

**Competitor Analysis  
San Mateo County Community College District**

Voorhees Group LLC  
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**Introduction**

Degree and certificate programs offered by 27 “two-year or less” post-secondary education institutions operating in a 25-mile radius of the City of San Mateo were tabulated to identify the range of credit degree and certificate programs available in the region. This report identifies those programs that are unique to the San Mateo County Community College District as well as those programs that overlap with other institutions. A caution about program titles is in order. Programs may share similar or identical content but institutions may have chosen to call them different names.

The analysis captures only formal degree and certificate programs registered with the state or available from institutional catalogs. Accordingly, it cannot fully account for all pathways available to students in the District. This report does not capture single courses or clusters of courses that students may take en route to employment and/or transfer.

**Implications for the District**

This report is one tool that can be used to understand postsecondary offerings in a 25-mile radius including which colleges do and do not offer specific degree and certificate programs. This information can help the District understand its market niches and competitive advantages in order to make decisions about its current and future array of programs. This analysis should not be used by itself for decision-making, however. It should be used with other data sources, including labor market forecasts and program trend data prepared for the District’s strategic planning process, as well as instructional expertise, to identify and explore program opportunities.

**Institutions in a 25-Mile Radius**

<b>Table 1 Institutions Awarding 2-Year Degrees or Less Operating within 25 Miles of San Mateo</b>		
<b>Institution</b>	<b>Type</b>	<b>Enrollment</b>
Berkeley City College	2-year, Public	10,953
BioHealth College	< 2-year, Private for-profit	300
<i>Cañada College</i>	2-year, Public	10,682
Carrington College California-San Leandro	2-year, Private for-profit	805
Chabot College	2-year, Public	18,149
City College of San Francisco	2-year, Public	41,548
College of Alameda	2-year, Public	11,283
<i>College of San Mateo</i>	2-year, Public	15,034
De Anza College	2-year, Public	37,626
Everest College-Hayward	< 2-year, Private for-profit	393

<b>Table 1</b> <b>Institutions Awarding 2-Year Degrees or Less</b> <b>Operating within 25 Miles of San Mateo</b>		
<b>Institution</b>	<b>Type</b>	<b>Enrollment</b>
Everest College-San Francisco	< 2-year, Private for-profit	552
Foothill College	2-year, Public	27,693
Gurnick Academy of Medical Arts	2-year, Private for-profit	1,009
Heald College-Hayward	2-year, Private for-profit	2,558
Heald College-San Francisco	2-year, Private for-profit	1,899
Institute for Business and Technology	< 2-year, Private for-profit	211
Laney College	2-year, Public	18,699
Le Cordon Bleu College of Culinary Arts	2-year, Private for-profit	892
Merritt College	2-year, Public	10,276
Miami Ad School-San Francisco	2-year, Private for-profit	175
Mission College	2-year, Public	15,600
National Holistic Institute	< 2-year, Private for-profit	870
NCP College of Nursing, South San Francisco	< 2-year, Private for-profit	125
NCP College of Nursing, Hayward	< 2-year, Private for-profit	134
Ohlone College	2-year, Public	16,414
SAE Institute of Technology, San Francisco	< 2-year, Private for-profit	n/a
<i>Skyline College</i>	2-year, Public	16,133
The English Center	< 2-year, Private not-for-profit	260
Unitek College	2-year, Private for-profit	1,215
Wyotech-Fremont	2-year, Private for-profit	2,075
<b>Total Enrollment</b>		<b>263,563</b>
Note: Enrollments are Unduplicated Headcount for 2012-13 as reported to the U.S. Department of Education		

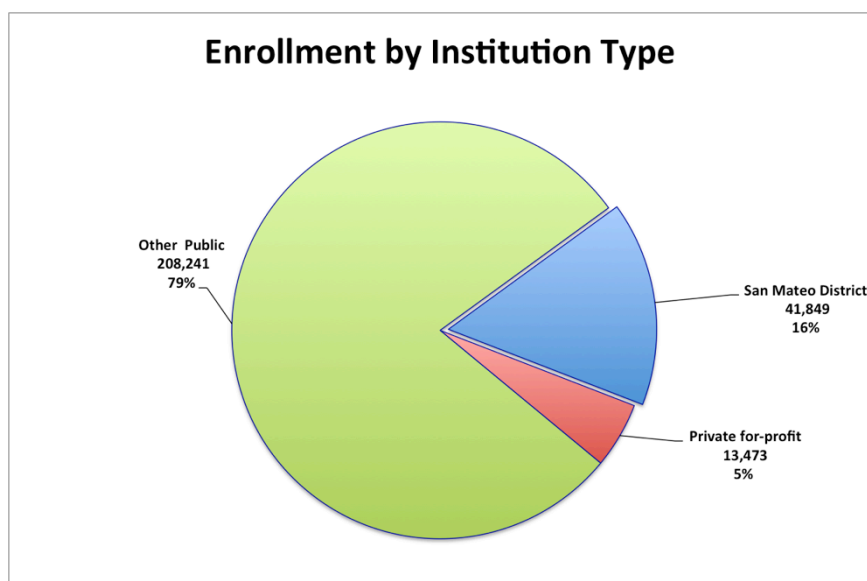
### Enrollment Inside and Outside the San Mateo District

There were 263,563 credit students enrolled in public and private postsecondary institutions offering two-year degrees or less in a 25-mile radius of San Mateo in 2012-13.<sup>1</sup> Enrollment at the District's three colleges (Cañada, College of San Mateo, and Skyline) was 42,136, representing 16% of the total enrollment for institutions offering two-year degrees and less within its 25-mile radius.<sup>2</sup> Two-year public colleges account for 95% of the total enrollment among all 2-year degree and less institutions in the 25-mile radius. Private 2-year for-profit institutions constitute just 5% (Figure 1).

<sup>1</sup> Unduplicated annual headcount enrollment for 2012-13 as reported to the U.S. Department of Education

<sup>2</sup> Source: U.S. Department of Education, National Center for Education Statistics.

Figure 1



### *The Competitive Status of District Programs*

There are 816 total degree and certificate programs offered within the 25-mile radius. Of these, 168 (20.6%) are programs offered by Skyline, San Mateo and Cañada colleges. Table 2 shows the broad array of programs offered at District Colleges and by competitor institutions arranged by broad Taxonomy of Program (TOP) code areas.<sup>3</sup>

<b>Table 2</b> <b>District and Competitor Degree and Certificate Programs</b> <b>By 2-Digit TOP code Areas</b>			
<b>2-Digit TOP Code</b>	<b>Program Area</b>	<b># District Programs</b>	<b># District Programs with No Competition within TOP Code Area</b>
01	Agriculture and Natural Resources	0	0
02	Architecture and Environmental Design	1	0
03	Environmental Sciences and Technologies	1	0
04	Biological Sciences	4	0
05	Business and Management	24	1
06	Media and Communications	11	1
07	Information Technology	7	0
08	Education	3	0

<sup>3</sup> Taxonomy of Programs (TOP) codes are published by the California Community Colleges Chancellors Office and are used statewide to identify the discipline area for a courses or programs.

<b>Table 2</b> <b>District and Competitor Degree and Certificate Programs</b> <b>By 2-Digit TOP code Areas</b>			
<b>2-Digit TOP Code</b>	<b>Program Area</b>	<b># District Programs</b>	<b># District Programs with No Competition within TOP Code Area</b>
09	Engineering and Industrial Technologies	10	2
10	Fine and Applied Arts	13	0
11	Foreign Language	3	0
12	Health	18	1
13	Family and Consumer Sciences	9	2
14	Law	2	0
15	Humanities	7	0
16	Library Science	0	1
17	Mathematics	3	0
18	Military Studies	0	0
19	Physical Sciences	10	1
20	Psychology	3	0
21	Public and Protective Services	6	1
22	Social Sciences	15	1
30	Commercial Services	2	0
49	Interdisciplinary Studies	16	2
<b>Total</b>		<b>168</b>	<b>12</b>

Table 3 shows the 12 District programs with no direct competition. Nine of these are unique programs in career and technical education areas while 3 are in general academic areas. These programs represent a distinctive competitive advantage.

<b>Table 3</b> <b>District Programs with No Competitors</b>		
<b>2-Digit TOP Area</b>	<b>Program</b>	<b>District College</b>
05	Legal Office Technology	Skyline
06	Film Studies	CSM
09	Electro-Mechanical Technology	Skyline
09	Construction Inspection	CSM
12	Surgical Technician	Skyline

<b>Table 3</b> <b>District Programs with No Competitors</b>		
<b>2-Digit TOP Area</b>	<b>Program</b>	<b>District College</b>
13	Fashion Production	Cañada
13	Family and Consumer Studies, General	Skyline
19	Astronomy	CSM
21	Police Academy	CSM
22	Area Studies	Cañada
22	General Studies	Cañada
49	Bilingualism and Biliteracy in English/Spanish	Cañada

Table 4 displays existing programs within the District that compete with one, two, or three programs offered by other institutions in the 25-mile radius. These programs also have competitive advantage but are not exclusive to the District.

<b>Table 4</b> <b>District Degree and Certificate Programs with One to Three Competitors</b>				
<b>2-Digit TOP Area</b>	<b>Program</b>	<b># Of District Programs</b>	<b>College</b>	<b># Of Competitor Programs</b>
02	Architecture and Architectural Technology	1	CSM	3
03	Environmental Technology	1	Cañada	3
05	Logistics and Materials Transportation	1	Skyline	1
05	Medical Office Technology	1	Skyline	2
05	International Business and Trade	1	Skyline	3
06	Radio and Television	1	CSM	2
06	Digital Media	1	CSM	2
07	Computer Software Development	1	CSM	1
08	Physical Education	1	Skyline	2
09	Drafting Technology	1	CSM	1
09	Engineering Technology, General	1	CSM	2
09	Electronics and Electric Technology	1	CSM	3
09	Plumbing, Pipefitting and Steamfitting	1	CSM	3
10	Photography	1	CSM	3
12	Physicians Assistant	1	CSM	1
12	Respiratory Care/Therapy	1	Skyline	2
12	Community Health Care Worker	1	Cañada	2
13	Fashion	1	Skyline	1
13	Fashion Design	1	Cañada	1

<b>Table 4</b> <b>District Degree and Certificate Programs with One to Three Competitors</b>				
<b>2-Digit TOP Area</b>	<b>Program</b>	<b># Of District Programs</b>	<b>College</b>	<b># Of Competitor Programs</b>
13	Interior Design and Merchandising	1	Cañada	3
19	Physical Sciences, General	1	CSM	1
19	Earth Science	1	Cañada	1
21	Alcohol and Controlled Substances	1	CSM	2
21	Human Services	1	Cañada	3
21	Fire Technology	1	CSM	3
49	Humanities and Social Sciences	1	Skyline	1
06	Computer Graphics and Digital Imagery	2	CSM, Cañada	2
08	Fitness Trainer	2	CSM Cañada	3
10	Dance	2	Skyline Cañada	2
12	Administrative Medical Assisting	2	Skyline Cañada	2
12	Health Professions, Transfer Core Curriculum	2	Skyline Cañada	2
13	Fashion Merchandising	2	Skyline Cañada	1
19	Geology	2	CSM Skyline	2
19	Chemistry, General	2	CSM Canada	3
30	Cosmetology and Barbering	2	CSM Skyline	1
05	Retail Store Operations and Management	3	CSM Skyline Cañada	3
06	Website Design and Development	3	CSM Skyline Cañada	3

***Programs Offered Elsewhere in the 25-Mile Radius But Not in the District***

There are 199 degree and certificate programs offered in the 25-mile radius that the District colleges do not offer (Appendix A). There may be a reason why the District has not engaged in these unique programs and only in limited circumstances, for example, when a competitive advantage exists for one or more related programs that already exist in the District, would it be advisable to develop new programs to compete directly with those in the list.

**Programs Offered In California but Not in the 25-Mile Radius**

There are 82 degree and certificate programs that are offered elsewhere in California but not within the 25-mile radius of SMCCCD (Table 5). If decisions are made to develop these programs, for example based on labor market demand, industry partnerships, and internal capability, they may represent new niches for the District and its three colleges.

<b>Table 5</b> <b>Programs Not Offered by Any Institution in a 25-Mile Radius of San Mateo</b>			
<b>2-Digit TOP Code</b>	<b>Degree or Certificate Program</b>		<b>2-Digit TOP Code</b> <b>Degree or Certificate Program</b>
01	Agriculture Technology and Sciences, Gen		09 Aeronautical and Aviation Technology
01	Animal Science		09 Aircraft Fabrication
01	Dairy Science		09 Construction Crafts Technology
01	Equine Science		09 Drywall and Insulation
01	Plant Science		09 Architectural Drafting
01	Agricultural Pest Control Adviser and Operator (Licensed)		09 Plastics and Composites
01	Viticulture, Enology, and Wine Business		09 Industrial and Occupational Safety and Health
01	Turf grass Technology		09 Industrial Quality Control
01	Agriculture Business, Sales and Service		09 Surveying
01	Food Processing and Related Technologies		09 Water and Wastewater Technology
01	Forestry		10 Commercial Dance
01	Parks and Outdoor Recreation		10 Jewelry
01	Agricultural Power Equipment Technology		11 Foreign Languages, General
01	Other Agriculture and Natural Resources		11 German
04	Botany, General		11 Arabic
04	Microbiology		12 Health Occupations, General
04	Zoology, General		12 Hospital and Health Care Administration
04	Anatomy and Physiology		12 Speech/Language Pathology and Audiology
05	Escrow		12 Certified Nurse Assistant
05	Insurance		12 Emergency Medical Services
05	Court Reporting		12 Mortuary Science
05	Office Management		13 Preschool Age Child
06	Sound Arts		13 Family Studies
06	Radio		14 Law, General
06	Broadcast Journalism		15 Religious Studies
06	Public Relations		21 Public Works
06	Film History and Criticism		21 Probation and Parole
06	Electronic Game Design		21 Forensics, Evidence, and Investigation

Table 5				
Programs Not Offered by Any Institution in a 25-Mile Radius of San Mateo				
2-Digit TOP Code	Degree or Certificate Program		2-Digit TOP Code	Degree or Certificate Program
06	Desktop Publishing		21	Wildland Fire Technology
07	Information Technology, General		21	Fire Academy
07	Computer Systems Analysis		22	American Studies
07	Other Information Technology		22	Archaeology
08	Educational Aide (Teacher Assistant), Bilingual		22	Student Government
08	Physical Fitness and Body Movement		30	Aviation and Airport Management
08	Health Education		30	Piloting
08	Industrial Arts (Transfer)		30	Flight Attendant
08	Educational Technology		49	High School Diploma Program/GED
09	Electrical Systems and Power Transmission		49	English as a Second Language—Survival Level
09	Biomedical Instrumentation		49	Vocational ESL
09	Heavy Equipment Maintenance		49	Other Interdisciplinary Studies
09	Heavy Equipment Operation		99	Academic English as a Second Language

### **Methodology**

The comparison list of institutions was generated from the U.S. Department of Education's Integrated Postsecondary Data System (IPEDS) database. IPEDS data were filtered to include both public and private institutions within a 25-mile radius of San Mateo that offer 2-year degrees or less. The California Community Colleges Chancellor's Office Curriculum Inventory was employed to determine the array of programs offered by public institutions.<sup>4</sup> The most recent catalogs published online by private for-profit and non-profit institutions were analyzed and to include their programs in this analysis.

Although assigned the same TOP Code, program labels vary in public colleges. To account for these semantical differences we use standardized TOP program names as defined by the California Employment Development Department.<sup>5</sup> In turn, this information was entered in a master database of community college programs developed by Voorhees Group LLC and organized by the Taxonomy of Programs (TOP) codes. This database is housed in the District Office for further analyses. The analysis above makes use of full 6-digit TOP codes to determine whether given programs had either a direct or rough correspondence to other programs. When that could not be determined, a new program category in the master database was created.

<sup>4</sup> See <http://curriculum.cccco.edu/>

<sup>5</sup> See <http://www.labormarketinfo.edd.ca.gov/commcolleges/>



## Appendix A

Degree and Certificate Programs Offered at Other Institutions in a 25-Mile Radius But Not In the San Mateo District						
2-Digit TOP Code	Degree or Certificate Program	# Programs at Competing Institutions		2-Digit TOP Code	Degree or Certificate Program	# Programs at Competing Institutions
01	Horticulture	1		09	Environmental Control Technology	4
01	Natural Resources	1		09	Manufacturing and Industrial Technology	4
01	Veterinary Technician (Licensed)	2		10	Commercial Art	1
01	Landscape Design and Maintenance	2		10	Sculpture	2
01	Floriculture /Floristry	2		10	Commercial Music	2
01	Nursery Technology	2		10	Technical Theater	2
03	Environmental Science	2		10	Painting and Drawing	3
03	Environmental Studies	3		10	Ceramics	3
05	Tax Studies	1		10	Applied Photography	3
05	Advertising	1		11	Chinese	1
05	Sales and Salesmanship	1		11	Japanese	2
05	Banking and Finance	2		11	French	3
06	Media and Communications, General	2		12	Clinical Medical Assisting	1
06	Television (including combined TV/film/video)	2		12	Diagnostic Medical Sonography	1
06	Technical Communication	2		12	Other Health Occupations	1
06	Film Production	2		12	Physical Therapist Assistant	2
06	Animation	4		12	Athletic Training and Sports Medicine	2
07	Database Design and Administration	2		12	Psychiatric Technician	2
07	World Wide Web Administration	2		12	Dental Hygienist	2
07	Software Applications	3		12	Paramedic	2
07	Computer Programming	5		12	Medical Laboratory Technology	3
07	Computer Support	5		12	Health Information Technology	4
08	Coaching	1		12	Licensed Vocational Nursing	6
08	Aquatics and Lifesaving	1		12	Pharmacy Technology	9
08	Recreation	1		13	The School Age Child	1
08	Sign Language Interpreting	1		13	Infants and Toddlers	1
08	Educational Aide (Teacher Assistant)	2		13	Dietetic Services and Management	1

08	Sign Language	2		13	Dietetic Technology	1
09	Industrial Electronics	1		13	Lodging Management	1
09	Telecommunications Technology	1		13	Gerontology	1
09	Industrial Systems Technology and Maintenance	1		13	Nutrition, Foods, and Culinary Arts	2
09	Diesel Technology	1		13	Culinary Arts	2
09	Motorcycle, Outboard and Small Engine Repair	1		13	Hospitality	2
09	Mill and Cabinet Work	1		13	Restaurant and Food Services and Management	2
09	Painting, Decorating, and Flooring	1		13	Child Development Administration and Management	3
09	Technical Illustration	1		13	Children with Special Needs	4
09	Laboratory Science Technology	1		15	Language Arts	1
09	Other Engineering and Related Industrial Technologies	1		15	Creative Writing	1
09	Energy Systems Technology	2		16	Library Technician (Aide)	1
09	Alternative Fuels and Advanced Transportation Technology	2		20	Behavioral Science	1
09	Automotive Collision Repair	2		21	Other Public and Protective Services	1
09	Aviation Airframe Mechanics	2		21	Disability Services	2
09	Aviation Powerplant Mechanics	2		21	Industrial and Transportation Security	2
09	Carpentry	2		21	Corrections	4
09	Roofing	2		22	Geographic Information Systems	1
09	Mechanical Drafting	2		22	Women's Studies	2
09	Sheet Metal and Structural Metal	2		30	Travel Services and Tourism	2
09	Welding Technology	2		49	Job Seeking/Changing Skills	1
09	Machining and Machine Tools	3		49	English as a Second Language—General	1
09	Civil and Construction Management Technology	3		<b>Total Programs</b>		<b>199</b>