



Environmental Scan

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Strategic Planning

Georgia Gwinnett College

Submitted by:

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1. Introduction



Georgia Gwinnett College serves the community.

Georgia Gwinnett College (“GGC” or “College”) selected MGT to perform strategic consulting services to provide an updated two-year strategic plan as well as reports on enrollment, academic programs, and implementation services to plan for a vibrant future. The purpose of this Environmental Scan is to provide an internal and external overview of the environment in which

Background

Georgia Gwinnett College, founded in 2006, has grown from a small college to a metropolitan college of over 11,000 students. GGC was the first four-year college founded in Georgia in more than 100 years, and the first four-year, public college created in the U.S. in the 21st century. GGC recently earned the federal designation as a Hispanic Serving Institution. GGC’s groundbreaking, four-year college model changes how educators facilitate and support student learning. The innovative model is characterized by GGC’s integrated approach to three critical elements: attention, affordability, and access as the primary ways for serving the community.

In addition to serving Gwinnett County with 70% of students coming from the local area, GGC also admits students from Georgia, other states, and other countries. Most recently, GGC has entered into an agreement that allows the College to offer instate tuition to students from Georgia, Florida, Alabama, Tennessee, North Carolina, and South Carolina.

Methodology

MGT utilizes several tools and databases to assess key focus areas such as demographics, educational attainment, workforce, and occupational trends. One such tool is Lightcast, a labor market analytics modeling tool which draws data from sources such as the Bureau of Labor Statistics and U.S. Census Bureau. Further, MGT conducts primary and secondary research accessed via systems such as the Integrated Postsecondary Education Data System (IPEDS) and National Center for Education Statistics as well as peer-reviewed research and policy briefs imparting empirical findings and best practice in the field.

2. Evolving Demographics

The population in the Gwinnett County grew by 6% over the past five years and is projected to grow by 3% over the next five years. Additionally, the population is projected to increase by 7% by 2032, which is a lower percentage increase than the state of Georgia (8%) but more than the nation (4%).

The populations in Georgia, Florida, Alabama, Tennessee, North Carolina, and South Carolina are expected to grow by 9% cumulatively and individual changes in growth are captured in Exhibit 1. Population of Gwinnett County, States, and Nation, 2022-2032..

Exhibit 1. Population of Gwinnett County, States, and Nation, 2022-2032.

Area	2022 Population	2032 Population	Change	% Change
Gwinnett County	973,831	1,044,971	71,139	7%
Georgia	10,928,582	11,841,498	912,916	8%
Alabama	5,071,491	5,208,835	137,344	3%
Florida	22,076,678	24,294,853	2,218,175	10%
North Carolina	10,686,246	11,663,546	977,300	9%
South Carolina	5,268,553	5,832,687	564,134	11%
Tennessee	7,050,077	7,509,908	459,831	7%
Nation	334,161,482	346,021,335	11,859,853	4%

Source: LIGHTCAST, Q4 2022 Data Set.

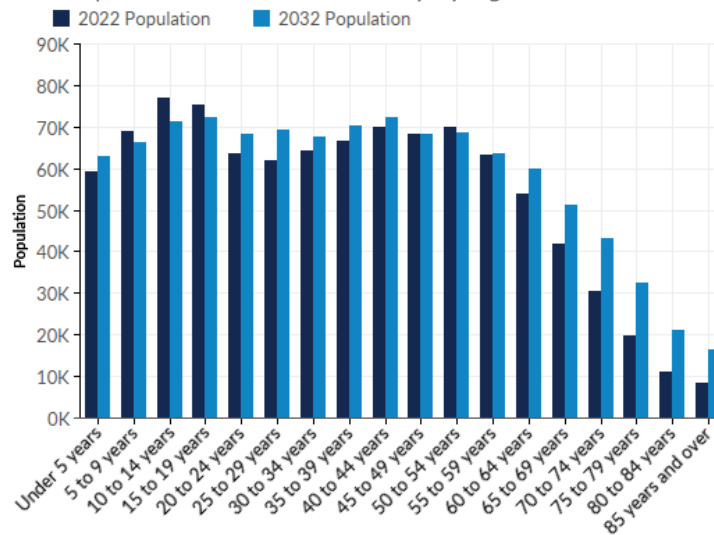
Population by Age

GGC may be challenged by some declining and some increasing traditional college age population at the local as well as state and national levels. In Gwinnett County, those between the ages of 15 and 19 are projected to decrease by 4%, while those ages 20 to 24 are expected to increase by 7%.

2. EVOLVING DEMOGRAPHICS

Gwinnett County Population

Exhibit 2. Population in Gwinnett County by Age Cohort 2022-2032.



Age Cohort	2022 Population	2032 Population	Change	% Change	2032 % of Cohort
Under 5 years	59,133	62,839	3,706	6%	6.01%
5 to 9 years	68,813	66,108	(2,705)	(4%)	6.33%
10 to 14 years	76,981	71,375	(5,605)	(7%)	6.83%
15 to 19 years	75,383	72,349	(3,035)	(4%)	6.92%
20 to 24 years	63,617	68,370	4,752	7%	6.54%
25 to 29 years	61,928	69,178	7,250	12%	6.62%
30 to 34 years	64,373	67,418	3,045	5%	6.45%
35 to 39 years	66,674	70,333	3,659	5%	6.73%
40 to 44 years	70,076	72,102	2,026	3%	6.90%
45 to 49 years	68,135	68,340	206	0%	6.54%
50 to 54 years	70,017	68,536	(1,481)	(2%)	6.56%
55 to 59 years	63,204	63,688	484	1%	6.09%
60 to 64 years	53,975	59,878	5,903	11%	5.73%
65 to 69 years	41,919	51,226	9,308	22%	4.90%
70 to 74 years	30,375	43,104	12,729	42%	4.12%
75 to 79 years	19,739	32,462	12,723	64%	3.11%
80 to 84 years	11,065	21,216	10,152	92%	2.03%
85 years and over	8,425	16,447	8,023	95%	1.57%
Total	973,831	1,044,971	71,139	7%	100.00%

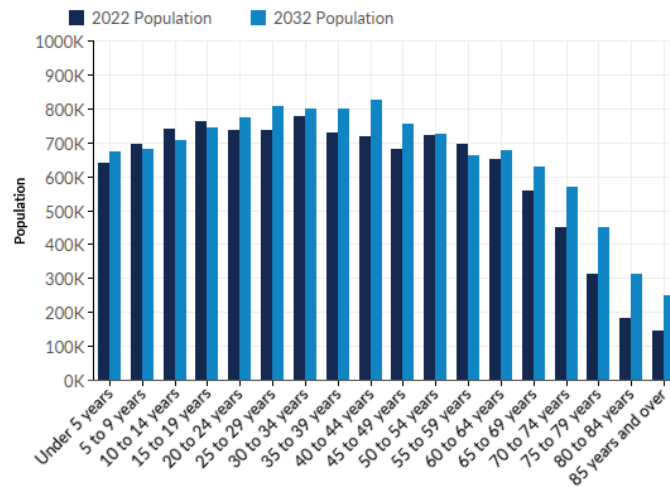
Source: LIGHTCAST, Q4 2022 Data Set.

2. EVOLVING DEMOGRAPHICS

Georgia Population

In Georgia, a similar trend arises in comparison to Gwinnett County as the 15-19 ages cohort will experience a 2% decrease, but a 5% increase for the 20-24 ages cohort.

Exhibit 3. Population in Georgia by Age Cohort 2022-2032.



Age Cohort	2022 Population	2032 Population	Change	% Change	2032 % of Cohort
Under 5 years	639,816	674,012	34,196	5%	5.69%
5 to 9 years	694,728	680,993	(13,735)	(2%)	5.75%
10 to 14 years	741,168	707,756	(33,412)	(5%)	5.98%
15 to 19 years	762,372	743,661	(18,711)	(2%)	6.28%
20 to 24 years	735,311	774,701	39,390	5%	6.54%
25 to 29 years	737,039	806,639	69,600	9%	6.81%
30 to 34 years	775,815	798,859	23,045	3%	6.75%
35 to 39 years	728,671	799,545	70,874	10%	6.75%
40 to 44 years	718,039	826,797	108,758	15%	6.98%
45 to 49 years	679,269	754,345	75,076	11%	6.37%
50 to 54 years	721,597	724,016	2,420	0%	6.11%
55 to 59 years	695,137	663,200	(31,937)	(5%)	5.60%
60 to 64 years	652,277	675,960	23,682	4%	5.71%
65 to 69 years	558,250	628,630	70,380	13%	5.31%
70 to 74 years	449,085	568,071	118,986	26%	4.80%
75 to 79 years	312,763	450,723	137,960	44%	3.81%
80 to 84 years	181,143	313,767	132,625	73%	2.65%
85 years and over	146,103	249,822	103,719	71%	2.11%
Total	10,928,582	11,841,498	912,916	8%	100.00%

Source: LIGHTCAST, Q4 2022 Data Set.

Selected state population by Traditional College Age

When considering the cohort of ages 15-19 in surrounding states, those in Alabama (2%), North Carolina (1%), and Tennessee (0%) will experience a decrease in population. While the decrease in Tennessee is negligible, 1,994 less individuals are expected in this cohort. Florida and South Carolina will both expect an increase in this cohort of 3% each. Overall, in the nation, this cohort is projected to decline by 4% with a decrease of 762,298 individuals.

Exhibit 4. Population in States by 15-19 Age Cohort 2022-2032.

Area	2022 Population Age 15 to 19	2032 Population Age 15 to 19	Change	% Change
Alabama	325,431	319,488	(5,943)	(2%)
Florida	1,251,702	1,288,228	36,526	3%
Georgia	762,372	743,661	(18,711)	(2%)
North Carolina	705,203	699,339	(5,864)	(1%)
South Carolina	337,706	346,824	9,118	3%
Tennessee	441,763	439,769	(1,994)	(0%)
Nation	21,713,422	20,951,124	(762,298)	(4%)

Source: LIGHTCAST, Q4 2022 Data Set.

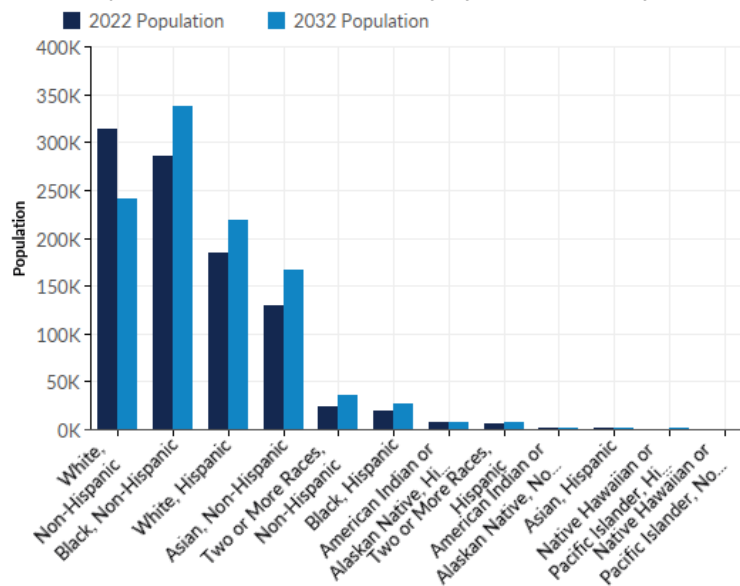
Population by Race and Ethnicity

The race and ethnicity of the population in Gwinnett and Georgia will change over the next 10 years.

Gwinnett County Population

In Gwinnett County, population dynamics over the following ten years are anticipated to lead to a 23% decline in the White, non-Hispanic population. The split of racial cohorts indicates a rise in the percentage of people who identify as Black (34.9%), Hispanic (24.4%) and Asian (16.1%) by 2032. These developments might influence the diversity of the student body at Georgia Gwinnett College.

Exhibit 5. Population in Gwinnett County by Race/Ethnicity 2022-2032.



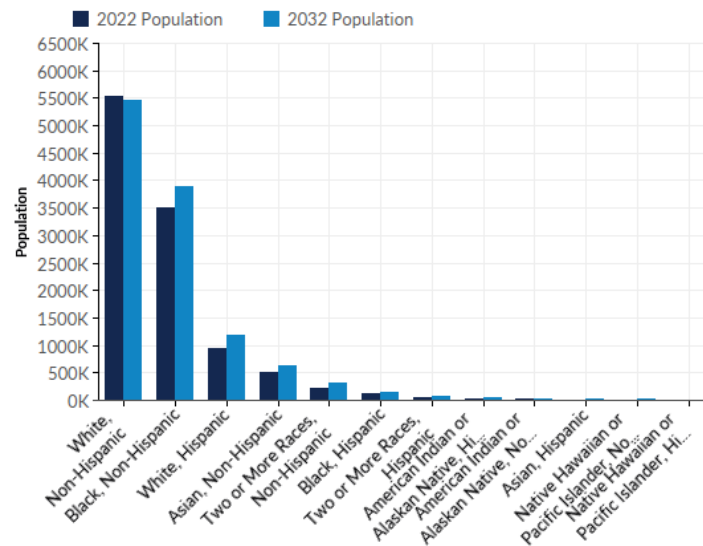
Race/Ethnicity	2022 Population	2032 Population	Change	% Change	2032 % of Cohort
White, Non-Hispanic	313,175	241,277	(71,898)	(23%)	23.1%
Black, Non-Hispanic	285,610	338,215	52,605	18%	32.4%
White, Hispanic	184,934	218,206	33,272	18%	20.9%
Asian, Non-Hispanic	129,844	166,190	36,346	28%	15.9%
Two or More Races, Non-Hispanic	24,520	35,348	10,829	44%	3.4%
Black, Hispanic	19,076	26,348	7,272	38%	2.5%
American Indian or Alaskan Native, Hispanic	6,698	7,186	488	7%	0.7%
Two or More Races, Hispanic	5,869	7,469	1,599	27%	0.7%
American Indian or Alaskan Native, Non-Hispanic	1,526	1,432	(94)	(6%)	0.1%
Asian, Hispanic	1,506	2,125	619	41%	0.2%
Native Hawaiian or Pacific Islander, Hispanic	654	757	103	16%	0.1%
Native Hawaiian or Pacific Islander, Non-Hispanic	421	419	(2)	(0%)	0.0%
Total	973,831	1,044,971	71,139	7%	100.0%

Source: LIGHTCAST, Q4 2022 Data Set.

Georgia Population

Only the White, non-Hispanic population of Georgia will see a 1% decline. They will nonetheless continue to make up nearly half of the population. Those who identify as Black will represent approximately 34.2% of the population, while those who identify as Hispanic will comprise 12.4% of the population.

Exhibit 6. Population in Georgia by Race/Ethnicity 2022-2032.



Race/Ethnicity	2022 Population	2032 Population	Change	% Change	2032 % of Cohort
White, Non-Hispanic	5,524,112	5,461,897	(62,215)	(1%)	46.1%
Black, Non-Hispanic	3,503,961	3,901,392	397,432	11%	33.0%
White, Hispanic	935,485	1,172,029	236,544	25%	9.9%
Asian, Non-Hispanic	499,378	638,705	139,327	28%	5.4%
Two or More Races, Non-Hispanic	226,767	322,663	95,897	42%	2.7%
Black, Hispanic	111,063	153,723	42,660	38%	1.3%
Two or More Races, Hispanic	39,482	63,519	24,037	61%	0.5%
American Indian or Alaskan Native, Hispanic	35,499	50,313	14,814	42%	0.4%
American Indian or Alaskan Native, Non-Hispanic	25,978	34,198	8,221	32%	0.3%
Asian, Hispanic	11,226	17,948	6,721	60%	0.2%
Native Hawaiian or Pacific Islander, Non-Hispanic	8,246	13,045	4,800	58%	0.1%
Native Hawaiian or Pacific Islander, Hispanic	7,386	12,066	4,680	63%	0.1%
Total	10,928,582	11,841,498	912,916	8%	100.0%

Source: LIGHTCAST, Q4 2022 Data Set.

3. Economic Overview

Labor Force Participation

Labor force participation provides an understanding of whether individuals are working, actively seeking a job, or unemployed and are not seeking work for any reason. The “Not in the labor Force” category refers to those who are not actively seeking work whereas those who are unemployed are actively seeking employment. The following presents the current labor force breakdown in Gwinnett County as of 2022. According to data, out of the 51.9% of residents who are in the labor force, 97.7% are employed whereas 2.3% are unemployed.

Exhibit 7. Labor Force Breakdown in Gwinnett County, 2022.



Source: LIGHTCAST, Q4 2022 Data Set.

Out of the 51.5% of residents in the Atlanta MSA (Atlanta-Sandy Springs-Alpharetta) who are in the labor force, 97.5% are employed, and 2.5% are unemployed.

Exhibit 8. Labor Force Breakdown in Atlanta MSA, 2022.

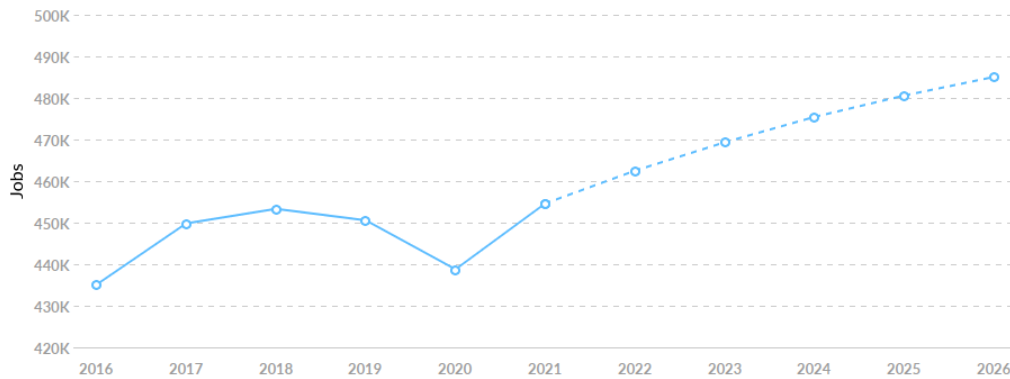


Source: LIGHTCAST, Q4 2022 Data Set.

Employment

Overall job growth in the area since 2016 increased by 4.5%, adding 19,546 jobs as of 2021 for a total of 454,622. This change outpaced the national growth rate of 1.9% by 2.6%. Between 2021 and 2026, projections indicate an additional 30,440 anticipated positions for a total of 485,062 jobs by 2026, a 6.7% increase.

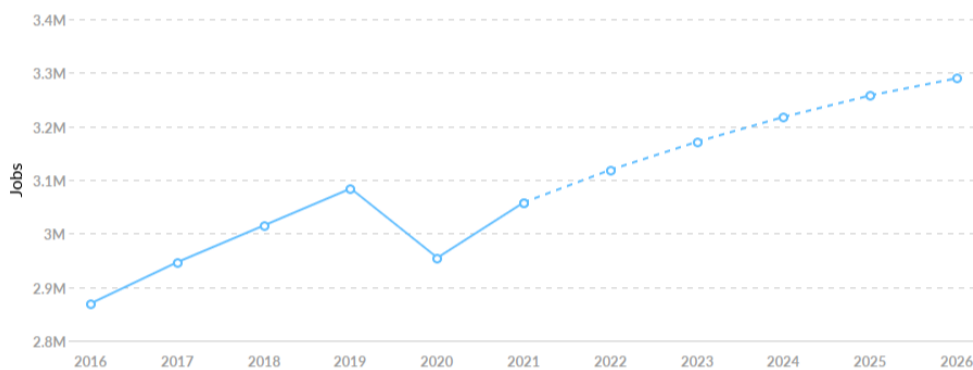
Exhibit 9. Job Growth for Gwinnett County, 2016-2026.



Source: LIGHTCAST, Q4 2022 Data Set.

From 2016 to 2021, jobs increased by 6.6% in Atlanta MSA from 2,869,724 to 3,058,324. This change outpaced the national growth rate of 1.9% by 4.7%. By 2026, predictions indicate an estimate of 3,289,906 jobs, a 7.6% increase.

Exhibit 10. Job Growth for Atlanta MSA, 2016-2026.



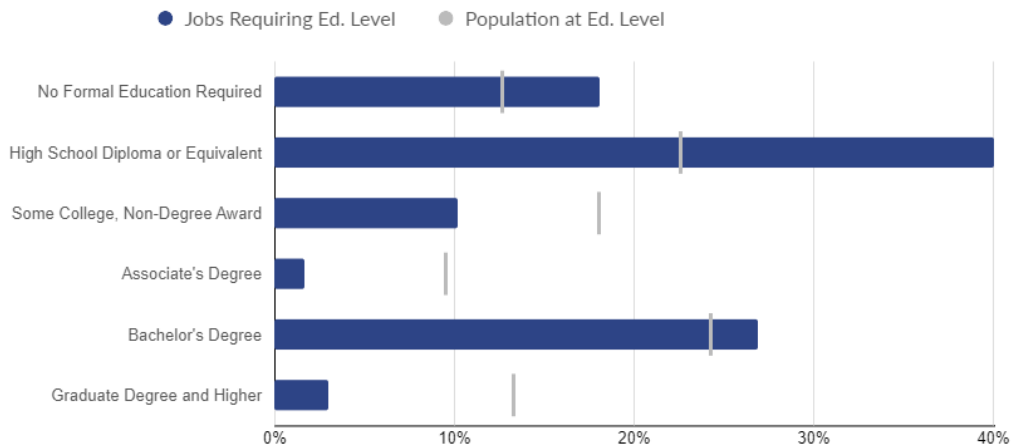
Source: LIGHTCAST, Q4 2022 Data Set.

Underemployment

A comparison of the educational attainment of the population in the Gwinnett County to jobs that require a specific level of education indicate more jobs that require no formal education, a high school diploma or equivalency, or a bachelor's degree than the number of people who reached the education level in Gwinnett County. This highlights the need for more people with bachelor's degrees and shows potential underemployment of those with certificates (non-degree awards), associate degrees, or master's degrees. Comparatively, the same holds true for the Atlanta MSA.

Nationally, employers are opting to focus on skills and experience allowing them to consider previously overlooked candidates.¹ In 2017, 51% of online job listings required a four-year degree. By 2021, that share has declined to 44%. This is consistent to the national trend of employers adjusting educational requirements for a variety of occupations, eliminating the need for a bachelor's degree for many intermediate as well as some senior positions. In mandating a degree, 64% of nationwide working-age individuals without a degree are automatically excluded from consideration. This shift in how employers are focusing on skills-based hiring has the potential to change the way higher education operates. Projections indicate an additional 1.4 million jobs could open to workers without college degrees over the next five years.²

Exhibit 11. Underemployment in Gwinnett County, 2021.



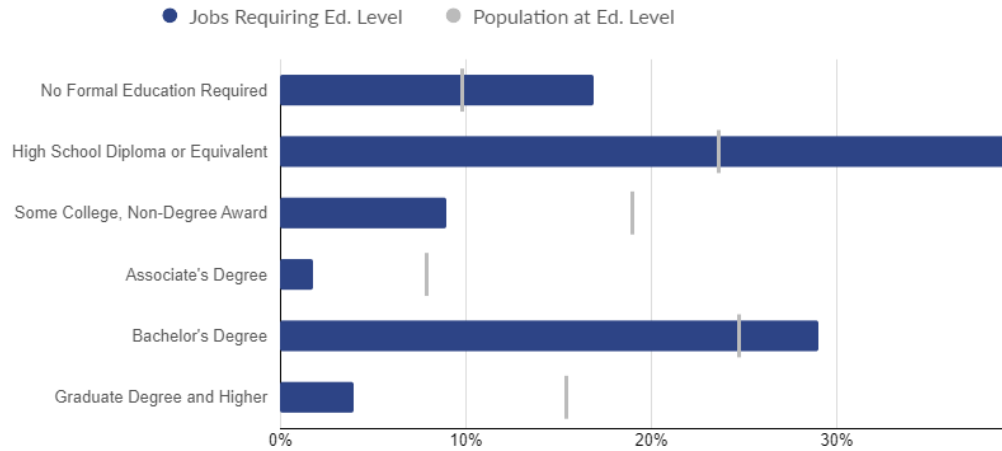
Source: LIGHTCAST, Q4 2022 Data Set.

¹ Lohr, S. (2022, April 8). A 4-year degree isn't quite the job requirement it used to be. The New York Times.

² The Burning Glass Institute. The Emerging Degree Reset: How the Shift to Skills-Based Hiring Holds the Keys to Growing the U.S. Workforce at a Time of Talent Shortage.

3. ECONOMIC OVERVIEW

Exhibit 12. Underemployment in Atlanta MSA, 2021.



LIGHTCAST, Q4 2022 Data Set.











Source:

Employers

In 2022, 8,641 companies in Gwinnett County, GA posted 248,810 total job listings, of which 113,905 were unique postings. These figures provide a posting intensity of 2 to 1, or 1 unique job posting for every 2 postings. This indicates that they are undertaking an average effort to fill this post as it is near to the Posting Intensity for all other occupations and businesses in the area (2-to-1). Randstad posted 2,020 unique postings accounting for 1.8% of those in Gwinnett County. With 1,237 listings, Gwinnett County Public Schools made up 1.1% of all job postings. The 8:1 posting intensity indicates high efforts in finding employees to fill roles. Northside Hospital published 1,104 job advertisements, accounting for 1.0% of all postings.

3. ECONOMIC OVERVIEW

Exhibit 13. Top Employing Companies in Gwinnett County 2022.











Company	Total/Unique (Jan 2022 - Dec 2022)	Posting Intensity
Randstad	4,155 / 2,020	2 : 1 
Gwinnett County Public Schools	9,294 / 1,237	8 : 1 
Northside Hospital	2,534 / 1,104	2 : 1 
Amazon	3,732 / 809	5 : 1 
State of Georgia	1,410 / 733	2 : 1 
Walmart	1,318 / 661	2 : 1 
Piedmont Healthcare	1,024 / 616	2 : 1 
Macy's	1,265 / 510	2 : 1 
Robert Half	643 / 500	1 : 1 
The Home Depot	1,118 / 460	2 : 1 

Source: LIGHTCAST, Q4 2022 Data Set.

In the Atlanta MSA, 385,304 businesses published 2.34 million job listings in total in 2022, of which 987,618 were unique. According to these figures, there are two job ads for every one unique job posting. Emory Healthcare published 15,012 distinct postings, or 1.5% of all those posted in the Atlanta MSA. Wellstar Health System accounted for 1.2% of all unique job postings with 11,962 entries. The 5:1 posting intensity implies significant efforts to fill positions with qualified candidates. In addition, Randstad, which accounted for 1.2% of all postings, issued 11,393 job advertisements.

3. ECONOMIC OVERVIEW

Exhibit 14. Top Employing Companies in Atlanta MSA 2022.

Company	Total/Unique (Jan 2022 - Dec 2022)	Posting Intensity	Median Posting Duration
Emory Healthcare	40,209 / 15,012	3 : 1 	32 days
Wellstar Health System	59,570 / 11,962	5 : 1 	22 days
Randstad	23,485 / 11,393	2 : 1 	20 days
The Home Depot	22,059 / 6,025	4 : 1 	27 days
Amazon	18,320 / 5,429	3 : 1 	27 days
State of Georgia	8,834 / 5,391	2 : 1 	28 days
Piedmont Healthcare	8,325 / 5,088	2 : 1 	27 days
Marriott International	15,965 / 4,865	3 : 1 	26 days
Walmart	9,278 / 4,373	2 : 1 	27 days
Northside Hospital	13,089 / 4,166	3 : 1 	26 days

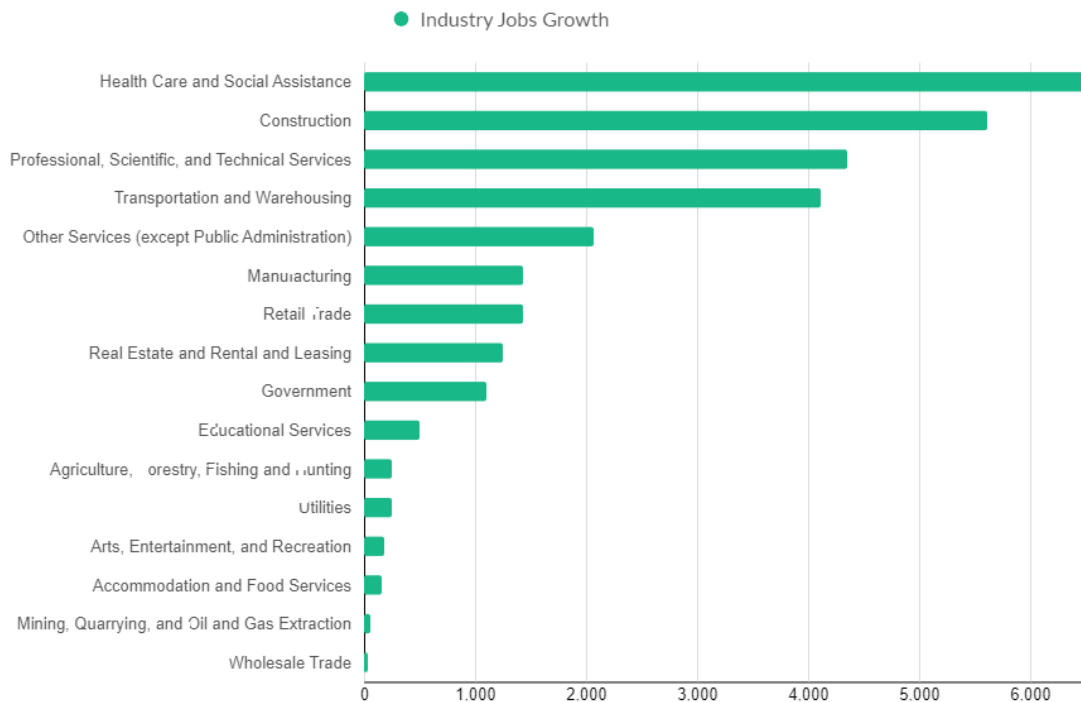
Source: LIGHTCAST, Q4 2022 Data Set.

Economic Drivers

Top Growth Industries

The largest rise in jobs since 2016 has been in the health care and social assistance sector, which employed 39,120 people by 2021 after 6,508 new positions are added. Construction has experienced a 23% increase in jobs to account for 29,973 jobs by 2021. While there was only a 13% increase in jobs in the professional, scientific, and technical services industry, the addition of 4,349 jobs led to 36,758 employees in the associated roles.

Exhibit 15. Top Growing Industries in Gwinnett County 2021.



Source: LIGHTCAST, Q4 2022 Data Set.

3. ECONOMIC OVERVIEW

In the Atlanta MSA, professional, scientific, and technological services experienced the greatest increase in employment, adding 38,030 new positions since 2016 to reach 260,231 workers by 2021. By 2021, there were 315,934 positions in the health care and social support sectors, representing an 11% growth. The number of jobs in the transportation and warehousing sector increased by only 18%, but the 27,024 additional jobs led to 178,561 jobs in the related roles.

Exhibit 16. Top Growing Industries in Atlanta MSA 2021.

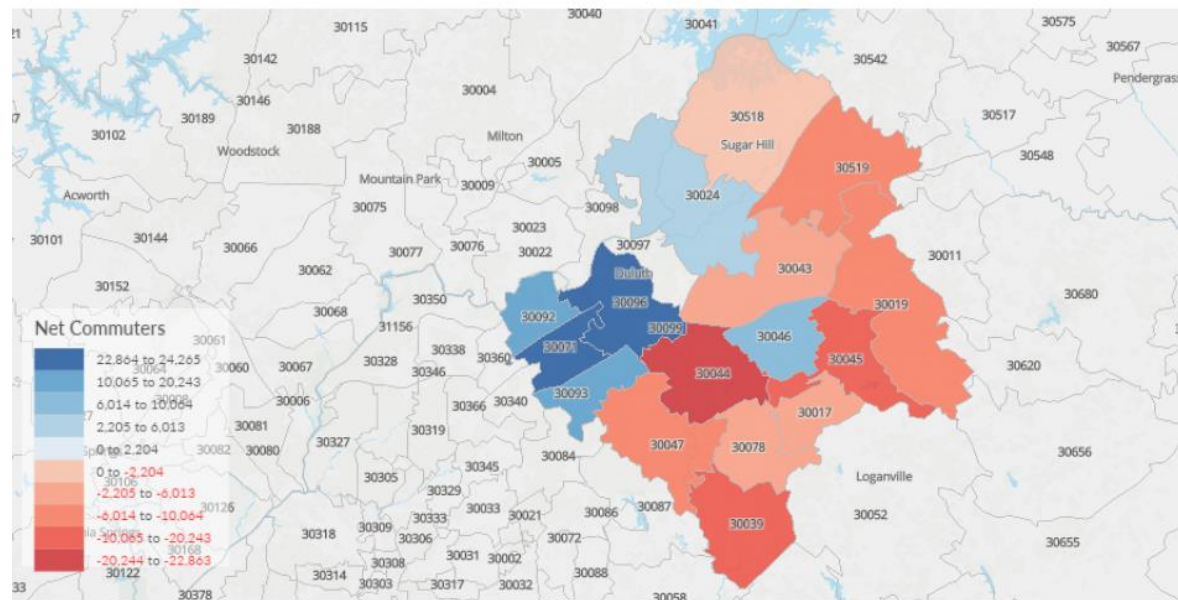


Source: LIGHTCAST, Q4 2022 Data Set.

4. Community Indicators

In 2021, Duluth (zip code 30096), which had 60,109 jobs, employed the majority of Gwinnett County residents. With 41,741 employees, Lawrenceville (zip code 30043) was the third most popular site for employment. Given the combined 85,526 residents of two popular zip codes (30043 and 30044), Lawrenceville was the preferred location for employees to reside. Given that 44,816 residents living in the 30043-zip code of Lawrenceville, 3,075 of these residents do not work in the same area.

Exhibit 17. Gwinnett County Employee Residence and Work Trends, 2021.



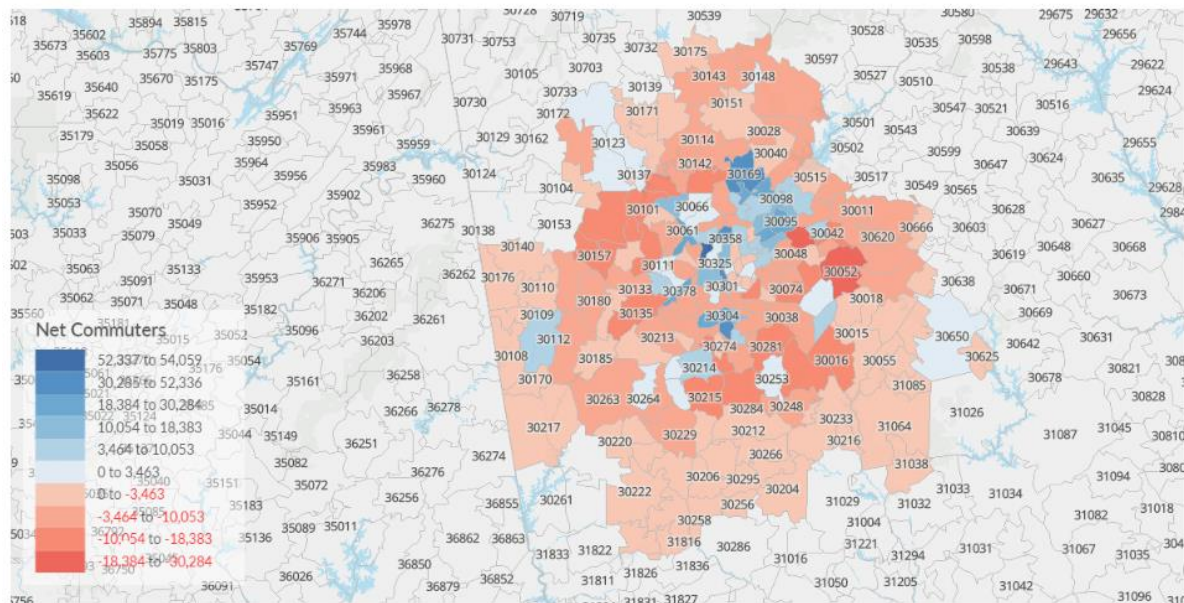
Where Talent Works			Where Talent Lives		
ZIP	Name	2021 Employment	ZIP	Name	2021 Workers
30096	Duluth, GA (in Gwinnett county)	60,109	30024	Suwanee, GA (in Gwinnett county)	45,835
30024	Suwanee, GA (in Gwinnett county)	49,379	30043	Lawrenceville, GA (in Gwinnett co)	44,816
30043	Lawrenceville, GA (in Gwinnett co)	41,741	30044	Lawrenceville, GA (in Gwinnett co)	40,710
30071	Norcross, GA (in Gwinnett county)	40,923	30096	Duluth, GA (in Gwinnett county)	37,245
30093	Norcross, GA (in Gwinnett county)	37,520	30047	Lilburn, GA (in Gwinnett county)	34,135

Source: LIGHTCAST, Q4 2022 Data Set.

4. COMMUNITY INDICATORS

In the top 5 zip codes in 2021, Atlanta (zip codes 30339, 30328, and 30309) had 197,362 workers, which made it the most populated region. The 2nd most prevalent location for employment was Alpharetta (zip code 30004), which had 73,061 workers. Given that 2 popular zip codes (30043 and 30044) have a total population of 89,934, Lawrenceville is where most employees opted to live. The 30040 and 30041 zip codes in Cumming had 88,059 residents, making it the 2nd most popular place for workers to live.

Exhibit 18. Atlanta MSA Employee Residence and Work Trends, 2021.



Where Talent Works			Where Talent Lives		
ZIP	Name	2022 Employment	ZIP	Name	2022 Workers
30339	Atlanta, GA (in Cobb county)	73,911	30043	Lawrenceville, GA (in Gwinnett co)	47,832
30004	Alpharetta, GA (in Fulton county)	73,061	30040	Cumming, GA (in Forsyth county)	46,775
30328	Atlanta, GA (in Fulton county)	62,385	30024	Suwanee, GA (in Gwinnett county)	46,327
30309	Atlanta, GA (in Fulton county)	61,066	30044	Lawrenceville, GA (in Gwinnett co)	42,102
30096	Duluth, GA (in Gwinnett county)	61,008	30041	Cumming, GA (in Forsyth county)	41,284

Source: LIGHTCAST, Q4 2022 Data Set.

5. Educational Landscape

High School Population and Graduation Rates

The average graduation rate for Gwinnett County Public Schools is 83%, slightly below the state rate of 84%. Schools such as Gwinnett School of Mathematics, Science, and Technology (GSMST), and North Gwinnett High School produced the highest graduation rates with 99% and 95% respectively in 2022. Schools such as Gwinnett Intervention Education (GIVE) East High School (8%), and Phoenix High School (22%) produced lower graduation rates.

Exhibit 19. Gwinnett County High School Graduation Rates, 2022.

School Name	2022
State	84%
Gwinnett County Public Schools	83%
Archer HS	89%
Berkmar HS	78%
Brookwood HS	94%
Central Gwinnett HS	79%
Collins Hill HS	82%
Dacula HS	89%
Discovery HS	80%
Duluth HS	86%
Grayson HS	92%
GIVE East HS	8%
GIVE West HS	-
Gwinnett Online Campus	57%
GSMST	99%
International Transition Center	-
Lanier HS	92%
McClure Health Sciences HS	94%
Meadowcreek HS	82%
Mill Creek HS	92%
Mountain View HS	89%
Norcross HS	81%
North Gwinnett HS	95%
Parkview HS	87%
Paul Duke STEM HS	88%
Peachtree Ridge HS	92%
Phoenix HS	22%

5. EDUCATIONAL LANDSCAPE

Shiloh HS	83%
South Gwinnett HS	80%

Source: Gwinnett County Public Schools/ Georgia Department of Education

Postsecondary Educational Pipeline

Exhibit 20 is ranked based on the largest to smallest completions in 2021. The top ten institutions in Georgia had 57,130 program graduates in 2021. There were 9,219 completions from Georgia Institute of Technology's Main Campus, or 16.1% of all graduates. The University of Georgia produced 13,166 graduates, or 23.0% of the total. Graduates from Georgia State University (8,155) accounted for 14.3% of program completions. Georgia Gwinnett College was the top 14th school for 2021 completions with 1,208, or 2.1%.

Exhibit 20. Top 10 Graduation Trends for Georgia Colleges.

School	2017	2018	2019	2020	2021	Graduation Trend
University of Georgia	11,197	11,810	12,071	12,804	13,166	
Georgia Institute of Technology-Main Campus	6,676	7,089	7,481	8,534	9,219	
Georgia State University	7,796	7,784	7,857	8,062	8,155	
Kennesaw State University	6,076	6,220	6,878	7,274	7,667	
Georgia Southern University	4,289	5,916	5,874	5,745	5,812	
University of North Georgia	3,097	3,361	3,213	3,183	3,247	
University of West Georgia	2,673	2,732	2,784	3,055	2,968	
Valdosta State University	2,607	2,499	2,447	2,550	2,631	
Augusta University	1,869	1,938	2,209	2,211	2,425	
Georgia College & State University	1,694	1,720	1,795	1,892	1,840	
Georgia Gwinnett College	1,017	1,135	1,182	1,127	1,208	

Source: LIGHTCAST, Q4 2022 Data Set.

Completion by Degree Type

In 2021, across the top ten institutions and GGC, there were 37,697 completions that resulted in a bachelor's degree. The majority were obtained at the University of Georgia (8,870) which accounted for 23.5% of the bachelors degree earned. With 35.1% of the master's degree completions, Georgia Institute of Technology-Main Campus (4,762) produced the most master's degree completions. The University of Georgia had 912 completions that led to a doctor's degree, which accounted for 33.0% of this degree completion.

Exhibit 21. Top 10 Georgia College 2021 Completion by Degree Type.

School	Bachelor's Degree Completions	Master's Degree Completions	Doctor's Degree Completions
University of Georgia	8,870	1,952	912
Kennesaw State University	5,969	1,161	38
Georgia State University	5,480	1,921	489
Georgia Southern University	4,395	1,103	116

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School	Bachelor's Degree Completions	Master's Degree Completions	Doctor's Degree Completions
Georgia Institute of Technology-Main Campus	3,879	4,762	577
University of North Georgia	2,159	203	47
University of West Georgia	1,895	675	30
Valdosta State University	1,563	759	55
Georgia Gwinnett College	1,208	0	0
Georgia College & State University	1,195	535	13
Augusta University	1,084	502	490

Source: LIGHTCAST, Q4 2022 Data Set.

6. Institutional Comparisons

Institutional Comparisons were selected in cooperation with GGC to provide a brief highlight of other institutions in the higher education space. Two institutions were selected as competitors for the same students, two were selected as peers that operate similar ways, and four were selected as aspirational institutions that provide a model for GGC to meet and exceed. The overview is a review of key factors and outcomes including enrollment, student/faculty ratios, tuition, transfer, retention, and graduation rates.

Compared to these institutions, Georgia Gwinnett College ranks 7th place in terms of enrollment when including undergraduate and graduate enrollees given the 10,949 students in 2021. Despite the 566 faculty members, the college has the lowest student/ faculty ratio of all the analyzed schools. In terms of tuition, the \$4,948 rate indicates GGC as the 2nd most cost effective option behind Middle Georgia College (\$4,042). With the 40% transfer out rate, GGC has the 2nd highest rate among the institutions. When considering retention rates, the 59% indicates the college has the 2nd lowest rate, just 4% higher than the 55% at Middle Georgia College. With a 29% rate, GGC ranks last place in terms of graduation outcomes.

Exhibit 22. Institutional Comparison Overview

Institution	Undergraduate Enrollment (Fall 2021)	Graduate Enrollment	Faculty	S/F Ratio	In State Tuition 2021-2022	Transfer Out Rate	Retention Rate	Graduation Rate
Georgia Gwinnett College	10,949	-	566	19:1	\$4,948	40%	59%	21%
Kennesaw State University	38,891	4,008	1,294	33:1	\$6,436	29%	74%	49%
Georgia State University	28,985	7,988	1,407	26:1	\$9,286	22%	75%	56%
Middle Georgia State University	7,457	386	270	29:1	\$4,042	46%	55%	22%
Oregon Institute of Technology	4,776	134	163	30:1	\$11,623	26%	68%	56%
Florida Gulf Coast University	14,228	1,681	529	30:1	\$6,118	13%	82%	56%
Minnesota State University-Mankato	12,938	1,823	750	20:1	\$9,146	32%	79%	52%
Tarleton State University	11,666	2,329	437	32:1	\$7,790	31%	70%	49%
Georgia Southern University	23,527	3,549	1,010	27:1	\$6,485	29%	72%	54%

Source: College Navigator.

Competitive Comparisons

Peer Comparisons

Aspirational Comparisons

Institutional Summaries

The following overview is a snapshot summary of each institution and an outline of the institution's strategic planning. This information will provide a comparison for GGC to review in context for prioritization and consideration of how to advance GGC.

Competitive Comparisons

KENNESAW STATE UNIVERSITY



With 38,891 undergraduate students and 4,008 graduate students, Kennesaw State University (KSU) had the most undergraduate enrollment of all the compared schools. KSU also had the highest student faculty ratio at 33:1. The tuition of \$6,436 places the school as the 4th most affordable institution. A 74% retention rate ranks it the 4th school in terms of maintaining students from their freshman to sophomore year. The graduation rate of 49% was similar to that of Tarleton State University. The transfer out rate of 29% was similar to that of Georgia Southern University, and 11% lower than that of Georgia Gwinnett College.

"The Roadmap to R2 Success" strategic plan offers four pillars with specific objectives. The first objective outlines ways to advance community and culture through programs that instruct students about inclusivity and hold events to honor partners, organizations, and public servants. The improvement of class accessibility, strategically enhancing the effectiveness of advisement, and expanding external support for scholarships is expected to contribute to the objective of improving undergraduate educational experiences. The institution intends to create new graduate degree programs, improve capability to support graduate research, teaching assistants and admissions processes, and expand graduate programs and enrollment. Steps will be taken to advance entrepreneurship and innovation opportunities that result from research, as well as to identify specific study areas of excellence for the University in collaboration with community stakeholders. Programs to support faculty and student collaboration in research will also be sustained and expanded.³

GEORGIA STATE UNIVERSITY



Georgia State University (GSU) has the highest number of graduate students with 7,988 enrollees in 2021. With a 26:1 student faculty ratio, the school has the 3rd lowest ratio. The \$9,286 tuition indicates the University had the 2nd highest tuition rate. In terms of retention, the institution has the 3rd highest rate of retention. The 56% graduation rate indicates the institution has one of the largest graduation rates

of the comparison institutions. The 22% transfer out rate places the school as 2nd place in terms of the least number of students leaving after the first year.

The "Accelerate 2025" strategic plan presents a five-year strategy to raise University performance. The growth plan is embodied by the fundamental principles of impact, community, curiosity, openness, and

³ Kennesaw State University Strategic Plan, 2023

inclusiveness. The three objectives that make up the "innovation for everyone" vision are each supported by three specific success tactics. The strategies outlined are integrating experimental programs into each academic program to better prepare students for leadership and innovation, developing students' leadership, learning, and collaboration skills to foster creativity, and broadening the Robinson Anywhere software to improve access to high schools, alumni, and lifelong learners. GSU intends to launch the Community of Business Innovation as a portal that enables business and strategic partners to engage with GSU students and faculty in ways that promote the objectives of all entities in order to invest in interdisciplinary collaboration. Additionally, the University plans to strengthen specialized knowledge in the use of emerging technologies through faculty members. The strategy allows for establishing the Social Impact Initiative, which will support the outcomes of faculty, doctoral candidates, students, and outside partners. It also calls for enhancing and embracing diversity, equity, and inclusiveness, and placing into practice solutions to increase faculty and doctoral student diversity in U.S. business schools.⁴

Peer Comparisons

MIDDLE GEORGIA STATE UNIVERSITY



With 7,843 total enrollments in 2021, Middle Georgia State University (MGSU) had the second lowest enrollment. Despite the low enrollment, the 29:1 staff to faculty ratio places the institution in the middle. The tuition of \$4,042 indicates the school as the most affordable across all compared schools. The 55% retention rate places the school as the highest rate of students leaving the institution after their freshman year. The 22% graduation rate places the school in the 2nd to last place of students completing their degree program. The college has the highest transfer rate at 46%.

To achieve its objectives, the "Elevating Middle Georgia" strategic plan identifies three key growth initiatives. The school seeks to increase the number of in-person students by improving the learning environment across all of its physical facilities and expanding the number of completely online programs that are available to students all over the nation in order to increase enrollment remotely. The institution plans to create academic pipelines, offer degrees ranging from bachelor's to doctoral, and increase student participation through initiatives, advising, and resources aimed at influencing learning and experiences in order to enhance student achievement. The college seeks to promote engagement to advance the University and region as well as attract, retain, nurture, and acknowledge talent. MGSU also plans to maintain financial health and increase needs-based aid.⁵

⁴ Georgia State University Strategic Plan: Accomplishing More, 2018

⁵ Strategic Plan: Middle Georgia State University, 2023

OREGON INSTITUTE OF TECHNOLOGY



The lowest overall, graduate, and undergraduate enrolment in 2021 was at Oregon Institute of Technology (OIT) with 4,910 enrollees. This institution has the highest tuition of all those considered, at \$11,623. The school had a 30:1 student to faculty ratio, which was among the third highest. In terms of retention, OIT has the 3rd lowest rate of 68%. The institution has one of the highest graduation rates among the schools under comparison, as demonstrated by its 56% graduation rate. The institute has a 26% transfer rate placing it in 3rd place in terms of the least number of students leaving.

In order to promote the institution until 2026, the "Oregon Tech Together" strategic plan offers four pillars that define objectives. The OIT intends to implement tailored enrollment management techniques for underrepresented students, including engagement and collaboration with high schools and communities, to strengthen the pledge to student success. Additionally, the school plans to expand guidance for and awareness of academic and educational services for student development and progress. The institution intends to use impactful strategies such as undergraduate research and interactive learning to support students' academic achievement. OIT also aims to expand opportunities and resources for employees' professional development to progress their competences in their disciplines. Finally, it seeks to include collaborations with business, governmental entities, and other affiliates to maintain cutting-edge technology in the classroom. The school strives toward being open, accessible, and data-driven in planning, to preserve dedication to sustainability and renewable energy through research and University intervention, and to improve philanthropic efforts among core supporters and endowment financing in order to foster the commitment to community.⁶

Aspirational Comparisons

FLORIDA GULF COAST UNIVERSITY



Florida Gulf Coast University (FGCU) has the 4th highest enrollment of all the compared institutions, totaling 15,909 students. The 30:1 student to faculty ratio was among the third highest after accounting for the 134 graduates. FGCU is the third most economical option, with a tuition of \$6,118 and has the greatest retention rate (82%), keeping students through their freshman and sophomore years. The 56% graduation percentage was comparable to that of Georgia State University and Oregon Institute of Technology. The University at 13% has the lowest transfer out rate.

FGCU's current strategic plan is anticipated to be completed in July 2023. The goals of the university are defined by five pillars in the current "Florida Gulf Coast University Focus" strategic plan. The improvement of retention and graduation rates, the integration of an extensive enrollment

⁶ Strategic Plan | Oregon Tech, 2021

management initiative that introduces students to researchers and employees, the availability of an affordable education and the reduction of the burden of education debt, and the creation of resources for student engagement with employees to foster a sense of community are the main objectives of student success. Academic excellence is achieved through emphasizing the establishment of new or improved programs that result in high paying and high demand jobs, by expanding externally financed research by 100% over the next five years, and by advancing the Honors College. The main objectives of entrepreneurship are to instill a business-minded attitude among all members of the University community and to expand the Institute for Entrepreneurship so that it can act as the focal point of all campus-wide entrepreneurial initiatives, with the potential to develop further into an interdisciplinary College. Focusing on clinically oriented disciplines within healthcare, creating faculty-led instructional treatment centers in primary care, rehabilitation, and behavioral health which function as medical laboratories to accumulate alternate revenue, developing advanced graduate programs that are research-based with the objectives of enhancing patient care, therapeutic approaches, and a variety of other outcomes are some of the ways that health science goals are realized. Finally, the community engagement and outreach objectives are achieved by enhancing exposure and engagement to the area, as well as by forming relationships and collaborations with the five school districts, local companies, and institutions to maximize opportunities to fuel FGCU's support for the area.⁷

MINNESOTA STATE UNIVERSITY-MANKATO



With 14,761 enrolments in 2021, Minnesota State University-Mankato (MSU-M) had the 5th greatest number of enrolled students. The institution has the 2nd lowest student-to-faculty ratio at 20:1. According to the \$9,146 tuition, the University had the 3rd highest tuition rate. MSU-M has the 2nd highest retention rate, at 79%. The University has the 5th largest graduation rate among the schools evaluated, according to its 52% graduation rate. MSU-M had the 3rd highest transfer out rate.

MSU-M does not have a current timeline for updating the strategic plan, which is currently dated 2016–2021. This version consists of six pillars, each with its own set of objectives. The University sought to improve student achievement by offering all participants an experience in data driven, student-centered advising that emphasizes retention, persistence, completion, and success in life and in career. MSU-M also sought to eliminate internal barriers to student success throughout the sophomore, junior, and senior years, through graduation, and to develop into a leader among our national institutions. The goal of elevating faculty distinction and academic achievement was to create a database of information on academic accomplishments, leadership, university distinctions and academic achievements, and to take advantage of opportunities in graduate study and research that would improve the University's reputation in these fields. The University aimed to incorporate processes, frameworks, and professional development that integrate organization and innovation in decision-making at all levels of the university, to implement an information oversight strategy and framework with substantial support and responsibility for data classification, authenticity, functionality, accessibility, and security to advance a culture of evidence.⁸

⁷ *FGCU Strategic Plan, 2017*

⁸ *Minnesota State University Strategic Plan, 2016*

TARLETON STATE UNIVERSITY



Tarleton State University (TSU) has the 4th lowest enrolment in 2021 with 13,995 total enrollees. Despite having a small student body, TSU has the 2nd highest staff to faculty ratio at 32:1. The University ranks 4th among all the compared schools for affordability, with a tuition of \$7,790. With a 70% retention rate, the school has the 4th lowest rate of freshmen leaving the institution. The institution is ranked on par with Kennesaw State University based to its 49% graduation rate. The University had the 4th highest transfer out rate at 31%.

To enhance campus outcomes, TSU has a 5-goal strategy. To maximize the TSU's effect on the academics through recruitment, targeted programming, and dynamic instructional formats, the University's primary goal includes plans for student opportunity and success. The objective of achieving academic distinction has been established by utilizing best practices in education, technology, and curriculum development, expanding academic programs, schools, and colleges, and reviewing programs, performance analysis against aspirational universities and allocating resources to hire and develop faculty and staff as well as improve academic infrastructure to increase student success. By maintaining the infrastructure to strengthen a culture of DEI at all levels, improving academic, financial, and wellness support for underrepresented populations, and incorporating intercultural experiences for students, faculty, and staff to increase appreciation of diverse viewpoints, the goal of improving diversity, equity, and inclusion has been enforced. The extension of curriculums and cooperation at all outreach campuses, as well as the improvement of educational resources and investments in sustainable research infrastructure, have all contributed to the achievement of the goal of fostering research, innovation, and economic impacts. By guaranteeing financial stability, fostering a vibrant campus community, and raising the institution's visibility, institutional prominence has to be maintained.⁹

GEORGIA SOUTHERN UNIVERSITY



Georgia Southern University (GSU) had 27,076 students, which was the 3rd highest enrollment of all the compared schools. Among the universities, the student to faculty ratio of 27:1 was the 4th lowest. TGSU ranks 6th among the most expensive universities due to its \$6,485 tuition. In terms of keeping students from their freshman to sophomore years and graduating after four years, it is ranked 5th among schools with a retention rate of 72% and graduation rate of 54%. The transfer out rate of 29% was similar to that of Kennesaw State University.

The University's strategic plan is outlined by five pillars. The recruitment of high-caliber students who convey Georgia Southern University's mission and values, improved preservation of current students and motivation of graduation, and increased accessibility and affordability of undergraduate and graduate educational resources have all contributed to the success of students. The evaluation of existing academic programs to ensure they meet regional demands and the development of new ones to fill gaps, the expansion of online learning opportunities and their accessibility, and the hiring of research personnel to support interdisciplinary research have all aided in achieving the teaching and

⁹ Tarleton Forward: 2030, 2021

6. INSTITUTIONAL COMPARISONS

research goals. The inclusion of the inclusive excellence goal is intended to strengthen the University's commitment to being a DEI-based institution, promote equitable processes with trustworthy, responsible reporting mechanisms, and develop a cohesive, inclusive culture based on shared values. The goal of operational efficiency, effectiveness, and sustainability has been upheld through cultivating a supportive workplace environment, creating tools to aid in academic pursuits and student success, and continuing to take the lead in conservation initiatives. The institutions' attempts to forge enduring partnerships and create channels characterized by open dialogue and equitable engagement with stakeholders, as well as their engagement and partnership with military representatives in the area to improve relations, have maintained community engagement.¹⁰

¹⁰ *Georgia Southern University Strategic Plan, 2023*

7. College Budget and Capital Needs

State Appropriations

The state's formula funding increases for the GGC Fall 2019 (fiscal year 2020) enrollment increase of \$2 million, a \$4 million cost of living adjustments, and the \$6 million return of excess represented in the FY21 state appropriations resulted in a rise to an increase in state appropriations of \$12.8 million in FY22. As a result of decreases in the form of a 6% in enrollment from 2020–2021 to 2021–2022, direct loans, \$5.7 million in the expenditure of the scholarship allowance, and an increase in Higher Education Emergency Relief Fund (HEERF) financing, tuition and fees overall increased by \$2.9 million, net of waivers.

Revenues

The College's total revenue has increased by 25.1% since 2021. Most of the operating income, or 21.0% of all operating revenues in FY22, came from tuition and fees. Investment gain/loss was the only revenue source this fiscal year that was negative, recording a \$196,551 loss since 2021, a 284.7% decline. The highest increase in operational revenue, up 317.7%, was in sales and services.

Source	June 2021	June 2022	Change	% Change
Tuition and Fees	\$35,534,171	\$38,426,929	\$2,892,758	8.1%
Grants and Contracts	\$857,577	\$922,495	\$64,918	7.6%
Sales and Services	\$83,539	\$348,915	\$ 265,376	317.7%
Auxiliary Enterprises	\$13,251,964	\$ 14,542,532	\$1,290,568	9.7%
Other Operating Revenues	\$549,039	\$ 597,421	\$48,382	8.8%
Total Operating Revenues	\$50,276,290	\$54,838,292	\$4,562,002	9.1%
State Appropriations	\$47,411,215	\$60,174,058	\$12,762,843	26.9%
Grants and Contracts	\$46,398,542	\$63,573,778	\$17,175,236	37.0%
Gifts	\$875,741	\$738,067	\$(137,674)	15.7%
Investment Gain/Loss	\$69,029	\$(127,522)	\$(196,551)	284.7%
Other Nonoperating Revenues	\$(39,023)	\$3,369,344	\$3,408,367	8734.3%
Total Nonoperating Revenues	\$94,715,504	\$127,727,725	\$33,012,221	34.9%
State Capital Gifts and Grants	-	\$585,571	\$585,571	-
Other Capital Gifts and Grants	\$1,406,754	\$6,352	\$(1,400,402)	99.5%
Total Capital Gifts and Grants	\$1,406,754	\$591,923	\$(814,831)	57.9%
Total Revenues	\$146,398,548	\$183,157,940	\$36,759,392	25.1%

Source: Georgia Gwinnett College FY2022 Annual Financial Report

Expenses

Since 2021, GGC's expenses have grown by 4.9%, or \$7,539,672. Instruction accounted for about 32.6% of total expenses for the 2022 fiscal year. A little more than one fifth (\$33,581,038) of the budget was allocated for scholarships and fellowships. Public service expenses increased by 126.8%, the highest percentage increase in costs, despite a \$217,494 increase. The highest percentage drop was in research, where expenses were reduced by 28.4%, or \$120,075. Institutional support accounted for 13.4% of costs, however from FY21, it has seen the biggest financial shift attributable to a \$6,249,582 reduction in costs by FY22.

Source	June 2021	June 2022	Change	% Change
Instruction	\$58,806,651	\$53,154,559	\$(5,652,092)	9.6%
Research	\$422,712	\$302,637	\$(120,075)	28.4%
Public Service	\$171,532	\$389,026	\$217,494	126.8%
Academic Support	\$10,327,203	\$11,648,232	\$1,321,029	12.8%
Student Services	\$11,074,267	\$11,177,608	\$103,341	0.9%
Institutional Support	\$28,060,579	\$21,810,997	\$(6,249,582)	22.3%
Plant Operations and Maintenance	\$7,620,880	\$9,653,161	\$2,032,281	26.7%
Scholarships and Fellowships	\$18,720,133	\$33,581,038	\$14,860,905	79.4%
Auxiliary Enterprises	\$12,004,961	\$13,682,187	\$1,677,226	14.0%
Total Operating Expenses	\$147,208,918	\$155,399,445	\$8,190,527	5.6%
Interest Expense	\$8,245,359	\$7,594,504	\$(650,855)	7.9%
Total Nonoperating Expenses	\$8,245,359	\$7,594,504	\$(650,855)	7.9%
Total Expenses	\$155,454,277	\$162,993,949	\$7,539,672	4.9%

Source: Georgia Gwinnett College FY2022 Annual Financial Report

Additional Funding and Resources

Currently, grants, donations, and state financing are examples of the funding sources used by GGC. Along with tuition and fees, the College also receives funding from the GGC Foundation and other sources. The Georgia Gwinnett College Foundation's goals and objectives are to support Georgia Gwinnett College's education, research, public service, and community programs through volunteer leadership and guidance in advancement and sponsorships operations, fiduciary care for the foundation's resources for long-term betterment, and the provision of broad recommendation, consultation, and assistance to the President of the College.¹¹

College students who matched the criteria outlined by the U.S. Department of Education were eligible for financial aid under the Federal Coronavirus Aid, Relief, and Economic Security Act (CARES Act), which took effect in April 2020. Georgia Gwinnett College's approval and agreement to receive \$13,570,330 in

¹¹ About the Foundation - GGC Foundation, 2018

7. COLLEGE BUDGET AND CAPITAL NEEDS

funding under the CARES Act were both prepared and submitted. GGC used at least half of the total reward (\$6,735,165) to assist students whose financial circumstances were impacted.

GGC received additional financing in December 2020 from the Higher Education Emergency Relief II (HEERF II) funding under the Coronavirus Response and Relief Supplemental Appropriates Act of 2021. In June 2021, GGC was granted \$21,194,446 in HEERF III financing. These funds are available to students who incur "emergency costs that develop due to coronavirus." According to GGC, HEERF II and III funds were distributed first to students who exhibited "exceptional need" utilizing information from a student's financial assistance application.¹²

¹² Georgia Gwinnett College - Public Health, 2022