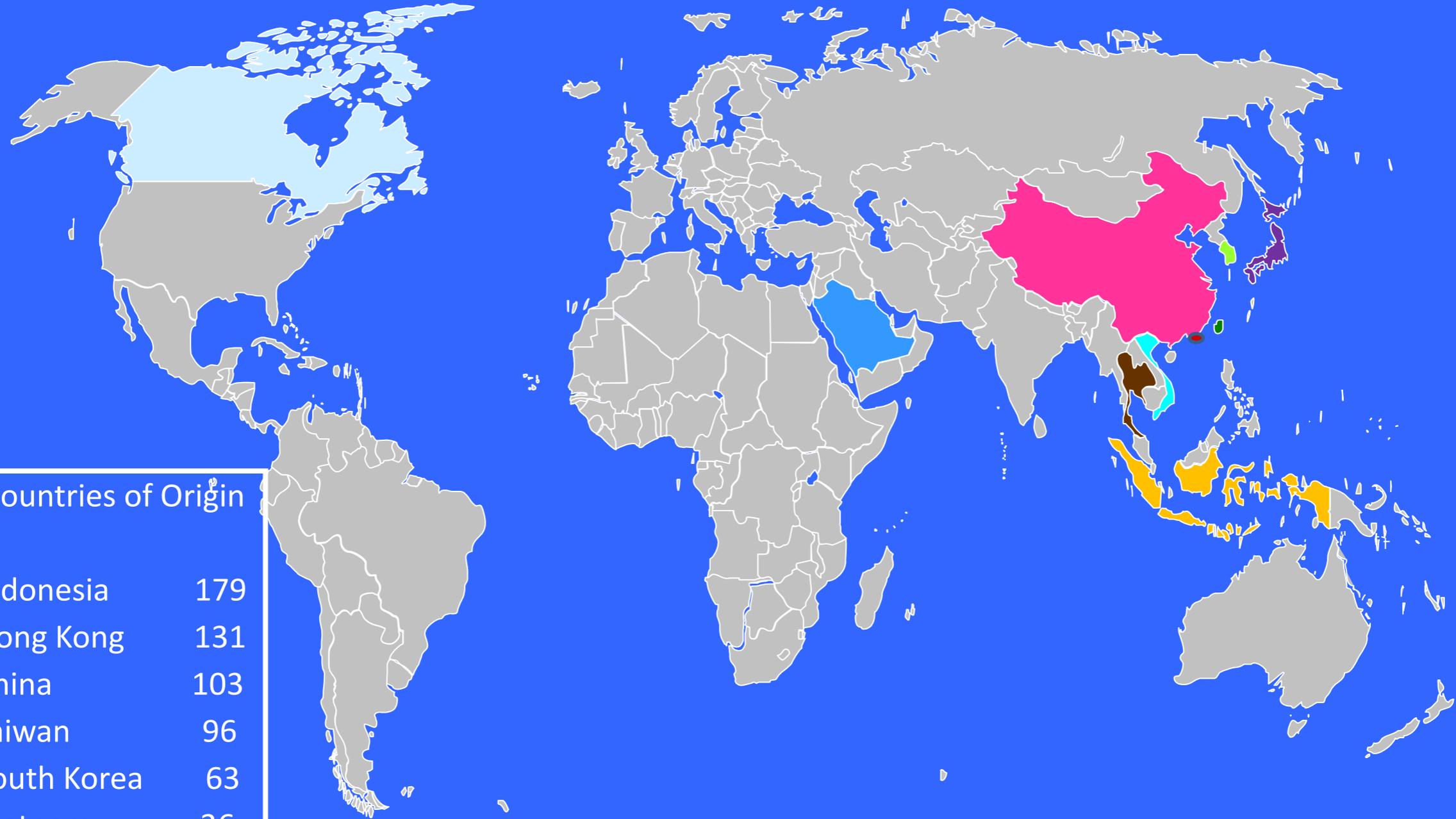


Global Education and Engagement



Top Countries of Origin

1. Indonesia	179
2. Hong Kong	131
3. China	103
4. Taiwan	96
5. South Korea	63
6. Vietnam	36
7. Japan	30
8. Saudi Arabia	9
9. Thailand	7

Who are our International Students?

Why do they Come?

- Reputation of U.S Higher Education as one of the best in the world—quality education
- Reputation of Shoreline—word of mouth
- 95% University Transfer Program—Top Majors:
Business, Engineering, Computer Science, Biology, Chemistry, Physics, Music, Art, Psychology, Economics
- High School Completion + University Transfer
- Intensive English Language
- Seattle—world class companies
- American Experience—Global Competencies

INSTITUTE OF INTERNATIONAL EDUCATION

Open Doors Data

Special Reports: **Community College Data Resource**

International Students: Top Places of Origin 2011-12

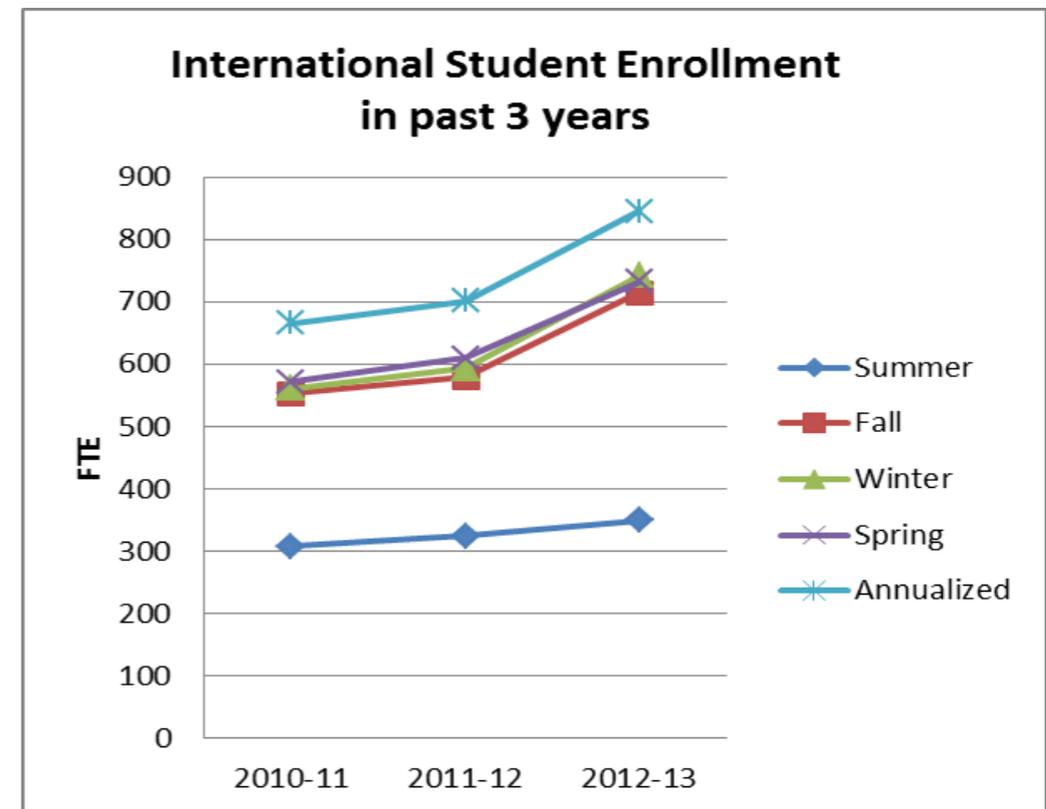


TOP 10 PLACES OF ORIGIN OF INTERNATIONAL STUDENTS AT COMMUNITY COLLEGES, 2010/11

Rank	Place of Origin	% of Enrollment
1.	South Korea	13.4
2.	China	13.0
3.	Vietnam	8.7
4.	Japan	5.8
5.	Mexico	4.0
6.	Hong Kong	3.6
7.	Indonesia	2.7
8.	Nepal	2.5
9.	Venezuela	2.3
10.	Brazil	2.2

International Growth Story

2012-13 International Student FTEs compared to past two years				
Quarter	2010-11	2011-12	2012-13	Growth in past year
Summer	308	324	349	8%
Fall	553	578	714	24%
Winter	561	593	741	25%
Spring	572	609	732	20%
Annualized	665	701	845	21%



- Largest international student growth story in the history of Shoreline.
- Our business plan projected no growth in 2011-12 and a modest 10% growth in 2012-13
- Largest growth was seen in Fall 2012 and Winter 2013



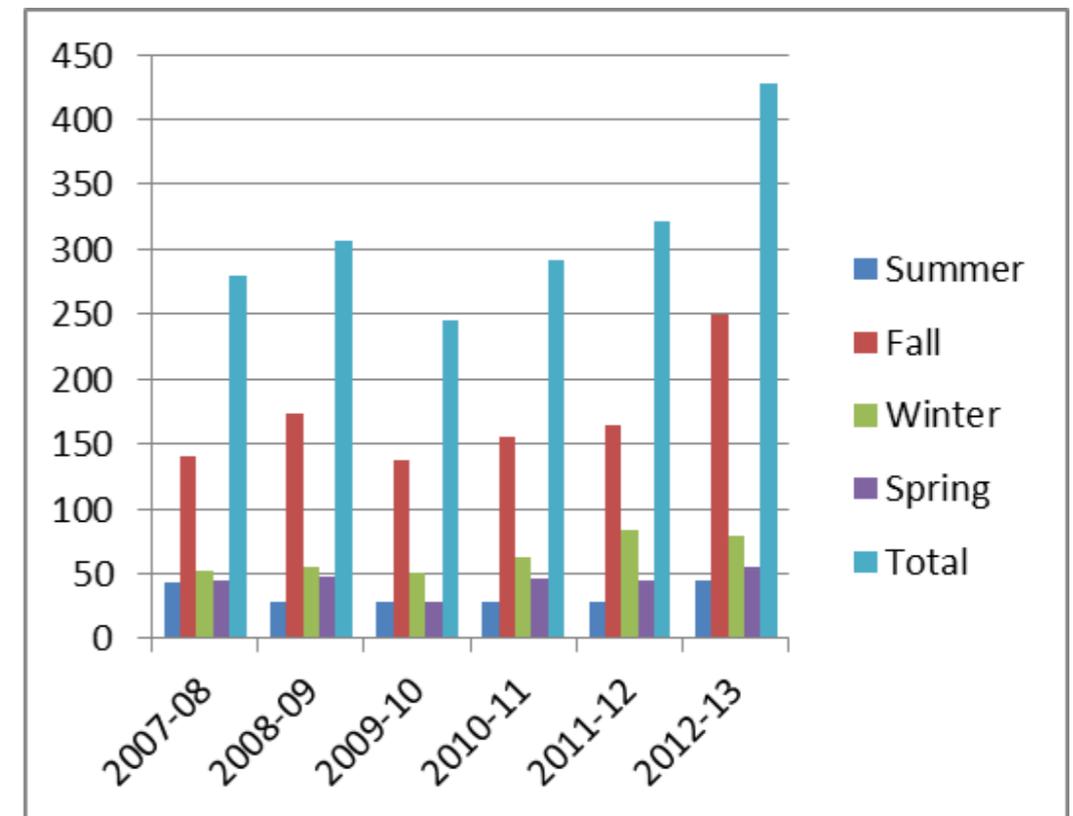
Yield Rate Comparisons

	2010-11	2011-12	2012-13
Applications	790	810	951
Total Admitted Students	488	504	618
Agent-referred admitted students	233	267	359
Self-referred admitted students	255	237	259
Yield Rate for Agent-referred Students	79%	74%	80%
Yield Rate for Self-referred admitted students	42%	54%	57%

Carried out 4498 mandated SEVIS (Homeland Security) processes compared to 3805 last year (18% increase)

New International Students 2007-08 to 2012-13

Quarter	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Summer	43	29	29	28	28	44
Fall	141	174	138	156	165	250
Winter	52	55	50	62	83	79
Spring	44	48	28	46	45	55
Total	280	306	245	292	321	428



Yearly and Quarterly Comparisons

Summer 2011 vs. Summer 2012			
Country	Summer 2011	Summer 2012	% Change
Indonesia	79	101	28%
Hong Kong	100	82	-18%
Taiwan	46	50	9%
China	36	46	28%
Korea, South	39	43	10%
Japan	27	25	-7%
Vietnam	10	13	30%
Thailand	4	5	25%
Saudi Arabia	2	4	100%

Fall 2011 vs. Fall 2012			
Country	Fall 2011	Fall 2012	% Change
Indonesia	123	165	34%
Hong Kong	141	134	-5%
China	56	105	88%
Taiwan	72	93	29%
Korea, South	67	71	6%
Vietnam	19	34	79%
Japan	30	31	3%
Thailand	5	6	20%
Saudi Arabia	1	2	100%

Yearly and Quarterly Comparisons

Winter 2012 vs. Winter 2013			
Country	Winter 2012	Winter 2013	% Change
Indonesia	130	185	42%
Hong Kong	140	141	1%
China	57	102	79%
Taiwan	73	94	29%
Korea, South	72	67	-7%
Vietnam	19	36	89%
Japan	33	29	-12%

Spring 2012 vs. Spring 2013			
Country	Spring 2012	Spring 2013	% Change
Indonesia	137	179	31%
Hong Kong	125	131	5%
Korea, South	77	63	-18%
Taiwan	75	96	28%
China	65	103	58%
Japan	33	30	-9%
Vietnam	22	36	64%
Thailand	8	7	-13%
Saudi Arabia	4	9	125%

Financial Contribution

International Students' Financial Contribution to Washington State 2011-12

<i>Total Number of International Students in WA State</i>	<i>20,198</i>
Total Contribution of International Students and Families	\$534 million
Total Contribution in District 07 (Our congressional district)	\$240 million
Total Contribution of Shoreline International Students	\$14 million

IE Operating Budget; Comparison of Revenue and Expenses

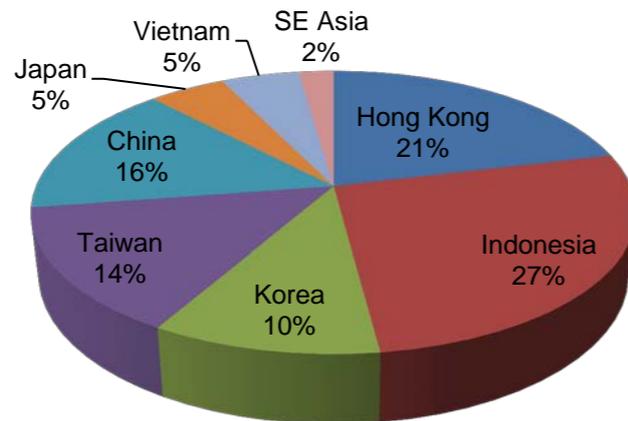
2012-13 FTE	2012-13 Operating Budget	2012-13 Revenue	% of IE Operating Expenses to Revenue 2012-13
840	\$2,252,747	\$6,251,814	36%
Projected FTEs	2013-14 and beyond Proposed Operating Budget	Projected Revenue	% of IE Operating Expenses to Revenue
1000	\$3,014,982	\$7,442,634	41%
1250	\$3,242,558	\$9,303,293	35%
1500		\$11,163,951	No plan for 1500 FTE

Note: Revenue does not include State Allocation.

Total 2012-13 Marketing Expenses and Revenue by Top Producing Countries

	Hong Kong	Indonesia	Korea	Taiwan	China	Japan	Vietnam	SE Asia	Total
Total Expenses	\$187,335.25	\$275,474.93	\$38,507.20	\$66,338.36	\$260,516.73	\$24,156.80	\$82,960.60	\$42,859.62	\$978,149.49
Total Revenue	\$1,252,915.77	\$1,575,205.14	\$608,169.60	\$843,841.96	\$903,665.08	\$287,107.23	\$294,748.30	\$131,898.22	\$5,897,551.30
ROI	569%	472%	1479%	1172%	247%	1089%	255%	208%	503%

2012-2013 TOTAL REVENUE BY COUNTRY



Quarter	2010-11		2011-12		2012-13		Difference
	Headcount	Revenue	Headcount	Revenue	Headcount	Revenue	+/-
Summer	353	\$761,917.28	367	\$821,015.22	418	\$885,752.69	\$64,737.47
Fall	548	\$1,303,144.04	560	\$1,371,253.14	723	\$1,757,580.39	\$386,327.25
Winter	547	\$1,322,774.83	576	\$1,433,293.05	731	\$1,814,418.82	\$381,125.77
Spring	558	\$1,354,671.71	584	\$1,462,448.62	690	\$1,794,061.99	\$331,613.37
Total Revenue	2006	\$4,742,507.86	2087	\$5,088,010.03	2562	\$6,251,813.89	\$1,163,803.86



China





Indonesia



Fast Facts: Population: 251,160,124

Capital: Jakarta

Ethnic Groups: Javanese 40.6%, Sudanese 15%, Madurese 3.3%, Minangkabau 2.7%, Betawi 2.4%, Bugis 2.4%, Banten 2%, Banjar 1.7%, other or unspecified 29.9%

Languages: Bahasa Indonesia (official, modified form of Malay), English, Dutch, local dialects (of which the most widely spoken is Javanese)

Religions: Muslim 86.1%, Protestant 5.7%, Catholic 3%, Hindu 1.8%, other 3.4%

Median Age: 28.9

Indonesia is the 18th place of origin for all international students in U.S. 7th for community colleges.

- Indonesia is our top country of origin
- Dominant agent market; 94% of Indonesian students are agent referred.
- In return, they expect strong support—attending their fairs, seminars, parent meetings and advertising in their print media.
- Highly competitive market for Puget Sound community colleges
- Indonesians are # 1 users of social media—Facebook.





Vietnam



Fast Facts:

Colonized by French in 1887; French ruled until defeated by Communist forces in 1954. Vietnam war lasted 20 years until 1973. North and South Vietnam reunited in 1975.

Population 92,477,857

Capital: Hanoi

Ethnic Groups: Kinh (Viet) 85.7%, Tay 1.9%, Thai 1.8%, Muong 1.5%, Khmer 1.5%, Mong 1.2%, Nung 1.1%, others 5.3%

Languages: Vietnamese (official), English (increasingly favored as a second language), French, Chinese, and Khmer, mountain area languages (Mon-Khmer and Malayo-Polynesian)

Religions: Buddhist 9.3%, Catholic 6.7%, Hoa Hao 1.5%, Cao Dai 1.1%, Protestant 0.5%, Muslim 0.1%, none 80.8%

Median Age: 28.7

- Vietnam ranks # 8 in top places of origins for international students and # 3 for community colleges.
- We have seen a 65% increase in Vietnamese students this year.
- Participated in 15 fairs in multiple cities.
- Launched a marketing campaign with Capstone. Attended fairs, advertised on social media sites.
- Recently held a TV interview to highlight U.S. community colleges and Shoreline. Broadcasted across Vietnam.





Saudi Arabia

Fast Facts:

Saudi Arabia is the birthplace of Islam and home to Islam's two holiest shrines in Mecca and Medina. The modern Saudi state was founded in 1932. Saudi Arabia is the world's leading producer of oil and holds 17% of oil reserves.

Population 26,939,583

Capital: Riyadh

Ethnic Groups: Arab 90%, Afro-Asian 10%

Languages: Arabic (official)

Religion: Muslim (official) 100%

Median Age: 26

- Saudi Arabia is the 4th largest sender of students to the U.S. with a 50.4% increase last year. # 16 for community colleges.
- New market for Shoreline
- 125% increase from 4-9 students.
- Students are sponsored by the Saudi Arabian Cultural Mission (SACM).
- Developed Shoreline Fact Sheets and page on website in Arabic.
- Placed ads in Arabic in StudyUSA magazine distributed across the Middle East.



Marci Fradkin represented Shoreline at the International Conference on Higher Education in Riyadh; We were the first community college allowed at the fair.

Shoreline joins the world stage in India



Samira Pardanani attended the India-U.S. Higher Education dialogue in June, 2013 featuring U.S. Secretary Kerry.

Making in-roads into Cambodia



Short Term Programs

Celebrating 20 Years with Japan HTC
Korea Aju Automotive Training—2 week
“Science without Borders”—Brazil



Challenges and Opportunities

- Increased competition for international students globally
- Lack of understanding about U.S. higher education system and community colleges— university transfer program
- Stigma of “community” as a neighborhood or continuing education school
- Lack of host families/housing in local community
- Social unrest, economic downturns, natural disasters

Strategic Actions to Enhance Success



- Campus Buy-in
- Housing—build a dorm
- Study Abroad programs and scholarships for students
- Open new markets
- Increase short-term training programs
- Remember why we are doing this

Snapshot for Fall 2013

Admitted Students Fall 2013, August 14, 2013

Country	Admitted Students	Agent-referred	Transfer in
China	115	75	12
Hong Kong	50	45	2
Indonesia	48	44	1
Taiwan	33	30	7
Vietnam	25	15	2
Japan	13	8	
Korea, South	13		7
Saudi Arabia	12		2
Mongolia	4	4	
Qatar	4		1
Syria	2	2	
Mali	2		1
Thailand	2	1	
Jordan	2	2	
United Kingdom	2	1	
Australia	1		
South Africa	1		
Malaysia	1		
Canada	1	1	
Spain	1		1
Tunisia	1		1
Egypt	1		
Gambia, The	1		
Azerbaijan	1		
India	1		
Ghana	1		
Chile	1		
Russia	1		1
Grand Total	340	228	38

LAST YEAR - August 15, 2012

Country	Admitted Students	Agent referred	Transfer in
China	88	54	8
Egypt	1		
Eritrea	1		
Gambia, The	6		
Hong Kong	50	43	2
India	1		1
Indonesia	73	68	
Japan	3	1	1
Kazakhstan	3		
Korea, South	15	2	5
Mongolia	3		
Nepal	2		1
Nigeria	1		
Pakistan	1		
Qatar	1		
Russia	2		
Spain	1		1
Taiwan	38	26	10
Vietnam	16	11	1
Grand Total	306	205	30

Vision: Institute of International Education

Educational, cultural and professional opportunities transcend borders to foster a peaceful and interconnected world where all people achieve their full potential; think and act as global citizens; and build inclusive, thriving communities.

Source: Institute of International Education

www.iie.org

Thank you!

Presented by:

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