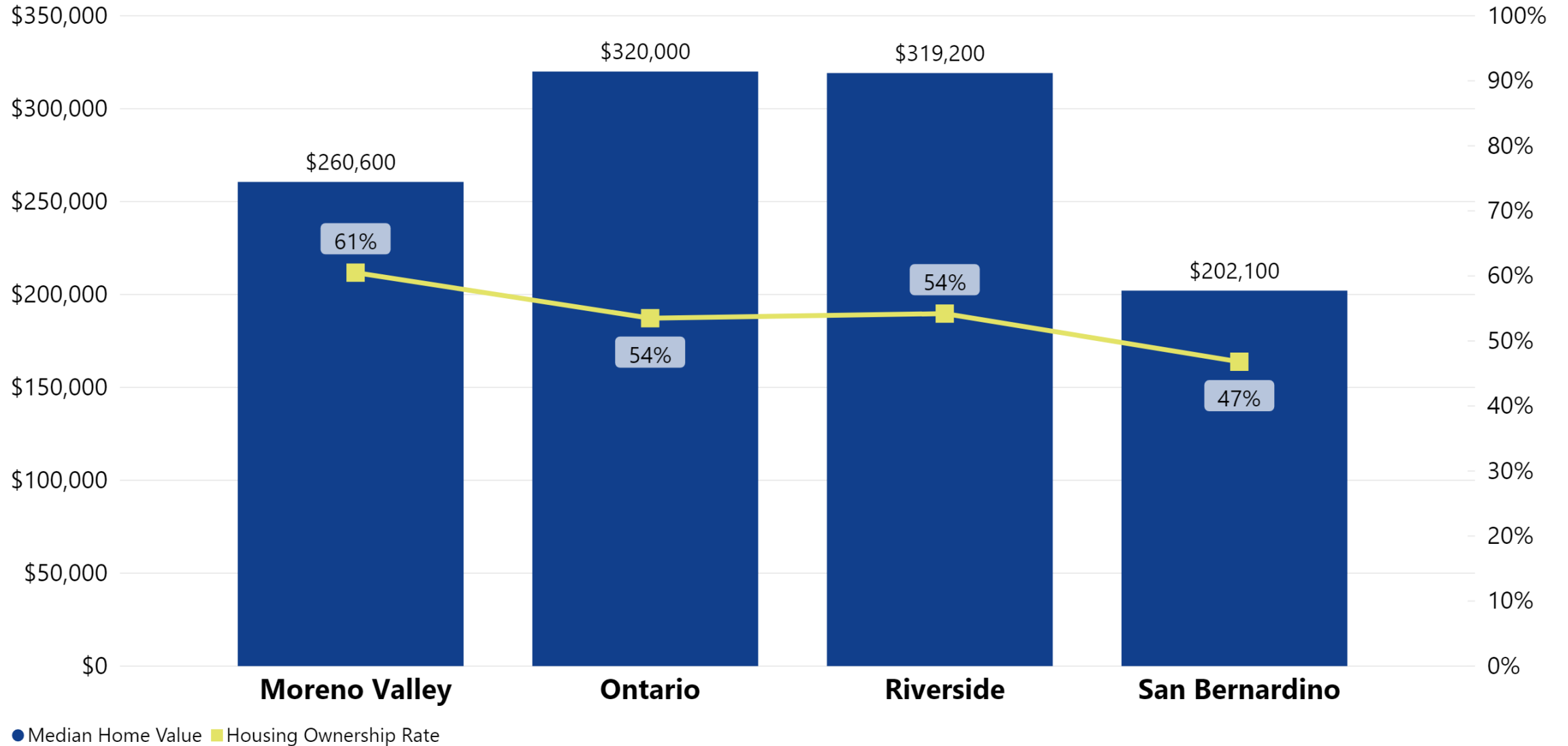


Exhibit 3G: Persons in Poverty

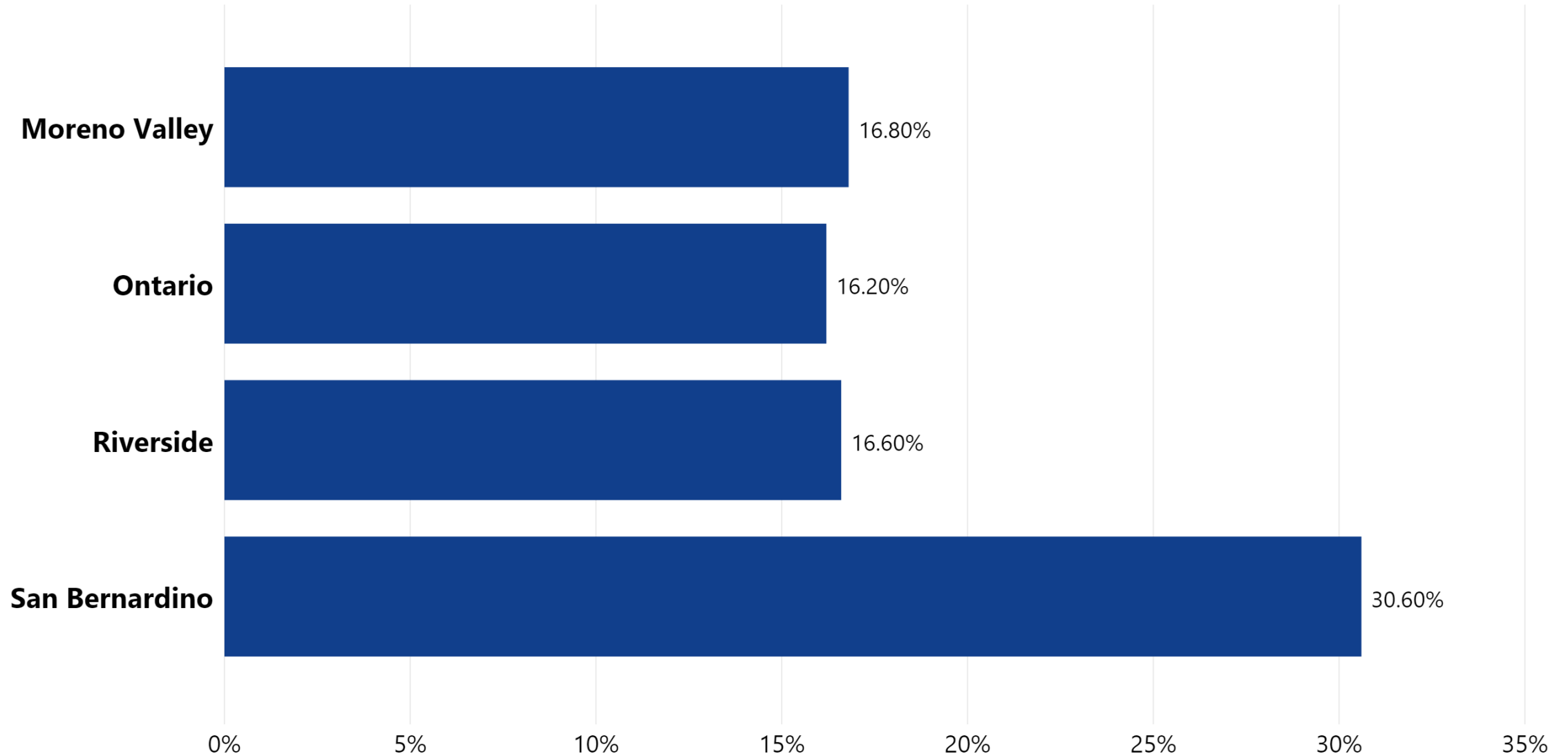


Exhibit 3H: Persons with Bachelor's Degree or Higher

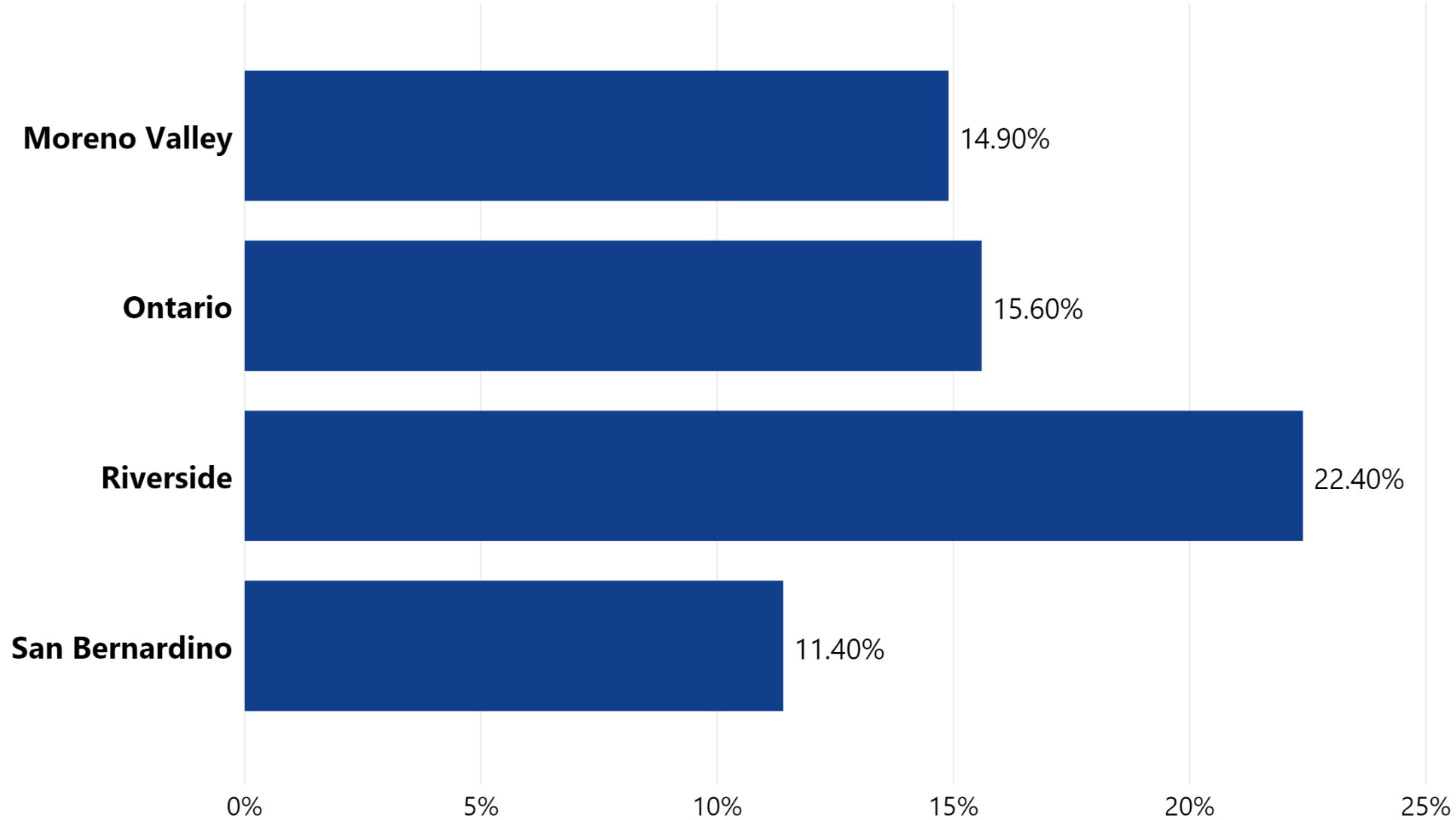


Exhibit 3I: Ethnicity

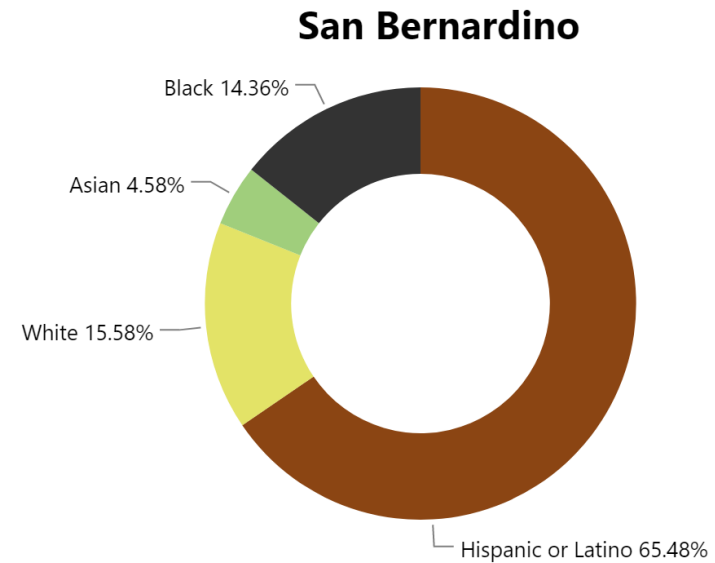
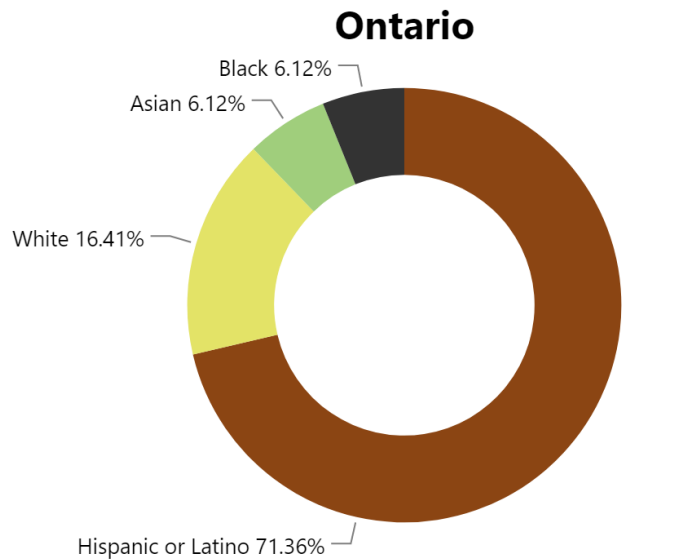
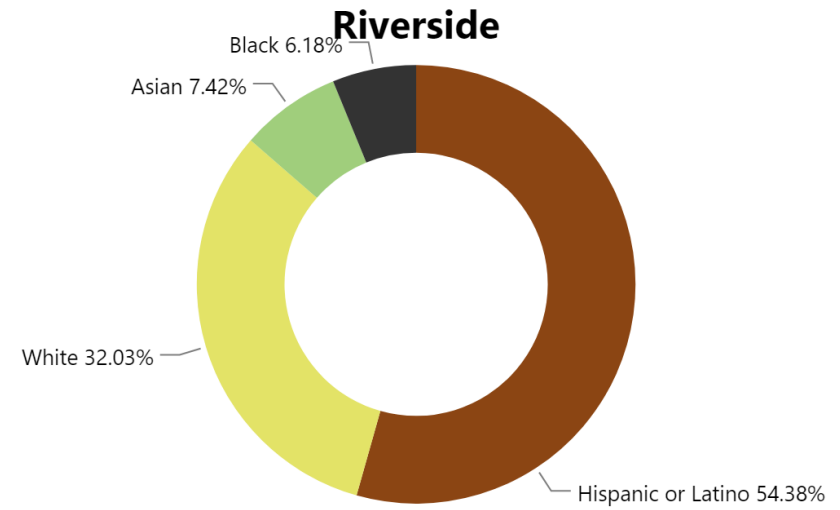
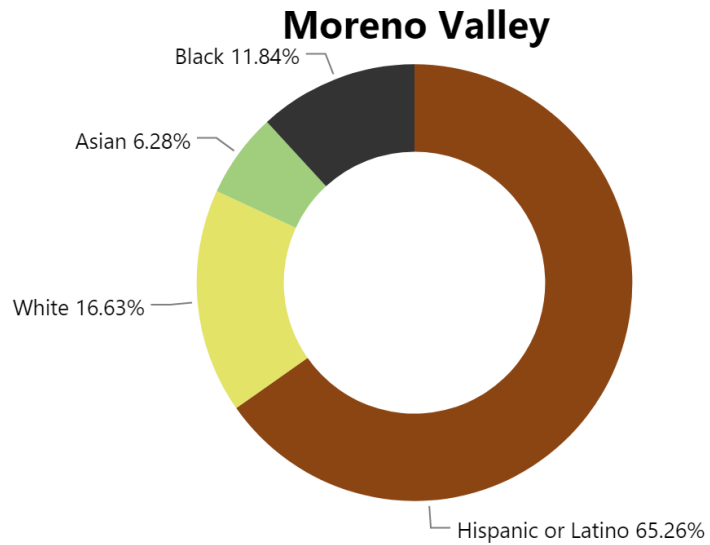


Exhibit 4: Marketing and Start Budget

| Campus | May-20 | Jun-20 | Jul-20 | Aug-20 | Sep-20 | Oct-20 | TOTAL |
|---------------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------------|
| Southern California | \$ 90,000 | \$ 90,000 | \$ 90,000 | \$ 60,000 | \$ 60,000 | \$ 60,000 | \$ 450,000 |

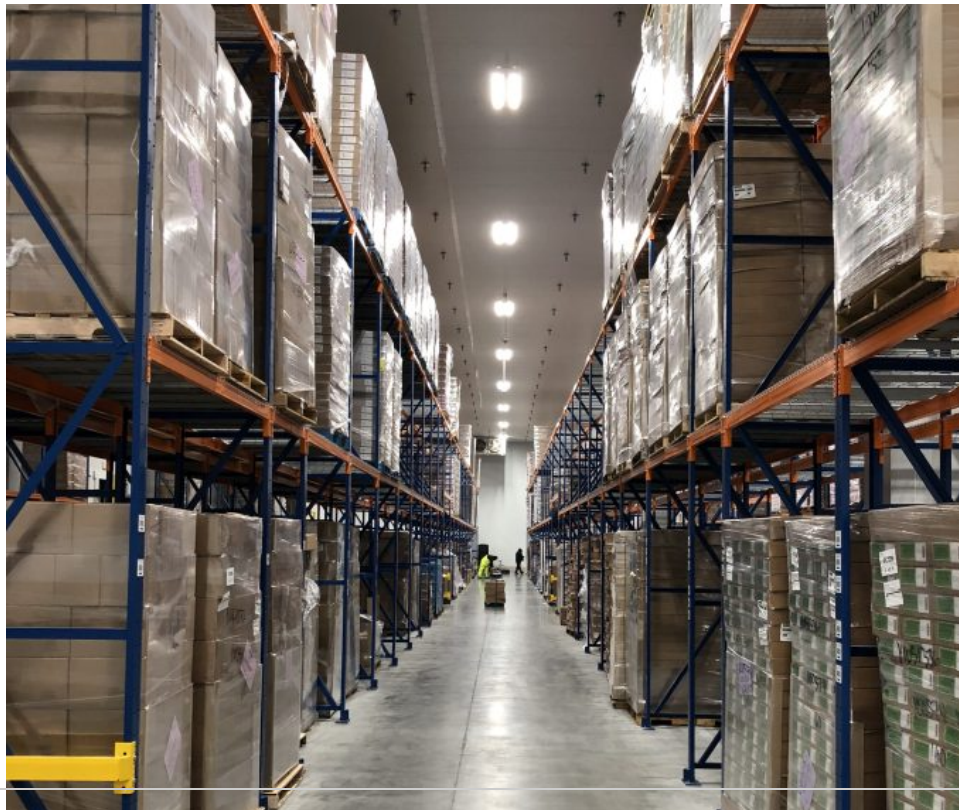
Select first start
date: 8/3/2020

| Campus | Credential | Program | 3-Aug-20 | 7-Sep-20 | 12-Oct-20 | 16-Nov-20 | 21-Dec-20 | 1-Feb-21 | 8-Mar-21 | 12-Apr-21 | 17-May-21 | 21-Jun-21 | 26-Jul-21 | 30-Aug-21 | 4-Oct-21 | 8-Nov-21 | 13-Dec-21 | 24-Jan-22 | 28-Feb-22 | 4-Apr-22 | 9-May-22 | 13-Jun-22 | 18-Jul-22 | TOTAL | |
|---------------------|-------------|-------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--------------|---|
| Southern California | Certificate | Business Administration | 5 | 4 | 3 | 3 | 2 | 6 | 3 | 2 | 3 | 4 | 6 | 3 | 2 | 2 | 2 | 5 | 4 | 2 | 2 | 4 | 6 | 73 | |
| | Certificate | Medical Assisting | 25 | 20 | 15 | 12 | 7 | 22 | 17 | 14 | 14 | 16 | 20 | 14 | 12 | 10 | 8 | 20 | 16 | 13 | 14 | 16 | 23 | 328 | |
| | Certificate | Medical Office Administration | 12 | 8 | 6 | 4 | 3 | 4 | 3 | 2 | 2 | 5 | 4 | 3 | 2 | 1 | 1 | 4 | 3 | 2 | 2 | 4 | 3 | 78 | |
| | AS Degree | Criminal Justice:Corrections | 10 | 8 | 6 | 4 | 4 | - | - | 10 | 8 | 6 | 5 | 5 | 3 | 4 | - | - | 12 | 6 | 5 | 8 | 9 | 113 | |
| | Certificate | HVAC | 12 | 10 | 8 | - | 8 | 7 | 5 | 5 | 4 | 7 | 10 | - | 5 | 4 | 4 | 10 | 6 | 8 | 7 | - | 5 | 125 | |
| | Certificate | Electrical Technology | - | - | - | 20 | 15 | 18 | - | 15 | 11 | 17 | 14 | 12 | 15 | 10 | - | 20 | 15 | 10 | 15 | 18 | 20 | 245 | |
| | AS Degree | Pharmacy Technician | 12 | 10 | 8 | 5 | 3 | 8 | 5 | 4 | 3 | 8 | 6 | 4 | 3 | 3 | 2 | 8 | 6 | 3 | 4 | 6 | 5 | 116 | |
| | AS Degree | Dental Assisting* | | | | | | | | | | | | | | | | | | | | | | | - |
| | Certificate | Veterinary Assisting* | | | | | | | | | | | | | | | | | | | | | | | |
| Riverside | | | 76 | 60 | 46 | 48 | 42 | 65 | 33 | 52 | 45 | 63 | 65 | 41 | 42 | 34 | 17 | 67 | 62 | 44 | 49 | 56 | 71 | 1,078 | |

Exhibit 5: The Press-Enterprise Article

BUSINESS

Inland Empire home to hottest U.S. job market in last 5 years (L.A.-O.C.? No. 26)



Quality Custom Distribution's new Fontana warehouse at 7953 Cherry Ave. means 100-plus new jobs. (Courtesy: QCD)

By **JONATHAN LANSNER** | jlansner@scng.com | Orange County Register

PUBLISHED: October 11, 2018 at 8:15 am | UPDATED: October 11, 2018 at 11:15 am

Let's politely say the Inland Empire's economic progress is often under-appreciated.

For example, did you know Riverside and San Bernardino counties had the nation's fastest job-growth among major metropolitan area during the past five years?

ADVERTISING

When I filled my trusty spreadsheet with a new job study from the Bureau of Labor Statistics, I learned employment in the Inland Empire grew 22 percent in the five years ended in August, best among 51 U.S. regions with populations above 1 million.

The Inland Empire beat out some of the nation's highly touted economic powerhouses: No. 2 job for growth was Orlando's 21.4 percent just ahead of Austin's 20.6 percent. Las Vegas was the No. 4 job builder in 2013-18, up 19 percent, then came Charlotte, up 18.2 percent. Oh, No. 6? Northern California's Silicon Valley, up 18.1 percent.

And bosses in Riverside and San Bernardino counties managed to double the hiring pace of two noteworthy benchmarks. For starters, U.S. jobs overall grew by 9.3 percent in the five-year period. And the perhaps sexier job market in Los Angeles and Orange counties grew by 9.9 percent since '13 — a middling 26th rank in this study.

This hiring spree was quite a reversal for the Inland Empire, a loser of 0.4 percent of its jobs in the five years ended in August 2013. Let's be honest, though: Few bosses were in a hiring mood in that period — during and after the Great Recession.

Employment losses in Riverside and San Bernardino counties in 2008-13 tied the U.S. employment dip for the period. That narrow drop ranked the Inland Empire No. 30 out of the 51 big job markets tracked for 2008-13. But L.A.-O.C. was down 1.8 percent, ranking No. 40. Austin's employment growth, by the way, was best in the 2008-13 period, up 12.2 percent.

Please note, this is not simply a bounce off a harsh bottom. The IE's recent job mojo is strong. In the 12 months ended in August, its employment grew 3.5 percent, No. 6 nationally behind Orlando, Seattle, Vegas, Houston and Phoenix. L.A.-O.C.? No. 37 at 1.2 percent job growth!

So what's the secret sauce in the Inland Empire? A look at another data set, this one from state job watchers, shows that location-location-location certainly helped. Let's ponder what gave Riverside and San Bernardino counties — adding 267,600 new workers in 2013-18 — the nation's leading hire pace.

The I.E.'s much-discussed booming warehousing operations (up 39,600 jobs or 146 percent in five years) supports the ever-changing and growing shopping needs of broader Southern California. Being the region's "affordable" housing option translates to booming populations in Riverside and San Bernardino counties. Thus, construction employment surged 33,000 — or 46 percent — since '13.

Eye-catching growth like that means industries that support daily life also have flourished. Inland Empire bosses in healthcare and social assistance added 41,700 workers, or 24 percent, in five years. The popularity of eating out boosted restaurant employment by 28,700 or 27 percent. And local government jobs — primarily education — increased by 29,500 or 17 percent.

I know the Inland Empire can be the butt of many cultural yuks, no less some serious debate about the quality of its economic boom. But let me note that we could be talking about Pittsburgh, an economically depressed region I lived in from 1979 to 1986.

Why look to Steel City? Well, in the last five years, the federal job shows Pittsburgh as the nation's job-creation laggard among major metro areas as its employment grew by just 2.2 percent. Next was Virginia Beach, Va., at 3.8 percent; then Rochester, N.Y., and New Orleans at 3.9 percent; and Hartford, Conn., at 4.2 percent.

Ponder what stingy hiring means the next time you're stuck in the Inland Empire's infamous traffic. Because census bureau data shows typical commute times in Pittsburgh are eight minutes quicker!

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Jonathan Lansner

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Exhibit 6: EDD Data

Exhibit 6A: Projected Job Openings

| SOC Level* | SOC Code** | Occupational Title | Base Year Employment Estimate 2016*** | Projected Year Employment Estimate 2026 | Numeric Change 2016-2026 [1] | Percentage Change 2016-2026 | Average Annual Job Openings | | | | 2018 First Quarter Wages [5] | |
|------------|------------|--|---------------------------------------|---|------------------------------|-----------------------------|-----------------------------|---------------|----------------|------------------------|------------------------------|---------------|
| | | | | | | | Exits [2] | Transfers [3] | Numeric Change | Total Job Openings [4] | Median Hourly | Median Annual |
| 4 | 29-2052 | Pharmacy Technicians | 3,490 | 4,010 | 520 | 14.9% | 122 | 166 | 52 | 340 | \$17.87 | \$37,166 |
| 4 | 29-2061 | Licensed Practical and Licensed Vocational Nurses | 7,920 | 9,410 | 1,490 | 18.8% | 306 | 301 | 149 | 756 | \$23.47 | \$48,814 |
| 4 | 31-9091 | Dental Assistants | 4,760 | 5,590 | 830 | 17.4% | 264 | 296 | 82 | 642 | \$15.92 | \$33,121 |
| 4 | 31-9092 | Medical Assistants | 8,580 | 10,990 | 2,410 | 28.1% | 430 | 601 | 242 | 1,273 | \$14.72 | \$30,612 |
| 4 | 33-3012 | Correctional Officers and Jailers | 4,270 | 3,940 | -330 | -7.7% | 145 | 185 | -33 | 297 | \$39.37 | \$81,878 |
| 4 | 35-1012 | First-Line Supervisors of Food Preparation and Serving Workers | 8,500 | 10,220 | 1,720 | 20.2% | 419 | 893 | 172 | 1,484 | \$14.31 | \$29,768 |
| 4 | 41-1011 | First-Line Supervisors of Retail Sales Workers | 15,560 | 16,880 | 1,320 | 8.5% | 599 | 1,091 | 132 | 1,622 | \$19.17 | \$39,865 |
| 4 | 47-2111 | Electricians | 6,740 | 8,130 | 1,390 | 20.6% | 259 | 552 | 139 | 950 | \$26.61 | \$55,341 |
| 4 | 49-9021 | Heating, Air Conditioning, and Refrigeration Mechanics and Installers | 3,050 | 3,930 | 880 | 28.9% | 96 | 234 | 88 | 418 | \$21.17 | \$44,054 |
| 4 | 51-4081 | Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic | 700 | 710 | 10 | 1.4% | 26 | 49 | 1 | 76 | \$14.96 | \$31,136 |
| 2 | 43-0000 | Office and Administrative Support Occupations | 217,200 | 237,710 | 20,510 | 9.4% | 11,567 | 13,773 | 2,051 | 27,391 | \$17.24 | \$35,856 |
| 4 | 43-6011 | Executive Secretaries and Executive Administrative Assistants | 4,130 | 3,630 | -500 | -12.1% | 209 | 203 | -50 | 362 | \$27.30 | \$56,779 |
| 4 | 43-4051 | Customer Service Representatives | 16,380 | 18,170 | 1,790 | 10.9% | 883 | 1,296 | 180 | 2,359 | \$17.38 | \$36,153 |
| 4 | 43-3031 | Bookkeeping, Accounting, and Auditing Clerks | 14,690 | 15,470 | 780 | 5.3% | 934 | 724 | 78 | 1,736 | \$19.41 | \$40,370 |
| 4 | 33-9032 | Security Guards | 14,830 | 17,780 | 2,950 | 19.9% | 967 | 1,150 | 295 | 2,412 | \$12.70 | \$26,425 |
| 4 | 21-1093 | Social and Human Service Assistants | 2,440 | 2,810 | 370 | 15.2% | 117 | 188 | 38 | 343 | \$18.50 | \$38,496 |
| 4 | 49-2098 | Security and Fire Alarm Systems Installers | 480 | 620 | 140 | 29.2% | 18 | 41 | 14 | 73 | \$20.11 | \$41,819 |
| 4 | 33-1011 | First-Line Supervisors of Correctional Officers | 620 | 570 | -50 | -8.1% | 18 | 20 | -6 | 32 | \$47.17 | \$98,109 |
| 4 | 49-9071 | Maintenance and Repair Workers, General | 11,310 | 13,080 | 1,770 | 15.6% | 497 | 678 | 177 | 1,352 | \$19.04 | \$39,616 |
| 4 | 49-9098 | Helpers--Installation, Maintenance, and Repair Workers | 1,760 | 2,080 | 320 | 18.2% | 92 | 145 | 32 | 269 | \$13.43 | \$27,927 |
| 4 | 49-9043 | Maintenance Workers, Machinery | 1,070 | 1,330 | 260 | 24.3% | 51 | 69 | 26 | 146 | \$22.59 | \$46,978 |
| 4 | 43-3021 | Billing and Posting Clerks | 4,570 | 5,380 | 810 | 17.7% | 213 | 274 | 82 | 569 | \$17.71 | \$36,839 |
| 4 | 29-2012 | Medical and Clinical Laboratory Technicians | 1,070 | 1,230 | 160 | 15.0% | 35 | 35 | 16 | 86 | \$0.00 | \$0 |
| 4 | 29-2071 | Medical Records and Health Information Technicians | 1,710 | 2,000 | 290 | 17.0% | 54 | 55 | 29 | 138 | \$19.54 | \$40,639 |
| 4 | 43-9061 | Office Clerks, General | 26,360 | 27,600 | 1,240 | 4.7% | 1,583 | 1,543 | 124 | 3,250 | \$16.68 | \$34,700 |
| 4 | 43-6013 | Medical Secretaries | 6,480 | 8,070 | 1,590 | 24.5% | 392 | 381 | 159 | 932 | \$16.62 | \$34,577 |
| 4 | 31-9095 | Pharmacy Aides | 530 | 520 | -10 | -1.9% | 35 | 36 | -1 | 70 | \$12.12 | \$25,201 |

Exhibit 6B: Employers in the Market

| Program | # of Employers |
|---|-----------------------|
| Medical | |
| General Medical and Surgical Hospitals | 136 |
| Medical and Diagnostic Laboratories | 290 |
| Nursing Care Facilities | 135 |
| Office of Physicians | 5622 |
| Offices of Dentists | 2240 |
| Other Hospitals | 16 |
| Outpatient Care Centers | 908 |
| Psychiatric and substance abuse hospitals | 277 |
| Tech | |
| Building Equipment Contractors | 2956 |
| Commercial Repair and Maintenance | 402 |
| Residential Building Construction | 2386 |

Exhibit 7: Census Commute Data

| City | Average travel time to work (minutes) |
|----------------|---------------------------------------|
| Riverside | 30.4 |
| Moreno Valley | 34.3 |
| San Bernardino | 27.8 |

Exhibit 8: Southern California Financial Model

San Joaquin Valley College
 Southern California
 Financial Budget Summary

| | BA | MA | MOA | Start Up CJ | HVAC | ELEC | PT | Admin Expense | Total |
|---|------------|-------------|------------|----------------|-------------|-------------|-------------|---------------|----------------|
| Average Population | | | | | | | | | |
| Revenue | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | | \$ - |
| Direct Expense^A | | | | | | | | | |
| Salaries & Taxes | 2,267 | 4,534 | 2,267 | 7,971 | 7,085 | - | 2,269 | | 26,392 |
| Text & supplies | - | - | - | - | - | - | - | | - |
| Lab Supplies | - | 12,247 | - | - | 68,422 | 77,324 | 26,062 | | 184,056 |
| Cert./Licenses Exams | - | - | - | - | - | - | - | | - |
| Physicals | - | - | - | - | - | - | - | | - |
| Other | - | - | - | - | - | - | - | | - |
| Total Direct | \$ 2,267 | \$ 16,781 | \$ 2,267 | \$ 7,971 | \$ 75,507 | \$ 77,324 | \$ 28,331 | | \$ 210,448 |
| Administrative Expense^B | | | | | | | | | |
| Salaries | | | | | | | | 79,433 | 79,433 |
| Payroll Taxes | | | | | | | | 7,149 | 7,149 |
| Occupancy | | | | | | | | 245,054 | 245,054 |
| Advertising | | | | | | | | 270,000 | 270,000 |
| Bad Debts | | | | | | | | - | - |
| Insurance | | | | | | | | 35,011 | 35,011 |
| Depreciation ^C | | | | | | | | 82,068 | 82,068 |
| Equipment & Supplies | | | | | | | | 47,018 | 47,018 |
| Contract Labor & Service | | | | | | | | 10,285 | 10,285 |
| Software Licenses | | | | | | | | 5,905 | 5,905 |
| Meals & Travel | | | | | | | | 9,093 | 9,093 |
| Employee & Student Relations | | | | | | | | 12,246 | 12,246 |
| Scholarships | | | | | | | | 4,694 | 4,694 |
| Legal | | | | | | | | 877 | 877 |
| Other | | | | | | | | 31,480 | 31,480 |
| Total Administrative | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 840,314 | \$ 840,314 |
| Net Income^D | \$ (2,267) | \$ (16,781) | \$ (2,267) | \$ (7,971) | \$ (75,507) | \$ (77,324) | \$ (28,331) | \$ (840,314) | \$ (1,050,762) |

San Joaquin Valley College
 Southern California
 Financial Budget Summary

| | 1-12 Months | | | | | | | | |
|---|-------------------|---------------------|-------------------|-------------------|-------------------|---------------------|-------------------|-----------------------|---------------------|
| | BA | MA | MOA | CJ | HVAC | ELEC | PT | Admin Expense | Total |
| Average Population | 11 | 64 | 27 | 24 | 29 | 38 | 29 | | |
| Revenue | \$ 239,323 | \$ 1,442,560 | \$ 617,806 | \$ 622,880 | \$ 772,972 | \$ 1,017,529 | \$ 680,072 | | \$ 5,393,143 |
| Direct Expense^A | | | | | | | | | |
| Salaries & Taxes | 27,204 | 92,958 | 47,607 | 98,589 | 75,573 | 76,756 | 45,381 | | 26,392 |
| Text & supplies | 18,097 | 25,446 | 15,596 | 19,177 | 33,621 | 38,819 | 11,243 | | - |
| Lab Supplies | 49 | 17,578 | 281 | 5,007 | 17,344 | 56,604 | 2,862 | | 184,056 |
| Cert./Licenses Exams | 1,327 | 9,035 | 3,383 | 4,289 | 1,330 | 2,498 | 8,581 | | - |
| Physicals | 3 | 11,719 | 3,550 | - | - | - | 1,359 | | - |
| Other | 25,550 | 6,662 | 4,519 | 26,189 | 1,298 | 33,424 | 4,109 | | - |
| Total Direct | \$ 72,230 | \$ 163,398 | \$ 74,936 | \$ 153,250 | \$ 129,167 | \$ 208,100 | \$ 73,535 | | \$ 874,617 |
| Administrative Expense^B | | | | | | | | | |
| Salaries | | | | | | | 661,729 | | 79,433 |
| Payroll Taxes | | | | | | | 59,556 | | 7,149 |
| Occupancy | | | | | | | 980,217 | | 245,054 |
| Advertising | | | | | | | 540,000 | | 270,000 |
| Bad Debts | | | | | | | 44,420 | | - |
| Insurance | | | | | | | 140,045 | | 35,011 |
| Depreciation ^C | | | | | | | 328,273 | | 82,068 |
| Equipment & Supplies | | | | | | | 123,925 | | 47,018 |
| Contract Labor & Service | | | | | | | 41,142 | | 10,285 |
| Software Licenses | | | | | | | 23,619 | | 5,905 |
| Meals & Travel | | | | | | | 36,373 | | 9,093 |
| Employee & Student Relations | | | | | | | 48,986 | | 12,246 |
| Scholarships | | | | | | | 18,775 | | 4,694 |
| Legal | | | | | | | 3,509 | | 877 |
| Other | | | | | | | 125,921 | | 31,480 |
| Total Administrative | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 3,176,488 | \$ 3,176,488 |
| Net Income^D | \$ 167,093 | \$ 1,279,162 | \$ 542,869 | \$ 469,630 | \$ 643,805 | \$ 809,429 | \$ 606,537 | \$ (3,176,488) | \$ 1,342,038 |

San Joaquin Valley College
 Southern California
 Financial Budget Summary

| | 13-24 Months | | | | | | | | |
|---|-------------------|---------------------|-------------------|---------------------|-------------------|---------------------|-------------------|-----------------------|---------------------|
| | BA | MA | MOA | CJ | HVAC | ELEC | PT | Admin Expense | Total |
| Average Population | 12 | 77 | 19 | 39 | 32 | 78 | 27 | | |
| Revenue | \$ 260,160 | \$ 1,755,492 | \$ 441,171 | \$ 1,004,053 | \$ 855,691 | \$ 2,101,983 | \$ 619,979 | | \$ 7,038,529 |
| Direct Expense^A | | | | | | | | | |
| Salaries & Taxes | 27,204 | 108,828 | 54,408 | 128,052 | 85,020 | 106,272 | 54,460 | | 26,392 |
| Text & supplies | 19,571 | 30,868 | 11,098 | 30,870 | 37,109 | 80,107 | 10,218 | | - |
| Lab Supplies | 53 | 21,323 | 200 | 8,059 | 19,143 | 116,808 | 2,601 | | 184,056 |
| Cert./Licenses Exams | 1,435 | 10,960 | 2,407 | 6,904 | 1,468 | 5,154 | 7,799 | | - |
| Physicals | 4 | 14,216 | 2,526 | - | - | - | 1,235 | | - |
| Other | 27,632 | 8,081 | 3,216 | 42,159 | 1,433 | 68,974 | 3,735 | | - |
| Total Direct | \$ 75,899 | \$ 194,277 | \$ 73,855 | \$ 216,044 | \$ 144,174 | \$ 377,314 | \$ 80,047 | | \$ 210,448 |
| Administrative Expense^B | | | | | | | | | |
| Salaries | | | | | | | | 796,877 | 79,433 |
| Payroll Taxes | | | | | | | | 71,719 | 7,149 |
| Occupancy | | | | | | | | 980,217 | 245,054 |
| Advertising | | | | | | | | 480,000 | 270,000 |
| Bad Debts | | | | | | | | 213,216 | - |
| Insurance | | | | | | | | 140,045 | 35,011 |
| Depreciation ^C | | | | | | | | 328,273 | 82,068 |
| Equipment & Supplies | | | | | | | | 123,925 | 47,018 |
| Contract Labor & Service | | | | | | | | 41,142 | 10,285 |
| Software Licenses | | | | | | | | 23,619 | 5,905 |
| Meals & Travel | | | | | | | | 36,373 | 9,093 |
| Employee & Student Relations | | | | | | | | 48,986 | 12,246 |
| Scholarships | | | | | | | | 18,775 | 4,694 |
| Legal | | | | | | | | 3,509 | 877 |
| Other | | | | | | | | 125,921 | 31,480 |
| Total Administrative | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 3,432,596 | \$ 3,432,596 |
| Net Income^D | \$ 184,260 | \$ 1,561,216 | \$ 367,316 | \$ 788,009 | \$ 711,517 | \$ 1,724,668 | \$ 539,932 | \$ (3,432,596) | \$ 2,444,323 |

A: Expenses directly related to the student

B: Administrative expenses that support student learning

C: Depreciation: Capital Expense (5 yr)

D: Campus income before other income/expenses, corporate allocation and taxes

Exhibit 9: Construction Timeline

