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ENVIRONMENTAL SCAN

MASSAGE THERAPISTS

Inland Empire Region

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CENTER OF EXCELLENCE
Inland Empire Region

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Vision: We aspire to be the premier source of regional economic and workforce information and insight for community colleges.

Acknowledgments: The Inland Empire Center of Excellence would like to thank and recognize our industry, education, and economic development partners who supported this project by providing input, content, research support, and feedback. Special thanks to Greene & Associates, The Atticus Group, Inc., Massage Envy Limited, LLC, and Fullerton College.

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Centers of Excellence, Economic and Workforce Development Program

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In a regional survey, employers anticipate hiring 298 new Massage Therapists, of which 66% will be full time positions, in the next 24 months.

— Source: COE Industry Survey

Executive Summary

As a result of the 2008 Inland Empire Allied Health Occupations environmental scan, Massage Therapist was identified as one of 12 occupations in the region that will provide the greatest number of new and replacement jobs over the next five years. Yet, there are no publicly funded educational programs for this occupation in San Bernardino or Riverside Counties. Thus, this occupation was selected for study and a regional survey was administered and completed by employers representing 447 Massage Therapists.

Massage is no longer just an occasional luxury, but a frequent part of a person's overall healthcare regimen. Many insurance and healthcare companies include massage therapy as a covered benefit. As such the industry is shifting from primarily sole proprietorships to professional groups which share overhead costs and manage insurance claims. In addition, the certification procedures are complicated and undergoing change. These shifts have implications upon both curriculum content and occupational required skills and abilities.

A five year projection for San Bernardino and Riverside Counties estimates this occupation will increase by 16% from 862 to 999 jobs. However, according to IPEDS data, there were over 500 program completers in both 2007 and 2008 within the region. Even though 60% of new therapists leave the occupation, in analyzing both the labor market data and the local survey results there does not seem to be any gap in the quantity of available massage therapists. However, there are significant reasons to consider creating a Massage Therapy program including: the financial benefit to students compared to the exorbitant costs of for-profit vocational school tuition, industry's desire for high quality applicants, and the success of other community college programs.

The pros and cons for starting a publicly-funded Massage Therapy program in the Inland Empire are presented herein. Recommendations for regional community colleges include:

- “Re-package” existing courses into a Massage Therapy training program, if possible
- Engage in a quality versus. quantity dialog to evaluate the maximum benefit for the local community
- Leadership must evaluate the possibility of leveraging existing equipment, courses, and faculty resources
- Leadership should proactively convene strategic partners for an outcome-focused discussion of the tangled licensure and certification challenges surrounding the Massage Therapy profession
- New and existing programs should offer curricular options for either the entrepreneur or the employee recognizing the shift occurring in the field.

Introduction

The California Community Colleges Economic and Workforce Development Program (EWD) has charged the Centers of Excellence (COE) with identifying industries and occupations that have unmet employee development needs. The Centers provide information to community colleges so that they can respond to industry needs with appropriate education and training programs. (See Appendix A for more information on the Centers of Excellence and how to use this report).

As a result of the 2008 Inland Empire Allied Health Occupations environmental scan, Massage Therapist was identified as one of 12 occupations in the region that will provide the greatest number of new and replacement jobs over the next five years. Moreover, there are no publicly funded educational programs for this occupation in San Bernardino or Riverside Counties at any level. Thus, primary research was conducted to provide an overview of the occupation of massage therapy including: the necessary skills and competencies, employment projections, the national and state regulatory environment, costs of program development and the feasibility of a community college response.

In spite of economic challenges, California will continue to experience an overall gain of employment positions within the healthcare support occupations as a population-serving occupational cluster. This environmental scan on Massage Therapists (MT) will outline the opportunity, challenges, and industry needs within San Bernardino and Riverside Counties (referred to as the Inland Empire).

Industry Survey

Recognizing massage therapy as an emerging industry, the Inland Empire Center of Excellence partnered with The Atticus Group Inc., a consulting and research firm focused on the healthcare industry, to gain input from employers to assess whether their need for well-educated massage therapists was being met. The survey was developed in collaboration with the soon-to-be largest employer of massage therapists in the region, Massage Envy. CG Funk, Massage Envy's Vice President of Industry Relations and Product Development, and Tony Zak, Vice President of Product Development, recommended and promoted the COE survey to best assess regional needs throughout the profession. The survey was developed and distributed via email and telephone interviews to a variety of Massage Therapist employers in both Riverside and San Bernardino Counties.

Survey distribution proved challenging as many massage therapists are self employed either as a standalone practice or in partnership with a chiropractor or physical therapy business. A total of 32 surveys were completed

Company Profile

Massage Envy, a national massage therapy franchise company, was ranked the #20 Fastest Growing Franchise by Entrepreneur Magazine in 2009.

Currently there are 110 locations in CA, ten in the Inland Empire and 90 more CA locations under development.

Massage Envy projects their national employment of massage therapists to grow from 13,000 in 2009 to 30,000 by 2012, which represents an astounding 43% increase in just 3 years.

by employers representing 447 MTs, of which, 253 work full time, and 194 work part time as MTs.¹ Among the respondents, ten (31%) were sole proprietors. The other 22 (69%) survey respondents represent the larger MT employers in the region including some of the larger resort/casinos, 8 out of 10 Inland Empire Massage Envy locations, and several of the larger free standing Day Spas. Results from this survey are included throughout this report. Survey questions and qualitative responses are located in Appendix B.

Industry Overview

In 2005, massage therapy was projected to be a \$6 to \$11 billion a year industry.² This is not terribly surprising considering that almost a quarter of adult Americans (24 percent) had a massage at least once in the last 12 months.³ However, the industry carries various stigmas and the general population often has preconceived notions about the composition of the industry.

Perception Problem

According to many within the profession, massage therapy suffers from a perception problem. As a practice, its use dates back thousands of years; as a result, the word “massage” brings to mind many different ideas for the consumer. Moving from the realm of “alleviating stress” in the discretionary market of personal care, to now being recognized as a therapy that alleviates physical ailments in the allied healthcare context, massage therapists are now classified by the National Bureau of Labor Statistics as a Healthcare Support Occupation.⁴

Growth in the Industry

The American Massage Therapy Association reports that more people than ever are receiving therapeutic massages for a multitude of reasons.⁵ Some of the benefits of massage include relaxation, stress reduction, sore muscle relief, increased blood circulation, pain management, injury recovery and rehabilitational therapy. As more people learn about the benefits of massage therapy, Massage Therapy as an industry is expected to grow faster than average over the next five years. Currently there are an estimated 7,400 massage therapists in the state of California. EMSI projects growth in the industry to reach nearly 8,300 massage therapists, an increase of 12% by 2013. In 2008, there were just over 860 massage therapists working within the Inland Empire region. A five year projection for this region estimates this group will increase its numbers by 16% (about 140 MTs) to just under 1,000 massage therapists.



Massage Envy therapist Vasso Anest, of Riverside, massages client Jessica Wise, of Riverside.
Photo: The Press-Enterprise

¹ A survey response rate is not calculated since the survey was e-mailed and forwarded. The exact number of massage therapists that received the survey is unknown.

² Center for Medicare & Medicaid Services. (2004) National Health Expenditure Projections 2004-2014. Barnes P, Powell-Griner E, McFann K, Nahin R. CDC Advance Data Report #34.

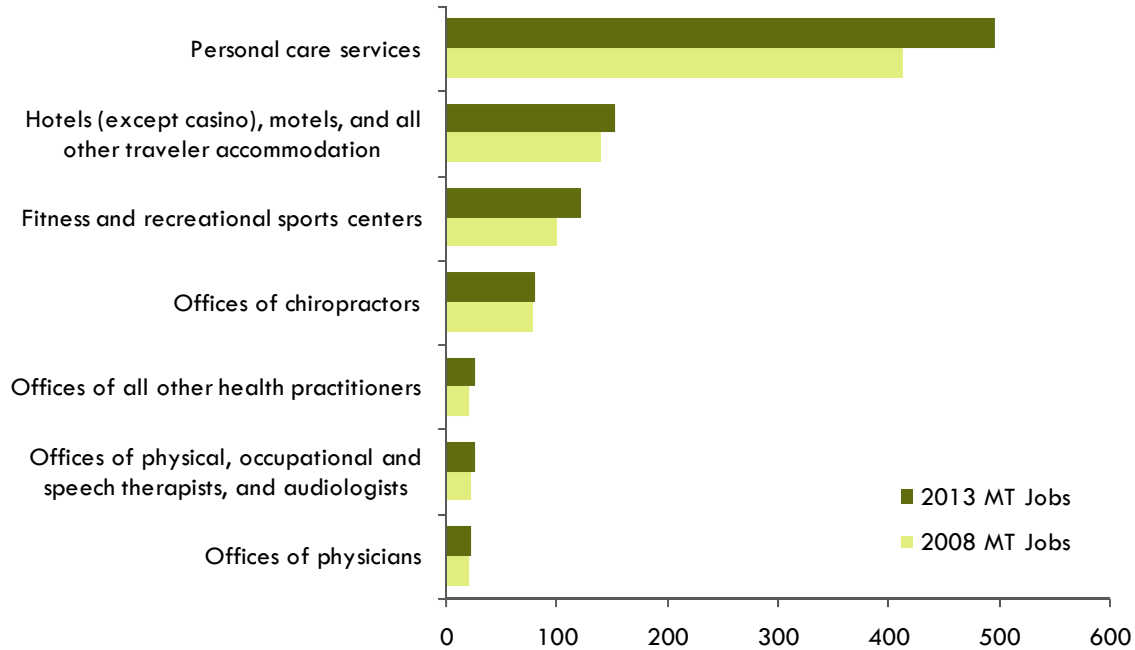
³ 2008 and 2007 AMTA Consumer Surveys . <http://www.amtamassage.org/news/MTIndustryFactSheet.html>

⁴ http://www.bls.gov/oes/current/oes_40140.htm#b31-0000

⁵ American Massage Therapy Association. <http://www.amtamassage.org>.

The majority of massage therapists work in Personal Care Services (NAICS code 812100), either in their own offices or in local spas. The rest of the industry is employed in hotels, fitness and recreational sports centers, chiropractic offices and the offices of other health professionals. The projected rate of increase over the next five years places most massage therapists in personal care services, hotels and spas, fitness and sports centers and offices of other health practitioners.⁶

Exhibit 1 – Top Employers for Massage Therapists



NAICS Code	Industry	2008 MT Jobs	2013 MT Jobs	Change	% Change
812100	Personal care services	413	497	84	20%
721100	Hotels (except casino), motels, and all other traveler accommodation	141	154	13	9%
713940	Fitness and recreational sports centers	102	123	21	21%
621310	Offices of chiropractors	80	81	1	1%
621340	Offices of physical, occupational and speech therapists, and audiologists	23	27	4	18%
621390	Offices of all other health practitioners	22	28	6	27%
621100	Offices of physicians	21	23	2	10%

In the Inland Empire, an increased demand for massage therapy services is indisputable. For example, in the City of Corona where the population has increased over 10% since 2002, applications for massage businesses have spiked in the past few years, with a 90 percent increase from 2007 to 2008.⁷

⁶ EMSI Covered Employment - Fall 2008. See Appendix X for EMSI data sources and calculations.

⁷ City of Corona, <http://www.ci.corona.ca.us/>

Occupational Overview

General Description⁸

Massage therapists can specialize in over 80 different types of massage, called modalities. Today, massage therapy is being used as a means of treating painful ailments, decompressing tired and overworked muscles, reducing stress, rehabilitating sports injuries and promoting general health. This is done by manipulating the soft tissue muscles of the body in order to improve circulation and remove waste products from the muscles.

Clients may seek massage for medical benefit or for relaxation purposes, and there is a wide range of massage treatment available to meet these distinct needs. Massage therapy that aims to improve physical health typically differs in duration and technique from massage that is intended to simply relax or rejuvenate clients. The training background of those who perform the two types of massage differs as well. Swedish massage, deep tissue massage, reflexology, acupressure, sports massage, and neuromuscular massage are just a few of the many approaches to massage therapy. Most massage therapists specialize in several modalities, which require different strokes with a cupped or closed hand. A massage can be as long as 2 hours or as short as 5 or 10 minutes. Usually, the type of massage given depends on the client's needs, the client's physical condition, and cost for treatment. For example, therapists use special techniques for elderly clients than that they would not use for athletes, and they use approaches for clients with injuries that would not be appropriate for clients seeking relaxation. There are also some forms of massage that are given solely to one type of client, for example prenatal massage and infant massage.

Massage therapists work in an array of settings both private and public: private offices, studios, hospitals, nursing homes, fitness centers, sports medicine facilities, airports, and shopping malls, for example. Some massage therapists also travel to clients' homes or offices to provide in-home services. Presently this occupation includes a large percentage of part-time and self-employed workers. However, it is not uncommon for full-time massage therapists to divide their time among several different settings, depending on the clients and locations scheduled.

Today's Massage Therapists are...

- Most likely to enter the massage therapy profession as a second career.
- Predominantly female (85%).
- In their early-40s, on average.
- Most likely to be members of a professional organization.
- Working an average of 19 hours a week providing massage. (Excluding time spent on other business tasks such as billing, bookkeeping, supplies, maintaining equipment, marketing, scheduling, etc.)
- Charging an average of \$63 for one hour of massage.
- Earning an average wage nationally of \$41.50 an hour (including tip) for all massage related work.
- Giving an average of 41 massages per month.
- Likely to provide massage therapy in a number of settings, including their own home, spa/salon, their own office, a healthcare setting, health club/athletic facility, or massage therapy only franchise or chain.
- Eighty-nine percent (89 percent) of massage therapists provide Swedish massage, followed by 82 percent who provide deep tissue massage, 52 percent trigger point, and 49 percent sports massage.

- 2008 American Massage Therapy Association Industry Survey

⁸ United States Department of Labor, Bureau of Labor Statistics <http://stats.bls.gov/oco/ocos295html>

Because of the physical nature of the work and time needed in between sessions, massage therapists typically give massages less than 40 hours per week. Most therapists who work 15 to 30 hours per week consider themselves to be full-time workers, because when time for travel, equipment set-up, and business functions (such as booking and billing) are totaled, a massage therapist's hours per week may very well be more than 40 hours. The U.S. Bureau of Labor Statistics estimates that about 42 percent of all massage therapists work part time and 20 percent had variable schedules in 2006.⁹

Knowledge, Skills and Abilities¹⁰

A massage therapist must have knowledge of the principles for providing customer service and personal care. This includes customer needs assessment, evaluation of customer satisfaction and meeting quality standards for all services provided. As a therapist and counselor, the massage therapist must have knowledge of the procedures and methods for diagnosis, treatment and rehabilitation of physical and mental ailments. Knowledge of human behavior, individual differences, learning and motivation adds to the success of the therapist. Key knowledge, skills and abilities include the following:

- Oral comprehension, the ability to listen and understand information and ideas presented through spoken words and sentences.
- Communication & customer service, the ability to communicate information and ideas in speaking so others will understand. Must be able to listen to, understand, and respond to clients before, during, and after treatment.
- Speech clarity, the ability to speak clearly so others can understand you.
- Speech recognition, the ability to identify and understand the speech of another person.
- Problem sensitivity, the ability to tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem.
- Multi-limb coordination, the ability to coordinate two or more limbs (for example, two arms, two legs, or one leg and one arm) while sitting, standing, or lying down. It does not involve performing the activities while the whole body is in motion.
- Arm-hand steadiness, the ability to keep your hand and arm steady while moving your arm or while holding your arm and hand in one position.
- Dynamic strength, the ability to exert muscle force repeatedly or continuously over time.
- Manual dexterity, the ability to quickly move your hand, your hand together with your arm, or your two hands to grasp, manipulate, or assemble objects.
- Trunk strength, the ability to use your abdominal and lower back muscles to support part of the body repeatedly or continuously over time without 'giving out' or fatiguing.

In the industry survey, employability skills and clinical skills were cited as the most common deficient skills among massage therapist applicants. Other comments included a lack of professionalism, customer service, interviewing skills and retail experience. See Appendix D for a listing of additionally mentioned deficient skills.

⁹ United States Department of Labor, Bureau of Labor Statistics <http://stats.bls.gov/oco/ocos295html>

¹⁰ O-Net Online <http://online.onetcenter.org/link/summary/31-9011.00>

Specific Tasks and Work Activities¹¹

Massage Therapists must confer with clients about their medical histories to identify the best approach for treatment and maintain accurate treatment records. They provide clients with guidance for home care and assess their soft tissue condition. A typical session includes finger and hand pressure to specific points of the body while kneading the muscles or other soft tissues. Treatments may occur in clients' homes or offices, or in other settings. According to O-net, some specific occupational tasks include the following:

- Confer with clients about their medical histories and any problems with stress and/or pain in order to determine whether massage would be helpful.
- Maintain treatment records.
- Provide clients with guidance and information about techniques for postural improvement, and stretching, strengthening, relation and rehabilitative exercises.
- Assess clients' soft tissue condition, joint quality and function, muscle strength, and range of motion.
- Develop and propose client treatment plans that specify which types of massage are to be used. Refer clients to other types of therapists when necessary.
- Apply finger and hand pressure to specific points of the body.
- Massage and knead the muscles and soft tissues of the human body in order to provide courses of treatment for medical conditions and injuries or wellness maintenance.
- Use complementary aids, such as infrared lamps, wet compresses, ice, and whirlpool bathe in order to promote clients' recovery, relaxation and well-being.
- Treat clients in own offices, or travel to clients' offices and homes.
- Confer with other therapists, physical therapists, colleagues, and healthcare providers.

Work activities of the massage therapist include:

Massage Therapists must engage in various work activities above and beyond conducting the actual massage including maintaining documentation, problem solving, and training others. Some of these varied activities include:

- Performing for or working directly with the public.
- Assisting and caring for others.
- Performing general physical activities such as considerable use of your arms and legs and moving your whole body, such as climbing, lifting, balancing, walking, stooping and handling of materials Handling and moving objects such as using hands and arms in handling, installing, positioning, and moving materials, and manipulating things.
- Getting information by observing, receiving, and otherwise obtaining information from all relevant sources.
- Training and teaching others by identifying the educational needs of others, developing formal educational or training programs or classes, and teaching or instructing others.

¹¹ O-Net Online <http://online.onetcenter.org/link/summary/31-9011.00>

- Documenting and recording information by entering, transcribing, recording, storing, or maintaining information in written or electronic/magnetic form.
- Making decisions and solving problems by analyzing information and evaluating results to choose the best solution and solve problems.
- Thinking creatively by developing, designing, or creating new applications, ideas, relationships, systems or products, including artistic contributions.¹²

Future Trends in Massage Therapy

The needs and profile of the common massage therapy consumer are changing rapidly. Massage is no longer just an occasional luxury while on vacation, but a regular and frequent part of a person's overall healthcare regimen. Massage therapy is becoming an important adjunct to health prevention, and to the recovery and treatment of injuries, strongly rooted in physical and health improvements (as opposed to stress reduction and well-being improvements). As massage becomes an accepted treatment of chronic pain and musculoskeletal conditions, we can expect the education and skill sets required by employers and insurance companies to increase. Advanced understanding and knowledge of musculoskeletal anatomy, pathology, neuroanatomy, cranial sacral therapy, neurophysiology and nutrition will all be increasingly important to successful Massage Therapists in the future.

14% of Fortune 500 companies now offer massage as an employee benefit.

- MassageEnvy.com

Second, very few insurance companies covered massage therapy in the past, but consumer demand is encouraging more companies to add massage as a covered benefit. As a result, the profession is evolving and changing its organizational model. Massage Therapists are transitioning from sole proprietors and private practice to professional networks/groups which are better equipped to deal with changing legislation and insurance company requirements. Many therapists are finding that employment within larger practices allows them to focus on their core services and not the business/legal aspects of the field.

From an educational perspective, the old model required MT programs to include curriculum for entrepreneurship or small business development skills to prepare independent operators. However equally, or more, important in the future will be teaching massage therapy students how to be ethical, professional employees since many will go to work in hotels, medical centers, spas, physical therapy clinics, and franchise massage chains. While there will still be many that go into private practice, no longer is that the only career path for this occupation.

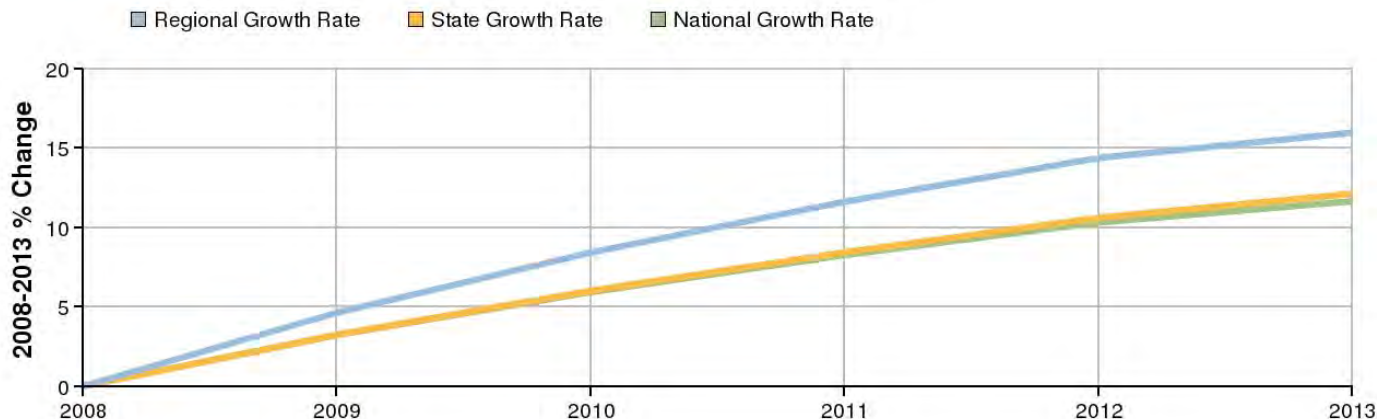
Employment Projections

The Inland Empire region's expected growth in this field is even higher than national growth projections for an expanding population of massage therapists. By 2013, the number of massage therapists is expected to grow by 16% in this region. This rate is higher than the projected 12% growth for both the state of California and the nation.¹³ Additionally, the average hourly earnings are higher in the Inland Empire than the average state or national wages.

¹² O-Net Online <http://online.onetcenter.org/link/summary/31-9011.00>

¹³ EMSI Covered Employment - Fall 2008

Exhibit 2 - Massage Therapist Occupational Summary



Region	2008 Jobs	2013 Jobs	Change	% Change	2007 Avg. Hourly Earnings
Regional Total	862	999	137	16%	\$23.61
State Total	7,382	8,277	895	12%	\$20.81
National Total	49,047	54,761	5,714	12%	\$19.39

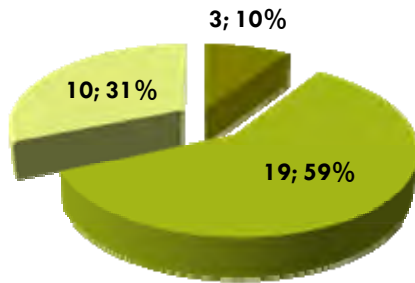
In the regional survey, employers were asked, “Do you anticipate hiring any Massage Therapists in the next 24 months?” A “yes” response was provided by 69% of the total number of respondents (as expected, the sole proprietors all answered “no” and 100% of larger employers answered “yes”). Respondents anticipate hiring 298 new MTs of which 66% will be full-time positions.¹⁴ Most employers prefer experienced massage therapists, but will hire and train if the person has the right combination of education, personality and work ethic.

Hiring Difficulty and Turnover

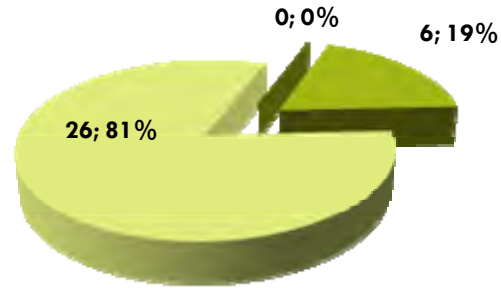
When asked about the difficulty in filling open positions, only 9% of survey responded that “it has been very difficult” and 60% found it was “somewhat difficult” to find EXPERIENCED candidates. Zero responded it is “very difficult” to find INEXPERIENCED candidates. Several employers commented that they receive calls almost daily from proprietary schools hoping to place their students and from recent massage therapy graduates looking for work. From the survey results, there does not seem to be any gap in the quantity of available massage therapists. One respondent stated, “There are perhaps too many graduates flooding the market.” Interestingly, however, another respondent commented, “It’s not that we need more schools, it’s that we need better quality.”

¹⁴ In the Massage Therapy profession, full-time varies from employer to employer, but ranges from 24 to 32 hours per week.

How difficult is it to find EXPERIENCED applicants to fill massage therapy positions?



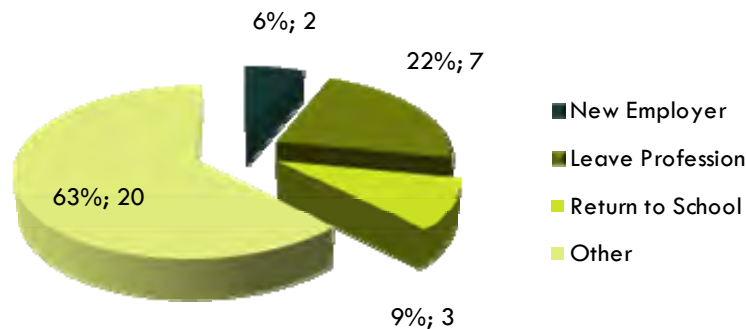
How difficult is it to find INEXPERIENCED applicants to fill massage therapy positions?



- It has been very difficult
- It has been somewhat difficult
- It has not been difficult

When calculating the occupational outlook for full-time Massage Therapists, it is important to recognize that this is not a career with traditional longevity. Survey results indicate that 60% of the massage therapists in the Inland Empire turn-over within 4 years. Only 40.5% of massage therapists remain in their positions five or more years. More detailed interviews with industry experts validated these survey results. Ms. Funk from Massage Envy estimated an average MT's career is about five years. However, she said "if they were taught and practiced proper ergonomics and self care techniques, their careers would be longer."¹⁵ Angela England, a regular contributor to Massage and Bodyworks magazine, stated, "the average length of time a beginning MT stays in business is only 3-4 years before they burn out and quit either because of emotional stress or physical injury."¹⁶ When employers answered why therapists leave, 22% said they completely leave the profession and 62% responded "other". The primary reasons listed under "other" were relocation, termination and physical burn-out. This short professional tenure is unfortunate for both the employee and the employer (especially considering the enormous debt burden caused by the high cost of their proprietary education).

What is the main reason therapists leave?



¹⁵ Executive Interview, April 9, 2009.

¹⁶ England, A. (Jan. 6, 2008). Avoiding Overwork Stress Burnout: Staying Physically and Emotionally Healthy as a Massage therapist. Suite101.com Newsletter. <http://relaxation-stress-reduction.suite101.com/>

In Massage Therapy, the replacement job phenomenon occurs reportedly at the lower end of the earned wage spectrum and the lower end of number of hours of experience in the field. Massage therapy educators have noted that practitioners with fewer hours of hands-on experience and less hours of coursework tend to be less prepared when entering the field. Subsequently, this group tends to be among those whose businesses are short lived. Without a uniform threshold standard for hours throughout the state of California, this group may become targeted for preparation programs that award a certificate after 100 to 150 hours of classroom instruction.

An additional variable undoubtedly affecting the demand for Massage Therapists is the economic recession. In order to assess how the economy has affected regional massage businesses, employers were specifically asked if they have experienced changes in their businesses due to the economic downturn. Sixty-two percent indicated the local economy has negatively affected business and 53% said there are increased holes in their schedules. Moreover, thirty-eight percent of survey respondents have increased their advertising and sales promotions. The day spa and resort businesses reported significant challenges; conversely, Massage Envy clinics have actually capitalized on the downturn. One of the Massage Envy owners said “new customers are trying us out because of the lower prices and then staying with us because of the high quality.” **In spite of the economy, not one single survey respondent anticipates reducing their MT staff in the next 12 months.**

Average Earnings

The average earnings of Massage Therapists working in California reported for the first quarter of 2008 are \$41,430. These earnings are slightly higher than the national average.¹⁷ The median hourly wages for massage therapists nationally are \$16.76 hourly or \$34,870 annually.¹⁸ This trend is supported by historical data as well. In May 2007, California massage therapists tended to have higher estimated hourly wages than those paid to massage therapists throughout the rest of the nation. The California minimum wage is \$8.00 per hour which is about \$16,000 annually.¹⁹ A living wage in the Inland Empire is estimated at \$16.50 which is about \$33,000 annually.²⁰ The median \$47,132 for projected earnings for Inland Empire massage therapists is higher than both the minimum and living wage within our region, and those working in the upper quartile can earn between \$65,977 – \$84,822 and beyond!

Comparison of Massage Therapists Wages		10%	25%	Median	75%	90%
United States	Hourly	\$7.69	\$11.18	\$16.76	\$24.74	\$34.06
	Yearly	\$16,000	\$23,300	\$34,900	\$51,500	\$70,800
California	Hourly	\$8.77	\$12.22	\$19.92	\$27.84	\$35.76
	Yearly	\$18,200	\$25,400	\$41,430	\$57,900	\$74,400
San Bernardino-Riverside	Hourly	\$10.42	\$15.11	\$22.66	\$31.72	\$40.78
	Yearly	\$21,632	\$31,428	\$47,132	\$65,977	\$84,822

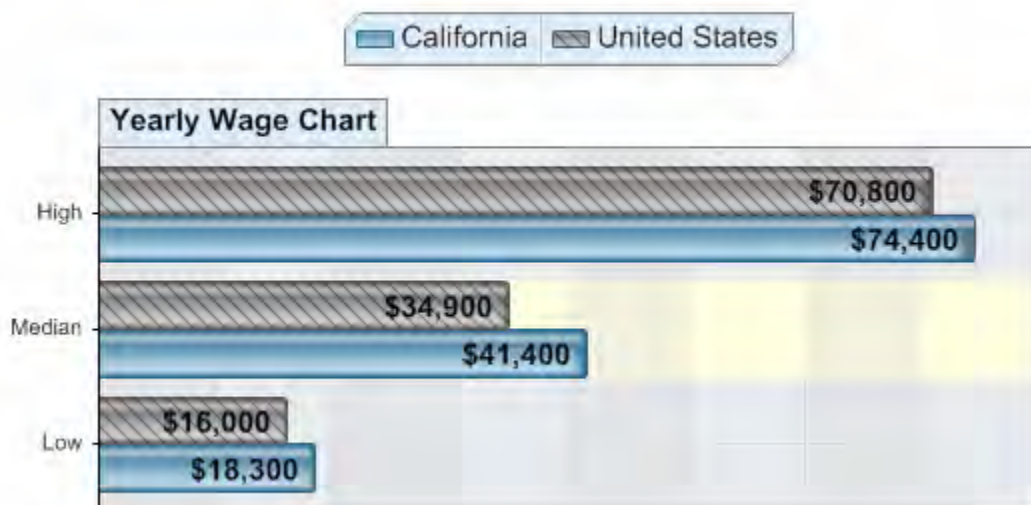
¹⁷ Massage Therapists in California <http://www.labormarketinfo.edd.ca.gov/cgi/databrowsing>

¹⁸ <http://www.careerinfonet.org/>

¹⁹ California Minimum Wage 3/17/2008

<http://www.labormarketinfo.edd.ca.gov/article.asp?ArticleId=126&SubId=&PagelD=&Visited=true>

²⁰ Calculated with San Bernardino & Riverside County representatives, and LMID, during regional Clusters of Opportunity project, 2008



- High is the wage at which 90% of workers earn less and 10% earn more.
- Middle is the wage at which 50% of workers earn less and 50% earn more.
- Low is the wage at which 10% of workers earn less and 90% earn more.

Related and Transferable Occupations: Possible Career Pathways

For a massage therapist, the most common career pathway for advancement involves preparation and transfer to the career lattice for physical therapists. Moving from aide, to assistant, and then registered physical therapist, the transfer of the massage therapist's knowledge, skills and abilities provide a broad base of experience for the move to the occupation of physical therapy. (See Appendix E for career ladder information). In the field of physical therapy, the massage therapist moves into the more rehabilitative side of the therapist's profession. Assessing, planning and participating in rehabilitative programs, the physical therapist focuses on improving the client's mobility. Working to relieve pain and increase patient strength, the physical therapist plays a more extended and active role in the health of the patient than the massage therapist.

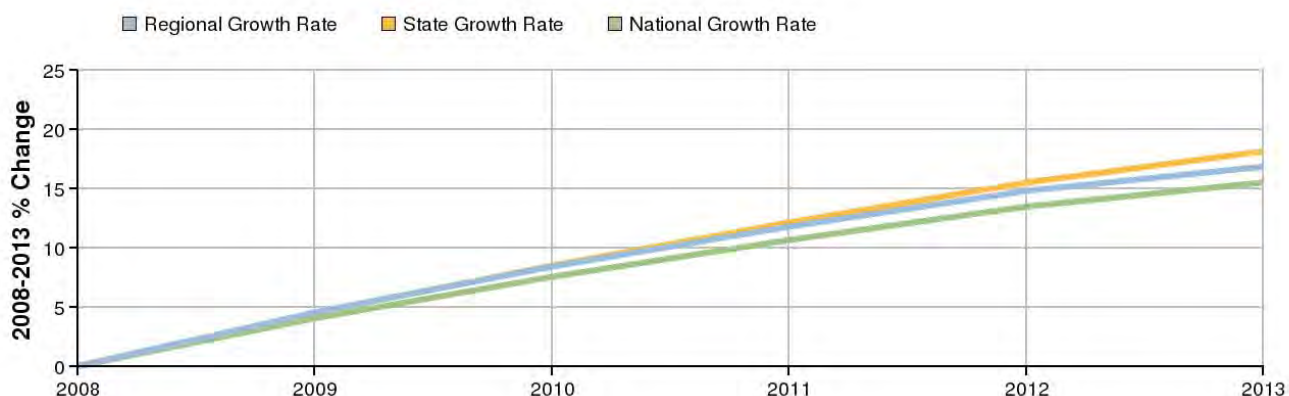
Common tasks are shared between the two occupations. Performing the initial exam, evaluating and identifying physical problems are basic to the performance of each therapist. Administering and evaluating treatment for its positive and negative value is also shared by both occupations.

Where the occupations of Massage Therapy and Physical Therapy diverge is the advanced nature of the occupation of physical therapy. As part of the allied health professions, the physical therapist interacts with the physicians treating each patient and helps develop the solution to the ailments of the patient. As part of the medical team, the physical therapist problem solves, acts to apply the solution, and then monitors and assesses the impact of the solutions on the patient's health and well-being. (See the South Central Region COE environmental scan on Physical Therapist Aides and Assistants for additional information).

For MTs that wish to advance, the employment outlook for physical therapists in California is good as the trend for employment is projected to expand by 18% through 2013. The average

hourly wage in 2007 for physical therapists was \$30.56.²¹ That is significantly higher than for the massage therapist so the opportunities for advancement in the physical therapy career ladder are not only a natural occupational move, but an economically significant move for massage therapists.

Exhibit 3 - Physical Therapists Occupational Summary



Region	2008 Jobs	2013 Jobs	Change	% Change	2007 Avg Hourly Earnings
Regional Total	2,139	2,499	360	17%	\$30.56
State Total	23,084	27,266	4,182	18%	\$30.79
National Total	276,372	319,203	42,831	15%	\$27.62

National and State Regulatory Environment

National Regulatory Environment

Nationally, 36 states and the District of Columbia have some form of regulation of massage therapy in place.²² The American Massage Therapy Association, a membership organization, favors consistent massage therapy licensure standards that encourage reciprocity between states and eventually achieve overall portability of massage therapy credentials.²³ Language, definition of terms and uniform regulation, and agreements about massage therapy and massage therapist training seem to be nearly as diverse as the 80 modalities that comprise the practice. A national certification is offered by Associated Bodywork & Massage Professionals (ABMP), which offers tiered certification levels such as “Practitioner,” which requires at least 100 hours of training; “Professional,” which requires at least 500 hours of training, but does not require continuing education, and “Certified,” which requires at least 500 hours of training or a state license and 16 hours of continuing education every two years.²⁴

Separately, the National Certification Board for Therapeutic Massage and Bodywork offers two exams for eligible applicants. Applicants must have 500 hours of instruction, but the

²¹ EMSI Covered Employment - Fall 2008

²² http://amtamassage.org/government/gr_overview.html

²³ http://amtamassage.org/government/gr_overview.html

²⁴ ABMP, <http://abmp.com/membership/index.html>

categories are more rigorous than other exams including: body systems, anatomy, physiology, kinesiology, and business and ethics. Applicants must show in their instruction 200 hours of massage and bodywork assessment, theory and application, and 40 hours of pathology. Applications must show graduation from an accredited school in their state. However, California does not currently offer these exams for certification.²⁵

State and Local Regulatory Environment

Currently, there is no required state licensing or certification of massage therapists in California which presents difficulties for both the employer and employee. Instead, local jurisdiction over the massage permitting process for businesses and individuals is generally under city or county government, and permits and licensing fees may be charged through the massage permit and zoning process.²⁶ Since each city determines the criteria for Massage Therapy licensing, this greatly constricts where a MT can work. For example, a Massage Therapist licensed in Murrieta cannot go to work in Temecula without going through the expense and cumbersome paperwork process of gaining another local license. Survey respondents mentioned it can take 3 to 6 months for licensing. This occasionally results in an inability to hire an individual because the employer couldn't wait for the person to get licensed locally.

In addition, business locations may be limited by zoning requirements and ordinances as well as subject to review and regulation by local government agency departments such as health, planning, business licensing and the police department, among others. Business owners who have actual physical locations for massage therapy must check with their local jurisdiction to determine which licensing, zoning and other requirements they must meet. Some cities require evidence of "hours" and education for massage therapists working within city limits. Most common for cities are individual background checks through the California Department of Justice. These types of individual background checks require fingerprinting and an investigation to assure that the individual being investigated possesses a clean criminal record. However, everything is changing. For example, a recent Press Enterprise article stated the Corona City Council put a 45-day moratorium on new permits for massage businesses and therapists so the city can re-evaluate and possibly tighten its rules.²⁷



In September 2008, the California governor enacted legislation that provides for the application of voluntary uniform statewide regulation of various healing arts professionals to

²⁵ www.ncbtmb.org

²⁶ <http://www.amta-ca.org/index.php?src=gendocs&ref=State%20Legislation&category=Main>

²⁷ Robinson, Alicia. (May, 11 2009). "New state law may alter Inland rules on massage businesses." The Press Enterprise.

include massage therapists. The legislation defines the title that can be used, i.e. massage therapist, but does not define what the massage therapist can do.²⁸ Thus, the law also establishes the Massage Therapy Organization, a non-profit regulatory commission, which is tasked with developing certification requirements for massage practitioners and massage therapists which go into effect fall 2009.²⁹ Although the law makes certification voluntary, the intent is to enable consumers to easily identify credible certified massage therapists and to provide assurance that certified massage therapists have completed sufficient training at approved schools.³⁰ Colleges are encouraged to track this group's process and future certification requirements.

Who's Doing What? Education's Response

Private and Proprietary Vocational Schools

In the Riverside-San Bernardino-Ontario area, currently there are seven for-profit schools that offer or will soon offer massage therapy coursework as a postsecondary and vocational education option. One such school located in the city of Riverside is Kaplan College which serves 550 students with seven different programs. One of their programs is a diploma in massage therapy. Kaplan College took over the former Maric College in a name change in September 2008.³¹ Students pay tuition, or if they qualify, they can apply for federal financial aid or other aid.³²

The Riverside Kaplan campus has a fully equipped massage therapy classroom for lectures, hands on demonstrations with graphics, instructional aids, equipment such as sinks with running water, specialized massage tables, and a large changing area. At the end of approximately ten months, students who complete the Kaplan Massage Therapy program attain 370 hours of lecture and 290 hours of lab time for 720 hours upon receipt of their diploma. The program is designed, among other things, to help eligible students prepare for the National Certification Board for Therapeutic Massage and Bodywork (NCBTMB) national certification exam.³³

A second example of a Massage Therapy program is in Ontario at the campus of United Education Institute. The massage therapy program takes nine months to complete and leads to a diploma in Massage Therapy. Students are eligible for licensure through NCBTMB. While the program "is intended primarily for students who plan to be self-employed, students do find employment in health and wellness businesses, resorts, hotels, rehabilitation and physical therapy departments."³⁴ United Education Institute encourages its enrolled students to apply for financial aid from federal, state and private sources.



These schools offer programs that range from nine months to eleven months in duration and have multiple orientations, from holistic medicine to sports therapy. Most produce students

²⁸ American Massage Therapy Association, Inc., California Chapter. http://www.amta-ca.org/clientuploads/directory/govrelations_fact1.pdf

²⁹ Robinson, Alicia. (May, 11 2009). "New state law may alter Inland rules on massage businesses." *The Press Enterprise*.

³⁰ Senate Bill 731. The Legislative Counsel's summary appears in Appendix F.

³¹ www.kaplancollege.com. <http://www.kaplanhighereducation.com>

³² Kaplan College Massage Therapy brochure, 951-276-1704. www.kc-riverside.com

³³ Kaplan College Massage Therapy brochure, 951-276-1704. www.kc-riverside.com.

³⁴ www.massageschoolsguide.com/ontario_massage_schools_ontario_ca.html

eligible to take national certification exams. However, they are not required to track success rates for successful test completion. Their tuition charges range from the low of \$12,161 to a high of \$15,000 and almost all offer financial aid for their full-time students. In spite of the high tuition cost, there were 581 program completers in the region in 2007 and 643 in 2008 according to the U.S. Department of Education.³⁵ As true with any training program, certainly not every program completer entered into the field, but given the projected demand there is clearly not a shortage of MT program completers in the region.

Local employers were asked, “From which schools/training providers do you currently prefer to hire your Massage Therapists?” Kaplan received six recommendations, Everest (Bryman) received six and American Career College received three. These were the top three schools receiving responses. Interestingly, in their survey comments, none of the respondents were particularly enthusiastic about any of the programs stating, “we do not have a preference,” “Don't have a favorite,” “anywhere,” and “any local school,” among other such comments. Typically, employers hire from the schools geographically nearest them or those that provide enough hours of hands-on training to recent graduates.

Community College Programs, Costs and Feasibility

Currently, other than Fullerton Community College, no public community college in Southern California provides Massage Therapy coursework leading to a medical or sports focus.³⁶ Unlike students in Orange and southern Los Angeles counties, the student population in the Inland Empire does not have a low-cost, high quality public education option available to them in the field of massage therapy.³⁷ (See Appendix G for a complete listing of community college massage therapy programs). Currently, students who wish to pursue massage therapy as a vocation in our region are forced to prepare for their profession through proprietary school programs. Proprietary vocational educational institutions tend to provide coursework at a higher cost to the individual student than community colleges (arguably because the cost of doing business is paid directly by students rather than shared across an entire population of taxpayer support for a state system of public education).

A three-fold enrollment growth at Fullerton Community College since the program's inception is evidence that a community college program in Massage Therapy will attract students. Most of Fullerton's enrollees come from that college's surrounding area. Fullerton students who enroll in the college's two-track program and who complete their required practicum hours in a college-sponsored community clinic can sit for a state licensing exam within 12 to 18 months from beginning the program. With passage of the exam, students can then seek employment within a clinical setting of a chiropractor's office, work within a physical therapy setting, or establish their own therapeutic massage practice—by meeting additional city, county and state rules applicable to zoning, planning, permits and licensure requirements within the city in which they will work.

³⁵ US Department of Education, National Center for Education Statistics: Integrated Postsecondary Education Data System (IPEDS). Program completions are reported using the Classification of Instructional Programs (CIP) codes.

³⁶ No Regional Occupation Program has a massage therapy program because of age requirements.

³⁷ www.cpec.ca.gov/CollegeGuide?AdvCollegeSearch.asp?CIP=513501



However, start up costs for a fully equipped classroom with specialized equipment and furniture could present a minor barrier to developing a Massage Therapy program. Although far less compared to other Allied Health program costs, community college Massage Therapy program costs similarly include qualified instructor(s) and a dedicated classroom/lab. The classroom requires massage tables for students to first learn techniques of different massage modalities complete with instructional materials, specialized furniture (massage tables), sinks, a changing area, and ongoing costs of expendable supplies such as oils for massage, drapes and gowns for clients, and running water.

Program costs may also include a daily laundry service for cloth items. The classroom setting may also serve an additional purpose as clinic where students perform supervised hands-on massage on members of the public to attain required hours of practical therapeutic massage. Using Fullerton Community College as an example, some of the required courses dovetail within curriculum offerings of Physical Education and Health Care Technologies. In this way existing faculty may already be in place to provide foundational anatomy and physiology coursework.

Specialized, experienced instructors are needed for a Massage Therapy program. These instructors may actually have higher income prospects in the practice of massage rather than a wage earned as a college instructor. However, interest in Massage Therapy has grown three-fold at Fullerton from one course in each sequence to three sections for each course sequence.³⁸ At Fullerton, WASC-certified classes are generally full, and 25 students attend each of three sections. As students progress through their course sequence at Fullerton Community College, they practice massage techniques they have learned during a weekly instructor-supervised public clinic. The clinic operated by Fullerton Community College provides hands-on supervised time where students can practice their skills on community members. Most importantly, student massage therapists accumulate hours toward a Therapeutic and Sports Massage Therapist Level I Certificate (338 hours) with 10-12 units of coursework; or towards a Massage Therapist Certificate (752 hours) with 29 to 30 units of coursework.³⁹

In addition, as students progress towards completion of their threshold hours, they also have the opportunity for placement in internships within sports and wellness businesses as well as at chiropractic offices. When students complete their coursework and hours of hands-on supervised massage therapy, they are eligible to take the national licensing test. Depending upon the city requirements for business licenses, students may need 500 supervised hours to secure a local business license as a Massage Therapist. If they have fewer supervised hours, those students may work in a physical therapy clinic under the license of the business.

³⁸ Interview with Fullerton faculty, September 25, 2008

³⁹ http://www.pe.fullcoll.edu/vocational_certificate.html

Student Benefit

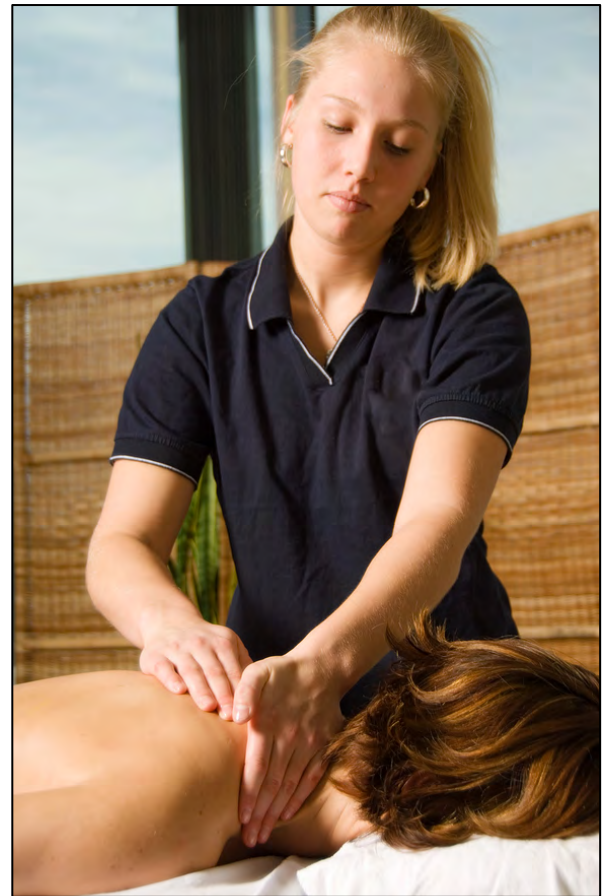
Community college coursework leading to a vocational certificate or AA degree in Massage Therapy provides exceptional financial value to the student. For example, completion of 19 to 20 units for the Therapeutic and Sports Massage Therapist Level I Certificate at Fullerton Community College costs about \$400 plus books and materials for students. Completion of a Massage Therapist Certificate for Level II costs students about \$420 plus materials. Naturally, student loans and grants are available for qualified students and the program takes about 12 to 18 months to complete depending upon the level selected by the student and the required lab time.⁴⁰ Contrasted to the lowest tuition of \$12,161 for a 9-11 month proprietary school option, the community college certificate may take a few months longer but the cost differential is significant. On average, our local residents must pay tuition costs over 25 times higher than if a community college program was available.

In addition to the financial benefit, the ability to build upon a massage therapy program and transfer those units to a 4-year university would increase the career advancement within the field.

One industry survey respondent noted that this would be of benefit, but the units obtained at private vocational schools are not transferable to 4-year institutions. This limits the career advancement possibilities for motivated massage therapists to return to college for a degree leading to a career in physical therapy or any other degree.

Program Accreditation & Regulation

Many states require formal training and national certification in order to practice massage therapy. National accreditation for massage therapy programs is provided by a few specialized professional organizations. One such accreditation is offered by the Commission on Massage Therapy Accreditation (COMTA) an independent accrediting commission of massage therapy education institutions and programs. COMTA is recognized by the U.S. Department of Education. Accreditation is a rigorous process that includes a comprehensive self-study, on-site observation by external professionals and educators, and evaluation by an independent commission. Institutional or programmatic accreditation is for a specified time period; thus, programs must apply for a new grant of accreditation. COMTA only lists three proprietary schools in California (all in San Diego County) on its accreditation roster.⁴¹



⁴⁰ http://www.pe.fullcoll.edu/vocational_certificate.html

⁴¹ <http://www.comta.org/directory.php>

Throughout California, private postsecondary schools are currently the major providers of educational and training opportunities in the field of Massage Therapy and they are currently unregulated by the state. The California Bureau for Private Postsecondary and Vocational Education used to regulate approximately 3,000 private postsecondary schools.⁴² With the new law that takes effect on September 1, 2009, the Bureau will once again be a designated regulator and the Department of Consumer Affairs has worked to encourage schools to voluntarily agree to comply with the law as it existed prior to expiration. In a news release posted to the DCA website, Carrie Lopez, Director states, "The Department of Consumer Affairs stands ready to create a new bureau to ensure effective student protections and effective regulation of private postsecondary education, and expects legislation to do so will be drafted with clear expectations and direction for schools and students so they understand their responsibilities and their rights."⁴³

Conversely, schools that are nationally accredited or programs that are at state community colleges are highly regulated. The Western Association of Schools and Colleges and the Accrediting Commission for Community and Junior Colleges and Universities (ACCJC) (collectively WASC) serve as unique and reliable authorities for establishing and maintaining standards for public and private institutions providing postsecondary education in California. For private institutions, ACSCU and ACCJC require, as one condition for eligibility for accreditation that an applicant institution first apply to and obtain approval from the Bureau of Private Postsecondary Education, thereby assuring Californians that all applicant institutions have been found by the bureau to meet the state's licensure standards prior to being considered for accreditation.⁴⁴



National Program Exemplars

Ms. Funk, Massage Envy's Vice President of Industry Relations and Product Development, has a unique perspective as to which schools are of high quality. She is in contact with 75% of the massage schools in the nation and has been a massage therapy instructor herself. During executive interviews, she was asked which schools she would recommend if the Inland Empire community college were to pattern a program after the best Massage Therapy schools in the country. She replied with Utah College of Massage Therapy, Cortiva Institute (with eleven

⁴² www.bppve.ca.gov/

⁴³ www.bppve.ca.gov/

⁴⁴ Chapter 8, Article 1. General Provisions Private Postsecondary Institutions

locations nationwide), and Ashby College in Washington (owned by Corinthian College). She also commented that National Holistic Institute (with five California locations) is “fabulous.” If a local community college does decide to develop a program, it is advisable to review and consider modeling a program after these national exemplars. In addition, reference Appendix H for suggestions from industry on content and program development suggestions.

Recommendations and Conclusions

There are pros and cons to weigh before determining if Inland Empire community colleges should develop one or more Massage Therapy programs at this time. Justifications for starting a program include:

- Students would benefit immensely if they had a low cost option providing them access to a growing field within the Health Care Support Profession as opposed to more expensive proprietary training programs
- Employment projections show a steady growth in Massage Therapy jobs for the region above the state and national projections
- A wage analysis shows regional incomes are greater than the state average, minimum wage, or regional living wage
- A career ladder exists with strong growth potential for Physical Therapists within the region
- A Massage Therapist program would likely fill to capacity and could generate additional revenue by providing discounted “student massages” similar Fullerton College’s lab program or other community colleges that offer discounted cosmetology services
- If they choose to leave the field, as 60% of new therapists do, community college program completers would have transferable units to help them in pursuing other career pathways and degrees
- Employers would benefit by having access to a pool of higher functioning Massage Therapists with advanced clinical and business skills

The main arguments for not establishing a training program for Massage Therapy include:

- The timing simply might not be right given the state’s budgetary and economic constraints
- There is not a crying demand from industry for additional massage therapists in terms of the quantity currently on the market, in fact there seems to be an oversupply of program completers
- A Massage Therapy program requires dedicated furniture and equipment that are front end costs beyond a typical lecture classroom. The program also requires purchasing ongoing supplies
- Significant confusion and barriers exist in the marketplace for licensed Massage Therapists to practice

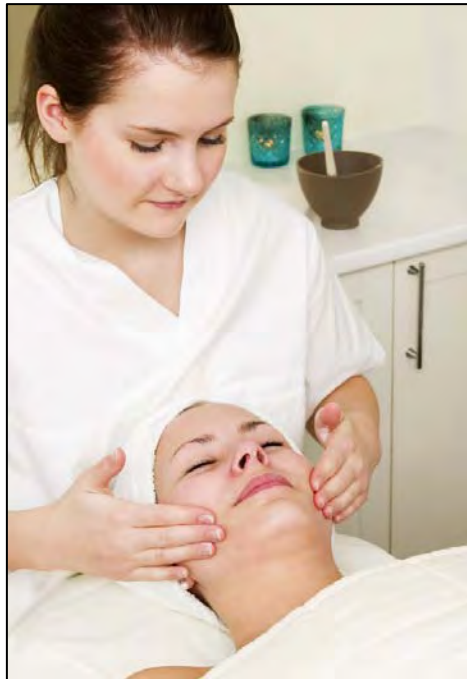
Given that prospective enrollment, viable job possibilities, high wage potential, career ladder potential, and industry growth are strong considerations for community college program development, the research indicates that an opportunity does exist for additional colleges to

develop at least one educational program in Massage Therapy within the Inland Empire providing that the significant, but not insurmountable, challenges can be addressed. Thus, the following recommendations directly relate to each challenge associated with developing a Massage Therapy program in the Inland Empire, with one additional recommendation regarding curriculum development:

1. State budgetary and economic constraints: A few regional community colleges are in an excellent position to offer the required biology, science, nutrition and related first aid curriculum by building on existing allied health programs and faculty. Thus, the overhead costs of “re-packaging” a Massage Therapy training program are reduced to the equipment and supplies. It is recommended that colleges with existing allied health programs review the list of courses in Appendix I (Fullerton College’s course listing) to see which similar courses are already offered at regional colleges.
2. Available quantity and industry demand: There is no supply gap warranting the development of multiple regional programs; however, local industry has expressed quality concerns from existing program completers which could be an opportunity for community college to better serve local employers. Ultimately, this becomes a philosophical question of quality versus quantity in alignment with each campus’ strategic plan and specific mission. Does a given community college exist to provide a high-quality, low-cost alternative to existing proprietary programs (quality), or should the community college prioritize other programs not already offered by competing institutions in their service area (quantity)? The COE recommends colleges engage in this dialog, and perhaps conduct a brief competitive analysis of proprietary schools within their service area, to identify whether local residents would be better served by a community college sponsored program.
3. Cost of furniture, equipment and supplies: Resources need to be identified for dedicated classroom/lab equipment through grants, partnerships with healthcare programs, and/or industry donations in the community. Community college leadership must evaluate the possibility of leveraging existing equipment, courses, and faculty resources already in place as they would in establishing any new program.
4. Licensure and certification challenges: It is recommended that community college leadership take a proactive response to convene educators from public and private schools, legislators, local leaders and professional massage therapy accreditation agencies for an outcome-focused discussion of the tangle of requirements surrounding Massage Therapy as a profession. Together, public and private school educators, regulators, certifiers and professional groups could address state licensure, certification, city, and county regulations for the benefit of our students and this growing profession.
5. Creating two Paths for the Entrepreneur or the Employee: Relatively low professional survival rates for Massage Therapists beyond four years could indicate a business education component might be an additional educational supporting factor to increase success rates of graduates. It is here that there might be an additional educational niche for community colleges to develop/integrate courses that would provide additional support for entrepreneurship or small business success. However, many Massage Therapists are transitioning from sole proprietorships to larger businesses which are better equipped to deal with changing legislation and insurance company requirements. Thus, since many program completers will go to work in hotels, spas, and franchise massage chains, including courses focusing on ethics, employability skills, insurance/law, self care

techniques, and management may be of competing value. MT programs should include course options for students in either career pathway.

For the Inland Empire region, the benefits to establishing a Massage Therapy program to better serve the local communities seem to outweigh the arguments for not responding to this opportunity. The employment projections, wage analysis, student benefit, career pathway potential, and student demand clearly exist for justifying a publicly sponsored Massage Therapy program. The challenges are real, but not insurmountable providing that dedicated, committed professionals take the charge and work collaboratively for the sole benefit of the communities they serve.



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Appendix A: How to Utilize this Report

This report is designed to provide current industry data to:

- Define potential strategic opportunities relative to an industry's emerging trends and workforce needs;
- Influence and inform local college program planning and resource development;
- Promote a future-oriented and market responsive way of thinking among stakeholders; and,
- Assist faculty, Economic Development and CTE administrators, and Community and Contract Education programs in connecting with industry partners.

The information in this report has been validated by employers and also includes a listing of what programs are already being offered by colleges to address those workforce needs. In some instances, the labor market information and industry validation will suggest that colleges might not want to begin or add programs, thereby avoiding needless replication and low enrollments.

About the Centers of Excellence

The Centers of Excellence (COE), in partnership with business and industry, deliver regional workforce research customized for community college decision making and resource development. This information has proven valuable to colleges in beginning, revising, or updating economic development and Career Technical Education (CTE) programs, strengthening grant applications, assisting in the accreditation process, and in supporting strategic planning efforts.

The Centers of Excellence Initiative is funded in part by the Chancellor's Office, California Community Colleges, Economic and Workforce Development Program. The total grant amount (grant number 08-305-013 for \$205,000) represents funding for multiple projects and written reports through the Center of Excellence. The Centers aspire to be the premier source of regional economic and workforce information and insight for California's community colleges.

More information about the Centers of Excellence is available at www.coecc.net.

Important Disclaimer

All representations included in this report have been produced from primary research and/or secondary review of publicly and/or privately available data and/or research reports. Efforts have been made to qualify and validate the accuracy of the data and the reported findings; however, neither the Centers of Excellence, COE host District, nor California Community Colleges Chancellor's Office are responsible for applications or decisions made by recipient community colleges or their representatives based upon components or recommendations contained in this study.

Appendix B: Inland Empire Massage Therapist Survey Questions & Results

MASSAGE THERAPY		
How many massage therapists does your business employ? (Enter 0 if none)	Full Time 253 Part Time 194 Total 447	
Do you anticipate hiring any massage therapists in the next 24 months?	Yes 67% (22) No 33% (10)	
How many Massage Therapists do you plan to hire?	298	
How many will be employed as: (If none, enter 0)	Full Time 150 Part Time 106	
How difficult is it to find EXPERIENCED applicants to fill massage therapy positions?	It has been very difficult It has been somewhat difficult It has not been difficult	9% (3) 59% (19) 31% (10)
How difficult is it to find INEXPERIENCED applicants to fill massage therapy positions?	It has been very difficult It has been somewhat difficult It has not been difficult	0% (0) 19% (6) 81% (26)
Do you anticipate reducing your massage therapy staff in the next 12 months?	Yes 0% No 100% (32)	
What is the average "life expectancy" of a massage therapist in your organization?	0 – 2 years 3 – 4 years 5 years plus	18% (6) 41% (13) 41% (13)
What is the main reason therapists leave?	New Employer Leave Profession Return to School Other (please specify)	6% (2) 22% (7) 9% (3) 62% (20)
Have you experienced any of the following changes in your business due to the economic downturn: (Reminder: Your individual responses will be kept confidential: only aggregated data will be presented in our report.)		
The local economy has negatively affected my business.	True 62% (20) False 38% (12)	
Are there increased holes in your schedule?	Yes 53% (17) No 47% (15)	
Are you advertising more?	Yes 38% (12) No 53% (17) N/A 9% (3)	
SPA MANAGEMENT		
How difficult is it to find EXPERIENCED applicants to fill spa management positions?	It has been very difficult It has been somewhat difficult It has not been difficult Not Applicable	9% (3) 25% (8) 9% (3) 56% (18)

How difficult is it to find INEXPERIENCED applicants to fill spa management positions?	It has been very difficult It has been somewhat difficult It has not been difficult Not Applicable	3% (1) 6% (2) 25% (8) 66% (21)
SKILLS		
Overall, are your Massage Therapist job applicants lacking important job skills?	Yes 31% (10) No 69% (22)	
What job skills do you feel they are lacking? (Check all that apply)	English Language Reading Written Communication Basic Math Spelling Employability skills (work ethic attendance, resume) Clinical Skills Self Care Other	20% (2) 10% (1) 20% (2) 20% (2) 20% (2) 50% (5) 50% (5) 30% (3) 60% (6)
What new massage therapy programs, services, or trainings (if any) should local colleges and universities develop in order to better serve your needs?	See Appendix H	
From which schools/training providers do you currently prefer to hire your massage therapists?	No preference (11) Kaplan (6), Everest (5), American Career College (3), Soma Therapy (3), Milan Institute (2), and one each for: Healing Hands, CNI, Utah College of MT, SBCC, School of Holistic Touch, and Bryman.	

Additional Comments (organized into themes):

Need a MT program

An affordable program with very high standards of instruction is needed in our area!

It would be nice to have a program where MTs can continue their education toward a degree.

If you add a MT program, go deeper than here's how to do a Swedish Massage. Make sure they understand that people are getting massage as therapy, not just relaxation.

Do not need a new MT program

Its not that we need more schools, its that we need better quality in the schools that exist.

At this time I get applicants everyday. I feel like there are not as many jobs as there are applicants.

This valley is saturated with massage schools

No

Our office receives numerous calls, sometimes daily, from people looking for a massage position. Maric College phones us to ask if we have any vacancies for their students. The present economic climate has increased the calls but even in good times we received many inquiries which has led me to believe that there are perhaps too many graduates flooding the market.

Specific Programs/Continuing education:

We have had a challenge with therapists that don't have adequate training in reflexology. It would be helpful to offer a full course on this subject. Thai massage is another area that would be helpful.

Add Sales Training. The sales of retail products and repeat business through treatment plans is the best way to ensure repeat customers. Understanding "why" customers need the products and treatments and how it will help them over the long term. and the "harms" if they don't follow the course of treatment. Also, in depth business training: how to do pre-booking, client retention, Retail \$ per service and how it all equates to an individual therapist's income.

Training needs to include the optimum client experience from beginning to end.

More on the business. New therapists come out of school with expectations that are way too high. They think they'll come out of school and have a clientele and a bunch of money. They don't have a clue what's involved in building up their business. (Even if they are employed by someone else)

Other:

Community colleges should invest in a PTA (Physical Therapy Assistant) program

Need to teach realistic expectations when it comes to compensation in the business world for massage therapists. In order to be a successful therapist one must truly enjoy the profession and not just the compensation aspect of it. Also, the expectation of compensation tends to be unrealistic when compared to reality.

Working weekends and nights is essential to business since most of our clients work during the weekdays. We try to maintain standardized schedules but, we do make changes to accommodate our business needs as they evolve.

College of the Desert had someone shadow me for a spa manager job. They seemed to be starting a program. I would like to teach in such a program. One of the proprietary schools was going to start a program and went out of business before it got off the ground.

Thank you

Training needs to include how to work in a resort. Things like advanced customer service, more pampering. They're shocked when they come to a resort from a regular day spa.

Licensing in Riverside County takes too long and I've had to pass on hiring some new therapists because of the wait

Appendix C: EMSI Data Source and Calculations

State Data Sources

EMSI uses state data from the California Labor Market Information Department.

Industry Projections Data

In order to capture a complete picture of industry employment, EMSI basically combines covered employment data from Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with total employment data in Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA), augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES) published by the U.S. Census Bureau. Projections are based on the latest available EMSI industry data combined with past trends in each industry and the industry growth rates in national projections (Bureau of Labor Statistics) and states' own projections, where available.

Occupational Projections Data

Organizing regional employment information by occupation provides a workforce-oriented view of the regional economy. EMSI's occupation data are based on EMSI's industry data and regional staffing patterns taken from the Occupational Employment Statistics program (U.S. Bureau of Labor Statistics). Wage information is partially derived from the American Community Survey. The occupation-to-program (SOC-to-CIP) crosswalk is based on one from the U.S. Department of Education, with customizations by EMSI.

Educational Attainment Data

EMSI's educational attainment numbers are based on Census 1990, Census 2000, the Current Population Survey, and EMSI's demographic data. By combining these sources, EMSI interpolates for missing years and projects data at the county level. Educational attainment data cover only the population aged 25 years or more and indicate the highest level achieved.

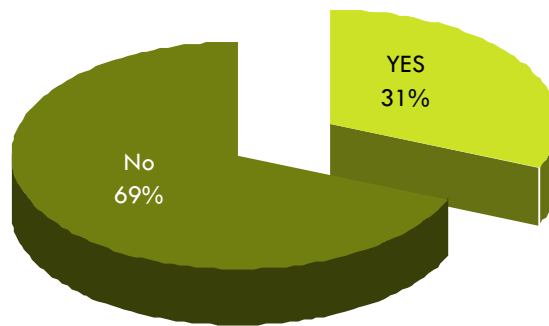
Economic Modeling Specialists, Inc.
<http://www.economicmodeling.com/>

Appendix D: Deficient Skills

A survey question asked, “Overall, are your Massage Therapy job applicants lacking important job skills?”

Sixty-nine percent said “no” and 31% said “yes”. A check box of skills was provided. The top items checked were Employability skills and clinical skills. Six employers checked “other” and included comments about a lack of professionalism, customer service, interviewing skills and retail experience.

Overall, are your Massage Therapist job applicants lacking important job skills?



Entry Level Skills Found Lacking (check all that apply)

Skill	# of Respondents	Percentage
English Language	2	20%
Reading	1	10%
Written Communication	2	20%
Basic Math	2	20%
Spelling	2	20%
Employability Skills (work ethic, attendance, resume)	5	50%
Clinical Skills	5	50%
Self Care	3	30%
Other	6	60%

Appendix E: Massage Therapist Career Pathway

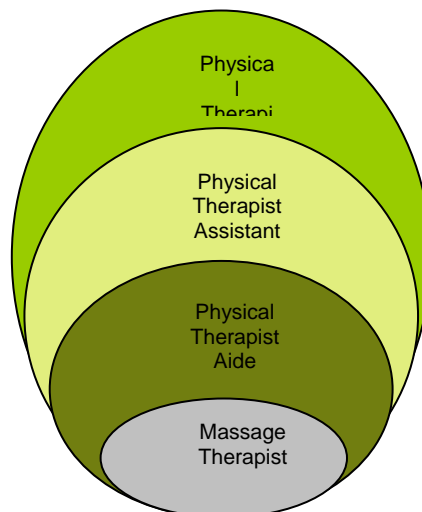
Massage is a profession in which the practitioner applies manual techniques, and may apply adjunctive therapies, with the intention of positively affecting the health and well-being of the client. Massage therapists may be independent contractors, sole practitioners, or employees. Some travel to clients' homes or to business offices.

Minimum entry-level standards for massage therapy training vary greatly, based on state or local requirements, professional association standards, or insurance requirements. State regulatory requirements for massage practice range from a minimum of 300 in-class hours at a recognized massage school to 1,000 in-class hours of massage training in an accredited massage program.

The Commission on Massage Therapy Accreditation (COMTA) is recognized by the US Department of Education as a specialized accrediting agency for massage therapy and bodywork programs and institutions. It is the only recognized accrediting agency focused solely on the quality of education massage therapy. Massage schools and programs may voluntarily seek accreditation by COMTA or may choose some other accreditation or none at all. COMTA accredits massage programs and institutions that offer a minimum training of 600 hours of classroom and clinical instruction, conducted or directly supervised by qualified faculty. The ATMA requires its members to have minimum training of 500 hours of classroom instruction and recommends training at a school accredited by the COMTA.

Currently only Fullerton College, near the western end of the Inland Empire, offers a massage therapist program amongst Southern California community colleges.

At this time, a career pathway for a Massage Therapist moves primarily through the physical therapy field.



Appendix F: Senate Bill No. 731

Senate Bill No. 731

CHAPTER 384

An act to add and repeal Chapter 10.5 (commencing with Section 4600) of Division 2 of the Business and Professions Code, relating to massage therapy.

[Approved by Governor September 27, 2008. Filed with Secretary of State September 27, 2008.]

Legislative Counsel Digest

SB 731, Oropeza. Massage therapy.

Existing law provides for the regulation of various healing arts professionals, including physicians and surgeons, chiropractors, physical therapists, and acupuncturists. Existing law authorizes the legislative body of a city or county to enact ordinances providing for the licensing and regulation of the business of massage when carried on within the city or county.

This bill would, commencing September 1, 2009, provide for the certification of massage practitioners and massage therapists by the Massage Therapy Organization, which would be a nonprofit organization meeting specified requirements, and would impose certain duties on the organization. The bill would require applicants for certification to be 18 years of age or older, to meet specified educational criteria, to provide to the organization and update certain information, to provide fingerprints for submission to the Department of Justice for a criminal background check, and to pay fees required by the organization. The bill would require the Department of Justice to review specified information and to provide to the organization fitness determinations and certain other information. The bill would allow the organization to take certain disciplinary action against certificate holders and would require the organization to take certain action with regard to suspending or revoking a certificate if the certificate holder has been arrested for, and charged with, specified crimes. The bill would make it an unfair business practice for a person to state, advertise, or represent that he or she is certified or licensed by a governmental agency as a massage therapist or practitioner, or to make other false representations, as specified. The bill would prohibit a city, county, or city and county from enacting certain ordinances regulating the practice of massage by a certificate holder, as specified. The bill would make its provisions subject to review by the Joint Committee on Boards, Commissions, and Consumer Protection. The bill would repeal these provisions on January 1, 2016.

SECTION 1. It is the intent of this act to create a voluntary certification for the massage therapy profession that will enable consumers to easily identify credible certified massage therapists; assure that certified massage therapists have completed sufficient training at approved schools; phase in increased education and training standards consistent with other states; assure that massage therapy can no longer be used as a subterfuge to violate subdivision (a) or (b) of Section 647 of the Penal Code; and to provide a self-funded nonprofit oversight body to approve certification and education requirements for massage therapists.

SEC. 2. Chapter 10.5 (commencing with Section 4600) is added to Division 2 of the Business and Professions Code, to read:

Chapter 10.5. Massage Therapists

4600. As used in this chapter, the following terms shall have the following meanings:

(a) "Approved school" or "approved massage school" means a facility that meets minimum standards for training and curriculum in massage and related subjects and that is approved by any of the following:

(1) The Bureau for Private Postsecondary and Vocational Education pursuant to former Section 94739 of the Education Code prior to July 1, 2007, and as of the date on which an applicant met the requirements of paragraph (2) of subdivision (b) or subparagraph (A) of paragraph (2) of subdivision (c) of Section 4601.

(2) The Department of Consumer Affairs.

(3) An institution accredited by the Accrediting Commission for Senior Colleges and Universities or the Accrediting Commission for Community and Junior Colleges of the Western Association of Schools and Colleges and that is one of the following:

(A) A public institution.

(B) An institution incorporated and lawfully operating as a nonprofit public benefit corporation pursuant to Part 2 (commencing with Section 5110) of Division 2 of Title 1 of the Corporations Code, and that is not managed by any entity for profit.

(C) A for-profit institution.

(D) An institution that does not meet all of the criteria in subparagraph (B) that is incorporated and lawfully operating as a nonprofit public benefit corporation pursuant to Part 2 (commencing with Section 5110) of Division 2 of Title 1 of the Corporations Code, that has been in continuous operation since April 15, 1997, and that is not managed by any entity for profit.

(4) A college or university of the state higher education system, as defined in Section 100850 of the Education Code.

Appendix G: CA Community Colleges Offering Programs in Massage Therapy⁴⁵

College	Web-site	Program	Degree Offered	Program Description/Comments
DeAnza College	www.deanza.edu	Massage Therapy	Certificate of Achievement: 25.5 units or 516 hrs Certificate of Proficiency: 44.5 units or 876 hrs Associate Degree (A.A.): or 1020 hrs	De Anza College is one of only two community colleges in Northern California to offer a Massage Therapy Program. The program at De Anza is based upon the medical model, which requires comprehensive knowledge of anatomy and physiology. The Associate Degree and hands on hours takes about two years to complete. ⁴⁶
Fullerton College	www.pe.fullcoll.edu	Physical Education Massage Therapy (Vocational Education Certificates)	Therapeutic and Sports Massage Therapist Level I Certificate; 19-20 units; 408 hrs Massage Technical Certificate II; 18 or 22 units; 850 hrs	The Physical Education Department at Fullerton Community College offers coursework leading to Therapeutic and Sports Massage Therapist Level I Certificate Program. The program also includes Massage Therapy Skills Lab evenings for hands-on learning for students to have clinically supervised hours of massage towards their required hours for either a Level I or Level II certificates. ⁴⁷
Monterey Peninsula College	www.mpc.edu	Massage Therapy	Massage Practitioner Certificate: 338 hrs. 10-12 units; 6 to 12 months Massage Therapist Certificate 29-30 units; 752-912 hrs Associate Science degree in Massage Therapy; 60 units; 752-912 hrs.	Massage Therapy program at Monterey Peninsula College began in 1994. This college is another of the two community colleges serving Northern California. The program also includes Massage Therapy Skills Lab during afternoons and evenings for hands-on learning. ⁴⁸
West Valley College	www.westvalley.edu	Health Care Technologies	Certificate of Achievement: 20 units for completion in 3 semesters	The Massage Therapy Program prepares students with the theory, knowledge, and hands-on experience necessary for an entry-level position as a massage therapist. Students learn basic massage techniques and an internship is suggested. ⁴⁹

⁴⁵ <http://www.cpecc.ca.gov/CollegeGuide/AdvCollegeSearch.asp?CIP=513501>

⁴⁶ <http://deanza.fhda.edu/workforceed/07massage.html>

⁴⁷ http://www.pe.fullcoll.edu/vocational_certificate.html

⁴⁸ <http://www.mpc.edu/academics/physicaleducation/MassageTherapyProgram>

⁴⁹ www.westvalley.edu/careers/reqmassage.html

Appendix H: Industry Suggestions for Program Development

An open ended survey question gave employers the opportunity to pass along their individual ideas for curriculum content by asking, “What new massage therapy programs (if any) should local colleges and universities develop in order to better serve your needs?” A complete list of their comments are provided below, however they basically fell into four broad categories:

- Business Skills
- Clinical Skills
- Employability Skills (especially customer service)
- Other

In brief, employers would like to see a consistent, science-based program, heavily weighted toward therapeutic massage and two to three times the number of clinical hours required. According to the PE article, when the process of writing the new certification law started, there were over 220 schools teaching massage in CA, the vast majority were proprietary schools offering 100-200 hour programs. Respondents indicated they would prefer 500 to 750 hour programs. In addition, they want to see more sales and service training, so new MTs will understand how to develop and maintain a satisfied client base. Finally, employers want MTs to have far more understanding about their profession and how it contributes to the growth and success of the overall massage therapy industry.

Specific comments from the COE Industry Survey:

Massage Business

- We are a training facility and realize that we need to be able to bill insurances since the community wants to hang on to their money.
- Some business background, hospitality training would be great.
- Business skills/being in business for yourself
- Spa Business 101 so that treatment staff can better understand the nature of the business operations/accounting/etc
- A cc training program would have a set core curriculum and science based teaching. My beef w/ prop. schools is the teaching changes according to the likes/dislikes of the instructor. Also, there's no logical progression. Students enter at whatever module the school is teaching, could be anything. Also, they need to understand the business they're in. How things are different if you're an independent contractor or employee. Also, need at least 720 hours.
- Business relations and common sense professionalism
- More on the business of massage, like building a clientele, customer service etc.

Massage Techniques/Clinical Education

- Hot stone, pre-natal, deep tissue
- Regular massage training. Community colleges might have more control over science based theory versus instructor's individual preferences and ideas.
- Schools need to provide much more training on deep tissue and therapeutic techniques. Also, many therapists need additional accredited hours to fulfill the states requirement of 500 hours and they need that education at affordable prices and convenient times so they can keep working.

- Students need more real clinical time. Massaging family and friends does not prepare them for the REAL world.
- There is a need to provide specific training to address sports/job/pre-natal conditions. There also seems to be a need for more instruction on the importance of maintaining good physical/mental/emotional health for themselves in order to succeed in the massage therapy profession.
- At least 700 hours actual hands on and more training about muscle anatomy, physiology, pathology and treatment. Need to know basic physical therapy like stretches, using heat and ice etc.
- A Complete Routine. It seems like they know technique but can't put the flow together.
- More specific training, the teachers bounce around on different subjects they need to focus on what the demand is.
- Other modalities that are up and coming in the spa realm. More emphasis on how to identify when a guest is inappropriate. Proper draping procedures. Professionalism
- Deep soft-tissue therapy
- Body treatments like wraps, scrubs, etc. Also, advanced massage treatments to help the client maintain after massage.
- More in depth training on traditional massage i.e. deep tissue, shiatsu. Also, specialty like pregnancy, infant, sports
- Body ergonomics, CEUs,

Customer Service

- Not only is the ability to give a good massage important but, it's essential for the therapist to communicate & educate the client on how massage improves their particular ailment and overall health.
- Our Massage Envy brand is very important to us and therefore, therapists must understand that they must be a "professional" not only in their work life but, also in their personal life. Who they are as a person ultimately transcends into the workplace.
- I have always wanted to do a class on spa etiquette. How to speak to a spa guest,- choosing the proper verbiage-attention to detail-comfort levels-talking too much to guest...I have a list
- Professionalism, ethics, realistic expectations.
- Resort training, customer service

Other

- There are at least 3 massage schools here in the Palm Springs valley and I taught at Kaplan and we can't find jobs for 50% of the graduating classes.
- Receptionist training. I've hired 7 in the past 6 months. The job is extremely hard. When I interview, I spend 45 minutes telling them what a terrible job it is. They are unprepared. Also, spa management training.
- A massage program in the cc's would have more credibility for the MT and the school and would be affordable
- Murrieta/Temecula is lacking service, otherwise the rest of the County is well served

Appendix I: Fullerton College Massage Therapy Course Descriptions

BIOL 102 F Human Biology (3)

Three hours lecture and discussion per week. Integrated lectures, discussions and films are designed to study modern biological concepts presented in human context. The concepts include biological chemistry, cellular basis of life, energetics, cell cycle, anatomy, physiology, reproduction, development, genetics, demography, ecology and evolution. Included in the course are discussions of current topics on environmental, nutritional and public health issues as they relate to the human condition. (CSU) (Degree credit) AA GE, CSU GE, IGETC

BIOL 102 LF Human Biology (1)

Three hours lab per week. This laboratory supplements the BIOL 102 F Human Biology lecture. This is a general education course for non biology majors providing direct participation in experiments, demonstrations and discussions. Topics include: elements of human anatomy and physiology, fitness, nutrition, disease, elements of human heredity and environmental adaptations. (CSU) (Degree credit) CSU GE, IGETC

BUS 180 F Small Business Management (3)

Three hours lecture per week. This course studies various small business enterprises including retail, wholesale, manufacturing, service, and home-based business. Factors in business success and advantages and disadvantages of business ownership are analyzed. This course covers the problems encountered in organizing and operating a small business, including financial sources, accounting information, marketing and other related information. (CSU) (Degree credit)

NUTR 210 F Human Nutrition (3)

Three hours lecture per week. This course is an introduction to the science of nutrition. Major principles, functions and sources of nutrients, as well as chemistry, physiology and wellness as they relate to nutrition are discussed. Application of nutrition of today's lifestyles is stressed; students will analyze their own eating and food intake. This course is transferable to most universities and satisfies the Fullerton College natural science requirement for graduation. (CSU) (US) (Degree credit) AA GE, CSU GE

PE 235 F First Aid, CPR and Safety Education (2)

Two hours lecture per week. This course clarifies when and how to call for emergency medical help, eliminating the confusion that is frequently a factor in an emergency. This course also emphasizes the importance of a safe, healthy lifestyle. The American Red Cross instructional outline will be followed. Upon successful completion the students will be certified in both Standard First Aid and CPR. (CSU) (UC Credit Limitation) (Degree credit)

WELL 110 F Pathology: The Massage Connection (3)

Three hours lecture per week. This course is designed to meet the specific needs of massage therapy students and professional interested in pathology. This course includes topics such as pain, inflammation and healing, and pathology associated with each of the systems. This class is part of the Physical Education's Therapeutic and Sports Massage: Massage Therapist Program. (CSU) (Degree credit)

WELL 119 F Applied Biomechanics (2)

Two hours lecture per week. This interactive and informative course takes an in-depth look at the kinesiology and functional actions of the torso, legs, and upper body musculature as it applies to exercise. Students will learn the proper postural stabilization techniques, selective recruitment patterns and progressive resistance that influences overall body alignment along

with practical implications of bones, joints, muscles, nerves, and muscle actions in developing structurally sound exercise programs. (CSU) (Degree credit)

WELL 230 F The Body-Mind Connection (3)

Three hours lecture per week. Body-mind health refers to the integration of the mind (our thoughts, attitudes and emotions) and the body, and to their impact on our overall health and well being. Body-mind health encompasses all aspects of our lives; physical, mental, emotional, and spiritual. (CSU) (Degree credit) CSU GE

WELL 232 F Introduction to Massage (4)

Four hours lecture per week. This course is the foundation for the entire Therapeutic and Sports Massage Program. It gives the students theoretical, practical and professional experience in massage therapy. The student will master a solid core of skills, body mechanics, client assessment and centering skills. The students will learn to give and receive a full body relaxation massage. (CSU) (Degree credit)

WELL 233 F Intermediate Massage (4) Advisory: WELL 238 F

Three hours lecture per week. This course focuses on massage applications with therapeutic and rehabilitative techniques. Students will learn therapeutic techniques that can maximize the efficiency of their work. Applications introduced include deep tissue, postural realignment, craniosacral motion and aromatherapy. Special attention is given to palpatory skills. (CSU) (Degree credit)

WELL 234 F Advanced Massage (4) Advisory: WELL 238 F

Three hours lecture per week. This hands-on course explores a variety of techniques appropriate to a spa setting. This course is designed to enhance the skills of massage students who have already completed the basic and intermediate massage courses. Methods and procedures of advanced soft tissue techniques and related topics; an integration of techniques practiced in intermediate massage. (CSU) (Degree credit)

WELL 236 F Sports Massage (3)

Three hours lecture per week. This course will offer the basic principles of sports massage. This course will give the student working knowledge of athletes' needs and emphasizes preventive and post-event massage. (CSU) (Degree credit)

WELL 238 F Massage and Bodywork Lab (2) Advisory: WELL 232 F, WELL 236 F

One hour lecture and three hours lab per week. This course offers students the practical experience of giving a professional massage. This lab experience develops student confidence and professional massage skills while working with the public under supervision of instructor. Course may be taken three times for credit. (CSU) (Degree credit)

WELL 239 F Internship Massage and Bodywork (1-4) Prerequisite: WELL 233 F, WELL 234 F

One hour lecture and three hours lab per week. Students apply their knowledge and skills working directly with the public in supervised settings. Students independently perform field work under supervision in various setting (i.e., community agencies, with athletic teams, spas, chiropractors or healthcare facilities). Students are required to complete four units for the Therapeutic and Sports Massage Certificate. Course may be taken four times for a maximum of eight units. credit. (CSU) (Degree credit)

For additional information on Fullerton College's program, visit:
<http://massage.fullcoll.edu/index.html>