ALLAN HANCOCK COMMUNITY COLLEGE

Northern Santa Barbara Economic and Workforce Analysis for Adult Education

October 2020

[bw] RESEARCH PARTNERSHIP

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Executive Summary

Introduction

Allan Hancock College and the Northern Santa Barbara County Adult Education Consortium (NSBCAEC) engaged BW Research to develop a comprehensive profile of the regional workforce and economy. This research examines the regional economy before and during the COVID-19 Pandemic, regional population demographics, current and potential student perceptions and challenges, regional employer experiences and expectations, and career pathways.
This research seeks to achieve several objectives:

- Develop a profile of the Northern Santa Barbara region's underlying population and employment dynamics to better understand their preparedness for the employment in the region, and how educational institutions can best prepare for them. The COVID-19 Pandemic has added importance to this work, as many of the populations that have been hit the hardest are those that were already disadvantaged or in greatest need.

- Analyze survey responses from regional employers and secondary data sources to 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 students to achieve gainful employment in the region.

- Examine survey data from current and potential students, and highlight key supply-side factors, including perceptions, challenges, and areas of interest to better understand the region's opportunities. This data may also be leveraged to increase accessibility and outreach to potential students and current students struggling under current circumstances.

The Research Team

BW Research Partnership is a full-service applied economic research firm with deep experience measuring the scale and changes of regional economies and exploring the evolving world of work. BW Research is a national leader in economic and workforce research, and the firm has developed an extensive protocol for analyzing local, statewide, and national ecosystems and conducting research that engages with relevant stakeholders to provide our clients with robust and reliable data-driven findings. BW Research has offices in Carlsbad, CA, and Wrentham, MA.

Throughout this project, Paul Murphy and his team from Allan Hancock College and the Northern Santa Barbara County Adult Education Consortium (NSBCAEC) were instrumental in providing regional input and expertise that guided the research and ensured key questions and regional challenges were addressed.

Acknowledgments

This research was made possible through efforts and funding provided by Allan Hancock College and the Northern Santa Barbara County Adult Education Consortium (NSBCAEC) and California Community Colleges Strong Workforce Program. The research team would also like to thank Paul Murphy and the Office of Institutional Effectiveness staff, including Janet McGee, Armando Cortez, Erica Biely, and Steven Butler.

Key Research Findings

This section highlights the research's key findings and includes important metrics that drive and support the insights.

What We Learned About Employers and the Economy

- **The NSB region has fared the COVID-19 Pandemic better than the overall state, though certain industries have borne the brunt of the Pandemic's negative impacts.**
    - The NSB regional unemployment rate has recovered faster and is lower than the statewide average. As of June 2020, the NSB regional unemployment rate was nearly three percentage points lower than the state (12.4% vs. 15.1%).
    - Industries with the lowest average earnings per job have been among the hardest hit. Tourism, Hospitality, and Recreation—the industry cluster with the lowest average earnings—declined by 61% between February and June of 2020. Other low-paying industries like Other Services (such as nail salons, barbershops, and dry cleaners) and Retail saw employment declines of 23% and 13%, respectively, during this time.

- **Most employers have experienced some negative impacts from COVID-19, but few report substantial negative or permanent effects, as of July 2020.**
    - 64% of employers stated that COVID-19 has had some negative impacts on their business, and another 21% said they had been forced to shut down their business but have since been able to reopen. Only 7% stated that they have not reopened their business.
    - 22% of employers reported that their business had already fully recovered, and another third (34%) expected to recover within the next few months as people leave their homes and return to work.
    - We still do not know how quick and robust the recovery will be. A slow and incomplete recovery will have vastly different effects on the region than a relatively quick and complete recovery.

- **Employers typically look for talent locally but often struggle to find qualified talent with all of the skills and abilities desired.**
    - Three-quarters (75%) of employers recruit individuals from outside the NSB region less than half of the time, and nearly half (44%) reported recruiting outside of the region less than a quarter of the time.
    - Half (51%) of employers report finding qualified entry-level talent is 'somewhat difficult,' and another 23% report it is 'very difficult.' It should be noted that this is
    - Non-technical skills are of great importance to employers. 'Social and verbal communication skills' and 'problem-solving and critical thinking skills' are ranked the two-most important skills for positions requiring less than a four-year degree. Furthermore, when asked which skills their organization needs the most, employers most often selected 'ability to work effectively on a team' and 'self-motivation and ability to work independently.'
    - Just over half (53%) of employers are at least 'somewhat satisfied' with regional education and training institutions. Three-in-ten (30%) reported at least some dissatisfaction.

What We Learned About Current and Potential Students

- **The COVID-19 Pandemic has made education more appealing for many but has also raised some of its barriers.**
    - About 1 in 6 (16%) current and potential students reported that the Pandemic made them 'much more likely' to continue their education, and another quarter (24%) reported they are 'somewhat more likely' to continue their education. Only 14% of respondents reported that the Pandemic made them less likely to continue their education.
    - About two out of five (41%) of current and potential students reported that paying tuition or fees for desired education or training was a 'considerable challenge.' Another 27% of respondents reported that this was 'somewhat a challenge.'
    - Nearly two-thirds (62%) of current and potential students reported that finding programs and courses that work within their schedule was at least 'somewhat a challenge.'
    - 42% of current and potential students stated that accessing an online curriculum is at least 'somewhat a challenge.' 51% of respondents also reported that determining the value of online education was at least 'somewhat a challenge.'
    - 72% of current and potential students reported at least some interest in a course that improves their ability to learn online.

- **Older Residents of the NSB region are the fastest-growing age cohort, which is expected to increase in the future.**

- Residents ages 55 and older were the fastest-growing age cohort in the NSB region.
- More than a third (36%) of the current population is under the age of 25.
- Another 15% of the population is 65 or older.
- By 2060, a quarter (25%) of Santa Barbara County's population is expected to be 65 or older.

- **Educational attainment in the NSB region varies considerably by area.**
  - More than half of the population 25 years or older in the North SBC sub-region have at most a high school diploma or equivalent as their highest level of education.
  - In contrast, residents from South SLO County sub-region, on average, have a higher level of educational attainment; one-third of all 25+ residents have a bachelor's degree or higher.

Recommendations for Supporting Current and Potential Students

1. **Financial support and schedule flexibility are more important now than ever for current and potential students.** Jobs such as waiting tables at restaurants, café baristas, and general office temp positions used to offer students a means of earning a stable income while attending classes. Many of these jobs have now disappeared or offer lowered and more inconsistent earnings. In fact, 41% of survey respondents stated that paying tuition or fees is a 'considerable challenge,' and another 27% stated it was 'somewhat a challenge.' Ensuring current and potential students are aware of and have access to the resources and support available to them will be crucial.

Recommendation #1: Continue financial and support services offered to students. Effectively communicating the availability and flexibility of these resources will be a key step in helping students continue their education.
Target AE Segments: Current and potential students, though particularly those in greatest need, more likely to be found in North SBC

Recommendation #2: Increase student resiliency and appeal in the labor market by promoting coursework that develops students' skills including problem solving, teamwork, verbal communication, and the ability to work individually.
Target AE Segments: All students
Geographic Area: Across the NSB Region

2. **Foster student resiliency by encouraging and promoting coursework and curriculum that develops key employability skills, including problem-solving, ability to work independently, verbal communication, and teamwork.** These skills were the most desired skills by employers in the NSB region. Coursework, projects, and exercises meant to develop and exhibit these skills can allow students to leverage these experiences with potential employers. Some of these skills--particularly verbal communication and the ability to work independently--have likely increased in importance in the era of COVID-19 as work is increasingly completed remotely and away from direct supervision.

3. **Address the concerns about online learning.** The shift to online or mostly online programs has been a tremendous disruption to academic and training institutions. Students are equally caught off-guard and unsure how to proceed. More than half (51%) of current and potential students reported it was 'at least somewhat a challenge' to determine the value of online learning, and 72% reported they would be interested in a course that improved their ability to learn online. Efforts to assuage and mitigate these concerns over online education, such as a brief webinar on how to succeed in online learning, could benefit students and regional education providers alike.

Recommendation #3: Provide current and potential students with resources for the transition to online education. Consider offering an 'online course primer' that gives students helpful tips and tricks to succeed in learning online.
Target AE Segments: All current and potential students
Geographic Area: Across the NSB Region

4. **Continue to engage and support minority populations.** The Coronavirus Pandemic has highlighted structural inequalities that result in greater hardships and stifled opportunities for minority populations. A recent report by Strada Education reveals that Latinx and Black Americans are more likely to have canceled education plans or delayed enrollment and more likely to have been laid off than their peers.[1] Within the NSB region, Hispanic or Latinx individuals are twice as likely as their peers to not have a high school diploma. Black or African American individuals and individuals who identified as 'Some Other Race' are 18% and 34% more likely to have a high school diploma at most. Allan Hancock College and the NSBCAEC should continue to ensure that students of all backgrounds are offered the opportunity and support for successful educational advancement.

Recommendation #4: Consider that additional resources, outreach, or reengagement efforts may be needed to assist these populations in continuing their education.
Target AE Segments: Latinx and Black students
Geographic Area: Across the NSB Region

Recommendations for Planning for the Future of Work and Education

5. **Continue to build and reinforce strong pathway programs in industry clusters that are growing in the NSB region.** This research identified four industry clusters that have demonstrated strong historical growth and relative resiliency in the face of the economic downturn driven by the COVID-19 Pandemic. These four industry clusters: 1) Healthcare, 2) Building and Design, 3) Finance, Insurance, Banking, and Real Estate (FIRE), and 4) Defense, Aerospace, and Transportation Manufacturing (DATM) all offer strong pathways for AHC and NSBCAEC students.

   There are a number of strong career pathways within these industries that align well with AHC programs. The healthcare and drafting programs available at AHC offer students strong entry points into successful careers with upward mobility. Regional manufacturing and design employers suggest there is strong interest in the specific skills of drafting and machining. If considering new programs, the employer survey revealed that IT programs that provide experience building web applications and IT security would likely be met with great interest.

Recommendation #5: Support and consider expanded marketing efforts for programs in Healthcare, Building and Design, FIRE, and DATM. In particular, the architectural drafting, engineering, machining, and healthcare programs ought to receive greater attention and amplification for students.
Target AE Segments: All students
Geographic Area: Across the NSB Region

6. **Consider expanding employer outreach efforts.** Three-in-ten (30%) employers are at least 'somewhat dissatisfied' with regional educational and training institutions, and only 11% reported they are 'very satisfied.' Familiarity may play a role in this: only 18% of employers reported working with regional education and training institutions. There is strong interest among employers for collaboration opportunities; 69% of respondents reporting at least 'some interest' in 'an apprentice-type program for [their] future employees.' Interest in pilot programs did not vary notably by business size (those with 10 or fewer employees compared to those with more than 10), though there are some differences in reasons for hiring difficulty and desired employee skills. Small businesses reported greater need for employees with the ability to work independently and think critically (Figure 31). This may be because small businesses cannot afford to have constant oversight of employees. Thus, programs that emphasize students' ability to work autonomously may have heightened interest among smaller businesses.

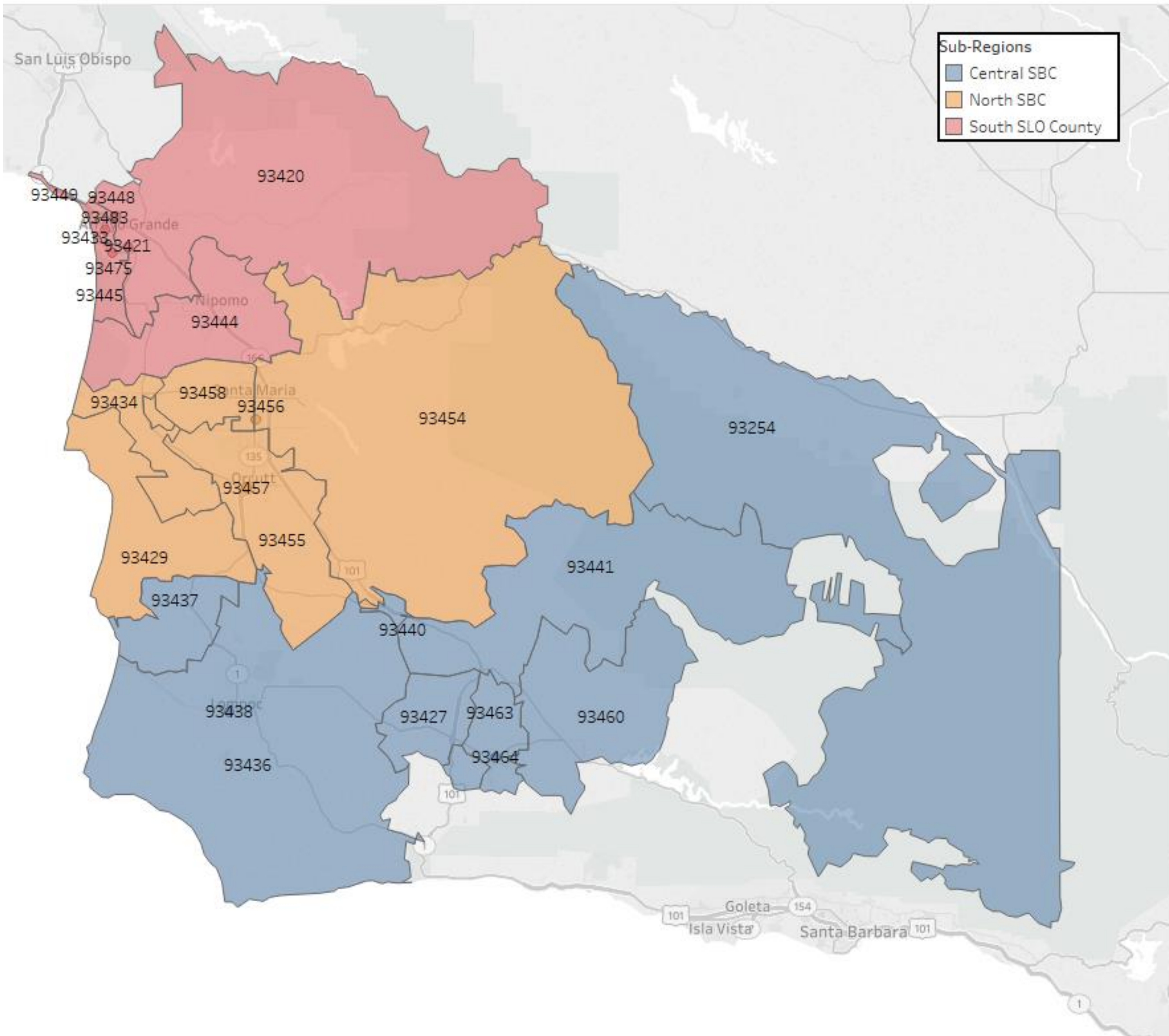
Recommendation #6: Increase outreach to regional employers. Our findings suggest that employers are interested in collaboration with regional educational institutions and this may help increase student internships and placements as well as the number of employers who are satisfied with the regional educational options available.
Target AE Segments: All students
Geographic Area: Across the NSB Region

[1] Strada Public Viewpoint. "Disparities in Disruption: COVID-19's Disproportionate Impact on Work and Education for People of Color". June 10, 2020. https://www.stradaeducation.org/wp-content/uploads/2020/06/Public-Viewpoint-Charts-Week-9.pdf

7. **Prepare for older students.** Current and forecasted regional demographics suggest that older adults will be a growing population of potential students in the NSB region. In fact, SBAG projects that by 2060, 25% of Santa Barbara County will be 65 years of age or older. There are already nearly 42,000 adults ages 45 and older in the NSB region who only have a high school diploma. Increasing curriculum and courses that are geared towards older audiences may be worth investigating.

Recommendation #7: Prepare for growing demand by considering additional offerings in courses for older adults, including arts and music.
Target AE Segments: Students 45 and older
Geographic Area: Across the NSB Region

The Northern Santa Barbara Study Region



CENTRAL SBC	NORTH SBC	SOUTH SLO COUNTY
93427, 93254, 93436, 93438, 93440, 93441, 93460, 93463, 93464, 93437	93429, 93434, 93454, 93455, 93456, 93457, 93458	93420, 93421, 93433, 93483, 93444, 93445, 93475, 93448, 93448
Cuyama, Buelton, Lompoc, Vandenberg, Los Alamos, Los Olivios, Santa Ynez, Solvang	Casmalia, Guadalupe, Rancho Suey, Santa Maria	Arroyo Grande, Grover Beach, Nipomo, Oceano, Pismo Beach

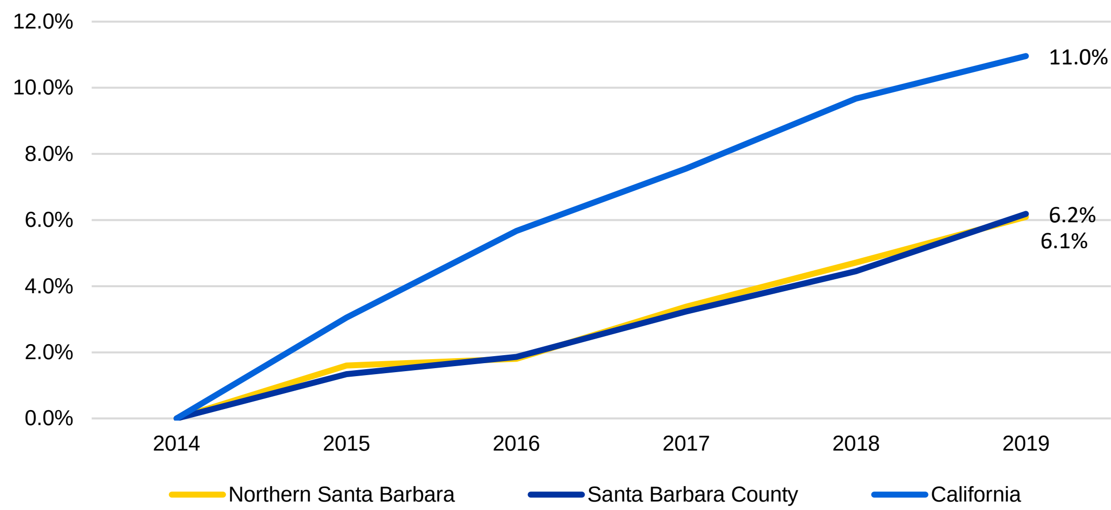
Regional Economic Profile

This section provides a general overview of the economy in the Northern Santa Barbara (NSB) region. It includes metrics indicative of overall economic health and opportunity as well as context for more detailed analysis. This section also includes a look into the COVID-19 crisis and its impact on regional unemployment. Later sections of this report focus on the impact of COVID-19 on specific industries within the NSB region.

Employment

Employment growth in the NSB region has tracked closely with broader Santa Barbara County trends. The NSB region has more than 120,600 jobs (pre-COVID-19), equivalent to more than half (56%) of all jobs in Santa Barbara County. Figure 1 shows that employment in both regions has grown at a little more than half the pace of the statewide average.

Figure 1. Growth in Employment (2014-2019)[2]



Unemployment

The Coronavirus pandemic has had substantial effects on unemployment in the NSB region, and the full impacts are yet to be seen. Unemployment increased from an annual average of 4.5% in 2019 to 12.4% in June of 2020. This rate is greater than the Santa Barbara County but lower than the state average unemployment rate. Unemployment in the South SLO County sub-region has seen the most dramatic increase between 2019 and the end of Q2 2020, reaching 12.7% in June (Table 1).

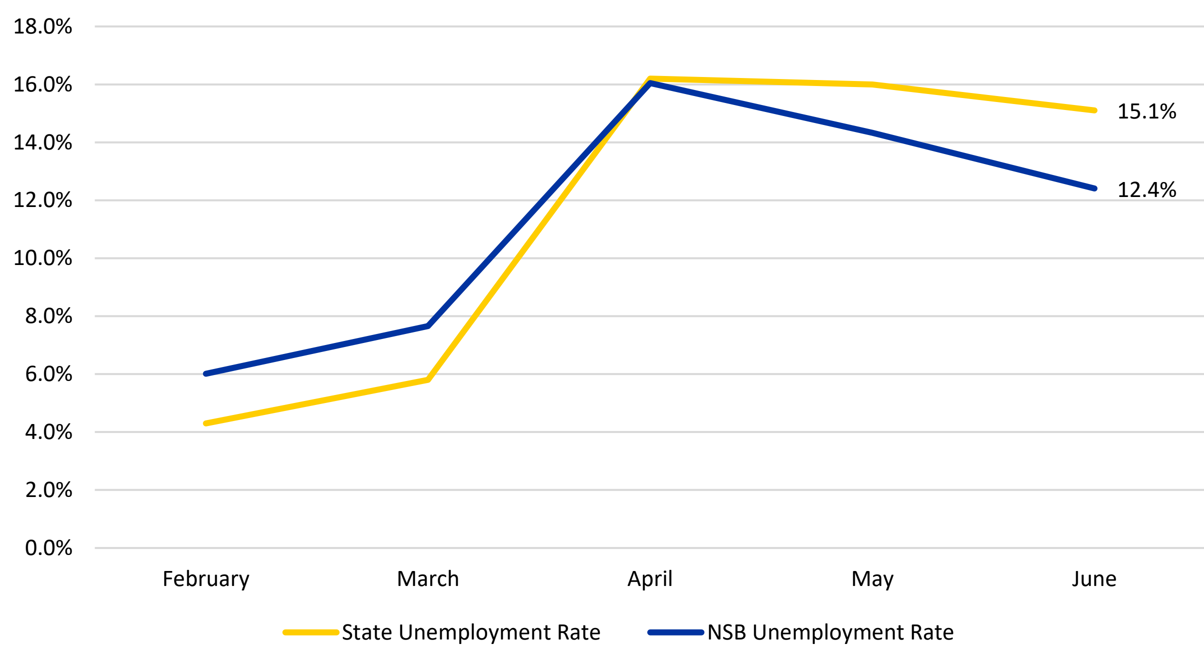
[2] EMSI 2020.2

Table 1. Unemployment Rates by Sub-Region[3] [4]

	2019 UNEMPLOYMENT (ANNUAL AVERAGE)	JUNE 2020 UNEMPLOYMENT
Central SBC	3.9%	12.2%
North SBC	5.4%	12.4%
South SLO County	3.0%	12.7%
Northern Santa Barbara Study Region	**4.5%**	**12.4%**
Santa Barbara County	**3.7%**	**11.6%**
California	**4.0%**	**15.1%**

While unemployment in the NSB region at the start of 2020 was higher than the statewide average, the region has seen a faster recovery than the broader state. As of June 2020, the unemployment rate in the NSB region was nearly three percentage points lower than the statewide figure (Figure 2).

Figure 2. Regional Unemployment Rates February – June 2020[5]



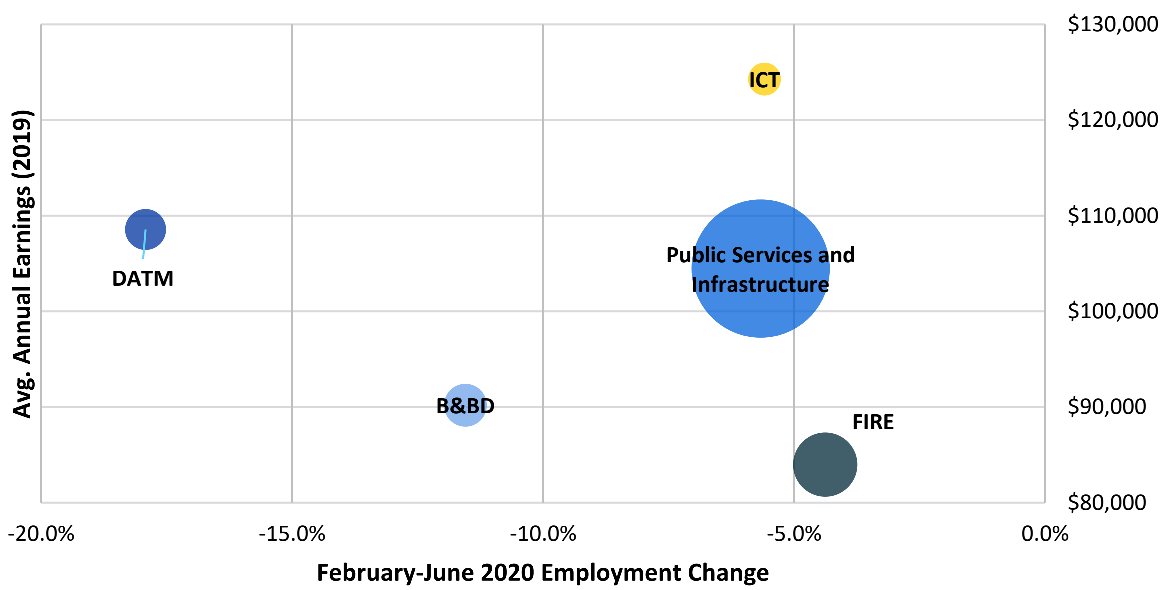
3 State of California Employment Development Department. Accessed May 11, 2020.
4 Sub-regional (city and sub-county) definitions can be found in Appendix B.
5 State of California Employment Development Department.

The Post-COVID-19 Economy

Between February and June of 2020, the Northern Santa Barbara region lost an estimated 12,000 jobs or about 10% of the workforce. The unemployment rate in the NSB region is estimated to be about 12.4% as of June 2020, down from a high of 16.0% in April. This unemployment rate is lower than that statewide (15.1%) average[6] but higher than the national unemployment rate (11.1%). The industry-specific North Santa Barbara Region estimates below were produced by BW Research using local, state, and national data to extrapolate industry-specific losses at the local level.

Job losses were not evenly distributed across the economy; in fact, the five-highest average earning industry clusters in Figure 3 shed about 1,300 jobs between February and June of 2020, representing a decline of less than 7%. Other industry clusters—particularly those with lower average earnings (see Figure 4 and Figure 5)—saw significantly higher employment losses.

Figure 3. February-June 2020 Change in Employment Among Highest-Earning Industry Clusters[7]

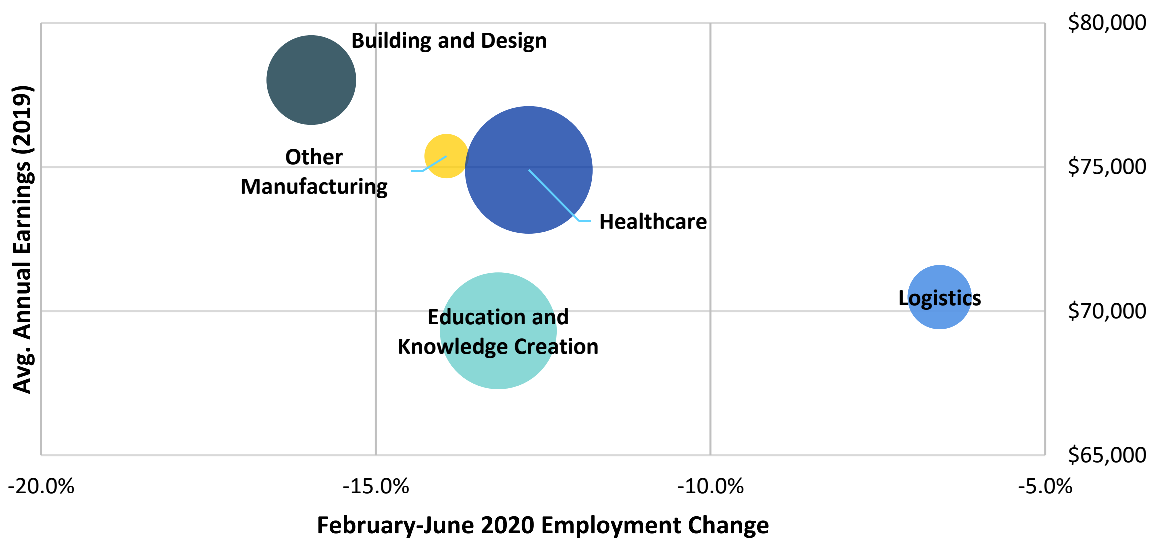


Four of the five mid-earning industry clusters saw employment declines of 10 percent or more over the five-month period of February through June. Logistics, which only saw relatively moderate employment losses, has been buoyed by the increased demand in online shopping. Employment losses in the Healthcare industry cluster may seem counterintuitive, though the mandated and voluntary suspension of elective surgeries has left some in the medical fields without work (Figure 4).

[6] California Employment Development Department.

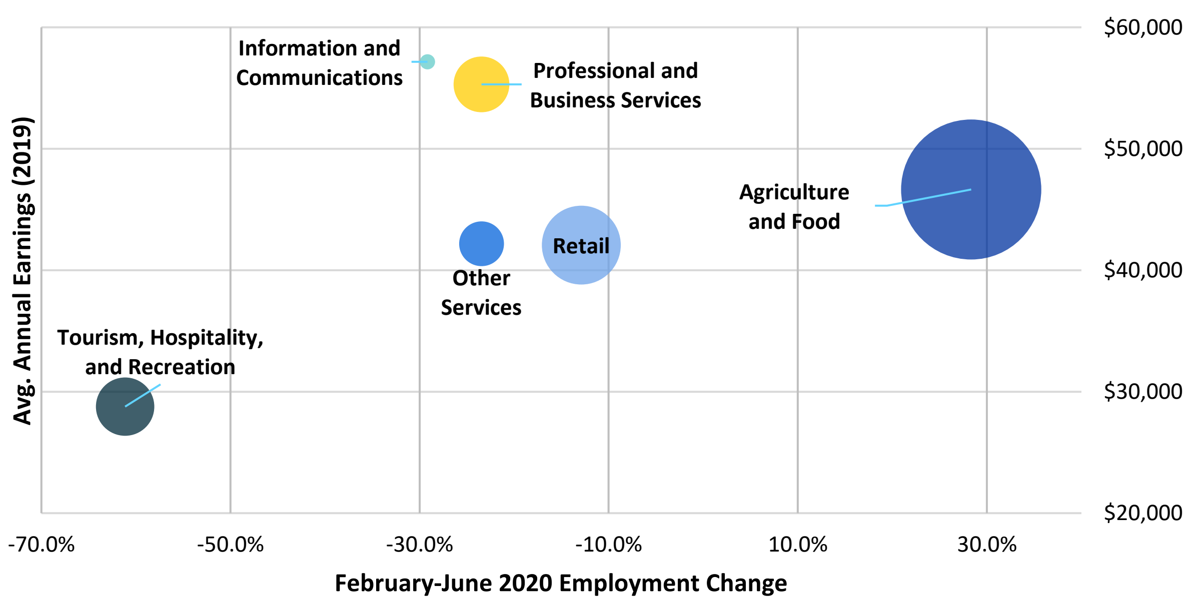
[7] These figures are based on BW Research's model applying regionally-specific data to national trends reported by the Bureau of Labor Statistics. These figures are representative of employment change from January 2020 to the end of April 2020.

Figure 4. February-June 2020 Change in Employment Among Mid-Earning Industry Clusters[8]



The five lowest-earning industry clusters were among the hardest hit in terms of job loss. Tourism, Hospitality, and Recreation has seen an estimated 61% decline in employment between February and June of 2020, resulting in about 9,000 jobs lost in the NSB region (Figure 5). These estimates are not seasonally-adjusted, meaning that the growth in Agriculture and Food employment is higher than a seasonally-adjusted figure would suggest.

Figure 5. February-June 2020 Change in Employment Among Lowest-Earning Industry Clusters[9]



[8] Ibid.

[9] Ibid.

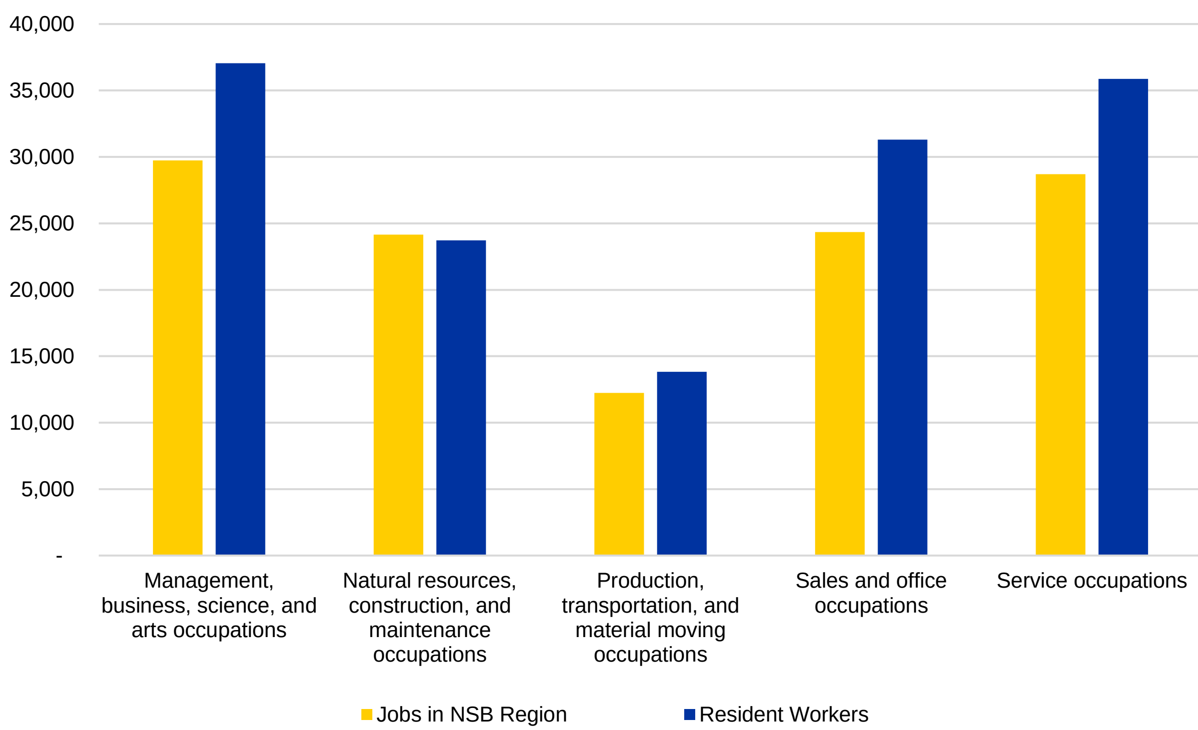
Regional Workforce Profile

This section highlights key characteristics of the NSB regional workforce. Understanding regional workforce characteristics provides insight into the types of workers in and around the NSB region. The data in this section reflect pre-COVID-19 data. The Novel Coronavirus Pandemic will have dramatic and lasting impacts on the economy and the world of work, both nationally and locally. Please see earlier sections of this report to better understand some of the economic impacts of COVID-19.

Workforce and Jobs in The Northern Santa Barbara Region

The NSB region is a net exporter of about 22,500 jobs. This means there are a net 22,500 more working residents in the NSB region than jobs in the region. More than 7,000 of these jobs are in higher-paying management, business, science, and arts occupations. Natural resources, construction, and maintenance are the only categories of occupations in which the NSB region is net-importers into the region for workers (Figure 6).

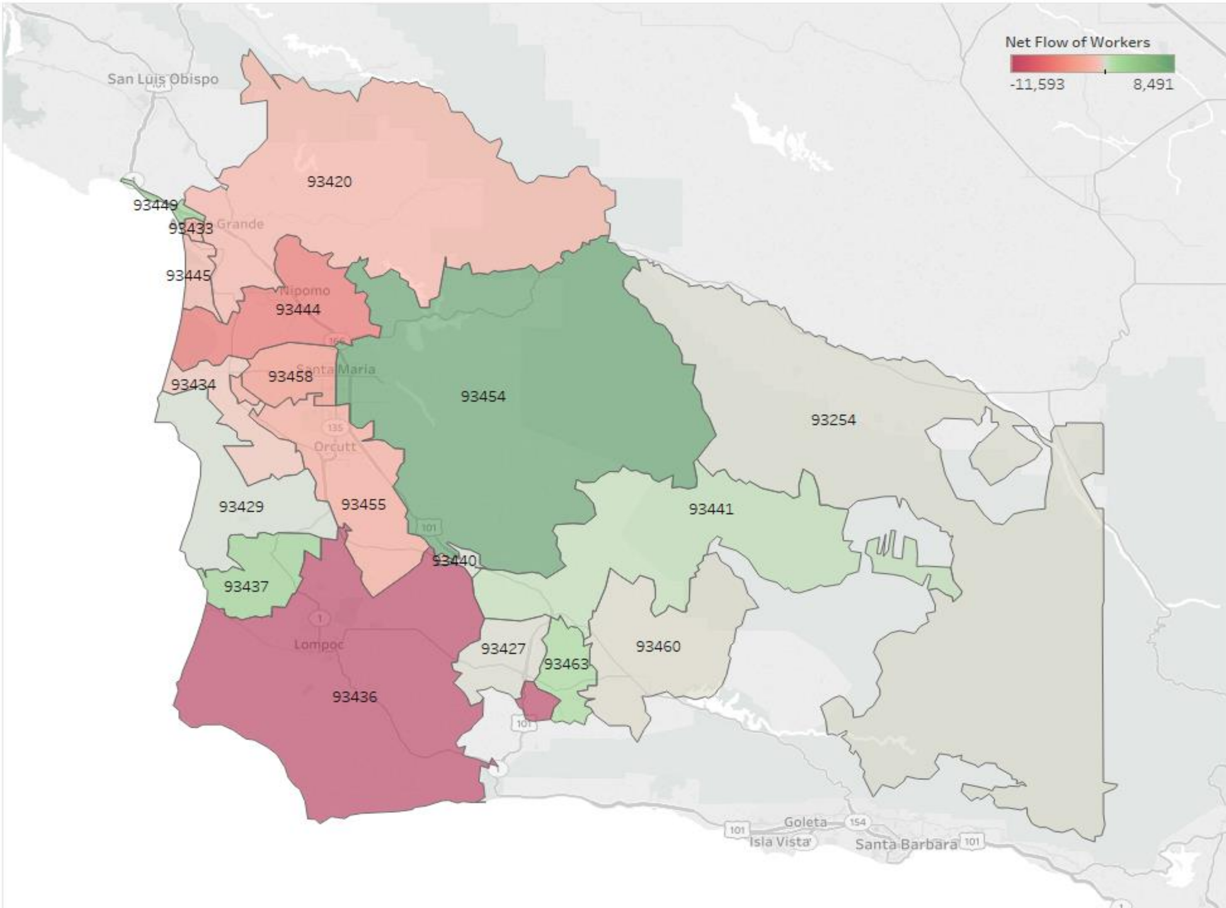
Figure 6. Jobs in NSB Region and Resident Workers[10]



Lompoc (93436) has a net 11,600 residents leave the NSB region for work. In contrast, the zip code 93454, near Santa Maria, has a net flow of about 8,500 workers that commute from outside of the NSB region (Figure 7). These numbers suggest that, in net, many NSB residents are leaving the region to work in neighboring Santa Barbara and San Luis Obispo.

[10] EMSI 2020.2

Figure 7. Net Flow of Workers by Zip Code (2019)[11]

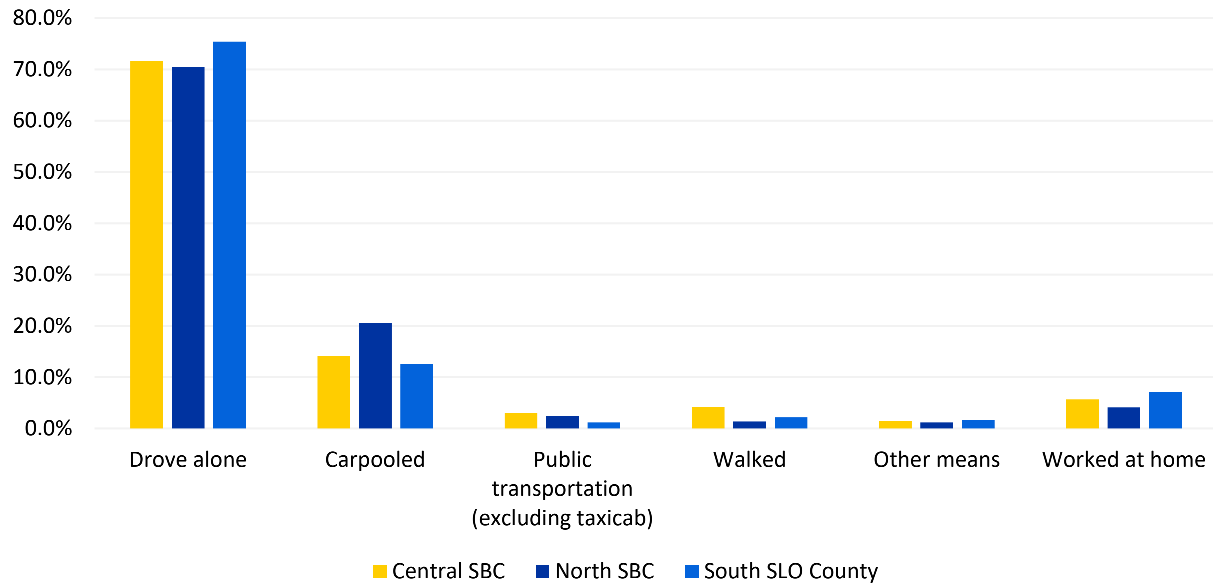


Commuting Patterns

Residents in the NSB region have a longer median commute than broader Santa Barbara County but a shorter commute than the state average. The median commute time is 22.8 minutes for NSB residents, 19.8 minutes across the broader county, and 29.3 minutes statewide. Driving is by far the most popular means of transportation; about one in ten residents commute by some means other than driving alone or carpooling (Figure 8).

[11] EMSI 2020.2

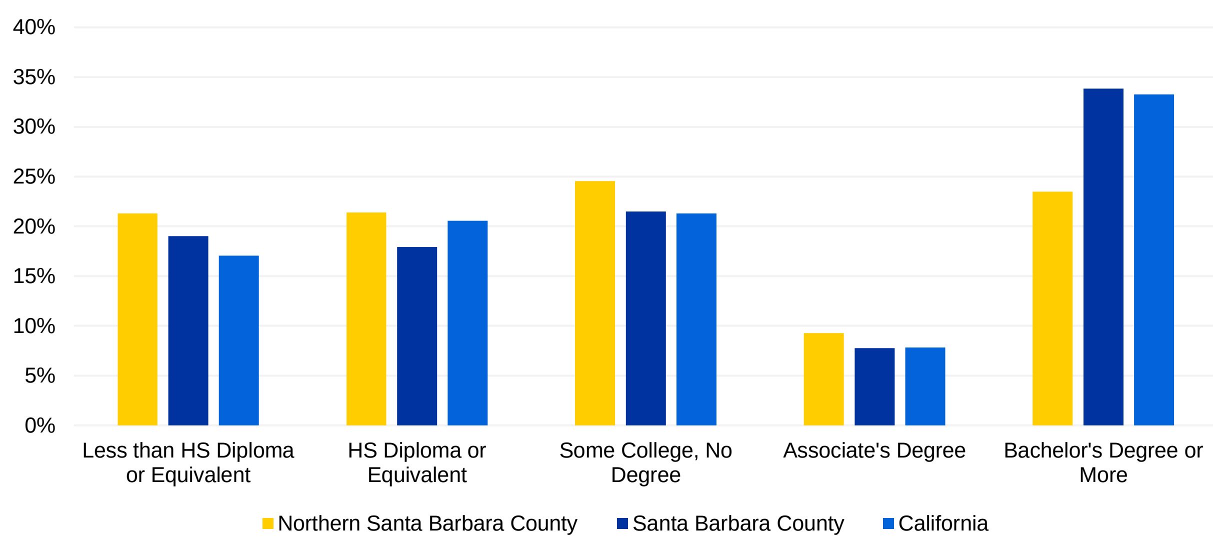
Figure 8. Means of Commuting by NSB sub-region (2018)[12]



Educational Attainment

The Northern Santa Barbara County (NSB) region's adult population has lower educational attainment rates than the broader county and state. More than four-in-ten residents 25 years of age or older have at most a high school diploma. Conversely, just under a quarter of the NSB population has a Bachelor's degree or higher (Figure 9). The proportion of adults over the age of 25 with a Bachelor's degree or higher has increased slightly since 2013 by about two percentage points. At the same time, the proportion of individuals with less than a high school diploma or equivalent has declined by about 1.5 points (Figure 10). These trends are similar to those observed across broader Santa Barbara County and the state, though the changes occurred at a slower rate in the NSB region.

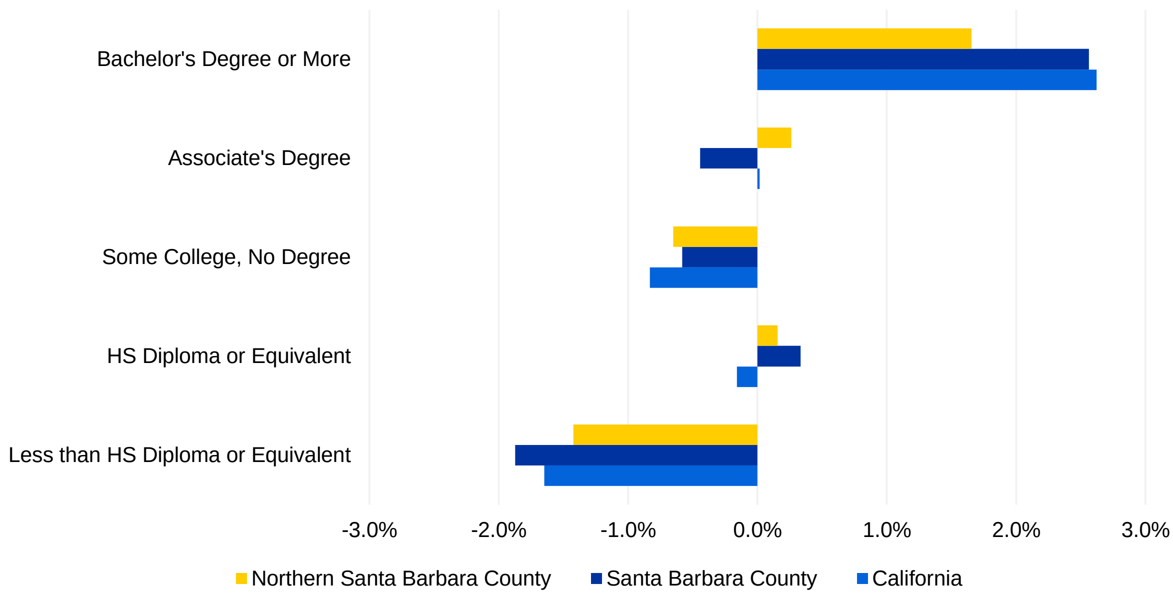
Figure 9. Educational Attainment Population Age 25 and Older (2018)[13]



[12] 2018 ACS 5-Year Estimates. United States Census Bureau.

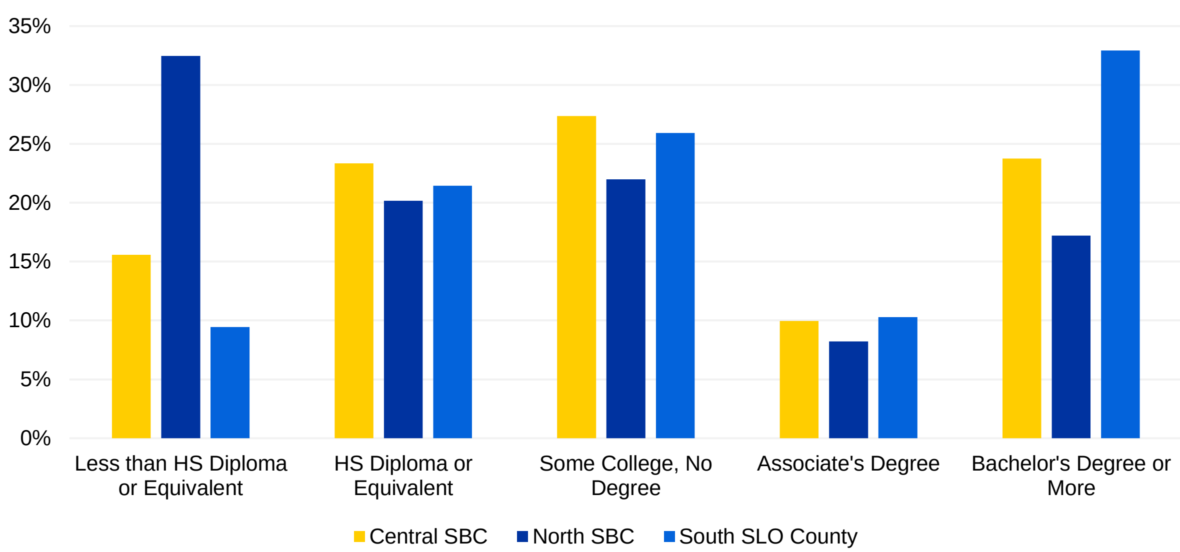
[13] 2018 ACS 5-Year Estimates. United States Census Bureau.

Figure 10. Change in Educational Attainment Population Age 25 and Older (2013 to 2018)[14]



Within the NSB region, the North SBC sub-region has a notably higher population of residents without a high school diploma or equivalent (33%). In contrast, a third of residents (33%) the South SLO sub-region have a bachelor's degree or higher. The Central SBC sub-region lies in between, with more than half (51%) of residents attaining a high school diploma (or equivalent) or some college, no degree (Figure 11).

Figure 11. Educational Attainment by Sub-Region (2018)[15]



[14] 2016 ACS 5-Year Estimates. United States Census Bureau.

[15] 2018 ACS 5-Year Estimates. United States Census Bureau.

Household Income

The NSB region has a greater share of middle-income households than Santa Barbara County and state averages. Nearly two-thirds of NSB households had an income between $35,000-$149,000 in 2018. The NSB region has a notably lower proportion of higher-income households (14%), earning $150,000 or more a year compared to the county and state average (19%) (Figure 12).

Figure 12. Distribution of Annual Household Income (2018)[16]

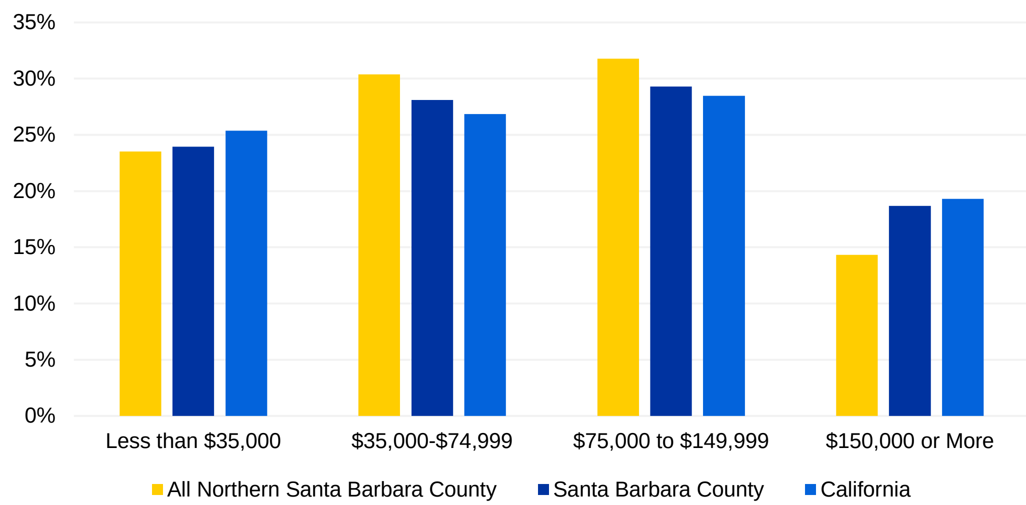
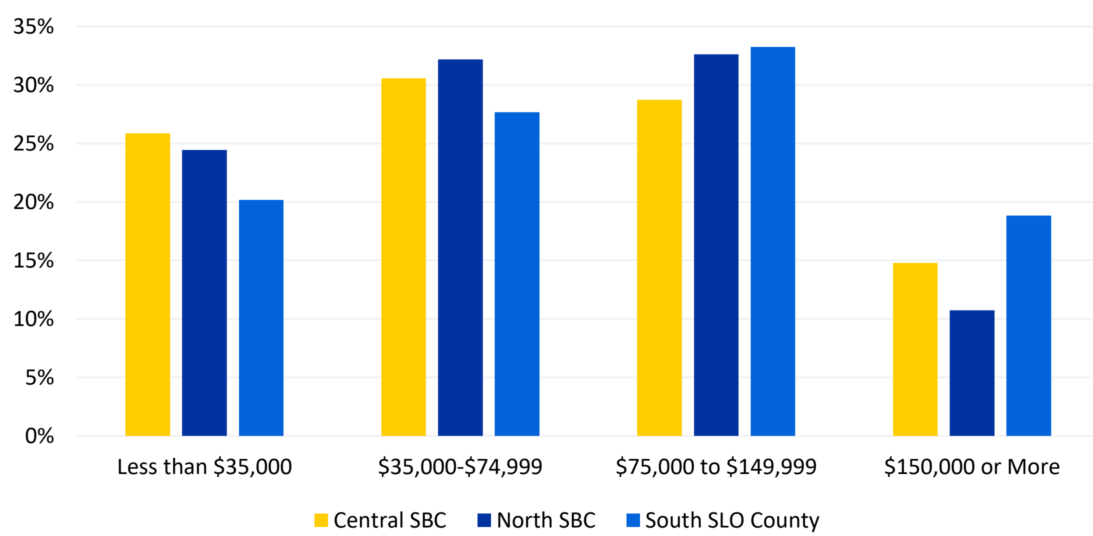


Figure 13. Distribution of Annual Household Income in NSB sub-regions (2018)[17]



[16] 2018 ACS 5-Year Estimates. United States Census Bureau.

[17] 2018 ACS 5-Year Estimates. United States Census Bureau.

Job Quality

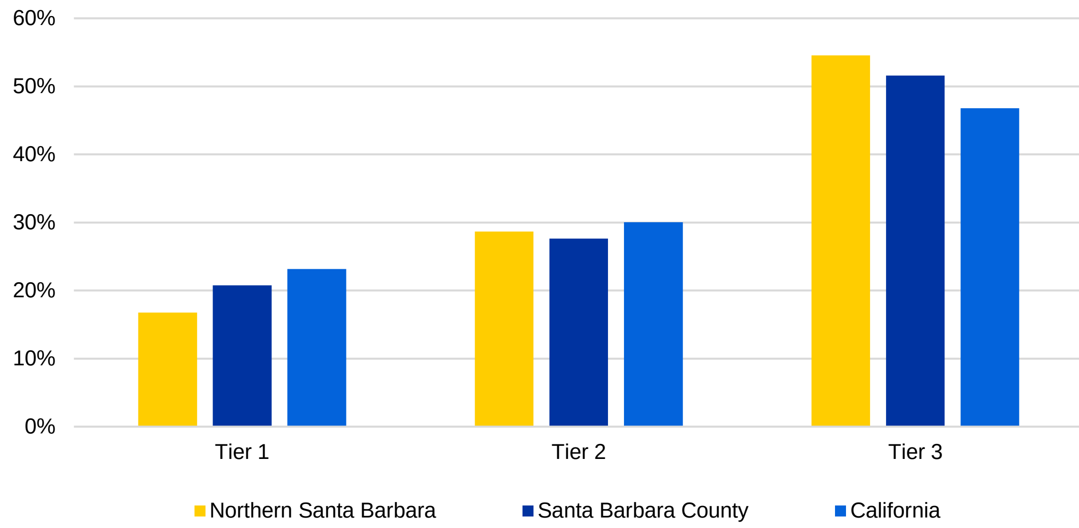
Job quality is an important measure of the quality of employment in a region. Job quality—determined by a job's required skillsets and average pay —has a notable impact on jobholders' livelihoods and can mean the difference between struggling to make ends meet and earning a comfortable and sustainable income.

This report categorizes jobs into three different quality categories:

Tier 1 Occupations	Tier 2 Occupations	Tier 3 Occupations
Tier 1 occupations are typically the highest-paying, highest-skilled occupations in the economy. 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. **Average Earnings: $89,317**	Tier 2 occupations are typically the middle-skill, middle-wage occupations. 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). **Average Earnings: $51,892**	Tier 3 occupations are typically the lowest-paying, lowest-skilled occupations that have historically provided the largest portion of employment in the region. These occupations include positions such as security guards, foodservice and retail positions, building and grounds cleaning positions (e.g., Janitors), and personal care positions (e.g., Home Health Aides and Child Care Workers). **Average Earnings: $28,967**

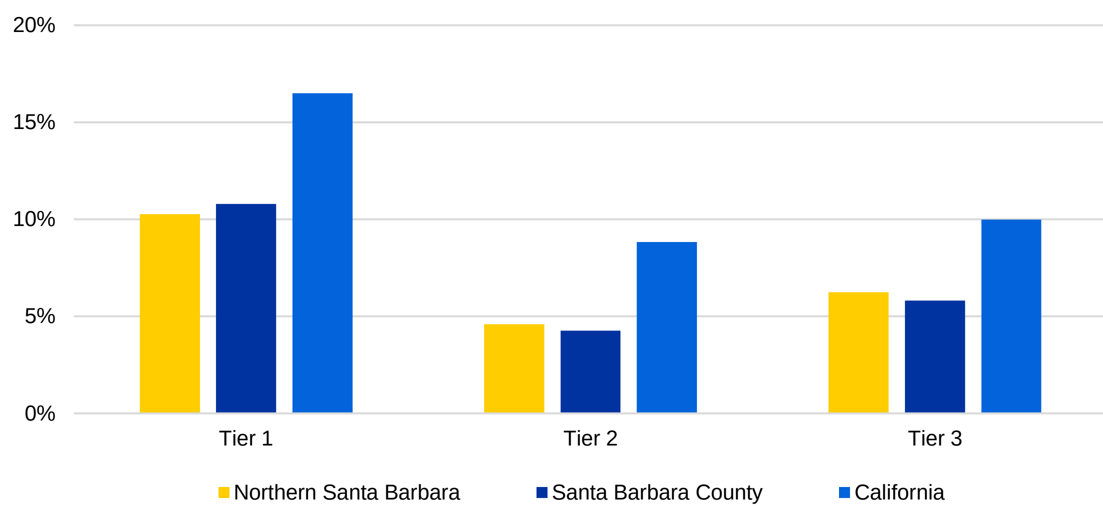
Job quality in the NSB region is lower than that in broader Santa Barbara County and state. The NSB region has a greater share of tier 3 jobs and a lower proportion of tier 1 jobs. This means that there is a greater concentration workers holding lower-wage, lower-skill jobs and a lower concentration of higher-skill, higher-wage jobs in the NSB region than in Santa Barbara County and the state (Figure 14). Lower job quality suggests that adult education graduates will have difficulty finding gainful employment with sustainable wages in the NSB region.

Figure 14. Share of Employment by Job Quality (2019)[18]



Tier 1 jobs have had the strongest growth over the past five years in the NSB region. This means that job quality is improving, as the share of tier 1 jobs has increased. However, as Figure 15 shows, this growth rate is still lower than the comparison regions of broader Santa Barbara County and the state. Growth among tier 2 and tier 3 jobs was higher in the NSB region than the broader county.

Figure 15. Growth in Jobs by Job Quality (2014-2019)[19]



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[18] EMSI 2020.2

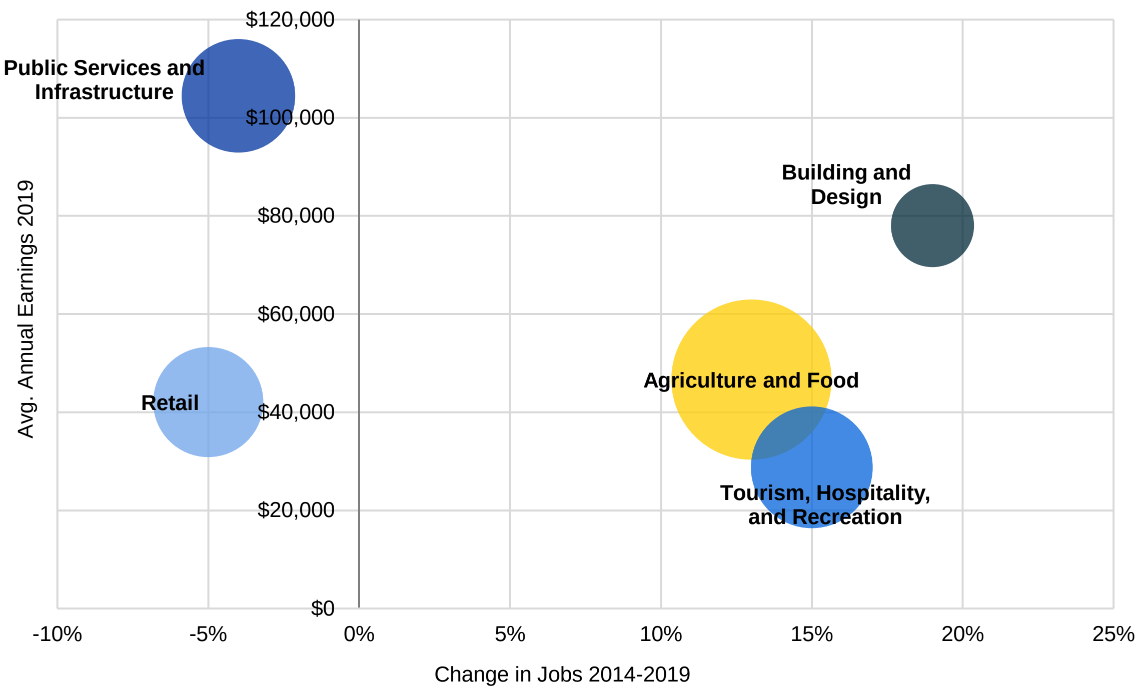
[19] EMSI 2020.2

Industry Cluster Analysis

Analyzing employment through industry clusters provides an understanding of what industries are most prominent, fastest-growing, and those facing declines. Tracking industry clusters is an essential part of training and educating a well-prepared workforce to enter these regionally specific industry dynamics. It should be noted that this data does not include the impact of COVID-19 on employment. The COVID-19 crisis and accompanying lockdowns have disproportionately affected specific industries.

The fastest-growing high concentration industry clusters have average annual earnings of $78,00 per year or less. These industry clusters account for a greater share of the NSB employment than the national average. Agriculture and food and tourism, hospitality, and recreation have grown 13% and 15%, respectively, but have average annual earnings of $46,600 or less per year (Figure 16).

*Figure 16. High Concentration Industry Clusters (2019 Employment) ** [20]

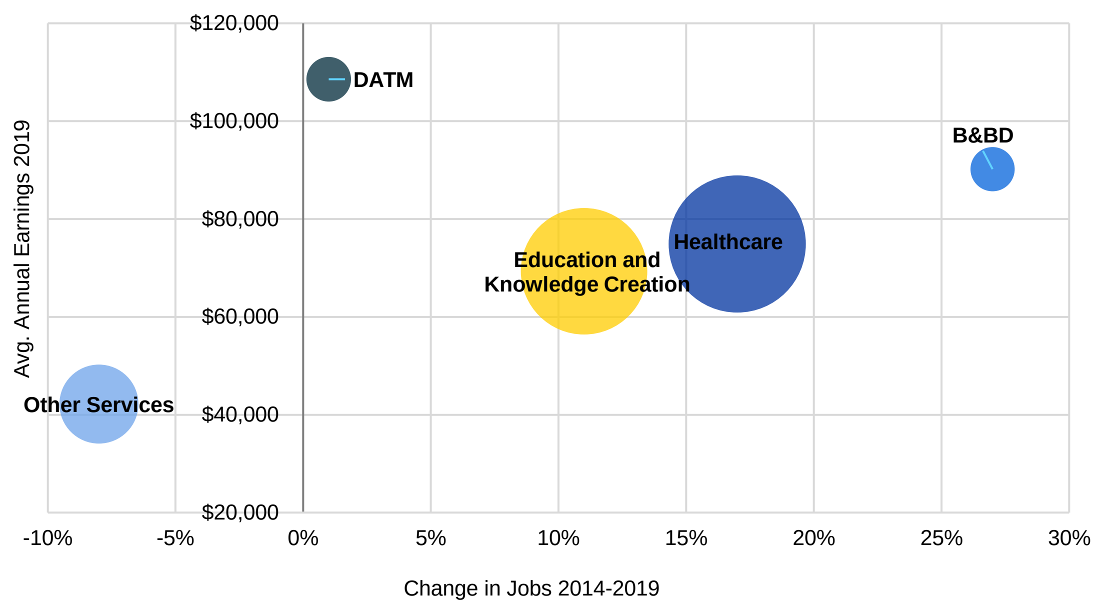


**Size of the bubble reflects the number of jobs in 2019*

The biotechnology and biomedical devices (B&BD) industry grew by 27% between 2014-2019. Despite this strong growth, the industry cluster is still relatively small. The healthcare and education industry clusters each have about ten times the number of jobs as B&BD but saw notable growth of 17% and 11%, respectively (Figure 17).

[20] EMSI 2020.2

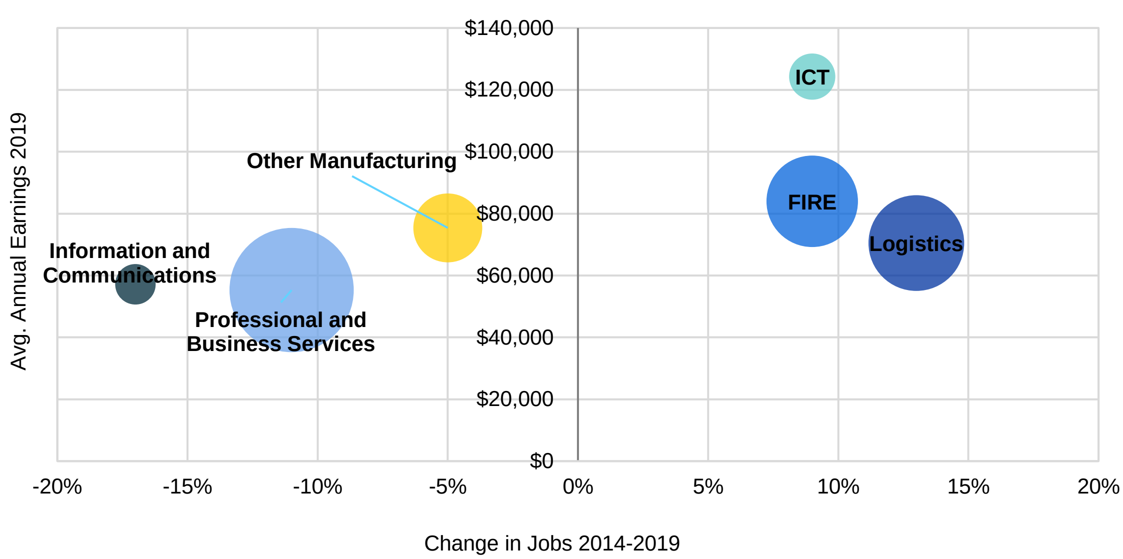
*Figure 17. Average Concentration Industry Clusters (2019 Employment) * 21*



**Size of the bubble reflects the number of jobs in 2019*

These six industry clusters have concentrations that are, at most, half as concentrated as the national average. Despite their low concentrations, logistics, finance, insurance, real estate & banking (FIRE), and information and communication technologies (ICT) all saw growth of 9% or higher between 2014 and 2019 (Figure 18).

*Figure 18. Low Concentration Industry Clusters (2019 Employment) * 22*



**Size of the bubble reflects the number of jobs in 2019*

[21] EMSI 2020.2
[22] EMSI 2020.2

Selected Regional Cluster Analysis

This section highlights four key industry clusters selected based on their historical growth, average earnings, and career pathways. This section will provide a deeper understanding of the selected industry clusters by looking at job quality and some of the available career pathways.

Building & Design

The Building & Design industry cluster consists of firms and industries that design, construct, and repair buildings and infrastructure.

Number of Jobs in NSB Region: 6,794

TIER 1	TIER 2	TIER 3
25.2%	64.0%	10.8%

Table 2. Building and Design Career Pathways [23]

	Entry-Level	Mid-Level	Senior Level
Design and Pre-Construction *This segment includes the drafting, designing, and planning stages of the construction process*	**Architectural and Civil Drafters** Median Hourly Earnings: $27.26 Typical Education: Associate's degree	**Project Management Specialists** Median Hourly Earnings: $30.95	**Civil Engineer** Median Hourly Earnings: $51.44 Typical Education: Bachelor's degree
Construction *This segment includes the foundation work, wiring, and building process*	**Construction Laborers** Median Hourly Earnings: $21.56 Typical Education: No formal education credential	**Electrician** Median Hourly Earnings: $28.43	**Construction Managers** Median Hourly Earnings: $45.65 Typical Education: Bachelor's degree
Maintenance & Operations *This segment includes maintenance, repair, and operational activities required to maintain facilities and infrastructure*	**General Maintenance and Repair Workers** Median Hourly Earnings: $19.76 Typical Education: High school diploma or equivalent	**First-Line Supervisors of Mechanics, Installers, and Repairers** Median Hourly Earnings: $36.03	**General and Operations Managers** Median Hourly Earnings: $44.81 Typical Education: Bachelor's degree

[23] EMSI 2020.2

Many of the industrial technology programs available at AHC are good entryways into these pathways. Programs like architectural drafting, welding technology, and engineering technology all offer students foundations they would need to enter a number of Building & Design pathways. The survey of employers suggests that drafting experience is in particularly high demand, with 83% of building and construction employers having at least ‘some interest’ in courses that provide drafting experience.

Healthcare

The Healthcare industry cluster includes industries and firms that provide medical diagnoses and treatment and includes allied health roles.

Number of Jobs in NSB Region: 13,229

TIER 1	TIER 2	TIER 3
28.0%	29.2%	42.8%

Table 3. Healthcare Career Pathways [24]

	Entry-Level	Mid-Level	Senior Level
Patient Services *This segment includes workers who attend and provide medical care to patients*	**Certified Nurse Assistant CNA** Median Hourly Earnings: $17.35 Typical Education: Postsecondary nondegree award	**Licensed Practical and Licensed Vocational Nurses** Median Hourly Earnings: $28.64	**Registered Nurse** Median Hourly Earnings: $50.77 Typical Education: Bachelor's degree
Medical Administration *This segment includes activities centered around the administration of healthcare activities*	**Medical Secretaries and Administrative Assistant** Median Hourly Earnings: $19.72 Typical Education: High school diploma or equivalent	**Health Technologists and Technicians** Median Hourly Earnings: $21.98	**Administrative Services and Facilities Managers** Median Hourly Earnings: $44.98 Typical Education: Bachelor's degree
Diagnostic Services *This segment works to find and diagnose the root causes of medical ailments*	**Medical Assistants** Median Hourly Earnings: $17.67 Typical Education: Postsecondary nondegree award	**Radiological Technologists and Technicians** Median Hourly Earnings: $41.41	**Physician's Assistant** Median Hourly Earnings: $57.60 Typical Education: Master's degree

Strong growth in the healthcare industry suggests that there will be continued demand for students completing the dental assisting, medical assisting, and nursing programs at AHC. Furthermore, all of these programs start students onto pathways with strong earnings and growth potential.

[24] EMSI 2020.2

Finance, Insurance, Banking, and Real Estate (FIRE)

The Finance, Insurance, Banking, and Real Estate industry cluster includes industries and firms that specialize in financial management and transactions, insurance and actuarial activities, and real estate transactions.

Number of Jobs in NSB Region: 2,884

TIER 1	TIER 2	TIER 3
27.5%	42.8%	29.7%

Table 4. Finance, Insurance, Banking, and Real Estate Career Pathways [25]

	Entry-Level	Mid-Level	Senior Level
Banking *This segment includes the staff that work at banks, credit unions, and other financial institutions available to the public*	**Tellers** Median Hourly Earnings: $16.87 Typical Education: High school diploma or equivalent	**Loan Officer** Median Hourly Earnings: $32.78	**General and Operations Manager** Median Hourly Earnings: $44.81 Typical Education: Bachelor's degree
Real Estate *This segment includes activities centered around real estate transactions*	**Property, Real Estate, and Community Association Managers** Median Hourly Earnings: $28.20 Typical Education: High school diploma or equivalent	**Real Estate Sales Agent** Median Hourly Earnings: $30.35	**Real Estate Brokers** Median Hourly Earnings: $60.84 Typical Education: High school diploma or equivalent
Insurance *This segment includes roles within the insurance industry*	**Insurance Claims and Policy Processing Clerks** Median Hourly Earnings: $18.21 Typical Education: High school diploma or equivalent	**Insurance Sales Agents** Median Hourly Earnings: $24.88	**Actuaries** Median Hourly Earnings: $51.18 Typical Education: Bachelor's degree

Sixty percent of FIRE employers surveyed reported at least 'some interest' in a course that provided experience in QuickBooks. The addition or expansion of QuickBooks materials to some programs—such as the Administrative Office Skills certificate—may add value to students and employers.

Defense, Aerospace, & Transportation Manufacturing (DATM)

[25] EMSI 2020.2

The Defense, Aerospace, and Transportation Manufacturing (DATM) industry cluster includes industries and firms focused on the design, production, and sale of products related to the defense, aerospace, and transportation industries.

Number of Jobs in NSB Region: 1,400

TIER 1	TIER 2	TIER 3
46.8%	22.2%	31.0%

Table 5. Defense, Aerospace, & Transportation Manufacturing Career Pathways [26]

	Entry-Level	Mid-Level	Senior Level
Product Design & Development *This segment includes the design and development of defense and transportation products*	**Aircraft Structure, Surfaces, Rigging, and Systems Assemblers** Median Hourly Earnings: $25.80 Typical Education: High school diploma or equivalent	**Aerospace Engineering and Operations Technologists and Technicians** Median Hourly Earnings: $40.25	**Aerospace Engineers** Median Hourly Earnings: $56.16 Typical Education: Bachelor's degree
Finance *This segment includes activities centered around the financial and operations divisions*	**Production, Planning, and Expediting Clerks** Median Hourly Earnings: $25.42 Typical Education: High school diploma or equivalent	**Management Analysts** Median Hourly Earnings: $36.19	**General and Operations Managers** Median Hourly Earnings: $45.65 Typical Education: Bachelor's degree
Sales & Business Development *This segment includes roles focused on sales and development of partnerships and relationships*	**Customer Service Representatives** Median Hourly Earnings: $18.18 Typical Education: High school diploma or equivalent	**Sales Representative, Technical and Scientific Products** Median Hourly Earnings: $37.24	**Sales Engineers** Median Hourly Earnings: $75.51 Typical Education: Bachelor's degree

DATM is another industry where AHC's strong portfolio of Industrial Technology programs is an asset. In fact, our employer survey found that 71% of manufacturing employers have at least 'some interest' in courses that offer welding experience, and another 86% have at least 'some interest' in courses that offer machining experience.

Regional Employer Analysis

BW Research conducted a survey of over 100 employers in the NSB region between July 7 – August 11, 2020. Respondents were asked an array of questions, including their industry, workforce challenges, awareness and collaboration with regional educators and training providers, and

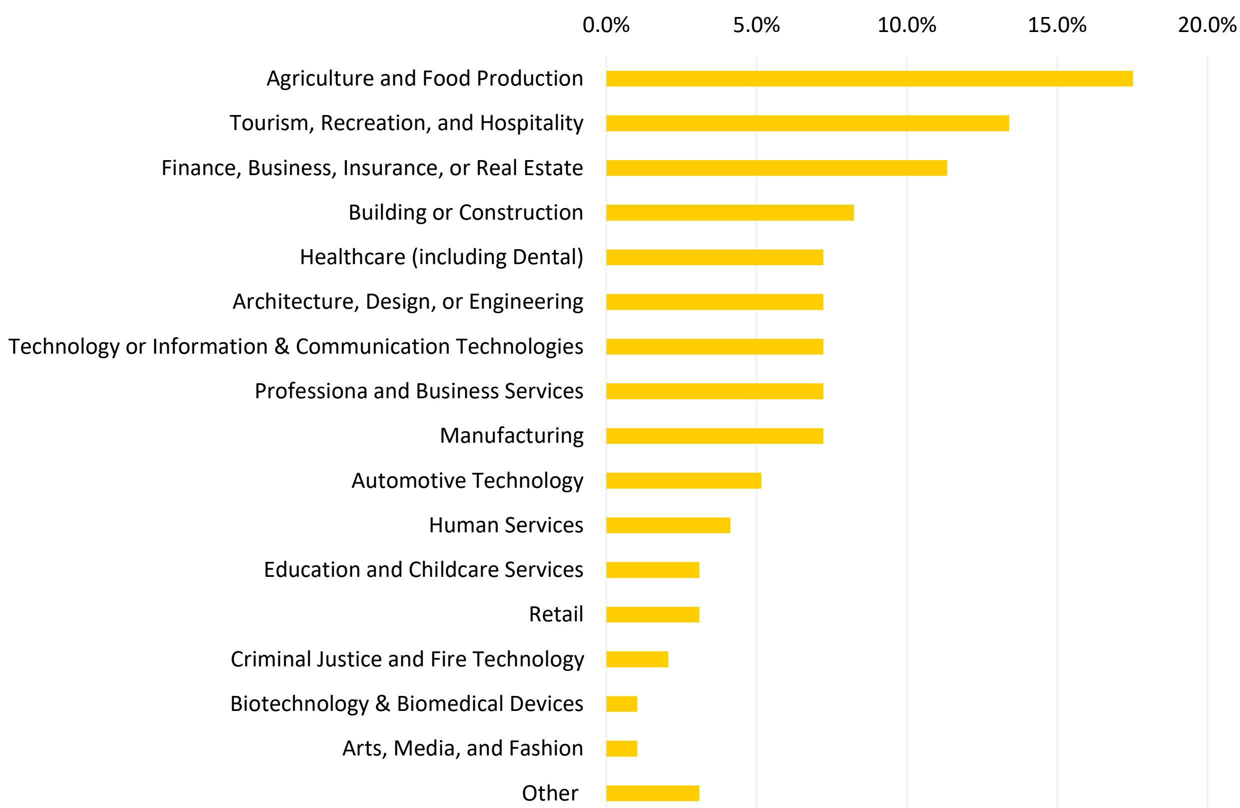
[26] EMSI 2020.2

the impacts of the COVID-19 Pandemic. This survey's key findings are found below, and the survey toplines can be found in Appendix D: Employer Survey Toplines.

Employer Characteristics and COVID-19 Impacts

Seven percent of respondents had shut down their business because of the Pandemic and had not reopened at the time of taking the survey. The respondents who had not reopened their business were most involved in Agriculture and Food Production, Finance, Business, Insurance, & Real Estate, and Manufacturing. Of all respondents, Agriculture and Food Production & Tourism, Recreation, and Hospitality firms were the most common (Figure 19). The median number of employees was 11, and a majority (64%) anticipated having the same number of permanent employees 12 months from [the time of taking the survey].

Figure 19. Industries of Employer Survey Respondents



Most (64%) employers surveyed had experienced some negative impacts from COVID-19. Only 7% of respondents reported permanent effects that prevented them from reopening their business—a proportion smaller than the share of respondents who stated there had been little to no impact on their business (Figure 20). In fact, nearly three-quarters (73%) of respondents reported that they did not furlough any of their employees. A number of employers still faced difficult choices; nearly one-in-six (14%) reported that they had furloughed employees and did not expect to bring them back (Figure 21).

Figure 20. Has COVID-19 had a Negative Impact on Your Business?

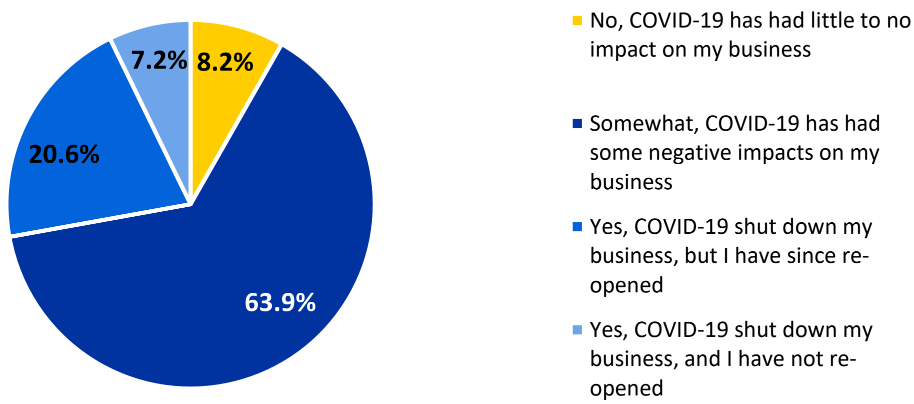
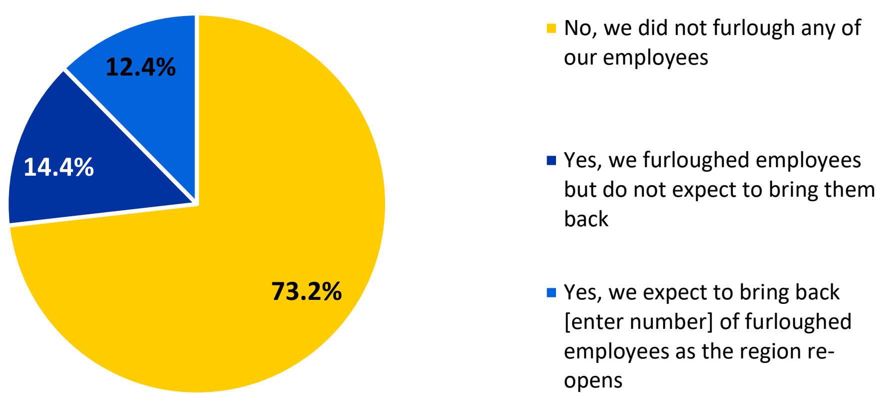
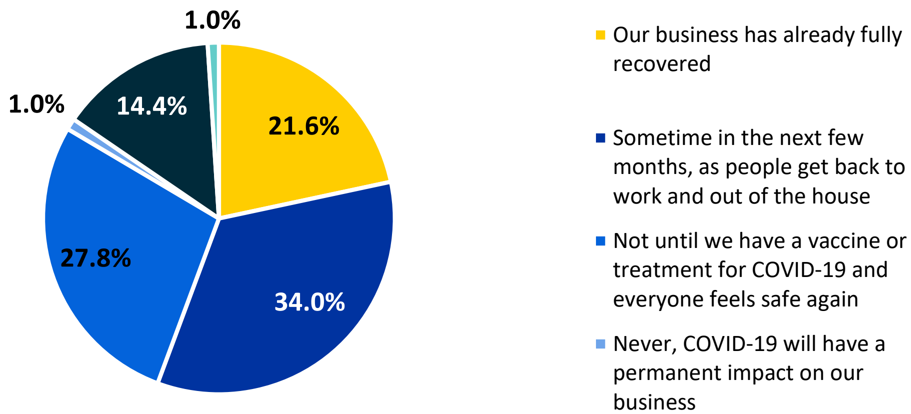


Figure 21. Do You Have Any Furloughed Employees that You Expect to Bring Back as the Region Re-Opens?



Expected recovery times are more varied; about a third of respondents expected to recover within the next few months as people left their homes and returned to work, and 22% reported already recovering. More than four-in-ten (43%) respondents had more grim outlooks; 28% reported they would not recover until a vaccine is developed, and another 14% was not sure when they would be able to recover (Figure 22).

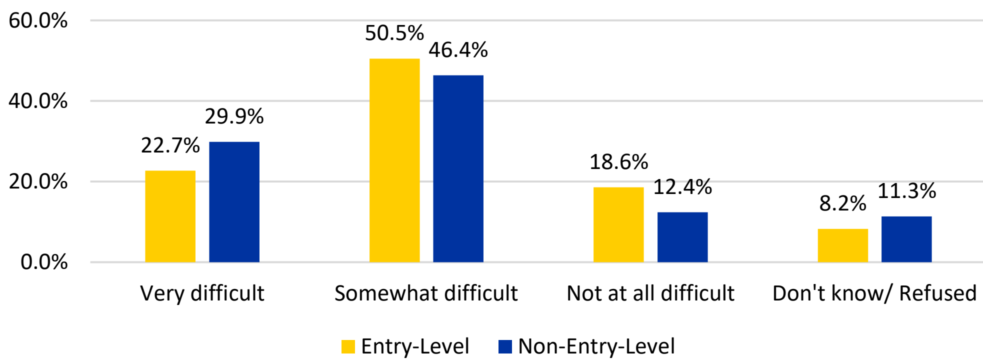
Figure 22. When Do You Expect Your Business to Fully Recover From the Impacts of COVID-19?



Hiring and Talent Challenges

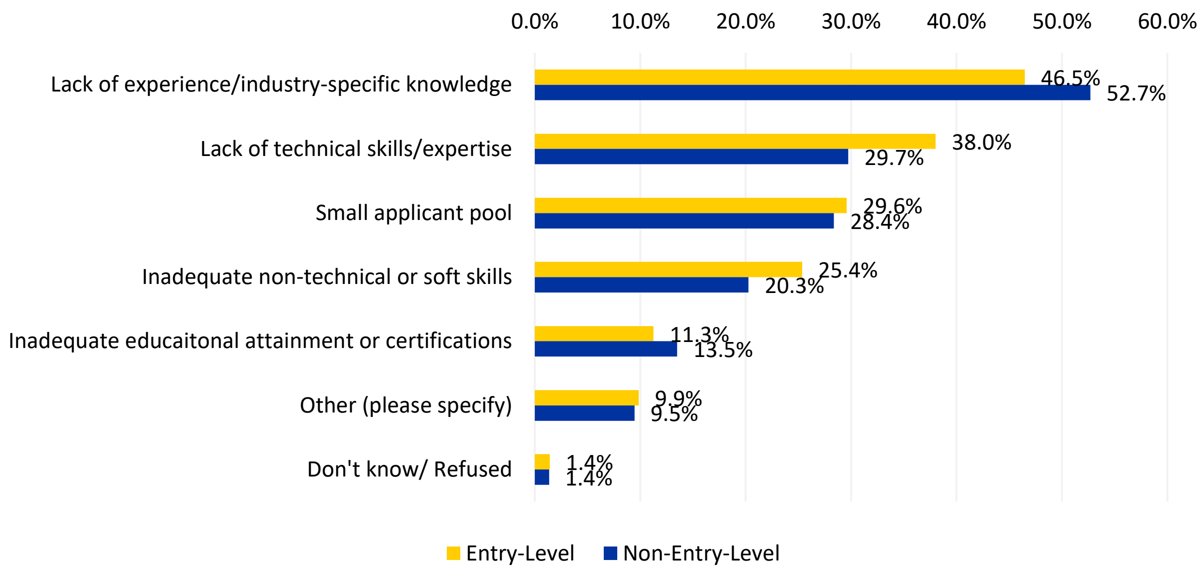
Employer and manager survey respondents reported moderate difficulty hiring both entry-level and non-entry-level talent. A plurality of respondents for both entry-level (51%) and non-entry-level (46%) reported it is 'somewhat difficult' to find talent. A slightly higher proportion of respondents reported it is 'very difficult' to hire non-entry-level talent (30%) compared to entry-level talent (23%) (Figure 23).

Figure 23. Difficulty Finding Qualified Talent



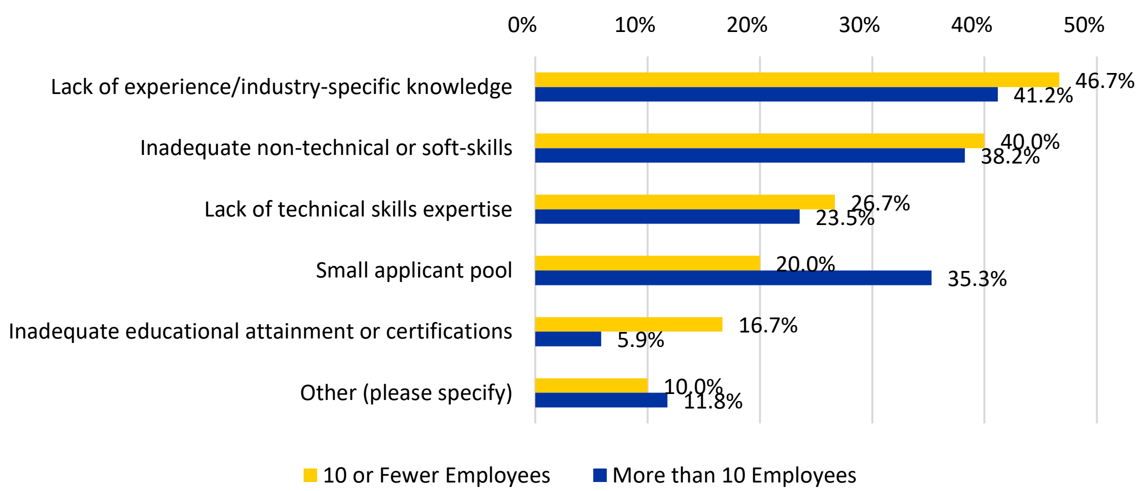
Hiring challenges trend similarly for both entry-level and non-entry-level talent. For both entry-level (47%) and non-entry-level (53%) hires, a lack of experience and industry-specific knowledge was the most commonly cited reason for hiring difficulty. A 'lack of technical skills and expertise' and a 'small applicant pool' were the two next-most commonly cited reasons, with about three-in-ten respondents choosing each option (Figure 24).

Figure 24. Two-Greatest Reasons for Hiring Difficulty



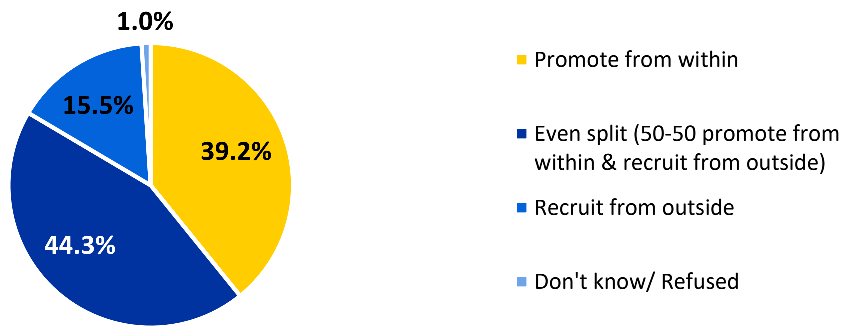
Small business employers cited a lack of experience and inadequate non-technical skills more often than employers with more than 10 employees. The greatest discrepancy between small and larger businesses was among education attainment and certifications; small businesses cited this as a top reason for hiring difficulty nearly three times more often than the counterparts with more employees (Figure 25).

Figure 25. Two-Greatest Reasons for Entry-Level Position Hiring Difficulty by Business Size



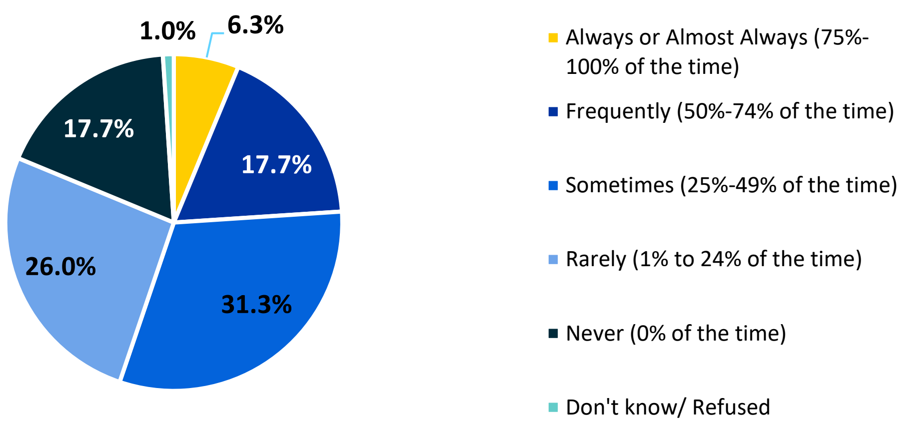
Employers tend to look within for non-entry-level talent. Forty percent of respondents stated they primarily fill these roles by promoting within, and another 44% reported an even mix of internal promotion and outside hires. Only 16% of respondents reported hiring non-entry-level talent exclusively external (Figure 26).

Figure 26. Sources of Non-Entry-Level Talent



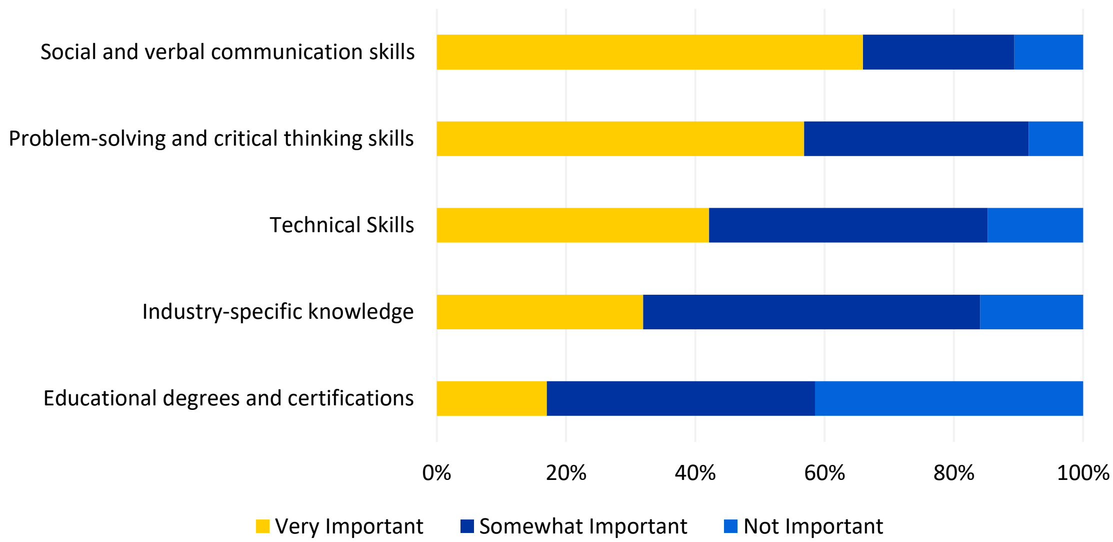
Three-quarters of respondents stated they recruit talent from outside of the NSB region less than half of the time. More than four-in-ten respondents (44%) reported recruiting talent from outside the NSB region less than a quarter of the time. Another 31% reported recruiting talent from outside the region 25%-49% of the time.

Figure 27. How Often Do You Recruit Talent Outside of Northern Santa Barbara County?



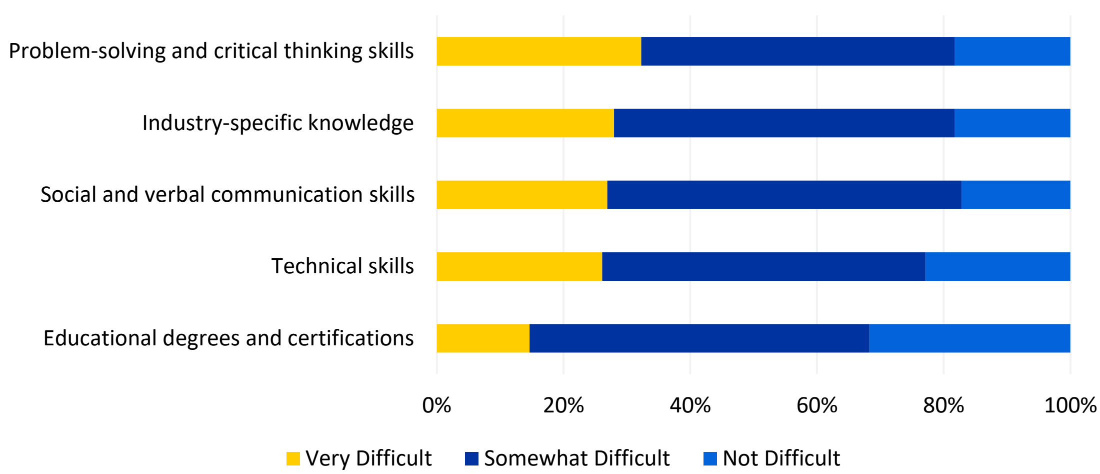
'Social and verbal communication' and 'problem-solving and critical thinking' are the two skills that employers cite as most important for positions requiring less than a four-year degree. Two-thirds (66%) of respondents ranked 'social and verbal communication as "very important" and 57% similarly ranked "problem-solving and critical thinking" as "very important. 'Industry-specific knowledge' and 'education degrees and certifications' are perceived to be the least important, with only 11% and 8% of respondents saying they are 'very important' (Figure 28).

Figure 28. Importance of Each for Positions Requiring Less Than a Four-Year Degree



Employers generally feel that these skills and abilities are moderately difficult to find for positions requiring less than a four-year degree. In fact, fewer than a third of respondents feel that any of the listed skills and characteristics were 'very difficult' to find in candidates. Conversely, about at least half of all respondents feel that the listed skills and characteristics are 'somewhat difficult' to find (Figure 29).

Figure 29. Difficulty Finding Talent with Each for Positions Requiring Less Than a Four-Year Degree



There is a general consensus among employers of which skills and abilities are in greatest need. Based on the share of 'great need' responses and a lack of 'no need responses,' the skills and attributes fall into three categories (Figure 30):

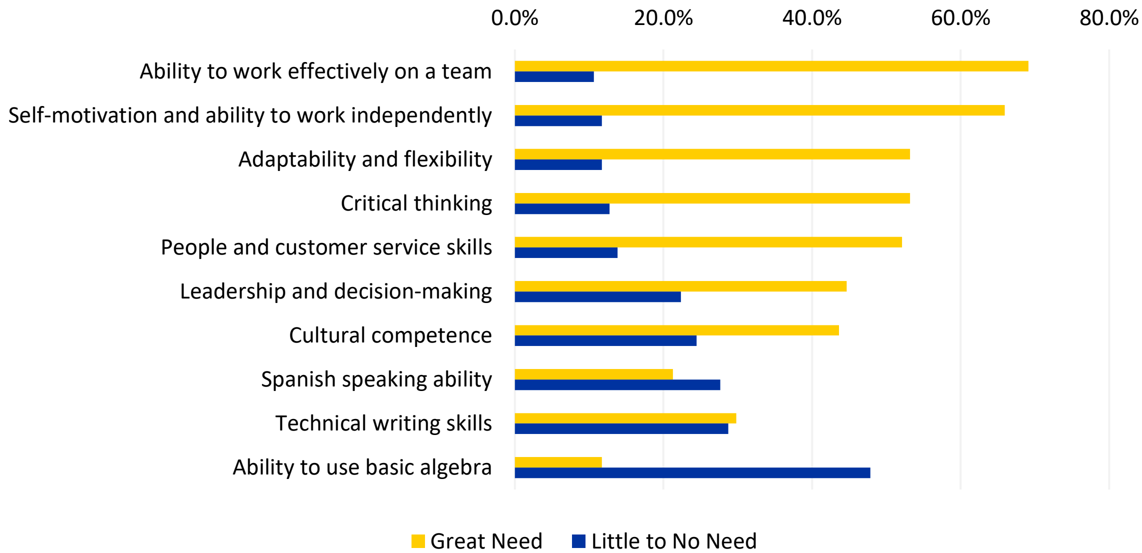
<u>Greatest Need:</u>
- Ability to work effectively on a team
- Self-motivation and ability to work independently

<u>Strong Need:</u>
- Adaptability and flexibility
- Critical thinking
- People and customer service skills

<u>Some to Little Need:</u>
- Leadership and decision-making
- Cultural competence
- Spanish speaking ability

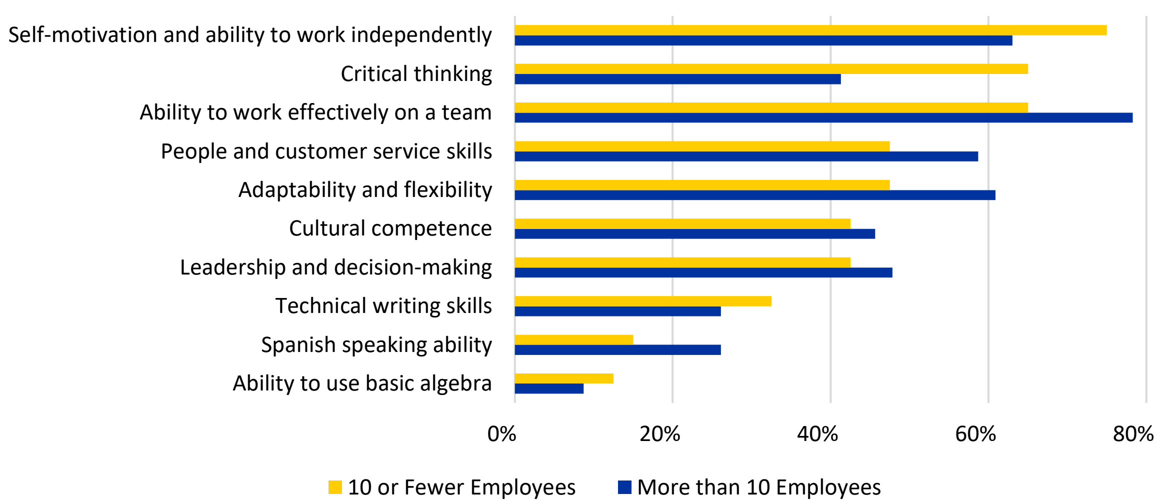
- Technical writing skills
- Ability to use basic algebra

Figure 30. Organization's Need for Skills and Abilities



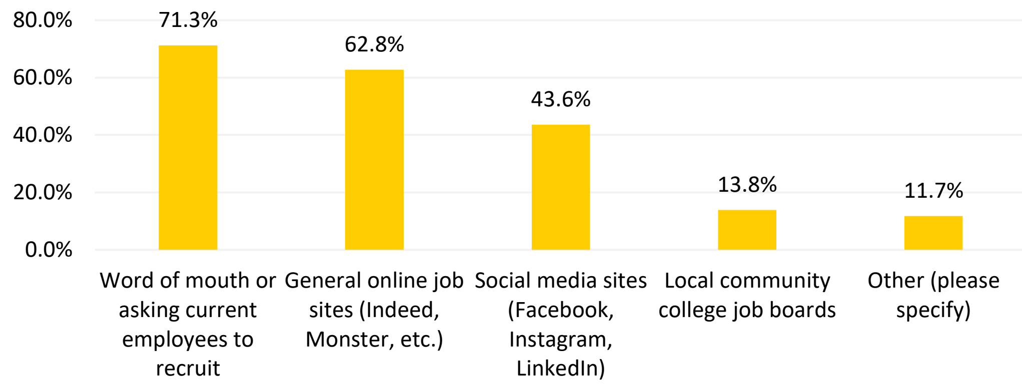
Small businesses (those with 10 or fewer employees) reported greater need for workers who are self-motivated and could think critically. Three-quarters (75%) of small businesses reported great need for workers who are self-motivated and have the ability to work independently. Another 65% of small businesses reported great need for employees who can think critically (Figure 31). These findings are not surprising, as small businesses with limited personnel likely have greater need for employees to operate autonomously and without constant direct oversight.

Figure 31. Organization's with 'Great Need' for Skills and Abilities by Business Size



Word of mouth and general online job posting sites are the most common places employers search for talent. More than four-in-ten (44%) use social media, and fewer than 14% search local community college job boards. Industry-specific online job boards and Craigslist were the most common 'other' responses (Figure 32).

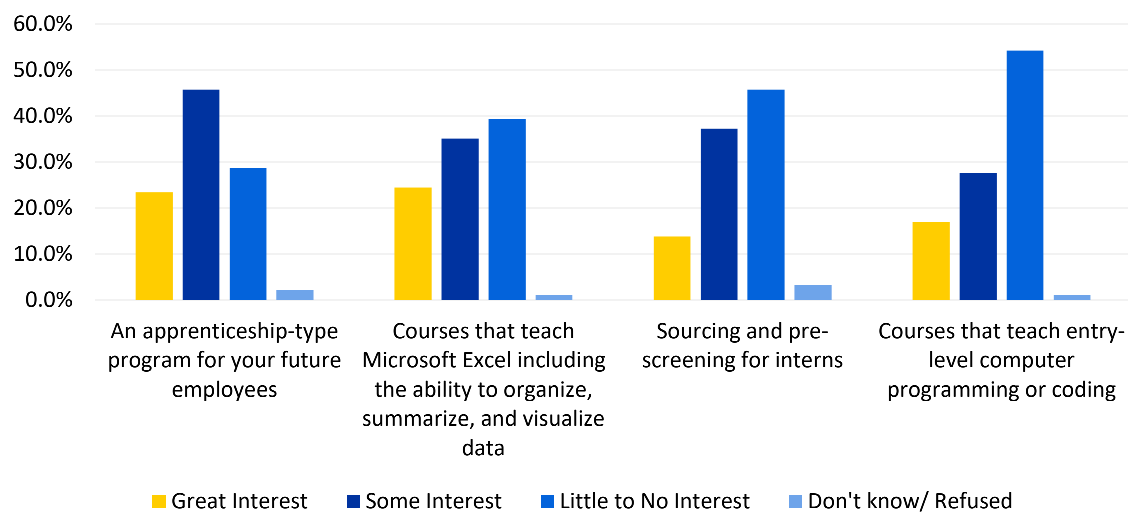
Figure 32. Where Do You Look for Talent?



Relations with Regional Education & Training Providers

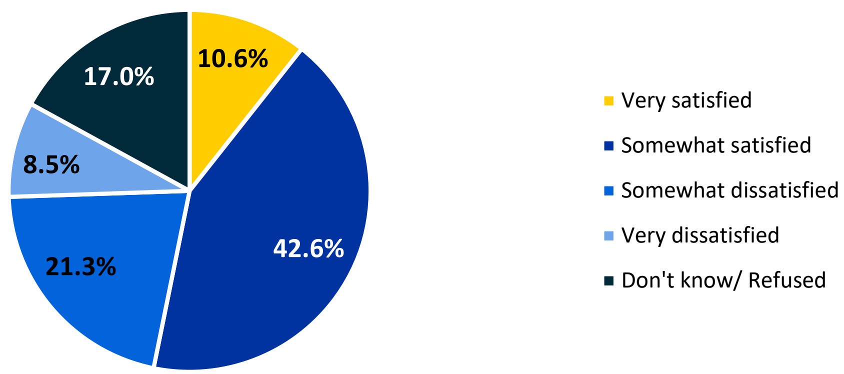
'An apprentice-type program for [their] future employees' received the greatest interest from the employers surveyed. Nearly a quarter of respondents (23%) reported great interest, and another 46% reported 'some interest.' Courses that teach Microsoft Excel also received strong, though slightly less enthusiastic interest. Surprisingly, nearly half (46%) of respondents reported 'little to no interest' in sourcing and pre-screening for interns (Figure 33).

Figure 33. Organization's Interest in Trainings



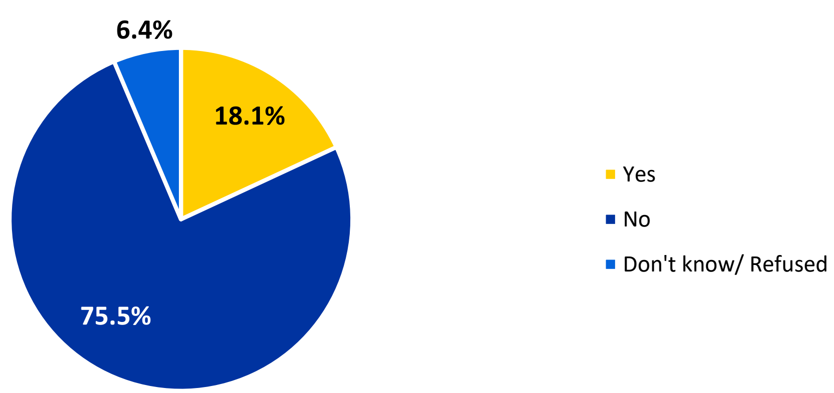
More than half (53%) of employers are at least 'somewhat satisfied' regional educational and training institutes, and fewer than one-in-ten (9%) reported being 'very dissatisfied.' Interestingly, 17% reported they 'did not know,' suggesting that a notable portion of employers are unfamiliar with the education and training institutes in the region (Figure 34).

Figure 34. Satisfaction with Regional Education and Training Institutions



Three-quarters (76%) of employers reported never having worked with a regional educational or training institute. While nearly one-in-five (18%) reported that they had worked with one of these institutions, a substantial majority of employers had not (Figure 35). This suggests there is substantial opportunity for increased partnerships and outreach initiatives.

Figure 35. Has Your Organization Worked with Regional Education or Training Institutions?



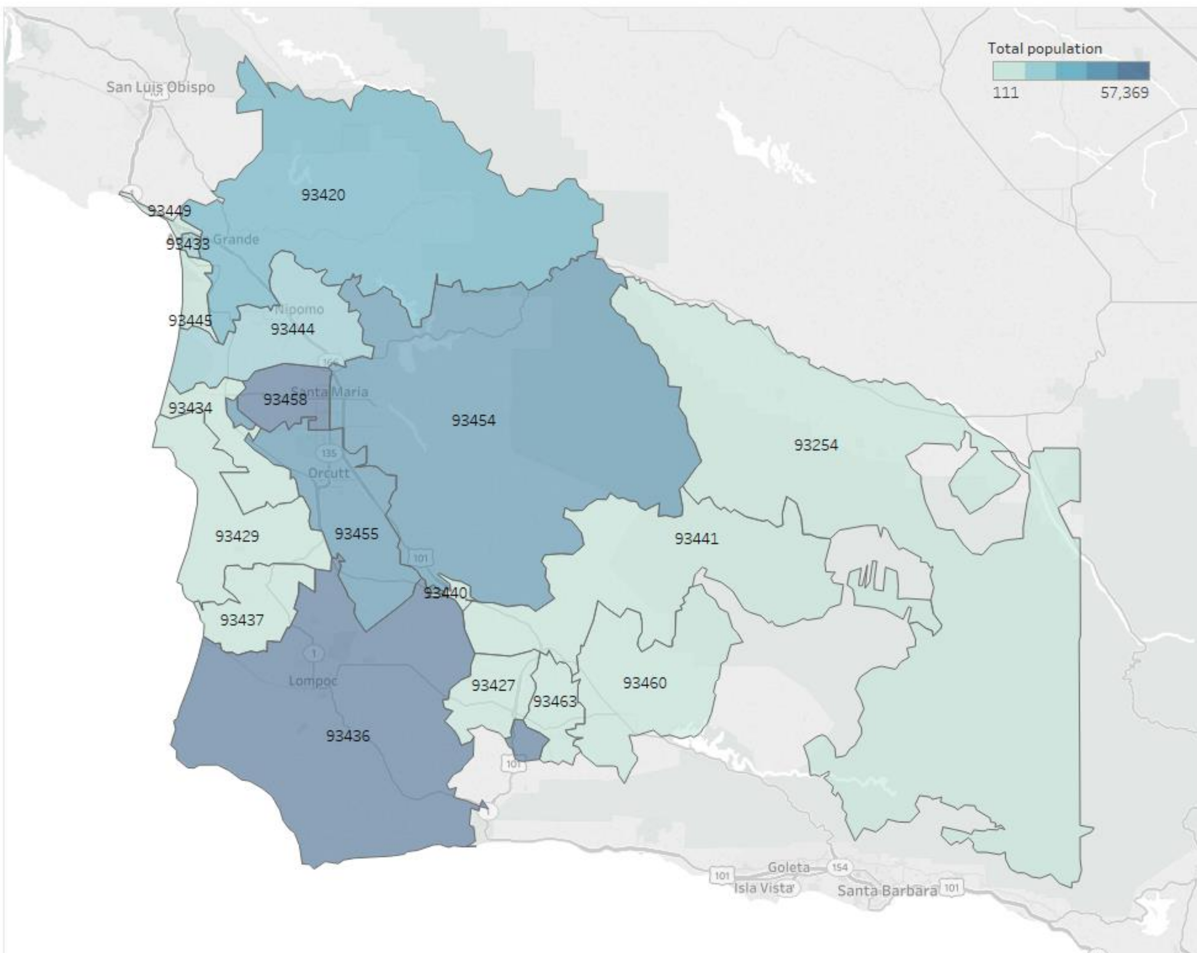
Regional Demographic Overview

This section provides an overview of the characteristics of the NSB population. Understanding the populations' composition and attributes can allow for better strategies in attracting and retaining students.

Population

The NSB region is home to more than 312,000 residents. More than 231,500 residents are 18 years of age or older. Figure 36 displays the population of specific zip codes within the NSB region. Zip codes surrounding Lompoc, Orcutt, Santa Maria, and Arroyo Grande have the largest populations. The zip code 93458 (Santa Maria) has more than 57,300 residents.

Figure 36. Population by Zip Code (2018)[27]



Over the past six years, the NSB region's population has grown at a comparable rate to the state and faster than Santa Barbara County. The NSB region's strong growth compared to Santa Barbara County suggests that the region is becoming increasingly attractive to residents.

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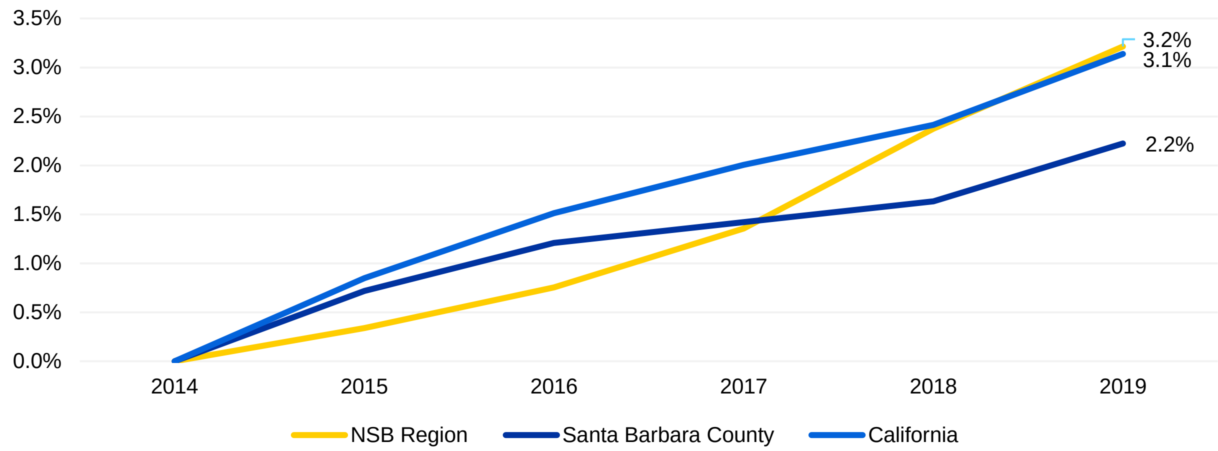
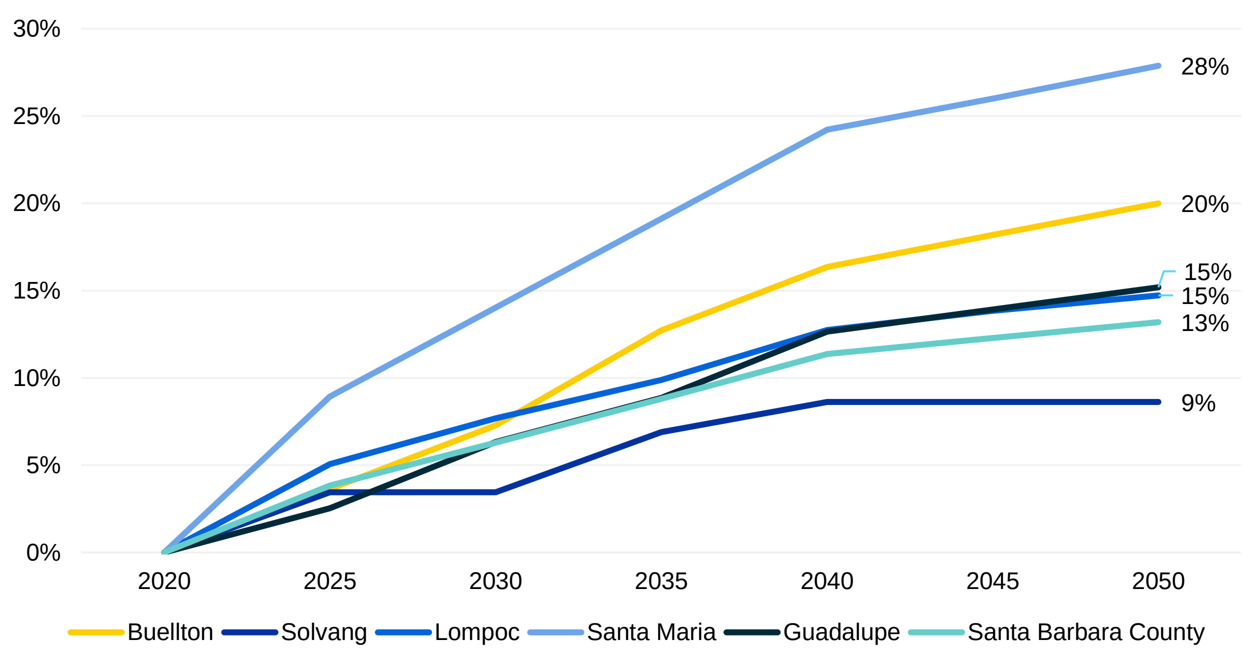
[27] 2018 ACS 5-Year Estimates. United States Census Bureau.

Figure 37. Population Growth[28]



Santa Maria and Buellton are projected to have the greatest population growth over the next 30 years. Santa Barbara County Association of Governments projects that these two jurisdictions will grow by 28% and 20%, respectively. Solvang is the only jurisdiction projected to grow slower than overall Santa Barbara County (Figure 38).

Figure 38. SBAG Population Forecast[29]



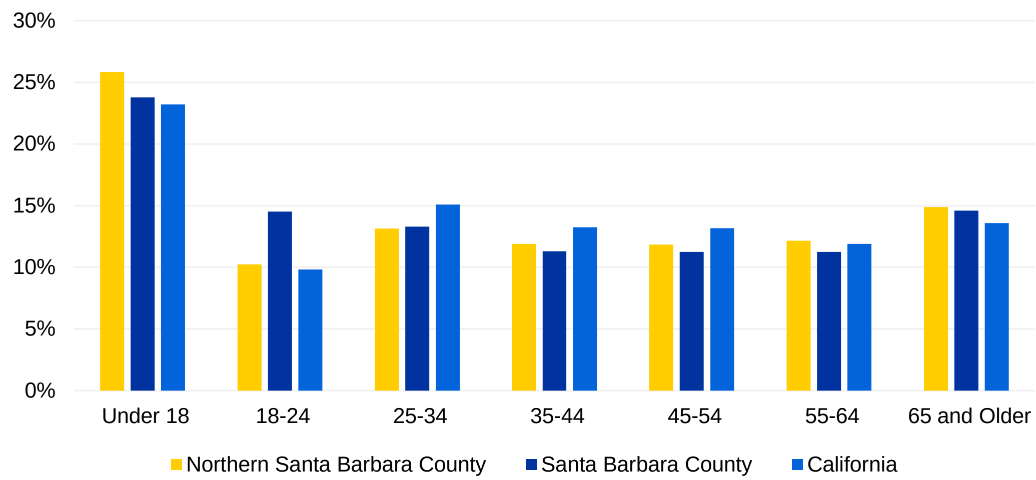
Population Age

The NSB region has a higher proportion of residents aged 55 and older. The region also has a greater share of residents who are under 18 relative to Santa Barbara County and California (Figure 39).

[28] EMSI 2020.2

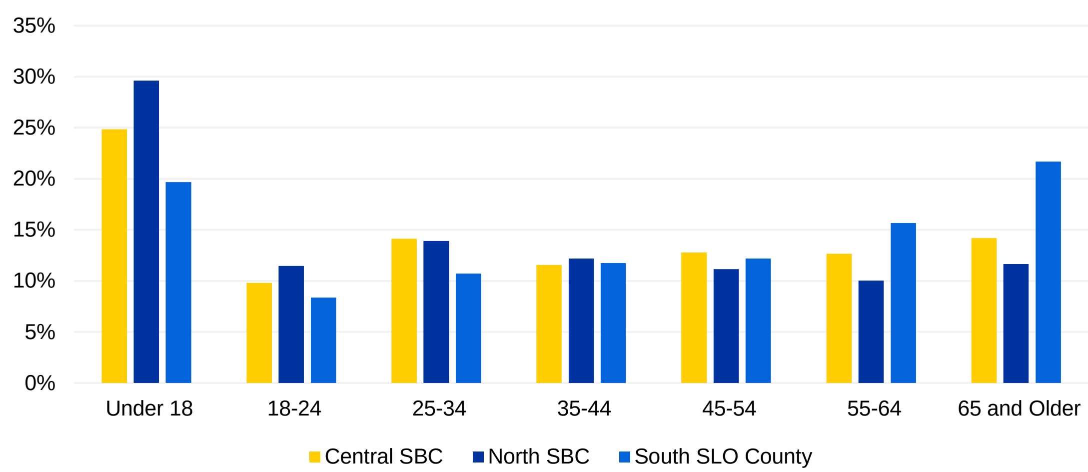
[29] "Regional Growth Forecast 2050 Santa Barbara County" Santa Barbara County Association of Governments. October 2018.

Figure 39. Age Distributions (2018)[30]



More than a third (37%) of South SLO County sub-region residents are 55 years of age or older. However, in the North SBC sub-region, about four in ten (41%) of residents are 24 years of age or younger (Figure 40).

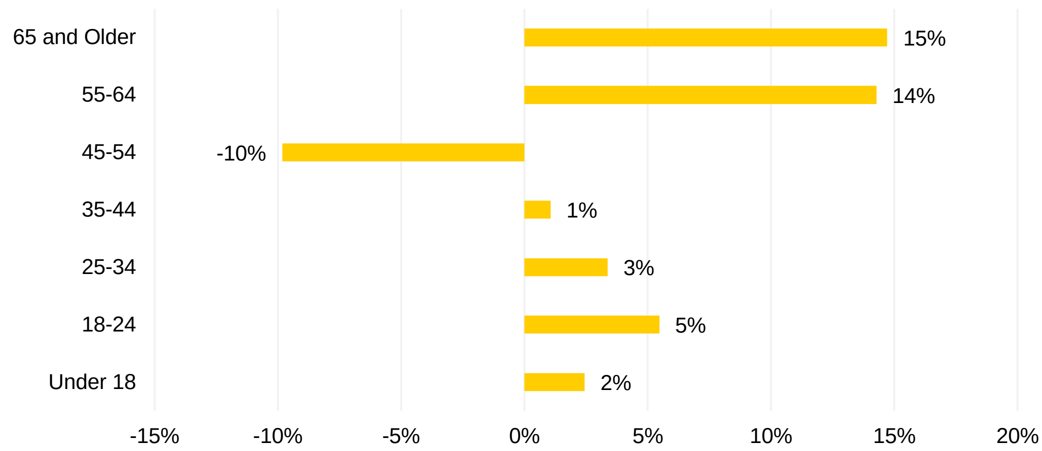
Figure 40. Age Distributions in NSB Sub-Regions (2018)[31]



Older residents (55 years of age and older) have been the fastest-growing population in the NSB region. Younger adults (ages 18-24) have seen modest growth between 2013-2018, increasing by 5% during this time (Figure 41).

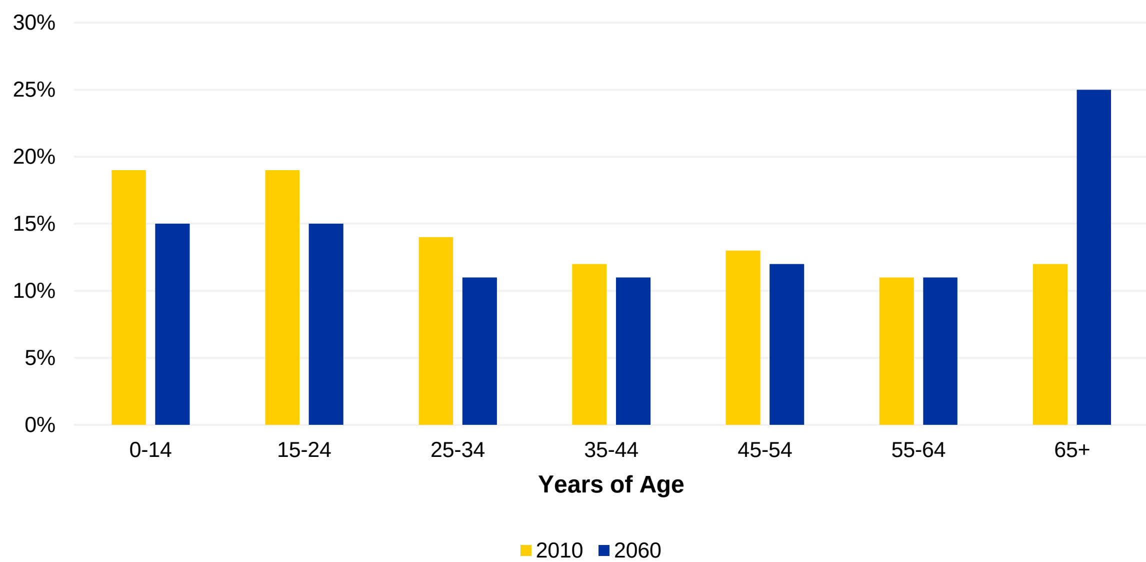
[30] 2018 ACS 5-Year Estimates. United States Census Bureau.
[31] 2018 ACS 5-Year Estimates. United States Census Bureau.

Figure 41. Growth of Population by Age Category (2013-2018)[32]



The Santa Barbara County Association of Governments (SBAG) projects the population to age substantially by 2060. It is projected that residents ages 65 and older will account for 25% of the population by 2060, compared to 12% of the population in 2010. In fact, the 65 and older cohort is the only population expected to increase its share of the overall population between 2010 and 2060 (Figure 42).

Figure 42. SBAG Population Characteristic Projections[33]



Race and Ethnicity

About eight-in-ten (81%) Northern Santa Barbara (NSB) adult residents are White, and the Central SBC sub-region has the greatest non-White population. Additionally, more than four-in-ten (43%) NSB adult residents are Hispanic or Latino. In the North SBC region, the Hispanic and Latino population accounts for nearly six-in-ten adult residents (Figure 43).

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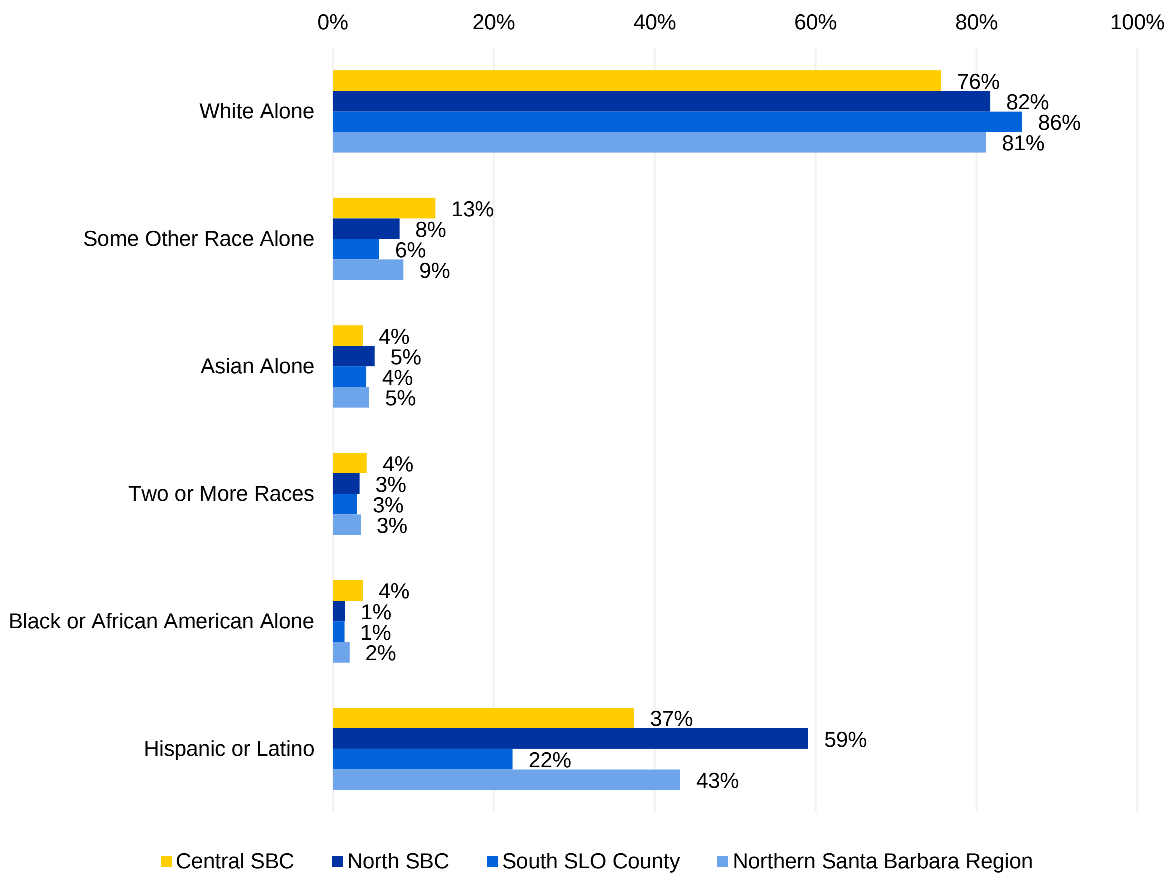
[32] 2013-2018 ACS 5-Year Estimates. United States Census Bureau.

[33] "Regional Growth Forecast 2050 Santa Barbara County" Santa Barbara County Association of Governments. October 2018.

Figure 43. Adult (18+) Population by Race and Ethnicity[34] [35]

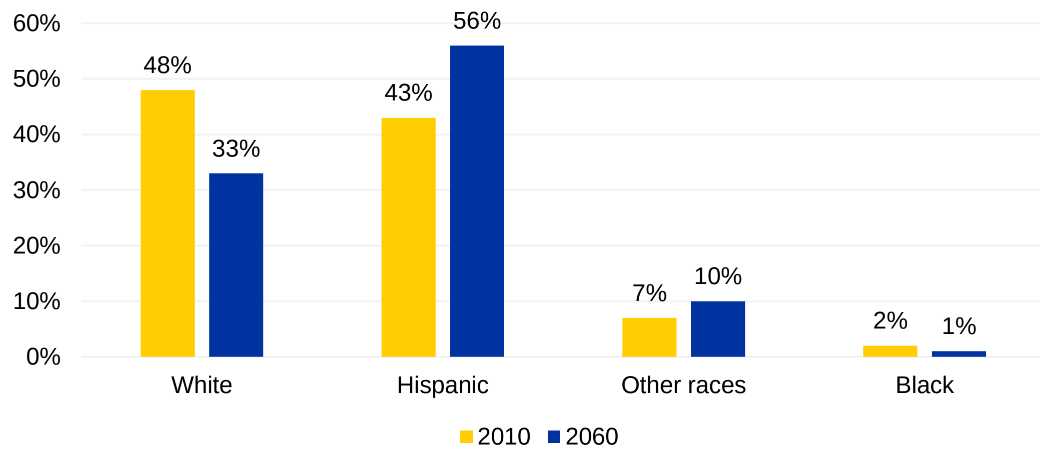


The share of the White population in Santa Barbara County is expected to decline while the proportion of residents who are Hispanic and Other Races is projected to increase. The Santa Barbara County Association of Governments (SBAG) expects Hispanic residents to account for more than half (56%) of the county's population by 2060 (Figure 44).

[34] Note: The Bureau of Labor Statistics measures "Hispanic or Latino" as an ethnicity and not a race. Thus, percentages exceed 100%, as individuals count as a race (White, Asian, etc.) as well as an ethnicity (Hispanic/Latino or not).
Source: 2018 ACS 5-Year Estimates. United States Census Bureau.

[35] Because they account for relatively small shares of the population, the U.S. Census Bureau categories "American Indian and Alaskan Native Alone" and "Native Hawaiian and Other Pacific Islander Alone" are combined with "Some Other Race Alone" under "Some Other Race Alone".

Figure 44. SBAG Population Demographic Projections 2010-2060[36]

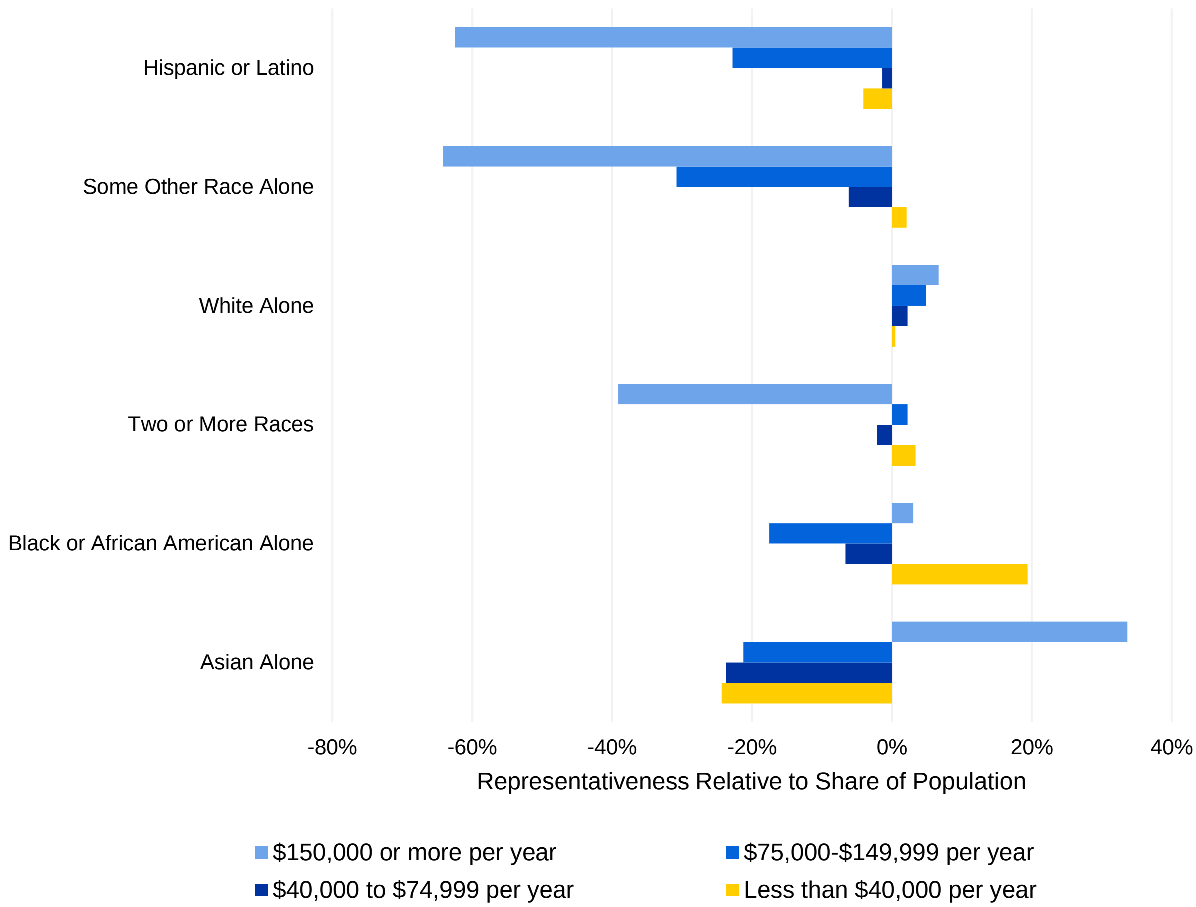


Socioeconomic Analysis

Within the NSB region, Hispanic and Latino, Some Other Race, and Two or More Races households are under-represented among higher-household incomes. For example, Hispanic or Latino residents account for 43% of the adult population, but only 16% of households earning $150,000 or more a year. Conversely, Asian households are over-represented among this highest-income bracket (Figure 45).

[36] Note: These calculations by SBAG are different than the methodology used by the Bureau of Labor Statistics and throughout the remainder of this report.
Source: "Regional Growth Forecast 2050 Santa Barbara County" Santa Barbara County Association of Governments. October 2018.

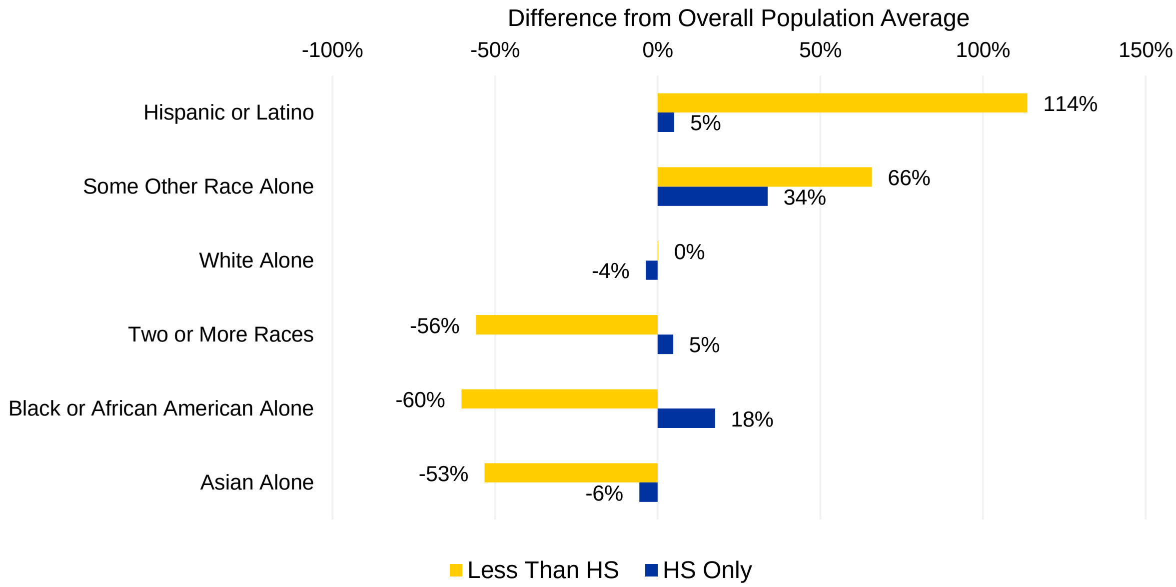
Figure 45. Representativeness Household Income by Race and Ethnicity[37]



Educational attainment rates in the SBCC region vary greatly by race and ethnicity. Figure 46 shows that Hispanic or Latino residents (25 years and older) were more than twice as likely not to have obtained a high school diploma or equivalent relative to the overall population. In contrast, residents who identified as Two or More Races, Black or African American, or Asian, on average, had half the proportion of individuals without a high school diploma or equivalent relative to the overall population. Some Other Race[38] and Black or African-American populations had greater-than-average percentages of those who have obtained only a high school diploma (or equivalent) (Figure 46).

[37] Because they account for relatively small shares of the population, the U.S. Census Bureau categories "American Indian and Alaskan Native Alone" and "Native Hawaiian and Other Pacific Islander Alone" are combined with "Some Other Race Alone" under "Some Other Race Alone".
[38] Because they account for relatively small shares of the population, the U.S. Census Bureau categories "American Indian and Alaskan Native Alone" and "Native Hawaiian and Other Pacific Islander Alone" are combined with "Some Other Race Alone" under "Some Other Race Alone".

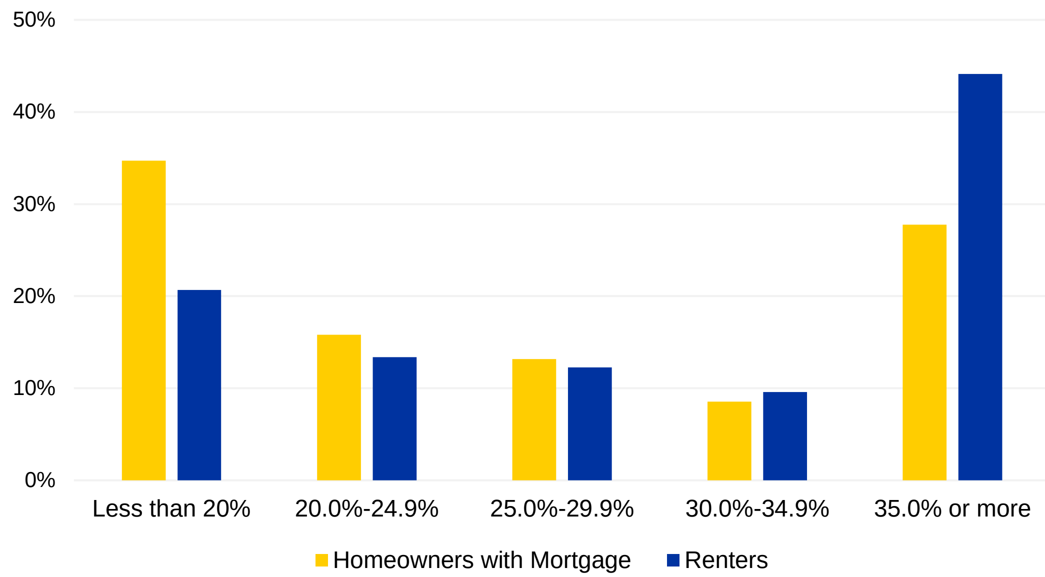
Figure 46. Difference in Educational Attainment from Overall Average (Adults 25+)



Housing

Nearly half (44%) of NSB renters spend 35% or more of their incomes on rent, and three in ten residents rent. Similarly, 28% of homeowners with a mortgage spend 35% or more of their income on their mortgage (Figure 47). This means a notable portion of the population is spending higher portions of their income on housing.

Figure 47. NSB Residents' Share of Income Spent on Housing (2018)[39]



Living Wage

The federal poverty line is based on national averages and therefore does not fully capture the true economic well-being, particularly when regionally dependent factors, such as housing, food, and insurance, are as high as they are in Santa Barbara County and the NSB study region. Researchers at M.I.T. developed the Living Wage calculator, which uses regionally specific costs to determine the "living wage" or the threshold to meet basic needs to circumvent this issue. The NSB study region's living wage is estimated to equate to about $69,311 per year or about $33.32 per hour.[40] This rate is based on a family of four (two children and one working adult). If both parents are working, this living wage will be higher, given the additional costs such as childcare.

[39] 2018 ACS 5-Year Estimates. United States Census Bureau.

[40] This extrapolated from Santa Barbara County results from MIT Living Wage Calculator (https://livingwage.mit.edu/) using NSB regionally-specific data.

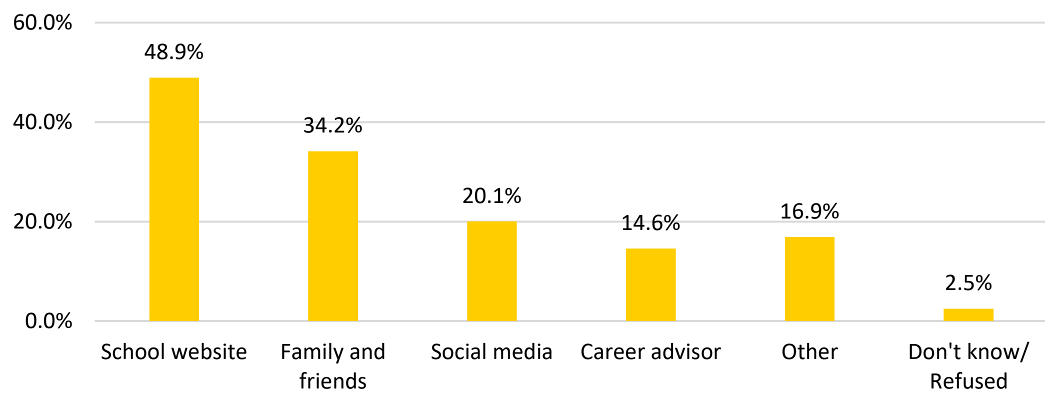
Current and Potential Student Analysis

BW Research conducted a survey of over 230 current and potential in the NSB region between July 27 – September 11, 2020. Respondents were asked an array of questions, including their educational background, employment characteristics, and impacts of the COVID-19 Pandemic. The key findings of this survey are found below, and the survey toplines can be found in Appendix E: Current and Potential Student Survey Toplines. For this analysis, potential students are defined as anyone who is currently not an AHC student.

Education Satisfaction and Awareness

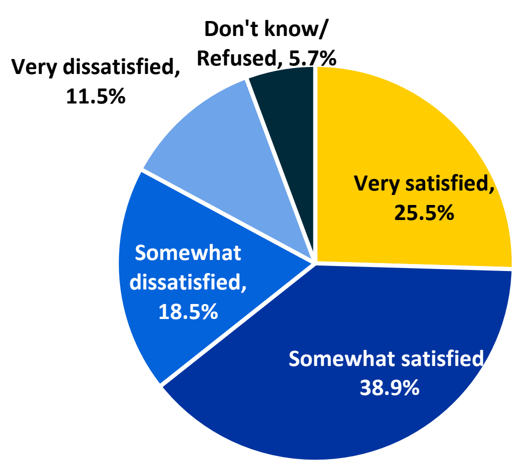
Awareness of Allan Hancock College was high—ninety-four percent of respondents said they have heard of AHC. The school's website was the most common source of awareness, though a third (34%) reported family and friends introducing them to AHC, and another fifth (20%) reported hearing about AHC through social media (Figure 48).

Figure 48. Where Participants had Heard of AHC



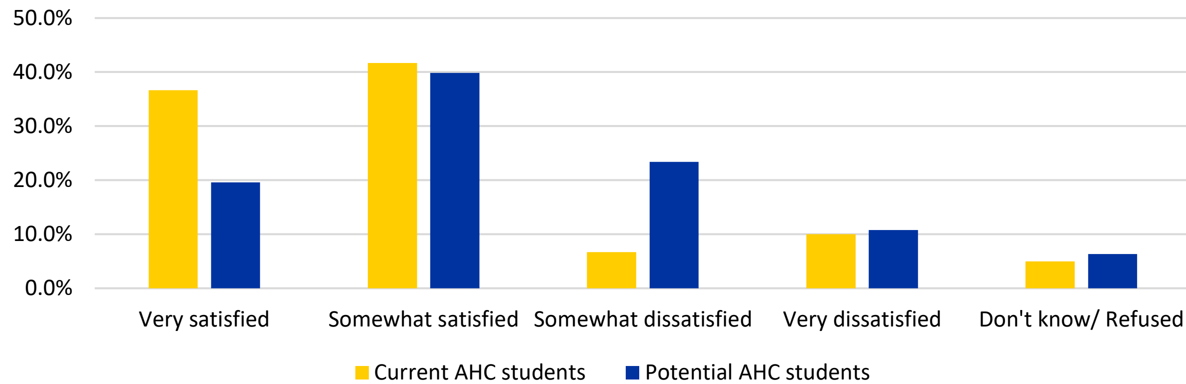
Most respondents are at least 'somewhat satisfied' with their current education and the employment opportunities that the education allows. A quarter (26%) of respondents are 'very satisfied,' and another 39% are 'somewhat satisfied.' Three-in-ten (30%) reported they are at least 'somewhat dissatisfied' (Figure 49).

Figure 49. Satisfaction with Current Education and Employment Opportunities



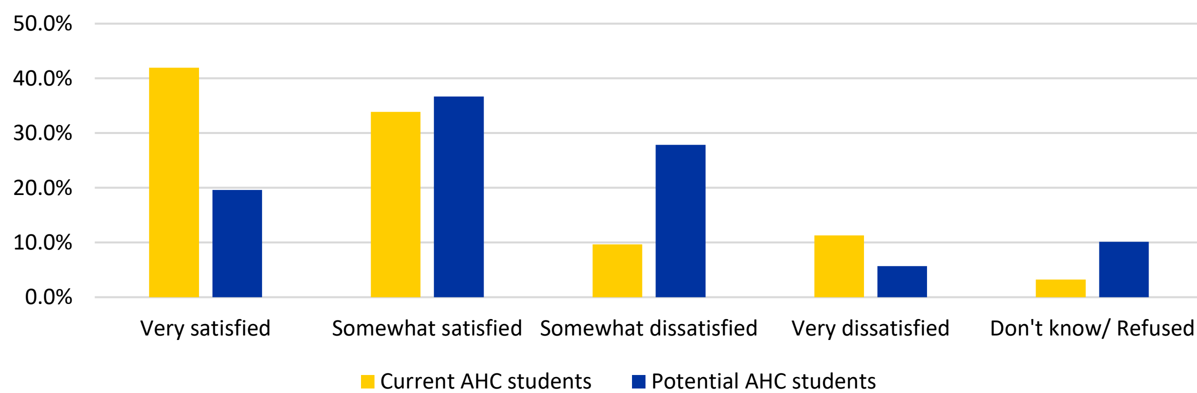
Current AHC students are more likely to be satisfied with their education than potential AHC students.[41] In fact, 37% of current students reported they are 'very satisfied' compared to only 20% of potential AHC students. Only 17% of AHC students reported being at least 'somewhat dissatisfied' with their education level, compared to 34% of potential AHC students (Figure 50).

Figure 50. Satisfaction with Level of Education and Employment Opportunities it Provides



Similarly, current AHC students were more likely to be 'very satisfied' with their career advancement opportunities and wage growth. Forty-two percent of current students reported being 'very satisfied' while only 20% of potential students reported feeling this way. Conversely, only 11% of current AHC students reported being 'somewhat dissatisfied' compared to 28% of potential students (Figure 51).

Figure 51. Satisfaction with Opportunities for Career Advancement and Wage Growth

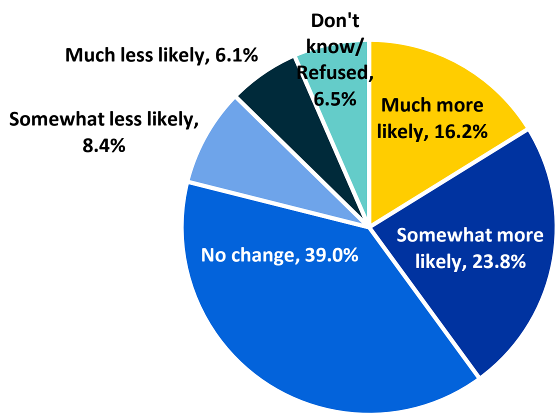


Continuing Education

Current and potential students' interest in continuing education has increased because of the COVID-19 Pandemic. Four-in-ten stated that the Pandemic has made them at least 'somewhat more likely' to continue their education. The same proportion (39%) of respondents reported the Pandemic had not changed their interest in education. Only 14% of respondents reported that the Pandemic has made them 'somewhat less' or 'much less' likely to continue their education (Figure 52).

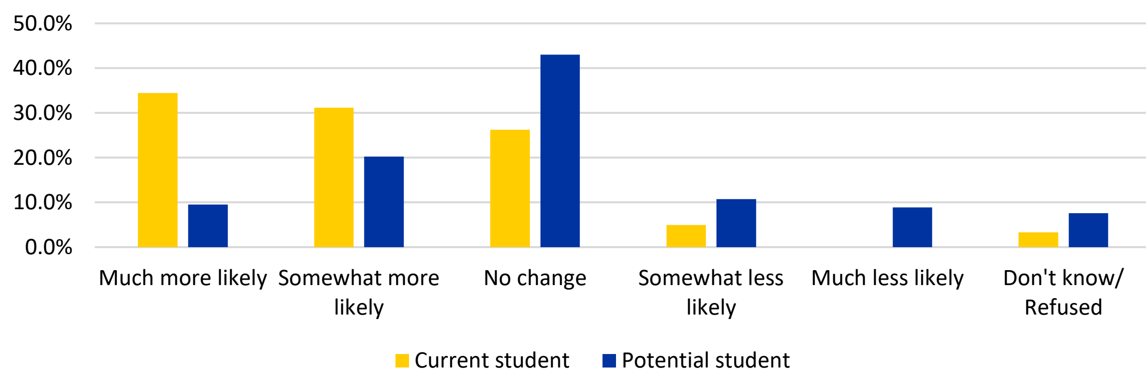
[41] Potential AHC students in this section are defined as any survey respondent who is not currently taking courses at AHC.

Figure 52. Changes in Interest in Continuing Education Because of the COVID-19 Pandemic



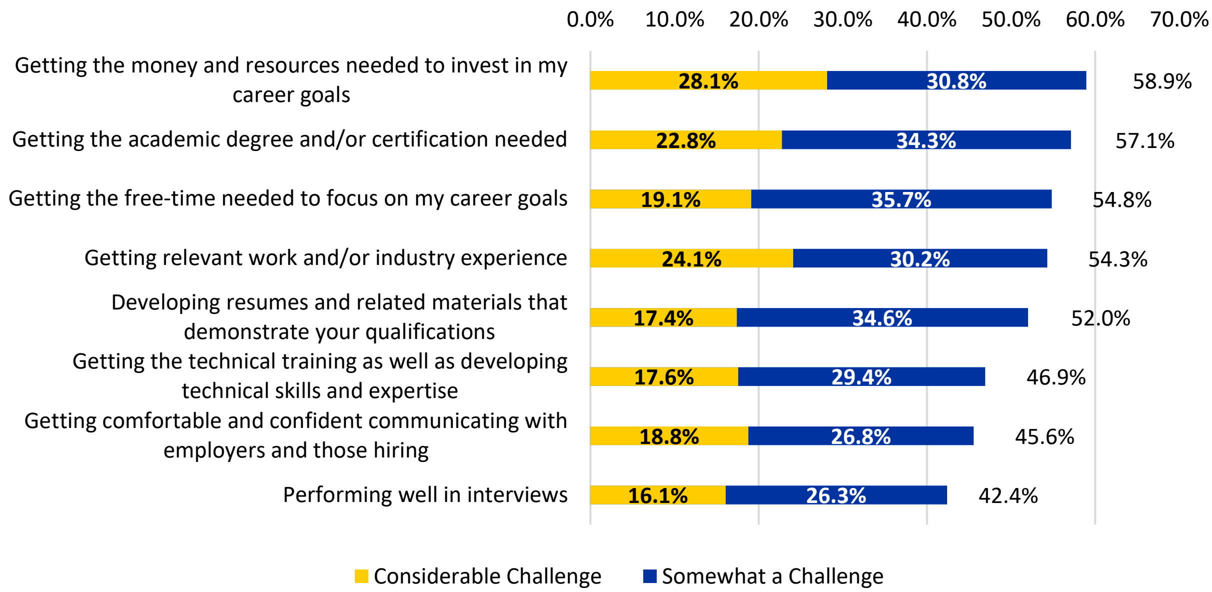
Current students are more likely to continue their education because of COVID-19, while potential students are less likely to change their desire to continue their education. Sixty-six percent of current students reported they are at least somewhat more likely to continue their education because of COVID-19, and only 5% reported they are less likely (Figure 53).

Figure 53. Change in Interest in Continuing Education Because of the COVID-19 Pandemic



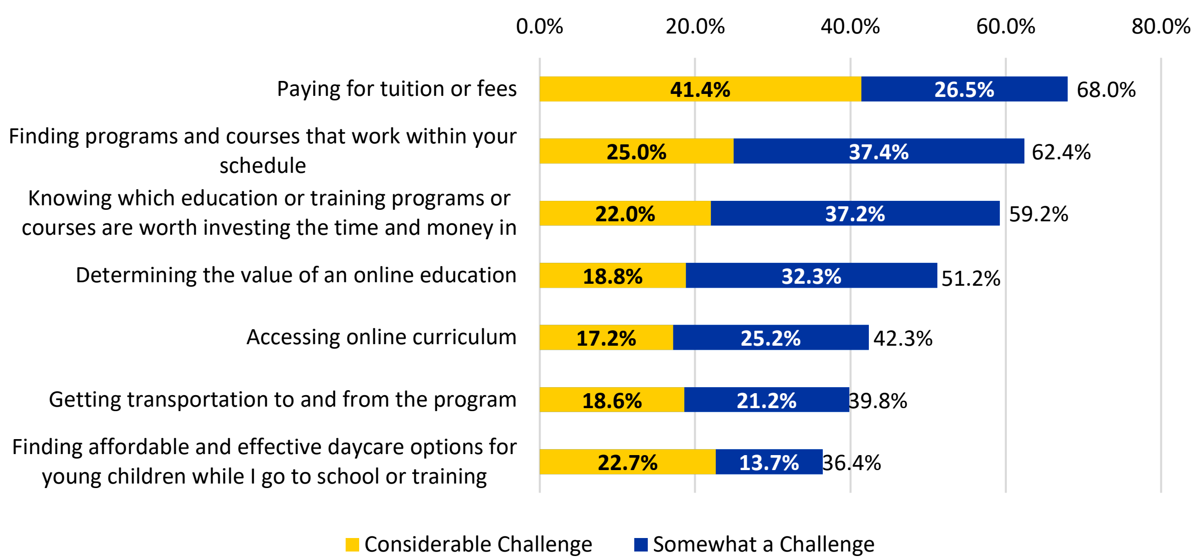
Getting a degree or certificate and getting the money for those credentials are the two most commonly cited obstacles preventing respondents from getting employed in their career of choice. Nearly six-in-ten (59%) reported that getting money to invest in their career goals was at least 'somewhat a challenge.' This was also the response that respondents most often reported as a 'considerable challenge' (28%) (Figure 54).

Figure 54. Greatest Obstacles in Getting Employed in Career of Choice



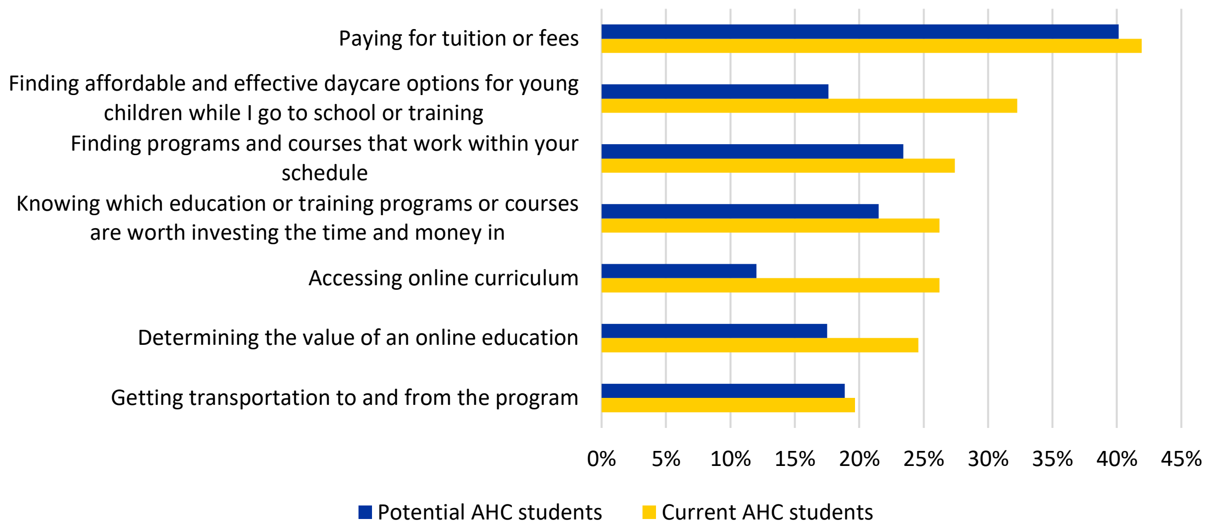
Paying for education is at least a challenge for more than two-thirds of respondents (68%). In fact, 41% said this was a 'considerable challenge.' Additionally, managing schedules (62%) and knowing which programs are worth investing in (60%) are substantial barriers as well. It is also notable that about half (51%) of respondents said that determining the value of online education was at least 'a challenge' (Figure 55).

Figure 55. Obstacles to Getting the Education or Training Desired



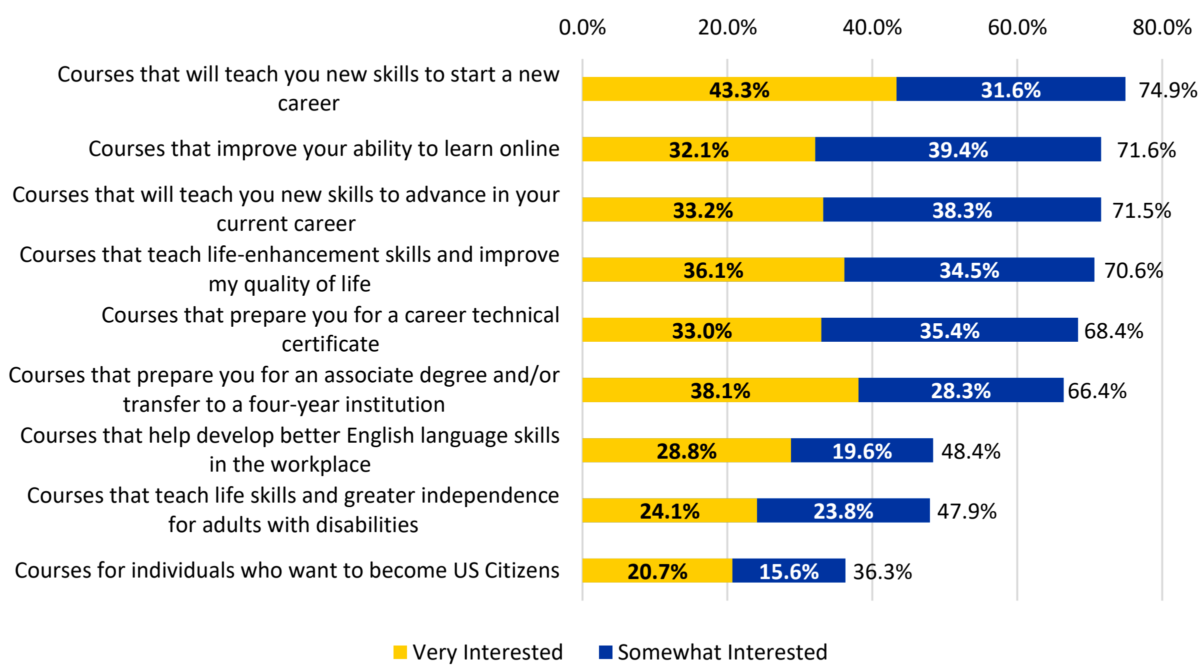
Current AHC students face some obstacles to education that are different than those faced by potential students. While paying tuition and fees remains the primary 'considerable challenge' for both populations, a third (32%) of current AHC students stated that finding affordable and effective daycare options was a 'considerable challenge.' It is also notable that a quarter (26%) of current students think accessing online curriculum is a 'considerable challenge,' and another 25% think that determining the value of online education is a considerable challenge (Figure 56).

Figure 56. 'Considerable Challenges' to Desired Education by Current & Potential Student



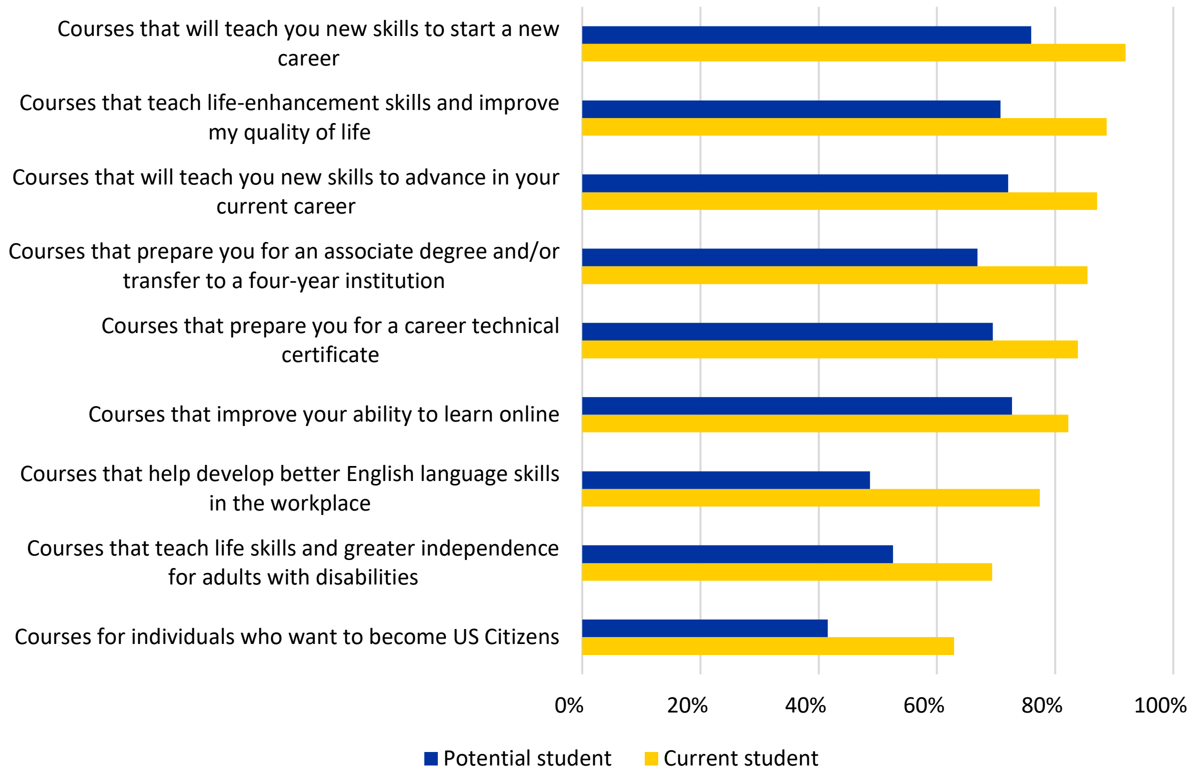
Six of the nine courses tested received interest from two-thirds or more of respondents. Courses that teach new skills to start a new career received the most interest, with 43% reporting they are 'very interested' and another 32% reporting they are 'somewhat interested.'

Figure 57. Courses Respondents are Most Interested in



Current students are most interested in courses that will allow them to start new careers, improve their quality of life, and advance their careers. The interests of potential students are similar, though differ slightly. Courses that teach new skills to start a new career are the most sought after, but 73% of respondents reported they were 'very' or 'somewhat interested' in courses that improve [their] ability to learn online (Figure 58). This suggests that courses that improve online learning may receive strong interest, from current and potential students alike.

Figure 58. Courses Current and Potential Students are Most Interested[42] in



[42] This includes 'very interested' and 'somewhat interested' responses.

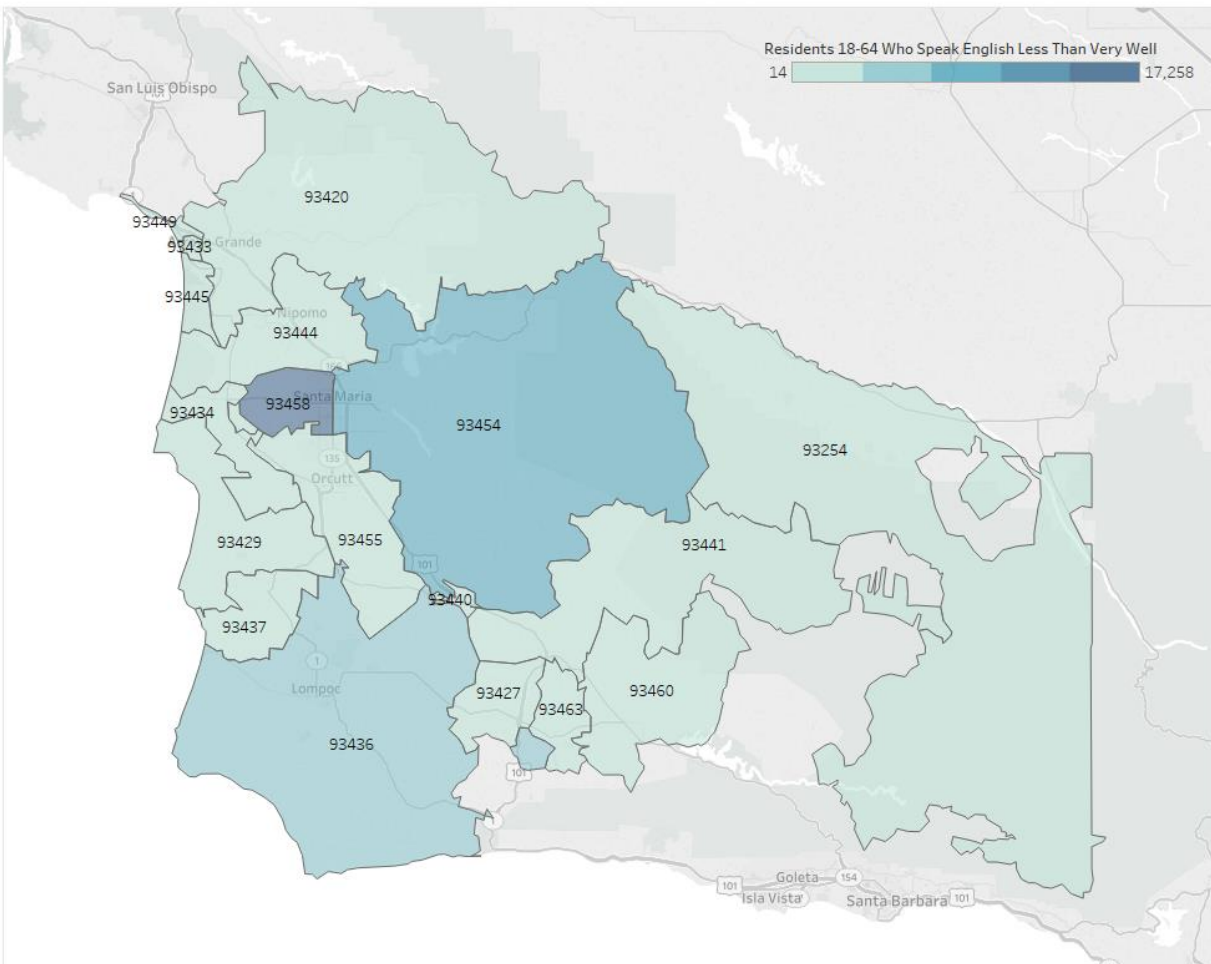
Potential Students

This section identifies key populations that meet the basic criteria for the student populations indicated. While focusing on these demographics casts a wide net, these figures provide an overall perspective of the region that is useful in understanding where these populations reside and the scale of the local potential student population.

English Second Language Students

More than 42,000 residents between the ages of 18-64 in the NSB region speak English "less than very well." These residents are most concentrated among zip codes in the North SBC sub-region; the zip code 93458 (Santa Maria) has 17,200 residents who speak English less than very well (Figure 59).

Figure 59. Potential ESL Students by Zip Code (2018)[43]



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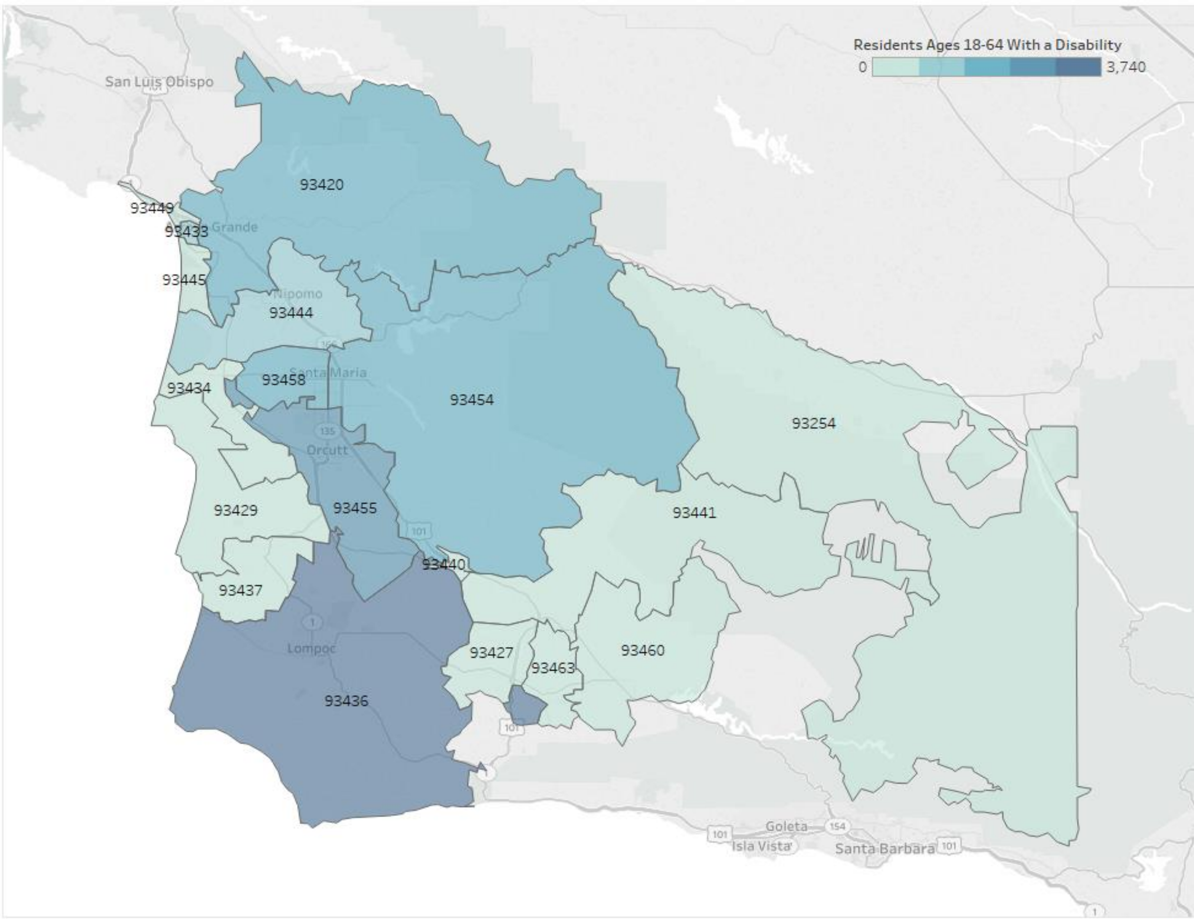
43 2018 ACS 5-Year Estimates. United States Census Bureau.

Students with Disabilities

Across the NSB region, there are 15,600 adults with disabilities. These residents, between the ages of 18 and 64, are most concentrated in the North SBC sub-region, though both the Central SBC and South SLO County sub-region have more than 4,100 residents with disabilities (Figure 60).

Figure 60. Adult Residents (Ages 18-64) With Disabilities (2018)[44]

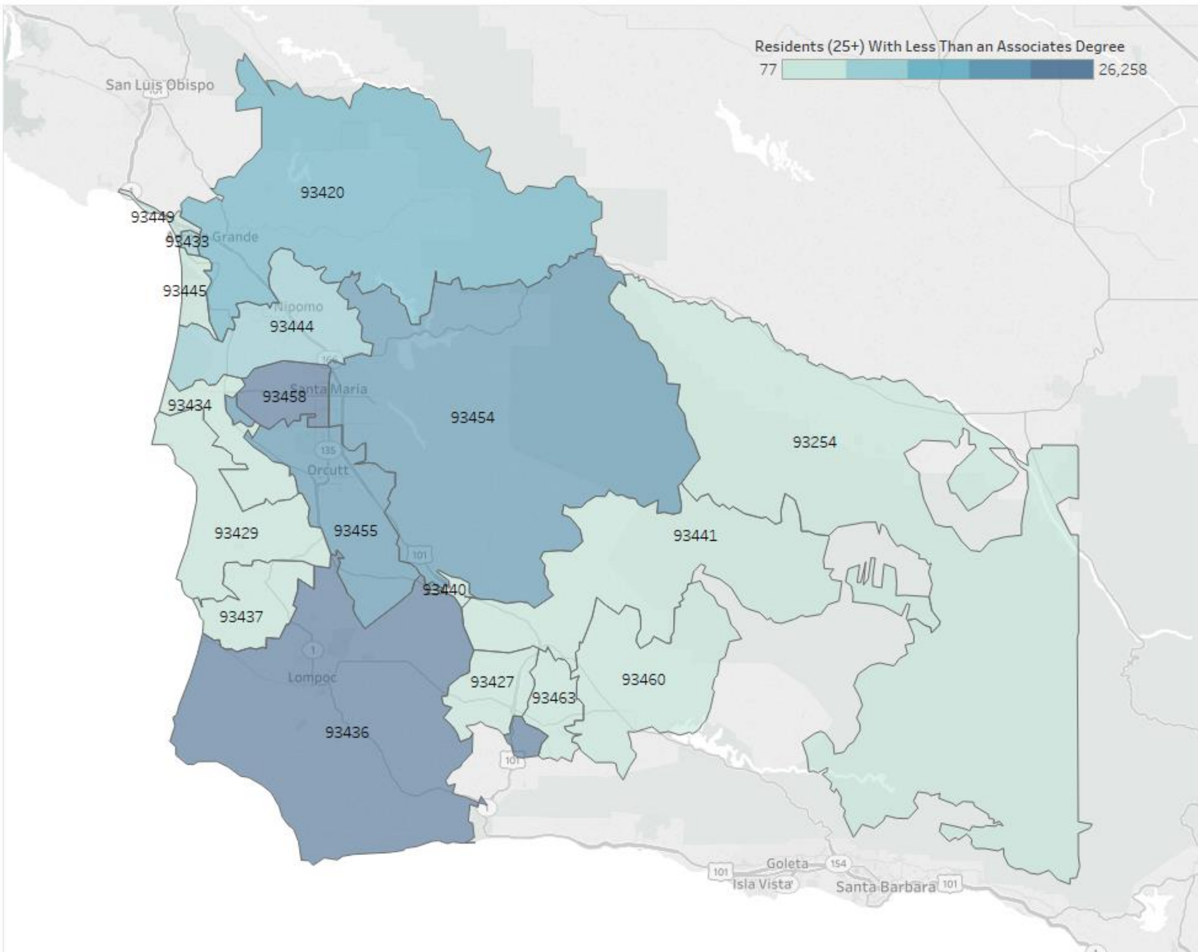


[44] 2018 ACS 5-Year Estimates. United States Census Bureau.

Potential Students

There are nearly 135,000 adult residents with less than an associate degree in the NSB region. Most of these residents are concentrated in the zip codes surrounding Lompoc (93436), Santa Maria (93458 & 93454), and Orcutt (93455). These four zip codes have more than 88,000 residents who meet these criteria (Figure 61) and represent substantial populations of potential students.

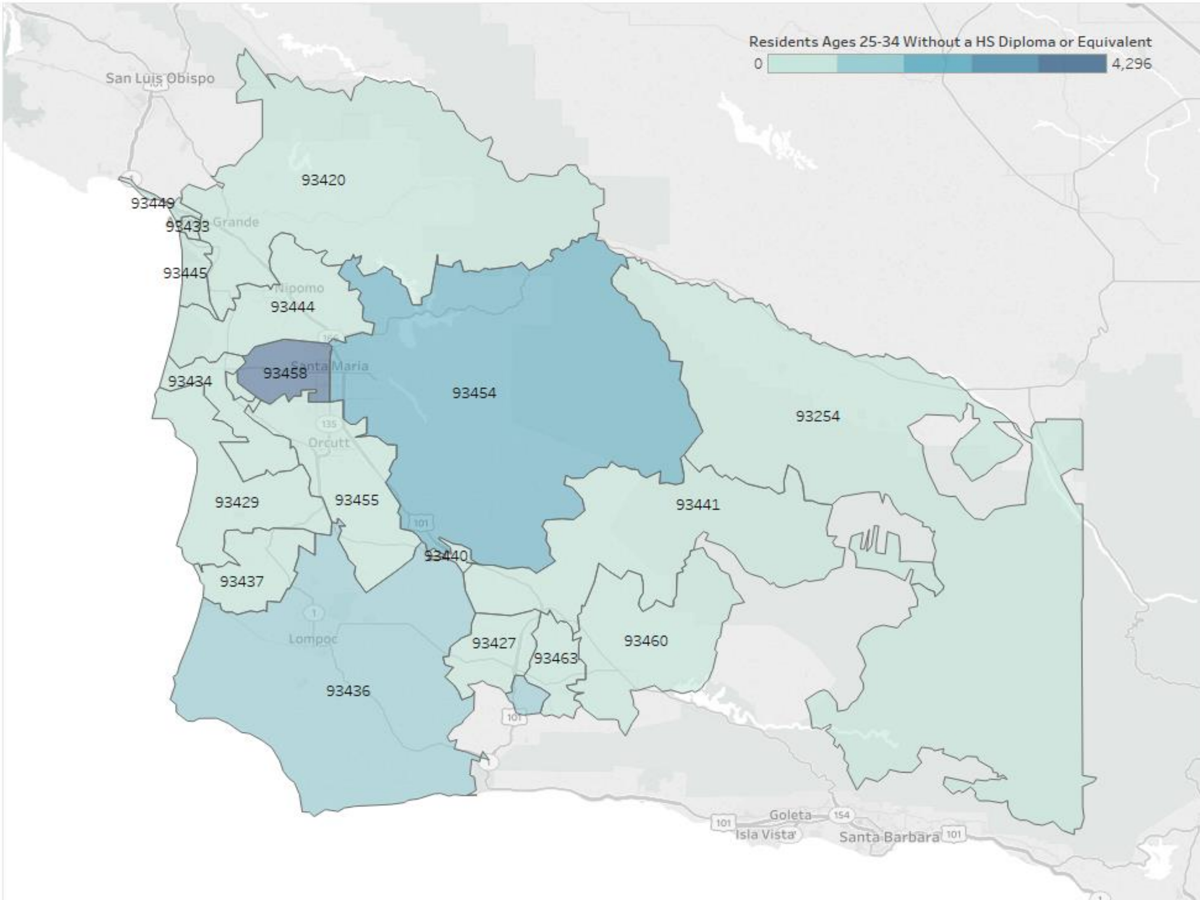
Figure 61. Residents Ages 25 or Older with Less than an Associate Degree



Younger Potential Basic Skills Students

There are nearly 10,000 residents between the ages of 25 and 34 who do not have a High School Diploma or equivalent. Three-quarters (7,504) of these residents are concentrated in the North SBC region. The zip codes 93458 and 93454, near Santa Maria, have the greatest populations (Figure 62).

Figure 62. Younger Potential Basic Skills Students (Ages 25-34)[45]

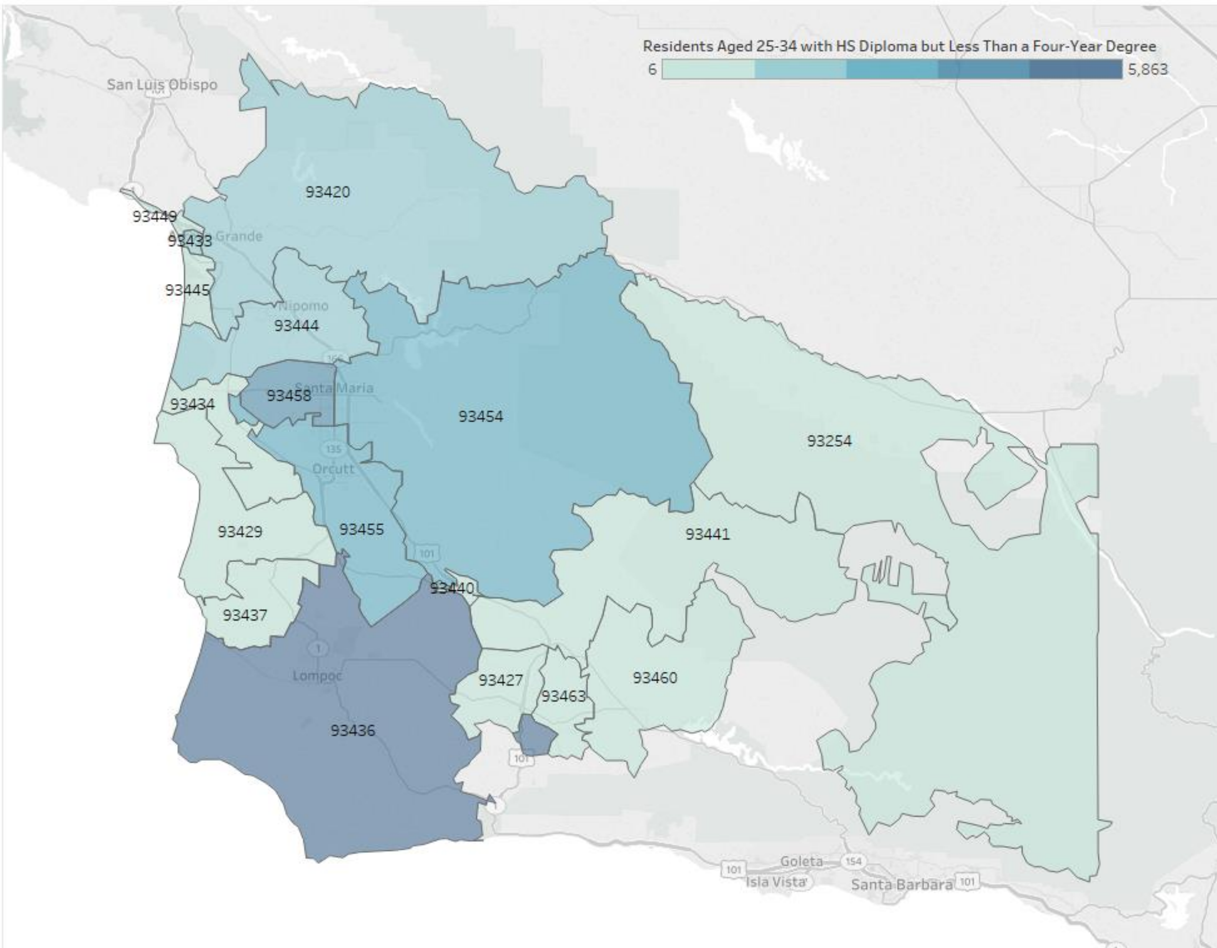


[45] 2018 ACS 5-Year Estimates. United States Census Bureau.

Younger Potential CTE Students

More than 23,600 residents ages 25 to 34 have a high school diploma but do not have a four-year degree. Most of these residents—who may have a high school diploma, GED, some college but no degree, or an associate's degree—live between Santa Maria, Orcutt, and Lompoc (Figure 63).

Figure 63. Younger Potential CTE Students (Ages 25-34)[46]

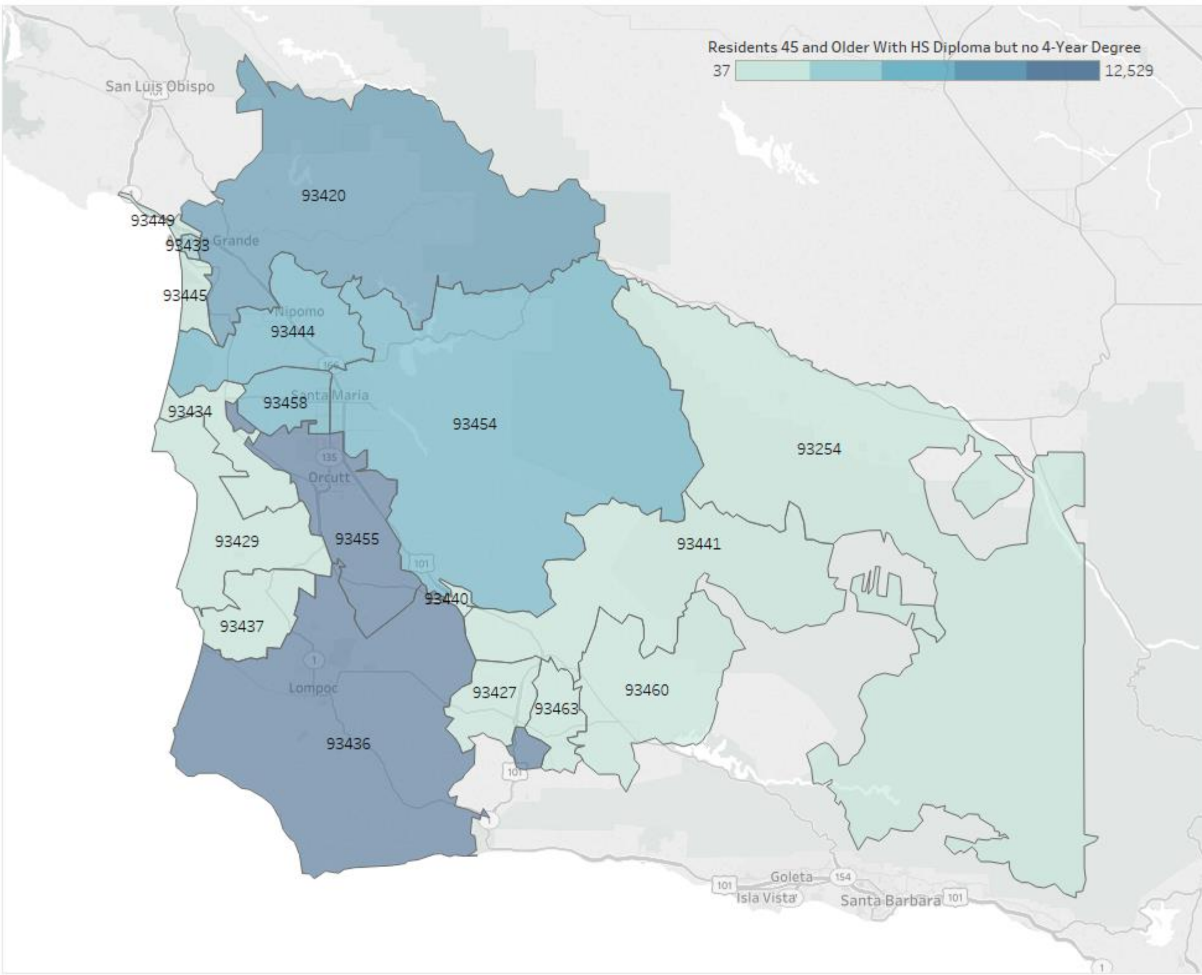


[46] 2018 ACS 5-Year Estimates. United States Census Bureau.

Older Potential CTE Students

There are nearly 42,000 residents ages 45 and older who have a high school diploma but do not have a four-year degree. In fact, in the two zip codes 93455 and 93436 (Orcutt and Lompoc) combined have more than 24,800 residents who meet these criteria (Figure 64).

Figure 64. Older Potential CTE Students (Ages 45 and Older)[47]

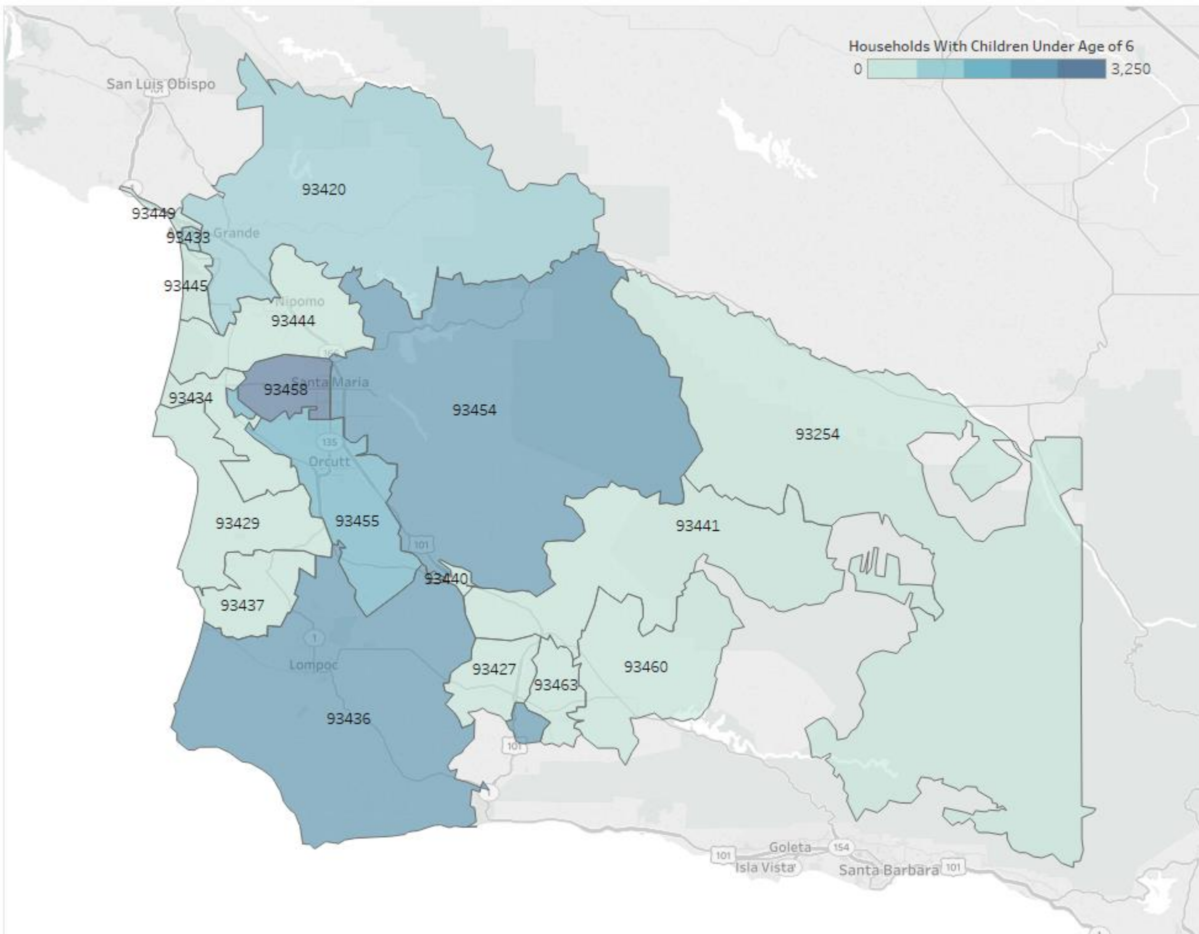


[47] 2018 ACS 5-Year Estimates. United States Census Bureau.

Parents with Young Children

There are about 14,000 families across the NSB region that have children under the age of six. Greatest concentrations generally align with areas that have the largest populations (Figure 65). These parents would require substantial flexibility or assistance with childcare should they seek to further their education.

Figure 65. Households with Children Under the Age of Six (2018)[48]



[48] 2018 ACS 5-Year Estimates. United States Census Bureau.

Appendix A: Data Sources and Methodology

Methodology
Through an iterative process, BW Research worked closely with Allan Hancock College to develop a survey instruments that met all the research objectives of the study. In developing the instruments, BW Research utilized techniques to overcome known biases in survey research and minimize potential sources of measurement error within the survey. Below are descriptions of the methodology for each survey that was implemented.

Employer Survey Methodology

The survey sample for the project included businesses across multiple industries within North Santa Barbara and South San Luis Obispo counties (26 zip codes) with contact information (either phone or email) from DatabaseUSA.
The table below provides an overview of the survey methodology utilized for this project.

Method	Web and Telephone Survey
Universe	11,074 Total Employers in North Santa Barbara and South San Luis Obispo Counties[49]
Number of Respondents	101 Employers Responded
Median Length	9.41 minutes
Field Dates	July 7, 2020 to August 13, 2020
Margin of Error	The margin of error for questions answered by all 101 respondents ranged from +/-5.82% to +/-9.71% (95% level of confidence)

The overall margin of error for the study, at the 95 percent level of confidence, is between +/-5.82% and +/-9.23 percent for questions answered by all 101 respondents.

Potential and Current Student Survey Methodology
The survey sample was provided through a third party and included residents between the ages of 18 and 64 in North Santa Barbara and South San Luis Obispo counties (26 zip codes), with an oversample of 18 to 29-year olds and "less than college" educational attainment where available.

Method	Web and Telephone Survey
Universe	185,481 Total Residents Between the Ages of 18 and 64 in in North Santa Barbara and South San Luis Obispo Counties50
Number of Respondents	234 Current and Potential Students Responded
Median Length	7.75 minutes
Field Dates	July 27, 2020 to September 10, 2020
Margin of Error	The margin of error for questions answered by all 234 respondents ranged from +/-3.84% to +/-6.40% (95% level of confidence)

[49] DatabaseUSA
[50] American Community Survey (ACS) 2018 5-year Estimates

The overall margin of error for the study, at the 95 percent level of confidence, is between +/- 3.84% to +/-6.40% percent for questions answered by all 234 respondents.

Secondary Research

Population, demographic, poverty figures at the zip code level were obtained from the U.S. Census Bureau, 2013-2018 American Community Survey 5-Year Estimates.

BW Research utilized EMSI for employment and regional education completion figures. EMSI updates data quarterly. The 2020.2 dataset was used for this report.

Appendix B: Definitions

Unemployment Sub-Region Definitions

CENTRAL SBC	NORTH SBC	SOUTH SLO COUNTY
Buellton city	Guadalupe city	Arroyo Grande city
Lompoc city	Mission Hills CDP	Grover Beach city
Los Alamos CDP	Orcutt CDP	Nipomo CDP
Santa Ynez CDP	Santa Maria city	Oceano CDP
Solvang city		Pismo Beach city
Vandenberg AFB CDP		
Vandenberg Village CDP		

Appendix C: Data Tables

Industry Clusters

Industry Cluster	2019 Jobs	% Change in Jobs 204-2019	2019 Location Quotient	Average Earnings Per Job
Agriculture and Food	25,281	13%	8.21	$46,646
Public Services and Infrastructure	12,697	-4%	1.18	$104,473
Tourism, Hospitality, and Recreation	14,610	15%	1.06	$28,770
Retail	11,944	-5%	0.94	$42,068
Building and Design	6,794	19%	0.94	$78,022
Education and Knowledge Creation	11,239	11%	0.87	$69,320
Healthcare	13,229	17%	0.86	$74,903
Biotechnology and Biomedical Devices (B&BD)	1,374	27%	0.83	$90,185
Other Services	4,386	-8%	0.82	$42,178
Defense, Aerospace, and Transportation Manufacturing (DATM)	1,400	1%	0.77	$108,560
Logistics	3,158	13%	0.55	$70,488
Finance, Banking, Insurance, and Real Estate (FIRE)	2,884	9%	0.45	$83,979
Professional and Business Services	5,320	-11%	0.44	$55,300
Information and Communications	564	-17%	0.41	$57,159
Other Manufacturing	1,636	-5%	0.37	$75,383
Information and Communications Technology (ICT)	736	9%	0.20	$124,281

Appendix D: Employer Survey Toplines

North Santa Barbara AHC
Preliminary Employer Survey Toplines
August 2020
n = 101

North Santa Barbara – Allan Hancock College
Preliminary Employer Survey Toplines

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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 **Allan Hancock College** (AHC) who would value your participation in a brief survey about the region's talent.

**(If needed):** This survey has been commissioned by the AHC, 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 AHC develops innovative strategies that help students achieve their educational and economic goals.

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Section 1. 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?)

100.0%	Yes, I am involved in staffing or hiring decisions at my firm
0.0%	I can connect you to the appropriate person
0.0%	No
0.0%	Not sure

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

100.0%	Yes
0.0%	No
0.0%	Not sure

C. At the start of 2020 (Before COVID-19), did your business location have two or more employees (including yourself)?

100.0%	Yes
0.0%	No

Section 2. Firm Profile & Hiring Expectations

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 yourself and all full-time and part-time employees, how many **permanent** employees currently work at your location? [DO NOT ACCEPT 0 AS A RESPONSE] [IF NEEDED: THIS DOES NOT INCLUDE ANY WORKERS FURLOUGHED DUE TO COVID-19 – WE WILL ASK ABOUT THOSE EMPLOYEES LATER IN THE SURVEY]

92.8%	Number of permanent employees:
7.2%	We have shut down due to COVID-19 and have not reopened
0.0%	Don't know/ Refused

Number of Employees

54.4	Average
11	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?

23.3%	More (enter number)
7.8%	Fewer (enter number)

64.4%	Same number of permanent employees
4.4%	Don't know/ Refused

More Employees

7.9	Average
5	Median

Fewer Employees

7.2	Average
6	Median

[If amount differs by 10% or more in either direction, ask:]

Just to confirm, you currently have ____ **permanent** employees and you expect to have _____ (more/fewer) employees, for a total of ____ **permanent** employees 12 months from now.

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

31.1%	Number of temporary employees
3.3%	Don't know/ Refused
65.6%	No temporary employees

Number of Temporary Employees

15.1	Average
4	Median

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

17.5%	Agriculture and Food Production
11.3%	Finance, Business, Insurance, or Real Estate
8.2%	Building or Construction
7.2%	Healthcare (including Dental)
7.2%	Architecture, Design, or Engineering
7.2%	Technology or Information & Communication Technologies
7.2%	Tourism, Recreation, and Hospitality
7.2%	Manufacturing
6.2%	Professional and Business Services
5.2%	Automotive Technology
3.1%	Education and Childcare Services
3.1%	Human Services (including Addiction Treatment and Family Service Workers)
2.1%	Criminal Justice and Fire Technology
1.0%	Biotechnology & Biomedical Devices

1.0%	Arts, Media, and Fashion
14.4%	Other (please specify)

Section 3. COVID-19 Profile

Next, I want to ask a few questions about how COVID-19 or the New Coronavirus has impacted your business?

5. Has COVID-19 had a negative impact on your business?

8.2%	No, COVID-19 has had little to no impact on my business
63.9%	Somewhat, COVID-19 has had some negative impacts on my business
20.6%	Yes, COVID-19 shut down my business, but I have since reopened
7.2%	Yes, COVID-19 shut down my business, and I have not reopened
0.0%	Don't know/ Refused

6. Do you have any furloughed employees that you expect to bring back as the region reopens? If yes, how many employees do you expect to bring back? [IF NEEDED: This would just be for your current location.]

73.2%	No, we did not furlough any of our employees
14.4%	Yes, we furloughed employees but do not expect to bring them back
12.4%	Yes, we expect to bring back [enter number] of furloughed employees as the region reopens

7. When do you expect your business to fully recover from the impacts of COVID-19?

21.6%	Our business has already fully recovered
34.0%	Sometime in the next few months, as people get back to work and out of the house
27.8%	Not until we have a vaccine or treatment for COVID-19 and everyone feels safe again
1.0%	Never, COVID-19 will have a permanent impact on our business
14.4%	Not sure when my business will fully recover
1.0%	Don't know/ Refused

Section 4. General Hiring Profile

Next, I would like to ask you about your general talent and hiring needs.

8. 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.

22.7%	Very difficult
50.5%	Somewhat difficult
18.6%	Not at all difficult
8.2%	Don't know/ Refused

[IF SELECTED '1' OR '2' AT Q8, ASK Q9, OTHERWISE SKIP]

9. What are the two biggest reasons for the hiring difficulty of entry-level applicants? [ALLOW UP TO TWO RESPONSES] (n = 71)

RANDOMIZE

46.5%	Lack of experience/industry-specific knowledge
38.0%	Inadequate non-technical or soft-skills
29.6%	Lack of technical skills expertise
25.4%	Small applicant pool
11.3%	Inadequate educational attainment or certifications
9.9%	Other (see verbatim responses)
1.4%	Don't know/ Refused

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

29.9%	Very difficult
46.4%	Somewhat difficult
12.4%	Not at all difficult
11.3%	Don't know/ Refused

[IF SELECTED '1' OR '2' AT Q10, ASK Q 11, OTHERWISE SKIP]

11. What are the two biggest reasons for the reported hiring difficulty of non-entry-level/experienced applicants? [ALLOW UP TO TWO RESPONSES] (n = 74)

RANDOMIZE

52.7%	Lack of experience/industry-specific knowledge
29.7%	Lack of technical skills/expertise
28.4%	Small applicant pool

20.3%	Inadequate non-technical or soft skills
13.5%	Inadequate educational attainment or certifications
9.5%	Other (see verbatim responses)
1.4%	Don't know/ Refused

12. 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?

39.2%	Promote from within
44.3%	Even split (50-50 promote from within & recruit from outside)
15.5%	Recruit from outside
1.0%	Don't know/ Refused

13. How often does your business recruit individuals from outside of Northern Santa Barbara County (IF NEEDED: This is the area from Arroyo Grande to Las Cruces and Santa Ynez)?

6.3%	Always or Almost Always (75%-100% of the time)
17.7%	Frequently (50%-74% of the time)
31.3%	Sometimes (25%-49% of the time)
26.0%	Rarely (1% to 24% of the time)
17.7%	Never (0% of the time)
1.0%	Don't know/ Refused

14. Are there any occupations that you are having difficulty finding qualified applicants for?

38.5%	Yes (please specify)
57.3%	No
4.2%	Don't know/ Refused

Specify Answers

8.1%	Line cook
8.1%	Clerical/office roles
8.1%	Marketing
5.4%	Licensed sales/insurance agent
70.3%	Other (see verbatim responses)

Section 5. Certifications & Skills

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

15. Are there any occupations your firm hires that requires or prefers specific credentials or certifications?

16.8%	Yes, we require successful applicants to have (see verbatim responses)
8.4%	Yes, we prefer successful applicants to have (see verbatim responses)
68.4%	No
6.3%	Don't know/ Refused

16. How **important** are each of the following for positions that require less than a four-year degree (Very important, Somewhat Important, Not too important, DK/NA [DON'T READ]):

	Very Important	Somewhat Important	Not Important	Don't know/ Refused
Technical skills	42.1%	43.2%	14.7%	0.0%
Problem-solving and critical thinking skills	56.8%	34.7%	8.4%	0.0%
Social and verbal communication skills	65.3%	23.2%	10.5%	1.1%
Industry-specific knowledge	31.6%	51.6%	15.8%	1.1%
Educational degrees and certifications	16.8%	41.1%	41.1%	1.1%

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 Difficult	Don't know/ Refused
Technical skills	25.5%	50.0%	22.3%	2.1%
Problem-solving and critical thinking skills	31.9%	48.9%	18.1%	1.1%
Social and verbal communication skills	26.6%	55.3%	17.0%	1.1%
Industry-specific knowledge	27.7%	53.2%	18.1%	1.1%
Educational degrees and certifications	12.8%	46.8%	27.7%	12.8%

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

13.8%	Communication/Interpersonal Skills
7.4%	Critical Thinking/ Problem Solving
7.4%	Motivation/Work Ethic
5.3%	Experience/ Industry Knowledge
4.6%	Teamwork/ Cooperation

3.5%	Computer Skills
1.4%	Written skills
56.4%	Other

19. 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/ Refused
Ability to work effectively on a team	69.1%	19.1%	10.6%	1.1%
Self-motivation and ability to work independently	66.0%	22.3%	11.7%	0.0%
Adaptability and flexibility	53.2%	35.1%	11.7%	0.0%
Critical thinking	53.2%	33.0%	12.8%	1.1%
People and customer service skills	52.1%	33.0%	13.8%	1.1%
Leadership and decision-making	44.7%	30.9%	22.3%	2.1%
Cultural competence	43.6%	31.9%	24.5%	0.0%
Spanish speaking ability	21.3%	47.9%	27.7%	3.2%
Technical writing skills	29.8%	40.4%	28.7%	1.1%
Ability to use basic algebra	11.7%	36.2%	47.9%	4.3%

20. 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.

RANDOMIZE

	Great Interest	Some Interest	Little to No Interest	Don't know/ Refused
An apprenticeship-type program for your future employees	23.4%	45.7%	28.7%	2.1%
Courses that teach Microsoft Excel including the ability to organize, summarize, and visualize data	24.5%	35.1%	39.4%	1.1%
Sourcing and pre-screening for interns	13.8%	37.2%	45.7%	3.2%
Courses that teach entry-level computer programming or coding	17.0%	27.7%	54.3%	1.1%
Other (see verbatim responses)	45.0%	5.0%	15.0%	35.0%

[Skip Pattern Based on Previous Industry Question]

1. Healthcare (including Dental) (n = 5)

	Great Interest	Some Interest	Little to No Interest	Don't know/ Refused
Medical Billing and Coding	20.0%	40.0%	40.0%	0.0%
Restorative Aide	20.0%	60.0%	20.0%	0.0%
Ethics	40.0%	40.0%	20.0%	0.0%
Rules and Regulations	0.0%	100.0%	0.0%	0.0%
Emergency Response	40.0%	40.0%	20.0%	0.0%

2. Building or Construction (n = 8)

	Great Interest	Some Interest	Little to No Interest	Don't know/ Refused
Trainings that provide an OSHA certification	25.0%	50.0%	25.0%	0.0%
Trainings that provide welding experience	25.0%	12.5%	62.5%	0.0%
Trainings that provide Hazardous Materials Site certificates	25.0%	37.5%	37.5%	0.0%

3. Architecture, Design, or Engineering (n = 6)

	Great Interest	Some Interest	Little to No Interest	Don't know/ Refused
Trainings that provide experience in Mechatronics	0.0%	0.0%	83.3%	16.7%
Trainings that provide experience in drafting	16.7%	66.7%	16.7%	0.0%

4. Finance, Business, Insurance, or Real Estate (n = 10)

	Great Interest	Some Interest	Little to No Interest	Don't know/ Refused
Trainings that provide experience in QuickBooks	10.0%	50.0%	40.0%	0.0%
Trainings that provide experience in advanced spreadsheet skills	10.0%	30.0%	60.0%	0.0%

5. Technology or Information & Communication Technologies (n = 7)

	Great Interest	Some Interest	Little to No Interest	Don't know/ Refused
Trainings that provide web management experience	14.3%	57.1%	28.6%	0.0%
Trainings that provide experience with IT security	42.9%	28.6%	28.6%	0.0%
Trainings that provide experience with networks	28.6%	28.6%	42.9%	0.0%
Trainings that provide experience with software development	28.6%	42.9%	28.6%	0.0%
Trainings that provide experience with cloud computing	28.6%	57.1%	14.3%	0.0%

Trainings that provide experience with building web applications	42.9%	28.6%	28.6%	0.0%

6. Manufacturing (n = 7)

	Great Interest	Some Interest	Little to No Interest	Don't know/ Refused
Trainings that provide welding experience	28.6%	42.9%	28.6%	0.0%
Trainings that provide machining experience	14.3%	71.4%	14.3%	0.0%
Trainings that provide knowledge of safety rules and regulations	28.6%	42.9%	28.6%	0.0%
Trainings that provide digital manufacturing experience	14.3%	42.9%	42.9%	0.0%

7. Automotive Technology (n = 5)

	Great Interest	Some Interest	Little to No Interest	Don't know/ Refused
Trainings that provide experience with electric vehicles	0.0%	80.0%	20.0%	0.0%

8. Human Services (such as addiction treatment services, family service workers, etc.) (n = 3)

	Great Interest	Some Interest	Little to No Interest	Don't know/ Refused
Trainings that provide experience helping those with disabilities	33.3%	66.7%	0.0%	0.0%
Trainings that provide experience helping those with addiction	33.3%	33.3%	33.3%	0.0%

9. Other (see verbatim responses) (n = 10)

Section 6. Training Providers & Hiring Channels

21. How satisfied are you with the education and training institutions in and around Northern Santa Barbara County and their ability to provide qualified workers for your firm?

10.6%	Very satisfied
42.6%	Somewhat satisfied
21.3%	Somewhat dissatisfied
8.5%	Very dissatisfied
17.0%	Don't know/ Refused

22. Have you worked with any training or educational institutions, to find or train workers, if yes, could you specify the institutions? [ALLOW MULTIPLE RESPONSES FOR OPTION 1]

18.1%	Yes, our firm has worked with:

75.5%	No
6.4%	Don't know/ Refused

Free responses

28.0%	Allan Hancock
24.0%	Cal Poly
12.0%	Cuesta College
8.0%	UCSB
28.0%	Other

23. Have you ever recruited workers from Allan Hancock Community College in the past?

33.0%	Yes
59.6%	No
7.4%	Don't know/ Refused

24. 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 hiring needs?

34.0%	Yes, please specify (see verbatim responses)
66.0%	No

25. Where do you typically search for qualified talent when hiring for new or open positions at your company?

RANDOMIZE

71.3%	Word of mouth or asking current employees to recruit
62.8%	General online job sites (Indeed, Monster, etc.)
43.6%	Social media sites (Facebook, Instagram, LinkedIn)
13.8%	Local community college job boards
11.7%	Other (please specify)
0.0%	Don't know/ Refused

Free-Response

35.3%	**Allan Hancock**
17.6%	Cal Poly
11.8%	UCSB
11.8%	Cuesta College
5.9%	SBCC
5.9%	Bradman
5.9%	Chapman
5.9%	Taft

Section 7. Closing Questions

26. May we contact you with any additional questions regarding this research?

56.4%	Yes
43.6%	No

27. Would you be willing to provide us with your contact information?

86.7%	Yes
13.3%	No

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. This information will also be used to provide your eReward.

A. First and Last Name of Respondent ___________________

B. Position of Respondent __________________________

C. Phone of Respondent _____________

D. Email of Respondent ______________

E. Name of Company ___________________

F. Company Address (including City) ___________________

Those are all the questions I have.
Thank you very much for your time.

Appendix E: Current and Potential Student Survey Toplines

[bw] RESEARCH PARTNERSHIP

Allan Hancock College

Potential & Current - Student Survey

September 2020

Preliminary Toplines 1.4 (n=234)

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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 **Allan Hancock College** 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 independent 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 not 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!")

~~~~~~

Screener Questions

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

100.0%	Enter zip code

SB. What year were you born?

58.6%	18 to 29 years old
23.0%	30 to 39 years old
11.0%	40 to 49 years old
4.1%	50 to 59 years old
3.3%	60 to 65 years old

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

4.5%	Less than high school
~~~~~~

30.4%	High school diploma or GED
40.1%	Some college
8.8%	Post high school certificate or Associate Degree (A.A. or A.S.)
10.5%	Four-year Bachelor's Degree (B.A. or B.S.)
5.8%	Graduate school (M.S., MBA, M.A., Ph.D, M.D., J.D...)

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**I. Introduction**

Next, we 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?

| | |
|---|---|
| 50.9% | Yes, full-time |
| 20.8% | Yes, part-time |
| 13.3% | No |
| 14.9% | I have recently stopped working or have been furloughed because of regulations or decreased business associated with COVID-19 |

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) (n=234, accepted up to two responses)

| | |
|---|---|
| 20.4% | Online or a specific website (Google, LinkedIn) |
| 15.8% | College, University or School (General) |
| 15.7% | Location (City or State) |
| 9.8% | College, University or School (Specific except for AHC) |
| 9.8% | Identified specific skills for employment |
| 9.3% | Other (family, books, library, newspaper…) |
| 8.1% | Employer (General or specific) |
| 5.9% | None or not aware |
| 3.3% | Job fairs, workforce resource centers or similar |
| 2.0% | Allan Hancock College |

3. Have you heard of **Allan Hancock College**?

| | |
|---|---|
| 93.9% | Yes |
| 5.4% | No |
| 0.7% | Don't know/ Refused |
````````````````````````````````````````````````````````````````````````````````````````````````

[ASK Q4 IF Q3=”Yes”, OTHERWISE SKIP]

4. How did you hear about Allan Hancock College? (n=220)

33.6%	School website
26.5%	Family and friends
15.6%	Social media
11.0%	Career advisor
5.2%	I went to or am attending AHC
4.0%	I live close to AHC
2.4%	Other (Mail, TV and other)
1.7%	Don't know/ Refused

[IF Q3 = “Yes” ASK Q5, OTHERWISE SKIP]

5. Are you currently taking any courses or classes at **Allan Hancock College**? (n=220)

3.4%	Yes, in-person
17.4%	Yes, online
7.2%	Yes, both in-person and online
71.9%	No
0.1%	Don't know/ Refused

II. Educational Profile

[ASK Q6 & Q7 IF Q5=”Yes”; OTHERWISE SKIP TO Q8]

6. Are you currently taking classes to get a degree or a certificate, if so, which the degree or certificate? (n=62)

53.1%	Yes (please specify degree or certificate)
34.9%	Not sure
3.5%	No
8.5%	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? (n=61)

62.2%	Yes, to get a better job
17.1%	Yes, to get a job
13.1%	Yes, to improve my quality of life or to learn something new
7.6%	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)?

25.5%	Very satisfied
38.9%	Somewhat satisfied
18.5%	Somewhat dissatisfied
11.5%	Very dissatisfied
5.7%	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?

RANDOMIZE

	Considerable Challenge	Somewhat a Challenge	Neither Agree nor Disagree	Not a Challenge	It Depends	Don't know/ Refused
A. Paying for tuition or fees	**41.4%**	**26.5%**	**12.7%**	**7.9%**	**6.0%**	**5.5%**
B. Finding programs and courses that work within your schedule	**25.0%**	**37.4%**	**10.0%**	**19.1%**	**5.4%**	**3.1%**
C. Getting transportation to and from the program	**18.6%**	**21.2%**	**13.9%**	**33.9%**	**8.5%**	**3.8%**
D. Finding affordable and effective daycare options for young children while I go to school or training	**22.7%**	**13.7%**	**10.6%**	**35.8%**	**4.5%**	**12.7%**
E. Knowing which education or training programs or courses are worth investing the time and money in	**22.0%**	**37.2%**	**16.2%**	**12.3%**	**6.5%**	**5.7%**
F. Accessing online curriculum	**17.2%**	**25.2%**	**15.9%**	**27.9%**	**7.0%**	**6.9%**
G. Determining the value of an online education	**18.8%**	**32.3%**	**16.1%**	**19.7%**	**6.2%**	**6.8%**

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? (n=65 or 28% of respondents provided a response)

21.4%	Cost, funding or financial burden
18.6%	Special needs (health, motivation, drugs)
15.4%	Time or ability to balance time demands
13.8%	Quality of teachers or teaching environment
12.3%	Difficulty registering or getting classes
10.8%	Information and/or advice on courses
7.7%	Other

11. Next, we are going to ask you about different programs and courses that may be offered at Allan Hancock.

For each of the following programs or courses that may be offered at **Allan Hancock College**, 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?

RANDOMIZE

	Very Interested	Somewhat Interested	Not Interested	Don't know/ Refused
A. Courses that will teach you new skills to advance in your current career	33.2%	38.3%	21.3%	7.1%
B. Courses that will teach you new skills to start a new career	43.3%	31.6%	18.9%	6.2%
C. Courses that help develop better English language skills in the workplace	28.8%	19.6%	45.4%	6.2%
D. Courses that prepare you for an associate degree and/or transfer to a four-year institution	38.1%	28.3%	24.4%	9.2%
E. Courses that teach life skills and greater independence for adults with disabilities	24.1%	23.8%	44.3%	7.8%
F. Courses that prepare you for a career technical certificate	33.0%	35.4%	24.8%	6.8%
G. Courses that teach life-enhancement skills and improve my quality of life	36.1%	34.5%	21.5%	7.9%
H. Courses for individuals who want to become US Citizens	20.7%	15.6%	54.8%	9.0%
I. Courses that improve your ability to learn online	32.1%	39.4%	21.5%	6.9%

12. Are there any other courses or programs that you would want to see offered at **Allan Hancock College** that we have not already discussed? (n=64 or 27% of respondents provided a response)

See verbatim responses – no category equaled more than 5 percent

III. Employment Profile

[ASK Q13 IF Q1="Yes, full-time" OR "Yes, part-time"; IF Q2=3, SKIP TO Q20]

13. Are you currently working at more than one job for pay? (n=168)

32.3%	Yes
64.0%	No
3.7%	Don't know/ Refused

IF Q13="Yes" 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="Yes, part-time", OTHERWISE SKIP TO Q15

14. Would you prefer to have a full-time job? (n=49)

44.4%	Yes
36.6%	No
15.4%	Depends
3.6%	Don't know/ Refused

15. Are you currently working in a permanent position or one that is temporary, contract, or seasonal? (n=168)

63.2%	Permanent
23.0%	Temporary, or seasonal
8.6%	Contract
5.2%	Don't know/ Refused

16. Does your employer pay for healthcare benefits for you and your family? (n=168)

39.7%	Yes, but just for myself
14.8%	Yes, for me and my family
39.2%	No
6.3%	Don't know/ Refused

[ASK Q17 IF Q15= “Temporary, or seasonal” OR “Contract”, OTHERWISE SKIP TO Q18]

17. Would you prefer to have a permanent position? (n=53)

52.1%	Yes
36.1%	No
11.8%	Depends

18. What industry are you currently working in? (n=167)

22.6%	Retail or food service
19.7%	Healthcare (including Dental)
14.5%	Technology or information & communications technologies
14.0%	Criminal justice and fire technology

10.4%	Education and childcare services
7.1%	Manufacturing
6.7%	Professional or business services
6.1%	Automotive technology
5.1%	Construction (building & design)
3.1%	Public sector
0.8%	Finance, business, insurance, or real estate
8.8%	Other

19. What is your occupation or positional title?

Verbatim responses to be provided

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)?

26.2%	Very satisfied
36.7%	Somewhat satisfied
22.1%	Somewhat dissatisfied
6.7%	Very dissatisfied
8.3%	Don't know/ Refused

21. Are you currently looking for a job?

39.9%	Yes
54.7%	No
5.4%	Don't know/ Refused

IV. Unemployment Profile

[ASK Q22 - Q23 IF Q1=”Stopped working due to COVID” or “No”, OTHERWISE SKIP TO Q25]

22. Which of the following descriptions is closest to your current situation? (n=31)

24.4%	Unemployed (includes those looking for work and those not looking)
16.8%	Homemaker or stay at home parent
5.6%	Part-time student who is not looking for paid employment
25.3%	Other
27.9%	Don't know/ Refused

23. How long have you been out of work? (n=27)

5.6%	More than 4 weeks and up to 12 weeks
11.2%	More than 12 weeks and up to 6 months
5.6%	More than 6 months and up to 1 year
51.8%	More than 1 year
25.9%	Don't know/ Refused

V. Occupational Preference and Economic Security Profile

Next, we would like to ask a few brief questions about your career preferences.

24. Has the COVID-19 Pandemic made you more or less likely to continue your education?

16.2%	Much more likely
23.8%	Somewhat more likely
39.0%	No change
8.4%	Somewhat less likely
6.1%	Much less likely
6.5%	Don't know/ Refused

25. 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?

29.5%	Yes
54.9%	No, there has not been a specific career or position that I wanted that required education or training beyond high school
15.6%	Don't know/ Refused

[ASK Q26 IF Q25=”Yes”]

26. Are you currently working in that career or position, or do you expect to in the future? (n=69)

15.6%	Yes, I am currently working in that field
44.6%	Yes, I expect to be working in that field in the future
17.4%	No, I am not working in that field and do not expect to in the future
16.7%	Not sure if I will be working in that field in the future
5.7%	Don't know/ Refused

27. 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.

RANDOMIZE

	Considerable Challenge	Somewhat a Challenge	Neither agree nor disagree	Not a Challenge	It Depends	Don't know/ Refused
A. Getting relevant work and/or industry experience	24.1%	30.2%	18.1%	18.1%	5.6%	3.8%
B. Getting the academic degree and/or certification needed	22.8%	34.3%	17.4%	16.5%	4.3%	4.8%
C. Performing well in interviews	16.1%	26.3%	22.6%	24.4%	5.3%	5.3%
D. Getting the technical training as well as developing technical skills and expertise	17.6%	29.4%	23.6%	21.4%	1.5%	6.7%
E. Getting comfortable and confident communicating with employers and those hiring	18.8%	26.8%	17.5%	25.0%	6.5%	5.3%
F. Developing resumes and related materials that demonstrate your qualifications	17.4%	34.6%	16.5%	21.7%	4.3%	5.4%
G. Getting the free-time needed to focus on my career goals	19.1%	35.7%	14.9%	19.2%	6.5%	4.6%
H. Getting the money and resources needed to invest in my career goals	28.1%	30.8%	19.5%	13.3%	2.0%	6.2%

To wrap things up, we 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?

32.0%	Yes
65.5%	No
2.5%	Don't know/ Refused

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

49.4%	White
42.4%	Hispanic or Latinx
5.4%	Black or African American
4.1%	Asian
2.4%	Pacific Islander
2.0%	American Indian/ Alaskan Native
1.9%	Other
1.1%	Don't know/ Refused

SI. What is your Gender?

40.0%	Male
58.8%	Female
1.3%	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