Overview:
SPBAC last undertook an environmental scan in early 2007. Clearly, the major change in our environment since that time has been the global economic crisis. Arizona might be said to be at the epicenter of this crisis insofar as it began in the housing industry, on which Arizona’s economy is disproportionately dependent, and insofar as Arizona’s economy and state budget are among the most severely impacted. The range of knowable and, at present, unknowable impacts of this economic crisis are very broad. Most immediately, the crisis impacts the ability and willingness of the state to fund the universities in Arizona. It has and will impact the demography of the state, reducing the rate of population growth and potentially the composition of the population in terms of ethnicity and age. It impacts the choices and behavior of students and their families: a variety of studies already suggest that students are more likely to choose their in-state public university, but also that more students may choose to pursue careers in public service (reversing a trend towards business and finance) and may choose different majors on the way to those careers. In the longer term, the current crisis could lead to significant shifts in public policy and ideology at national and/or global levels as occurred in the context of previous major crises such as the Great Depression, which enabled the New Deal, or the recession and oil crisis of the early 1970s, which led to the emergence of significant trends towards: financial globalization; the use of off-shore, outsourced and part-time temporary labor by corporations; so-called “free-market fundamentalism” and the concomitant privatization of government services; reductions in government regulation and social welfare spending; renewed ideological emphases on personal responsibility and individual entrepreneurialism. While it is impossible at this point to predict what if any major changes in corporate practices and strategies, government policies and dominant ideologies might emerge from the current moment, given the commitment of the Obama administration to policy changes related to health care, energy and education, all of which are key elements of our own environment, it is crucial to keep in mind that the future may not be fully predictable based on the trends of the last couple of decades.

Issues and Implications:
1) In the near-term, the state (government, industry and individuals) and, therefore, the university will continue to face severe financial difficulties. Meanwhile, student needs for academic and non-academic services (from advising and tutoring to psychological counseling) will remain high and/or continue to grow, creating their own financial pressures on the university. And the trend towards increased demands for “accountability” and “affordability” do not appear to be abating. Therefore, we must continue to prioritize cost reduction in areas outside

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1 This update was produced by a SPBAC subcommittee including Miranda Joseph, Chestalene Pintozzi, Bill Shiba and Mary Raphael. We are grateful to several campus experts who made substantial contributions to this document: Bill Christ on Healthcare; Diana Liverman on Natural Resources and the Environment; Bruce Cameron and Stuart Glogoff on Technology.

2 The 2007 environmental scan is incorporated into the UA Five-Year Strategic Plan FY 2009-2013, available at: http://spbac.web.arizona.edu/Archives
the academic core while improving our ability to communicate the value of those core academic activities to diverse constituencies.

2) We will be challenged in meeting demands for increased enrollment and degree production by reduced rates of population growth and the poor “flow” of Arizona youth through the educational pipeline. And Arizona P-14 students will likely continue to be poorly prepared for university access and success. To achieve our goals, we must participate in addressing the barriers to educational achievement that persist in Arizona; therefore, P-14 efforts should remain a high priority.

3) The persistence of globalization suggests that we must continue to improve our efforts to educate students to function across the borders of nations, languages and cultures. At the same time, the ongoing shift in the job market towards service industries and the current economic uncertainty suggest that we should provide students with the kind of education that will allow them to be flexible and responsive to changing career opportunities and that we should be responsive to the educational needs of non-traditional students.

4) The likelihood that healthcare will be a significant area of employment opportunity and research funding suggests that we should continue to prioritize our health-related educational and research programs.

5) Rapid technological change will provide great opportunities with regard to both research and instruction but given the pace and unpredictability of those changes, taking up those opportunities will continue to be a challenge to our agility and resources.

6) Current pressures for increased educational productivity and affordability appear to be leading to significant changes in the roles of various kinds of institutions within the higher education industry, such as a substantially increased role for community colleges. We must continue to lay a flexible groundwork for participating in a changing institutional environment.

7) The details and extent of restructuring of the health care industry are as yet unknown. Changes could impact us in a variety of ways including changing the costs of employee benefits and the flows of funds through the hospitals and health care practices with which our health-related educational programs are intertwined.

8) Climate change is predicted to make Arizona significantly hotter and drier, with potentially wide-ranging impacts on the economy and political dynamics as well as the natural environment. In addition to facing likely increases in costs of water and energy, the UA could be impacted in as yet unknown ways by changes in the politics and economy of the state. However, the UA is well positioned to make significant contributions to environmental knowledge and policy and thus to play a role in shaping the future to which we are subjected. Development of our environment-related research across fields and disciplines should continue to be a strategic priority.
A) **Economic Projections**

Global: The current economic crisis is a global phenomenon, demonstrating the extent of the “globalization” of financial markets. And certainly, while the term “globalization” seems to have fallen out of fashion, the flows of capital, people, information, and material goods across the globe continue. However, ongoing trends and the current crisis may produce shifts in the balances of economic and political power that would have implications for us. For instance, the increasing economic and political power of China, India, Brazil and Russia enable them to provide educational and employment opportunities for their citizens who might previously have sought those opportunities in the US. Meanwhile, more local and/or bi-lateral economic and political relationships, such as the US-Mexico relationship and the battle of the Mexican government with the drug cartels are significant elements of our environment, affecting the economy of Arizona, its population size and composition, and the quality of life (freedom of movement across the border, militarization of border communities, violence/fear of violence, etc).

National: There appears to be some evidence that the US economy may be bottoming out, with slight increases in consumer spending and consumer sentiment. Low mortgage rates are beginning to have an effect, increasing home sales and refinancing of existing mortgages. However, economists note that unemployment is a lagging indicator and job losses generally continue for some months after other indicators improve.

Arizona: State revenue collections continue to decline. Arizona’s real-estate driven economy has been particularly hard-hit. The state has the second largest percentage budget shortfall among the 50 states. It is reported that an eight-month to one-year inventory of housing is on the market, commercial real estate sales are down, and job losses are continuing particularly in the construction sector. In addition, job creation has plummeted. Arizona ranked 47th in job growth in 2008, according to the U.S. Dept. of Labor.

Forecasts for recovery and future growth in Arizona vary significantly:

- The JLBC weighted forecast (based on UA high, UA low, JLBC, and Finance Advisory Committee estimates) projects continued drops in sales tax, individual income tax and corporate income tax collections through 2009, stabilization in 2010 and growth in 2011 and 2012.
- The Western Blue Chip Economic Forecast (consensus of 16 groups) from the ASU W.P. Carey School of Business predicts very small 2009 increases in personal income (2.1%) and population growth (1.7%) and decreases in retail sales (-1.3%), wage and salary employees (1.2%), and single-family housing permits (-13.1%). For 2010, however, the consensus forecast is for increases in all 5 areas including a 3.4% increase in personal income and a 17.2% increase in single-family housing permits.
- The UA Economic & Business Research Center “Arizona’s Economy” forecast for personal income shows recovery beginning in 2010 and increasing to an 8.5% annual rate by 2013 with wage per employee increases growing from 2.5% in
2009 to 4% by 2013. The projection is for retail sales to begin increasing in 2010 (2.1%) and continue through 2013 (7.8%). Population growth, which peaked at 3.6% in 2005 and 2006, is expected to remain low increasing from 1.2% in 2009 to 2.4% in 2013. Residential building permits are projected to begin increasing significantly in 2011 and increasing to 66,257 in 2013 – an increase of almost 20,000 over the 48,434 issued in 2007.

Overall, Arizona’s economic recovery will probably lag behind the rest of the nation as it usually does, perhaps reaching full recovery by 2012 or 2013. However, because of the state’s political environment there is no guarantee that funding for higher education will be increased as the state’s economy recovers.

Implications
- The persistence of “globalization,” and increased economic and political power of nations outside of North America and Europe suggests that we must continue to improve our efforts to educate our students to function across the borders of nations, languages, and cultures. At the same time, the ongoing relative strengthening of economies of the so-called “BRIC” countries (Brazil, Russia, India and China) may portend decrease in the numbers of international students seeking to study (and/or remain) in US as opportunities expand at home.
- The dire economic situation faced by the nation and the state of Arizona will obviously squeeze the university financially, reducing state funding and limiting the ability and willingness of students and families to pay for higher education, even as the job market encourages people to seek more education.

B) Demographic Projections and Social Factors

OVERALL STATE POPULATION: Our strategic plan (and the ABOR 2020 plan) is based on projections for very dramatic population growth for the state of Arizona and a concomitant increase in “flow” through the educational system. Recent trends would appear to support this projection in that Arizona’s population grew by 23.5% (over 1,208,000 individuals) from April 1, 2000 to July 1, 2007. (Over the same period the population of the United States grew by 7.2% and The University of Arizona’s student enrollment grew by 7.9% (if FY2008 data are used, the UA percentage change from 2000 is 10.3).) However, as noted above, the most recently revised projections are much lower, with the UA Economic and Business Research Center estimating that AZ population growth peaked at 3.6% in 2005 and 2006, has dropped to 1.2% in 2009 and is only expected to increase to 2.4% in 2013. Particularly notable is that estimates of net migration have been revised down from 150K to 25K for 2009.

HISPANIC POPULATION: Our strategic plan assumed a very substantial increase in the proportion of Hispanics in the population and flowing through the education system. (Nationally, Pew is estimating that 50% of population growth will be Hispanic.) However, the collapse of the housing/construction industry in AZ, which has a disproportionate impact on Hispanics, and the crackdown on undocumented immigrants suggests that prior Hispanic population projections may be too large.
FLOW: A number of factors converge to impede the flow of Arizona youth to the universities including a high proportion of the population with low incomes and the relatively low levels of educational attainment among the parents of potential college students. These factors are exacerbated for traditionally underrepresented minorities. However, the leveling off of enrollment demand that might be expected from the leveling of the number of high school graduates (peaked in 2008) may be postponed due to the increased demand usually experienced during a recessionary period.

**Implications**
- The data presented suggest that it will be a challenge for the UA to increase enrollment of properly prepared undergraduates to the extent suggested in ABOR’s 2020 plan. Our strategic plan suggests that we will take some responsibility for ensuring that P-14 students are prepared for the UA. Given the barriers to educational achievement that persist in Arizona, if we hope to achieve our enrollment growth targets, P-14 efforts should remain a high priority.

**C) Employment Projections**

**NATIONAL:** The national outlook is for the shift from goods-producing to service-providing employment to continue. According to the US Bureau of Labor Statistics, for the period 2006-2016, the largest employment sector, education and health services, is projected to grow by 18.8% (adding 5.5 million jobs). The professional and business services sector is projected to grow by 23.3% (adding 4.1 million jobs); within that sector, employment in professional, scientific, and technical services will grow by 28.8 percent and add 2.1 million new jobs by 2016. The occupations projected to grow the fastest are: professional and related occupations (16.7% increase); service occupations (16.7%); management, and business and financial occupations (10.4%). (These trends appear to be unchanged by the current economic crisis: a March 10 AP story reports that pharmacists, engineers and nurses are still in demand and that even some banks are hiring. The story states that, broadly, jobs are being added in education, health care and the federal government.)

Nation-wide, occupations requiring advanced degrees projected to grow most rapidly and to have the largest numerical growth between now and 2016 are overwhelmingly in health related fields, (including mental health). Growing occupations requiring Bachelor’s degrees are in fields related to business and financial management, education, and computer/network/information systems.

**ARIZONA:** According to the Arizona Department of Commerce, (Arizona Workforce Employment Report, April 16, 2009), Arizona is largely aligned with the national trends: Professional and Business Services and Educational and Health Services now occupy a much larger share of nonfarm payroll employment compared with 1990. In the context of the rising unemployment rate this year, trends can be assessed based on relatively lower rates of job loss: Educational and Health Services is the only sector that has not sustained an actual decline in employment over the last year; more generally, goods-producing
employment is down over 15% over the last year while service-providing employment is down less than 5%. The Arizona Profile predicts the fastest growing industries include: general merchandise stores, other financial investment activities, and social advocacy organizations while the highest wage occupations in Arizona are predicted to be: anesthesiologists, surgeons, obstetricians & gynecologists, general internists, orthodontists, airline pilots/co-pilots & flight engineers, and engineers. Data from Marshall Vest also shows that there has been a steady increase in government employment over the last several decades that is expected to continue, although current cuts in state funding may put a temporary crimp in that growth.

A sample of currently available jobs in Arizona and Tucson (Monster.com: Arizona Jobs Listed 4/13/09) includes:

- Sales/Retail/Business Development -- 539
- Medical/Health -- 513
- IT/Software Development -- 494
- Accounting & Finance -- 307
- Engineering -- 252
- Customer Support -- 149
- Administrative/Clerical -- 101

**Implications**

Given current employment trends, our commitment to enhancing our ability to train health care providers across a wide range of fields appears a wise strategy. At the same time, it will remain important to provide a solid core educational experience for students to prepare them for a future in which they may change careers several times. And as the economy rebounds over the next several years, the employment picture for Arizona may well change. Therefore, the ongoing “transformation” of our colleges and programs should be used to create the flexibility needed to address changing educational needs of the state in a timely manner.

**D) Student Characteristics**

So-called “Millennial” students are different from previous cohorts in a number of ways. While we noted some of these characteristics in our strategic plan, they are worth reiterating here as some are intensified by the economic crisis (such as the interest of students in public service), while some will put particular pressure on the university in the current economic context. For instance:

- Students require more remedial help in order to catch up to academic college level expectations. The National Survey of Student Engagement (NSSE) found that under-prepared students were significantly less engaged than highly prepared students. Similarly, NSSE found that under-prepared students were over-represented by first-generation students, which intimates that universities should provide more direction and support to this population.

- Use of campus psychological services demonstrates that specific behaviors such as eating disorders, drug abuse, alcohol abuse, and suicide attempts have all increased.
Increased use of technology (cell phones, instant messaging, and social networking sites) results in a society that enjoys enhanced communication opportunities with members of the nuclear family and “inner circle” friends, but diminished interactions beyond those circles and decreased in-person social interaction skills and networking opportunities. On the other hand, online instruction and the deployment of online communities in an instructional context are easier for this generation to navigate.

Meanwhile, changes in values such as the following may produce shifts in student demand for specific academic content and extra-curricular activities:

- According to NSSE, more than 40% of first year students and 60% of seniors report having performed community service or volunteer work.
- Students are more aware of religious options beyond Christianity and no longer see it as the American “default” faith. However, almost three-quarters of all Americans say their faith is becoming increasingly important to them as a moral guide.

The economic crisis has some specific implications for our students and their families: for instance, financial hardships will impact how families finance their education and changes will be seen in where students attend college (such changes may be immediate, with greater transferring among institutions); they may be less willing to pay for “extras.”

**Implications**

The changing character of our student body is one of the aspects of our environment with the most substantial and wide-ranging implications for the university. The trends identified here suggest that, among other things:

- despite financial constraints, we must continue to provide increasing quantity and quality of academic and non-academic student services;
- we may need to change what we teach and how we teach it in response to changing student interests, career goals, and modes of literacy/communication;
- we may need to revise expectations about the dynamics of recruitment and retention (resident vs non-resident demand; financial aid demand; the dynamics of exiting and entering transfers).

**E) Technology**

It is difficult to predict what forms technology will take in the future although we do know it develops at an exponential rate, with implications for instruction, research and the operation of the institution.

The Horizon Report - 2009, from the New Media Consortium (http://wp.nmc.org/horizon2009/) offers the following:

The technologies featured in the 2009 Horizon Report are placed along three adoption horizons that represent… likely timeframes for their entrance into
mainstream use for teaching, learning, research, or creative applications. The first adoption horizon assumes the likelihood of entry into the mainstream of institutions within the next year; the second, within two to three years; and the third, within four to five years.

In the first adoption horizon we find mobiles and cloud computing, both of which are already well established on many campuses — and still more organizations have plans in place to make use of these technologies in the coming months. Institutions at the leading edge of technology adoption are also already applying the two clusters of technologies we have placed on the mid-term horizon, geo-everything and the personal web. All four topics on the first two horizons are already in common use in other sectors, including entertainment, commerce, and the world of work. The two technologies placed on the far-term horizon, semantic-aware applications and smart objects, are not yet commonly found in an educational context, although research is being conducted in both areas and the rate of development seems to indicate that these topics are well worth watching.

Implications
The rapid and dramatic technological advances create great opportunities for the UA (in some cases, such as cloud computing, to improve access to applications and data at reduced costs) but also great pressure on the University's ability to implement new technology as it appears. This may be particularly true in the instructional context, where students, whose lives take place in/on their mobile devices, are still required to "power down" when they enter most university courses.

F) Higher Education Industry
The higher education industry has undergone a variety of significant transformations over the last few decades. While many and various reports from government and foundations sound the alarm over the declining competitiveness of US higher education globally, public financial support for higher education has seen a dramatic decline. Financial pressures and management trends have converged to shift financial structures (towards greater reliance on tuition, industry-sponsorship of research, for-profit ventures related to student life, etc); political pressures have driven increased emphasis on learning assessment and other performance measures; and economic and social trends have shifted the emphasis of knowledge production and instruction away from liberal arts and towards applied science and technology, business, health professions and other fields with greater “market proximity.” The composition of the workforce of universities has also shifted, with increasing use of non-tenure track instructional labor, increasing numbers of non-faculty professionals supporting tech transfer, various reporting and compliance requirements etc.

Looking forward, while the emphasis of the Obama administration on education and research is welcome and may provide some resources (through increased Pell Grants, increased funding for NIH and other research funders, etc), the current economic downturn, leading to further cuts in state funding, suggests that there will be no relief
from financial pressures. Meanwhile, there is no sign that the political emphasis on accounting, accountability and management by measurement will abate. (The new efforts funded by the Lumina Foundation to bring the so-called Bologna Process to the US suggest instead yet another ramping up of efforts at standardized measurement of higher education.) And for universities, Obama’s emphasis on education may be less encouraging than it would initially seem, actually leading to a declining role for research universities relative to community colleges (his statement that everyone should have at least one-year of postsecondary education and his appointment of a community college leader as the Dept of Ed #2 support this view). Meanwhile, the reallocation of the cost of higher ed from states to students has led to calls and proposals from foundations and governing boards for more use of low-cost educational options such as 2+2 programs or even allowing and encouraging community colleges to offer Bachelors degrees (per NYTimes, 5/3/09, 17 states have allowed community colleges to offer Bachelors).

**Implications**
The ever-increasing emphasis on efficiency, productivity, affordability, accountability combined with ongoing financial constraints will likely continue to keep the public research university in a vise, struggling to justify its cost structure as well as the substance of much of its research activity. That is, improving our ability to communicate our value should be seen as a strategic priority. Meanwhile, we must lay a flexible groundwork for participation and collaboration in a changing institutional environment.

**G) Health Care**
The health care system in the U.S. is currently the object of substantial debate and potential policy change. Such changes aim to address a variety of issues that emerge from extraordinary advances in medical science, the high cost of health care and the lack of universal coverage in the US.

Dramatic technological and scientific advances have and will continue to enable the rapid development of new evidence-based treatments and so-called “personalized healthcare.” The U.S. Dept. of Health and Human Services has shown great interest in personalized healthcare and recently published the report “Personalized Health Care Pioneers, Partnerships, Progress.” Academic medical centers are expected to play a substantial role in advancing this approach.

Meanwhile, progress in the prevention and treatment of infectious diseases and trauma has led to a shift in health care needs to a focus upon chronic disease management. The management of chronic diseases, unlike acute illness, requires repetitive visits to the doctor/hospital and the tracking of huge amounts of medical information. Thus, medical informatics has become an important field. However, development of the medical software and hardware needed has proceeded slowly, with implementation impeded by high initial cost.

Because laboratory-based research has produced huge dividends for society, support for continuing such research (especially from the Obama administration) is strong. However,
transmission of evidence-based information to those on the front lines delivering the care lags. Likewise, increased emphasis on preventive approaches to disease and promotion of wellness could markedly improve the health of the nation and reduce the costs of care but current incentives for doctors/hospitals/corporations do not support that approach.

**Implications**
The likelihood of significant changes in health care policy, as yet unknown, require us to be prepared to quickly respond to new incentives and constraints. Increased insurance coverage across the population could relieve financial stresses on our hospitals but at the same time, changing incentives (such as a shift away from the current emphasis on reimbursement per procedure), could require fundamental changes in the business model for providers. Meanwhile, UA’s emphasis on building its health sciences operations in Tucson, Phoenix and through outreach sites, positions it well to help address the problems identified above: our Phoenix campus has especially strong biomedical informatics resources, our Pharmacy School has great strength in pharmacogenomics and economics, and with contributions from all 3 public universities in the state, we are well-positioned to provide the necessary interdisciplinary education to achieve affordable health care delivered as a team.

**H) Natural Resources and Environment**
The environment has risen to the fore of the agendas of governments, publics, and businesses and will be one of the central issues of the 21st century and will likely be the site of significant research funding from both public and private sources. Major concerns include global changes in climate, the degradation of ecosystems, the search for sustainable energy sources, and the security of food, water, and health.

The southwestern region of the United States faces distinctive environmental challenges. First of all are those of managing water in a desert environment in a rapidly growing state where water constrains urban development, agriculture and industrial production, is necessary to natural ecosystems, and where there are longstanding conflicts over water rights. Water supplies may become even more constrained if climate changes according to climate projections that show that if the world continues to emit greenhouse gases at present rates then the southwest will be a hotspot for climate change with warmer conditions, lower flows on the Colorado river, increased risks of drought and fires, more heat waves, and increases in some diseases. Increased heat will increase demands for air conditioning and thus pressure energy supplies. Climate change will likely accelerate transformation of the landscape with risks to people, ecosystems, infrastructure and industries such as tourism as well as agriculture. The southwest has some of the country’s fastest growing urban areas and these too face critical decisions about urban sustainability beyond the clear concerns about water and energy. How will urban areas deal with waste, air pollution, the preservation of green spaces and the environmental justice questions about the location of hazardous facilities? Extensive public lands in the southwest are important for multiple uses including recreation, timber, grazing and conservation and their future is critical to the economy, ecosystems and cultures of the region. Large areas of the southwest are managed by Indian nations who are both vulnerable to environmental changes such as drought and climate change but are also important owners
and managers of water, energy and ecosystem resources. The US-Mexico border poses another set of environmental issues which could intensify as a result of growth, climate change or mismanagement that include the governance of shared waters and biodiversity, problems of pollution from urban and industrial development, and the institutional difficulties of managing the environment across an international border.

**Implications**

Along with the people, businesses and other institutions across the state, the UA will likely have to contend with the higher costs of water and energy and the political competitions for resources that follow from climate change. At the same time, the UA has an extraordinary opportunity to influence its destiny in this area through its contributions to knowledge and policy regarding climate change. UA has expertise in most of the essential environmental areas: e.g., water, ecosystems, climate, hydrometeorology, earth science, biogeochemistry, law, architecture, policy, economics, agriculture, engineering, decision-support, informatics, and environmental health; also, there is growing interest in environmental entrepreneurship and expertise across the social sciences in the human relationship to nature. Our strength in optical science also positions us well to contribute to the development of solar energy. It seems clear that our strategic commitment to develop our research and reputation in this area through the Institute of the Environment is wise and that we should continue to support this work.
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