A Look at Our Local Community: Conducting an (brief) External Scan

PaRC Presentation
February 6, 2013
Overview

• Examination of external environment
  – Population
  – Education
  – Labor

• Consider our local community in relation to who we are and might be serving

• Inform strategic planning
Population

Who makes up our local community?
Within our service area, population projected to increase between 3%-7% between 2010-2060.

Projected 23% increase in Santa Clara County over next 47 years.

29% increase for San Mateo County

Source: CA Department of Finance, P-1 (Age)

Note: Foothill service area defined as Los Altos, Los Altos Hills, Mountain View, Palo Alto, Sunnyvale.
Projections by Age

Santa Clara Population Projections 2010-2060
by Age 15 and older

65+ will be largest proportion of county population after 2040

Accompanying decrease among those 45-64

Source: CA Department of Finance, P-2 (Age)
Projections by Age

Santa Clara County Population Projections 2010-2060 by Age Group as a Percent Change

- Greatest rate of change among 85+
- Largest increase among 75-84
- Among 18-24, increase by almost 20%

Source: CA Department of Finance, P-1 (Age)
Projections by Ethnicity

Santa Clara County Population Projections 2010-2060 by Ethnicity

- Decline in White population
- Asian and Hispanic populations make up majority of county population (70%) by 2060

Source: CA Department of Finance, P-2 (Age)
Over next 10 years, gender breakdown remain fairly constant at 50/50

Percentage increase between 2012-2022 by about 10% for men and women

Source: EMSI
Income

Foothill College Service Area
2011 Median Household Income

- Los Altos Hills: $218,077
- Los Altos: $151,856
- Palo Alto: $122,532
- Sunnyvale: $93,292
- Mountain View: $91,446

Santa Clara County median: $89,064

Source: US Census Fact Finder, 2011
Income by Ethnicity

Santa Clara County
2011 Median Household Income by Ethnicity

Source: US Census Fact Finder
Over one-third of people living in Mountain View and Sunnyvale who speak a language other than English at home also feel they don’t speak English very well.
Education

Attainment, Preparation, Attendance
Educational Level by County

Highest Level of Education among Adults Aged 25+

- **Associate Degree**
  - Santa Clara County: 40%
  - San Mateo County: 30%
  - California: 29%
- **Some college, no degree**
  - Santa Clara County: 17%
  - San Mateo County: 19%
  - California: 22%
- **Associate's degree**
  - Santa Clara County: 7%
  - San Mateo County: 8%
  - California: 8%
- **Bachelor's degree**
  - Santa Clara County: 26%
  - San Mateo County: 27%
  - California: 19%
- **Graduate or Professional degree**
  - Santa Clara County: 17%
  - San Mateo County: 20%
  - California: 11%

Both counties have highly educated residents (BA/BS+)

Source: US Census Fact Finder, 2011
High School Graduation Projections

Santa Clara and San Mateo Counties HS graduations projected to increase at similar rate (13%)

Source: CA Department of Education
Feeder high schools complete UC/CSU requirements at a higher rate compared to county and state.

Santa Clara 36%
Sequoia HS 50%

Source: CA Department of Education
Local Community Colleges

Regional institutions all experienced declines in enrollment and FTES

Evergreen experienced the largest decline among these colleges in enrollment between 2009-10 to 2010-11 (-16%)
Labor

Employers, Employment, Projections
## Top Employers

<table>
<thead>
<tr>
<th>Rank</th>
<th>Santa Clara County</th>
<th>San Mateo County</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Business</td>
<td>Local Employee</td>
</tr>
<tr>
<td>1</td>
<td>Stanford Hospital &amp; Clinics</td>
<td>4,935</td>
</tr>
<tr>
<td>2</td>
<td>Santa Clara Valley Medical Center</td>
<td>4,513</td>
</tr>
<tr>
<td>3</td>
<td>Brocade Communications Systems, Inc.</td>
<td>2,500</td>
</tr>
<tr>
<td>4</td>
<td>Cypress Semiconductor Corporation</td>
<td>2,076</td>
</tr>
<tr>
<td>5</td>
<td>Varian Medical Systems Inc</td>
<td>2,068</td>
</tr>
</tbody>
</table>

**Santa Clara County**
- Health Care, Technology

**San Mateo County**
- Government, Technology and Information, Financial

Source: EMSI, Equifax Business List Data (2012, Q3)
Companies that have recently had a credit check.
Employment by Sector

Almost half of those employed in the county are employed in the service sector.

Service sector includes professional, scientific and technical services; educational services; arts and entertainment; accommodation and food services; health care and social assistance.

Source: EMSI
Unemployment Rate

Unemployment rate appears to be on a declining trend.

Both counties demonstrate unemployment trends lines that are lower compared to state levels.

Source: BLS Local Area Unemployment Statistics
### Fastest Growing Occupations for Santa Clara County 2012-2017

<table>
<thead>
<tr>
<th>Description</th>
<th>2012 Jobs</th>
<th>2017 Jobs</th>
<th>5 Yr. % Change</th>
<th>Education Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio, Cellular, and Tower Equipment Installers and Repairs</td>
<td>45</td>
<td>73</td>
<td>62%</td>
<td>Associate's degree</td>
</tr>
<tr>
<td>Film and Video Editors</td>
<td>105</td>
<td>141</td>
<td>34%</td>
<td>Bachelor's degree</td>
</tr>
<tr>
<td>Personal Care Aides</td>
<td>4,872</td>
<td>6,346</td>
<td>30%</td>
<td>Short-term on-the-job training</td>
</tr>
<tr>
<td>Reporters and Correspondents</td>
<td>270</td>
<td>347</td>
<td>29%</td>
<td>Bachelor's degree</td>
</tr>
<tr>
<td>Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic</td>
<td>123</td>
<td>157</td>
<td>28%</td>
<td>Moderate-term on-the-job training</td>
</tr>
<tr>
<td>Medical Equipment Repairers</td>
<td>281</td>
<td>357</td>
<td>27%</td>
<td>Associate's degree</td>
</tr>
<tr>
<td>Curators</td>
<td>53</td>
<td>66</td>
<td>25%</td>
<td>Master's degree</td>
</tr>
<tr>
<td>Home Health Aides</td>
<td>4,100</td>
<td>5,074</td>
<td>24%</td>
<td>Short-term on-the-job training</td>
</tr>
<tr>
<td>Helpers--Carpenters</td>
<td>161</td>
<td>198</td>
<td>23%</td>
<td>Short-term on-the-job training</td>
</tr>
<tr>
<td>Archivists</td>
<td>130</td>
<td>158</td>
<td>22%</td>
<td>Master's degree</td>
</tr>
</tbody>
</table>

Roughly half of the fastest growing occupations require some training or an Associate’s degree.
## 5-Yr Projected Occupation Growth

### Fastest Growing Occupations for San Mateo County 2012-2017

<table>
<thead>
<tr>
<th>Description</th>
<th>2012 Jobs</th>
<th>2017 Jobs</th>
<th>5 Yr. % Change</th>
<th>Education Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chemical Equipment Operators and Tenders</td>
<td>72</td>
<td>125</td>
<td>74%</td>
<td>Moderate-term on-the-job training</td>
</tr>
<tr>
<td>Credit Authorizers, Checkers, and Clerks</td>
<td>50</td>
<td>75</td>
<td>50%</td>
<td>Short-term on-the-job training</td>
</tr>
<tr>
<td>Agents and Business Managers of Artists, Performers, and Athletes</td>
<td>48</td>
<td>72</td>
<td>50%</td>
<td>Bachelor's or higher degree, plus work experience</td>
</tr>
<tr>
<td>Helpers--Carpenters</td>
<td>59</td>
<td>87</td>
<td>47%</td>
<td>Short-term on-the-job training</td>
</tr>
<tr>
<td>Tile and Marble Setters</td>
<td>167</td>
<td>242</td>
<td>45%</td>
<td>Long-term on-the-job training</td>
</tr>
<tr>
<td>Mechanical Door Repairers</td>
<td>66</td>
<td>93</td>
<td>41%</td>
<td>Moderate-term on-the-job training</td>
</tr>
<tr>
<td>Structural Metal Fabricators and Fitters</td>
<td>54</td>
<td>75</td>
<td>39%</td>
<td>Moderate-term on-the-job training</td>
</tr>
<tr>
<td>Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders</td>
<td>75</td>
<td>104</td>
<td>39%</td>
<td>Moderate-term on-the-job training</td>
</tr>
<tr>
<td>Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders</td>
<td>47</td>
<td>65</td>
<td>38%</td>
<td>Moderate-term on-the-job training</td>
</tr>
<tr>
<td>Environmental Engineering Technicians</td>
<td>16</td>
<td>21</td>
<td>31%</td>
<td>Associate's degree</td>
</tr>
</tbody>
</table>

Source: EMSI

Almost all of the fastest growing occupations require training.
High demand means there is a projected gap between the number of people with the education and skills who qualify for anticipated job openings.

### 10 High Demand Occupations for Santa Clara and San Mateo Counties 2012-2022

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Education Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>First-Line Supervisors of Office and Administrative Support Workers</td>
<td>Work experience in a related occupation</td>
</tr>
<tr>
<td>Market Research Analysts and Marketing Specialists</td>
<td>Bachelor's degree</td>
</tr>
<tr>
<td>Computer Systems Analysts</td>
<td>Bachelor's degree</td>
</tr>
<tr>
<td>General and Operations Managers</td>
<td>Bachelor's or higher degree, plus work experience</td>
</tr>
<tr>
<td>Landscaping and Groundskeeping Workers</td>
<td>Short-term on-the-job training</td>
</tr>
<tr>
<td>Carpenters</td>
<td>Long-term on-the-job training</td>
</tr>
<tr>
<td>First-Line Supervisors of Food Preparation and Serving Workers</td>
<td>Work experience in a related occupation</td>
</tr>
<tr>
<td>Teacher Assistants</td>
<td>Short-term on-the-job training</td>
</tr>
<tr>
<td>Maintenance and Repair Workers, General</td>
<td>Moderate-term on-the-job training</td>
</tr>
<tr>
<td>Inspectors, Testers, Sorters, Samplers, and Weighers</td>
<td>Moderate-term on-the-job training</td>
</tr>
</tbody>
</table>

Source: EMSI
## Projected Program Demand

### Top 10 Foothill Program Demand based on Projected Job Growth 2011-2022

**In Santa Clara and San Mateo Counties**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Program</th>
<th>Regional Openings</th>
<th>Institution Completions</th>
<th>Regional Completions</th>
<th>Jobs Growth (2011-2022)</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Computer Science</td>
<td>6,095</td>
<td>7</td>
<td>569</td>
<td>29%</td>
<td>5,526</td>
</tr>
<tr>
<td>2</td>
<td>Computer Programming/Programmer, General</td>
<td>5,125</td>
<td>9</td>
<td>43</td>
<td>30%</td>
<td>5,082</td>
</tr>
<tr>
<td>3</td>
<td>Computer and Information Sciences, General</td>
<td>3,077</td>
<td>5</td>
<td>13</td>
<td>27%</td>
<td>3,064</td>
</tr>
<tr>
<td>4</td>
<td>Computer Systems Networking and Telecommunications</td>
<td>2,356</td>
<td>8</td>
<td>23</td>
<td>30%</td>
<td>2,333</td>
</tr>
<tr>
<td>5</td>
<td>International Business/Trade/Commerce</td>
<td>1,228</td>
<td>4</td>
<td>4</td>
<td>6%</td>
<td>1,224</td>
</tr>
<tr>
<td>6</td>
<td>Administrative Assistant and Secretarial Science, General</td>
<td>1,162</td>
<td>1</td>
<td>50</td>
<td>12%</td>
<td>1,112</td>
</tr>
<tr>
<td>7</td>
<td>Accounting Technology/Technician and Bookkeeping</td>
<td>1,241</td>
<td>37</td>
<td>299</td>
<td>17%</td>
<td>942</td>
</tr>
<tr>
<td>8</td>
<td>Electrician</td>
<td>909</td>
<td>3</td>
<td>147</td>
<td>19%</td>
<td>762</td>
</tr>
<tr>
<td>9</td>
<td>Mass Communication/Media Studies</td>
<td>460</td>
<td>2</td>
<td>25</td>
<td>30%</td>
<td>435</td>
</tr>
<tr>
<td>10</td>
<td>Health and Physical Education/Fitness, General</td>
<td>531</td>
<td>6</td>
<td>166</td>
<td>28%</td>
<td>365</td>
</tr>
</tbody>
</table>

**Total**  
22,184  
82  
1,339

These are programs currently offered at Foothill.

Largest number of openings based on 2011 completion rates are primarily in computer industries.

But also occupations related to communication and health and fitness programs such as editors, reporters, authors, coaches, scouts, fitness trainers.

Source: EMSI
Summary

• Population
  – Continued increase over next 45 years
  – Increase in college-age population group

• Education
  – Highly educated population

• Labor
  – Decrease in unemployment
  – Projections suggest need for training
  – Computer technology/information opportunities continue to increase
Next Steps

• Use with Foothill student data
• Encourage discussion about who we are serving and who we might serve
• Serve as resource for mission revisit and for educational strategic master plan (ESMP)

• Questions?
• Feedback?