



March 2011

Regional Needs Analysis Report

Executive Summary

The Higher Education Coordinating Board (HECB) is required to develop a comprehensive and ongoing needs assessment process to analyze demand for additional degrees and programs [RCW 28B.76.230 (1)].

This report fulfills a portion of that mandate by focusing on employer demand on the regional level, but also includes additional information on forecast student demand and statewide employer demand.

The HECB also is required to determine whether certain major lines of study or types of degrees, including applied degrees or research-oriented degrees, shall be assigned uniquely to some institutions or institutional sectors in order to create centers of excellence that focus resources and expertise [RCW 28B.76.230 (4)]. This determination will rely on the needs assessment, the institutional program review process, and the fit between academic programs and institutional role and mission.

This report divides the state into eight higher education regions and looks at the enrollment and degree production capacity in each. It also identifies high employer demand occupations based on forecast new and replacement job openings between 2010 and 2020.

No attempt is made to match regional supply by field of study with forecast demand by occupation to identify regional gaps, as supply is assessed by the HECB on a statewide basis and not at the sub-state region level. This is because workers and students frequently travel long distances for jobs and education opportunities. Institutions are in the best position to identify regional supply gaps, in consultation with local employers and agencies.

Some of the findings of this report are:

- **College participation rates vary widely across the state.** Higher college participation rates are found in counties where institutions (especially institutions with resident students) are located.

- **The distribution of 2-year and 4-year capacity in each region varies widely.** One region has majority 4-year capacity, and some regions have virtually no 4-year capacity.
- **Higher education capacity is highly concentrated in King County, and to a lesser degree in Spokane and Pullman.** This is especially true for graduate-level capacity. Demographic, policy, and economic factors described in this report are all underscoring the need to expand higher education capacity outside of these regions.
- **Registered nurses, teachers, and business, management, and accounting occupations all appear near the top of each region’s list of high-wage, high-demand occupations requiring postsecondary education.**
- **Institutions should focus on occupations that offer both high wages and either high job growth rates or total job openings when identifying programs for expansion.** A focus on wage levels will maximize the local economic development impact of education investments.

A new feature of this report is that information is presented about the wage levels for each occupation. Median wages for each occupation are compared to the self-sufficiency wage levels for three different family types in each region to guide institutions toward focusing on occupations that promote economic self-sufficiency.