Santa Barbara City College: School of Extended Learning

Economic and Workforce Gap Analysis for Adult Education Students

2019

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Santa Barbara City College Service Area

North	Central	South
Goleta, Santa Barbara 93105, 93117	Santa Barbara 93106, 93110, 93111, 93109, 93101, 93103	Carpinteria, Montecito, Summerland 93013, 93014, 93067, 93150, 93108

EXECUTIVE SUMMARY

ACKNOWLEDGEMENTS

INTRODUCTION

BW Research was contracted by the Santa Barbara City College, School of Extended Learning (SEL) to develop a comprehensive profile of the Santa Barbara City College (SBCC) service region. This research will allow stakeholders to better understand the underlying drivers, trends, and conditions that factor into the dynamic between current students as job applicants and regional employers as well as illuminating the interests, reservations, and aspirations of potential students in the SBCC service area.

This research seeks to achieve several objectives:

- Develop a profile of the SBCC region's underlying population and employment dynamics to better understand what and where adult education services are most needed.

- Leverage survey responses from regional employers and secondary data sources, examine the region's industry clusters, career pathways, and employment prospects to better determine the region's workforce needs and subsequently identify programming that will allow SEL students to achieve gainful employment in the region.

- Analyze survey data from current and potential students and highlight key areas where trainings and employer requirements are aligned and misaligned. A gap analysis further designates regions where there are high populations of potential students and relatively less access to trainings and programs.

WHAT WE LEARNED FROM THE PHASE I ANALYSIS

The following key findings from the demographic and economic profile research, include;

Overall Employment

1. **Since 2010, jobs within the SBCC region have grown at a slower rate than state and national averages.** The state of California's job growth of 19% between 2010-2018 is greater than the national rate (13%) and the employment growth rate of 12% in the SBCC region over the same time period.

Population

1. **The SBCC service region has a high percentage of college-educated individuals.** The percentage of those attending some college and obtaining no degree or obtaining an Associate degree or higher are greater than the state and national averages. Rates of those who have a high school diploma or less are lower than state and national averages.

2. **The Central sub-region's population is relatively less-educated than the other sub-regions.** The percentage of the population obtaining less than a high school diploma is 2-7 percentage points greater than the North and South sub-regions in the service region. Sub-regions are defined on page 1 of this report.

3. **The SBCC region has a higher proportion of higher-income individuals and a lower proportion of those earning lower incomes than the state and national averages.**   The percentage of those who earn $150,000 or more a year in the South sub-region is at least nine percentage points higher than the other two sub-regions. Conversely, the North sub-region has a higher percentage of those that earn less than $15,000 per year but the large college-attending population likely plays a role in this.

4. **The North sub-region has a higher percentage of those who live in poverty (18%) than the state (15%) and national averages (15%).** The Central and South sub-regions (12% and 7% respectively) poverty rates are both lower the state and national averages. Furthermore, this metric is an under-estimation of those living in financial distress given the relatively high cost of living in the SBCC region.

Job Quality

1. **Tier 1 jobs (high-skill, high-wage employment) have grown the most (16%) between 2010-2018.** A large increase in high-skill and high-wage jobs can have tremendous impact on the local economy. Tier 3 jobs grew by 13% and Tier 2 jobs grew 7% during this same time period.

2. **The SBCC service region has a large proportion of Tier 3 jobs compared to state and national averages.** 51% of jobs in the SBCC region are tier 3 compared to 47% and 46% of the state and national averages. This suggests a greater portion of the region's residents may struggle to make ends meet—particularly when factoring in the higher-than-average cost of living.

The Key findings from the **potential adult education population segment** analysis include:

Basic Skills

1. **The Central sub-region has the greatest population of adults who have not obtained a high school diploma or equivalent.** Specifically, the zip code 93101 in Santa Barbara has the largest population, with over 5,200 of these individuals.

ESL
1. **The zip codes 93117 and 93101 near Goleta and Santa Barbara, respectively, have the highest populations of potential ESL students--- adults who speak English less than very well.** These two zip codes have more than 13,000 potential students combined.

Older Adults (adults 55 years old and older and in the labor force)
1. **The North sub-region has the largest population of older adults who are still in the workforce.** Between the zip codes of 93117 and 93105, there are over 8,000 potential older worker adult education students in this region.

Adults with Disabilities
1. **The zip codes 93117 near Goleta and 93101 in Santa Barbara have the largest populations of adults between the ages of 18-64 with a disability.** Between these two zip codes, there are nearly 4,000 adults with a disability.

Families with pre-kindergarten age children
1. **The North sub-region has a relatively high number of families with children under the age of 7.** In particular, the zip codes 93117 and 93105 have more than 2,100 families with pre-kindergarten children. The zip code 93101, in Santa Barbara, has over 1,200 families with young children.

Challenges to the Santa Barbara City College (SBCC) Service region

1. There is a large discrepancy between the number of SBCC region residents who work within management, business, science, and arts occupations and the number of those occupations within the SBCC region. A large proportion of those living in the SBCC service region and working within management, business, science, and arts occupations commute and work outside the SBCC region. This indicates that there is not a sufficient number of these jobs in the region, which likely contributes to traffic congestion and longer commute times in the SBCC region.

2. The North sub-region has both higher unemployment and poverty rates than the other sub-regions. The unemployment rate is 2-3 percentage points higher than the Central and South sub-regions. Simultaneously, the North sub-region has a poverty rate (18%) that is greater than the state (15%) and national (15%) averages. A high poverty rate can have detrimental effects on local communities, represents lost opportunity of productivity and tax revenue, and is particularly challenging in a high-cost community like the SBCC region. The question becomes how much of the higher poverty and unemployment is due to the large number of college students and how much of it is from longer-term residents.

3. There are over 22,000 adults (18 years and older) in the SBCC region, who speak English less than very well and over 30% of responding potential and current adult education students indicated that they were very or somewhat interested in "courses that develop(ed) better English language

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skills in the workplace". Language and cultural barriers exist for a sizable minority of adults in the SBCC region. About one-third of SBCC's potential English as a Second Language (ESL) students live in a single zip code—93101—in the center of Santa Barbara City, along the coast. This area likely has the greatest need for language and cultural programs that prepares adult education students for additional education and the world of work.

WHAT WE LEARNED FROM THE PHASE II ANALYSIS

The following key findings from the student and employer survey research, include;

Potential & Current Student Survey

1. **Respondents under the age of 35 reported greater obstacles to obtaining additional education or training than older individuals.** These challenges most often relate to financial capability, finding the right programs for their schedule, and knowing which educational programs are a worthwhile investment (both in terms of time and money). People ages 26 to 35 appear to be more prone to be impeded by these obstacles, likely in part because they are more integrated into the workforce and face higher opportunity costs reducing their time spent working. Thus, in order to make courses more available and appealing to potential students, the following strategies should be considered;
   a. Programs and resources that better inform students of free non-credit courses,
   b. Aid opportunities for those who may want to pursue credit courses,
   c. Assessments of potential returns and career paths in relation to courses,
   d. Increased flexible course offerings, and
   e. Realistic and transparent time-requirements for courses and career pathways.

2. **Younger individuals were most interested in courses that taught business, technology, entrepreneurship, life-enhancement skills, and prepared individuals to get an Associate or Bachelor's degree.** While interest in potential courses was generally higher among younger age demographics, between 45-55% of those 18-25 years old were "very interested" in the above-mentioned classes.

3. **Along with financial constraints and scheduling limitations, interviewing confidence and developing quality resumes present substantial challenges to many of those between the ages of 18 and 25.** 66% and 64% felt that performing well in interviews and developing resumes and related materials to demonstrate [their] qualifications to be "considerable" or "somewhat" of a challenge. These numbers suggest that this younger demographic would benefit from courses that offered professional guidance and coaching on these aspects of professional development and career navigation.

4. **Please note that current adult education students at SBCC's SEL make up a small portion—less than 15 percent—of the potential and current student survey respondents.** The relatively small portion of current students that responded to the survey limit the ability of the research to identify obstacles, barriers, and priorities that students have that are currently enrolled at SBCC's SEL. In

the future, a representative survey of SBCC's current SEL students would provide a valuable foundation for planning to better serve and support actively enrolled students.

Regional Employer Survey

1. **Social and verbal communication skills, problem-solving, and critical thinking skills were among the most important skills for employers. They were also the most difficult skills to find among applicants.** This highlights the importance and demand for programs such as those offered by the Career Skills Institute. Given that such a large gap in skills and abilities exists, these types of programs should receive greater promotion and advertising as students and employers alike will be attracted to the program offerings and outcomes.

2. **Programs which would develop an "apprentice-type program for [firm's] future employees" received the greatest interest.** Apprenticeships would benefit all stakeholders; students would get hands-on experience and potential job placement, employers would get to pre-screen potential employees before hiring, and SBCC could see higher employment placement rates as a result of this type of program.

3. **Seven in ten employer respondents stated that they were at least "somewhat satisfied" with the educational institutions in and around the City of Santa Barbara, with only 17 percent indicating dissatisfaction.** Furthermore, 40% of respondents cited specific programs that they felt did a good job preparing students for work within their industry. These numbers are encouraging and show that the regional educational institutions are largely in good standing with regional employers.

SCHOOL OF EXTENDED LEARNING: SANTA BARBARA CITY COLLEGE - NEXT STEPS & RECOMMENDATIONS FROM THE RESEARCH

The following next steps and recommendations for SBCC's SEL, based on BW Research's assessment of the research findings, are structured as follows:

(1) SEL recommendations that support immediate employment opportunities
(2) SEL recommendations for educational transitions, transfers, and pathways
(3) SEL recommendations for improving student's quality of life

I. RECOMMENDATIONS TO SUPPORT EMPLOYMENT OPPORTUNITIES

Employment and opportunities for better and higher-paying job are a foundational motivation for approximately two out of three (66%) current SEL students. Current and potential adult education students not only indicated they were looking for a job but were also focused on developing skills and industry knowledge and experience that would provide deeper opportunities for full-time permanent employment with higher wages. The following next steps and recommendations are meant to support SBCC SEL students, both current and potential, as they look to SEL to quickly prepare them for the world of work.

Recommendation #1: Continue and expand courses that support the development of occupational pathways in business administration and small business development. Introductory courses in accounting, spreadsheets, and MS office software (Word, PowerPoint and Outlook).

Target AE Segments: CTE, Basic Skills and ESL

Geographic Area: Across the region, with a particular focus in the North and Central sub-regions where more employers and entry-level jobseekers are found.

1. Three of the 15 most-numerous occupations in the SBCC region include office clerks, bookkeeping and accounting clerks, as well as administrative assistants. These three occupational categories account for over 7,500 jobs in the SBCC region and provide a valuable entry point for positions in key industry clusters such as Finance, Insurance & Real Estate (FIRE), Information & Communications Technology (ICT), and Professional and Business Services. It is also worth noting that over half of SBCC employers that were surveyed indicated a need (great or some) for employees with strong spreadsheet skills.

   These introductory courses are meant to provide technical skills for entry-level employment but could also be used to educate students on opportunities along occupational pathways for additional skills and education with SBCC's credit courses. These introductory courses could also be used to expose students to occupational pathways in finance, accounting, and human resources and the corresponding educational requirements found with credit courses at SBCC and UCSB.

Recommendation #2: Build upon current construction, culinary, and health career courses to provide applied courses in English (verbal and written communication skills), Math, and introductory software and computer skills.

Target AE Segments: All adult education segments

Geographic Area: Across the SBCC Region but focused in the Central sub-region where the population of adults with less than a High School Diploma (as their highest level of education) are concentrated.

2. SBCCC employers indicated the difficulty and importance of finding employees with strong social and verbal communication skills, industry-specific knowledge, and relevant technical skills. SBCC SEL currently has courses to support employment in the construction, culinary, and health career fields. All of these industries employ thousands of entry-level employees in the SBCC region and make sense given current employment needs. This recommendation looks to build upon those courses to introduce the development of communication and technical skills associated with different industries, whether that is learning health records software that is becoming increasingly prevalent in health careers or the ability to communicate effectively with tourists from different regions and backgrounds.

Furthermore, most of the current computer-related courses offered focus on MS office or computer basics. Introductory-level courses that teach the fundamentals of computing and data such as networks, analytics, data science, and programming may offer a survey of potential career pathways in cutting-edge fields and promote interest in more advanced courses.

Recommendation #3: Emphasize the Career Navigation Certificate which helps students with career navigation skills (resume writing, interviewing, and industry-specific job searches) and awareness of career pathways in the SBCC region including entry-level employment opportunities (specifically in Information & Communications Technology (ICT), Biotechnology & Biomedical Devices, Finance, Insurance & Real Estate (FIRE) and Healthcare).

Target AE Segments: CTE, Basic Skills and ESL targeted towards 18 to 25-year-old SEL students and, to a lesser extent, 26 to 35-year-olds.

Geographic Area: Across the SBCC Region

3. This recommendation is geared to serve those SEL students between the ages of 18 and 25 years old, though 26-35-year-olds expressed relatively high interest in these courses as well. According to the current and potential student survey, which was completed as part of this study, approximately two-thirds (66%) of current and potential students between the ages of 18 and 25 identified, "performing well in interviews" as a challenge (either considerable or somewhat). The same age cohort had a similar percentage (64%) identify "developing resumes and related materials to demonstrate your qualifications" as a challenge. It is also worth noting that over two-thirds of respondents ages 18 to 35 identified "knowing which education or training programs or courses are worth investing the time and money in" as a challenge.

   The career navigation certification is designed to help with the challenges outlined above and should receive special emphasis and communication efforts directed towards current and potential students to increase awareness and access to the certification. Advertising should be particularly geared towards potential students, since some current students may already have a career path in mind. The recommendation also includes the development of visually appealing materials that highlight local entry-level opportunities and career pathways in ICT, Biotechnology & Biomedical Devices, FIRE, and Healthcare programs.

II. RECOMMENDATIONS FOR EDUCATIONAL TRANSITIONS, TRANSFERS AND PATHWAYS

Adult education should not only be a pathway to improve employment outcomes but should also put students on a trajectory to higher educational attainment and long-term career success. The following next steps and recommendations are meant to support adult education students as they progress towards greater education attainment and farther along employment pathways.

Recommendation #4: Reduce barriers for current & potential students while educating and promoting the lack of barriers at School for Extended Learning

Target AE Segments: All adult education segments

Geographic Area: Focused on programs in the North and Central sub-regions where need is higher

4. The majority of current and potential adult education students surveyed identified the opportunity costs (i.e. time that could otherwise be spent earning wages at a job) associated with attending a tuition-free course as well as finding programs and courses that fit their schedules as difficulties they faced in getting the education or training they wanted. While other obstacles, such as transportation and daycare, were challenges for some adult education students, ultimately the "cost" of lost wages and scheduling considerations (as well as knowing which programs, please see recommendation 3) were the two most cited obstacles for both current and potential adult education students. This recommendation is threefold;

   a. While non-credit courses are free to enroll in, current and potential students still face operational (transportation, daycare, etc.) considerations and opportunity costs in the time spent on coursework or in the classrooms when they could otherwise be making money through employment. It is likely that this is a substantial barrier, as individuals or families who are already barely getting-by are unlikely to forgo additional income today for less-immediate and tangible long-term benefits of education. Ensuring courses have flexible scheduling and offer manageable course loads may mitigate some of these obstacles.

   b. Evaluate current adult education courses and programs to assess whether they could be made more convenient for current and potential adult education students. Examine opportunities to increase online learning that provides flexible scheduling, where it is appropriate, and gather more information from students on what aspects of current programs and courses are inconvenient.

   c. Communicate and market to potential students the free non-credit and/or low-cost education and training options available at the SBCC SEL. Furthermore, advertising courses' expected convenience and less-than-traditional educational time requirements may help individuals realize courses are feasible within their current workload.

Recommendation #5: Continue to develop, market, and counsel students on various occupational and industry career pathways with information on the relevant educational requirements available at SBCC SEL, SBCC (for credit) as well as UCSB and other regional universities.

Target AE Segments: All adult education segments

Geographic Area: Across the SBCC Region

5. The SBCC SEL provides a valuable opportunity to introduce new or transitioning jobseekers to the world of work. In the SBCC region, the challenge for jobseekers generally is not finding employment, but finding employment with a career pathway and the opportunity for sustainable wages. Almost one-third (31%) of current and potential students, particularly those aged 18 to 49, that completed the survey and are currently working are working at more than one-job, and the most cited reason by current students for taking courses was to get a better job (33%). Finding a better and higher-paying job is a key objective for current and potential SEL students. This recommendation is about counseling SEL students on the career pathways available to them in the SBCC region. These pathways would include both the industry and occupations as well as the educational requirements associated with different careers. Examples in the SBCC region, could be both industry and occupational pathways;

   a. Information & Communications Technologies (ICT): Career pathways in sales, administrative support, and information technology development.

   b. Biotechnology & Biomedical Devices: Career pathways in assembly and fabrication, engineering technicians, and software development.

   c. Finance, Insurance, and Real Estate (FIRE): Career pathways in sales, customer support, and industry specific advising and analysis.

   d. Healthcare: Career pathways in nursing, administrative support, and medical records as well as managers and supervisors.

   e. Building & Design: Career pathways in construction and design positions as well as project management and supervision.

For more detailed information on relevant career pathways (as well as an example) in the SBCC region, please review pages 54-58 in the report.

III.   RECOMMENDATIONS FOR QUALITY OF LIFE ENHANCEMENTS FOR ADULT EDUCATION STUDENTS

Adult education and SBCC's School of Extended Learning is not just improving educational and employment outcomes—it has and should continue to improve the quality of life for its students. The following recommendation is meant to support adult education students as they continue as life-long learners who are engaged, connected, and working towards a higher quality of life.

Recommendation #6: Additional older adult education programs in computer fundamentals and more advanced computer-related tasks such as programming, web development and more advanced information technology literacy.

Target AE Segments: Older individuals (those 56 years and older)

Geographic Area: Across the SBCC Region

6. This recommendation seeks to build off the current areas of emphasis among older adult courses of art, English, music, psychology, and theater. Two-thirds of respondents 56 years and older stated that they had at least some interest in courses that "teach computer skills such as programming and web development". As many of these respondents were retired and content with their career paths, their profiles suggest that they are likely interested in taking such classes to learn something new or for personal enrichment rather than in the interest of furthering career opportunities.

REGIONAL ECONOMIC & WORKFORCE PROFILE

OVERALL EMPLOYMENT

There were 112,692 jobs within the Santa Barbara City College (SBCC) service region in 2018. Since 2010, employment in the region has increased by about 12%, which is lower than both state (19%) and national (13%) averages (Figure 1). The 2018 average earnings of jobs across the SBCC region are $68,294[1] per year, which is greater than the national average ($67,736) and lower than the statewide average ($80,716 per year).

It is important to note that the cost of living in the SBCC region is approximately one-third (33%) higher than the national average, however average earnings are only one percent higher than the national average.

Some of the industries which have seen the greatest job creation between 2010-2018 include Restaurants and Other Eating Places (+2,404), Services for the Elderly and Persons with Disabilities (+1,997), Computer Systems Design and Related Services (+922), and Hotels and Motels (+775).[2]

Some of the industries that lost the most jobs between 2010 and 2018 are Telephone Call Centers (-478), Aerospace Product and Parts Manufacturing (-350), and Research and Development in Physical, Engineering, and Life Sciences (-347). [3]

Economic Profile Analysis Summary

With a total of **112,692 jobs** in 2018, the Santa Barbara City College service region has grown at a **slower rate** than the state- and national averages. The SBCC region has wages that exceed the national average but are lower than the California state average.

Why is this Important?

Overall employment growth is a general indicator of the economic health of a region. Understanding the region's employment trends can help support efforts to effectively grow the economy.

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[1] Emsi 2019.1 QCEW and Non-QCEW: Taken from industry table summary and QCEW employees only not regional overview
[2] Emsi 2019.1 QCEW and Non-QCEW
[3] Emsi 2019.1 QCEW and Non-QCEW

Figure 1. Total Employment Growth, 2010-2018[4]
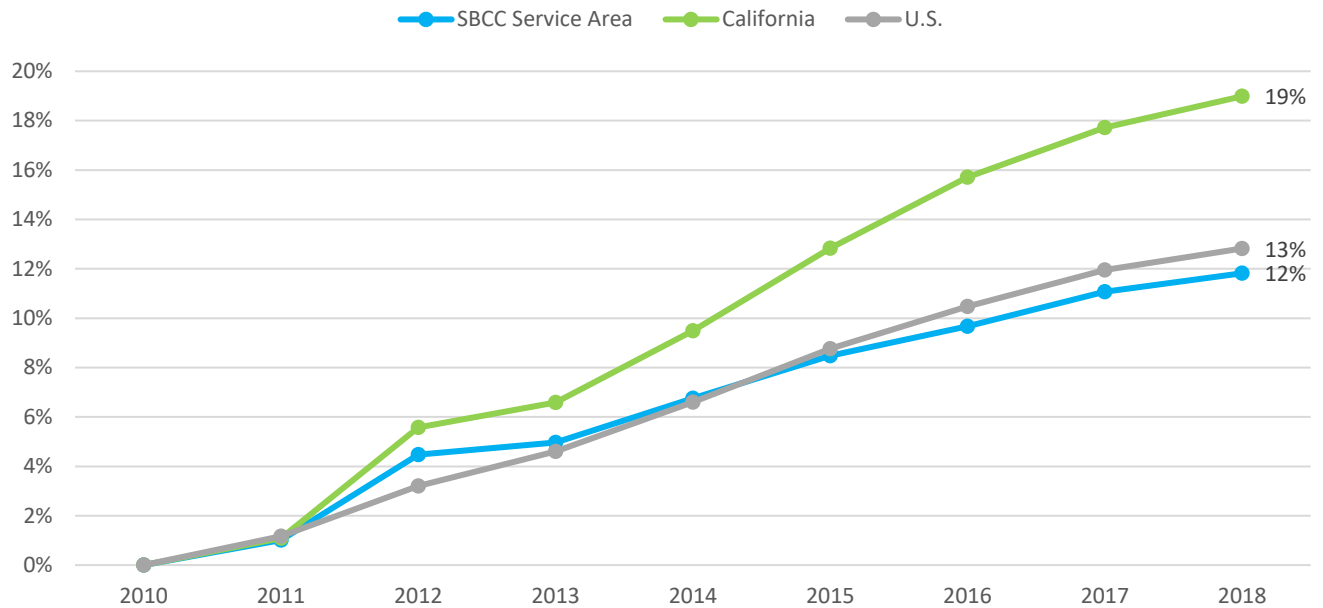
UNEMPLOYMENT

About 64% of those 16 years of age or older in the Santa Barbara City College service region are in the labor force. This labor force participation rate is slightly higher than the state and national averages of 63%[5] and is particularly high given the large college-aged student population in the cities of Goleta and Santa Barbara. The 2018 annual average unemployment rate in the SBCC region was 3.4% (Table 1),

Why is this Important?

The unemployment rate is another way to measure the economic health of a region. A low unemployment rate is a sign of a tight labor market, which means there may be more job opportunities than available workforce and greater competition for talent among firms.

which is indicative of a tight labor market at, or nearing, the natural rate of unemployment.[6] This means that the demand for jobs in the region is nearly outpacing the supply of employees.

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[4] Emsi 2019.1 QCEW and non-QCEW
[5] 2017 data. Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.
[6] Federal Reserve, 20 September 2018. Can be accessed at:
https://www.federalreserve.gov/faqs/economy_14424.htm.

Table 1. Resident Labor Force Composition

Region	In labor force	In labor force - Employed	In labor force - Unemployed
SBCC region	64%[7]	96.6%[8]	3.4%[9]

WORKFORCE PROFILE

Resident Workforce vs. Local Workforce

SBCC's workforce includes all residents in the labor force 16 years and older who may work in or outside the region. In this workforce analysis, the research team assessed how the region's workforce intersects with the local availability of jobs. To do so, the research team compared the number of people in the resident workforce to the number of local jobs in the same occupational clusters.

Data show that there are **fewer people** in the resident workforce than jobs in the SBCC region for all but one occupational cluster – management, business, science, and arts – which is also the cluster with generally higher-paying occupations (Figure 2). This means that **all other occupational clusters are net-importers of jobs** and that residents in most of the occupational clusters do not need to leave the SBCC region to go to work.

The SBCC region is a **net-exporter of workers in the management, business, science, and arts occupations**, with fewer jobs than people in the resident workforce, meaning that many workers in these occupations must leave the SBCC region to go to work. Ultimately, the SBCC region is a **net exporter of higher-paying occupations and a net importer of lower-paying occupations**. This finding is intuitive, as the relatively high cost of living would make housing tough to attain for those in the lower-paying occupations.

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[7] U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.
[8] Source: CA Employment Development Department, Labor Force Data for Cities & CDP's, 2018 December. Estimated from Carpinteria, Goleta, Isla Vista, Mission Canyon, Montecito, Santa Barbara city, Summerland, and Toro Canyon.
[9] Source: CA Employment Development Department, Labor Force Data for Cities & CDP's, 2018 December. Estimated from Carpinteria, Goleta, Isla Vista, Mission Canyon, Montecito, Santa Barbara city, Summerland, and Toro Canyon.

Figure 2. SBCC Service Area Workforce[10] vs Working in SBCC Service Area[11]
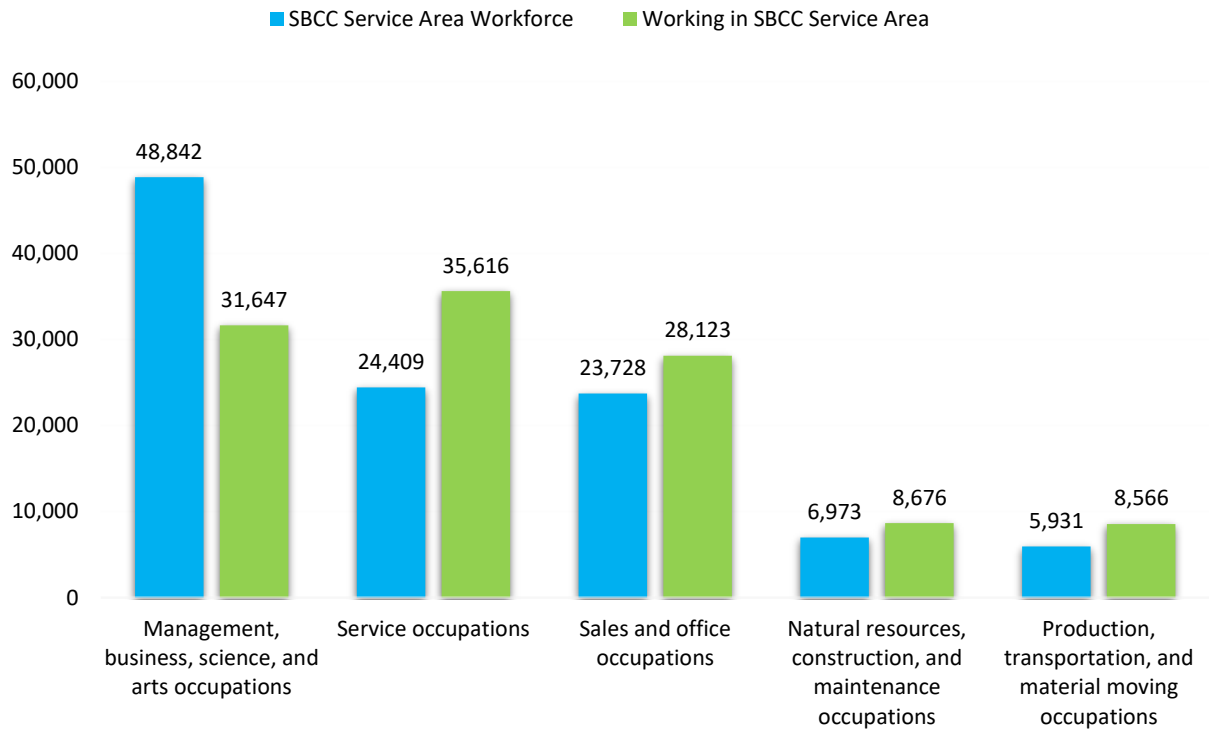
■ SBCC Service Area Workforce ■ Working in SBCC Service Area

REGIONAL DEMOGRAPHIC OVERVIEW

TOTAL POPULATION

As of 2018, the Santa Barbara City College service region was home to 205,459 residents. Between 2010 and 2018, the SBCC region's population increased 5.5%. In the next period of eight years, from 2018-2025, the population is expected to grow another 1.1%.[12] A steadily increasing population suggests a steadily increasing demand for adult education.

EDUCATIONAL ATTAINMENT

The Santa Barbara City College service region has a relatively well-educated population; 45% of residents over the age of 17 have an Associate degree or higher, compared to 37% in California on average and 36% nationally. Furthermore, the region has a smaller proportion of those who did not continue education beyond high school. 24% of residents in the SBCC region have a high school diploma or less compared to the 39% and 41% statewide and nationally (Figure 3).

### Demographic Indicators Analysis Summary

The SBCC region has a relatively high proportion of residents with an Associate degree or more, compared to state and national averages. The SBCC region population's income distribution also skews slightly more wealthy than state and national averages, with a lower percentage earning less than $75,000 per year. The SBCC region also has relatively large populations of 18-24-year-olds and those over the age of 65.

Why is this Important?

Metrics such as population growth, educational attainment, and income distribution provide a better understanding of the region's potential workforce and talent pipeline. These population characteristics have an impact on the regional workforce availability and help us understand where education and training resources can be focused.

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[12] Emsi 2019.1 QCEW and non-QCEW

Figure 3. Educational Attainment by Region, 2017[13]
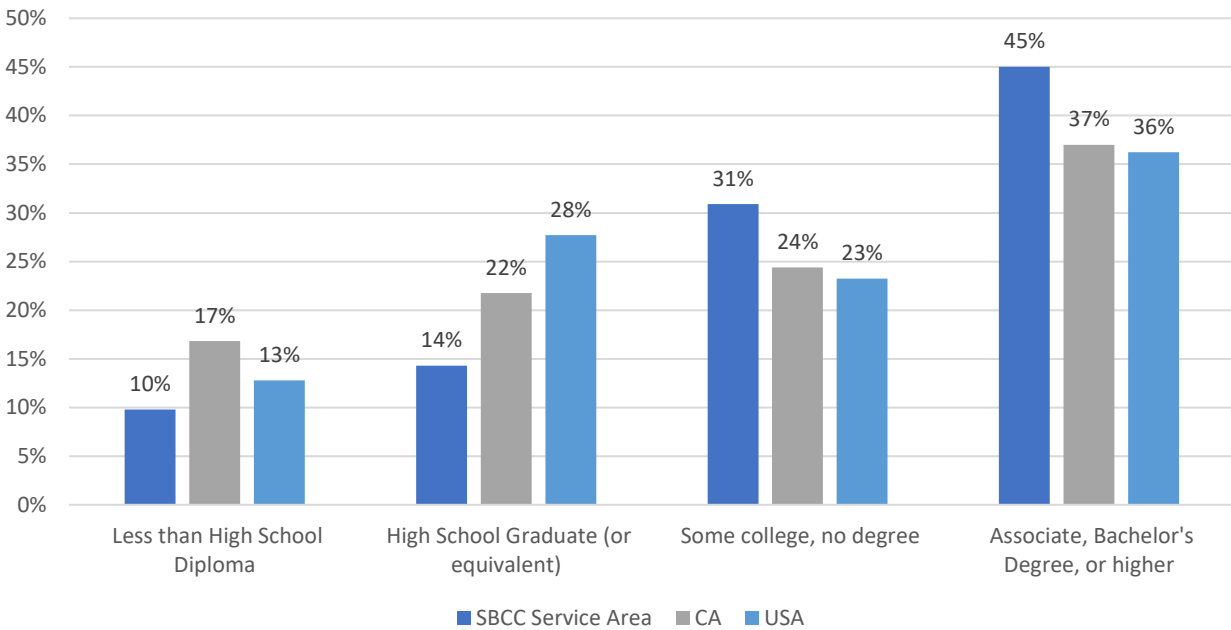
The Central sub-region has a relatively high percentage who have a high school diploma or less (28%) compared to the North (18%) and South (25%) sub-regions. This variation is also apparent for those with degrees in higher education. The percentage of the population with an Associate degree or higher is 6-9 percentage points higher in the South and Central sub-region than the North sub-region (Figure 4).

Figure 4. Educational Attainment Level in SBCC by Sub-region[14]

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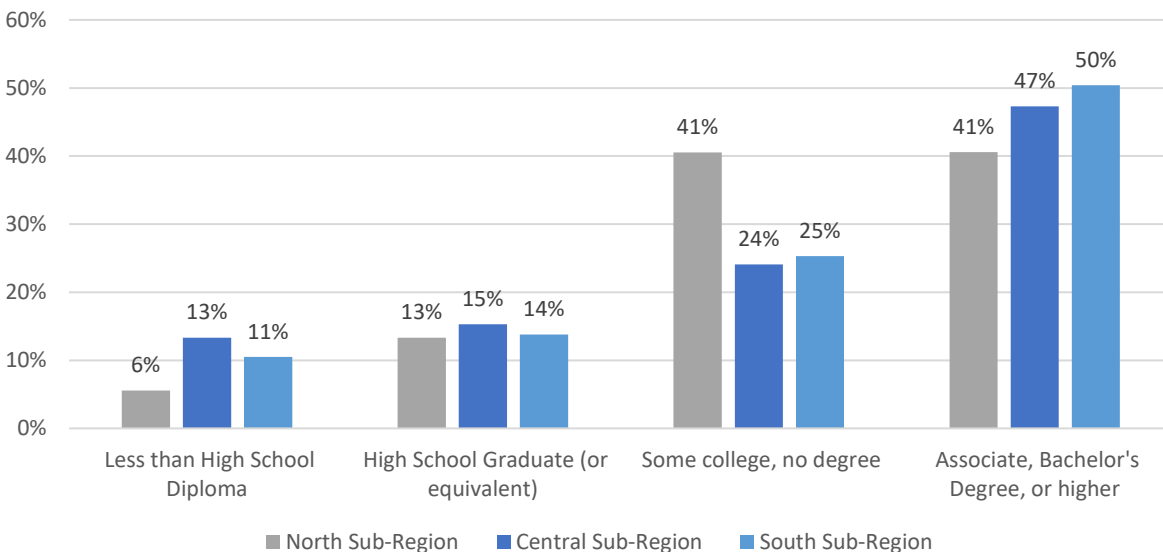
[13] Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.
[14] Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.

LITERACY

Literacy rates across the SBCC service region are relatively uniform. According to data provided by the University of North Carolina at Chapel Hill, the SBCC service region average literacy score is within the third-quartile of the US average. Looking at sub-regions, the North and South sub-regions are both in the third-quartile of the index while the Central sub-region scores just below the cusp of the third-quartile. All sub-regions fall under the index's "intermediate" score, which lies just below the highest category, which is "proficient". The zip codes with the lowest literacy rankings are 93013 (South), 93110 (Central), and 93111 (Central). The zip code with the highest literature score was 93106, which ranks well into the top quartile.[15]

INCOME

The population within the Santa Barbara City College service region contains a higher percentage of those earning $75,000 or more and a lower proportion of those earning less than $75,000 compared to state and national averages. More than half (51%) of those in the SBCC region earn $75,000 or more, while 23% earn less than $35,000 per year (Figure 5).

Income

The SBCC region has a greater proportion of higher income individuals and a lower proportion of lower income individuals than state and national averages. More than half (51%) of the SBCC region earns $75,000 or more annually.

Figure 5. Household Income Distribution, 2017[16]


SBCC Service Area   CA   USA

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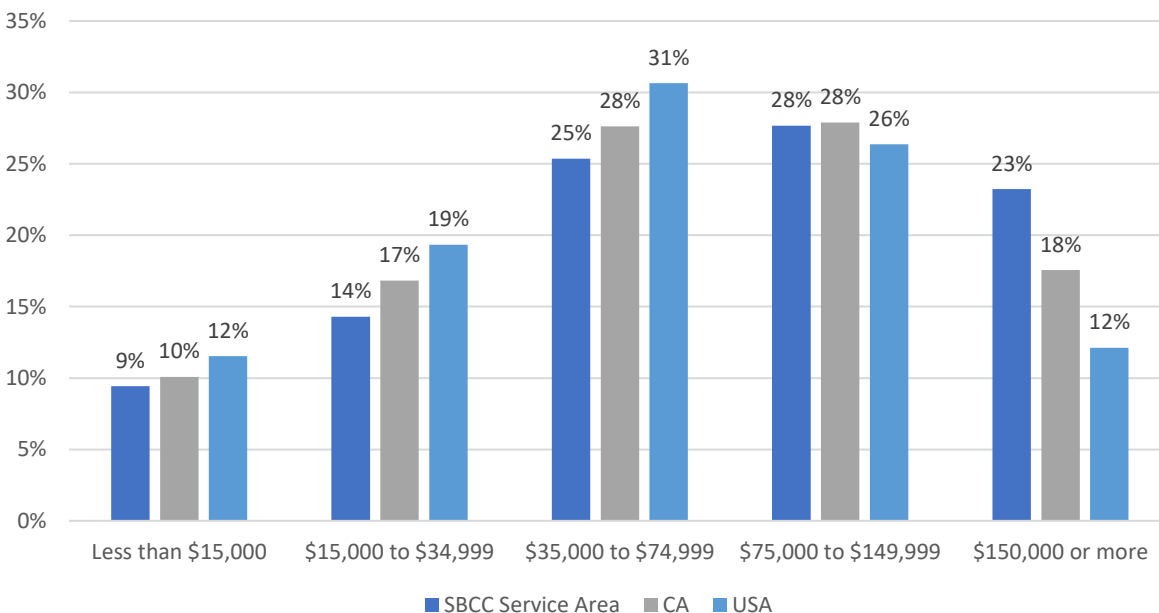
[15] National Health Literacy Mapping to Inform Health Care Policy. Health Literacy Data Map. University of North Carolina at Chapel Hill, 2014. Web. 19 September 2018.
[16] Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.

Annual earnings vary within the SBCC services region. The South sub-region has a relatively high proportion of high-earners; 32 percent earn $150,000 or more annually. Conversely, the percentage of those earning less than $35,000 annually in the North sub-region is 3-9 percentage points greater than the Central and South sub-regions (Figure 6). The large college-population likely plays a role in these lower earnings.

Figure 6. Household Income Distribution by SBCC Sub-Region, 2017[17]
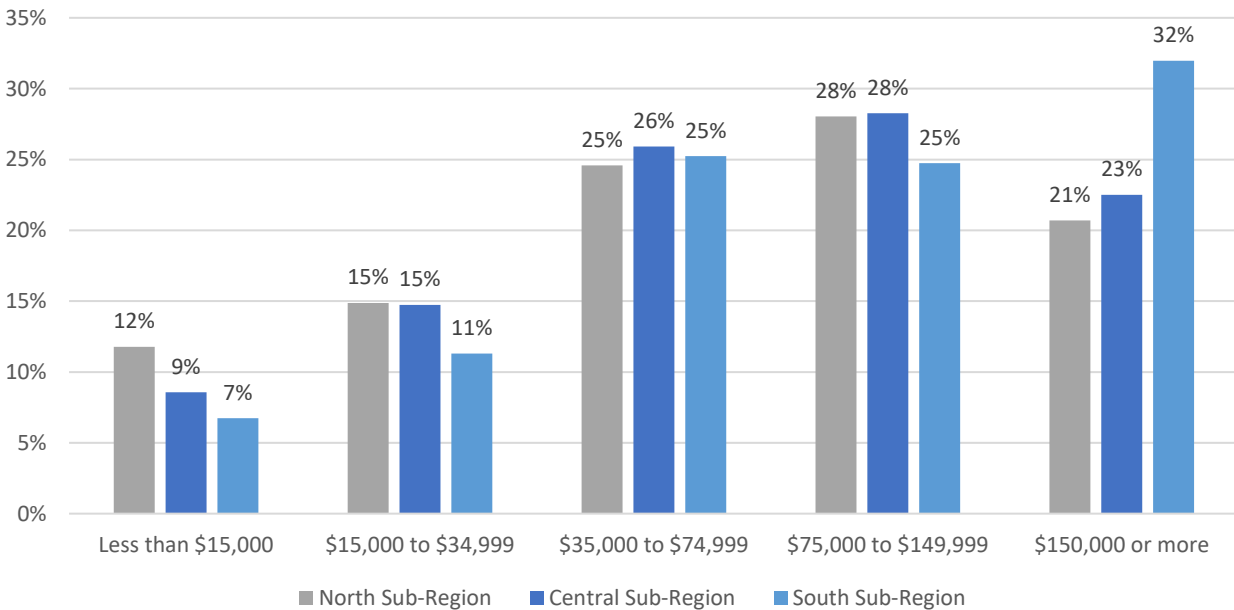

POVERTY

The SBCC service region on average has a lower rate of poverty (12%) among its residents than state (15%) and national averages (15%). The Central (12%) and South (7%) sub-regions have lower rates than the state and national averages, however, the North sub-region, with 18% of its populations income below the national poverty line for the past 12 months, has a higher poverty rate than both state and national averages (Figure 7).

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[17] Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.

Figure 7. Poverty rates in region, state, national averages and sub-region averages[18]
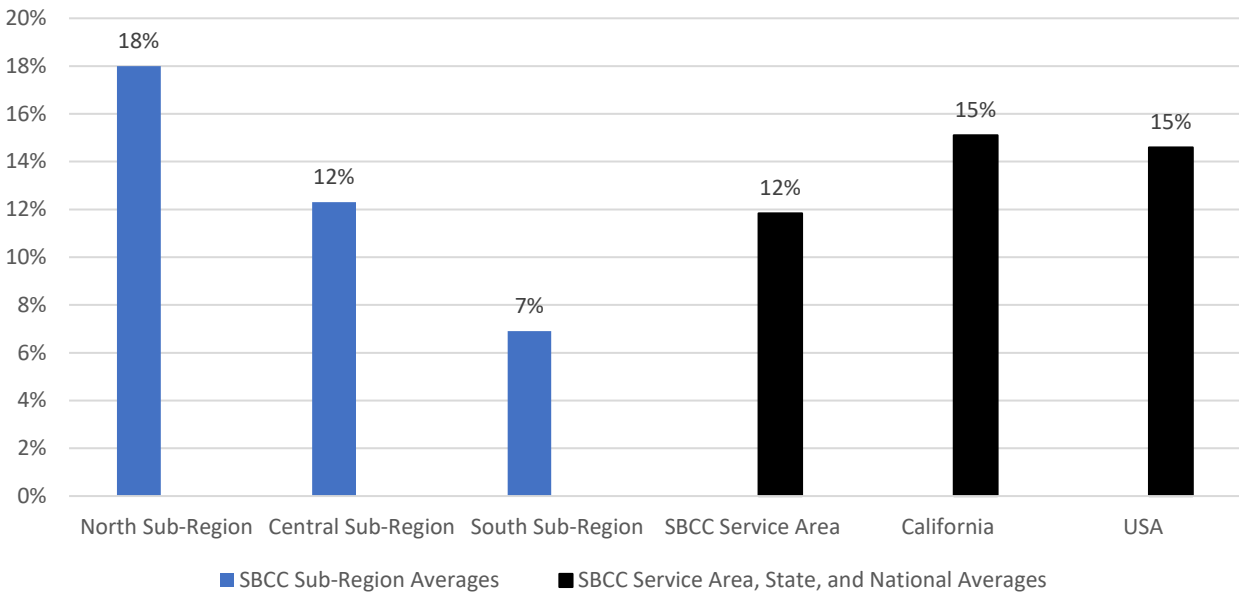

AGE DISTRIBUTION

The age distribution within the SBCC service region is comparable to the national and state averages, with the exception being higher for the young adult cohort (18 to 24 years old). With an abundance of colleges and universities in the region, it is no surprise that the region contains a high proportion of individuals between the ages of 18 and 24. The region's population over the age of 65 is also 1-3 percentage points above the state and national averages (Figure 8).

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[18] Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.

Figure 8. Age Distribution of Regions, 2017[19]
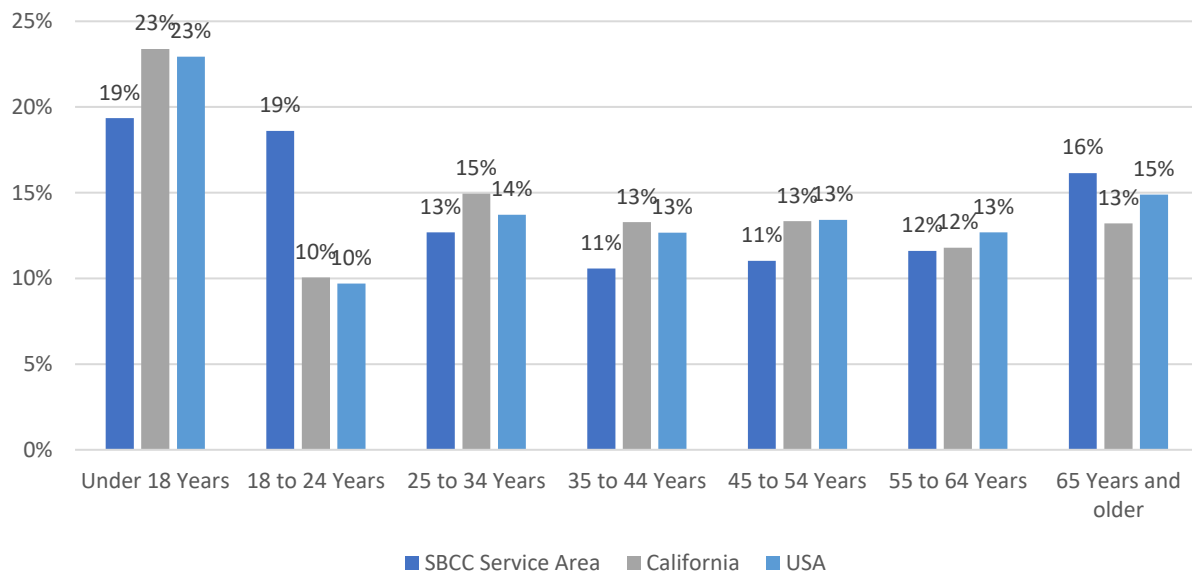
The South sub-region of the SBCC service region contains a relatively high proportion (40%) of those over the age of 54 compared to the Central (29%) and North (22%) sub-regions. In contrast, it is apparent that the population of numerous colleges in the North sub-region have resulted in more than a quarter (28%) of the sub-region's population being between the ages of 18 and 24 years old (Figure 9).

Figure 9. Age Distributions of SBCC Sub-Regions, 2017[20]

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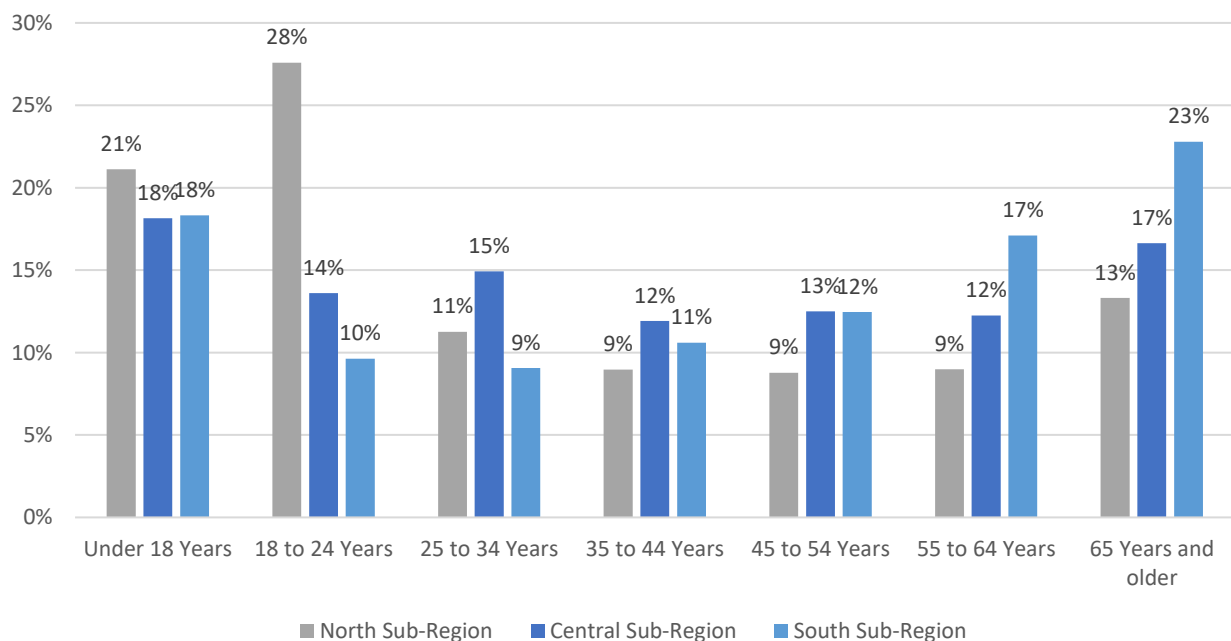
[19] Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.
[20] Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.

POTENTIAL STUDENT ANALYSIS

The potential Santa Barbara City College (SBCC) student population is delineated into six categories:

Students Needing Elementary & Secondary Basic Skills
These potential students have less than a high school diploma (or high school equivalency). Adult education courses targeting these students are meant to build a solid foundation of vocabulary, reading, and writing skills, and/or assist students in completing their high school diploma or equivalency.

English as Second Language (ESL)
This includes population 18 years and older who speak English "less than very well." Adult education courses targeting this population will offer classes for adult English language learners, vocational English as a Second Language (ESL), and citizenship courses.

Adult with Disabilities
Includes the population 18 to 64 years old with a verified disability such as: hearing, vision, or cognitive disability, self-care difficulty, or independent living difficulty. Adult education courses targeting this population offer services and programs that are meant to support educational goals and increase independence.

Older Worker
These potential students include working (i.e. in the labor force) population 55 years or older who are either employed or unemployed. These adult education courses help older workers acquire and develop skills that are important for career transitions and/or job market competitiveness.

Career & Technical Education (CTE):
These adult education courses are meant to provide specific training and education to expand and improve employment opportunities, to assist students in completing their college degree, or to help them move into a career pathway.

Parents of Pre-Kindergarten Age Children (6 years or younger)
These potential students are parents of young children who may struggle with the constant demands of raising young children. These courses will help new parents mitigate these challenges.

The following population segments were selected for further emphasis as the need for courses and programs is important.

1. **Students with Elementary & Secondary Basic Skills**

Potential students include adults 18 years and older with less than a high school diploma (or equivalent). The zip code 93101, in the Central sub-region, has the greatest number (5,291) of potential Basic Skills students. The zip codes 93117 and 93013 have 2,948 and 2,568 potential basic students, respectively (Figure 10).

Figure 10. SBCC population which has attained less than a high school diploma or equivalent[21]


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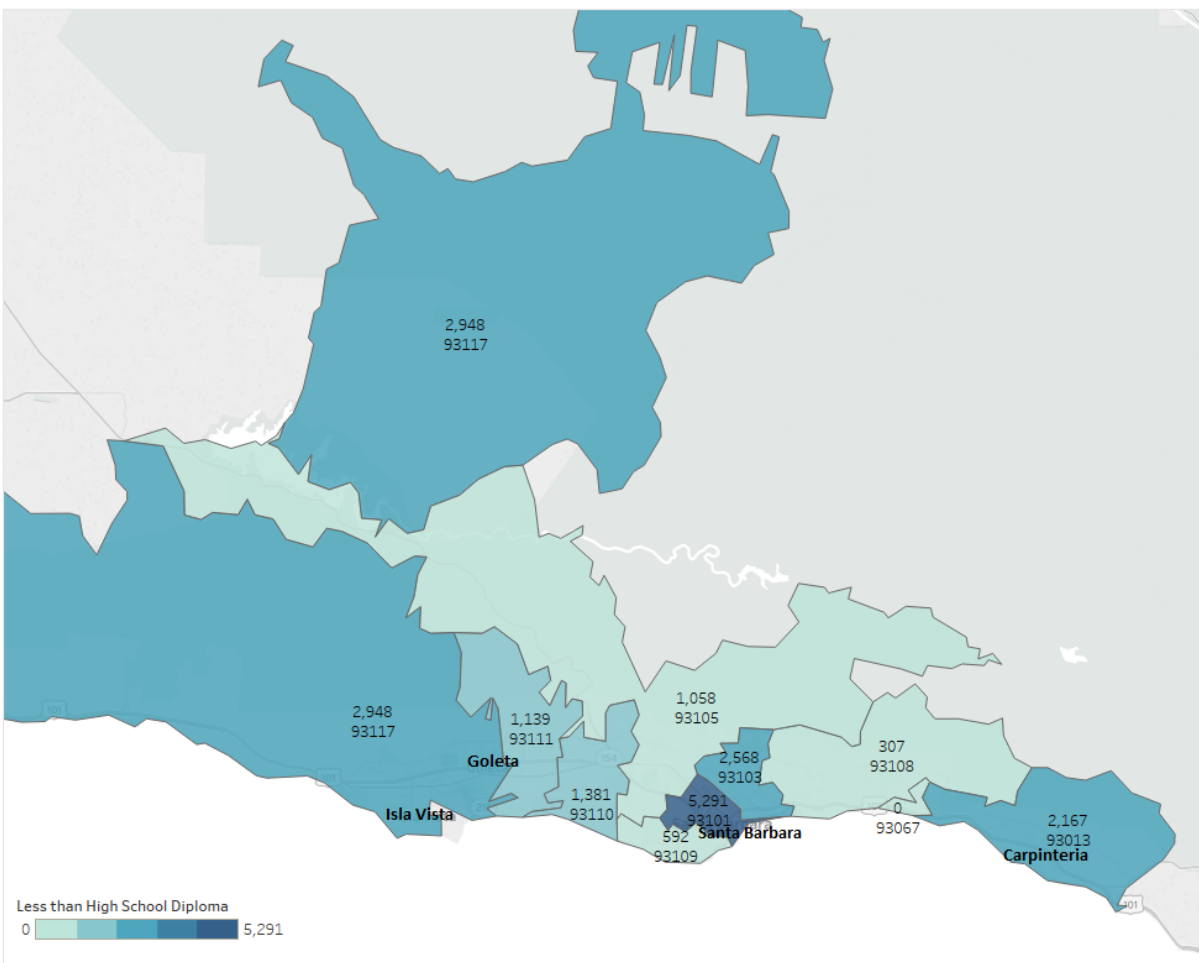
[21] Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.

2. English as a Second Language (ESL)

Potential ESL students are adults 18 years or older who speak English less than "very well." The zip code 93101 has the most potential students, with 7,043 adult residents who speak English less than "very well". The zip code 93117, on the western edge of the SBCC region, has the second largest potential ESL student population, with more than 5,760 potential students (Figure 11).

*Figure 11. SBCC population 18 years and older which speaks English less than "very well"[22]*
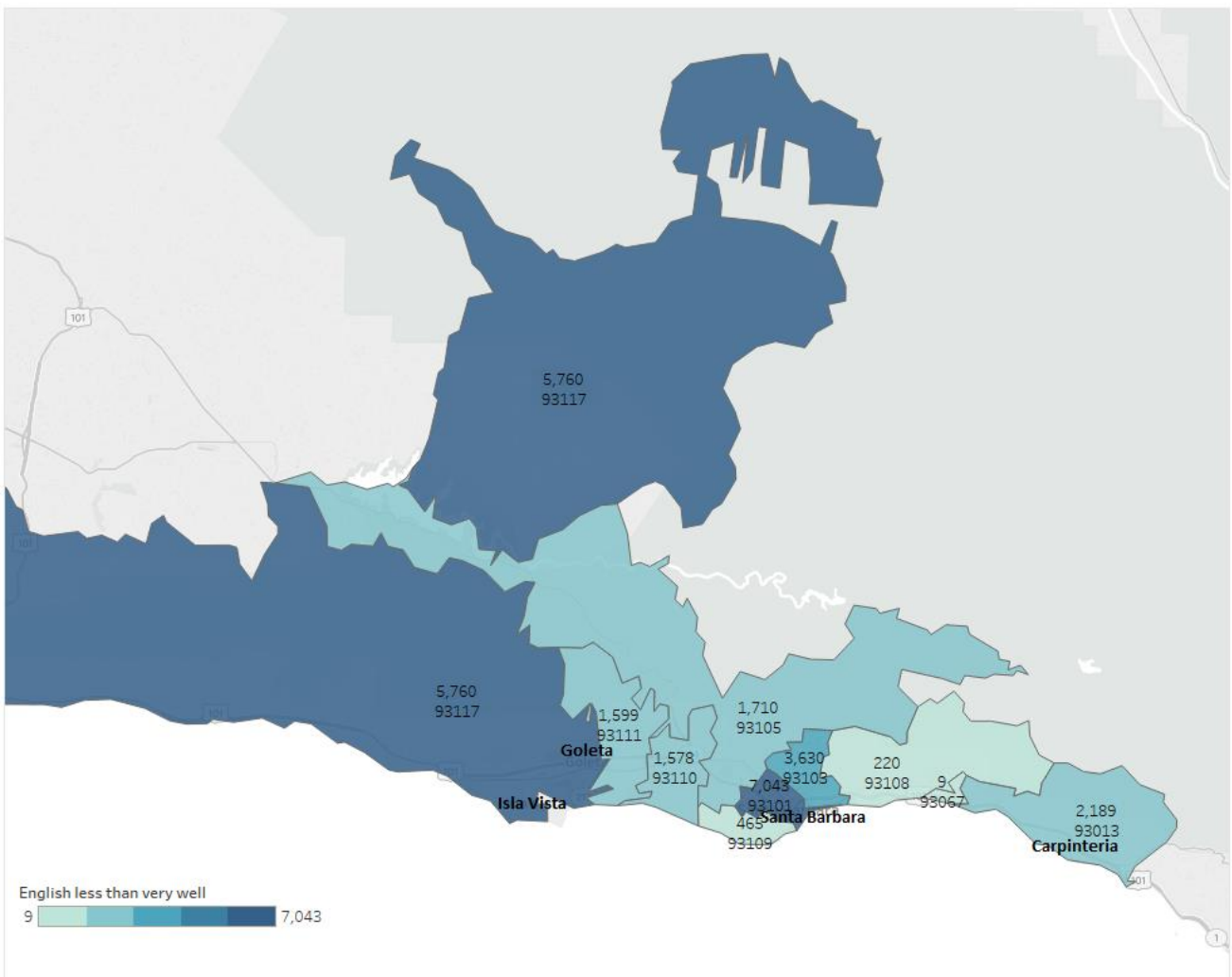
3. Adults with a Disability

The zip code 93117 has the largest population of those with a disability; there are 2,104 adults with a disability. The zip code 93101, in the center of the SBCC region, also has a substantial population of adults with a disability. More than 1,891 adult residents have there have a disability (Figure 12).

Figure 12. SBCC population (ages 18-64) that is disabled[23]
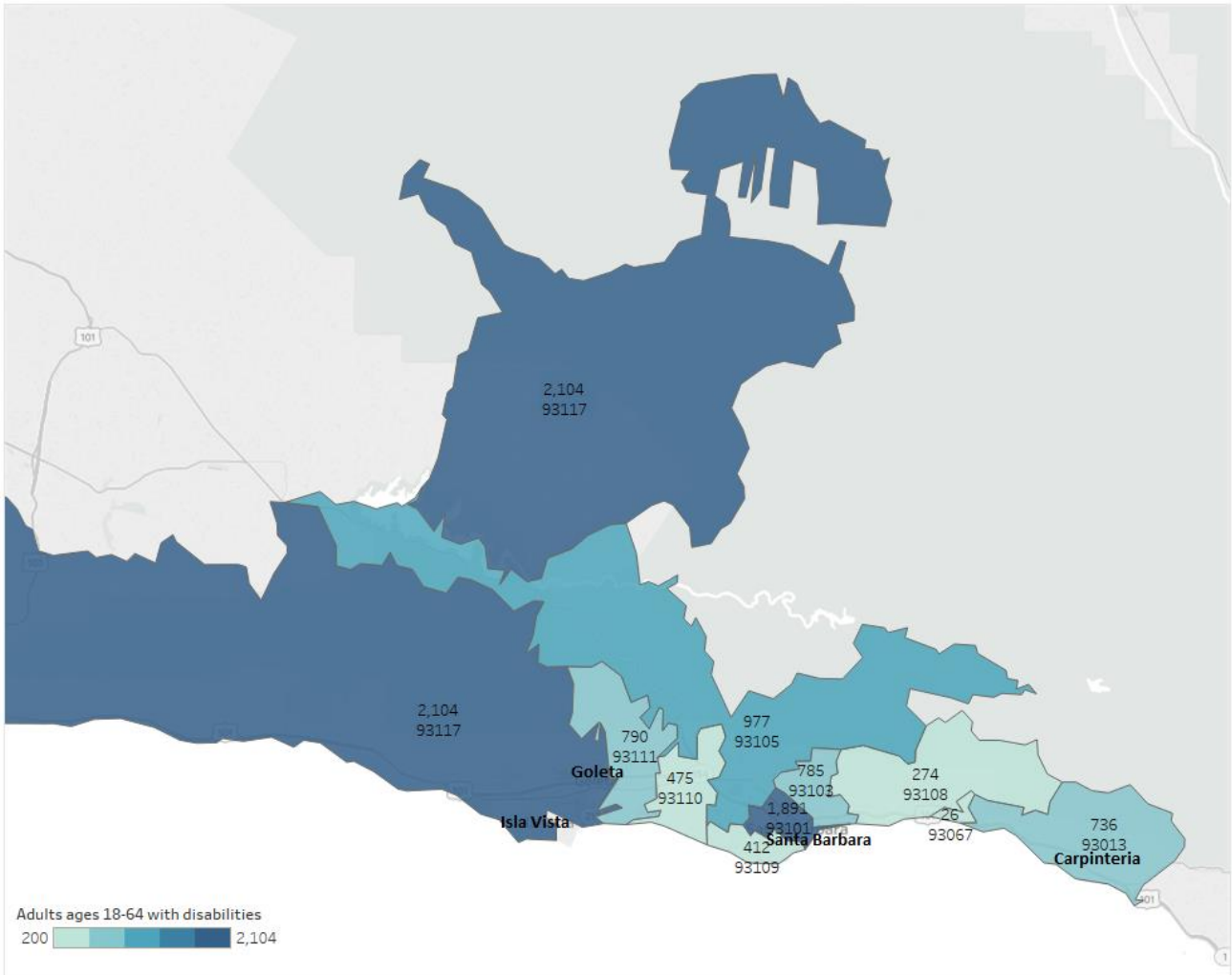
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4. Older Workers

Older workers are those ages 55 or older and who are still in the labor force (either employed or unemployed). The zip codes with the largest older populations still in the workforce are 93117 and 93105, with 4,271 and 3,895 older workers respectively, and are in the North sub-region (Figure 13).

Figure 13. SBCC population that is 55 years of age or older, in the labor force (both employed and unemployed)[24]

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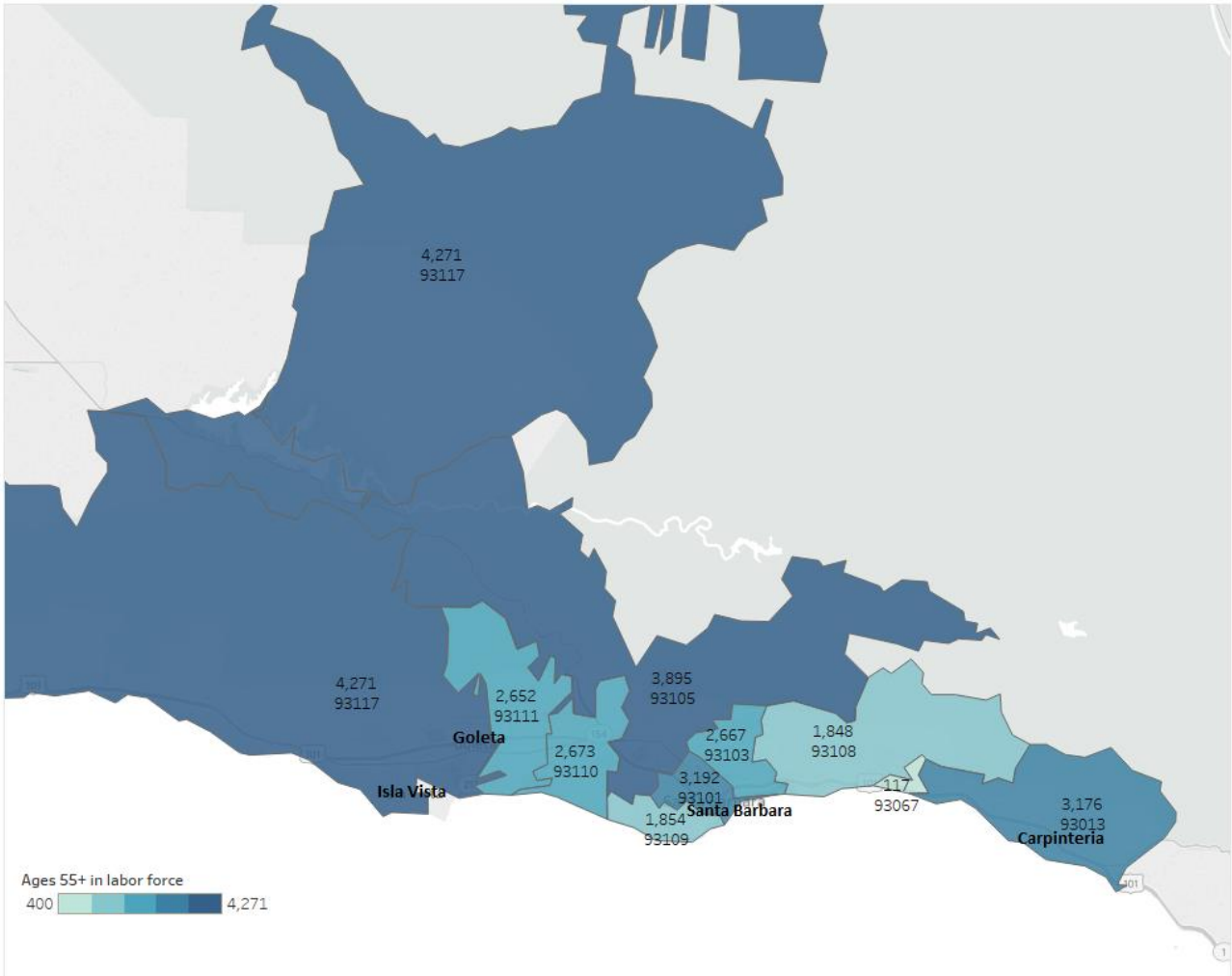
[24] Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.

5. Career & Technical Education (CTE)

Career & Technical Education courses are meant to provide specific training and education to expand and improve employment opportunities and move student into career pathways. These potential students include workers trying to get a degree or certificate, get a job, get a better job, or get promoted with their current employer. Developing strong CTE classes and programs will include identifying technical and non-technical skills demanded in growing industry clusters to better prepare students to complete a degree, enter the workforce, select career pathways, and/or move up in the career lattice. For these classes, two population segments were identified: (1) adults with a high school diploma and (2) adults with some college, no degree.

a. Adults with a High School Diploma (or Equivalent)

The zip code 93117 has the largest population with 6,601 potential CTE students with a high school diploma or equivalent. The zip code 93101 also has a sizeable population (4,343) of potential CTE students (Figure 14).

*Figure 14. SBCC population (age 18 and above) that has attained a high school diploma[25]*

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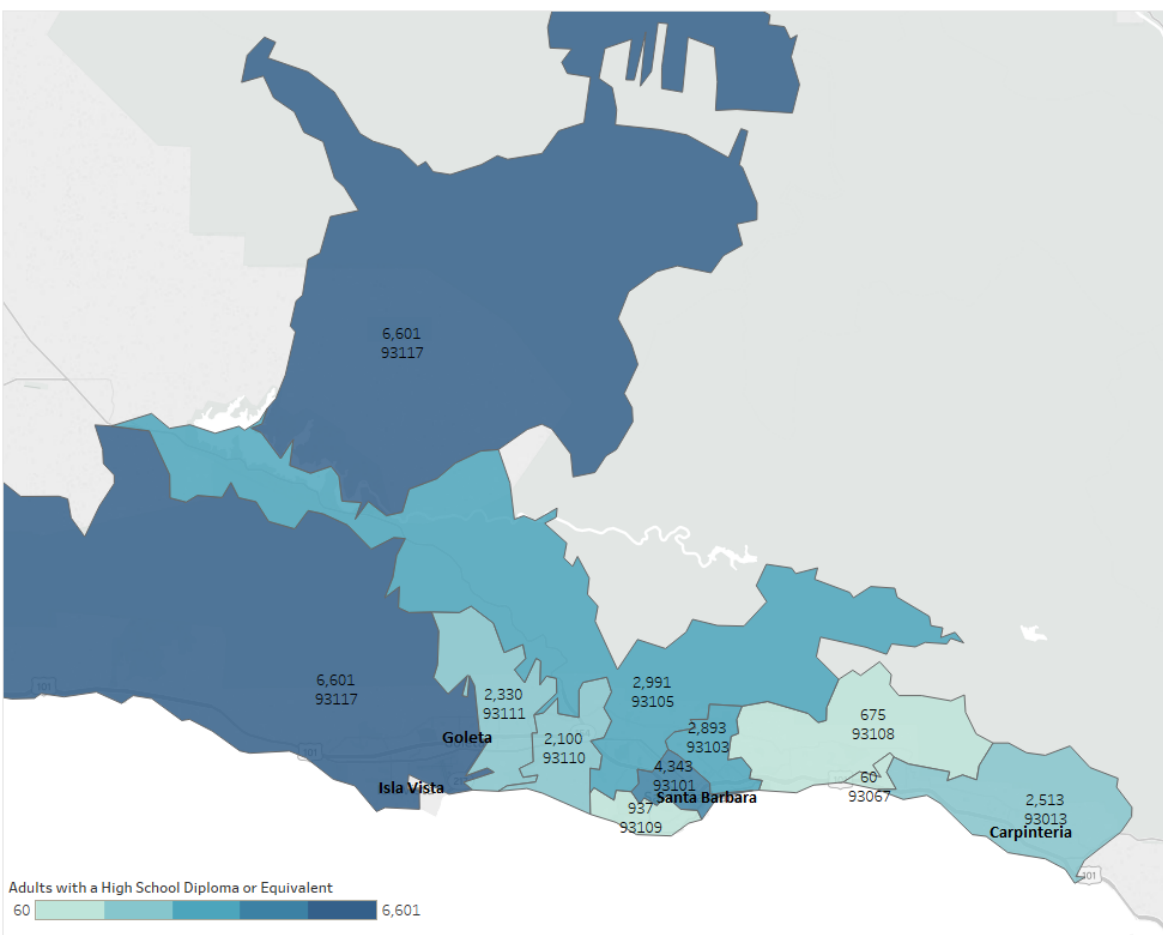
[25] Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.

b. Adults with some college, no degree

Rates of those who have attended some college but did not earn a degree in the SBCC region also trend closely to one another with exception of the zip code 93117, which has most of the region's colleges and subsequently has a relatively large population of those with some college (25,424 adults). The zip code 93101 (Central) has the second-largest population of some college, no degree individuals, with more than 6,185 potential students (Figure 15).

*Figure 15. SBCC population which has attended some college, no degree[26]*
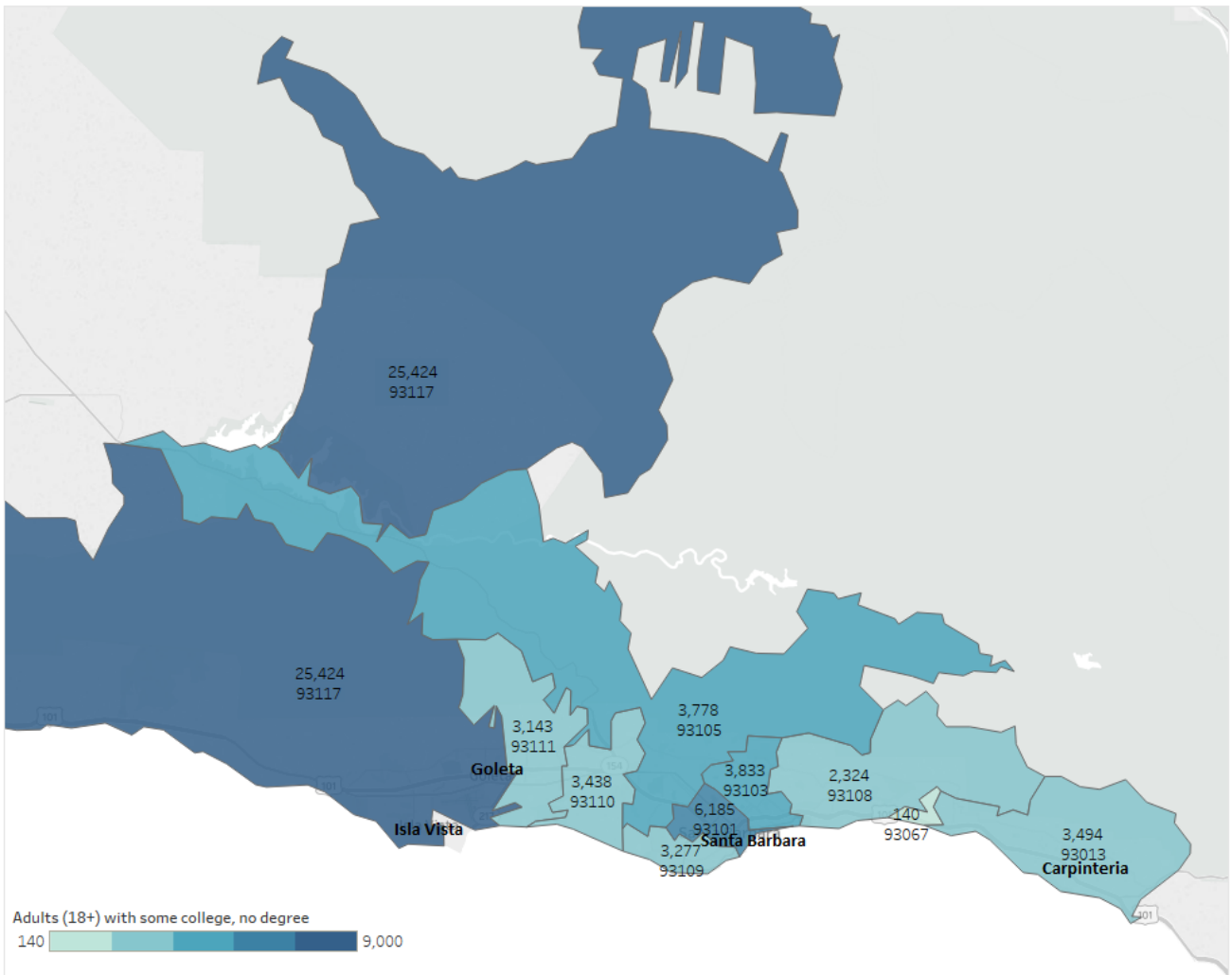
6. Families with Pre-Kindergarten Age Children

Two zip codes in the Central sub-region, 93101 and 93105, with 1,207 and 893 families respectively, have a large number of families with young children. The zip code 93117 (North) has the most families with a child younger than 6 years (Figure 16).

Figure 16. Families with children under the age of 6 in SBCC service region[27]
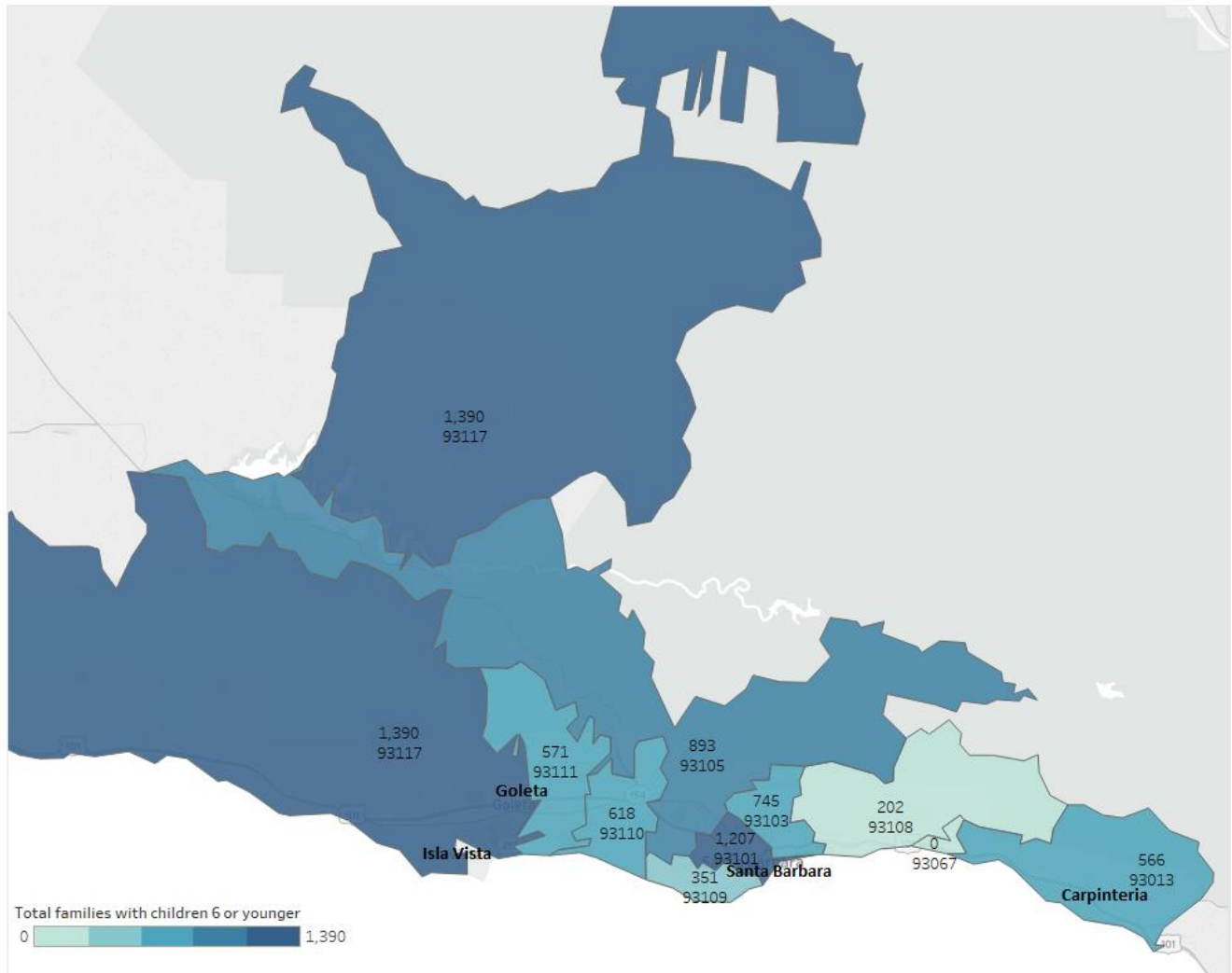
29

REGIONAL POTENTIAL STUDENT SURVEY

To better understand the regional landscape of potential students in the SBCC region, BW Research conducted a survey of 207 residents within the SBCC service area. Survey respondents were ages 18 and over, and only those who lived within the SBCC region were able to continue with the survey. 13% of respondents were currently taking courses offered through Santa Barbara City College. The following are some of the key findings from the survey, which will offer insight into the success and areas for potential improvements in SBCC's offerings.

Younger individuals face more substantial obstacles in obtaining the education or training they desire than older individuals. 71.4% of those between the ages of 18 and 35 felt that finding programs and courses that work with their schedule was "somewhat a challenge" or a "considerable challenge". This challenge was even further pronounced among those who were 26-35 years old and presumably more involved in a career and in the workforce. Furthermore, 70.4% of those 18-35 felt that knowing which education or training program was worth investing time and money into was a "somewhat" or "considerable challenge". 43.1% of respondents between the ages of 18 and 55 felt that the costs of attending courses was a "considerable challenge"; an additional 26.4% felt it was "somewhat of a challenge".

Interest in potential courses varied by age. The courses that received the most interest by those under the age of 35 were programs that "support small businesses and entrepreneurship", courses that "teach business and technology skills in the workplace", and courses that "teach life-enhancement skills and improve my quality of life". 45% of respondents ages 18-25 reported interest in courses that "prepare you to get an Associate or bachelor's degree", while interest among other age categories was substantially lower (Figure 17).

Figure 17. Percent "Very Interested" in courses by age
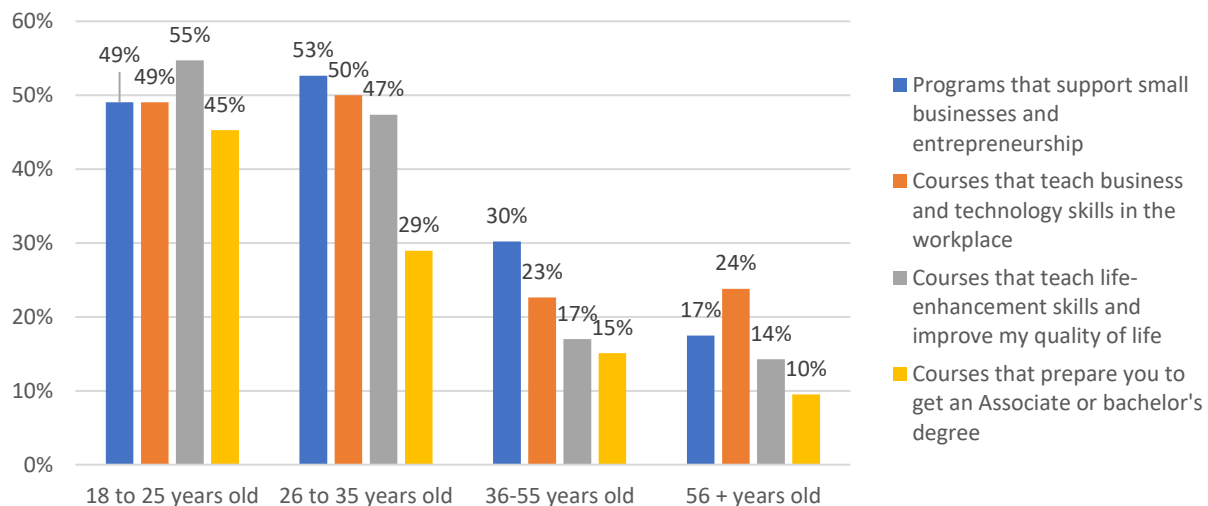
While money and scheduling are substantial obstacles for those under the age of 55, performing well in interviews and developing resumes are substantial obstacles for those ages 18-25. 66.0% of those ages 18-25 felt that performing well in interviews was an either "somewhat a challenge" or a "considerable challenge". 64.2% of respondents felt that developing resumes and related materials to demonstrate [their] qualifications. Given these high levels of perceived impediments, courses that refine younger students' interview skills and resumes could receive high levels of interest.

Figure 18. Percentage of respondents who felt these tasks to be "considerable" or "somewhat" of a challenge

Legend:
- ■ Developing resumes and related materials that demonstrate your qualifications
- ■ Performing well in interviews
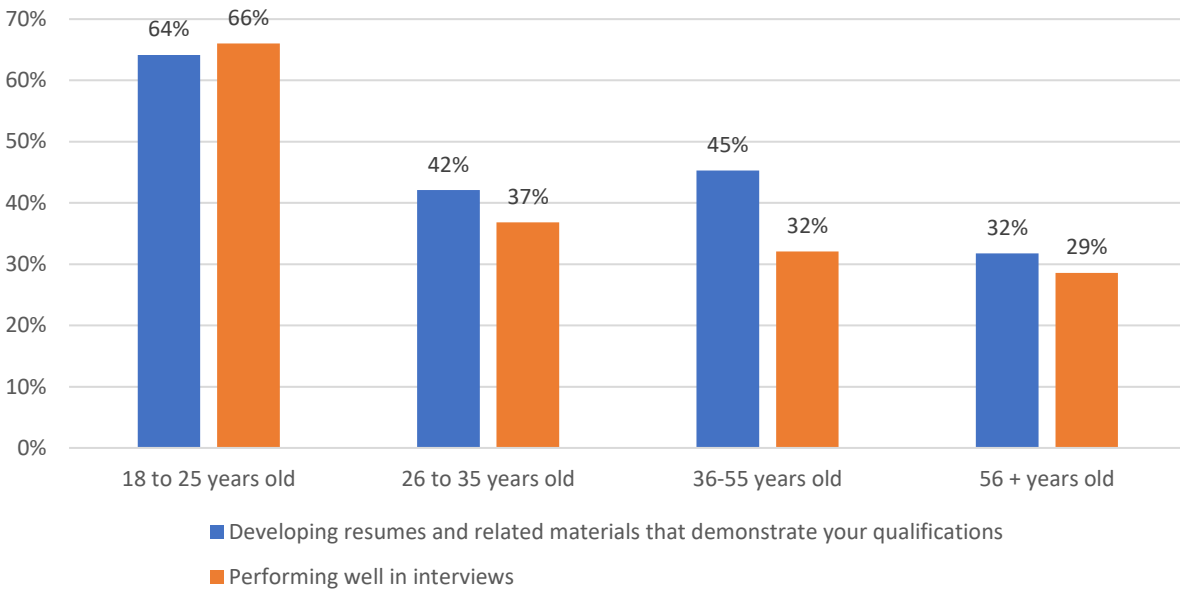
Most current students heard about the SBCC School of Extended Learning (SEL) Programs through the school's website or family and friends. Surprisingly, most of those who found out about SBCC SEL through social media were over the age of 35. Other studies conducted by BW Research suggest that young Millennials and Generation Z frequently use social media compared to older generations. This suggests that a new social media marketing strategy (using apps such as Instagram and Snapchat) could be employed in order to reach younger audiences.

REGIONAL EMPLOYER ANALYSIS

In order to gain a better perspective of the region's employers, BW Research conducted a survey of over 200 employers in the SBCC region. Of the respondents, the average firm size was about 47 employees, though the median was lower at 10 employees per location. The following analysis discusses the findings of this primary research and highlights some strategies which could be utilized to best capitalize on the region's employment landscape.

Respondent firms in the Santa Barbara City College region have expectations for some growth in the coming year. A majority (56%) of employers surveyed expected to have the same number of employees a

year after completing the survey. Another 39% of respondents were more optimistic and stated they anticipated to have more employees a year from now. Only 2% of respondents felt that they would have fewer employees after the coming year. These findings suggest that the regional economic outlook is relatively strong and that about four-in-ten employers are often looking to expand their teams.

Figure 19. Expected change in number of employees over next 12 months
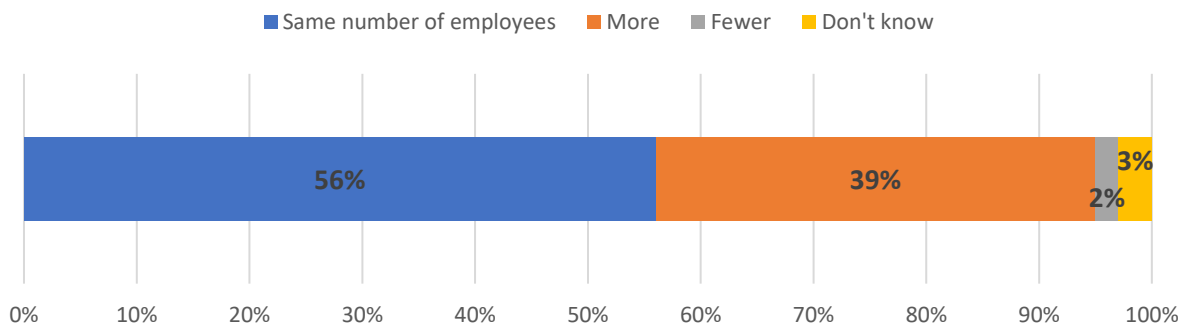
About one in three respondent firms have grown in size in the past three years. Over the three years preceding the survey, 54% of firms have remained the same size in terms of number of employees. 36% of respondent firms reported that they had increased the number of employees and only 7% reported that the number of their employees had declined during this time. These results suggest that economic growth in the Santa Barbara City College region has been strong in the recent past.

The respondent firms represented a diverse range of employers in the Santa Barbara City College region. Among the survey respondents, firms that worked in the Financial, Banking, Insurance, or Real Estate (16%), Healthcare (15%), Building or Construction (14%), and Restaurant (11%) were the most common. Hotels (5%) and Technology or Information & Communication Technologies (6%) were the least common industries that were explicitly listed in the survey, though free-responses concluded that an additional 4% of respondents worked in Non-Profits and 4% worked in Recreation industries (Figure 20).

Figure 20. Industry composition of employer survey respondents
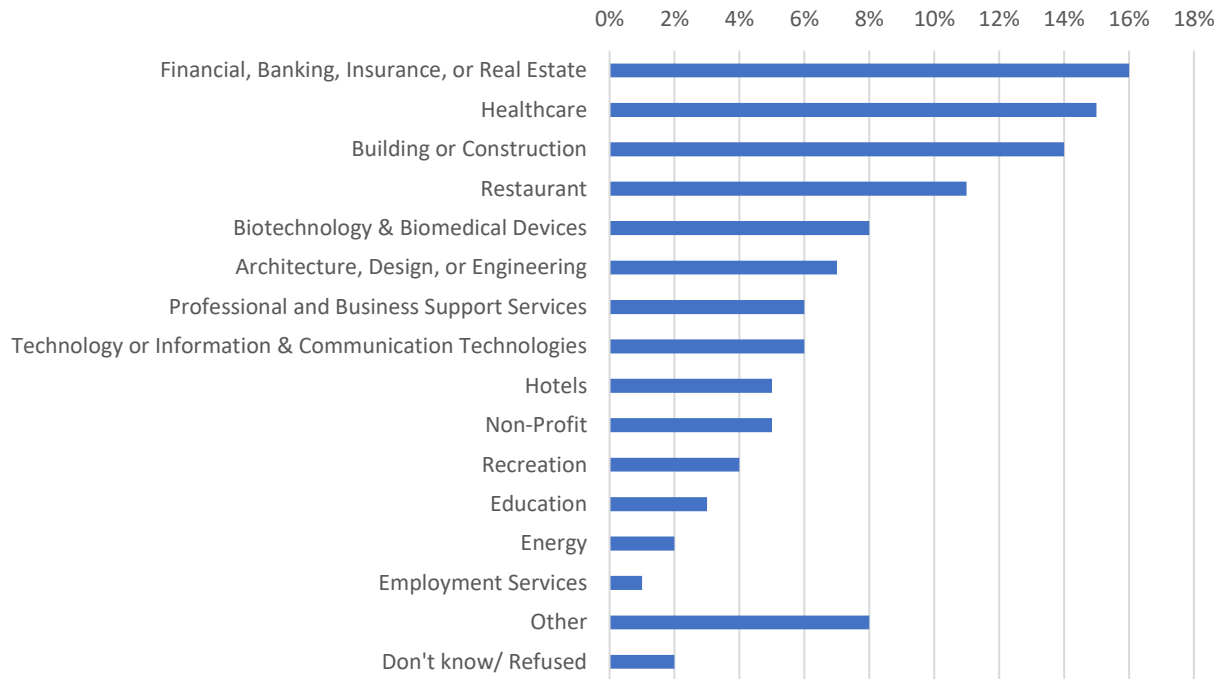
Respondent firms struggled to find qualified applicants at all levels of experience. Despite seemingly positive economic outlooks, most firms reported hiring difficulty. In finding qualified **entry-level** applicants over the past 12 months, 43% of respondents reported it was "somewhat difficult" while another 28% reported it was "very difficult" (Figure 21). Similarly, in seeking **non-entry level** applicants, 34% of respondent firms said the process was "somewhat difficult" while another 31% said it was "very difficult" (Figure 22). Only 23% and 18% of respondent firms said it was "not at all difficult" to find qualified entry-level and non-entry level candidates, respectively.

Non-Profit Employers

Non-profit employers cited effective communication abilities as the skill most frequently missing from job applicants. Problem solving and critical thinking, and writing (including technical writing) were also commonly-cited missing skills.

Social cooperation and communication were key themes among non-profit employers. One respondent even suggested the development of a new program in the region that teaches social and emotional learning.

*Figure 21. Difficulty finding **entry-level** applicants in the past 12 months*
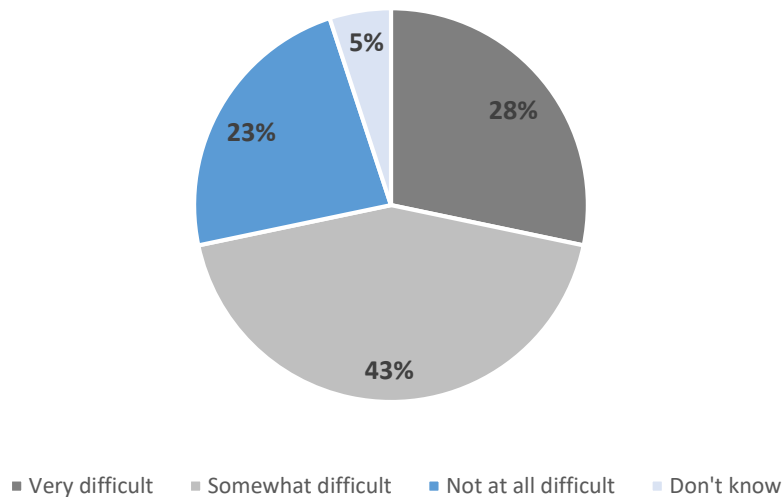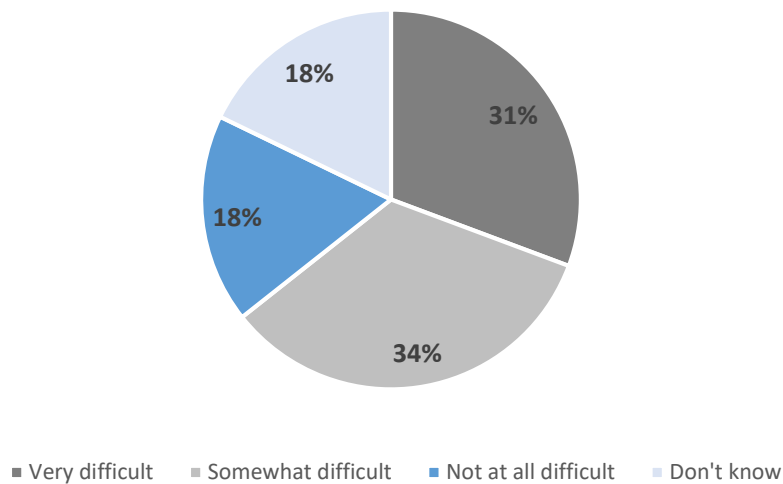

■ Very difficult   ■ Somewhat difficult   ■ Not at all difficult   ■ Don't know

*Figure 22. Difficulty finding **non-entry-level** applicants in the past 12 months*

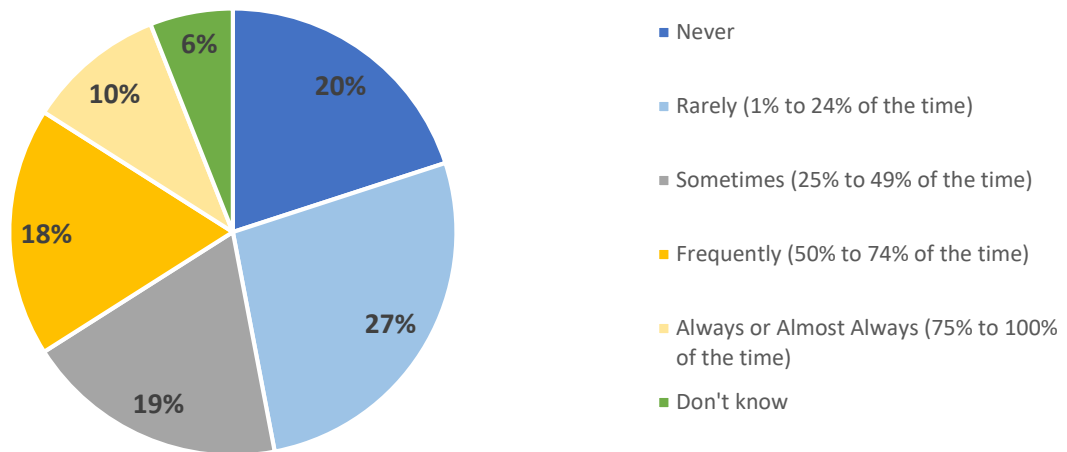■ Very difficult   ■ Somewhat difficult   ■ Not at all difficult   ■ Don't know

Small applicant pool and a lack of experience/industry-specific knowledge were the two most commonly cited reasons for reported difficulty hiring. 41% of respondents identified a small applicant pool as one of the two most significant reasons for hiring difficulty and 31% cited a lack of experience/industry-specific knowledge. Among the three skills most frequently lacking in new-hires were communication, experience, and problem solving. These three reasons appeared frequently throughout the survey as a significant impediment to hiring.

Regional firms tend to hire non-entry level roles through outside sources and internal promotion about evenly. 44% of firms reported that, when it comes to non-entry level positions, they promoted within the company or hired outside of the company about evenly. Furthermore, 29% reported that they more often promoted from within the company and 23% stated they more often hired from outside the company.

About half of the respondents stated they "rarely" (27%) or "never" (20%) recruited individuals from outside the Greater Santa Barbara City area. Another 19% stated that they sometimes (25% to 49% of the time) recruited from outside the area. Only 18% reported that they frequently recruited from outside the area and another 10% stated they always or almost always recruited outside of the Greater Santa Barbara City area (Figure 23).

Figure 23. How often employers recruit individuals from outside the greater Santa Barba City area

- Never
- Rarely (1% to 24% of the time)
- Sometimes (25% to 49% of the time)
- Frequently (50% to 74% of the time)
- Always or Almost Always (75% to 100% of the time)
- Don't know

Most positions identified throughout the survey had minimum requirements of a high school diploma or less. When asked to consider positions at their firms that required less than a 4-year degree, nearly five in ten respondents (46%) stated that the minimum education for these roles was a high school diploma. Furthermore, only 15% of firms stated that a professional certificate or certification was the minimum education required, and only 12% stated an associate degree was the minimum. In all, 54% of roles identified by these firms had a minimum education of a high school diploma or less.

Social and verbal communication skills, and problem-solving and critical thinking skills were among the most important skills for employers and were often the most difficult to find amongst applicants. 83% of respondents stated that social and verbal communication skills were "very important", though 71% stated finding applicants with these skills was either "very difficult" or "somewhat difficult". Another skill, problem-solving and critical thinking, was similarly of high importance and ranked high in difficulty finding among applicants. "Educational degrees and certifications" were among the least important factors and was reported to be among the least difficult to find adequate qualifications in new applicants (Figure 24).

*Figure 24. Importance and difficulty of applicants with skills/certifications*
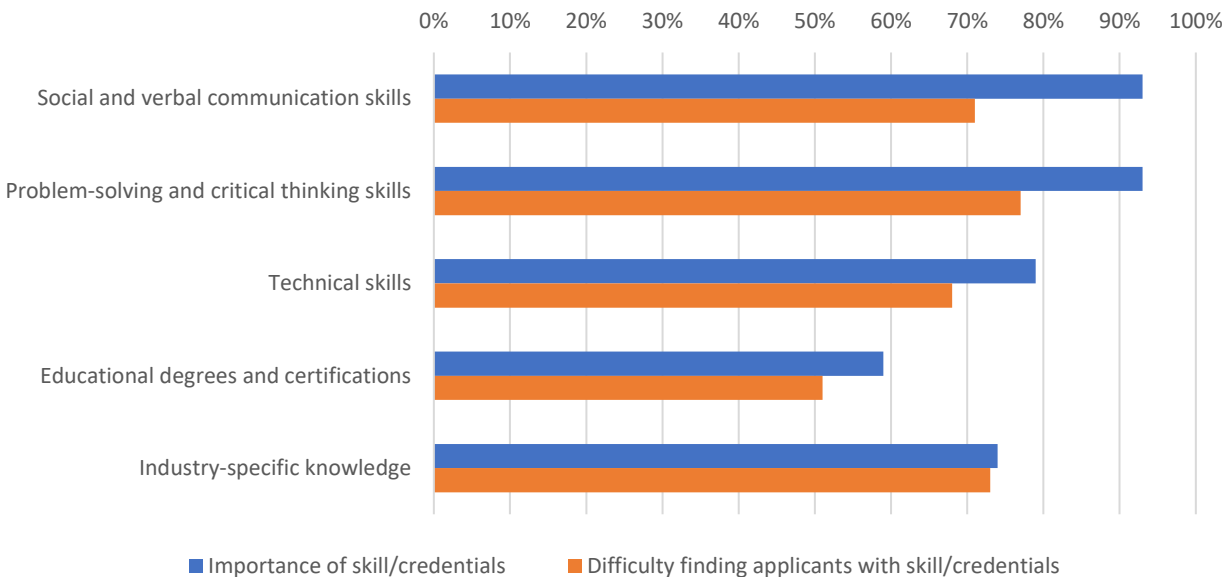
Seven in ten respondents stated they were satisfied with the educational institutions in and around the City of Santa Barbara. 38% of respondents reported they were "very satisfied" and another 32% reported they were "somewhat satisfied". Only 11% responded that they were "somewhat dissatisfied" and another 6% were "very dissatisfied". It is worth noting that 13% of respondents stated they "did not know", which suggests that they may be unfamiliar with the programs available at Santa Barbara City College and other local institutions (Figure 25).

Figure 25. Respondents' level of satisfaction with local educational institutions

Applicants with strong spreadsheet skills were reported to have relatively high need. 24% of respondents stated there was "great need" for workers with strong spreadsheet skills and another 30% reported "some need". Among the skills with the least need, only 30% of respondents stated
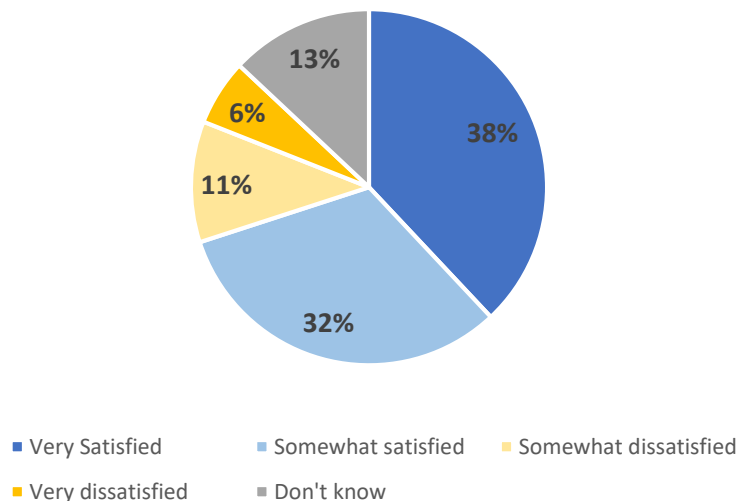
there was at least some need for those that "can create effective PowerPoint presentations" and only 28% stated there was at least some need for those that can "understand and can use QuickBooks".

40% of respondents identified specific programs that did a good job at preparing workers for their firm.
Among the most commonly cited were the culinary and hospitality management program, ServeSafe
certification, and the SBCC nursing program. **54% of respondents** identified additional specific training
programs, educational degrees, or certificate programs that would be helpful. Among the most
commonly cited programs were English Second Language courses, social skills, and entry-level home care
aid training.

**The potential training program which garnered the most interest from respondents was a program which
"develop[s] an apprentice-type program for your future employees".** 21% of respondents were "very
interested" and an additional 31% were "somewhat interested". Another potential program that
generated substantial interest was a program that aids in the "Sourcing and pre-screening of interns".
13% of respondents were "very interested" in this potential program and another 30% were "somewhat
interested". These two potential programs have potential to work in tandem; existing students could be
screened and offered internships throughout the course of their program, while the program
simultaneously provides direct experience and future apprenticeship-type opportunities for the students
of best-fit upon completion. Creating these programs with the right employers is already a step in the
right direction—76% of respondents said they would be willing to receive follow-up contact.

REGIONAL JOB QUALITY ANALYSIS

Job Quality Analysis Summary

The SBCC service region has a relatively normal
proportion (comparative to state and national
levels) of Tier 1 jobs, which are high-skill, high-
wage occupations. Furthermore, Tier 1 jobs
have experienced the most growth between
2010-2018. The SBCC region has a relatively
high proportion of Tier 3 jobs. Tier 3 jobs are
lower-skill, lower-wage jobs. The Tourism,
Hospitality, and Recreation industry, the largest

Employment trends and economic snapshots are important in analyzing job quantity but they fall short in analyzing job quality. Educational attainment, training, and experience are often associated with employment opportunity, career growth, and potential earnings. Based on these elements, most occupations can be categorized into one of three occupational tiers that provide more insight into job quality.

The three-tiered system used in this study is largely defined by current wage data, general educational attainment, and skills requirements. They are as follows:

industry in the SBCC service region, is generally comprised Tier 3 occupations.

Why is this Important?

Job quality represents a critical metric in understanding economic sustainability. Since tier 3 employment does not typically provide enough income for people to afford to live in the region, to improve job and life quality, the number of tier 1 and tier 2 jobs should increase so that more people are able to live and work in the SBCC region.

Tier 1 Occupations are typically the highest-paying, highest-skilled occupations in the economy. In 2018, the median annual wage for Tier 1 occupations in the SBCC Service region was approximately $94,095 a year. This occupational category includes positions such as managers (e.g., Chief Executives and Sales Managers), professional positions (e.g., Lawyers and Physicians) and highly-skilled technology occupations, such as scientists, engineers, computer programmers, and software developers.

Tier 2 Occupations are typically the middle-skill, middle-wage occupations. In 2018, the median annual wage for Tier 2 occupations in the SBCC Service region was approximately $50,032 a year. This occupational category includes positions such as technicians, teachers, office and administrative positions (e.g., Accounting Clerks and Secretaries), and manufacturing, operations, and production positions (e.g., Assemblers, Electricians, and Machinists).

Tier 3 Occupations are typically the lowest-paying, lowest-skilled occupations that have historically provided the largest portion of employment in the region. In 2018, the median annual wage for Tier 3 occupations in the SBCC Service region is approximately $30,101 a year. These occupations include positions such as security guards, food service and retail positions, building and grounds cleaning positions (e.g., Janitors), and personal care positions (e.g., Home Health Aides and Child Care Workers).

Since 2010, Tier 1 jobs have experienced the most growth (16%), followed by Tier 3 (13%) and Tier 2 (7%). The tier 1 occupations that grew the most during this timeframe were Computer Occupations (1,015 additional jobs), Health Diagnosing and Treating Practitioners (725), and Business Operations Specialists (599). The Tier 2 occupations that experienced the most growth were Sales Representatives (530 additional jobs), Construction Trade Workers (507) and Health Technologists and Technicians (263). Among the Tier 3 occupations with that grew the most during this time were Other Personal Care and Service Workers (1,659 additional jobs) and Food and Beverage Serving Workers (1,634).[28]

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[28] Emsi 2019.1 QCEW and non-QCEW

Figure 26. Employment Growth in the SBCC Service Region by Occupational Tier, 2010-2018[29]
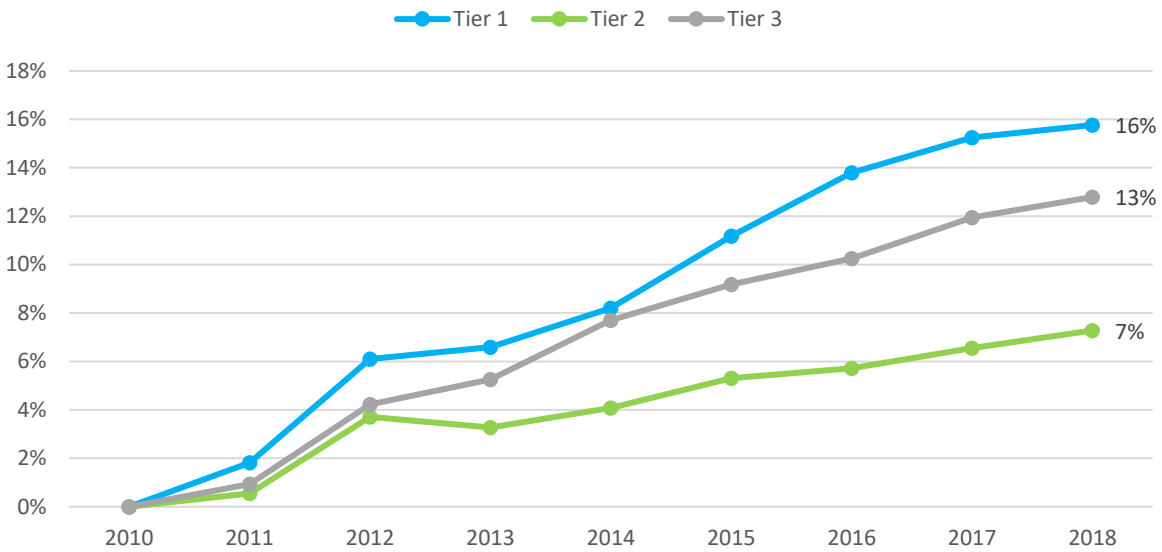
Due to the divergence in growth rates among tiers, Tier 1 jobs have increased in the share of occupational tier distribution, while Tier 2 jobs have mildly declined in share. Tier 3 occupations make up nearly half of all employment in the SBCC service region, while Tier 1 jobs account for about a fifth of all jobs (Table 2).

Table 2. Occupational Tier Distribution in SBCC region (2010-2018)[30]

Tiers	2010	2011	2012	2013	2014	2015	2016	2017	2018
Tier 1	21.0%	21.2%	21.3%	21.3%	21.3%	21.5%	21.8%	21.8%	21.7%
Tier 2	28.8%	28.7%	28.6%	28.4%	28.1%	28.0%	27.8%	27.6%	27.6%
Tier 3	50.2%	50.1%	50.1%	50.3%	50.6%	50.5%	50.4%	50.6%	50.6%

When compared to national and state averages, the SBCC service region has a greater proportion of Tier 3 jobs (Figure 27). A lack of Tier 1 and 2 jobs can stifle economic mobility and sharpen inequality.

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[29] Emsi 2019.1 QCEW and non-QCEW
[30] Emsi 2019.1 QCEW and non-QCEW

Figure 27. Job Composition by Region (2018)[31]
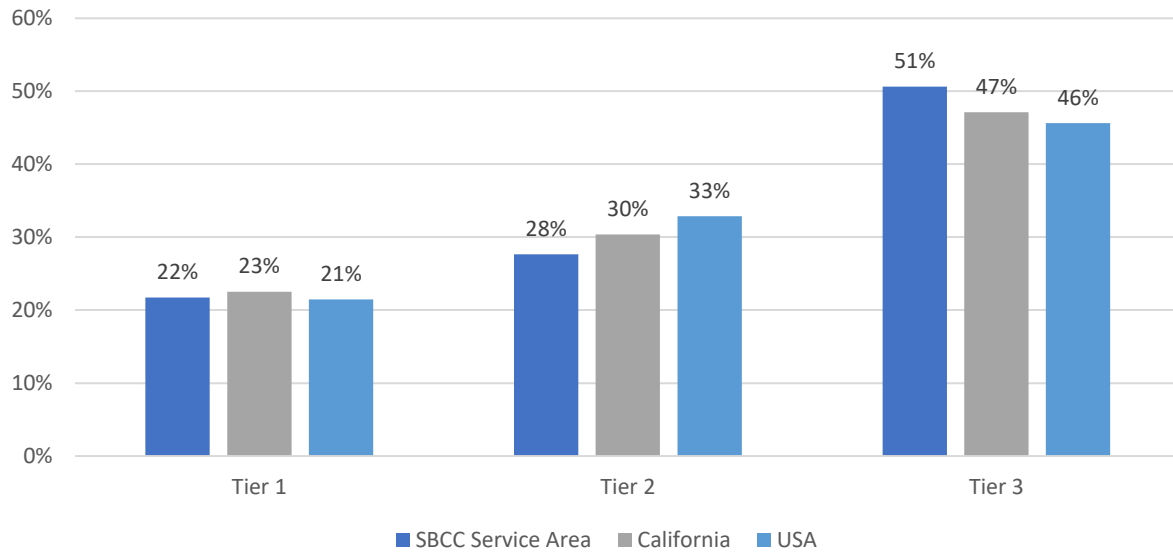
Employment growth across all three tiers has been slower in the SBCC region than both statewide and national averages. Though Tier 1 growth was the strongest tier-growth in SBCC, it grew 4 percentage points less than the national average and 10 percentage points less than the California average. While Tiers 2 and 3 in the SBCC grew by nearly the amount as the national rate, the statewide growth exceeded the growth rates by 7 and 6 percentage points respectively (Figure 28).

Figure 28. Employment Growth by Occupational Tier and Region, 2010-2018[32]

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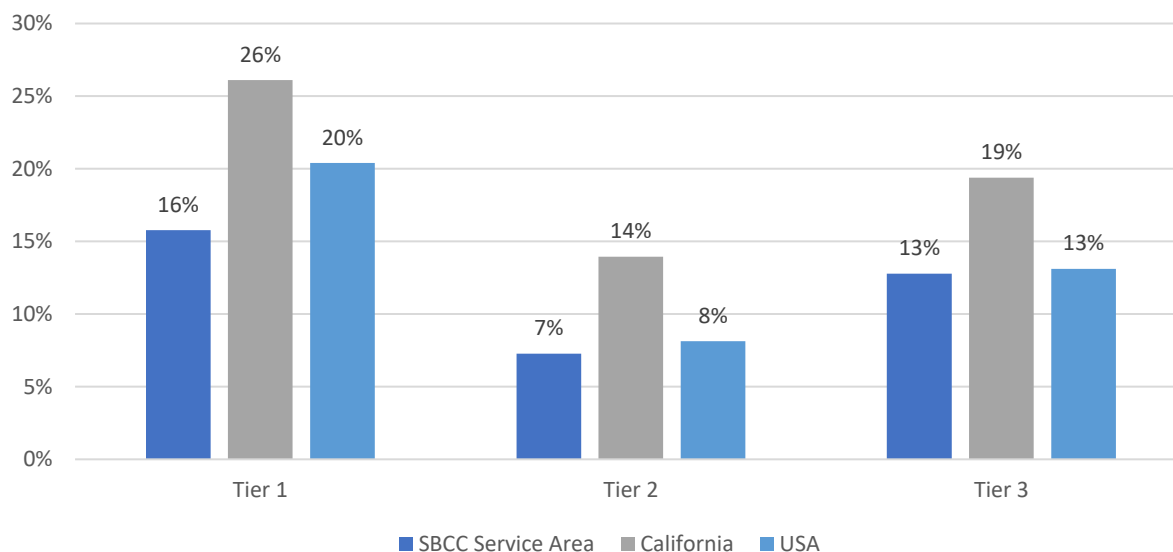
[31] Emsi 2019.1 QCEW and non-QCEW
[32] Emsi 2019.1 QCEW and non-QCEW

While an abundance of Tier 1 jobs signals positive growth of sustainable jobs within the region, Tier 3 jobs often do not provide enough income for residents to live in costly locations such as Santa Barbara County. In fact, more than two Tier 3 jobs would be needed to support a family of four (one parent working, two children) (Table 3).

Table 3. Number of Jobs a Family of 2 Adults (One Working) and 2 Children Need to Meet Self-Sufficiency in Santa Barbara County33

	Median Annual Wage	Number of Jobs to Meet Family Self-Sufficiency
Tier 1	$94,095	0.69
Tier 2	$50,032	1.29
Tier 3	$30,101	2.15

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[33] Source: Living Wage Calculator - http://livingwage.mit.edu/counties/06083

INDUSTRY CLUSTERS

Industry clusters are geographic concentrations of businesses that typically share a common market and exchange supporting goods and services. Unlike the traditional industry sector, clusters are comprised of interrelated industries complementing various elements of a supply chain, creating a local ecosystem of businesses. Industry clusters outline local economic drivers, emphasizing job growth and quality allowing the Santa Barbara City College to:

1. **Engage with local employers** that are central to the area's economy.

2. **Provide valuable information to current workers and job-seekers** looking to develop new skills and follow career pathways.

3. **Design programs that best support the current and future regional workforce demand.**

Industry Clusters Analysis Summary

The SBCC service region has close to a fifth of its workforce (18%) in the Tourism, Hospitality, and Recreation industry cluster—a cluster that, on average, has lower rates of compensation. Occupations within the Information and Communications Technology, Finance, Banking, Insurance, and Real Estate, and the Biotechnology and Biomedical industry clusters have experienced strong growth in recent years and offer high-wages.

Why is this Important?

These industry clusters offer opportunities for training and workforce development as we look for economic and workforce opportunities in the region.

4. Ensure that **job-seekers can transition into employment with sustainable wages** and strong career opportunities.

Tourism, Hospitality & Recreation (THR), Education & Knowledge Creation (EKC), and Healthcare provide the largest number of jobs among all industry clusters—approximately 45% of all jobs in the area. These three clusters grew by between 7% to 44% since 2010. Not surprisingly, THR and EKC have job concentrations in the region that are 20% to 23% above the national averages. The industry cluster with the highest job concentration in the region is Biotechnology & Biomedical Devices (B&BD) (194% more concentrated in the Santa Barbara City College service region than the national average concentration), which also happens to provide some of the highest average wages in the region.

The table and graph below show the industry clusters with the highest average earnings per worker in the area, including Information & Communication Technologies (ICT), Energy, Defense, Aerospace & Transportation Manufacturing (DATM), Biotechnology & Biomedical Devices (B&BD), Public Services & Infrastructure, and Water. These industry clusters offer above average salaries of over $92,000 (SBCC's average is $68,294) and, with exception of DATM and Public Services & Infrastructure, all have experienced employment growth since 2010 and provide a total of 21,811 jobs, or 19.4% of all jobs in the SBCC region (Table 4 and Figure 29).

Table 4. Industry Cluster Overview – High Wage Clusters[34]

Industry Clusters	2018 Employment	% Growth since 2010	Earnings per Worker (2018)	2018 LQ*
Information & Communication Technologies (ICT)	5,744	68%	$143,701	0.93
Biotechnology & Biomedical Devices (B&BD)	2,630	34%	$129,750	2.94
Defense, Aerospace & Transportation Manufacturing (DATM)	1,727	-37%	$124,130	0.80
Energy	957	26%	$110,728	1.10
Public Services & Infrastructure	6,204	-5%	$99,944	0.79
Water	164	152%	$97,486	0.59
Financial & Banking, Insurance, Real Estate (FIRE)	4,385	7%	$92,749	0.79

*Note: A location quotient (LQ) above 1 means a job concentration that is higher than the national average; a LQ below 1 represents a regional job concentration that is below national average.

Figure 29: High-Wage Industry Clusters[35]
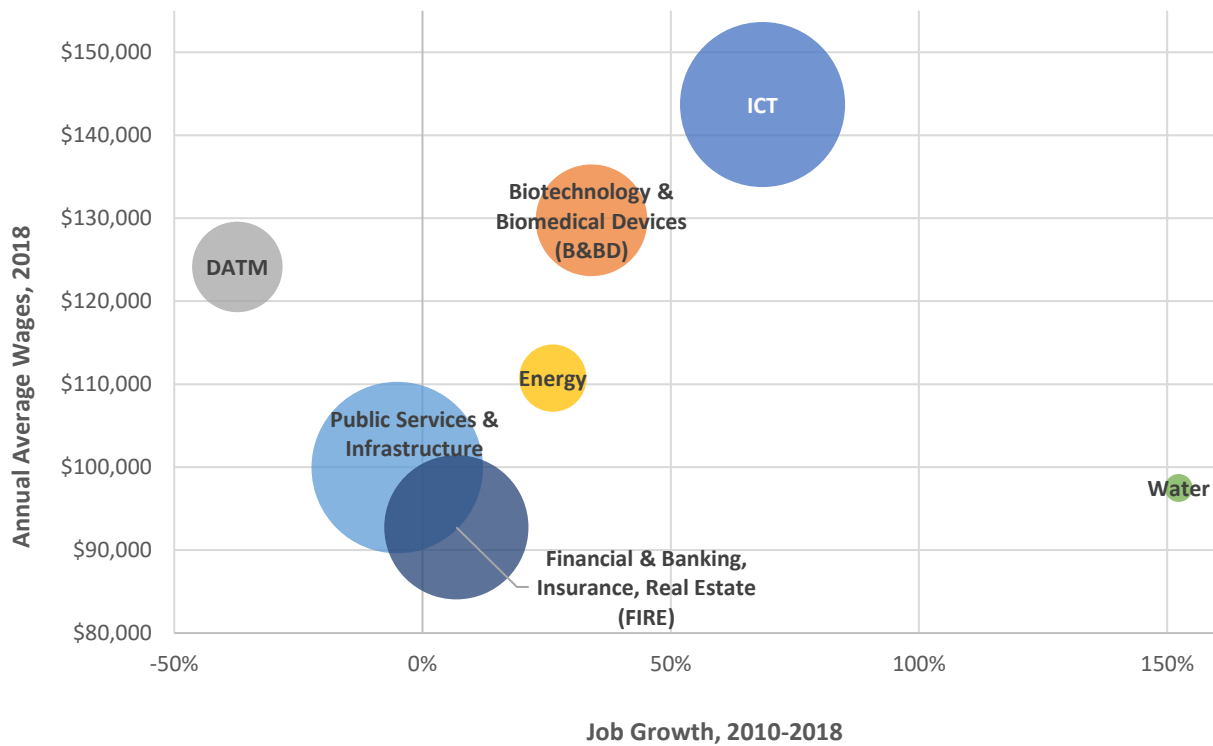
The table and graph below illustrate the middle-wage industry clusters, which provide average earnings between $68,734 and $77,427 per year. Education & Knowledge Creation is the largest medium-wage source of employment in the SBCC service region, with a total of 17,723 jobs in 2018. This industry, which has a job concentration 21% higher than the national average, has increased by 7% since 2010 and provides average wages of $68,734. Among all medium-wage clusters, logistics has increased the most since 2010, with a growth rate of 33%. Conversely, Professional & Business services and Other Manufacturing experienced an employment declines of 1% during the same period (Table 5 and

Figure 30).

Table 5: Industry Cluster Overview – Medium-Wage Clusters [36]

Industry Clusters	2018 Employment	% Growth since 2010	Earnings per Worker (2018)	2018 LQ
Building & Design	7,187	10%	$77,427	0.89
Professional & Business Services	9,791	-1%	$75,321	0.99
Other Manufacturing	1,825	-1%	$74,899	0.50
Logistics	2,524	33%	$69,736	0.72
Education & Knowledge Creation	17,723	7%	$68,734	1.21

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[36] Emsi 2019.1 QCEW and non-QCEW

Figure 30: Medium-Wage Industry Clusters[37]

Job Growth, 2010-2018
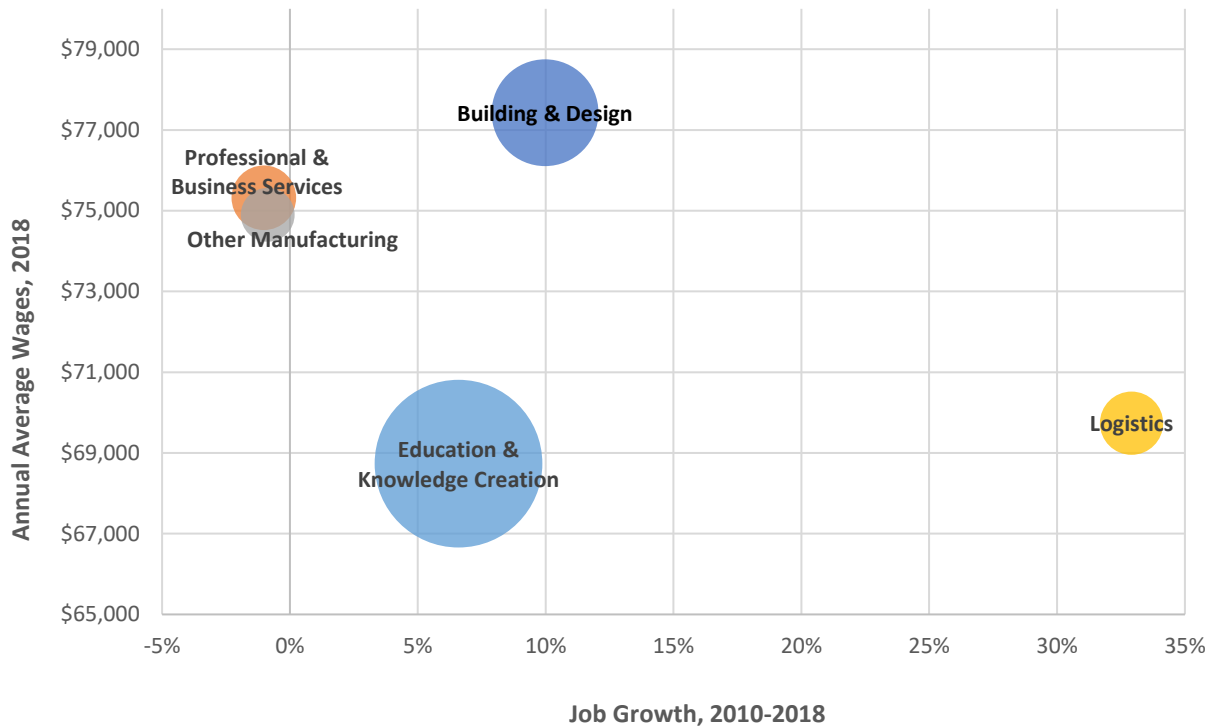
The table and figure below show the low-wage industry clusters, which provide average wages between $30,749 and $65,350. These clusters are responsible for over 50,717jobs—more than four in every ten (45%) jobs in the SBCC region. Except for Other Services (-16%) and Information and Communications (-4%), all have experienced employment growth since 2010. With exception of Tourism, Hospitality & Recreation, which has a job concentration that is 24% above the national average, all other low-wage clusters have job concentrations at or below the national average (Table 4 and Figure 31).

Table 6: Industry Cluster Overview – Low-Wage Clusters [38]

Industry Clusters	2018 Employment	% Growth since 2010	Earnings per Worker (2018)	2018 LQ
Healthcare	12,978	44%	$65,350	0.99
Information & Communications	1,413	-4%	$65,204	0.69
Agriculture & Food	2,471	21%	$47,060	0.45
Retail	9,452	3%	$40,497	0.83
Other Services	4,640	-16%	$38,538	0.84
Tourism, Hospitality & Recreation	19,763	26%	$30,749	1.24

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[37] Emsi 2019.1 QCEW and non-QCEW
[38] Emsi 2019.1 QCEW and non-QCEW

Figure 31: Low-Wage Industry Clusters[39]
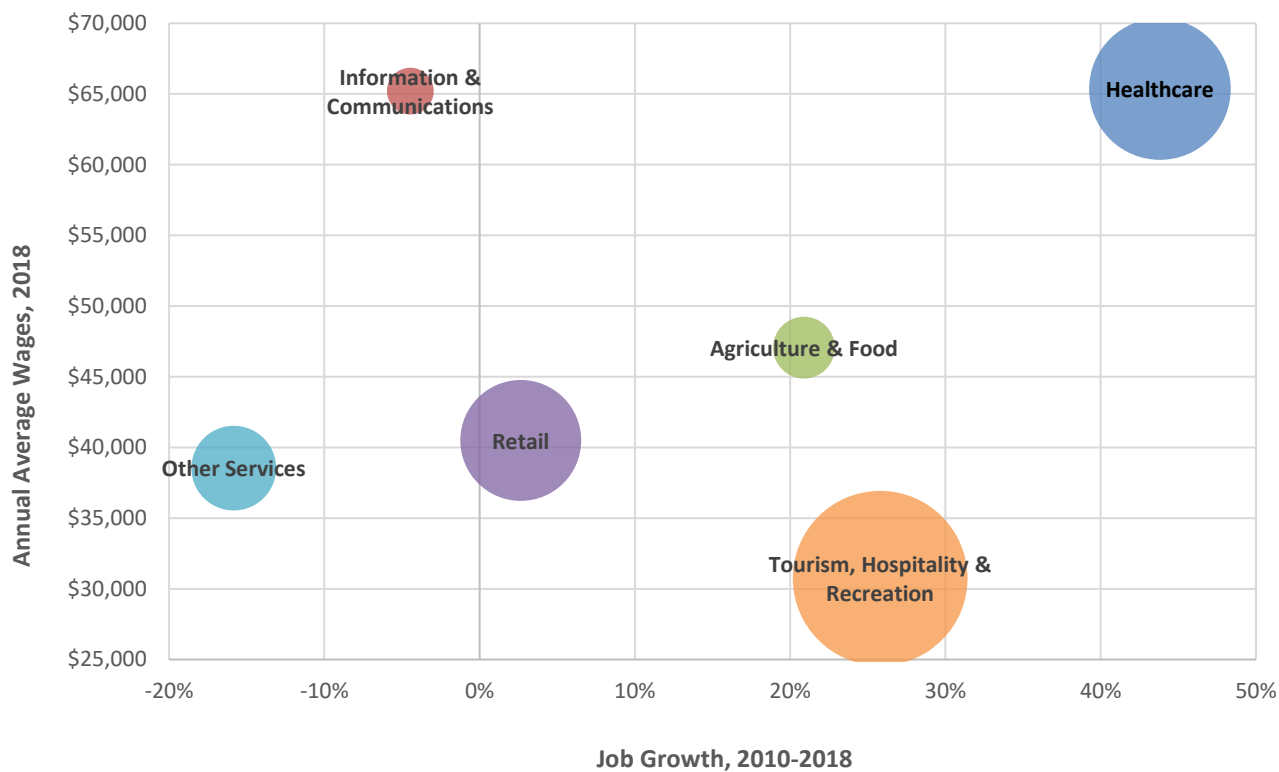
SELECTED REGIONAL CLUSTERS ANALYSIS

From the 18 standard industry clusters, **five** were selected given their overall employment, job concentration, growth potential, provision of sustainable wages, and strong career pathways opportunities in the area. These regional clusters include: Biotechnology & Biomedical Devices (B&BD), Information & Communication Technologies (ICT), Financial & Banking, Insurance, Real Estate (FIRE), Building & Design, and Healthcare (Figure 32).

Figure 32. Selected Industry Clusters in the Santa Barbara City College Service Region[40][41]
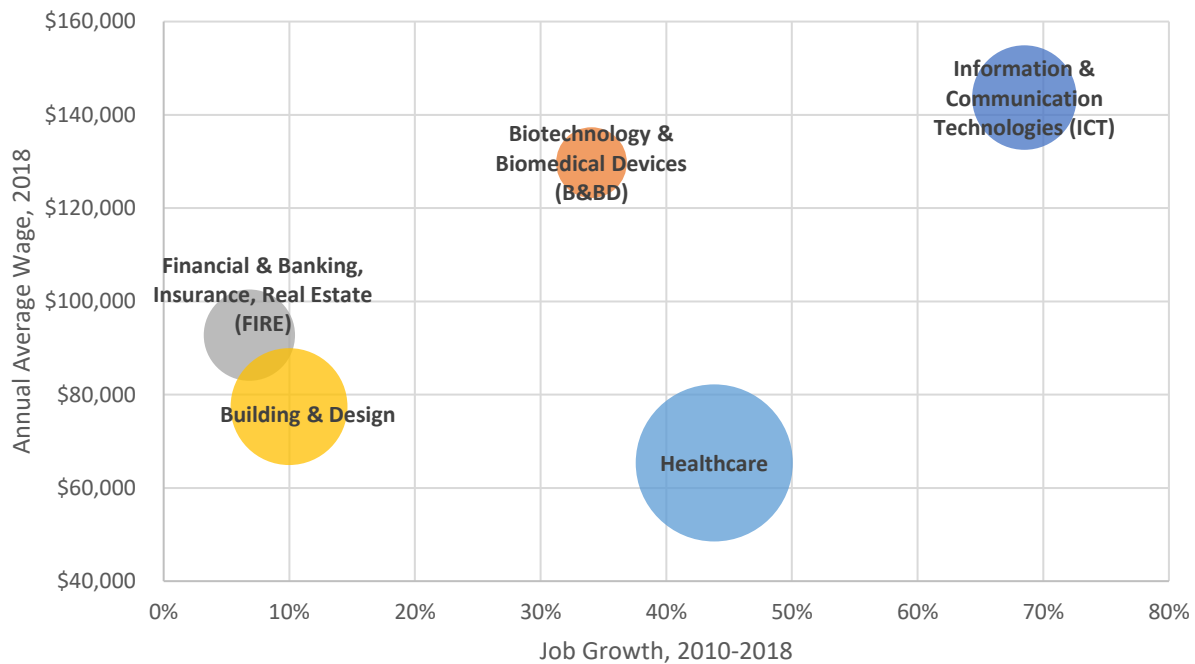
Clusters with Above Average Wages

Information and Communications Technology
The Information and Communications industry cluster provides the highest average wages among all seven clusters, or approximately $143,701 annually.   Software Developers for Applications and Systems Software are the two most common occupations in this industry cluster and pay a median hourly wage of $46.85 and $59.02 respectively. Other occupations in this industry cluster require less education and training and a starting point in a career pathway. Roles such as Computer User Support Specialists and Sales Representatives offer entry-level roles into this industry (Table 7).

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[40] Emsi 2019.1 QCEW and non-QCEW
[41] Size of bubble is indicative of number of jobs in region.

Table 7. Top Occupations in the Information and Communications Technology (ICT) Industry Cluster in SBCC region[42]

Occupations	2018 Jobs	% Change (2010-2018)	Median Hourly Earnings
Software Developers, System Software	499	45%	$59.02
Software Developers, Applications	495	115%	$46.85
Computer User Support Specialists	241	93%	$28.70
Sales Representatives, Services, All Other	235	194%	$23.31
General and Operations Managers	182	100%	$52.79

The Information and Communications Technology industry in the SBCC service area is made up predominantly of Tier 1 jobs (Table 5). This means most of the occupations in this industry are high skill, high wage jobs. Despite the concentration of these jobs, there are still career pathways in this industry cluster. Roles such as Computer User Support Specialist offer positions that require relatively little education but allow access to the industry.

Table 8. Information Communications and Technology Job Quality (2018)[43]

Industry Cluster	Tier 1	Tier 2	Tier 3
Information and Communications Technology (ICT)	65%	22%	13%

Biotechnology and Biomedical Devices

The Biotechnology and Biomedical Devices industry cluster has an average wage of $129,750 annually. Several occupations in the industry cluster have experienced rapid growth over the past seven years, including Software Developers (System Software), Electrical, Electronic, and Electromechanical Assemblers (Except Coil Winders, Tapers, and Finishers), Aerospace Engineers, and Phlebotomists (Table 9).

Table 9. Top Occupations in Biotechnology and Biomedical Devices in SBCC Service Region[44]

Occupations	2018 Jobs	% Change (2010-2018)	Median Hourly Earnings
Assemblers and Fabricators	125	7%	$15.34

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[42] Emsi 2019.1 QCEW and non-QCEW
[43] Emsi 2019.1 QCEW and non-QCEW
[44] Emsi 2019.1 QCEW and non-QCEW

Software Developers, Systems Software	99	80%	$59.02
Ophthalmic Laboratory Technicians	97	31%	$14.49
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	85	93%	$18.11
Aerospace Engineers	70	89%	$56.33

The Biotechnology and Biomedical Devices industry cluster contains a relatively uniform mix of tier 1, 2, and 3 jobs within the SBCC service region (Table 10). This indicates that career pathways and upward mobility for those within the industry is relatively strong.

Table 10. Biotechnology and Biomedical Devices Job Quality in SBCC Service Region (2018)[45]

Industry Cluster	Tier 1	Tier 2	Tier 3
Biotechnology and Biomedical Devices (B&BD)	40%	26%	34%

Finance, Banking, Insurance, and Real Estate (FIRE)
Workers in the Finance, Banking, Insurance, and Real Estate industry cluster earn an average of $92,749 per year. Counter and Retail Clerks were among the fastest growing occupations, increasing by 59% between the years of 2010-2018 (Table 11).

Table 11. Top Occupations in Finance, Banking, Insurance, and Real Estate in SBCC Service Region[46]

Occupations	2018 Jobs	% Change (2010-2018)	Median Hourly Earnings
Insurance Sales Agents	336	21%	$27.62
Securities Commodities, and Financial Services Sales Agents	326	16%	$24.13
Maintenance and Repair Workers, General	280	24%	$20.31
Counter and Retail Clerks	267	59%	$13.58
Tellers	241	-27%	$14.32

---

[45] Emsi 2019.1 QCEW and non-QCEW
[46] Emsi 2019.1 QCEW and non-QCEW

Jobs across the Finance, Banking, Insurance, and Real Estate industry cluster are spread relatively uniformly across the three tiers. This means there is also strong opportunity for career pathways and upward mobility as workers within the industry may find it easier to advance their career within the industry cluster (Table 12).

Table 12. Finance, Banking, Insurance, Real Estate Job Quality in SBCC Service Region (2018)[47]

Industry Cluster	Tier 1	Tier 2	Tier 3
Finance, Banking, Insurance, and Real Estate	31%	40%	29%

Clusters with Medium Wages

Healthcare
The average occupation in the Healthcare industry cluster earns $65,350 per year. These the top occupations in this industry have all experienced growth of at least 13% between 2010-2018. The demand for Personal Care Aids in the SBCC service region has risen significantly—the number of positions has increased by 335% since 2010 (Table 13).

Table 13. Top Occupations in the Healthcare Industry Cluster in the SBCC Service Region

Occupations	2018 Jobs	% Change (2010-2018)	Median Hourly Earnings
Personal Care Aids	2,469	335%	$11.60
Registered Nurses	1,338	35%	$47.62
Nursing Assistants	625	13%	$15.86
Medical Secretaries	402	31%	$20.14
Medical Assistants	368	57%	$17.71

Nearly half of the Healthcare industry cluster in the SBCC service region is comprised of Tier 3 jobs. Conversely, this means that 54% of jobs within this industry are medium-to-high-wage jobs.

Table 14. Healthcare Job Quality in SBCC Service Region (2018)[48]

Industry Cluster	Tier 1	Tier 2	Tier 3
Healthcare	27%	24%	49%

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[47] Emsi 2019.1 QCEW and non-QCEW
[48] Emsi 2019.1 QCEW and non-QCEW

Building and Design

The average occupation in the Building and Design occupation cluster earned $77,427 per year in 2018. Painters, Construction Laborers, and Office Clerks are among the top occupations with the greatest growth rates, growing 38%, 29%, and 27%, respectively, between 2010 and 2018 (Table 15).

Table 15. Top Occupations in the Building and Design Industry Cluster in the SBCC Service Region

Occupations	2018 Jobs	% Change (2010-2018)	Median Hourly Earnings
Carpenters	572	14%	$24.74
Painters, Construction and Maintenance	371	38%	$20.87
Construction Laborers	347	29%	$18.92
Office Clerks, General	288	27%	$16.24
Electricians	242	-3%	$27.83

The Building and Design industry cluster is comprised primarily of tier 2 occupations, though nearly three in ten workers fall under tier 2 occupations. The lack of tier 3 jobs in this industry cluster presents a potential barrier to would-be entry level workers. Most applicants to this sector need at least some experience or technical training. Conversely, high percentages in tier 1 and tier 2 indicate that most occupations in this industry cluster are medium-to-high paying (Table 16).

Table 16. Building and Design Job Quality in SBCC Service Region (2018)[49]

Industry Cluster	Tier 1	Tier 2	Tier 3
Building and Design	30%	58%	12%

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[49] Emsi 2019.1 QCEW and non-QCEW

CAREER PATHWAYS

Information & Communication Technologies

Entry-level

Sales Representatives

Customer Service Representatives

General Office Clerks

$19.20
Median Hourly Wage, 2018

143%
Growth, 2010-2018

High school diploma & short-to moderate-term on-the-job training

Mid-level

Computer User Support Specialists

Computer Network Support Specialists

Web Developers

$35.30
Median Hourly Wage, 2018

120%
Growth, 2010-2018

High school or more & moderate-term to no on-the-job training

Senior-level

Systems Software Developers

Applications Software Developers

General and Operations Managers

$52.89
Median Hourly Wage, 2018

32%
Growth, 2010-2018

Bachelor's degree & five years or more of work experience

Biotechnology & Biomedical Devices

Entry-level

Assemblers and Fabricators

Electrical, Electronic, and Electromechanical Assemblers

Sales Representative

$19.55
Median Hourly Wage, 2018

-4%
Growth, 2010-2018

High school or less & short-term on-the-job training

Mid-level

Phlebotomists

Clinical Laboratory Technologists and Technicians

Electrical and Electronics Engineering Technicians

$23.72
Median Hourly Wage, 2018

0%
Growth, 2010-2018

High school & none to to moderate on-the-job training

Senior-level

Software Developers

Aerospace Engineers

General and Operations Managers

$56.05
Median Hourly Wage, 2018

32%
Growth, 2010-2018

Bachelor's degree, about five years work experience, & no on-the-job training

Finance & Banking, Insurance, Real Estate

Entry-level

Insurance Sales Agents

Maintenance and Repair Workers
Counter and Rental Clerks

$20.50
Median Hourly Wage, 2018

31%
Growth, 2010-2018

High school diploma or less & short- to long-term on-the-job training

Mid-level

Computer Network Support Specialists

Insurance Appraisers

Paralegals and Legal Assistants

$32.02
Median Hourly Wage, 2018

30%
Growth, 2010-2018

High school diploma or Bachelor's & moderate-term on-the-job training

Senior-level

Securities Commodities and Financial Services Sales
Personal Financial Advisors

General Operations Managers

$46.50
Median Hourly Wage, 2018

19%
Growth, 2010-2018

Bachelor's degree & long-term to no on-the-job training

Healthcare

Entry-level

Personal Care Aides

Medical Secretaries

Receptionists and Information Clerks

$15.44
Median Hourly Wage, 2018

134%
Growth, 2010-2018

High-School Diploma or Post-secondary nondegree & moderate-term to no on-the-job training

Mid-level

Nursing Assistants

Medical Assistants

Dental Assistants

$17.26
Median Hourly Wage, 2018

27%
Growth, 2010-2018

High-School to Post-secondary non-degree & short-term to no on-the-job training

Senior-level

Registered Nurses

Physicians and Surgeons

Medical and Health Services Managers

$55.51
Median Hourly Wage, 2018

40%
Growth, 2010-2018

Bachelor's degree to doctoral or professional degree and internship/residency or less

Building and Design

Entry-level

Construction Laborers

Painters, Construction, and Maintenance

Carpenters

$21.51
Median Hourly Wage, 2018

22%
Growth, 2010-2018

High school or less & short-term on-the-job training

Mid-level

Bookkeeping, Accounting, and Auditing Clerks

HVAC and Refrigeration Mechanics and Installers

Architectural and Civil Drafters

$23.91
Median Hourly Wage, 2018

9%
Growth, 2010-2018

Less than a Bachelor's degree

Senior-level

Construction Managers

General and Operations Managers

Civil Engineers

$50.10
Median Hourly Wage, 2018

13%
Growth, 2010-2018

Bachelor's degree

APPENDIX A: POTENTIAL & CURRENT STUDENT SURVEY TOPLINES

Santa Barbara CC Region

Potential & Current - Student Survey

February 2019

n = 207

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**Introduction:**

Hello, may I please speak to _____. Hi, my name is _____ and I'm with an independent research firm calling on behalf of **Santa Barbara City College** (SBCC) to conduct a survey on how to better serve the community and we would like to get your opinions.

(If needed): This should only take a few minutes of your time.

(If needed): I assure you that we are an <u>independent</u> research agency and that all of your responses will remain strictly confidential.

(If needed): This is a study about issues of importance in your community – it is a survey only and we are <u>not</u> selling anything.

(If needed): This survey should only take a few minutes of your time.

(If respondent indicates that he/she is a city employee, council member, or elected official, thank him/her for his/her time and end the interview.)

(If the individual mentions the national do not call list, respond according to American Marketing Association guidelines): "Most types of opinion and marketing research studies are exempt under the law that congress recently passed. That law was passed to regulate the activities of the telemarketing industry. This is a legitimate research call. Your opinions count!")

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**Screener Questions**

SA. What is your home zip code? (USE ZIP CODES FROM THE SBCC SERVICE AREA)

| 100.0% | Qualifying zip code |
|--------|---------------------|
| 0.0%   | Don't know/ Refused |

SB. How old are you?

| | |
|---|---|
| 0.0% | Less than 18 years old |
| 25.6% | 18 to 25 years old |
| 18.4% | 26 to 35 years old |
| 15.5% | 36 to 45 years old |
| 10.1% | 46 to 55 years old |
| 14.0% | 56 to 64 years old |
| 16.4% | 65 years or older |
| 0.0% | Don't know/ Refused |

SC. What is the last grade you completed in school?

| | |
|---|---|
| 2.4% | Less than high school |
| 10.6% | High school diploma or GED |
| 30.0% | Some college |
| 10.6% | Post high school certificate or Associate Degree (A.A. or A.S.) |
| 26.1% | Four-year Bachelor's Degree (B.A. or B.S.) |
| 20.3% | Graduate school (M.S., MBA, M.A., Ph.D, M.D., J.D...) |
| 0.0% | Don't know/Refused |

``````````````````````````````````````````````````````````````````````````````````````````````````````````````````````

I. Introduction

Next, I would like to ask you about work and school in the region.

1. Are you currently working, either part-time or full-time for pay?

44.4%	Yes, full-time
30.4%	Yes, part-time
25.1%	No

2. If you wanted to get new skills to find a job or get promoted, where are the first two places you would go to find out about developing new skills for work? (ACCEPT FIRST TWO RESPONSES)

26.9%	Internet/Online

26.6%	Unspecific school/college
11.6%	Santa Barbara City College SBCC
8.2%	Community/career center
6.1%	Other Santa Barbara School (specific)
3.4%	Don't know/ Refused
2.9%	Internship
14.2%	Other

3. If you wanted to learn life-enhancement skills such as meditation, stress management, or a new language, where are the first two place you would go? (ACCEPT FIRST TWO RESPONSES)

24.9%	Internet/online
14.6%	Unspecific School/College
12.3%	Santa Barbara City College (SBCC)
8.9%	Yoga
7.2%	No/Non-response
6.7%	Community Center/Library
6.2%	Therapist/Doctor/other healthcare
4.9%	Specific Online Language Program
3.5%	Friend/family
3.0%	Other Santa Barbara school (specific)
7.9%	Other

4. Are you currently taking any courses or classes at **Santa Barbara City College School of Extended Learning (SBCC SEL, also known as Adult Education)**?

86.0%	No
6.3%	Yes, in-person
3.4%	Yes, online
3.4%	Yes, both in-person and online
1.0%	Don't know/ Refused

II**. Educational Profile**

[ASK Q5 – Q7 IF Q4=1 OR 2 OR 3; IF Q4= 4 OR 5 OR 6 SKIP TO Q8]

5. How did you hear about the SBCC School of Extended Learning (SEL) Programs?

48.1%	School website
40.7%	Family and friends

18.5%	Career Advisor
18.5%	Social Media
7.4%	Other (please specify)
7.4%	Don't know/ Refused

6. Are you currently taking classes to get a degree or a certificate, if so, which the degree or certificate?

63.0%	Yes (please specify degree or certificate)
25.9%	No
7.4%	Not sure
3.7%	Don't know/ Refused

7. Are you taking courses for work (to get a job, get a better job, or get promoted with your current employer), or to improve your quality of life, and/or to learn something new? [ALLOW MULTIPLE RESPONSE]

33.3%	Yes, to get a better job
29.6%	Yes, to improve my quality of life
22.2%	Yes, to learn something new
22.2%	Yes, to get a job
14.8%	Yes, to get promoted with current employer
3.7%	Other (please specify)
7.4%	Don't know/ Refused

8. Are you satisfied or dissatisfied with your current level of education and the employment opportunities it provides you? (GET ANSWER, THEN ASK:) Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?

35.3%	Very satisfied
39.6%	Somewhat satisfied
15.9%	Somewhat dissatisfied
5.8%	Very dissatisfied
3.4%	Don't know/ Refused

9. What are the challenges or obstacles you face or have faced getting the education and/or training you want? Are the following challenges considerable for you in getting the education and training you want?

	Considerable Challenge	Somewhat a Challenge	Neither Agree nor Disagree	Not a Challenge	It Depends	Don't know/ Refused
Paying for tuition or fees	35.7%	27.5%	10.6%	17.9%	6.8%	1.4%
Finding programs and courses that work within your schedule	19.8%	39.1%	13.5%	21.7%	3.9%	1.9%
Knowing which education or training programs or courses are worth investing the time and money in	16.4%	42.5%	17.4%	16.9%	3.9%	2.9%
Finding affordable and effective daycare options for young children while I go to school or training	6.3%	12.1%	8.7%	62.8%	1.4%	8.7%
Getting transportation to and from the program	3.4%	10.6%	16.4%	65.7%	2.4%	1.4%

10. Are there or has there been other challenges or obstacles to getting the education or training you want that we have not discussed, if yes can you briefly describe them?

65.5%	None/no
8.6%	Money/tuition cost
8.6%	Lack of time/ must work
5.1%	Life instances (pregnancy, death in family, etc.)
3.0%	Not sure it's worth the investment
3.0%	Elderly/ Disabled
1.5%	Not applicable/ already educated
4.6%	Other

11. Next, I am going to ask you about different programs and courses that could be offered at Santa Barbara City College.

For each of the following programs or courses that could be offered at **Santa Barbara City College School of Extended Learning (SBCC SEL)**, please tell me if you are very interested, somewhat interested or not interested in that program or coursework for you or someone in your household?

	Very Interested	Somewhat Interested	Not Interested	Don't know/ Refused
Programs that support small businesses and entrepreneurship	35.3%	34.3%	28.0%	2.4%
Courses that teach business and technology skills in the workplace	34.8%	34.3%	29.0%	1.9%

Courses that teach life-enhancement skills and improve my quality of life	31.4%	46.4%	20.3%	1.9%
Courses that teach computer skills such as programming and web development	30.0%	40.1%	28.0%	1.9%
Courses that prepare you to get an Associate or bachelor's degree	23.7%	27.5%	46.4%	2.4%
Courses that teach medical certifications to work in the healthcare industry	22.2%	19.8%	56.0%	1.9%
Courses that teach life skills and greater independence for adults with disabilities	15.5%	23.7%	58.9%	1.9%
Apprenticeships for pre-apprenticeship programs in trades such as carpentry, plumbing, HVAC, and solar installations	14.0%	15.0%	68.1%	2.9%
Courses to get your high school diploma or equivalency	10.6%	7.2%	79.2%	2.9%
Courses that develop better English language skills in the workplace	11.6%	20.3%	65.7%	2.4%
Courses for individuals who want to become U.S. Citizens	10.1%	10.1%	75.4%	4.3%
Classes that help you get in a dental training program	7.7%	11.6%	78.3%	2.4%

12. Are there any other courses or programs that you would want to see offered at **SBCC School of Extended Learning** that we have not already discussed?

68.9%	None/ No
5.2%	Language
5.2%	Specific occupation training
4.7%	Technical skill (welding, auto repair, etc.)
3.1%	Art/ Photography
3.1%	Personal Finance
2.6%	Dancing
7.3%	Other

III. Employment Profile

[ASK Q13 IF Q1=1 OR 2; IF Q2=3, SKIP TO Q20]

13. Are you currently working at more than one job for pay?

31.0%	Yes
68.4%	No
0.6%	Don't know/ Refused

IF Q13=1 THEN READ "When we ask about a current job, please talk about the one where you typically work the most hours a week."

[ASK Q14 IF Q1=2, OTHERWISE SKIP TO Q15
    14. Would you prefer to have a full-time job?

42.9%	No
31.7%	Yes
25.4%	Depends
0.0%	Don't know/ Refused

    15. Are you currently working in a permanent position or one that is temporary, contract or seasonal?

72.3%	Permanent
16.8%	Temporary, or seasonal
6.5%	Contract
4.5%	Don't know/ Refused

    16. Does your employer pay for healthcare benefits for you and your family?

49.7%	No
29.7%	Yes, but just for myself
18.7%	Yes, for me and my family
1.9%	Don't know/ Refused

[ASK Q17 IF Q15= 2 OR 3, OTHERWISE SKIP TO Q18]
    17. Would you prefer to have a permanent position?

50.0%	Yes
36.1%	Depends
13.9%	No
0.0%	Don't know/ Refused

    18. What industry are you currently working in?

16.8%	Retail or Food Service
19.4%	Healthcare

13.5%	Education
10.3%	Technology
12.3%	Professional or Business Services
4.5%	Construction (Building & Design)
3.9%	Manufacturing
1.9%	Public Sector
22.6%	Other (please specify)
0.0%	Don't know/ Refused

19. What is your occupation or positional title?

24.2%	Manager
11.4%	Customer service (barista, server, cashier)
9.4%	Finance
8.7%	Owner/ CEO
8.7%	Healthcare (nurse, phlebotomist, etc.)
6.0%	Technical role (mechanic, technician)
4.7%	Sales/Marketing
2.7%	Maintenance/ Sanitation
24.2%	Other (specific)

III. Underemployment Assessment

20. Are you satisfied or dissatisfied with your opportunities for career advancement and wage growth? (GET ANSWER, THEN ASK:) Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?

21.7%	Very satisfied
47.8%	Somewhat satisfied
15.9%	Somewhat dissatisfied
6.8%	Very dissatisfied
7.7%	Don't know/ Refused

21. Are you currently looking for a job?

28.0%	Yes
68.1%	No
3.9%	Don't know/ Refused

IV. Unemployment Profile

[ASK Q22 - Q23 IF Q1=3, OTHERWISE SKIP TO Q24]

22. Which of the following descriptions is closest to your current situation?

40.4%	Retired and no longer looking for paid employment
26.9%	Other (please specify)
13.5%	Unemployed (includes those looking for work and those not looking)
11.5%	Part-time student who is not looking for paid employment
5.8%	Homemaker or stay at home parent
1.9%	Don't know/ Refused

[ASK Q23 IF Q1=3, OTHERWISE SKIP]

23. How long have you been unemployed?

5.8%	Up to 4 weeks
3.8%	More than 4 weeks and up to 12 weeks
5.8%	More than 12 weeks and up to 6 months
3.8%	More than 6 months and up to 1 year
65.4%	More than 1 year
15.4%	Don't know/ Refused

V. Occupational Preference and Economic Security Profile

Next, I would like to ask a few brief questions about your employment preferences.

24. Has there been specific careers or positions that you wanted to find employment in that needed education or training beyond High School, if yes please identify the career or position?

45.9%	No, there has not been a specific career or position that I wanted that required education or training beyond high school
43.0%	Yes (please specify)
11.1%	Don't know/ Refused

25. Are you currently working in that career or position, or do you expect to in the future?

34.8%	Yes, I am currently working in that field
22.5%	Yes, I expect to be working in that field in the future
20.2%	No, I am not working in that field and do not expect to in the future
18.0%	Not sure if I will be working in that field in the future
4.5%	Don't know/ Refused

26. What have been the **challenges or obstacles** you have faced getting employed in the career or positions that you want to work in? Have the following challenges been considerable for you in getting employed in your career of choice.

	Considerable Challenge	Somewhat a Challenge	Neither agree nor disagree	Not a Challenge	It Depends	Don't know/ Refused
Getting relevant work and/or industry experience	16.9%	31.4%	16.9%	29.0%	2.4%	3.4%
Getting the academic degree and/or certification needed	18.8%	28.5%	15.9%	30.4%	2.4%	3.9%
Performing well in interviews	14.5%	26.1%	16.4%	33.8%	5.8%	3.4%
Getting the technical training as well as developing technical skills and expertise	14.5%	33.8%	13.0%	30.4%	5.3%	2.9%
Getting comfortable and confident communicating with employers and those hiring	17.9%	24.2%	15.9%	34.8%	4.3%	2.9%
Developing resumes and related materials that demonstrate your qualifications	11.6%	33.8%	13.5%	35.3%	2.9%	2.9%
Getting the free-time needed to focus on my career goals	23.2%	27.5%	15.5%	29.0%	1.9%	2.9%
Getting the money and resources needed to invest in my career goals	27.5%	27.5%	16.4%	22.7%	2.4%	3.4%

To wrap things up, I just have a few background questions for statistical purposes only.

SD. Are there any languages spoken in your home other than English? (If yes, which ones?

70.5%	No
27.1%	Yes (please specify)

2.4%	Don't know/ Refused

SE. What ethnic group do you consider yourself a part of or feel closest to? (IF HESITATE, READ):

61.8%	White
20.8%	Hispanic, Latino
12.6%	Mexican, Mexican-American, Chicano
5.8%	Black or African American
2.4%	Hispanic Other
2.4%	American Indian/Alaskan Native
1.9%	Filipino
1.9%	Asian Other
1.4%	South American
1.4%	Asian Chinese
1.0%	Asian Indian
1.0%	Asian Vietnamese
1.9%	Central American
0.5%	Asian Japanese
0.5%	Asian Korean
0.5%	Pacific Islander Other
0.0%	Asian Laotian
0.0%	Asian Cambodian
0.0%	Pacific Islander Guamanian
0.0%	Pacific Islander Hawaiian
0.0%	Pacific Islander Samoan
3.9%	Don't know/ Refused

SI. What is your Gender?

64.7%	Female
34.8%	Male
0.5%	Non-Binary

Those are all of the questions we have for you. Thank you very much for participating!

First Name of Respondent _____

Phone _____

Date of Interview _____

Name of Interviewer _____

Time of Interview _____

Type of Interview

    1   Online Panel (Potential)

    2   Online email-invite from adult school (Current)

    3   Phone (Potential)

    4   Paper

APPENDIX B: EMPLOYER SURVEY TOPLINES

[bw] RESEARCH PARTNERSHIP

SBCC SEL

Employer Survey

December 2018

N= 201

SBCC Service Area

Employer Survey

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Introduction:

[FIRMS WITH LESS THAN 25 EMPLOYEES]

Hello, my name is _____. May I please speak to a senior manager or someone involved with staffing at [organization]?

[IF NEITHER A MANAGER OR SOMEONE WITH STAFFING IS AVAILABLE] Can I speak to a decision maker at your location?

[FIRMS WITH MORE THAN 25 EMPLOYEES]

Hello, my name is _____. May I please speak to someone involved in Human Resources or staffing at [organization]?

[IF NEITHER A MANAGER OR SOMEONE WITH STAFFING IS AVAILABLE] Can I speak to a decision maker at your location?

Hello, my name is _____ and I'm calling on behalf of the **Santa Barbara City College (SBCC) School of School of Extended learning** who would value your participation in a brief survey about the region's talent.

**(If needed):** This survey has been commissioned by the SBCC, which is committed to supporting the County's businesses and job-seekers.

**(If needed):** The survey is being conducted by BW Research, an independent research organization, and should take approximately ten minutes of your time.

**(If needed):** Your individual responses will **not** be published; only aggregate information will be used in the reporting of the survey results.

**(If needed):** The SBCC develops innovative strategies that help students achieve their educational and economic goals.

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Screener Questions

A. Are you involved in staffing or hiring decisions at your firm or organization? (If not, could you please connect me to the appropriate person?)

       100% Yes

B. Does your company or organization have one or more locations in Santa Barbara County? [IF YES] How many locations and in which cities?

100%   Yes

SECTION 1 – Firm Profile

I'd like to begin by asking you a few general questions about your firm and your current employees. For this survey, **please only answer for your current business location**. If your firm has other locations, please do not include their data.

1. Including all full-time and part-time employees, how many **permanent** employees work at your location? [DO NOT ACCEPT 0 AS A RESPONSE]

    46.8   Average

    10   Median

2. If you currently have [INSERT Q1] full-time and part-time **permanent** employees at your location, how many more or fewer employees do you expect to have at your location 12 months from now?

    56%   Same number of employees
    39%   More
    2%   Fewer
    3%   Don't know

3. Including all full-time and part-time employees, how many **temporary** [IF NEEDED: this includes seasonal, contract and any other temporary employees] employees work at your location?

    Average   10.7

    Median   0

4. Over the last three years, has your company grown, declined or stayed about the same, in terms of employment at your current location?

    54%   Stayed the same

    36%   Grown

Processing header

7%   Declined

3%   Don't know

5. What industry or industries best describe the work your firm is engaged in? [DO NOT READ, ALLOW MULTIPLE RESPONSES].

16%   Financial, Banking, Insurance, or Real Estate

15%   Healthcare

14%   Building or Construction

11%   Restaurant

8%   Biotechnology & Biomedical Devices

7%   Architecture, Design, or Engineering

6%   Professional and Business Support Services

6%   Technology or Information & Communication Technologies

5%   Hotels

5%   Non-Profit

4%   Recreation

3%   Education

2%   Energy

1%   Employment Services

8%   Other

2%   Don't know/ Refused

SECTION 2 – General Hiring Profile

Next, I would like to ask you about your general talent and hiring needs at [FIRM NAME].

6. Thinking of the applicants for open positions over the last 12 months, please indicate your level of difficulty finding qualified **entry-level** applicants to fill these positions.

23%   Not at all difficult

43%   Somewhat difficult

28%   Very difficult

5%   Don't know

7. Thinking of the applicants for open positions over the last 12 months, please indicate your level of difficulty finding qualified **non-entry-level** applicants to fill these positions.

18%   Not at all difficult

34%   Somewhat difficult

31%   Very difficult

18%   Don't know

8. When a non-entry-level position becomes available in your firm, do you more often promote from within, hire from outside the company, or is it an even split between the two?

44%   Even split (50/50 promote & outside)

29%   Promote from within

23%   Recruit from outside

4%   Don't know

9. How often does your business recruit individuals from outside of greater Santa Barbara City (IF NEEDED: THIS IS THE AREA FROM GOLETA TO CARPINTERIA)?

20%   Never

27%   Rarely (1% to 24% of the time)

19%   Sometimes (25% to 49% of the time)

18%   Frequently (50% to 74% of the time)

10%   Always or Almost Always (75% to 100% of the time)

6%   Don't know

10. Are there any occupations or specific skills that you are having difficulty finding qualified applicants for, if yes could you identify those occupations and/or skills?

11.1%   Other Professional Service

10.7%   Sales/ Marketing

8.1%   Cooks/ Food preparation

5.9%   Office/Administration

5.2%   Housekeeping

4.4%   Craftsman/trade

3.6%   IT/ Tech

2.4%   Manufacturing

1.2%   Nurse/ healthcare

0.9%   Homecare aid

46.6%   Other

SECTION 3 – Entry and Middle Wage/Skill Hiring Profile

Now, I would like to ask you specifically about those positions at [FIRM NAME] that typically require less than a 4-year degree

11. Please indicate if your firm employs any of the following occupations at your current location.
[ALLOW MULTIPLE RESPONSES, **SET TOP THREE BASED ON PRIORITY CODES BELOW**]

Healthcare (IC=1) (n=30)

47%   Licensed practical and/or vocational nurse (LPN or LVN)

30%   Medical assistant

27%   Nursing assistant

27%   Medical secretary

10%   Dental assistant

3%   Restorative nurse assistant

27%   Don't know

Building & Design (IC=2) (n=32)

34%   Electrician

28%   CAD (Computer Assisted Designing)

25%   Plumbing

41%   Don't know/Refused

Financial, Banking, Insurance, or Real Estate (IC=3) (n=25)

48%   Customer service representatives

36%   Counter and office clerks

32%   Bookkeeping, accounting, and auditing clerk

24%   Insurance sales agents

12%   Property managers

16%   Don't know/ Refused

Technology or Information & Communication Technologies (IC=4) (n=10)

90%   Computer programmer or developer

70%   Customer service specialist

60%   Computer user support specialist

50%   Bookkeeping, accounting, and auditing clerk

20%   Telecommunications equipment installers and repairers

0%   Don't know/Refused

Biotechnology and Biomedical Devices (IC=5) (n=1)

100%   Office clerks

0%   Customer service representatives

0%   Medical appliance technicians

0%   Sales representatives

0%   Dental laboratory technicians

0%   Don't know/ Refused

Restaurants or Hotels (IC=6) (n=26)

46%   Chefs and head cooks

42%   Food service managers

42%   Bookkeeping, accounting, and auditing clerk

23%   Lodging managers

27%   Sales representatives

23%   Don't know/Refused

Professional & Business Support Services (IC=7) (n=11)

64%   Secretary and administrative assistant

36%   Bookkeeping, accounting, and auditing clerk

36%   Office clerks

27%   Computer user support specialist

18%   Sales representatives

18%   Computer programmer or developer

18%   Don't know/ Refused

12. Are there any other occupations or positions that we have not asked about, that are important at your firm, that generally require less than a 4-year college degree, if yes, can you please identify them?

56%   No

40%   Yes

4%   Don't know

13. Continuing to think about the occupations and positions we just discussed, please select the minimum education required for these roles

46%   High school diploma

18%   No minimum educate requirements

15%   Professional certificate or certification

12%   Associate degree

9%   Other

[IF Q6 = 1 OR 2, OR Q7 = 1 OR 2, ASK Q14 AND Q15, OTHERWISE SKIP]

14. Given the occupations that we have discussed, which of these positions are the most difficult positions to fill at your location? [PIPE IN ONLY RESPONSES SELECTED IN Q11 & Q12, allow up to three responses – REREAD OCCUPATIONS OF INTEREST AS NECCESARY]

39%   Medical secretary

16%   Nursing assistant

16%   None of the positions are difficult to hire for

12%   Licensed practical and/or vocational nurse (LPN or LVN)

11%   Secretary and administrative assistant

7%   Insurance sales agents

6%   Dental assistant

6%   Chefs and head cooks

6%   All positions

5%   CAD (Computer Assisted Designing)

5%	Bookkeeping, accounting, and auditing clerk
4%	Electrician
4%	Plumbing
4%	Computer programmer or developer
4%	Food service workers
3%	Restorative nurse assistant
3%	Counter and office clerks
3%	Food service managers
2%	Medical assistant
2%	Property managers
2%	Customer service representatives
2%	Computer user support specialist
2%	Office clerks
2%	Bookkeeping, accounting, and auditing clerk
2%	Computer user support specialist
2%	Personal bankers/tellers
1%	Customer service specialist
1%	Sales representatives
1%	Medical billing
0%	Telecommunications equipment installers and repairers
0%	Dental laboratory technicians
0%	Sales representatives
0%	Medical appliance technicians
0%	Lodging managers
0%	Sales representatives
0%	Computer programmer or developer
30%	Other

15. What are the two most significant reasons for the reported hiring difficulty? [DO NOT READ, ALLOW UP TO TWO RESPONSES]

41%   Small applicant pool

31%   Lack of experience/industry-specific knowledge

17%   Lack of technical skills/expertise

13%   Insufficient non-technical skills (problem-solving, critical thinking, communication, teamwork, adaptability, etc.)

8%   Insufficient certifications

4%   Insufficient educational attainment

21%   Other

1%   Don't know/ Refused

Again, thinking specifically about the occupations and positions at your firm that require less than a 4-year college degree:

16. How **important** is each of the following for these employees (Very important, Somewhat Important, Not too important, DK/NA [DON'T READ]):

Very important	Somewhat important	Not important	Don't Know/ Not Applicable	
83%	10%	2%	5%	Social and verbal communication skills
77%	16%	2%	5%	Problem-solving and critical thinking skills
44%	30%	21%	5%	Industry-specific knowledge
44%	35%	16%	5%	Technical skills
17%	42%	35%	6%	Educational degrees and certifications

17. How **difficult** is it to find qualified applicants with each of the following (Very difficult, Somewhat difficult, Not at all difficult, DK/NA [DON'T READ]):

Very difficult	Somewhat difficult	Not at all difficult	Don't Know/ Not Applicable	
25%	46%	21%	8%	Social and verbal communication skills
33%	44%	14%	9%	Problem-solving and critical thinking skill
33%	40%	15%	12%	Industry-specific knowledge
24%	44%	21%	11%	Technical skills
15%	36%	32%	17%	Educational degrees and certifications

18. Please list the top three skills that new-hires frequently lack or are deficient in?

21.6%   Work ethic (including timeliness, motivation, etc.)

16.2%   Experience/ industry knowledge

12.8%   Communication

8.8%   Social skills

7.9%   Problem solving/critical thinking

6.7%   Specific skill

6.1%   General technical skills

5.2%   Customer service

3.7%   Math/ computer ability

3.0%   Specific license

2.7%   Ability to speak English

5.2%   Other

SECTION 4 – Training & Interest Assessment

19. How satisfied are you with the with the educational institutions in and around the City of Santa Barbara and their ability to provide qualified workers for your firm?

38%   Very Satisfied

32%   Somewhat satisfied

11%   Somewhat dissatisfied

6%   Very dissatisfied

13%   Don't know

20. Now, we're going to present a list of skills and abilities that may or may not be needed for at least some of your organization's employees.

Here's the (first/next) one _____ (READ ITEM): Please tell me whether your organization has a great need, some need, or little to no need for the following skills and abilities.

Great need	Some need	Little to no need	Don't know/ Not Applicable	
24%	30%	45%	1%	have strong spreadsheet skills
15%	33%	50%	1%	can use social media effectively to communicate with current or potential customers
12%	18%	68%	2%	can create effective PowerPoint presentations
10%	18%	70%	2%	understand and can use QuickBooks

21. Are there specific training programs, educational degrees or certificate programs that do a good job of preparing people to work for your firm, if yes, could you identify the occupation and the program/institution?

40%   Yes (please specify)

39%   No

21%   Don't know

22. Are there new training programs or certificates that you would you like to see developed in the region that would help prepare students for your firm's skill requirements and hiring needs?

54%   No

32%   Yes

14%   Don't know

23. Lastly, I want to ask you about some potential training, educational and certificate programs and services that would be used to prepare students for work in your industry?

As I read each of the following programs, please tell me whether your firm would have no interest, some interest, or great interest in these opportunities.

Very interested	Somewhat interested	Not interested	Don't Know/ Not Applicable	
21%	31%	46%	2%	Develop an apprenticeship-type program for your future employees
13%	30%	52%	5%	Sourcing and pre-screening for interns
16%	20%	59%	5%	Courses that teach entry-level computer programming or coding
13%	21%	60%	6%	Courses that teach non-profit management & administration

Before we finish, I'd like to ask you a general question and verify your contact information.

24. May the research follow-up with you if needed?

76%   Yes

21%   No

2%   Don't know

Thank you for completing the survey. Since it sometimes becomes necessary for the project manager to call back and confirm responses to certain questions, I would like to verify your contact information.

A.   Known or unknown survey respondent

B.   Online or phone respondent

C.   If Known Industry Segment:

  a.   Healthcare
  b.   Building or Construction
  c.   Architecture, Design or Engineering
  d.   Non-profit organization or Community-Based Organization
  e.   Technology or Information Technology
  f.   Restaurant, Bars and Hotels
  g.   Employment Services, Business support services, Professional services

     h.   General

Thank you for completing the survey. Since it sometimes becomes necessary for the project manager to call back and confirm responses to certain questions, I would like to verify your contact information.

   D.   First and Last Name of Respondent _____

   E.   Position of Respondent _____

   F.   Phone of Respondent _____

   G.   Email of Respondent _____

   H.   Name of Company _____

   I.   Company Address (including City) _____

<p align="center">Those are all the questions I have.
Thank you very much for your time.</p>

   J.   Date of Interview _____
   K.   Time of Interview _____

   L.   Name of Interviewer _____

   M.   County _____

APPENDIX C: METHODOLOGY

Data compiled in this report were provided by secondary data and primary data through an employer survey.

SECONDARY DATA

Complete employment, population, workforce, and educational attainment statistics datasets for Santa Barbara City College region were defined by zip codes.

For this study, the industry clusters were defined using the North American Industry Classification System (NAICS) codes. Complete employment data were compiled from EMSI 2019 q.1 QCEW and Non-QCEW dataset for the Santa Barbara City College region defined by zip codes. Complete employment datasets were also drawn directly from the Economic Development Department (EDD) and Bureau of Labor Statistics (BLS).

Population statistics were compiled from the Census Bureau's American Community Survey (ACS) 2017 5-year estimates for the zip codes in Santa Barbara City College.

PRIMARY DATA

Survey Design
BW Research worked with the Santa Barbara City College to develop a survey instrument to meet all research objectives of this study. In developing the survey instrument, BW Research utilized techniques to overcome known biases in survey research and minimize potential sources of measurement error. BW Research programmed the web survey in house.

Sampling Method
BW Research used online panels based on age and verified through residential zip code to serve as the primary sampling databases.

Data Collection
Prior to data collection, BW Research pre-tested the survey instrument to ensure that all words and questions were easily understood by respondents. The data collection period was between November 8 and December 4, 2018.