

Feasibility and Viability Analysis:

Master of Public Administration (MPA)

[Redacted Institution]

Submission by:



Center for Research and Strategy

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I. Program Overview

UPCEA University is examining its established Master of Public Administration (MPA) program with the ultimate goal of developing a dynamic, progressive, and transformative degree that enables graduates to drive change in the social sector and is recognized as an elite program within the global marketplace. There have been only six enrollments since 2017, in part due to suboptimal marketing efforts. The program currently requires 45 credits for completion and shares a number of required courses with the University's Master of Business Administration (MBA) program. The program is offered in a hybrid format with in-class time and a robust online component. The institution would like to examine its curriculum to ensure what is being taught in the classroom meets the needs of the workforce and is aligned with best practices in the field.

II. Objective

UPCEA University has requested the University Professional and Continuing Education Association (UPCEA) and its Center for Research and Strategy to provide information concerning the current market for a Master of Public Administration program. The University would like greater information on the market and its size, avenues of differentiation, a better understanding of potential students and their motivations, the delivery of the program, as well as the competitive environment.

The goal of this feasibility and viability analysis is to answer the following questions:

- What is the condition of the market for a Master of Public Administration degree and how it is delivered?
- Is there information available that could impact content development or course offerings?
- Who are potential students and what are their motivations and goals?
- What is the size, magnitude, delivery method, and cost of the competition?
- How should the University differentiate itself from competitors?

A feasibility and viability analysis is a cost-efficient and insightful exploratory research method regarding program assessment, design, and delivery – an internal stakeholder engagement and planning adaptation enabler.

III. Methodology

UPCEA and its Center for Research and Strategy conducted a feasibility and viability analysis that included a review of public administration trends, occupational demographics, and internet and library scans. UPCEA also conducted a survey of potential students. In total, 2,129 individuals participated in the potential student survey, 114 of whom met all of the qualifications of the research. This report presents occupational and demographic information at three levels: the San Francisco-Berkeley-Oakland MSA which includes San Francisco, Alameda, San Mateo, Contra Costa, and Marin counties in California as the primary region; California as the secondary region; and the contiguous states (OR, AZ, and NV) as the tertiary region.

IV. Key Findings

Occupational Analysis

The occupational analysis is a useful exercise to explore potential career path trajectories of students to better understand the marketplace they will encounter upon graduation. UPCEA examined five select occupations to highlight the current and forecasted occupational landscape for individuals who would benefit from UPCEA University's MPA program. Occupations were selected based upon their relevance to an MPA program though they should not be viewed as an exhaustive list. Select occupations are forecasted to see positive growth from 2019 to 2029. Employers with the greatest number of unique job postings were in a variety of industries including healthcare, education, and government, which indicates a diverse population of professionals and potential students. Job postings that include the keywords "MPA" or "Master of Public Administration" and mention a master's degree are referred to as select job postings.

- **Select occupations are forecasted to grow from 2019 to 2029 by a weighted average of 13% in the primary and secondary region, and 18% in the tertiary region.**
- **Between May 2019 and April 2020 there were 25,895 unique job postings that mentioned either "MPA" or "Master of Public Administration" in the San Francisco MSA, of which 6,509 (25%) mentioned master's degrees.**
- The posting intensity ratio in San Francisco for select job postings (6:1) was slightly higher than the regional average for all job postings (5:1), suggesting **companies are putting in slightly above average effort to hire for these select job postings.** The same trend was also seen in California.
- Select job postings were limited to include only those that mentioned a master's degree. However, approximately three-quarters of job postings in each region also mentioned a bachelor's degree in addition to a master's degree.
- For all three regions, **program managers (management) had the most unique postings.** Other common job titles include project managers (management), psychologists (life, physical, and social science), resource managers (life, physical, and social science), and vice presidents.
- **Kaiser Permanente and Anthem Inc. had the largest number of unique postings in San Francisco and California.** Other common employers include the University of California, San Mateo County Community College, California State University, County of Santa Clara, and County of San Mateo.
- In the secondary region, **Los Angeles (3,335) had the most unique postings for select job postings,** followed by San Francisco (2,349), and Oakland (1,332).

- **In San Francisco, employers were most often looking for hard skills in strategic planning (20%), accounting (19%), and budgeting (18%).** There is some variation between some of the hard skills employers are looking for and the skills that the workforce highlights in its online résumés and profiles.

Competitive Analysis

The competitive analysis is critical for understanding how UPCEA University's current and future MPA programming fits within the competitive market landscape, both in California and in the surrounding region. Overall, public administration master's degree completions in the state have been decreasing since 2014 and decreasing among contiguous states since 2013. Relevant master's degree completions for distance offerings have decreased within the San Francisco MSA but have increased statewide and in the contiguous states.

- **Relevant master's program completions in San Francisco have increased since 2015.** Master's degrees accounted for 282 of the 284 completions (99.3%) in 2018 in San Francisco.
- UPCEA examined nine potential competitors in California, as well as 12 national competitors. Seven of the nine in-state competitors offer their program online while all 12 national competitors do so.
- **The average total tuition for programs in California is \$37,216 for in-state students.** For the 12 national competitors, the average tuition for California residents is \$43,750. Both average tuitions were well below UPCEA University's cost of \$56,475. **Only three of the 21 profiled competitors have a tuition greater than UPCEA University's.**
- Among the 21 competitors, all offer public organization management, budgeting and finance, and public policy analysis courses.
- Overall, course offerings are fairly consistent among all competing institutions. The national competitors are slightly less likely to include leadership and ethics courses, as well as economics for public policy courses.

Potential Student Survey Analysis & Estimated Market Size

In order to gain a more precise understanding of UPCEA University's target markets, UPCEA conducted a survey of potential students. While the program concept was attractive to potential students, the University suffered from a lack of awareness.

- A total of 2,129 potential students were surveyed with 114 meeting the final requirement of interest in pursuing an MPA. The main reason for interest in graduate school was that obtaining a master's degree was a personal or life goal (35%). **The main motivation for considering an MPA program was to advance their career (33%),** followed by improving their skills or bettering themselves (26%), and the desire to make a difference (11%).
- **An online component proved to be appealing for an MPA program delivery.** Nearly two thirds of potential students (36% extremely interested, 27% very interested) would be interested in an MPA that is delivered fully online, rather than hybrid (23% extremely interested, 36% very interested) or face-to-face (14% extremely interested, 14% very interested) offerings.
- Among core curriculum topics, **strategic planning had the highest percentage of potential students (65%) saying it was very important,** followed by community engagement (61%), and budget and financial analysis (57%). Among elective courses, managing through crisis and uncertainty had the highest number of potential students (63%) saying it was very important, followed by diversity, equity, and inclusion (57%), and transformative leadership (47%).
- Approximately three-quarters (**76%**) said a focus on transformative, system-level change, through **an emphasis on sustainability, social justice, and other environmental and social issues, would increase their interest level in the MPA program.**
- Among select specializations, **a focus on environmental sustainability had the highest percentage of those who were extremely or very interested (78%),** followed by a focus on climate change (77%), and social justice/equity (76%). However, all specializations measured were viewed positively by potential students, each receiving a minimum of 70% extremely or very interested.
- **The level of awareness of schools that offer an MPA in the three specified regions varied widely.** A quarter (24%) of San Francisco respondents were aware of a school that offered an MPA program in their region, as were a third (35%) of California respondents, and over half (55%) of contiguous states respondents. Most commonly named schools were various California State University schools (21%). **There was no mention of UPCEA University.**

- Participants were asked to give their impressions of MPA programs among institutions in California. **University F had the highest percentage who said the MPA program was very reputable or somewhat reputable (83%),** followed by the University A (73%), and University B (73%). **UPCEA University ranked second to last and suffered from a lack of awareness as 45% of all participants were unaware,** including 41% from San Francisco. **Additionally, of those who were aware of UPCEA University’s MPA program, 30% said it was not very or not at all reputable, the highest of any institution.**
- Upon completing an MPA program, slightly more than half of respondents (52%) **plan to search for a job working for local, state, or federal government.** Other popular responses include individuals planning to become more civically active (40%) and planning to work in corporate public affairs or corporate social responsibility policy (29%).
- When asked what effect UPCEA University’s offering the MPA program fully online or in a low residency format would have on interest level, **67% said it would greatly increase or increase their interest in the program.** Two-thirds (67%) also said a UPCEA University offering the MPA program with a social justice and sustainability focus would increase their interest.
- UPCEA estimates UPCEA University **could enroll between 5 and 18 students during the initial years of the program, with a best guess around 9.** This will depend on many factors, including how the program is marketed, the delivery of the program, the development of stackable certificates, the potential specializations within the program, the success and failures of competing institutions, and price of the program, among others. Additionally, as the program matures and builds credibility it will likely benefit from word of mouth and other organic forms of marketing, which would likely increase enrollments at minimal expense. The University’s use of the [redacted] and connecting with [redacted] should further increase the visibility of the program, and subsequent enrollments. It is also important to note that the estimated market size only includes the three regions of interest employed throughout this research. UPCEA University has expressed interest in targeting major metropolitan areas such as Chicago, New York, Portland, and Seattle, among others, which could further increase enrollments beyond the estimated forecasts. Communicating the value of the program and the unique qualities of UPCEA University will be essential in achieving the “best guess” or exceeding the estimated enrollments. **Having a clear marketing strategy will be critical should the institution proceed with a program launch.**

V. Recommendations

The following recommendations were shaped by the data generated by a review of the occupational and competitive marketplace, an analysis of the potential student survey, and an understanding of the current and projected trends within the public administration field. Recommendations are included to help aid program development and add value to the program and should not be considered definitive or absolute. Recommendations are not listed by priority or importance.

- **Launch an Online Version of the MPA if the Program can be Successful with 8 to 15 Students.** The program is not expected to draw large numbers initially and will be marketing dependent. Having a clear strategic marketing plan that positions the program appropriately that leverages the appropriate marketing tools will be critical, especially given the current premier price point. A fully online program will maximize the market reach of the proposed degree. UPCEA's experience with other graduate degrees show that low residency or hybrid programs are best suited for either niche programs for institutions with high brand equity, otherwise, the geographic market area may be significantly reduced.
- **Improve Brand Recognition and Strength Through Strategic Marketing Efforts:** UPCEA University currently suffers from a lack of brand recognition within the local, state, and contiguous states markets. When asked about the reputation of MPA providers in California, 45% of all participants were unaware of UPCEA University's program, including 41% from San Francisco. Additionally, of those who were aware of UPCEA University's MPA program, 30% said it was not very or not at all reputable, the highest of any institution. However, the MPA program itself is appealing to potential students as two-thirds (67%) said a focus on transformative, system-level change, through an emphasis on sustainability, social justice, and other environmental and social issues, would increase their interest level in the MPA program. The program concept is attractive to students; the University just needs to elevate its brand recognition to match the quality of the program. UPCEA University should continue serving the existing market but improve the marketing approach and positioning. Competing just on the unique focus of the program alone is likely to be unsustainable in the long run as competitors may replicate the market position and potentially outmaneuver UPCEA University.
- **Explore Additional Avenues to Improve Brand Recognition and Awareness:** In addition to current and future marketing efforts, the University should explore additional avenues to improve brand recognition and awareness. It could hold webinars on current topics or trends, such as how public administrators are adapting to the current events unfolding around Covid-19. It could conduct question and answer sessions with powerful alumni or influential public figures in the San Francisco MSA or California. Having connections or guidance from leaders and professionals or through an advisory committee may also be merited.

- **Critically Consider Reducing Current Price Point:** UPCEA University should critically consider reducing the current cost associated with the MPA program to better align with the market. UPCEA University's current listed tuition of \$56,475 is nearly \$20,000 more than the \$37,216 in-state average of competing California institutions (excluding UPCEA University) and is higher than all but three of the 21 competing programs profiled in this research. Survey respondents in San Francisco identified the University A, with a program cost of \$45,220, as the most reputable MPA program, which indicates a lower price point would not necessarily be seen as lower quality. Furthermore, there has been a decrease in master's level completions in public administration in California and contiguous states since 2014, meaning the same number of institutions are pursuing a shrinking pool of potential students. If UPCEA University were to lower its price, it would likely become more competitive within the local and state markets due to the appeal of the unique nature of its programming. Should UPCEA University not lower the price, then the institution **MUST** do an effective job communicating value.
- **Emphasize and Expand Stackable Program:** Regardless of whether the University decides to implement a fully online delivery of its MPA programming, it should emphasize and expand its stackable programming. UPCEA University currently offers four certificates that can count as credit toward the MPA program. UPCEA University should highlight these certificates in marketing materials and look to expand into other sustainable and societal topic areas. The certificates should allow the institution to attract students who want to advance their education but are not ready to make the financial and time commitment associated with an MPA program. Additionally, it would allow students who are enrolled in the program but are unable to complete their studies a natural off-ramp to leave the program but still have a UPCEA University credential to show to employers. The certificates should be marketed as a product line extension of the greater MPA program.
- **Consider Adding a Fully Online Delivery to Supplement Current Programming:** While some potential students see value in UPCEA University's current hybrid delivery format, it should consider adding an online delivery of its MPA program to supplement current offerings. Nearly two thirds of potential students (36% extremely interested, 27% very interested) would be interested in an MPA that is delivered fully online, more than hybrid (23% extremely interested, 36% very interested) or face-to-face (14% extremely interested, 14% very interested) offerings. In order to attract those from all corners of the state, and potentially attract students from neighboring states, UPCEA University will need to offer a fully online MPA program.

As noted in the first recommendation bullet, hybrid or low residency can reduce the geographic target market. Strong institutional brands for programs where there are few substitutes or competitors can be successful in a low-residency or hybrid format, but many others may fail as a result of low enrollments. Low residency programs, those that meet a few times or less a year, can be popular and successful models, but often require the student to absorb significant additional costs. Hybrid programs, those that may meet

more regularly, tend to draw from a geography similar to a campus-based or face-to-face program with the exception that students may travel from slightly farther distances.

- **Conduct Annual Surveys with Current Students to Better Understand their Demographics, Evaluate Program Quality and Measure Faculty Performance:** UPCEA University should consider conducting annual surveys with current students to evaluate program quality and faculty performance, as well as to better understand who the students are and how they might differ from other MPA students. This would allow the institution to measure performance and program quality through a consistent scale over time. This is particularly relevant given the fact that the program has only received six enrollments since 2017. Additionally, these evaluations and discussions with students could be used to further improve the program. Information will be critical in the early stages of this program.

VI. Trends in Public Administration

Evolving Political Climate

The political landscape is always changing, and public administrators must be able to adapt. They are in charge of managing government resources and must allocate them appropriately depending on the economic and political climate. For example, four months ago the American economy was strong, with unemployment at 3.5% in February 2020. Two months later, due to the COVID-19 pandemic, it soared to 14.7%.¹ The global coronavirus crisis has taken center stage in politics. Popular topics such as the China-U.S trade war, tensions between Iran and the United States, Brexit, the Russian Federation and Ukraine, Syria, Afghanistan, Iraq, North Korea nuclear proliferation, and the internal politics of the United States have all disappeared from news headlines.² Due to this changing environment, public administrators must find a way to properly react and allocate resources.

Public Health Policy Changes

Public administration is tasked with the responsibility to decide on the best actions to safeguard public health. During the COVID19 pandemic, public officials have been making decision after decision to protect the American people from the virus. Situations like these cause governments to constantly be changing how they manage their healthcare systems. For example, occupational safety laws, minimum wage standards, professional licensing of health providers, and the creation of the CDC were all made to improve public health. All of these decisions and organizations were created by public administrators through the development of policies and regulations. More policies and regulations will be needed after the coronavirus pandemic to address various healthcare issues that occurred during this time. For example, the American Cancer Society in April 2020 reported that 27% of patients in active cancer treatment saw their care interrupted, while 13% said care was delayed with no indication when it would begin again.³ And it's not just cancer patients; others needing serious medical treatment are experiencing delays due to the pandemic. Public administration will need to address this issue after the pandemic to ensure that this doesn't occur again.

Grassroots Advocacy

Due to changes in mobile technology, people are more connected than ever. They are able to communicate quickly and easily to influence political decisions. Elections and even political revolutions have been started through advocacy efforts. One post on social media has the power to mobilize millions of people and inspire them to take action on critical social issues. Now more than ever, people have access to information that countries have hidden in the past. These include environmental issues, human rights abuses, and international accords. Many associations have formed to impact the political landscape. An example of these associations is the American Society of Anesthesiologists (ASA) which has transformed grassroots advocates, individuals who are willing to reach out to members of Congress, and made them into grassroots advocates,

¹ <https://www.ncsl.org/research/labor-and-employment/national-employment-monthly-update.aspx>

² https://www.sc.edu/uofsc/posts/2020/04/covid_impact_on_politics_barbieri.php#.Xs1BrVnKgcg

³ <https://buffalonews.com/2020/05/26/long-term-future-after-coronavirus-presents-challenges-opportunities/>

individuals who have built personal relationships with their representatives in Congress.⁴ The ASA is just one of many examples of how grassroots advocacy is prominent within the current political landscape.

Sustainability

Sustainability is impacting the country in a variety of different ways. Public administrators are making decisions that include protecting natural resources, utilizing renewable energy sources, and minimizing opportunities for government corruption. They must find a way to properly meet the need of the public while not compromising the future of the next generation. This involves creating new policies and organizations to safeguard the health of our natural resources and planet. For example, President Theodore Roosevelt's administration recognized the need to protect natural resources and established policies to accomplish that task. Startling statistics are released every year that prove more action is needed by public administrators. For example, nine out of 10 people worldwide breathe polluted air, around 7 million people die from pollution every year, an estimated one third of all food produced globally is either lost or wasted, and the food wasted by the United States and Europe alone could feed the world three times over.⁵ Due to the current waste of natural resources, much change is needed to occur within public administration to address these issues. This will be a trend that will continue for many years to come.

Changing Technology

The ever-changing field of technology is having a significant impact on how public organizations communicate with their constituencies. With increased capabilities due to technology, public administrators have more resources at hand to increase the efficiency of their work. They are able to analyze mass amounts of data at a faster rate, have learning seminars from colleagues across the globe, and institute procedures that streamline operations. Due to automation, personnel are able to accomplish tasks in less time. Also, online access has allowed for work to be done remotely. This is evident in the COVID19 world, as public administrators are making decisions from their homes that are affecting the overall public. However, misuse of technology can also produce the opposite effect as well. According to the Bureau of Labor Statistics, technology that helps employees do their job better increases expectations and their workload. Overloading employees with too much work can result in a 68% decrease in productivity.⁶ It is important for public administration officials to utilize technology correctly to increase efficiency rather than see it decline.

⁴ <https://www.quorum.us/best-practices/examples-effective-grassroots-advocacy-campaigns/282/>

⁵ <https://www.aventri.com/blog/56-sustainability-statistics-planners-need-to-know>

⁶ <https://www.business2community.com/human-resources/how-technology-improves-workplace-productivity-02166853>

VII. Occupational Analysis

For the purpose of this research, five occupations were selected to highlight the current and forecasted occupational marketplace for individuals who would benefit from UPCEA University's MPA program. These are social and community service managers, management analysts, legislators, budget analysts, and public relations and fundraising managers. Occupations were selected based upon their relevance to an MPA program and the current and potential specializations within the UPCEA University's MPA program. While these are not the only occupations that could benefit from the program, they do provide valuable insight into the overall market while demonstrating potential career paths for graduates of the program.

Job postings

This report presents occupational and demographic information at three levels; San Francisco-Berkeley-Oakland MSA – which includes San Francisco, Alameda, San Mateo, Contra Costa, and Marin counties in California – as the primary region; California as the secondary region; and the contiguous states (OR, AZ, and NV) as the tertiary region. All of the following data is taken from Economic Modeling Specialists International (Emsi) from the 2020.2 data set.

Primary Region – San Francisco MSA

Table 1 highlights the projected future demand for the select occupations in the primary region. From 2019 to 2029 they are forecasted to experience 13% growth or 6,555 jobs and 5,549 annual openings.

Table 1: Forecasted Demand for Select Occupations in the Primary Region

Occupations	Jobs		Change		Median Annual Earnings	Annual Openings
	2019	2029	#	%		
Legislators	352	381	29	8%	\$70,032	31
Public Relations and Fundraising Managers	2,326	2,545	219	9%	\$133,037	231
Social and Community Service Managers	6,917	7,854	937	14%	\$63,992	744
Management Analysts	38,939	44,230	5,291	14%	\$103,033	4,466
Budget Analysts	848	927	79	9%	\$96,439	78
Total/Average	49,382	55,937	6,555	13%	\$93,306	5,549

Figure 1 details job postings in the San Francisco MSA from May 2019 to April 2020 that include “MPA” or “Master of Public Administration” in the job posting. During that time, there were nearly 26,000 unique job postings.

Figure 1: Job Postings in the Primary Region That Include Select Keywords

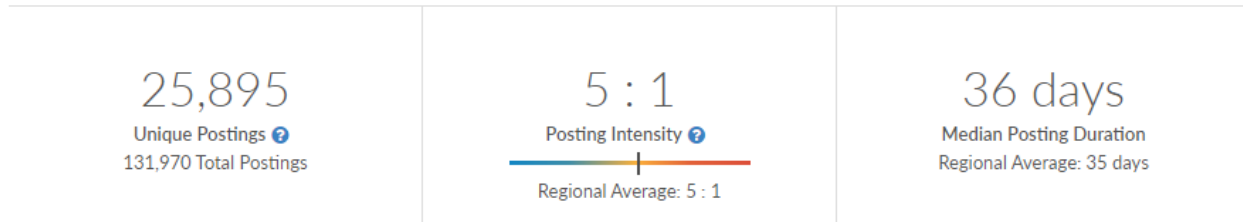


Figure 2 details job postings in the San Francisco MSA from May 2019 to April 2020 that include “MPA” or “master of public administration” in the job posting and mention a master’s degree. Among the 25,895 job postings that include the select keywords 6,509 mention a master’s degree, or 25% of unique postings. These 6,509 unique postings will be referred to as “select job postings” for the remainder of this section.

Figure 2: Job Postings in the Primary Region That Mention Select Keywords & Master’s Degree

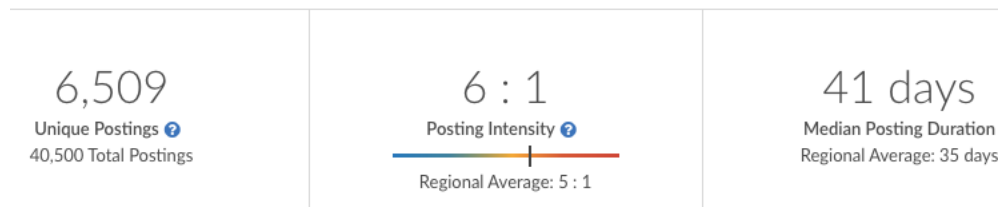


Figure 3 on the following page lists the top 10 cities in the primary region for select job postings from April 2019 to April 2020. San Francisco had the highest number of unique job postings (2,349), followed by Oakland (1,332). The cities of Walnut Creek and Pleasanton tied for having the highest posting intensity of 10:1.

Figure 3: Top Cities in the Primary Region for Select Job Postings

City	Total/Unique (May 2019 - Apr 2020)	Posting Intensity	Median Posting Duration
San Francisco, CA	13,078 / 2,349	6 : 1	41 days
Oakland, CA	9,587 / 1,332	7 : 1	53 days
Berkeley, CA	1,488 / 338	4 : 1	37 days
San Mateo, CA	1,466 / 296	5 : 1	40 days
Redwood City, CA	2,018 / 270	7 : 1	42 days
Fremont, CA	863 / 122	7 : 1	37 days
Walnut Creek, CA	1,196 / 117	10 : 1	39 days
Pleasanton, CA	1,145 / 115	10 : 1	54 days
Martinez, CA	485 / 105	5 : 1	34 days
Alameda, CA	355 / 103	3 : 1	28 days

Figure 4 highlights the top companies in the primary region for select job postings from April 2019 to April 2020. Kaiser Permanente had the highest number of unique postings (1,035), followed by the University of California (539). Kaiser Permanente had the highest posting intensity (15:1).

Figure 4: Top Companies in the Primary Region for Select Job Postings

Company	Total/Unique (May 2019 - Apr 2020)	Posting Intensity	Median Posting Duration
Kaiser Permanente	15,580 / 1,035	15 : 1	61 days
University of California	2,084 / 539	4 : 1	42 days
San Mateo County Community College District	228 / 87	3 : 1	22 days
Mills College	337 / 76	4 : 1	56 days
Peralta Community College District	178 / 76	2 : 1	64 days
California State University	124 / 73	2 : 1	84 days
County of San Mateo	204 / 66	3 : 1	32 days
Ivy Exec	263 / 63	4 : 1	25 days
Robert Half International Inc.	360 / 58	6 : 1	44 days
Pricewaterhousecoopers LLP	773 / 58	13 : 1	64 days

Figure 5 lists the top job titles in job postings for select job postings from April 2019 to April 2020. Program managers (management) had the highest number of unique postings (162). Psychologists (life, physical, and social science) had the highest posting intensity, 24:1.

Figure 5: Top Job Titles in Select Job Postings in the Primary Region

Job Title	Total/Unique (May 2019 - Apr 2020)	Posting Intensity	Median Posting Duration
Program Managers (Management)	590 / 162	4 : 1	33 days
Psychologists (Life, Physical, and Social Science)	2,989 / 123	24 : 1	73 days
Project Managers (Management)	617 / 122	5 : 1	45 days
Executive Directors	430 / 101	4 : 1	42 days
Health Services Directors	544 / 97	6 : 1	55 days
Vice Presidents	481 / 93	5 : 1	48 days
Accountants	439 / 64	7 : 1	46 days
Directors of Student Services	192 / 61	3 : 1	40 days
Human Resources (HR) Managers (Management)	258 / 55	5 : 1	34 days
Assistant Directors (Management)	167 / 55	3 : 1	18 days

Figure 6 highlights any mention of education or experience levels listed in select job postings from April 2019 to May 2020 in the primary region that mention a master’s degree. Of those of which mention a master’s degree 74% also mentioned a bachelor’s degree and 11% a Ph.D. or professional degree. For minimum experience, 22% did not specify any experience level and 28% listed 2-3 years of experience.

Figure 6: Educational and Experience Breakdown for Select Job Postings in the Primary Region

Education Level ?	Unique Postings	% of Total	Minimum Experience ?	Unique Postings	% of Total
Unspecified	0	0%	No experience listed	1,430	22%
High school or GED	596	9%	0 - 1 Years	1,262	19%
Associate's degree	466	7%	2 - 3 Years	1,798	28%
Bachelor's degree	4,785	74%	4 - 6 Years	1,351	21%
Master's degree	6,509	100%	7 - 9 Years	359	6%
Ph.D. or professional degree	726	11%	10+ Years	309	5%

Figure 7 details the top hard skills among select job postings and workforce profiles in the primary region from April 2019 to May 2020. Skills are pulled directly from job postings while workforce profiles come from Emsi’s database of more than 100 million online résumés and profiles, each of which have been updated within the last three years.

Employers were most often looking for hard skills in strategic planning (20% of postings), accounting (19%), and budgeting (18%). There is some variation between some of the hard skills employers are looking for and the skills that the workforce highlights in its online résumés and profiles. Strategic planning, project management, and budgeting are the top three highest skills that appear in workforce profiles

Figure 7: Top Hard Skills for Select Job Postings in the Primary Region

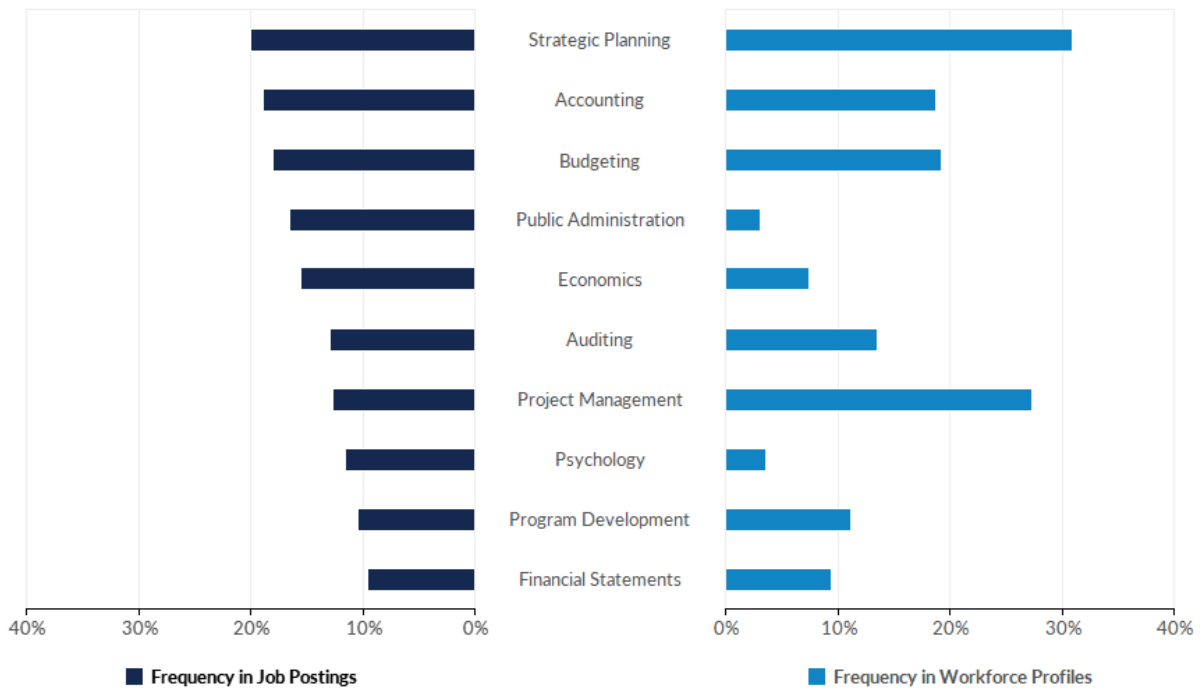


Table 2 shows the educational attainment for the select occupations. According to Emsi, this is only available at the national level. Assuming national education percentages are comparable in each of the regions of interest, the overall percentage of select professionals with a master’s degree will shift by region based upon the makeup of the labor market.

In the primary region from April 2019 to April 2020, there were 49,382 jobs in the select occupations. Applying the national master’s attainment level of 29.2%, there would have been 14,399 select occupation jobs held by individuals with a master’s degree. As a note, the total row at the bottom of Table 2 showcases the number of individuals at that education level and their subsequent percentage of the total number of jobs in 2019 for the selected occupations.

Table 2: Educational Attainment for Select Occupations in the Primary Region

Occupations	# of jobs (2019)	Education Level			
		Less than Bachelor's	Bachelor's Degree	Master's Degree	Doctoral or Professional Degree
Legislators	352	30.2%	40.1%	22.7%	7.1%
Public Relations and Fundraising Managers	2,326	11.5%	56.3%	28.4%	3.8%
Social and Community Service Managers	6,917	26.9%	38.1%	29.4%	5.6%
Management Analysts	38,939	22.1%	41.9%	29.2%	6.8%
Budget Analysts	848	26.1%	41.5%	30.0%	2.4%
Total	49,382	11,061	20,753	14,399	3,169
		22.4%	42.0%	29.2%	6.4%

Secondary Region - California

Table 3 highlights the projected future demand for the select occupations in the secondary region. From 2019 to 2029 they are forecasted to experience 13% growth or 33,062 jobs with 29,078 annual openings.

Table 3: Forecasted Demand for Select Occupations in the Secondary Region

Occupations	Jobs		Change		Median Annual Earnings	Annual Openings
	2019	2029	#	%		
Legislators	4,255	4,577	322	8%	\$53,744	371
Public Relations and Fundraising Managers	8,979	9,905	926	10%	\$126,734	902
Social and Community Service Managers	37,078	44,427	7,349	20%	\$62,513	4,324
Management Analysts	204,282	228,418	24,136	12%	\$85,216	22,865
Budget Analysts	7,209	7,540	331	5%	\$86,736	615
Total/Average	261,803	294,866	33,062	13%	\$82,989	29,078

Figure 8 details job postings in the secondary region from April 2019 to April 2020 that include either “MPA” or “Master of Public Administration” in the posting. Among the 419,289 total postings, 95,230 were unique, a posting intensity of 4:1, the same as the regional average. The median posting duration was 33 days, also the same as the regional average.

Figure 8: Job Postings in the Secondary Region That Include Select Keywords

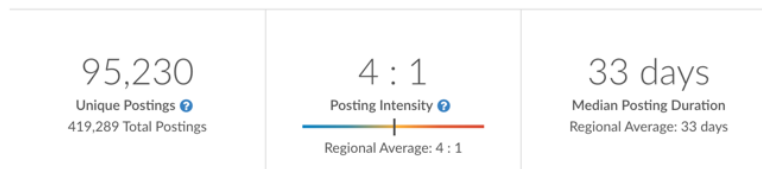


Figure 9 details job postings in the secondary region from April 2019 to May 2020 that mention master’s degrees and select keywords. Among the 95,230 unique job postings that include select keywords 27,826 unique postings also mentioned a master’s degree, or 29%. These 27,826 unique postings will be referred to as “select job postings” for the remainder of this section.

Figure 9: Job Postings in the Secondary Region that Mention Select Keywords & Master’s Degrees

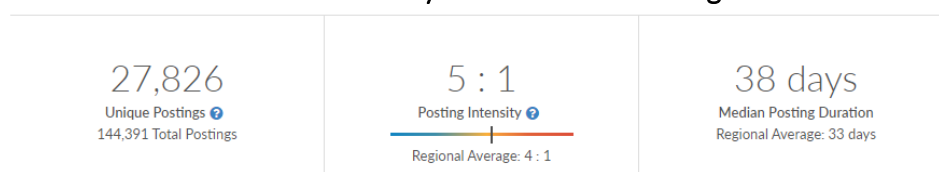


Figure 10 lists the top 10 cities in the secondary region among select job postings from April 2019 to May 2020. Los Angeles had the highest number of unique job postings (3,335), followed by San Francisco (2,349).

Figure 10: Top Cities in the Secondary Region for Select Job Postings

City	Total/Unique (May 2019 - Apr 2020)	Posting Intensity	Median Posting Duration
Los Angeles, CA	17,216 / 3,335	5 : 1	45 days
San Francisco, CA	13,078 / 2,349	6 : 1	41 days
Oakland, CA	9,587 / 1,332	7 : 1	53 days
San Diego, CA	7,103 / 1,316	5 : 1	36 days
Sacramento, CA	5,588 / 1,008	6 : 1	39 days
San Jose, CA	5,111 / 842	6 : 1	36 days
Irvine, CA	2,330 / 428	5 : 1	48 days
Riverside, CA	2,409 / 423	6 : 1	45 days
Fresno, CA	2,482 / 405	6 : 1	49 days
Merced, CA	1,427 / 390	4 : 1	29 days

Figure 11 highlights the top companies in the secondary region for select job postings from April 2019 to May 2020. Kaiser Permanente had the highest number of unique postings (2,274), followed by University of California (1,509), and California State University (574). Kaiser Permanente had the highest posting intensity (13:1).

Figure 11: Top Companies in the Secondary Region for Select Job Postings

Company	Total/Unique (May 2019 - Apr 2020)	Posting Intensity	Median Posting Duration
Kaiser Permanente	29,108 / 2,274	13 : 1	52 days
University of California	7,343 / 1,509	5 : 1	38 days
California State University	1,785 / 574	3 : 1	55 days
Robert Half International Inc.	1,428 / 276	5 : 1	31 days
University of Southern California	1,536 / 247	6 : 1	72 days
Anthem, Inc.	525 / 235	2 : 1	37 days
United States Department of the Navy	441 / 194	2 : 1	12 days
Sutter Health	855 / 186	5 : 1	43 days
County of Santa Clara	487 / 161	3 : 1	25 days
Ivy Exec	566 / 152	4 : 1	29 days

Figure 12 shows the top job titles for select job postings in the secondary region from April 2019 to May 2020. Program managers (management) had the highest number of unique postings (597), followed by vice presidents (440). Psychologists (life, physical, and social science) had the highest job posting ratio of 20:1.

Figure 12: Top Job Titles in Select Job Postings in the Secondary Region

Job Title	Total/Unique (May 2019 - Apr 2020)	Posting Intensity	Median Posting Duration
Program Managers (Management)	2,320 / 597	4 : 1	33 days
Vice Presidents	1,962 / 440	4 : 1	43 days
Project Managers (Management)	1,975 / 411	5 : 1	38 days
Psychologists (Life, Physical, and Social Science)	7,298 / 373	20 : 1	69 days
Health Services Directors	1,693 / 368	5 : 1	44 days
Executive Directors	1,296 / 357	4 : 1	38 days
Accountants	1,817 / 308	6 : 1	33 days
Directors of Student Services	1,042 / 241	4 : 1	35 days
Account Managers (Management)	1,077 / 218	5 : 1	36 days
Assistant Directors (Management)	702 / 214	3 : 1	32 days

Figure 13 highlights any mention of education or experience levels listed in select job postings from April 2019 to May 2020 in California. Of those that mention a master’s degree, 77% also mentioned a bachelor’s degree and 11% a Ph.D. or professional degree. For minimum experience, 27% listed 2-3 years of experience and 25% listed 0-1 years of experience.

Figure 13: Educational and Experience Breakdown for Select Job Postings in Secondary Region

Education Level	Unique Postings	% of Total	Minimum Experience	Unique Postings	% of Total
Unspecified	0	0%	No experience listed	5,313	19%
High school or GED	2,432	9%	0 - 1 Years	6,970	25%
Associate's degree	2,338	8%	2 - 3 Years	7,476	27%
Bachelor's degree	21,372	77%	4 - 6 Years	5,659	20%
Master's degree	27,826	100%	7 - 9 Years	1,253	5%
Ph.D. or professional degree	2,964	11%	10+ Years	1,155	4%

Figure 14 illustrates the top hard skills among select job postings and workforce profiles in the secondary region from April 2019 to May 2020. The hard skills most frequently listed in job postings were budgeting (20%) and public administration (19%). There is some variation between some of the hard skills employers are looking for and the skills that the workforce highlights in its online résumés and profiles. The skills with the largest disparities include strategic planning (17% of job postings and 32% of workforce profiles), project management (11% of postings and 24% of profiles), and public administration (19% of postings and 4% of profiles).

Figure 14: Top Hard Skills for Select Job Postings in the Secondary Region

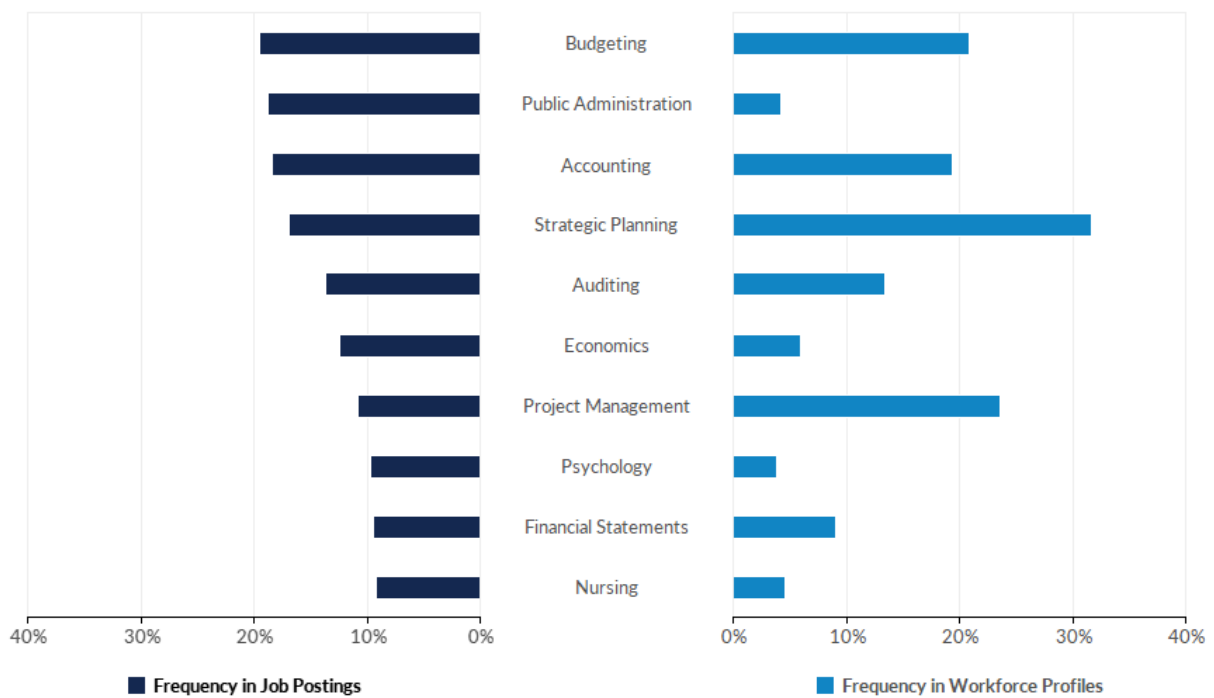


Table 4 shows the educational attainment for the select occupations. According to Emsi, educational attainment is only available at the national level. In the secondary region, there were 261,804 jobs in the select occupations. Applying the national master’s level of 29.1%, there would have been 76,230 (29.1%) select occupation jobs held by individuals with a master’s degree.

Table 4: Educational Attainment for Select Occupations in the Secondary Region

Occupations	# of jobs (2019)	Education Level			
		Less than Bachelor's	Bachelor's Degree	Master's Degree	Doctoral or Professional Degree
Legislators	4,255	30.2%	40.1%	22.7%	7.1%
Public Relations and Fundraising Managers	8,979	11.5%	56.30%	28.40%	3.80%
Social and Community Service Managers	37,078	26.9%	38.1%	29.4%	5.6%
Management Analysts	204,282	22.1%	41.9%	29.2%	6.8%
Budget Analysts	7,209	26.1%	41.5%	30.0%	2.4%
Total	261,803	59,319	109,474	76,230	16,784
		22.7%	41.8%	29.1%	6.4%

Tertiary Region – Contiguous States

Table 5 highlights the projected future demand for the select occupations in the tertiary region. From 2019 to 2029, they are forecasted to experience an average growth rate of 18% or 12,746 jobs with 8,334 annual openings.

Table 5: Forecasted Demand for Select Occupations in the Tertiary Region

Occupations	Jobs		Change		Median Annual Earnings	Annual Openings
	2019	2029	#	%		
Legislators	1,348	1,528	180	13%	\$39,543	129
Public Relations and Fundraising Managers	3,229	3,716	487	15%	\$90,234	347
Social and Community Service Managers	10,590	12,796	2,206	21%	\$59,512	1,256
Management Analysts	52,653	62,316	9,663	18%	\$75,893	6,402
Budget Analysts	2,165	2,376	211	10%	\$70,119	201
Total/Average	69,985	82,731	12,746	18%	\$73,197	8,334

Figure 15 details job postings in the tertiary region from April 2019 to April 2020 that mention either “MPA” or “Master of Public Administration” in the posting. Among the 144,129 postings, 28,759 were unique, a posting intensity of 5:1, equal to the regional average. The median posting duration was 32 days, slightly above the regional average.

Figure 15: Job Postings in the Tertiary Region That Mention Select Keywords

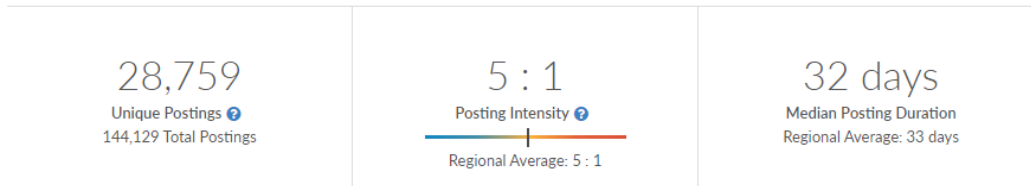


Figure 16 details job postings for the select occupations in the tertiary region from April 2019 to May 2020 that mention select keywords and a master’s degree. Among the 28,759 unique job postings that include select keywords 8,627 unique postings also mentioned a master’s degree, or 30%. These 8,627 unique postings will be referred to as “select job postings” for the remainder of this section.

Figure 16: Job Postings in the Tertiary Region That Mention Select Keywords and a Master’s Degree

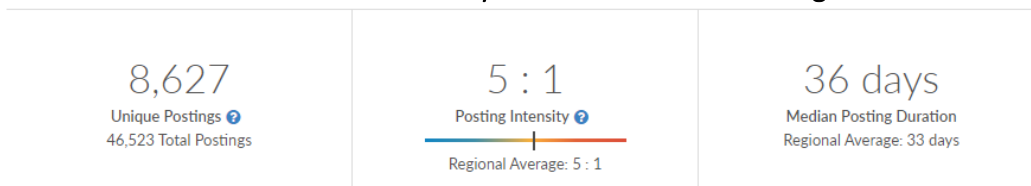


Figure 17 lists the top 10 cities in the tertiary region for select job postings from April 2019 to May 2020 that mention master’s degrees. Phoenix had the highest number of unique job postings (1,509). The city with the highest posting intensity was Portland, OR (7:1).

Figure 17: Top Cities in the Tertiary Region for Select Job Postings

City	Total/Unique (May 2019 - Apr 2020)	Posting Intensity	Median Posting Duration
Phoenix, AZ	7,868 / 1,509	5 : 1	33 days
Portland, OR	7,935 / 1,108	7 : 1	44 days
Tucson, AZ	3,647 / 625	6 : 1	42 days
Las Vegas, NV	3,090 / 505	6 : 1	41 days
Reno, NV	1,873 / 290	6 : 1	46 days
Eugene, OR	1,549 / 258	6 : 1	44 days
Salem, OR	993 / 253	4 : 1	28 days
Tempe, AZ	767 / 184	4 : 1	37 days
Chandler, AZ	647 / 127	5 : 1	42 days
Mesa, AZ	491 / 123	4 : 1	32 days

Figure 18 highlights the top companies in the tertiary region for select job postings from April 2019 to May 2020. Maricopacounty.com, LLC had the highest number of unique postings at 277. The Department of Veteran Affairs had the highest posting intensity of 11:1.

Figure 18: Top Companies in the Tertiary Region for Select Job Postings

Company	Total/Unique (May 2019 - Apr 2020)	Posting Intensity	Median Posting Duration
Maricopacounty.com, LLC	710 / 277	3 : 1	12 days
Department of Agriculture	700 / 269	3 : 1	67 days
University of Arizona	787 / 192	4 : 1	38 days
University of Oregon	788 / 137	6 : 1	74 days
Indian Health Service	1,134 / 117	10 : 1	45 days
Providence Health & Services	815 / 108	8 : 1	65 days
State of Arizona	228 / 101	2 : 1	16 days
State of Nevada	249 / 97	3 : 1	28 days
Department of Veterans Affairs	1,076 / 96	11 : 1	52 days
Grand Canyon University, Inc.	603 / 94	6 : 1	39 days

Figure 19 lists the top job titles among select job postings in the tertiary region from April 2019 to May 2020. Program managers (management) had the highest number of unique postings (186), followed by resource managers (life, physical, and social science) (164). Registered nurses had the highest posting intensity of 14:1.

Figure 19: Top Job Titles in the Tertiary Region for Select Job Postings

Job Title	Total/Unique (May 2019 - Apr 2020)	Posting Intensity	Median Posting Duration
Program Managers (Management)	837 / 186	5 : 1	33 days
Resource Managers (Life, Physical, and Social Science)	483 / 164	3 : 1	67 days
Vice Presidents	648 / 115	6 : 1	41 days
Executive Directors	471 / 108	4 : 1	34 days
Registered Nurses	1,558 / 108	14 : 1	51 days
Project Managers (Management)	585 / 107	5 : 1	46 days
Accountants	368 / 92	4 : 1	37 days
School Principals	277 / 88	3 : 1	29 days
Financial Analysts	794 / 88	9 : 1	45 days
Civil Engineers	238 / 82	3 : 1	39 days

Figure 20 highlights any mention of education or experience levels listed in select job postings from April 2019 to May 2020 in the tertiary region. Of those of which mention a master’s degree 75% also mentioned a bachelor’s degree and 11% a Ph.D. or professional degree. For minimum experience, 32% require 0-1 years and 28% listed 2-3 years of experience.

Figure 20: Educational and Experience Breakdown for Select Job Postings in Tertiary Region

Education Level	Unique Postings	% of Total	Minimum Experience	Unique Postings	% of Total
Unspecified	0	0%	No experience listed	1,301	15%
High school or GED	852	10%	0 - 1 Years	2,736	32%
Associate’s degree	929	11%	2 - 3 Years	2,435	28%
Bachelor’s degree	6,435	75%	4 - 6 Years	1,591	18%
Master’s degree	8,627	100%	7 - 9 Years	315	4%
Ph.D. or professional degree	989	11%	10+ Years	249	3%

Figure 21 illustrates the top hard skills among select job postings and workforce profiles in the tertiary region from April 2019 to May 2020. Accounting (19%), budgeting (18%), and public administration (17%) were the most frequently listed hard skills in job postings. There is some variation between some of the hard skills employers are looking for and the skills that the workforce highlights in its online resumés and profiles. The skills with the largest disparities were public administration (17% of job postings and 5% of workforce profiles), strategic planning (16% of postings and 36% of profiles), and public relations (10% of postings and 24% of profiles).

Figure 21: Top Hard Skills for Select Job Postings in the Tertiary Region

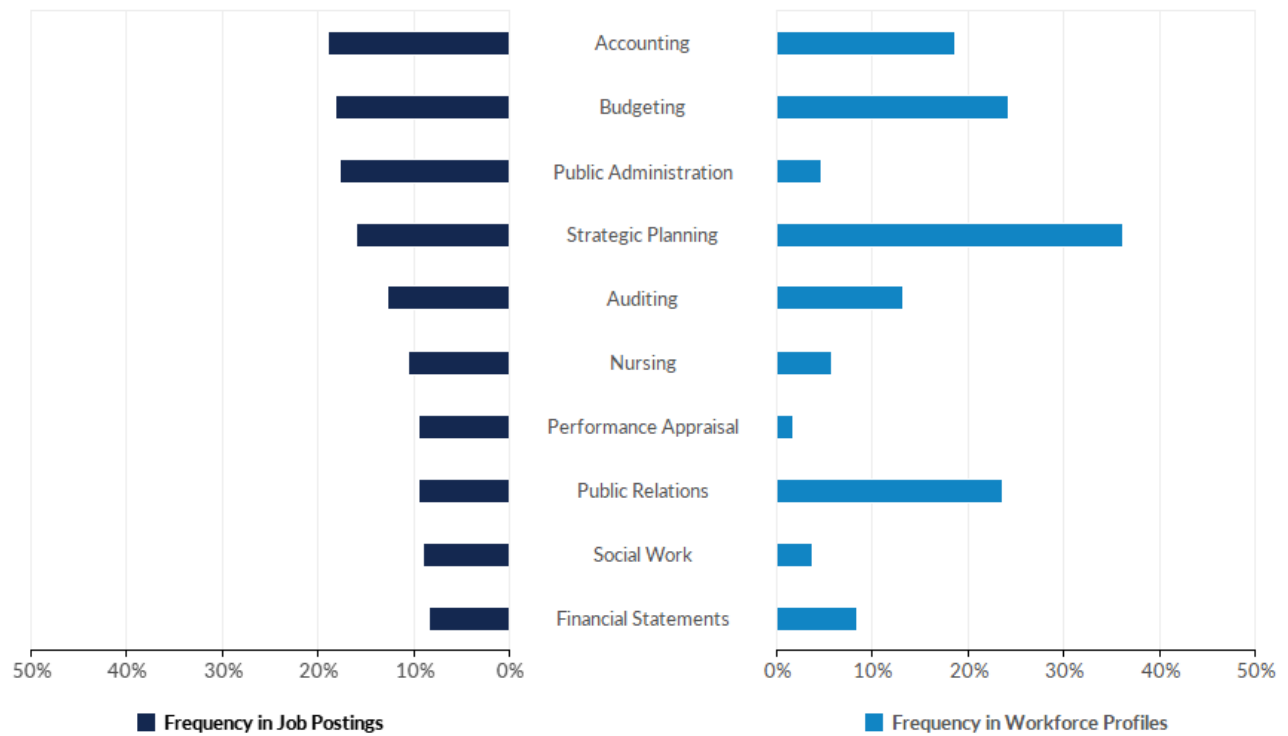


Table 6 shows the educational attainment for the select occupations in the tertiary region. According to Emsi, educational attainment is only available at the national level. In the tertiary region in 2019, there were 69,985 jobs in the select occupations. Applying the national master’s attainment level of 29.2%. there would have been 20,361 (29.1%) select occupation jobs held by individuals with a master’s degree.

Table 6: Educational Attainment for Select Occupations in the Tertiary Region

Occupations	# of jobs (2019)	Education Level			
		Less than Bachelor's	Bachelor's Degree	Master's Degree	Doctoral or Professional Degree
Legislators	1,348	30.2%	40.1%	22.7%	7.1%
Public Relations and Fundraising Managers	3,229	11.5%	56.3%	28.4%	3.8%
Social and Community Service Managers	10,590	26.9%	38.1%	29.4%	5.6%
Management Analysts	52,653	22.1%	41.9%	29.2%	6.8%
Budget Analysts	2,165	26.1%	41.5%	30.0%	2.4%
Total	69,985	15,829	29,353	20,361	4,444
		22.6%	41.9%	29.1%	6.4%

VIII. Competitive Analysis

The programs featured in the following competitive analysis do not constitute an exhaustive list of competitors, but rather provide an overall representation of the current marketplace. Because tuition costs are often estimated and routinely do not include additional fees, the tuition prices should be used more as guidelines rather than definitive bounds. For programs that do not post a set total tuition, either a per-credit rate or annual rate was used to calculate the tuition for a full-time student. Additional information on each competing program is available in Appendix I.

UPCEA examined public administration programs (CIP code 44.0401) to understand potential market demand. For the purpose of this research, distance-offered program completions are defined as “a program for which all the required coursework is able to be completed via distance education courses. All completions of this program are considered distance-offered completions, even if some students chose not to enroll in distance education courses.”⁷ This means that if there are 10 distance-offered completions, and four of these were completed online and six completed on campus, all 10 would be counted as distance-offered completions. Completion data is taken directly from the Integrated Postsecondary Education Data System (IPEDS) database published by the U.S. Department of Education’s National Center for Education Statistics and is presented for the San Francisco MSA, California, and the contiguous states (OR, AZ and NV).

⁷ <https://www.economicmodeling.com/2017/11/20/emsi-introduces-data-related-distance-offered-academic-programs/>

Figure 22 charts the number of public administration (CIP 44.0401) program completions among all credential levels from 2003 to 2018 in the San Francisco MSA. IPEDS began tracking both distance and non-distance completions in 2012. From 2012 to 2018, distance-offered completions decreased by 53% while non-distance offered programs increased by 96.6%, resulting in an overall completion increase of 10.5%.

Figure 22: Relevant Program Completions Over Time in the San Francisco MSA

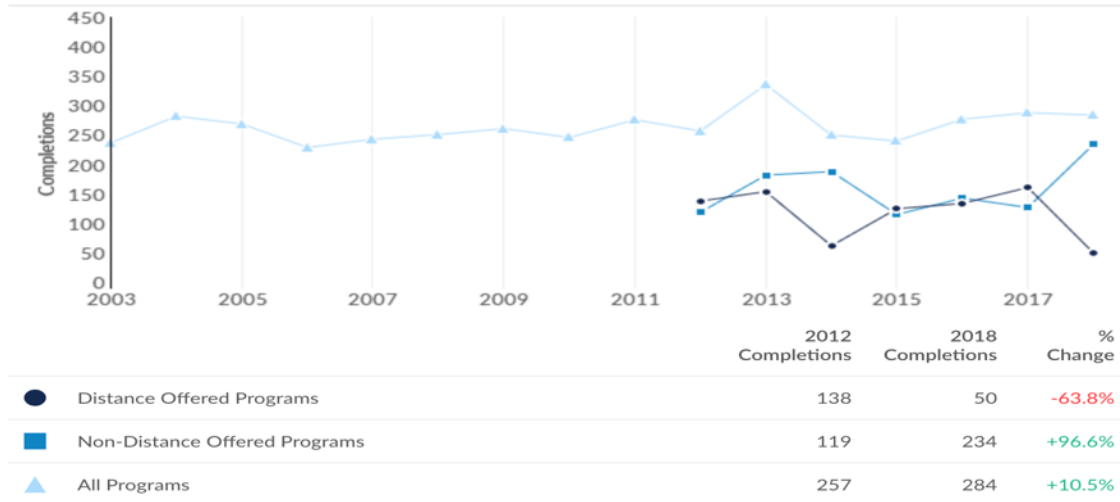


Figure 23 charts the number of public administration (CIP 44.0401) program completions among all credential levels from 2003 to 2018 in California. From 2012 to 2018, distance-offered completions increased by 35.5% while non-distance offered programs decreased by 36%, resulting in an overall completion decrease of 12.7%.

Figure 23: Relevant Program Completions Over Time in California

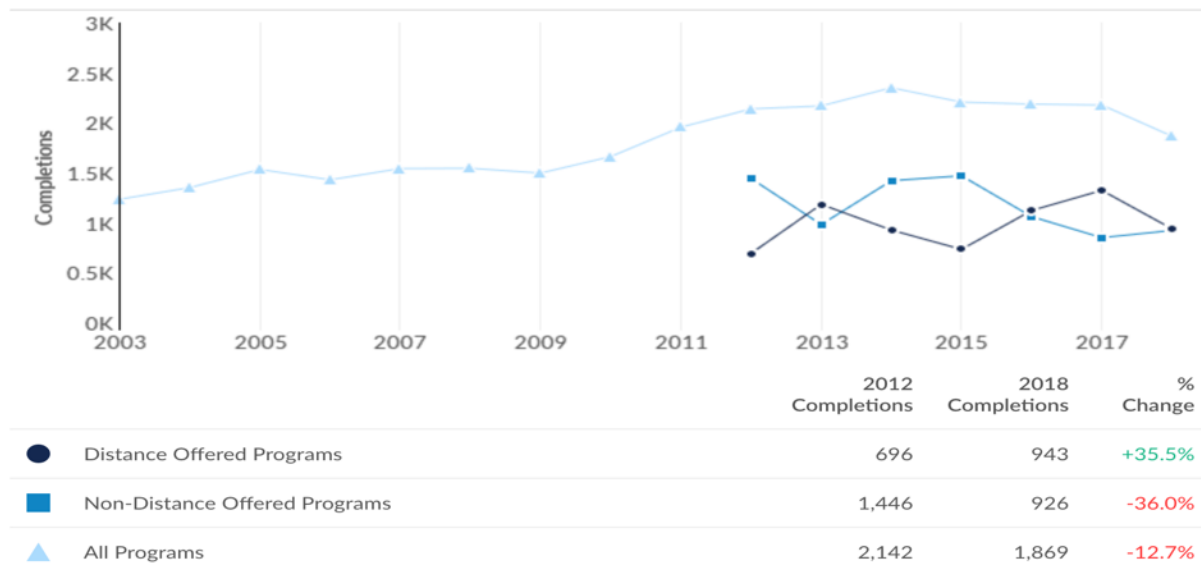


Figure 24 charts the number of public administration (CIP 44.0401) program completions among all credential levels from 2003 to 2018 in the contiguous states. From 2012 to 2018, distance-offered completions increased by 8.6%, and non-distance offered programs decreased by 40%, resulting in an overall decrease of 16.8%.

Figure 24: Relevant Program Completions Over Time in the Contiguous States

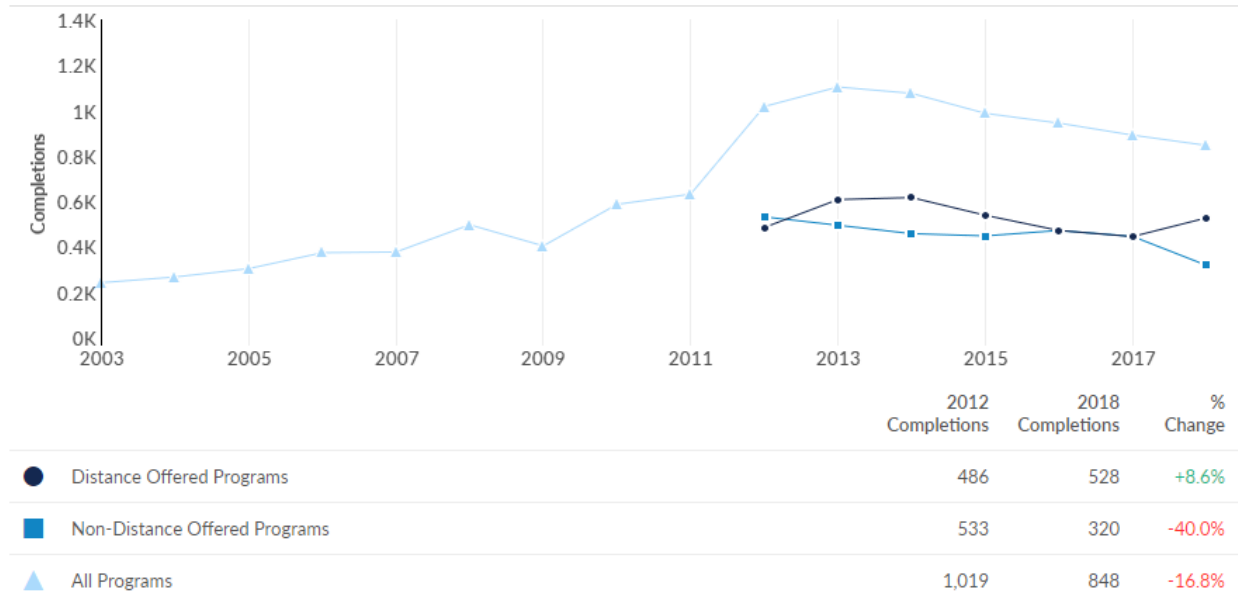


Figure 25 displays the award level of completions in 2018 in the San Francisco MSA. Master’s degrees accounted for 282 of the 284 completions (99.3%).

Figure 25: Relevant Program Completions by Award Level in 2018 in the San Francisco MSA

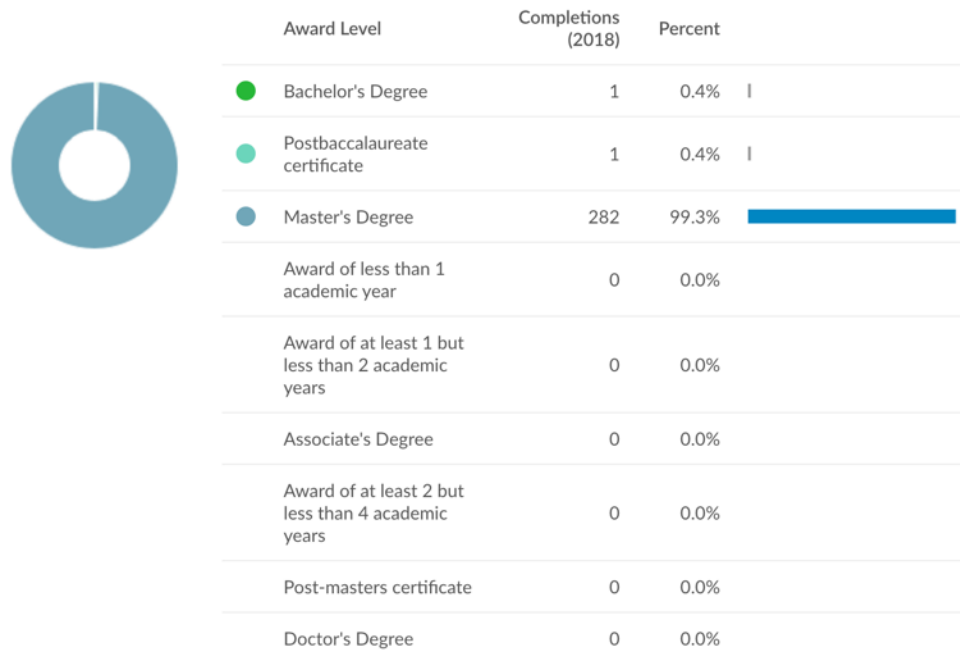


Figure 26 displays the award level of completions in 2018 in California. Master’s degrees accounted for 1,454 of the 1,869 completions (77.8%).

Figure 26: Relevant Program Completions by Award Level in 2018 in the California Region

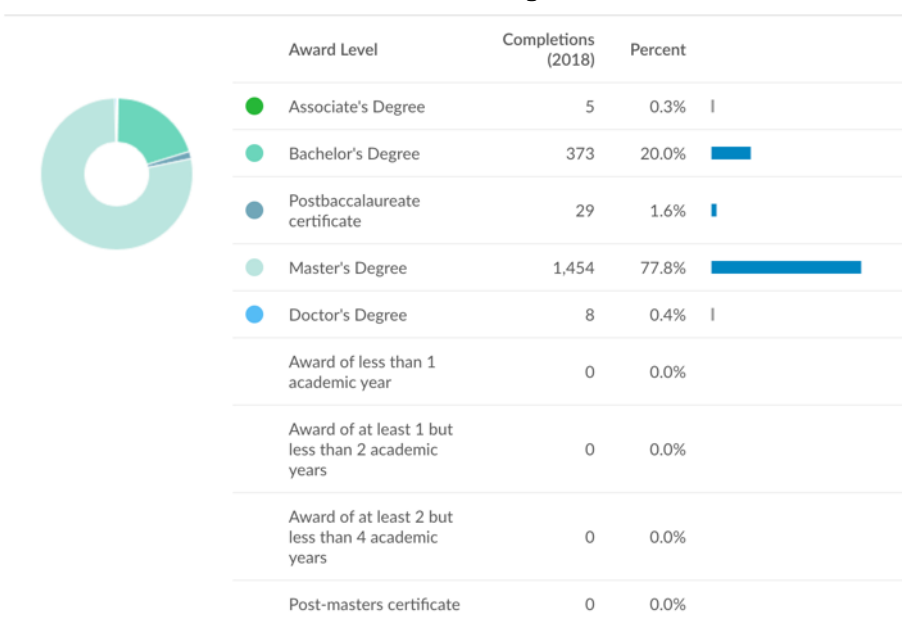


Figure 27 displays the award level of completions in 2018 in the contiguous states. Master’s degrees accounted for 585 completions out of 848 completions (69.0%).

Figure 27: Relevant Program Completions by Award Level in 2018 in the Contiguous States



Figure 28 shows the number of relevant program master’s degree completions from 2008 to 2018 in the San Francisco MSA. Since 2015, these have increased.

Figure 28: Relevant Program Master’s degree Completions Over Time in the San Francisco MSA

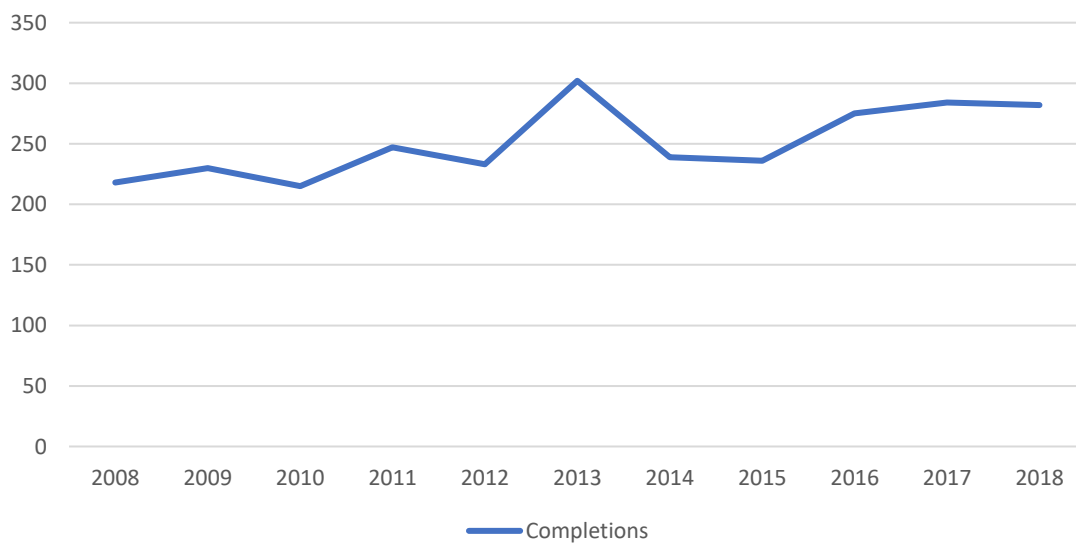


Figure 29 shows the number of relevant program master’s degree completions from 2008 to 2018 in California. There has been an increase in completions from 2008 to 2014, with a peak of 1,920 in 2014. After 2014, completions began to decrease, to 1,454 in 2018.

Figure 29: Relevant Program Master’s Degree Completions Over Time in California

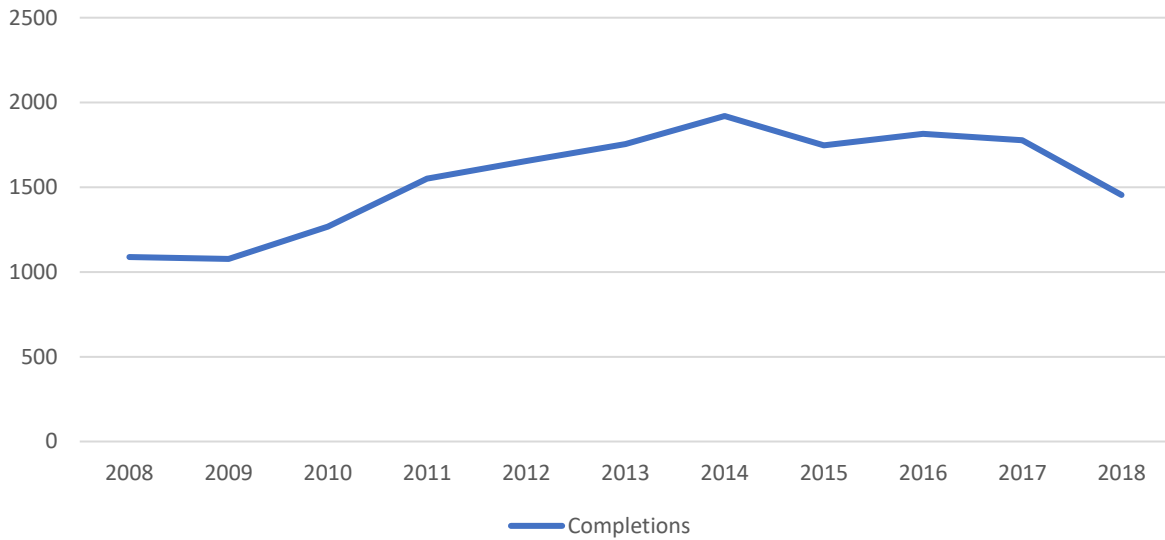


Figure 30 shows the number of relevant program master’s degree completions from 2008 to 2018 in the contiguous states. Between 2011 to 2014, there was a sharp increase in completions, with a peak of 746 in 2014. Since then, there has been a gradual decrease, falling to 585 completions in 2018.

Figure 30: Relevant Program Master’s Degree Completions Over Time in the Contiguous States

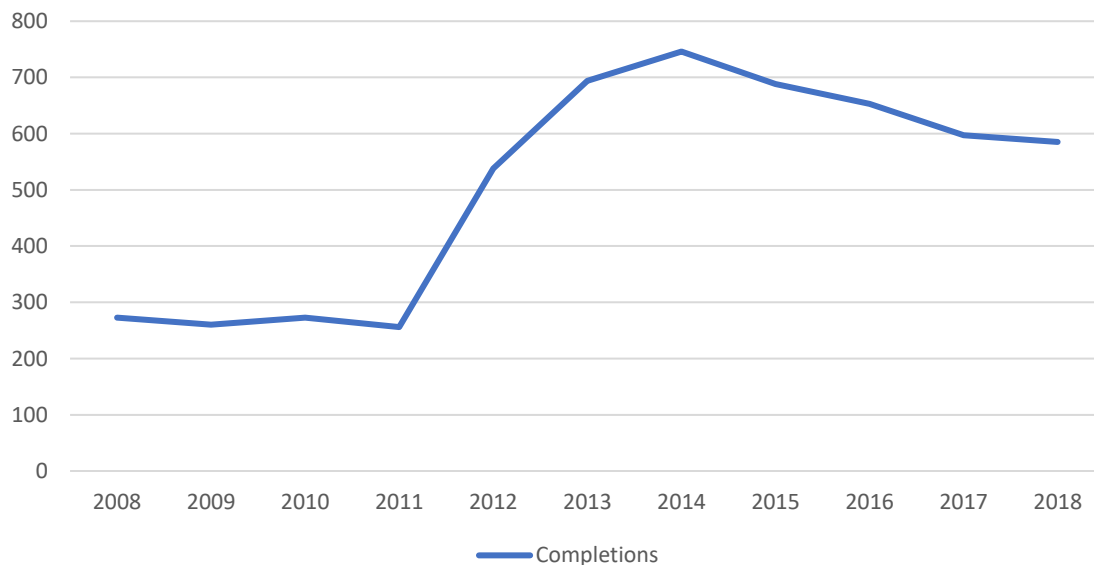


Table 7 lists nine institutions in California that offer an MPA program, along with UPCEA University’s MPA program. The average total tuition for in-state students among the featured programs, excluding UPCEA University, is \$37,216, and \$38,994 for out-of-state students. Tuition ranges from University C’s \$19,774 for 30 credits (fewest credits) to the University F’s \$75,560 for 40 credits (most credits). Among profiled competing institutions, only the University D and University F have a higher price point than that of UPCEA University’s MPA program for in-state students (\$56,475).

Table 7: Potential Competitors in California

Institution	Location	Program Name	Delivery	Length	Total Tuition	
					In-State	Out-of-State
UPCEA University	San Francisco, CA	MPA Program	Online & On Campus	45 credits	\$56,475	
University A	San Francisco, CA	MPA Program	On Campus	38 credits	\$45,220	
University B	San Francisco, CA	MPA Program	Online & On Campus	39-42 credits	\$23,000	\$39,000
University C	Sacramento, CA	MPA Program	On Campus	30 credits	\$19,774	
University D	Berkeley, CA	MPA Program	Online & On Campus	30 credits	\$62,072	
University E	Northridge, CA	MPA Program	Online & On Campus	36 credits	\$26,568	
University F	Los Angeles, CA	MPA Program	Online & On Campus	40 credits (41 for pre-service students)	\$75,560	
University G	La Verne, CA	MPA Program	Online & On Campus	39 credits	\$31,200	
University H	Riverside, CA	MPA Program	Online	36 credits	\$21,852	
University I	San Francisco, CA	Executive MPA Program	Online & On Campus	36 credits	\$29,700	

Table 8 highlights 12 national institutions that offer an MPA program through an online delivery along with UPCEA University’s MPA program. The University Q has the highest tuition, \$75,600. The lowest tuition is \$11,089 for in-state students at University of Central University R. Excluding UPCEA University’s program, the average tuition for California residents is \$43,750, which is below the tuition of UPCEA University’s MPA program.

Table 8: Potential Competitors in the United States

Institution	Location	Program Name	Delivery	Length	Total Tuition	
					In-State	Out-of-State
UPCEA University	San Francisco, CA	MPA Program	Online & On Campus	45 credits	\$56,475	
University J	Chapel Hill, NC	MPA Program	Online & On Campus	45 credits	\$54,405	
University K	Washington, D.C.	MA in Public Management	Online & On Campus	36 credits	\$50,808	
University L	Chicago, IL	MPPA Program	Online & On Campus	13 courses	\$45,760	
University M	Villanova, PA	MPA Program	Online	36 credits	\$33,300	
University N	College Station, TX	Executive Master of Public Service and Administration Program	Online	39 credits	\$25,818	\$45,362
University O	Columbus, OH	Master of Public Administration and Leadership	Online	32-33 credits	\$25,620	\$25,645
University P	Clemson, SC	MPA Program	Online	39 or 42 credits	\$31,824-\$34,272	
University Q	Miami, FL	MPA Program	Online	36 credits	\$75,600	
University R	Miami, FL	MPA Program	Online	42 credits	\$15,958	\$21,840
University S	Poughkeepsie, NY	MPA Program	Online & On Campus	39-42 credits	\$34,320-\$36,960	
University T	Washington D.C	Online Master of Public Administration and Policy	Online	36 credits	\$65,232	
University U	Orlando, FL	MPA Program	Online or On Campus	30 credits	\$11,089	\$35,820

Table 9 shows a curriculum heat map of topics offered by the nine identified competing programs in California. The table examines only the general MPA program of each institution and does not include potential specializations or tracks. The topics chosen may not match the exact program name, but if a differently named course consists of work similar to a selected topic, the box will be marked.

The most popular topics are public organization management, budgeting and finance, and public policy analysis. Economics in public policy, strategic communications, and leadership and ethics are the least popular topics. The topic selection consists of popular subjects covered by UPCEA University’s MPA program.

Table 9: California Competition Curriculum Heat Map

University Name	Course Offerings						
	Economics for Public Policy	Budgeting and Finance	Data and Numerical Analysis	Strategic Communications	Public Organization Management	Public Policy Analysis	Leadership and Ethics
UPCEA University							
University A							
University B							
University C							
University D							
University E							
University F							
University G							
University H							
University I							

Key: Comprehensive curriculum: Related or partial curriculum: No offering:

Table 10 is a curriculum heat map of topics offered by the 12 national online programs. The table examines only the general MPA program of each institution and does not include potential specializations or tracks. All include public policy analysis, budgeting and finance and public organization management. The least popular courses are leadership and ethic and economic public policy, of which four and six universities respectively did not include offerings in those topics.

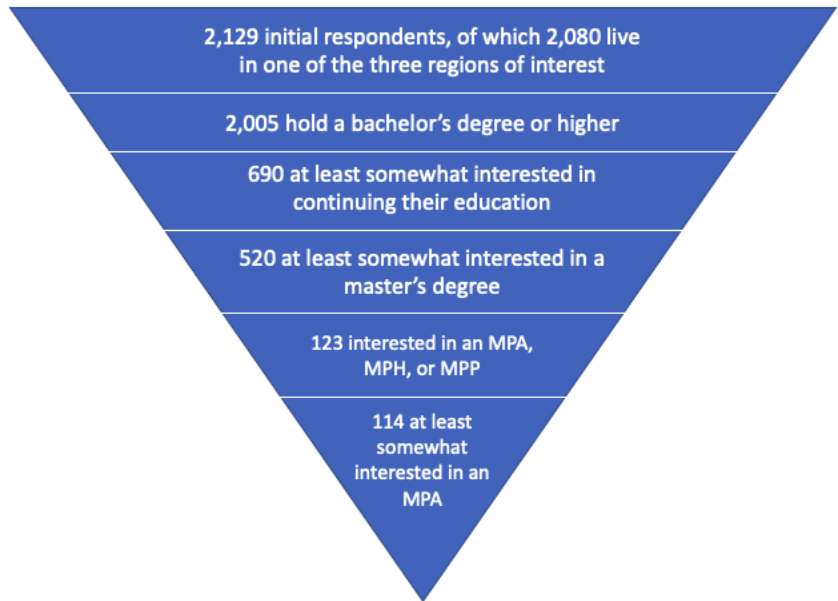
Table 10: National Competition Curriculum Heat Map

University Name	Course Offerings						
	Economics for Public Policy	Budgeting and Finance	Data and Numerical Analysis	Strategic Communications	Public Organization Management	Public Policy Analysis	Leadership and Ethics
UPCEA University	Green	Green	Green	Yellow	Yellow	Green	Green
University J	Red	Green	Yellow	Green	Green	Green	Green
University K	Green	Green	Green	Yellow	Green	Green	Red
University L	Green	Green	Green	Yellow	Green	Green	Green
University M	Red	Green	Green	Yellow	Green	Green	Green
University N	Green	Green	Green	Yellow	Green	Green	Green
University O	Red	Green	Green	Yellow	Green	Green	Yellow
University P	Red	Green	Green	Yellow	Green	Green	Red
University Q	Red	Green	Red	Green	Green	Green	Red
University R	Green	Green	Green	Yellow	Green	Green	Yellow
University S	Yellow	Yellow	Green	Yellow	Green	Yellow	Green
University T	Green	Green	Green	Yellow	Green	Green	Yellow
University U	Red	Green	Green	Yellow	Green	Green	Red

Key: Comprehensive curriculum: Related or partial curriculum: No offering:

IX. Potential Student Survey Analysis

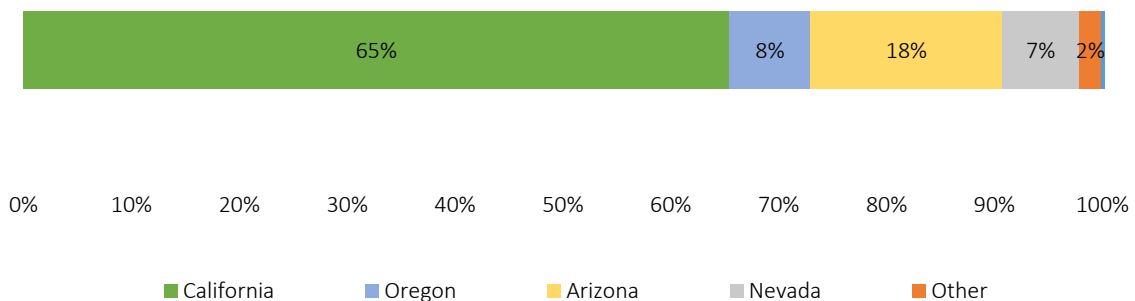
In order to gain a more precise understanding of UPCEA University’s target markets, UPCEA conducted a survey of potential students. Individuals qualified if they lived in San Francisco, California, Oregon, Nevada or Arizona, had achieved a bachelor’s degree or higher, were at least somewhat interested in continuing their education, somewhat interested in a master’s degree, interested in either a public administration, public policy, or public health program, and somewhat interested in an MPA. In total, 114 individuals of the initial 2,129 respondents met all of the parameters of the research.



Qualifying Questions

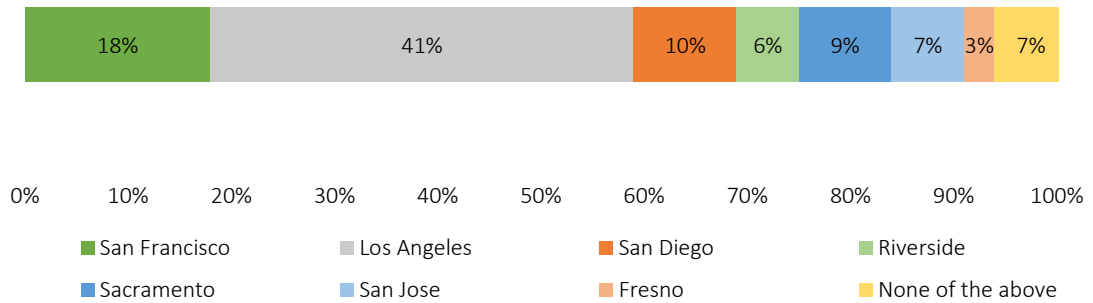
Approximately two-thirds (65%) of participants reside in California. Those not from California, Oregon, Arizona, or Nevada were terminated from the study.

Figure 31: State of Residence (n=2,129)



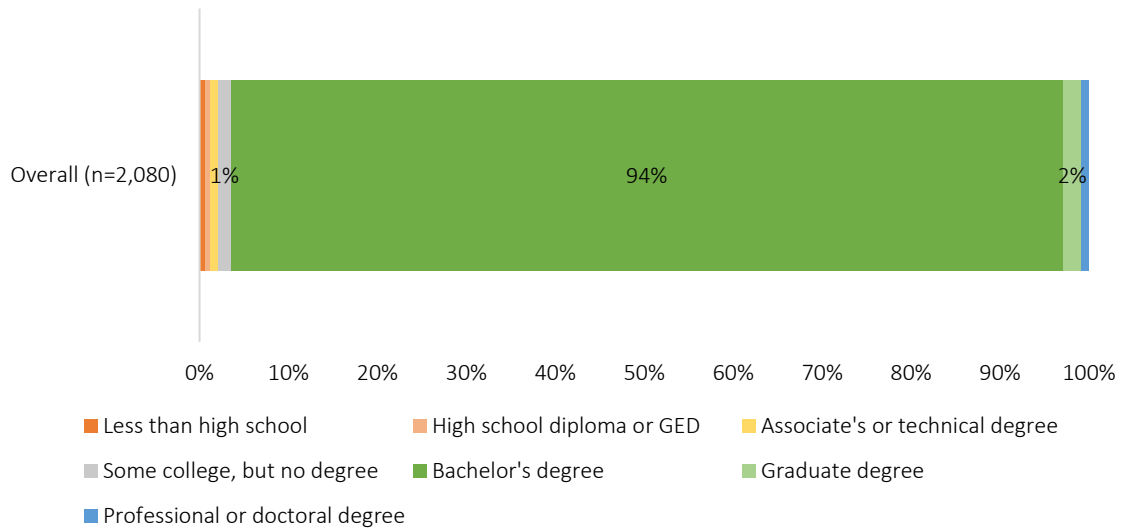
Respondents who reside in California were then asked if they lived near a major metropolitan area. Nearly one-fifth (18%) live in San Francisco.

Figure 32: California Residents (n=1,389)



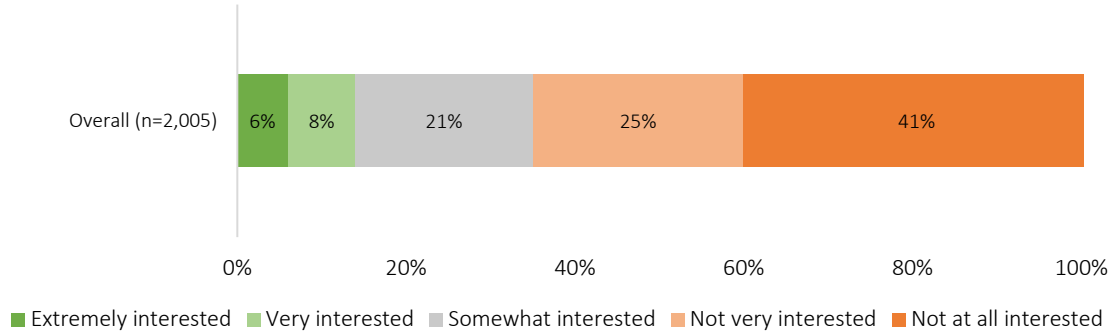
A total of 97% of respondents have a bachelor’s degree or higher. Respondents who do not were terminated from the study.

Figure 33: Highest Level of Education Completed



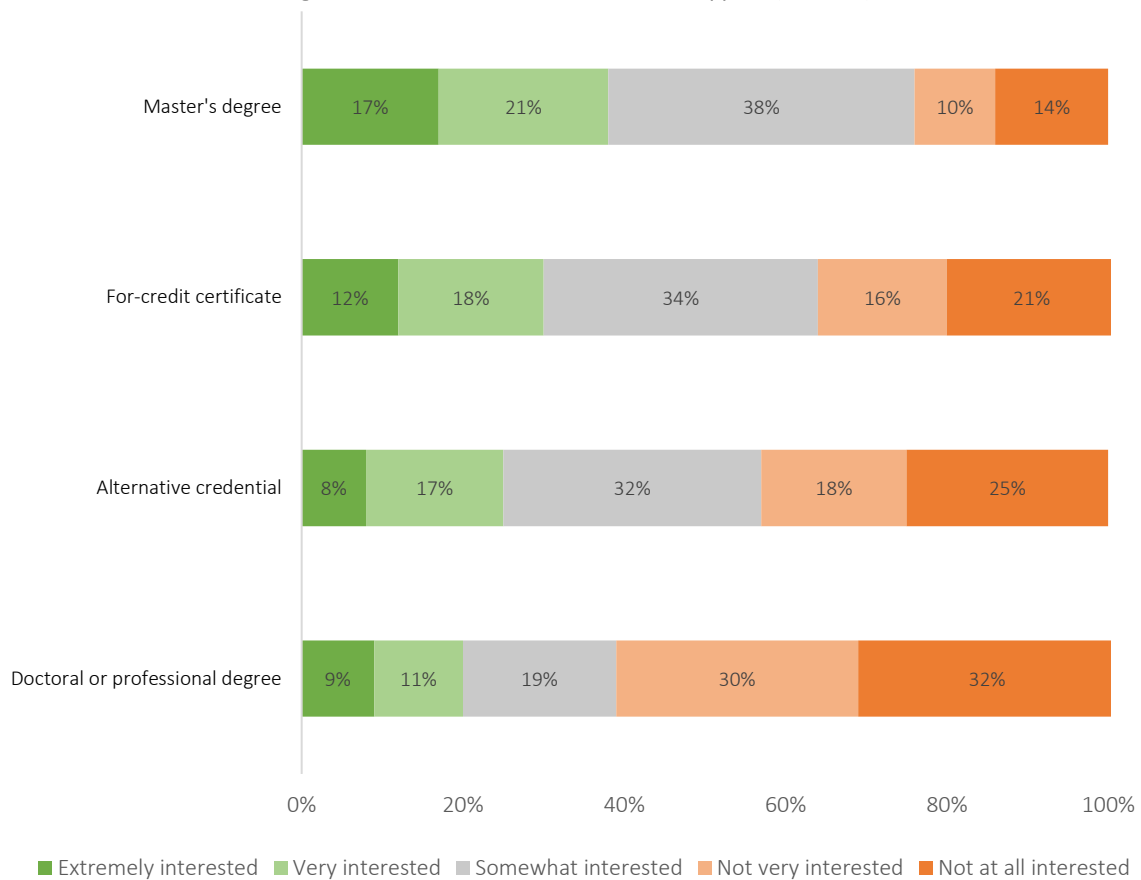
Among those who met the education requirements, 35% were at least somewhat interested in continuing their education. Those who were not at least somewhat interested in continuing their education were terminated from the study.

Figure 34: Interest in Continuing Education



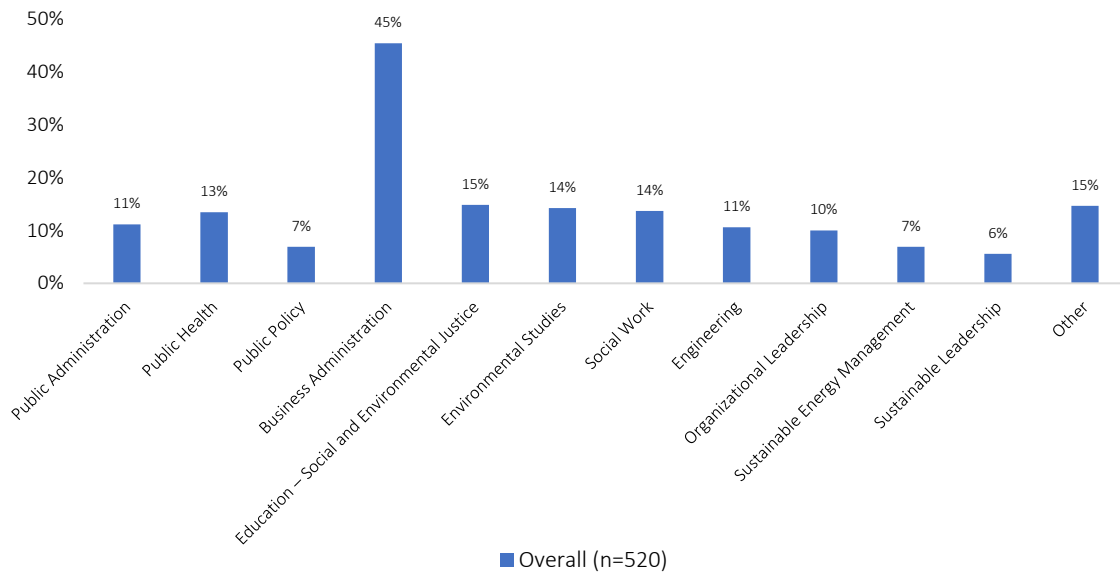
Qualified respondents were asked to gauge their interest in various credential types. Overall, respondents had the highest interest in a master’s degree (76% at least somewhat interested). Respondents who were not at least somewhat interested in a master’s degree were terminated from the study.

Figure 35: Interest in Credential Types (n=690)



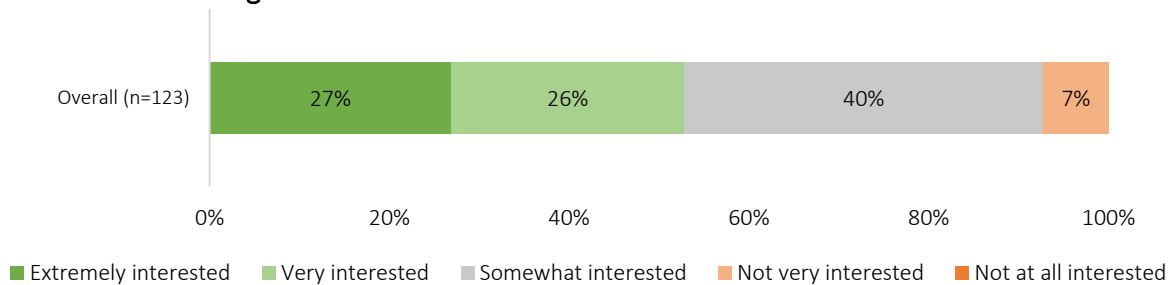
Respondents who met the previous geographic, educational, and interest qualifications were asked if they had interest in a variety of master’s degree topics. A Master of Business Administration overwhelmingly received the highest interest among respondents. Eleven percent of respondents had interest in a Master of Public Administration. Respondents who did not have interest in a Master of Public Administration, Master of Public Health, or Master of Public Policy program were terminated from the study.

Figure 36: Interest in Various Master’s Degree Topics



Among respondents who met the previous qualifications of the study, 93% were at least somewhat interested in an MPA. Those who were not were terminated.

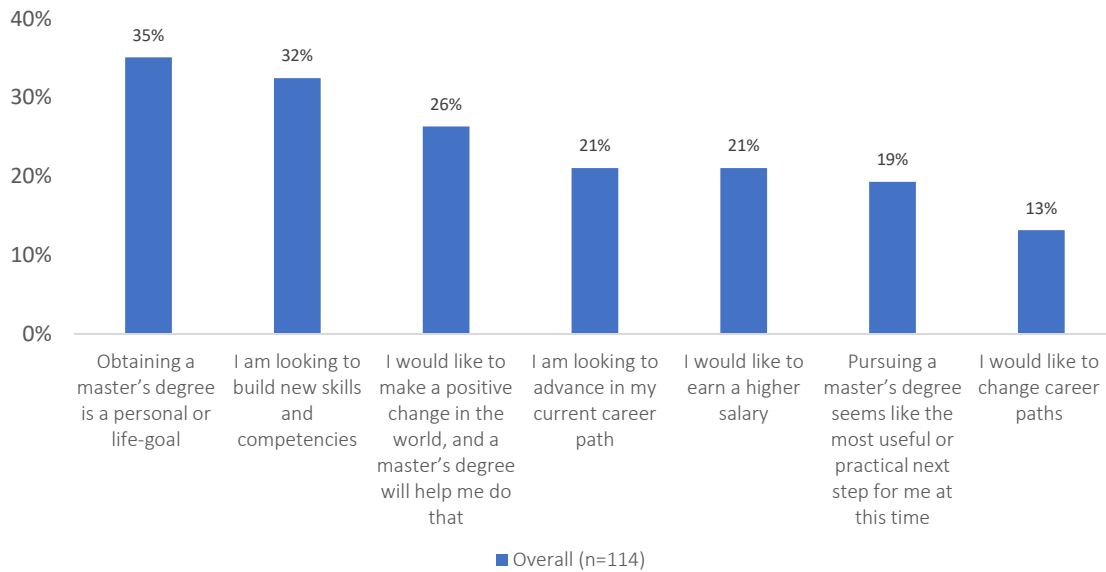
Figure 37: Interest in a Master of Public Administration



Questions for Qualified Respondents

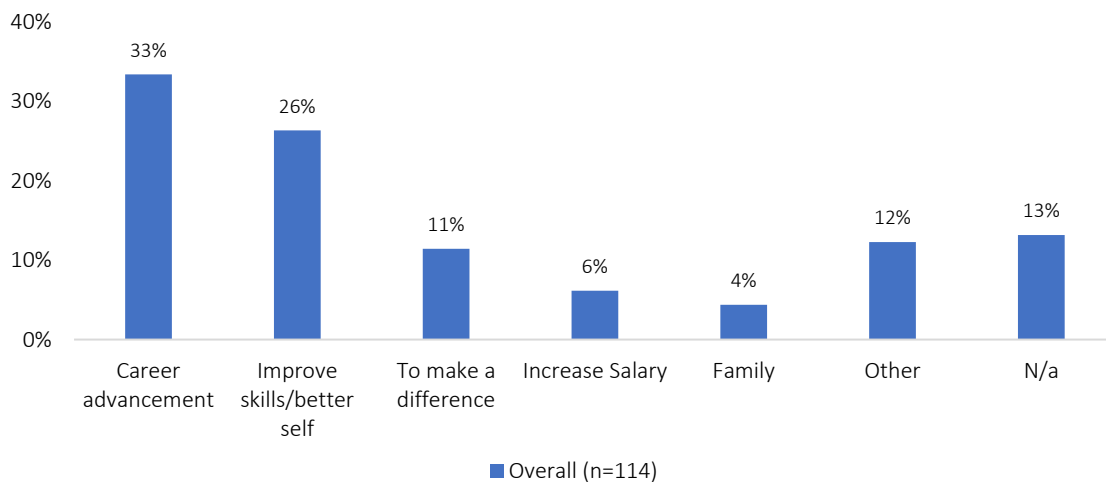
Respondents cited obtaining a master’s degree as a personal or life goal (35%) as the top reason for their interest in graduate school. Other reasons include building new skills and competencies (32%), wanting to make a positive change in the world (26%), and career advancement in their current career path (21%).

Figure 38: Reason for Interest in Graduate School



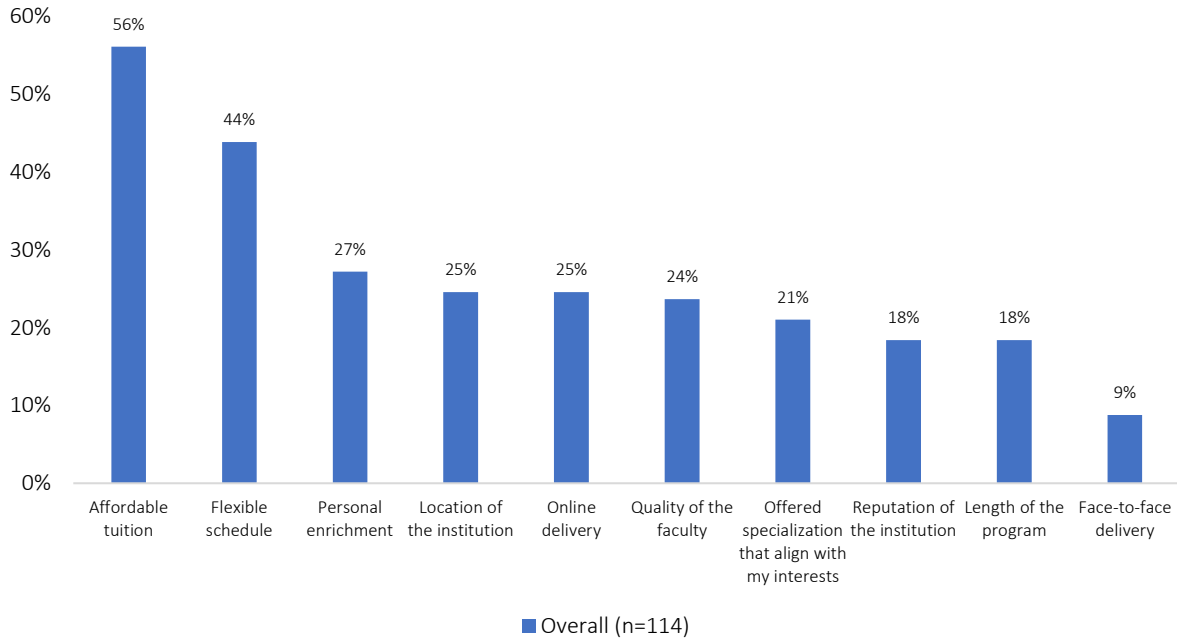
The main motivation for potential students considering an MPA was to advance their career (33%), followed by improving their skills or bettering themselves (26%), and the desire to make a difference (11%). This question was asked in an open-ended format. In order to showcase the results, answers were categorized into groups.

Figure 39: Main Motivation for Considering an MPA Program



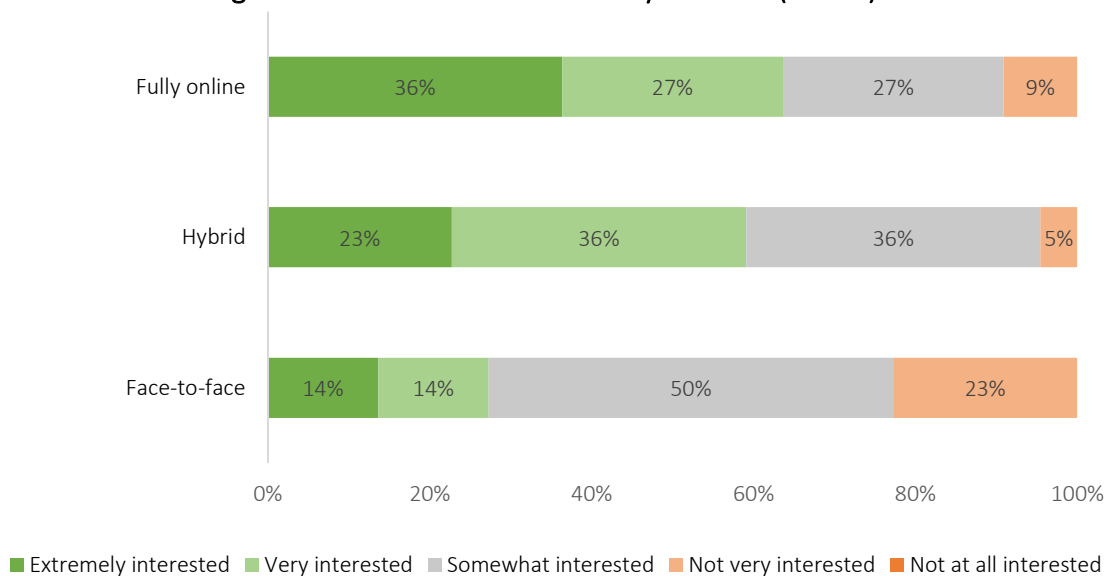
The three most significant factors when considering an MPA program were affordable tuition (56%), flexible schedule (44%), and personal enrichment (27%).

Figure 40: Significant Factors when Considering an MPA



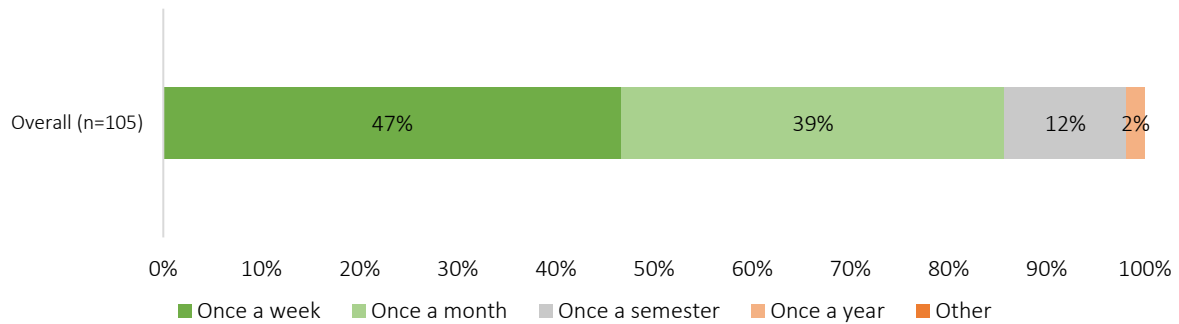
A third of potential students (36%) would be extremely interested in an MPA that is delivered fully online, well above the 23% who are extremely interested in a hybrid format and the 14% extremely interested in a face-to-face format.

Figure 41: Interest in MPA Delivery Formats (n=114)



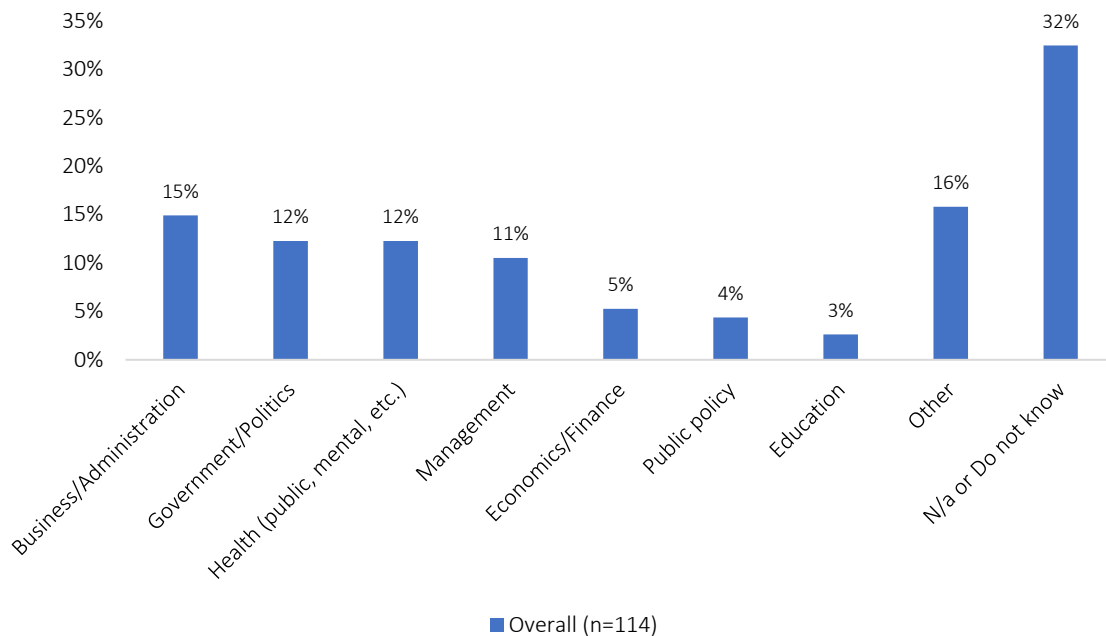
Among respondents who were at least somewhat interested in a hybrid delivery format, more face-to-face interaction appears to be preferred to less. Forty-seven percent of respondents who were at least somewhat interest in a hybrid delivery said they would prefer meeting once a week.

Figure 42: Frequency of Face-to-Face Component



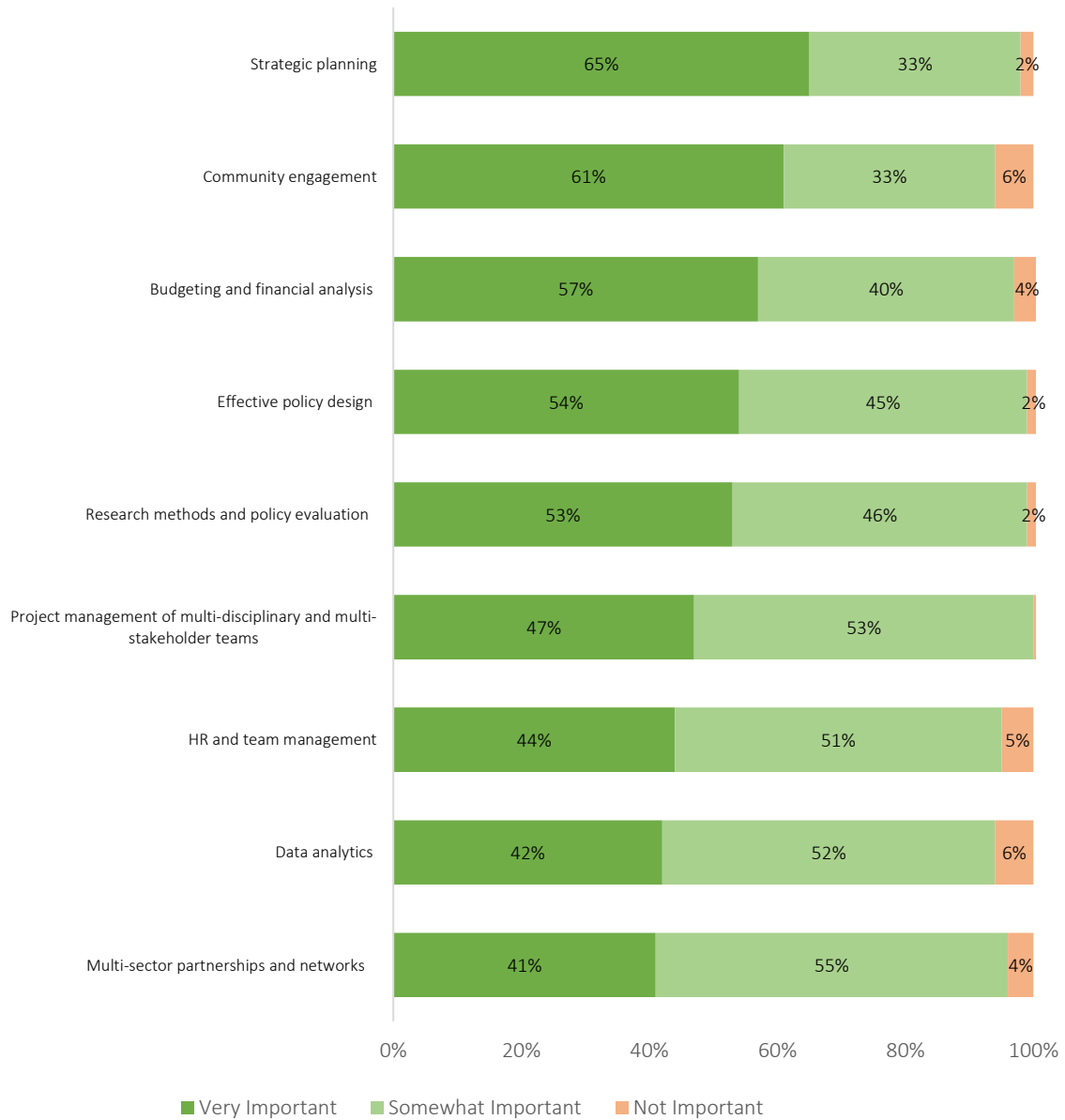
Among those who provided a specific topic or subject to be included in an MPA, the top responses include business/administration (15%), government/political content (12%), and other health-related material (12%). A third of potential students were not sure. Responses in the “other” category included leadership, technology, research methods, and safety. This question was asked in an open-ended format. Answers were categorized into groups.

Figure 43: Topics or Subjects to be Included in an MPA



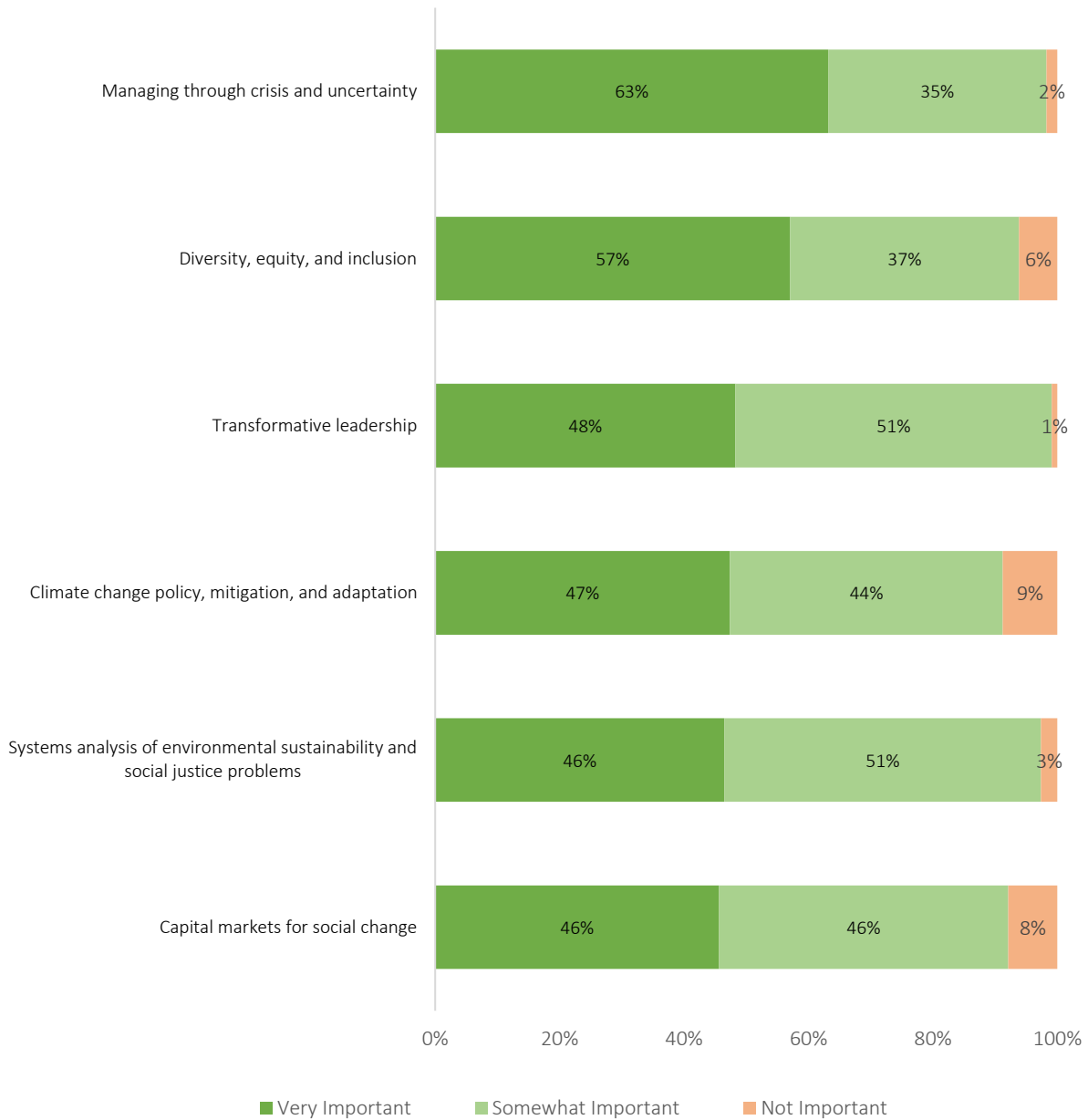
Among core curriculum topics, strategic planning had the highest percentage of potential students (65%) saying it was very important, followed by community engagement (61%), and budget and financial analysis (57%).

Figure 44: Importance of Select Core Curriculum Courses in the MPA Program (n=114)



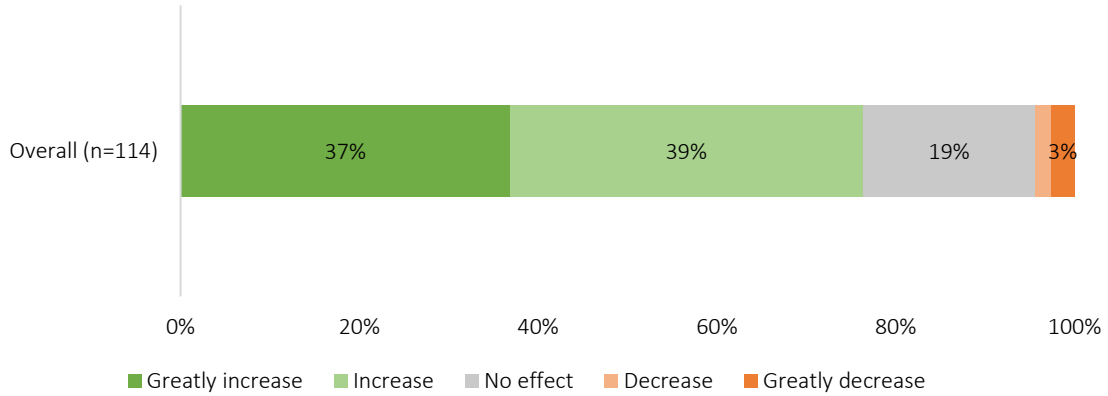
Managing through crisis and uncertainty had the highest percentage of potential students (63%) saying it was very important to have as an elective course, followed by diversity, equity, and inclusion (57%), and transformative leadership (48%).

Figure 45: Importance of Select Elective Curriculum Courses in the MPA Program (n=114)



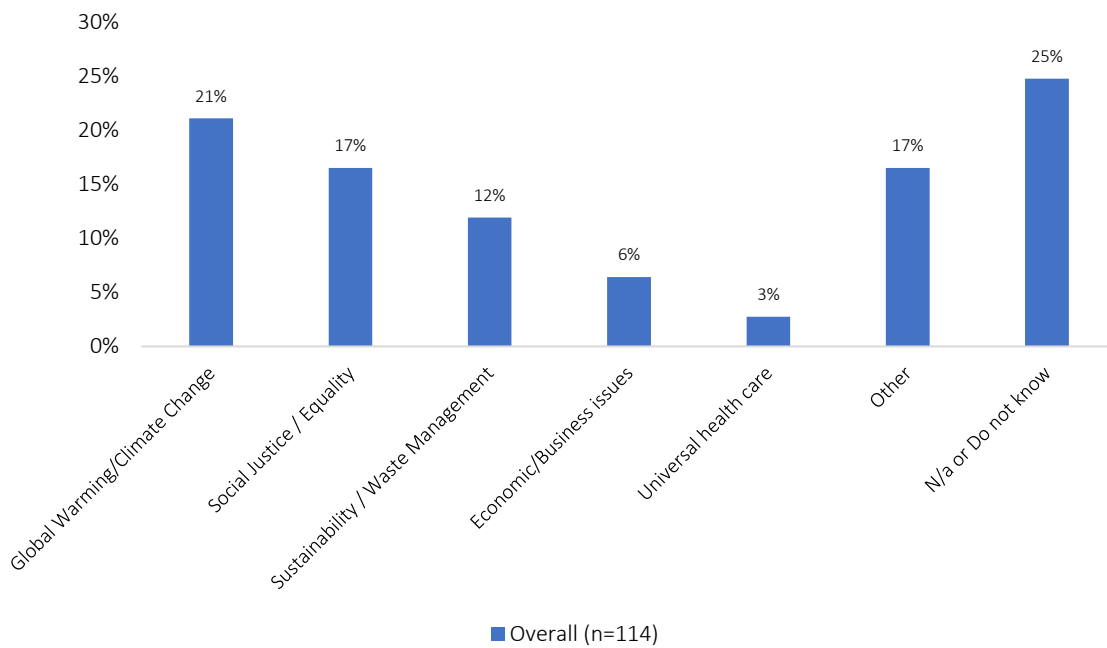
Approximately three-quarters of potential students (76%) said a focus on transformative, system-level change, through an emphasis on sustainability, social justice, and other environmental and social issues, would increase their interest level in the MPA program.

Figure 46: Focus on Transformative, System-Level Change Effect on Interest Level



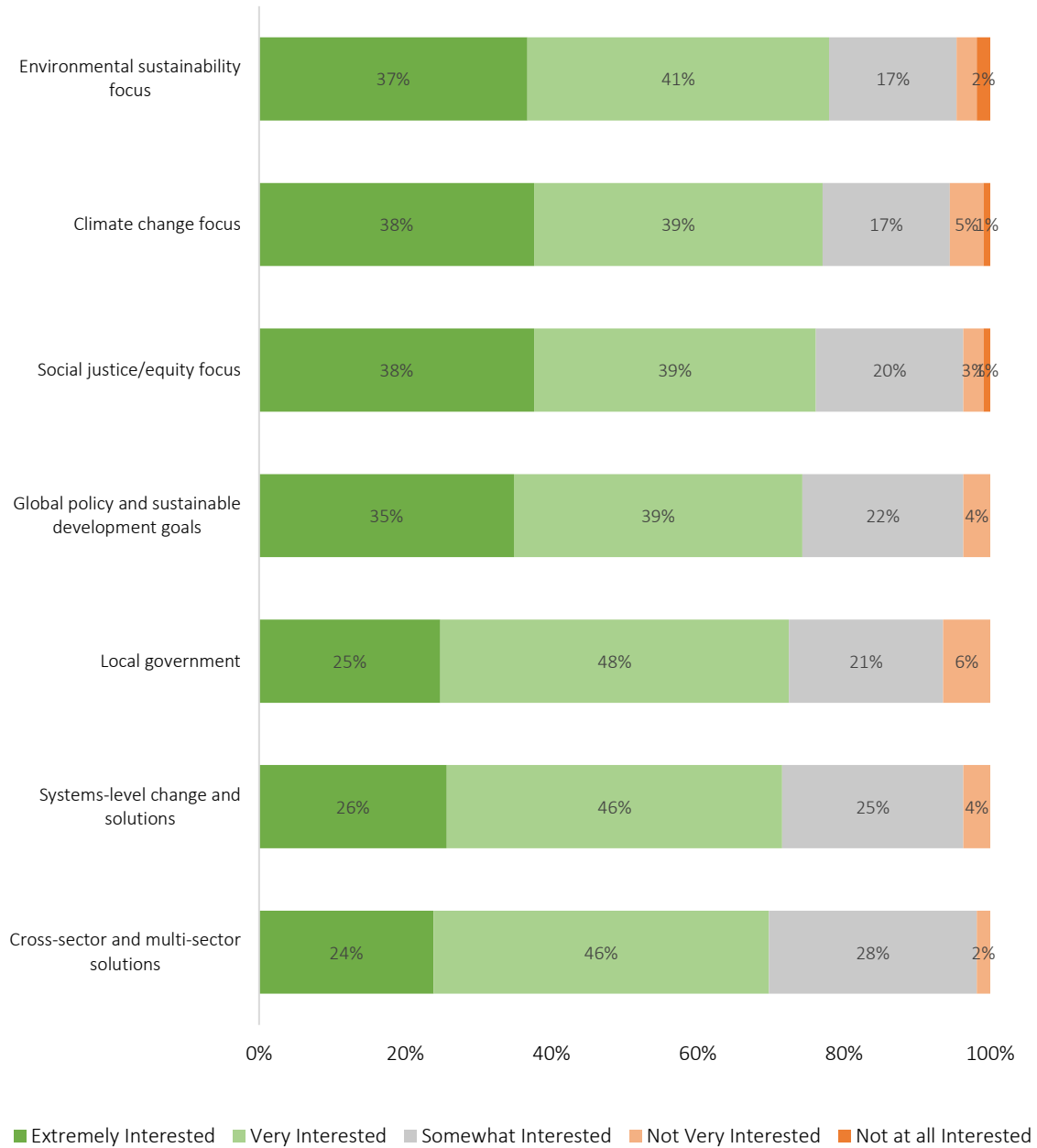
Potential students were most interested in the environmental or social topic of global warming/climate change (21%), followed by social justice and equality (17%). Only responses that were mentioned at least twice were included. Other responses include education, the stock market, and cross-sector solutions. This question was asked in an open-ended format. Answers were categorized into groups.

Figure 47: Environmental or Social Topic of Interest



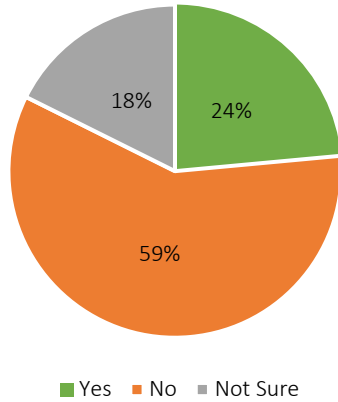
A focus on environmental sustainability had the highest percentage of potential students extremely or very interested (78%), followed by a focus on climate change (77%), and social justice/equity (76%).

Figure 48: Interest in Select Specializations (n=109)



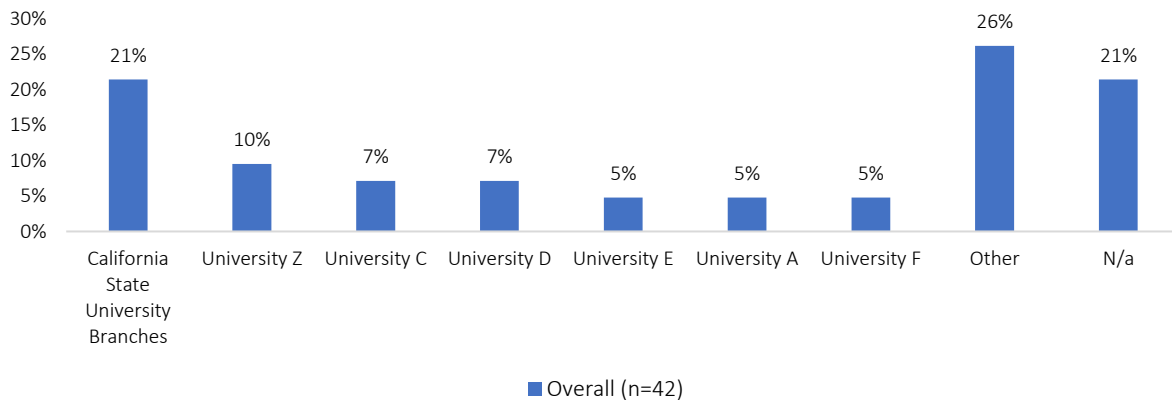
A quarter (24%) of respondents were aware of a school that offered an MPA program in their region.

Figure 49: Awareness of Schools that Offer an MPA in Your Region (n=114)



Participants were asked what schools they were aware of that offer an MPA in their region. The most popular answer was various California State University schools (21%). It should be noted that students in the San Francisco region listed University V, University A, University B, and University W. There was no mention of UPCEA University.

Figure 50: Schools that Offer an MPA



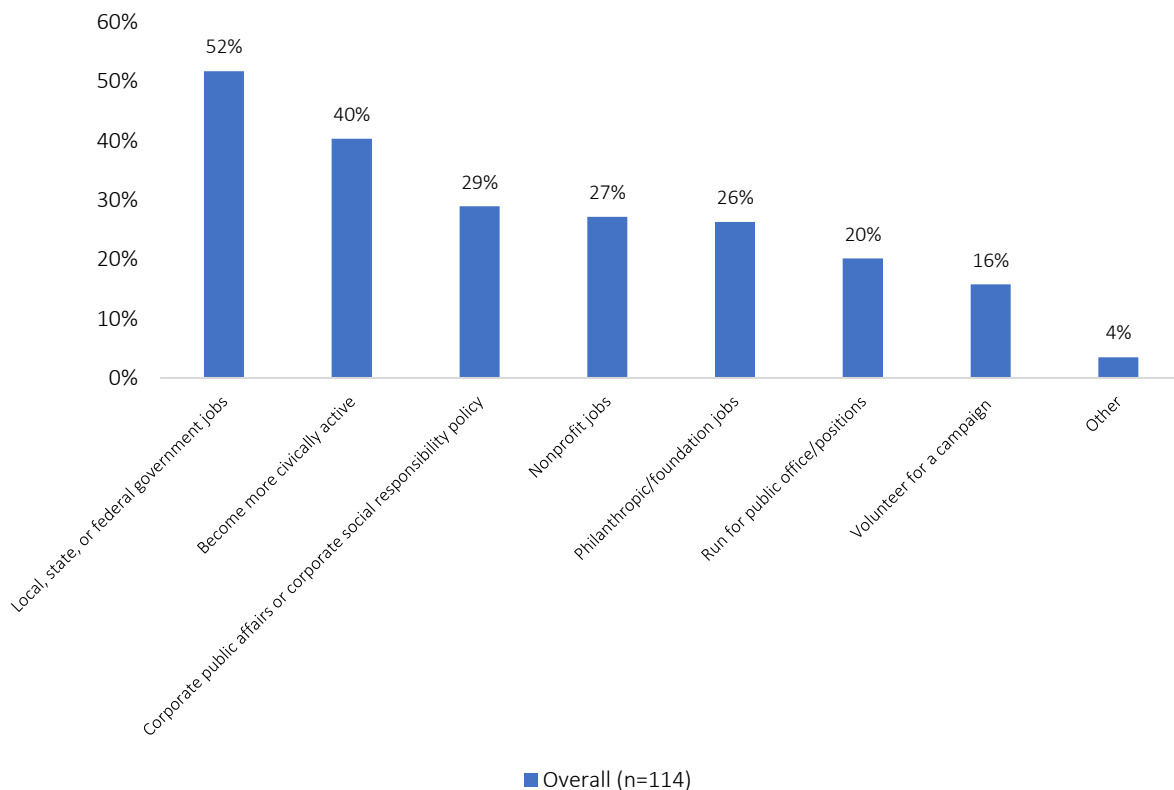
Participants were asked to give their impressions of MPA programs among institutions in California. University F’s MPA program had the highest rating of very reputable or somewhat reputable (83%), followed by University A (73%), and University B (73%). UPCEA University ranked second to last and suffered from a lack of awareness as 45% of all participants were unaware, including 41% of the San Francisco respondents. Additionally, 17% of all respondents said that UPCEA University’s MPA program was not very or not at all reputable. Therefore, this means that 30% of those who were aware of the program consider it not very or not all reputable, the highest of any institution.

Figure 51: Reputation of MPA Programs by Institution (n=114)

[figure redacted]

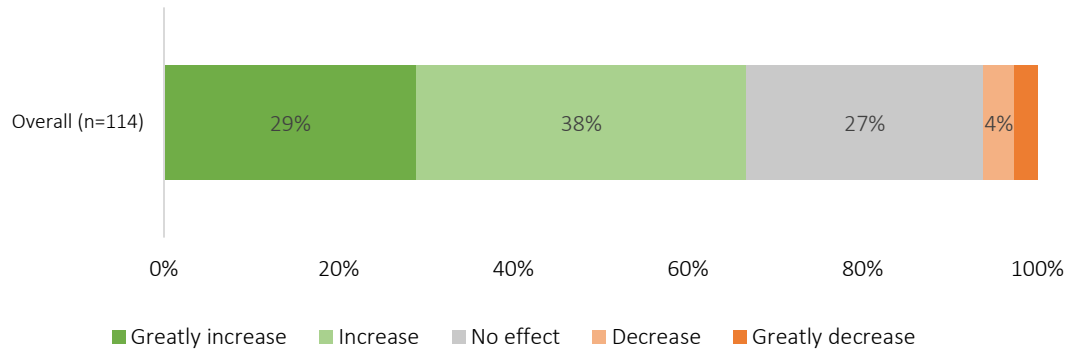
Upon completing an MPA program, slightly more than half of respondents (52%) plan to search for a job working for local, state, or federal government. Other popular responses included individuals planning to become more civically active (40%) and planning to work in corporate public affairs or corporate social responsibility policy (29%).

Figure 52: Plans Upon Completion of the Program



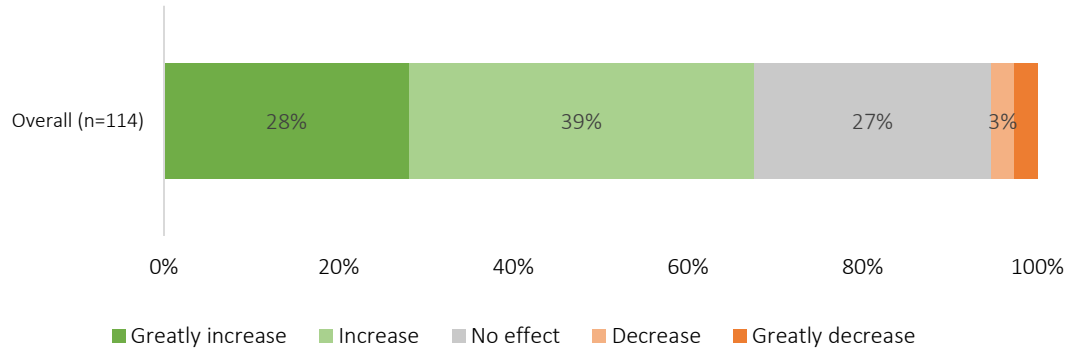
When asked what effect UPCEA University’s offering the MPA program fully online or in a low residency format would have on interest level, 67% said it would greatly increase or increase their interest in the program.

Figure 53: UPCEA University Offering Fully Online or Low Residency Format on Interest Level



When asked what effect UPCEA University offering the MPA program with a social justice and sustainability focus would have on interest level, 67% said it would greatly increase or increase their interest in the program.

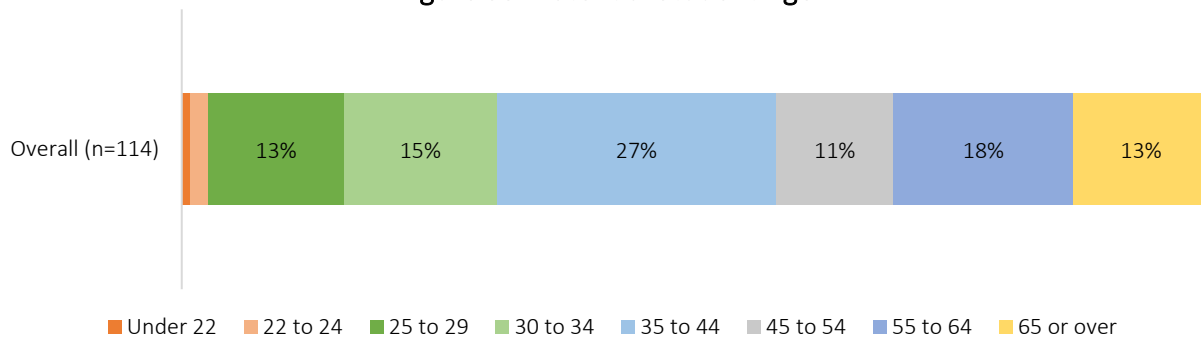
Figure 54: Fully Online UPCEA University Offering with Social Justice and Sustainability Focus Effect on Interest Level



Demographics

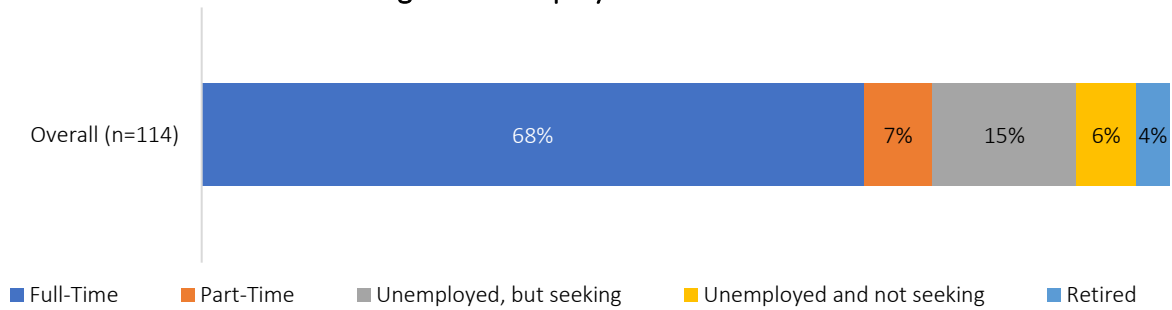
The largest age group of potential students (27%) was the 35 to 44 segment.

Figure 55: Potential Student Age



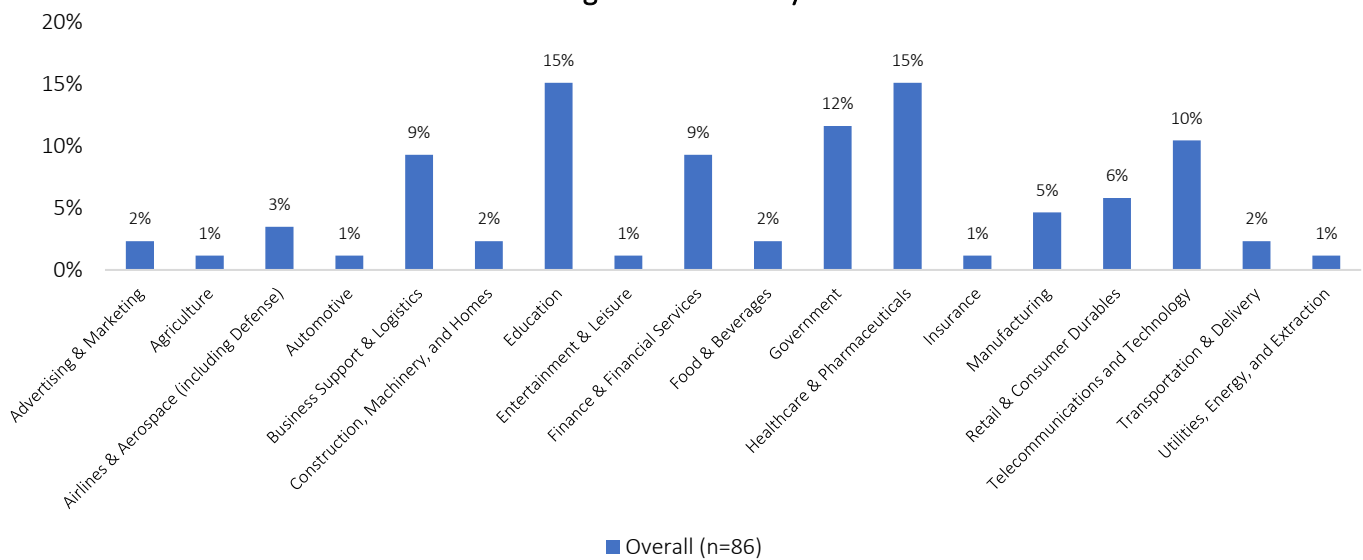
Approximately three-quarters are employed full-time (68%) or part-time (7%).

Figure 56: Employment Status



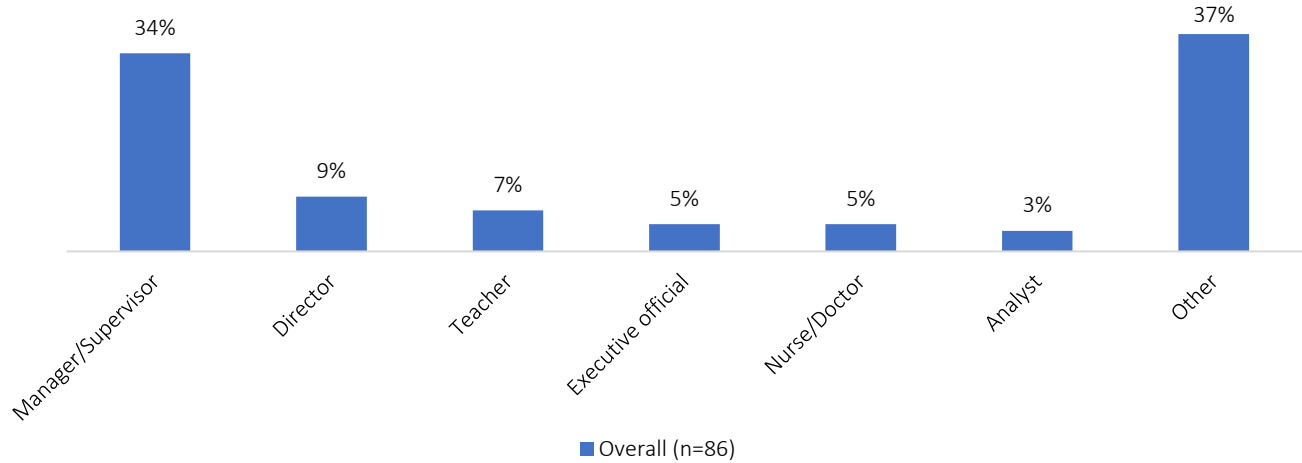
Education (15%) and healthcare & pharmaceuticals (15%) were the most common industries of employment for respondents, followed by the government (12%) and telecommunications and technology (10%).

Figure 57: Industry



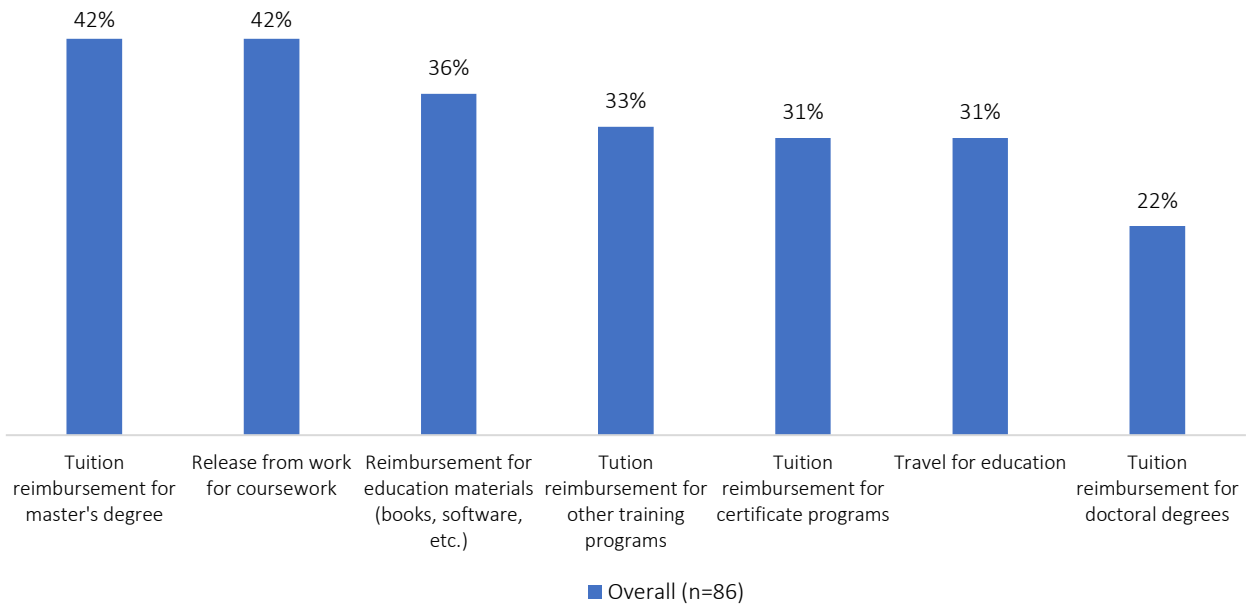
The most common job title of prospective students was manager/supervisor (34%) followed by director (9%) and teacher (7%). Responses mentioned less than three times were included in the “other” category. Examples of answers from this category included assistant, law enforcement officer, personal banker, and courier. This question was asked in an open-ended format. Answers were categorized into groups.

Figure 58: Job Titles



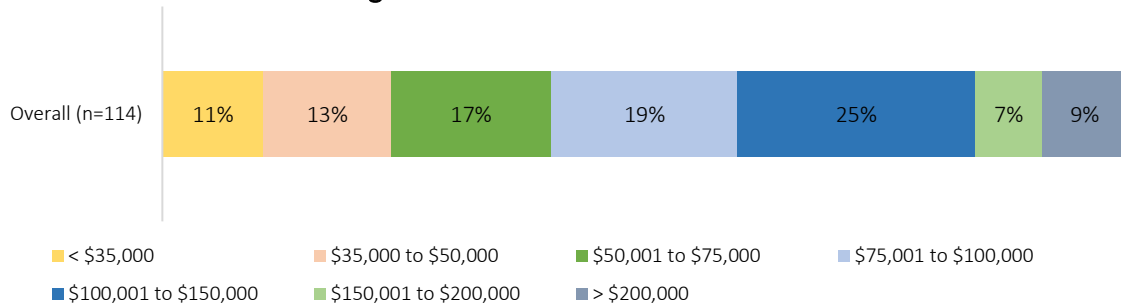
Forty-two percent of potential student’s employers offer tuition reimbursement for a master’s degree and release from work for coursework. Also, 36% of employers provide reimbursement for education materials and 33% tuition reimbursement for other training programs.

Figure 59: What Do Employers Provide



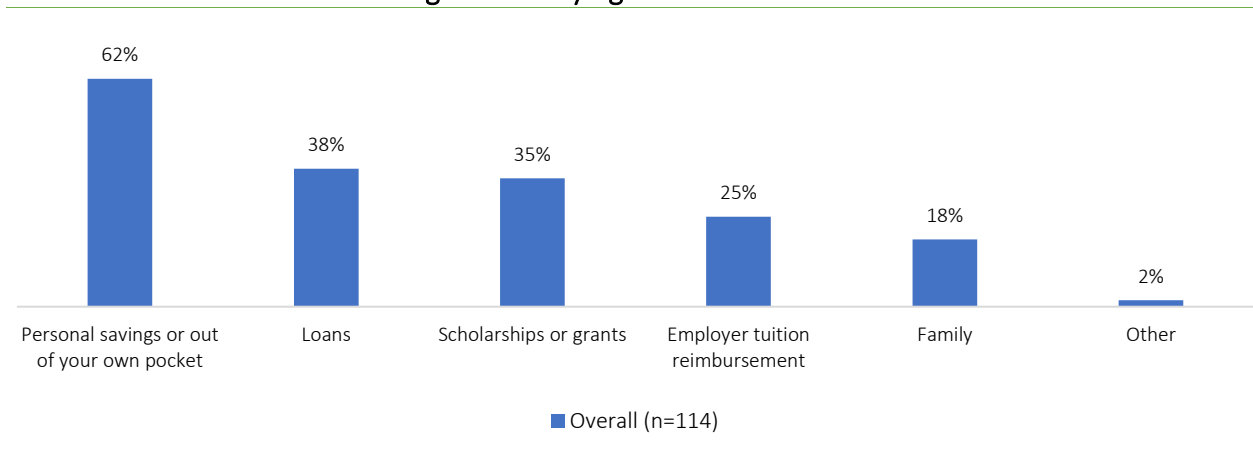
The largest household income group of potential students (25%) was the \$100,001 to \$150,000 segment.

Figure 60: Household Income



Potential students are most likely to pay for their education through personal savings (62%), followed by loans (38%), and scholarships or grants (35%).

Figure 61: Paying for School



Fifty-two percent of potential students identified as female.

Figure 62: Gender

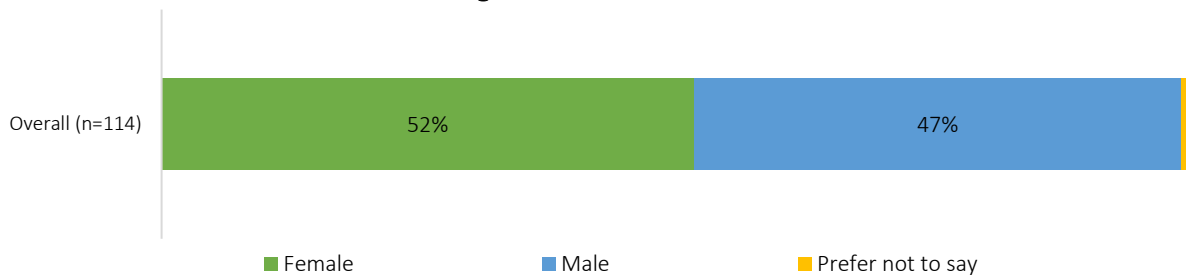


Figure 63 illustrates the location of potential students who qualified for the survey.

Figure 63: ZIP Codes of Potential Students

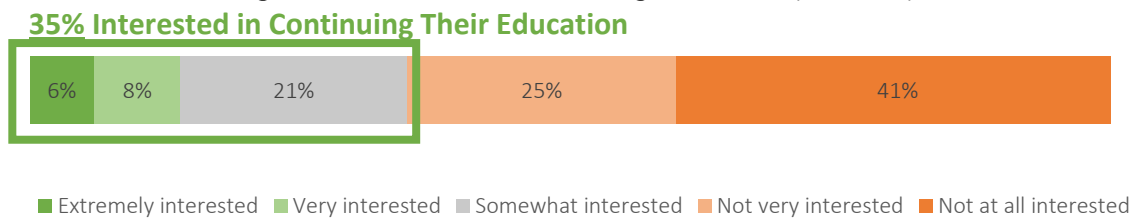
[Figure redacted]

X. Estimated Market Size

Based on the results of the potential student survey and the demographic features of the regions of interest, UPCEA extrapolated the estimated market size of the Master of Public Administration program.

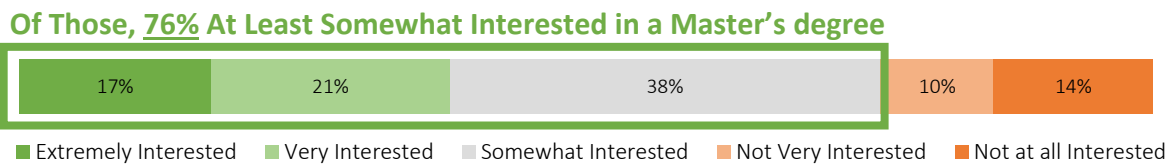
Of the 2,005 respondents who met the education requirements of the study, 35% had at least some interest in continuing their education. Those not interested in continuing their education were terminated from the survey.

Figure 64: Interest in Continuing Education (n=2,005)



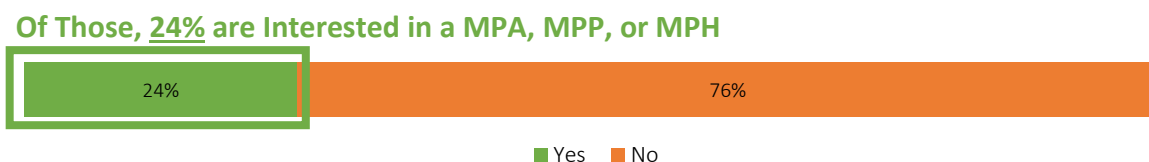
The 690 respondents (35%) who were at least somewhat interested in continuing their education rated their interest in a master's degree, with 17% extremely interested. Another 59% were very or somewhat interested.

Figure 65: Interest in a Master's Degree? (n=690)



Of the 520 respondents who are at least somewhat interested in a master's degree, 24% had interest in at least one of the following degrees: MPA, MPP, or MPH.

Figure 66: Interest in a MPA, MPP, or MPH? (n=520)



Of those who were at least somewhat interested in earning a master’s degree, and interested in either an MPA, MPH, or MPP program, 93% had some interest in a Master of Public Administration, with 27% extremely interested and 26% very interested.

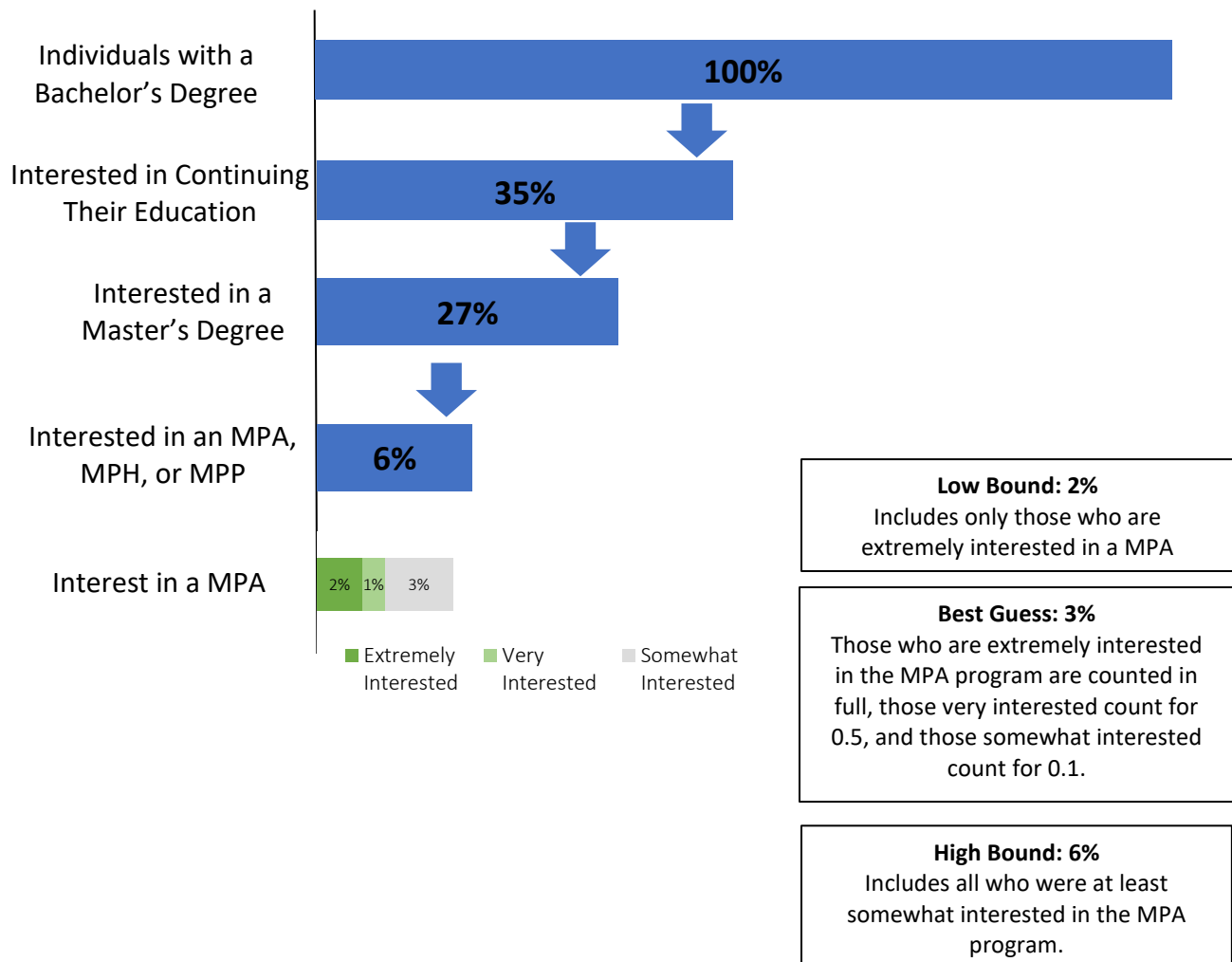
Figure 67: Interest in a Master of Public Administration (n=123)

Of Those, 93% At Least Somewhat Interested in a Master of Public Administration



Figure 68 shows the process of estimating the percentage of the target market that would be interested in the MPA degree. The target market here means individuals with a bachelor’s degree in one of the select occupations outlined in the occupational analysis.

Figure 68: High, Middle, and Low Estimate for % Interested in the Degree



Of the entire pool of surveyed individuals, 35% were at least somewhat interested in continuing their education. Of those individuals, 76% were at least somewhat interested in a master's degree, meaning that 27% of individuals with a bachelor's degree (76% of 35%) would be interested in earning a master's degree. Within that group interested in a master's degree, 24% had interest in an MPA, MPH, OR MPP. Of those individuals, 93% were at least somewhat interested in an MPA, or 6% of the overall target market.

Three different methodologies were used to construct a high bound, a low bound, and a "best guess," are as follows:

- **The high bound estimate** for the percentage of the bachelor's degree holder market who would be interested in the degree is 6%. This includes all those who said they were at least somewhat interested in the master's degree. Among the qualified target market
- **The low bound estimate**, 2%, includes only those who said they would be extremely interested in the master's program.
- **The best guess**, 3%, includes those who would be extremely interested in the MPA program in full (2%), half of those who were very interested in the program (1%), and one-tenth of those who were somewhat interested (0.3%).

Table 11 on the following page shows how the estimated market size for the Master of Public Administration degree was calculated. Due to the broad range of occupations which could be targeted for this program, and to better match the population surveyed, all bachelor's degree holders in the select regions were selected to represent the target market. Additionally, due to the small regional sample sizes (i.e. 17 survey participants from San Francisco), overall interest in the program was assumed not to vary significantly within the three regions.

Estimates are for the initial year or two of program launch. A number of factors could increase enrollments as the program matures. Estimates should be used as guidelines rather than definitive bounds.

In UPCEA's estimated market size calculation, the population of individuals who are exposed to marketing have already expressed interest in continuing their education, obtaining a master's degree, and an MPA program. Therefore, this population that would be exposed to marketing and would have interest in the MPA program are more likely to inquire than the general population. UPCEA estimates that 20% of this population that is exposed to marketing would inquire about program. While UPCEA University's average lead to enrollment conversion rate is 5%, this population would likely enroll at a higher percentage due to the unique qualities of the population.

The largest variable within these forecasts relates to marketing. If UPCEA University is able to effectively market the program, enrollments could exceed the forecasts. For example, if UPCEA University were able to increase its marketing reach from 1% to 2% in San Francisco, then the estimated enrollments would increase from 5-18 to 9-30. Additionally, as the program matures

and builds credibility it will likely benefit from word of mouth and other organic forms of marketing, which would further increase enrollments at minimal expense.

Lastly, UPCEA UNIVERSITY' use of the PPP lab and connecting with Mayor Libby Schaaf should further increase the visibility of the program, and subsequently enrollments. It is also important to note that the estimated market size only includes the three regions of interest employed throughout this research. UPCEA University has expressed interest in targeting major metropolitan areas such as Chicago, New York, Portland, and Seattle, among others, which could further increase enrollments beyond the estimated forecasts seen in Table 11.

The three regions were exclusive, meaning individuals in the San Francisco MSA were not “double counted” by also being included in the California data. Three regions were used:

- **San Francisco MSA:** 980,445 individuals hold a bachelor’s degree or higher; marketing reach estimated at 1.0%
- **California:** 4,486,605 individuals hold a bachelor’s degree or higher; marketing reach estimated at 0.10%
- **Contiguous States:** 1,803,791 individuals hold a bachelor’s degree or higher; marketing reach estimated at 0.05%

Table 11: Estimated Market Size for the Master of Public Administration Program

Market	2020 Individuals Bachelor’s Degree	Interested in Continuing Education and a Master’s Degree	Interested in an MPA	Estimated Marketing Reach	Number Reached by Marketing	Population with Interest in MPA Program & Reached by Marketing			Projected Inquiries (20% Inquiry Rate)			Projected Enrollments (10% Conversion)		
						Low Bound (27%)	Best Guess (44%)	High Bound (93%)	Low	Best	High	Low	Best	High
San Francisco	980,445	260,798	62,592	1.00%	626	169	275	582	34	55	116	3	6	12
California	4,486,605	1,193,437	286,425	0.10%	286	77	126	266	15	25	53	2	3	5
Contiguous States	1,803,791	479,808	115,154	0.05%	58	16	25	54	3	5	11	0	1	1
Total	7,270,841	1,934,044	464,170	-	970	262	427	902	52	85	180	5	9	18

UPCEA estimates UPCEA University could enroll between 5 and 18 students in the online program in the first few years, with a best guess around 9. This will depend on many factors, including how the program is marketed, the delivery of the program, the potential specializations within the program, the development of stackable certificates, the success and failures of competing institutions, and price of the program, among others.

Appendix

The following information was taken from each institution's website.

Competitors in California

University A – MPA Program

University A's MPA is a 21-month program that prepares graduates for public leadership by navigating the intersection of the public, private, and nonprofit sectors. The program prioritizes hands-on experience and helps students prepare to address the public interest and effectively implement public service strategies. Two years of professional work experience is preferred, and various courses are offered on Saturday.

University B – MPA Program

University B's MPA is a 39-42 credit program geared towards working adults. The program's courses are taught using high impact practices (HIPs) like collaborative assignments, community-based learning, and capstone experiences. All students in the program complete an e-portfolio to highlight the knowledge and skills they have gained over the course of the degree.

University C – MPA Program

University C's MPA is a 30-credit online and on-campus program that prepares its students to succeed in a wide range of public-focused organizations, including government agencies, non-profit and other nongovernmental organizations, private firms and advocacy groups. The program offers optional areas of concentration and may be pursued part-time or full-time.

University D – MPA Program

University D's MPA program is a 30-credit, one-year flexible on campus and online program, designed to benefit mid-career professionals in the public, private, and non-profit sectors. The program is geared towards students who hope to take on greater leadership and policy-focused roles in their workplace and professional communities. The curriculum focuses on policy analysis combined with deep engagement with questions of organizational leadership and ethics, innovation, economic analysis, and strategy.

University E – MPA Program

University E's MPA is one of the nation's top four MPA providers, offering both online and face-to-face instruction. The program is designed for those who are currently employed in the public, private or nonprofit sectors and looking to advance their careers, as well as for those seeking employment in these areas. The program is 36 credits, and offers concentrations in health administration, non-profit sector management and public sector management and leadership.

University F – MPA Program

University F's MPA is a 40-credit online and on-campus program that aims to prepare its students for a career in public management or in related public and private firms. The program, according to U.S News & World Report is rated third overall among public affairs schools nationwide and ranks fourth for the public management/administration specialty. The

curriculum has a focus on management, analytics, and policymaking while allowing its students to pursue their individual interests and concentrate in one of many specialized fields.

University G — MPA Program

University G's MPA program is a 39-credit online and on-campus program that prepares students for careers in public and nonprofit administration in local, state, and national government. The program offers a curriculum that stresses intellectual and theoretical foundations for professionals preparing to take on socially responsible roles in public leadership and service. Students also have the opportunity to specialize in urban management and affairs, nonprofits, gerontology and public health, as well as complete a JD/MPA dual degree.

University H — MPA Program

University H's MPA program is a 36-credit online program that aims for its students to not only increase their value within an organization, but the value they bring to society as a whole. The curriculum balances core competencies critical to becoming a successful leader, with a world view designed to broaden student's perspective of public service. Covering the key areas of finance, leadership, technology, public policy and political processes, MPA courses also develop essential skills in critical thinking, decision making, team development and human resource management.

University I — Executive MPA Program

University I's executive MPA program is a 36-credit online and on-campus program for working professionals who want to become a police or fire chief, city or county manager, legislative supervisor, or government department director. The program offers an accelerated, real-world curriculum geared for experienced professionals that can be completed in as little as 18 months.

National Online Competitors

University J — MPA Program

The University's MPA program is a 45-credit program that attracts students who are looking to become public service leaders. The program's courses instill the knowledge, skills, and competencies required to lead, including core classes on the theory and practice of public management.

University K — MA in Public Management

University K's MA program is a 36-credit program that can be completed online or on campus in 16-24 months. The curriculum combines academics and strategic skills, challenging students to apply the latest theory, scientific findings, and new management methods to help solve real-world governance and policy issues. The program covers both strategic applications and fundamentals of public management through courses on policy analysis and evaluation, financial management, economics and fiscal policy, and public policy and administration.

University L – MPA Program

University L's MPA program is a 13-course program that can be completed on campus or online. The curriculum offers courses that focus on both the administrative and analytical sides of policy. The program can be completed through part-time study or the one-year accelerated option. Students are also required to complete either a thesis or capstone project.

University M – MPA Program

University M's MPA program is a 36-credit online program that can be completed in two years. The program is taught by the same faculty as on campus with live weekly classes. Students in this program will gain a solid foundation of core competencies focused on management in the field of public service, preparing them for jobs at all levels of government and in the nonprofit sector. The University also offers three graduate certificates.

University N – Executive Master of Public Services and Administration

University N's Executive Master of Public Services and Administration is a 39-credit online program that aims to develop principled leaders for the public and nonprofit sectors through a focus on ethics and public policy principles. MPSA students have ample opportunities to engage in public service and to develop leadership skills both inside and outside the classroom through interaction with high-level public leaders, real-world consulting projects, student organizations, and the school's Public Service Leadership Program.

University O – Master of Public Administration and Leadership

University O's Master of Public Administration and Leadership is a 32-credit online program that offers a curriculum that meets the flexibility needs of mid-career professionals. The program aims to equip students with the tools to effectively address management challenges in the workplace. The program can be completed in two years while working full-time.

University P – MPA Program

University P's MPA program is a 39 to 42 credit online program which gives students greater professional and personal flexibility while still allowing them to have a face-to-face learning experience and participate in group activities. The program aims to prepare its students with professional expertise in public policy so that they may succeed in local government, state agencies, nonprofit organizations and non-governmental organizations.

University Q – MPA Program

University Q's MPA program is a 36-credit online program designed to prepare students for a career of public service in all three arenas of public service: government agencies, nonprofit organizations and private vendors. Program activities are designed to develop and enhance technical, ethical and leadership competencies.

University R – MPA Program

University R's MPA program is a 42-credit online program that prepares its students to hold positions in the public and non-profit sector, as well as in private sector firms. The program can also be paired with graduate certificates in public finance and procurement, homeland security and emergency management, nonprofit and community development, human resource management, international and public administration and urban policy innovations.

University S – MPA Program

University S's MPA program is a 39-42 credit program that can be completed on campus or online. Students in the program have the opportunity to concentrate in specific areas of study such as public management, nonprofit management, healthcare administration, ethical leadership or analytics.

University T – Online Master of Public Administration and Policy

University T's online Master of Public Administration and Policy is a 36-credit program that prepares its students to lead in positions across government and the private and non-profit sectors. The curriculum focuses on developing strong analytics, creativity, communication, leadership and problem-solving capabilities. The program also allows students access to a network of public policy experts, prestigious faculty and well-connected alumni.

University U – MPA Program

University U's MPA program is a 30-credit program that can be completed on campus or online. The program aims to incorporate service learning, providing real-world experiences, developing community partnerships and cultivating leadership skills. With a focus on strategic planning, public policy, organizational management, financial management and more, students graduate prepared for a career in public administration or the opportunity to advance in their current position.