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AUTHOR Hyde, David
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ABSTRACT

This environmental scan is intended to guide San Francisco City College in the coming years amidst a changing environment. The report is divided into five chapters: Demographic Trends, Enrollment Trends, Economic Trends, Educational Trends, and Policy Trends. Demographic Trends provides an overview of the current population of San Francisco (SF) by examining ethnicity, age, gender, education, poverty status, and other similar factors. When possible, this information is provided for subsections of the city. Additionally, a number of predictions are made about trends in these areas to allow for long term planning. Enrollment Trends provides enrollment trends and forecasts for City College of San Francisco as well as the San Francisco Unified School District (SFUSD). Looking at the students currently in SFUSD provides some indication of what future enrollments of first time, just-out-of-high-school, community college students will look like. Economic Trends discusses labor market trends, earnings, and emerging industries in the SF Bay area. It provides data and projections by industry as well as information on specific occupations. This trend discusses some major economic initiatives in SF and their likely impacts on the local economy. Educational Trends examines policy, practice, and competition in California's institutions of higher education. It provides details about community college funding and discusses the educational context of City College. This trend describes various other educational institutions in SF. Policy Trends discusses political, legal, and policy characteristics likely to effect California community colleges. (Contains 30 references.) (VWC)

ENVIRONMENTAL SCAN, 1999

CITY AND COUNTY OF SAN FRANCISCO

City College of San Francisco
Office of Research, Planning and Grants

August 1999

ENVIROMENTAL SCAN, 1999

CITY AND COUNTY OF SAN FRANCISCO

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Report Prepared By:
David Hyde

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City College of San Francisco
50 Phelan Avenue, E203
San Francisco, CA 94112
415.239.3227 Fax 415.239.3010

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EXECUTIVE SUMMARY

As we enter the next century, City College of San Francisco is faced with a number of important challenges. The institution, long the largest provider of post-secondary education in the City, is anticipating even larger enrollments, more diversified student goals, increasing workforce demands, and limited funding. The next decade will see drastic changes in the City's population, college enrollment patterns, and the structure of the local economy and job market as well as new educational methods, public policies and technological advancements.

This document provides information that College planners, administrators, deans, department chairs and others may use to help guide City College in the coming years amidst the changing demographic, educational and legal environment. This report is divided into five chapters—Demographic Trends, Enrollments Trends, Economic Trends, Educational Trends and Policy Trends—each of which attempts to provide detailed information on specific contextual changes.

DEMOGRAPHIC TRENDS

The demographic profile of San Francisco is changing. The Bay Area will add 1.4 million new residents by 2020, and approximately 30,000 of them will live in San Francisco. Enrollments at City College are expected to increase by as many as 5,000 students by 2005. Like other new California residents, many of these new San Franciscans will be immigrants from Mexico, Central America and Asia. The number of Latinos and native Spanish speakers living in San Francisco will more than double in the next six years. Many of these new residents will turn to City College to meet their educational needs. The College will have to address access issues for these new potential students.

Two age categories are about to surge in San Francisco as well. The portion of the population between ages 18 and 24 and the portion of residents over age 55 are both expected to grow by around 30% in the next decade, compared to 14% growth for all other age groups. For City College this may mean more first-time freshman enrollments and more older adult enrollments.

San Francisco residents can expect to earn an average of 56% more than others workers in California and 63% more than the national average wage. Unfortunately, not all of San Francisco's residents will be so prosperous. In 1990, San Francisco had 68,684 residents living in poverty and that number may grow to over 100,000 by the year 2000. Clearly one mission of City College will be to provide educational access and career development for these residents.

ENROLLMENT TRENDS

While specific predictions vary, it seems certain City College will be faced with growing enrollments in the coming years. These new enrollments will largely reflect the changing demography of San Francisco. As many as 75% of San Francisco high school graduates currently go on to higher education, and as employers demand more skilled labor, college going rates will likely increase, resulting in larger enrollments for CCSF. More than 87% of enrolled K-12 students are members of ethnic minorities, and that percentage may increase slightly in the next few years. City College can expect between 1% and 2% increases in the proportion of Asian and Latino students over the next 5 years, as well as increases in the percentage of women attending the College.

ECONOMIC TRENDS

Industry throughout the nation is demanding more skilled workers to compete in the global economy. Unskilled jobs will decrease from 35% of employment in 1990 to 15% by 2000. It is estimated that by 2005, California Community Colleges will have to increase the percentage of the community served by 7% just to keep up with workforce demands. It will become increasingly vital to a healthy local, state and national economy to prepare entry level workers skilled at the community college level. For workers, this means a two year degree or certificate may be the minimum ticket into high-tech career pathways.

Technical and vocational training at City College will need to reflect emerging employment patterns in the Bay Area. San Francisco's economy in the next decade will be marked by growth in two types of employment—high skilled/high wage technical jobs and low skilled/low wage service jobs. This trend is evident in the two occupations with the greatest predicted job growth the next 5 years—systems analysts and retail clerks. City College can help provide students with the skills and knowledge needed to enter the workforce in lucrative, high-tech, and career-oriented employment.

Firms in construction, computer programming, temporary employment, and health care will be among the top growing companies in the next several years. Industrial production is generally decreasing. It is expected the Bay Area will continue to fall short of workers needed in the information technology field reflected currently by the 30% vacancy rate in government jobs in this field and the large numbers of programmers being recruited from overseas.

Much of the growth expected in San Francisco in the next decade will be in the eastern and south east sections of the City. Specifically, redevelopment projects are under way in the Central Waterfront, Mission Bay, and Bayview/Hunter's Point regions, providing

new jobs, new residential development, and new concentrations of city activity. Also developing is the South of Market region, home to many of the "multimedia gulch" software and graphic design firms rapidly growing in the new economy.

EDUCATIONAL TRENDS

City College is challenged by a number of educational competitors at a time of decreased state funding and increased participation. Since 1975, the proportional share of state and local revenues to California Community Colleges (CCC's) has decreased by 27%. While all segments of education have lost share in the state budget, CCC's have experienced the largest proportional decrease in taxpayer support. City College has been fortunate to receive an annual supplement of around $8 to $9 million through a .25% share in local sales tax.

As access and enrollments at community colleges are expected to increase and State revenues become more scarce, City College will feel a financial crunch. California Community Colleges served 57.5 students per 1,000 adults in 1995, 60 per 1,000 adults in 1998, and by 2005 will serve 78 out of every 1,000 adults. Some alternative funding sources have been developed, such as the $3.6 million CCSF was recently awarded by the "Partnership for Excellence." Future supplementary State funds may be tied to institutional performance. If City College is to maintain both access and quality service, additional public and private funding sources must be nurtured and obtained.

City College's competitors include other Bay Area colleges, private vocational training institutions, branch campuses of private colleges like the University of Phoenix, businesses with in-house training and education, and the emerging numbers of on-line post-secondary educators. CCSF must define the roles it can best fulfill and leave other roles to institutions that are most able to accomplish them. Rather than seeing other institutions as competitors, CCSF may be able to form partnerships and collaborative agreements with them, thereby benefiting both the institutions and the community.

POLICY TRENDS

New local, State, and national public policies will affect City College. Welfare reform, the elimination of affirmative action, and restrictions on both legal and illegal immigration will shape both the student body at City College and the way the College reacts to new enrollments. Additionally, UC and CSU have begun eliminating remedial courses, and it is likely community colleges will have to assume a greater burden of remedial and basic skills education.

The following five chapters provide more detailed information on each of these areas.

I. DEMOGRAPHIC TRENDS

The following section provides an overview of the current population of San Francisco by examining ethnicity, age, gender, education, poverty status, and other similar factors. When possible, this information is provided for subsections of the city. Additionally, a number of predictions are made about trends in these areas to allow for long term planning.

DEMOGRAPHIC TRENDS

A 1998 report by the Association of Bay Area Governments (ABAG) projects that by 2020 the Bay Area will have as many as 1.4 million new residents. Who will they be? How will they alter the demographic profile of San Francisco? What changes will it mean for City College? These are just a few of the questions this section attempts to answer.

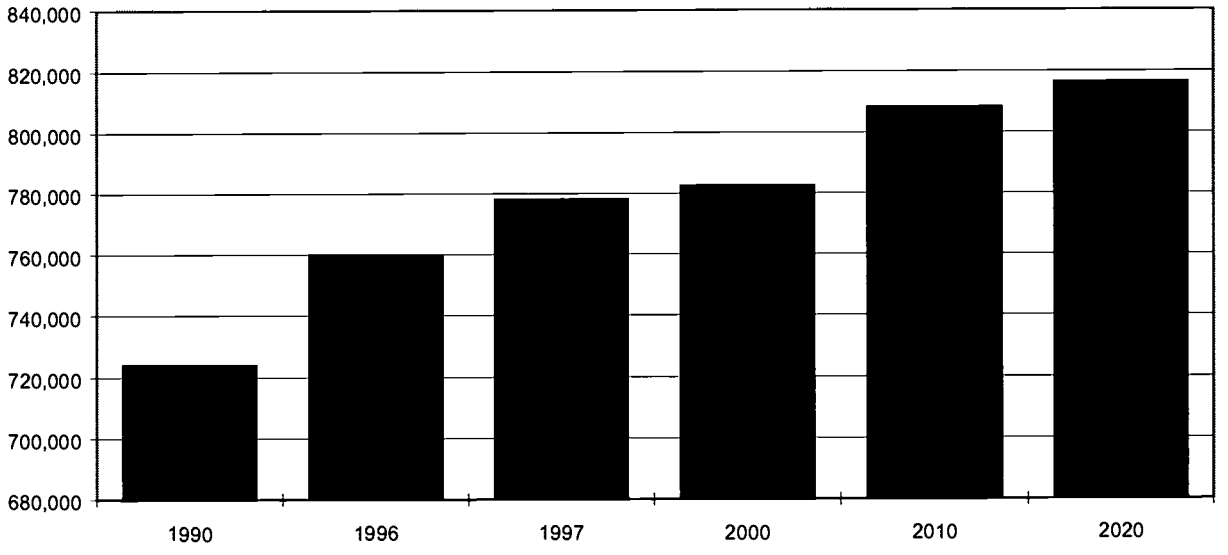
The following table and graph show the current and recent populations of San Francisco as well as projections through 2020.

SAN FRANCISCO POPULATION CHANGES AND PROJECTIONS

1990 census	1996	1997	2000*	2010*	2020*
723,959	759,800	778,100	782,500	808,200	816,300

Source: Department of Finance 1998.
* Projected.

SAN FRANCISCO POPULATION CHANGES AND PROJECTIONS



San Francisco is a rapidly expanding urban technology center. Approximately 780,000 people live in the City. Between 1996 and 1997, the population here grew by 2.41%, the largest percentage increase of any California city with over 100,000 residents. San Francisco accounts for 2.3% of the state's population (Department of Finance, 1998).

DEMOGRAPHIC TRENDS

To project trends in San Francisco's demography two factors must be taken into account: state trends and local trends. The profile of Californians will be changing over the next decade including changes in age, race, and education level. Likewise, San Francisco will see these changes, but it will also be affected by local economic and cultural factors.

Statewide growth in California's population will be in two main age categories. The "baby boom echo" will be felt, increasing the portion of the population in the 18-24 age group—a group which comprises nearly half of community college enrollments statewide. The elderly (over 55) population will also grow by 31% over the next decade, compared to 14% growth for all other age groups (California Community Colleges Chancellor's Office 1997).

California will also experience a changing ethnic composition. In 1990, 40% of Californians were Hispanic, Asian, or African American. By 2002, over 50% of California's population will be non-white, and 30% will be Hispanic (California Community Colleges Chancellor's Office 1997).

Immigration to California doubled from 1.8 million in the 1970's to 3.5 million in the 1980's. More modest growth is expected in the next decade. The largest immigrant groups come from Mexico and Central America, accounting for about one half of all immigrants. This proportion is expected to increase. Asian immigrants comprise another one third of immigrants. Immigrants from Mexico and Central America arrive with the lowest levels of education and often make little economic progress upon arrival, earning an average of $300 a week. This compares to immigrants, often more educated, from Japan, Korea and China, who earn an average of $700 a week, similar to native workers (RAND 1997).

Community College enrollments statewide will change with the state's changing demography. In 1983, 39% of community college enrollments were non-white and 9% were non-citizens. By 1994, that figure had increased to 51% non-white enrollment and 20% non-citizen enrollment (California Community Colleges Chancellor's Office 1997).

Local factors also affect San Francisco's demography. The rich technology, banking, and tourism industries continue to attract a large number of well educated young professionals from across the country. The result has been a surge in new residents in their twenties and a corresponding increase in local rents. Also, because of it's location and history, San Francisco serves as a major gateway to and from Asia. As more Asians immigrate to the United States, San Francisco will be the first stop for many. City College must address these trends, preparing courses and programs ranging from ESL and basic skills courses to highly specialized skills upgrade courses for those working in the technology industry.

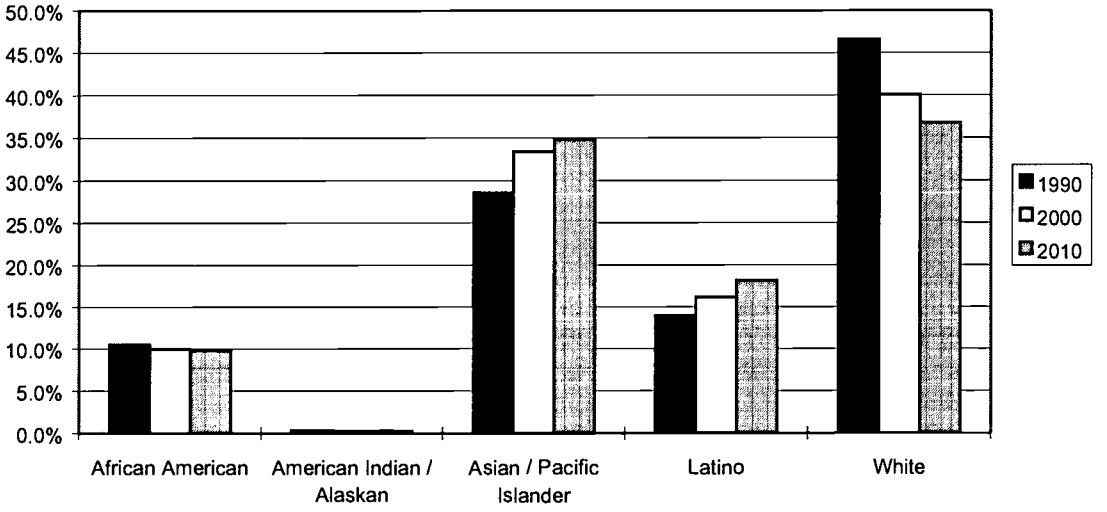
The following tables and charts show recent and predicted changes in San Francisco's ethnic composition between 1990 and 2020.

SAN FRANCISCO POPULATION BY ETHNICITY 1990-2020

	1990	1996	1997	1998	1999*	2000*	2010*	2020*
African American	10.5%	10.0%	10.0%	10.0%	10.0%	10.0%	9.8%	9.7%
American Indian / Alaskan	0.4%	0.4%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%
Asian / Pacific Islander	28.6%	32.3%	32.8%	33.0%	33.3%	33.4%	34.9%	36.1%
Latino	14.0%	15.4%	15.6%	15.8%	16.0%	16.2%	18.2%	20.5%
White	46.6%	41.9%	41.2%	40.9%	40.4%	40.0%	36.8%	33.4%

Source: Department of Finance 1998.
* Projected.

SAN FRANCISCO ETHNICITY TRENDS 1990-2010



Source: Department of Finance 1998.

Another important characteristic to consider in describing San Francisco is the economic situation of its citizens. A long time goal of community colleges has been to lift people out of poverty. By identifying trends and issues facing the less fortunate in San Francisco, City College can design programs to best serve these citizens.

San Francisco is generally an affluent city. In 1998, San Francisco had an unemployment rate of only 4.1% (Employment Development Department 1999). As the following table shows, San Francisco has generally had a very high per capita income.

SAN FRANCISCO MEDIAN PER CAPITA INCOME

	1993	1994	1995	1996
San Francisco	$33,420	$33,939	$36,061	$39,249
California	n/a	n/a	n/a	$25,368
United States	n/a	n/a	n/a	$24,436

Source: Bureau of Economic Analysis 1998

Not all of San Francisco's citizens are so fortunate. The Census Bureau estimates that as many as 93, 714 San Franciscans, 13.0% of the City's population lived in poverty in 1989. By 1993 that number had risen to 98,720, or 13.5% of the population. While accurate and timely figures on poverty are difficult to obtain, most experts agree that the amount of poverty in San Francisco has increased even more in the last 6 years, and may continue doing so.

The Bay Area has 275,000 government aid recipients: 102,113 receive AFDC; 71,781 receive Unemployment Insurance; 71,518 receive only food stamps; and 29,605 receive general assistance. Over $5 billion is spent on these recipients in the Bay Area each year, of which only 6% is spent on education and training and less than 1% is spent on continued training/self-sufficiency. (SF Business Week 10-2-98)

CCC students' family income averaged $23,900 in 1992 compared to $32,800 for CSU students, $48,800 for UC students, and $37,600 for the general population (CCCCO 1997).

The following charts and graphs present information on income, poverty, unemployment and AFDC recipients in San Francisco.

SAN FRANCISCO AFDC RECIPIENTS

1995	1996	1997
13,120	12,090	10,230

Source: Employment Development Department 1998

CHARACTERISTICS OF ECONOMICALLY DISADVANTAGED PERSONS AGE 16-72

	#	%
Total in poverty	68,684	100.0%
Male	31,644	46.1%
Female	37,020	53.9%
African American	13,511	19.7%
American Indian / Alaskan	430	0.6%
Asian	18,875	27.5%
Latino	12,483	18.2%
Pacific Islander	214	0.3%
White	23,173	33.7%
Limited English Proficiency	16,607	24.2%

Source: 1990 Census

For purposes of campus planning, it may also be useful to look at San Francisco in smaller segments, by neighborhood and by zip code. The next section presents estimates and projections for San Francisco's distribution of gender, ethnicity, education and age within parts of the City.

SAN FRANCISCO GENDER BY ZIP CODE

Zip Code	Total Population	Male	Female
94102	26,908	60.90%	39.10%
94103	17,867	63.10%	36.90%
94104	760	74.10%	25.90%
94105	2,054	61.60%	38.40%
94107	12,143	51.00%	49.00%
94108	14,143	47.20%	52.80%
94109	49,396	51.40%	48.60%
94110	70,770	51.00%	49.00%
94111	3,122	51.90%	48.10%
94112	64,320	47.80%	52.20%
94114	30,698	59.50%	40.50%
94115	28,859	46.90%	53.10%
94116	39,970	47.60%	52.40%
94117	38,127	54.00%	46.00%
94118	38,499	46.10%	53.90%
94121	40,430	47.20%	52.80%
94122	52,318	46.60%	53.40%
94123	23,280	43.50%	56.50%
94124	27,239	47.10%	52.90%
94127	17,906	47.80%	52.20%
94129	4,715	55.60%	44.40%
94131	30,521	51.50%	48.50%
94132	23,632	45.50%	54.50%
94133	27,148	49.20%	50.80%
94134	34,635	48.50%	51.50%
S.F. Total	**723,959**	**50.00%**	**50.00%**

Source: 1990 Census

SAN FRANCISCO ETHNICITY BY ZIP CODE

Zip Code	African American	American Indian / Alaskan	Asian / Pacific Islander	White	Latino	Other
94102	19.6%	0.9%	23.1%	44.3%	8.9%	3.2%
94103	9.4%	0.9%	21.2%	38.0%	21.2%	9.3%
94104	7.4%	1.5%	20.6%	68.9%	1.1%	0.5%
94105	8.0%	0.5%	5.6%	75.5%	7.3%	3.0%
94107	18.4%	0.2%	13.5%	55.2%	9.3%	3.5%
94108	1.9%	0.0%	61.1%	34.7%	1.7%	0.6%
94109	3.7%	0.5%	30.8%	57.0%	5.7%	2.2%
94110	3.9%	0.6%	10.3%	36.7%	32.2%	16.3%
94111	3.0%	0.5%	29.3%	63.2%	3.1%	0.9%
94112	8.7%	0.3%	28.2%	31.3%	21.9%	9.7%
94114	2.7%	0.4%	6.6%	76.9%	9.8%	3.6%
94115	26.3%	0.3%	14.0%	53.9%	4.1%	1.4%
94116	1.3%	0.2%	41.1%	50.7%	5.2%	1.4%
94117	18.6%	0.6%	8.2%	64.9%	5.6%	2.0%
94118	2.7%	0.3%	38.0%	53.5%	3.8%	1.7%
94121	2.1%	0.3%	45.0%	46.7%	4.5%	1.4%
94122	2.1%	0.3%	38.7%	51.3%	5.4%	2.1%
94123	1.0%	0.2%	8.4%	85.1%	4.3%	1.1%
94124	59.3%	0.1%	18.5%	10.6%	7.5%	4.1%
94127	4.2%	0.4%	20.1%	67.0%	6.2%	2.2%
94129	19.6%	0.1%	8.8%	57.7%	8.1%	5.6%
94131	5.7%	0.5%	13.4%	64.7%	12.0%	3.8%
94132	17.1%	0.2%	23.1%	51.2%	6.2%	2.2%
94133	2.0%	0.1%	59.6%	35.1%	2.9%	0.4%
94134	19.4%	0.5%	37.3%	22.6%	13.8%	6.5%
S. F. Total	**9.6%**	**0.4%**	**25.7%**	**47.3%**	**11.8%**	**5.2%**

Source: 1990 Census

San Franciscan's tend to be well-educated. The median education in the City is 14.2 years, well above the national average (1990 census). Despite this high average, many San Franciscan's have had less access to the City's many educational opportunities. Several ethnic groups and neighborhoods have significantly less education than the City as a whole. The following table illustrates amount of education by zip code.

SAN FRANCISCO EDUCATION BY ZIP CODE

Zip Code	<9TH Grade	9TH-12TH Grade	HS Grad. or Equiv.	Some College	AA or AS	BA or BS	Grad. or Prof. Degree
94102	11.9%	18.2%	19.6%	23.4%	5.8%	15.3%	5.8%
94103	17.0%	17.9%	20.7%	21.2%	4.5%	14.0%	4.7%
94104	29.6%	17.6%	17.8%	12.7%	10.3%	5.2%	6.8%
94105	1.1%	4.0%	8.1%	29.2%	4.7%	34.8%	18.1%
94107	7.9%	11.6%	17.5%	19.3%	7.4%	23.4%	12.8%
94108	26.2%	12.1%	14.4%	15.5%	5.3%	19.4%	7.1%
94109	10.0%	9.6%	16.5%	21.1%	5.6%	24.8%	12.5%
94110	17.8%	16.7%	20.2%	18.0%	5.0%	15.0%	7.3%
94111	12.8%	6.5%	12.4%	14.0%	4.2%	28.9%	21.3%
94112	13.5%	15.2%	25.1%	20.6%	7.3%	13.4%	4.9%
94114	2.6%	4.5%	13.3%	22.2%	5.6%	31.7%	20.0%
94115	6.1%	8.0%	15.0%	20.8%	5.7%	27.4%	17.0%
94116	8.4%	10.2%	23.3%	20.5%	8.2%	19.4%	9.8%
94117	3.5%	6.1%	13.3%	24.9%	5.6%	30.9%	15.7%
94118	7.2%	8.1%	16.0%	17.9%	6.4%	28.6%	15.9%
94121	9.7%	9.4%	17.2%	20.0%	7.6%	23.5%	12.6%
94122	7.9%	9.3%	18.8%	21.6%	7.2%	23.1%	12.1%
94123	3.1%	3.7%	13.2%	17.6%	5.0%	37.1%	20.4%
94124	12.6%	21.7%	30.9%	20.8%	6.1%	5.4%	2.6%
94127	3.6%	6.4%	17.1%	19.2%	7.0%	25.9%	20.7%
94129	0.6%	2.2%	22.3%	30.8%	9.5%	18.1%	16.6%
94131	4.2%	7.7%	16.8%	19.1%	6.1%	25.8%	20.4%
94132	4.9%	8.0%	20.7%	25.1%	7.7%	22.9%	10.6%
94133	28.0%	11.7%	13.5%	14.6%	3.9%	17.6%	10.7%
94134	16.9%	19.2%	27.1%	18.5%	5.8%	9.8%	2.7%
S.F. Total	**10.4%**	**11.1%**	**18.8%**	**20.3%**	**6.2%**	**21.5%**	**11.6%**

Source: 1990 Census

SAN FRANCISCO AGE BY NEIGHBORHOOD

Bay View

	1990	1995	2000	2005
Total Population	**27,899**	**29,929**	**32,267**	**33,821**
Age 0-4	8.1%	6.3%	6.8%	6.4%
Age 5-19	24.2%	22.9%	20.6%	19.7%
Age 20-44	37.7%	39.5%	40.1%	40.5%
Age 45-64	17.4%	17.8%	19.2%	21.5%
Age 65+	12.6%	13.4%	13.3%	12.0%

Bernal Heights

	1990	1995	2000	2005
Total Population	**23,445**	**24,370**	**25,341**	**25,750**
Age 0-4	6.3%	6.5%	6.0%	5.1%
Age 5-19	16.4%	16.2%	17.5%	18.4%
Age 20-44	47.9%	43.9%	38.7%	35.3%
Age 45-64	18.4%	21.5%	25.6%	29.1%
Age 65+	11.0%	12.0%	12.3%	12.1%

Chinatown

	1990	1995	2000	2005
Total Population	**8,263**	**8,587**	**8,771**	**8,781**
Age 0-4	4.0%	4.6%	5.5%	5.0%
Age 5-19	13.2%	11.9%	12.6%	15.6%
Age 20-44	28.9%	33.0%	34.0%	34.0%
Age 45-64	23.2%	19.9%	19.1%	21.8%
Age 65+	30.8%	30.5%	28.9%	23.6%

Source: Association of Bay Area Governments 1998

Crocker Amazon

	1990	1995	2000	2005
Total Population	**11,050**	**11,436**	**11,878**	**11,797**
Age 0-4	6.5%	6.0%	6.2%	5.6%
Age 5-19	17.7%	17.5%	17.8%	18.7%
Age 20-44	39.3%	39.3%	37.5%	35.5%
Age 45-64	21.2%	21.0%	22.2%	24.9%
Age 65+	15.2%	16.2%	16.4%	15.3%

Diamond Heights

	1990	1995	2000	2005
Total Population	**7,973**	**8,258**	**8,564**	**8,648**
Age 0-4	4.5%	5.5%	5.0%	4.2%
Age 5-19	11.4%	11.5%	13.4%	15.6%
Age 20-44	48.8%	41.9%	35.9%	31.1%
Age 45-64	24.8%	28.4%	31.1%	33.9%
Age 65+	10.5%	12.6%	14.6%	15.3%

Downtown Civic Center

	1990	1995	2000	2005
Total Population	**35,363**	**36,706**	**38,661**	**38,856**
Age 0-4	3.6%	5.0%	4.7%	3.9%
Age 5-19	9.6%	9.9%	12.1%	14.2%
Age 20-44	49.4%	44.7%	39.5%	34.3%
Age 45-64	21.9%	23.8%	26.9%	31.8%
Age 65+	15.5%	16.7%	16.8%	15.8%

Source: Association of Bay Area Governments 1998

Excelsior

	1990	1995	2000	2005
Total Population	**32,976**	**34,165**	**35,585**	**35,730**
Age 0-4	6.2%	5.9%	6.2%	5.7%
Age 5-19	19.0%	18.0%	17.7%	18.2%
Age 20-44	38.8%	39.2%	38.2%	37.3%
Age 45-64	20.1%	20.3%	21.3%	23.8%
Age 65+	16.0%	16.6%	16.6%	15.0%

Financial District

	1990	1995	2000	2005
Total Population	**5,229**	**6,051**	**7,180**	**8,010**
Age 0-4	1.8%	3.4%	3.3%	2.9%
Age 5-19	5.8%	5.6%	8.7%	11.6%
Age 20-44	40.2%	40.6%	38.7%	34.9%
Age 45-64	29.9%	27.8%	27.4%	31.2%
Age 65+	22.4%	22.6%	21.9%	19.3%

Glen Park

	1990	1995	2000	2005
Total Population	**4,098**	**4,245**	**4,400**	**4,461**
Age 0-4	5.0%	6.4%	5.2%	4.0%
Age 5-19	11.6%	11.9%	14.6%	16.8%
Age 20-44	53.5%	45.4%	37.3%	31.5%
Age 45-64	19.3%	25.3%	31.7%	35.6%
Age 65+	10.6%	10.9%	11.3%	12.1%

Source: Association of Bay Area Governments 1998

Haight Ashbury

	1990	1995	2000	2005
Total Population	**25,692**	**26,628**	**27,476**	**27,541**
Age 0-4	3.4%	8.6%	6.8%	4.2%
Age 5-19	7.9%	8.0%	13.9%	18.4%
Age 20-44	67.9%	57.1%	46.7%	35.5%
Age 45-64	13.5%	18.9%	25.4%	34.1%
Age 65+	7.3%	7.3%	7.2%	7.8%

Inner Richmond

	1990	1995	2000	2005
Total Population	**40,308**	**41,794**	**43,194**	**43,628**
Age 0-4	4.3%	7.7%	6.8%	5.0%
Age 5-19	13.3%	11.7%	15.2%	18.6%
Age 20-44	51.1%	46.9%	41.1%	35.4%
Age 45-64	17.8%	19.8%	23.1%	28.2%
Age 65+	13.5%	13.9%	13.7%	12.7%

Inner Sunset

	1990	1995	2000	2005
Total Population	**25,562**	**26,579**	**27,688**	**27,861**
Age 0-4	5.0%	7.8%	6.3%	4.4%
Age 5-19	10.2%	11.4%	15.8%	19.0%
Age 20-44	54.2%	47.4%	40.6%	33.3%
Age 45-64	17.1%	19.8%	24.2%	30.9%
Age 65+	13.4%	13.6%	13.2%	12.4%

Source: Association of Bay Area Governments 1998

Lakeshore

	1990	1995	2000	2005
Total Population	**13,521**	**13,915**	**14,446**	**14,445**
Age 0-4	3.8%	7.0%	7.1%	5.7%
Age 5-19	13.8%	10.6%	14.2%	18.3%
Age 20-44	39.4%	41.1%	38.4%	36.2%
Age 45-64	18.4%	18.0%	19.4%	22.3%
Age 65+	24.6%	23.4%	20.9%	17.5%

Marina

	1990	1995	2000	2005
Total Population	**20,618**	**21,399**	**22,025**	**22,142**
Age 0-4	2.4%	8.0%	5.7%	3.2%
Age 5-19	4.3%	5.1%	11.8%	16.9%
Age 20-44	54.9%	46.9%	38.8%	29.5%
Age 45-64	20.6%	22.6%	27.1%	34.5%
Age 65+	17.8%	17.4%	16.6%	15.8%

Mission

	1990	1995	2000	2005
Total Population	**57,016**	**59,480**	**63,500**	**64,387**
Age 0-4	6.5%	7.0%	6.4%	5.4%
Age 5-19	17.6%	16.9%	18.0%	18.9%
Age 20-44	51.7%	48.2%	43.7%	38.8%
Age 45-64	15.6%	18.7%	22.3%	27.4%
Age 65+	8.6%	9.3%	9.6%	9.5%

Source: Association of Bay Area Governments 1998

Nob Hill

	1990	1995	2000	2005
Total Population	**19,599**	**20,314**	**20,941**	**21,025**
Age 0-4	2.9%	7.0%	6.0%	4.2%
Age 5-19	9.7%	8.5%	12.5%	16.5%
Age 20-44	50.7%	45.7%	39.9%	33.5%
Age 45-64	21.2%	22.0%	24.8%	30.3%
Age 65+	15.6%	16.8%	16.8%	15.5%

Noe Valley

	1990	1995	2000	2005
Total Population	**17,678**	**18,305**	**18,842**	**18,854**
Age 0-4	4.8%	6.9%	5.2%	3.7%
Age 5-19	8.9%	10.4%	14.6%	17.2%
Age 20-44	58.6%	47.8%	38.0%	29.8%
Age 45-64	18.1%	24.7%	31.6%	37.9%
Age 65+	9.6%	10.1%	10.7%	11.4%

North Beach

	1990	1995	2000	2005
Total Population	**12,487**	**12,930**	**13,819**	**13,952**
Age 0-4	3.7%	6.2%	5.3%	4.3%
Age 5-19	11.0%	10.4%	12.9%	15.9%
Age 20-44	47.0%	42.3%	38.3%	32.8%
Age 45-64	23.0%	24.3%	26.5%	30.9%
Age 65+	15.3%	16.8%	17.0%	16.2%

Source: Association of Bay Area Governments 1998

Ocean View

	1990	1995	2000	2005
Total Population	**19,924**	**20,696**	**21,470**	**21,498**
Age 0-4	6.2%	6.0%	6.2%	5.6%
Age 5-19	18.5%	17.6%	17.4%	18.2%
Age 20-44	40.8%	40.1%	38.2%	36.4%
Age 45-64	20.8%	21.1%	22.5%	25.1%
Age 65+	13.8%	15.2%	15.7%	14.7%

Outer Mission

	1990	1995	2000	2005
Total Population	**23,641**	**24,456**	**25,328**	**25,219**
Age 0-4	5.9%	6.2%	6.2%	5.5%
Age 5-19	17.5%	16.7%	17.2%	18.3%
Age 20-44	41.5%	40.3%	37.8%	35.6%
Age 45-64	20.0%	21.3%	23.1%	26.1%
Age 65+	15.1%	15.5%	15.6%	14.5%

Outer Richmond

	1990	1995	2000	2005
Total Population	**30,397**	**31,762**	**32,722**	**33,015**
Age 0-4	4.3%	6.6%	6.1%	4.8%
Age 5-19	13.6%	12.5%	14.9%	17.3%
Age 20-44	45.9%	42.8%	38.3%	34.3%
Age 45-64	19.8%	20.9%	23.7%	28.3%
Age 65+	16.4%	17.1%	17.0%	15.2%

Source: Association of Bay Area Governments 1998

Outer Sunset

	1990	1995	2000	2005
Total Population	**45,491**	**47,093**	**48,813**	**48,897**
Age 0-4	4.8%	6.2%	6.0%	5.1%
Age 5-19	14.9%	14.1%	15.4%	17.4%
Age 20-44	42.9%	41.1%	38.2%	35.3%
Age 45-64	19.5%	20.4%	22.7%	26.7%
Age 65+	17.8%	18.1%	17.5%	15.6%

Pacific Heights

	1990	1995	2000	2005
Total Population	**16,558**	**17,214**	**17,706**	**17,652**
Age 0-4	2.4%	7.4%	5.4%	3.2%
Age 5-19	5.0%	5.6%	11.6%	16.1%
Age 20-44	55.1%	46.4%	37.7%	28.8%
Age 45-64	22.3%	25.5%	30.0%	36.5%
Age 65+	15.2%	15.1%	15.3%	15.5%

Parkside

	1990	1995	2000	2005
Total Population	**20,052**	**20,739**	**21,578**	**21,496**
Age 0-4	5.0%	5.9%	5.8%	5.1%
Age 5-19	15.2%	14.5%	15.6%	17.1%
Age 20-44	40.8%	39.5%	37.4%	35.2%
Age 45-64	20.4%	20.9%	22.2%	25.9%
Age 65+	18.6%	19.2%	19.0%	16.7%

Source: Association of Bay Area Governments 1998

Potrero Hill

	1990	1995	2000	2005
Total Population	**9,836**	**9,681**	**10,756**	**10,641**
Age 0-4	5.9%	6.7%	5.2%	4.7%
Age 5-19	13.1%	14.8%	16.9%	17.6%
Age 20-44	53.8%	45.0%	39.0%	33.0%
Age 45-64	17.9%	23.4%	28.5%	33.9%
Age 65+	9.3%	10.1%	10.4%	10.8%

Presidio Heights

	1990	1995	2000	2005
Total Population	**9,501**	**9,918**	**10,464**	**10,749**
Age 0-4	4.3%	7.2%	5.8%	4.2%
Age 5-19	10.3%	11.2%	14.6%	17.5%
Age 20-44	49.8%	43.4%	38.0%	32.6%
Age 45-64	20.8%	23.4%	26.7%	31.2%
Age 65+	14.8%	14.9%	15.0%	14.4%

Russian Hill

	1990	1995	2000	2005
Total Population	**23,887**	**24,546**	**25,397**	**25,419**
Age 0-4	3.0%	6.7%	5.7%	4.0%
Age 5-19	8.4%	8.1%	12.3%	16.4%
Age 20-44	45.9%	42.0%	37.4%	31.4%
Age 45-64	22.1%	22.1%	24.4%	30.0%
Age 65+	20.6%	21.2%	20.3%	18.2%

Source: Association of Bay Area Governments 1998

Seacliff

	1990	1995	2000	2005
Total Population	**2,468**	**2,621**	**2,790**	**2,813**
Age 0-4	5.6%	4.4%	4.8%	5.0%
Age 5-19	14.9%	15.8%	15.4%	15.6%
Age 20-44	32.9%	32.7%	32.7%	33.3%
Age 45-64	26.4%	25.8%	26.2%	26.5%
Age 65+	20.1%	21.3%	20.9%	19.5%

SOMA

	1990	1995	2000	2005
Total Population	**11,560**	**13,190**	**17,292**	**19,405**
Age 0-4	2.4%	4.6%	3.8%	3.5%
Age 5-19	7.1%	7.6%	11.0%	13.1%
Age 20-44	54.8%	50.6%	47.4%	40.2%
Age 45-64	18.2%	20.2%	22.9%	30.3%
Age 65+	17.5%	17.0%	14.9%	12.9%

Twin Peaks

	1990	1995	2000	2005
Total Population	**11,082**	**11,415**	**11,909**	**11,925**
Age 0-4	2.6%	4.9%	3.9%	2.9%
Age 5-19	5.7%	6.3%	10.2%	13.1%
Age 20-44	51.8%	45.2%	37.4%	29.9%
Age 45-64	20.6%	25.0%	30.9%	37.6%
Age 65+	19.3%	18.5%	17.6%	16.5%

Upper Market

	1990	1995	2000	2005
Total Population	**17,392**	**17,910**	**18,416**	**18,381**
Age 0-4	2.3%	5.9%	4.4%	2.8%
Age 5-19	4.7%	5.3%	9.9%	13.4%
Age 20-44	65.4%	52.9%	40.9%	30.0%
Age 45-64	17.9%	25.6%	34.4%	42.4%
Age 65+	9.8%	10.3%	10.3%	11.3%

Visitation Valley

	1990	1995	2000	2005
Total Population	**14,276**	**14,984**	**15,671**	**15,983**
Age 0-4	7.8%	6.6%	7.0%	6.3%
Age 5-19	22.7%	21.8%	20.3%	20.5%
Age 20-44	39.8%	40.7%	40.1%	38.9%
Age 45-64	18.5%	18.7%	19.6%	22.1%
Age 65+	11.1%	12.2%	12.9%	12.1%

West of Twin Peaks

	1990	1995	2000	2005
Total Population	**28,682**	**29,846**	**31,424**	**31,616**
Age 0-4	5.4%	4.8%	5.1%	5.0%
Age 5-19	15.0%	15.7%	15.6%	15.9%
Age 20-44	35.9%	34.3%	33.5%	33.3%
Age 45-64	24.3%	25.0%	26.1%	27.4%
Age 65+	19.5%	20.2%	19.8%	18.3%

Source: Association of Bay Area Governments 1998

Western Addition

	1990	1995	2000	2005
Total Population	**37,179**	**38,628**	**40,263**	**40,549**
Age 0-4	4.5%	6.9%	6.2%	4.6%
Age 5-19	11.2%	11.5%	14.7%	17.8%
Age 20-44	51.7%	47.0%	41.5%	35.1%
Age 45-64	16.9%	19.5%	23.5%	29.6%
Age 65+	15.7%	15.1%	14.2%	13.0%

II. ENROLLMENT TRENDS

The following section provides enrollment trends and forecasts for City College of San Francisco as well as the San Francisco Unified School District. While these predictions can hardly determine all the factors that will affect long term enrollments at City College, looking at the students currently in SFUSD provides some indication of what future enrollments of first time, just-out-of-high-school, community college students will look like.

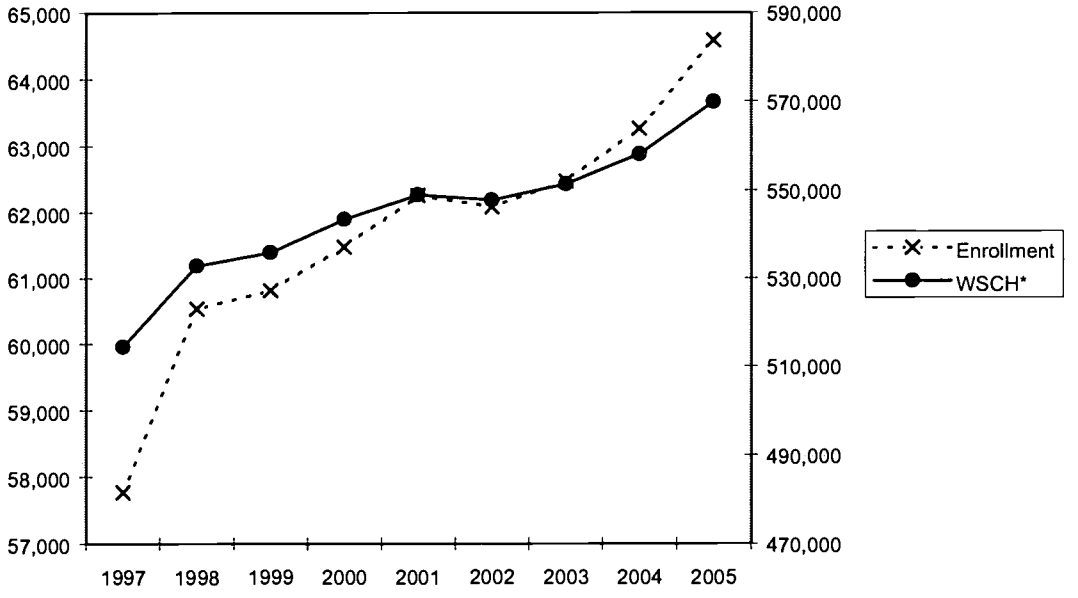
Predicting enrollments for a community college is a difficult task. A number of factors, many addressed elsewhere in this document, can contribute to enrollment patterns. Demographic changes, economic and labor market forces, and even changing cultural norms can play a role. That said, this chapter provides predictions for enrollment published by the State Chancellor's Office as well as San Francisco high school enrollment patterns which will provide a snapshot of some of our future students. The first table and graph show predictions for enrollments at City College.

SFCCD FALL ENROLLMENT PROJECTIONS 1997-2005

	1997	1998	1999	2000	2001	2002	2003	2004	2005
Enroll.	57,772	60,536	60,818	61,486	62,259	62,085	62,471	63,262	64,581
WSCH*	514,358	532,883	535,923	543,492	548,999	547,782	551,419	558,139	569,876

Source: California Community Colleges Chancellor's Office 1998
* Weekly Student Contact Hours

SFCCD FALL ENROLLMENT PROJECTIONS 1997-2005



For purposes of comparison, the next table presents similar projections for enrollments in California Community Colleges, California State University and the University of California.

CALIFORNIA PUBLIC POSTSECONDARY UNDERGRADUATE FALL ENROLLMENT PROJECTIONS

	1997	1998	1999	2000	2001	2002	2003	2004	2005
CCC	1,408,100	1,439,602	1,478,862	1,523,468	1,568,155	1,611,706	1,659,515	1,705,844	1,750,437
CSU	282,603	290,944	300,767	308,786	316,924	324,399	331,100	337,659	344,967
UC	129,214	133,214	136,682	138,720	141,176	144,120	147,643	151,100	154,677

Source: Department of Finance 1997

The enrollment projections presented on the previous page for SFCCD reflect two factors. First, as outlined in Chapter One, the population of San Francisco will continue to increase. The second factor that will increase enrollments at City College is an increase in the portion of Californians attending community colleges.

Participation rates at California Community Colleges have been on the rise. Over the course of their lives, 75% of Californians will have used some of the educational services from community colleges, and that percentage is gradually increasing (Department of Finance 1997). This compares to 16.6% of Californians served by CSU and 8.3% of Californians served by UC. Throughout the 1990's CCC annual participation rates have increased for non-white females. Participation rates have decreased for non-white males and both male and female whites (California Community Colleges Chancellor's Office 1997).

Community Colleges will have to develop access programs in order to maintain acceptable participation rates, help ensure economic justice across demographic lines, and provide the state with a competitive workforce. Access must be increased for African American and Hispanic students. Further, English as a Second Language programs will have to expand to better serve the growing non-native population in California. We will need to increase overall access by 7% by 2005 just to keep up with workforce demands for more highly skilled workers, and groups with the lowest participation rates are prime candidates for this necessary increase in access (California Community Colleges Chancellor's Office 1997).

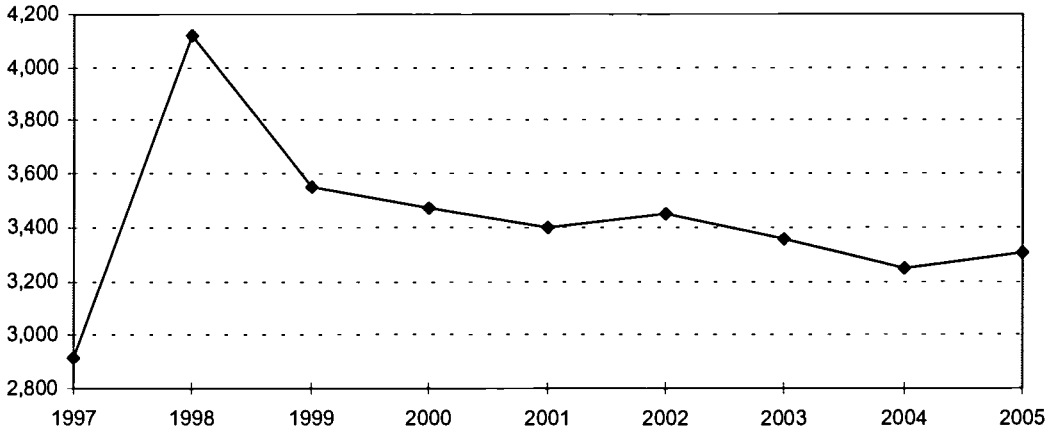
Another way to make predictions about enrollments at City College of San Francisco is to look at the current composition of San Francisco Unified School District. While City College enrolls a wide variety of students, ranging from recent immigrants to those wanting to upgrade a specific job skill, many students still come from local high schools. San Francisco Unified Schools (K-12) currently enrolls 61,000 students (Department of Finance 1999). The following tables and charts provide information on San Francisco Unified School District's enrollments and graduates.

SFUSD GRADUATION PROJECTIONS

	1997	1998	1999	2000	2001	2002	2003	2004	2005
Grads	2,916	4,118	3,552	3,474	3,397	3,446	3,358	3,247	3,305

Source: SFUSD 1997

SFUSD GRADUATION PROJECTIONS

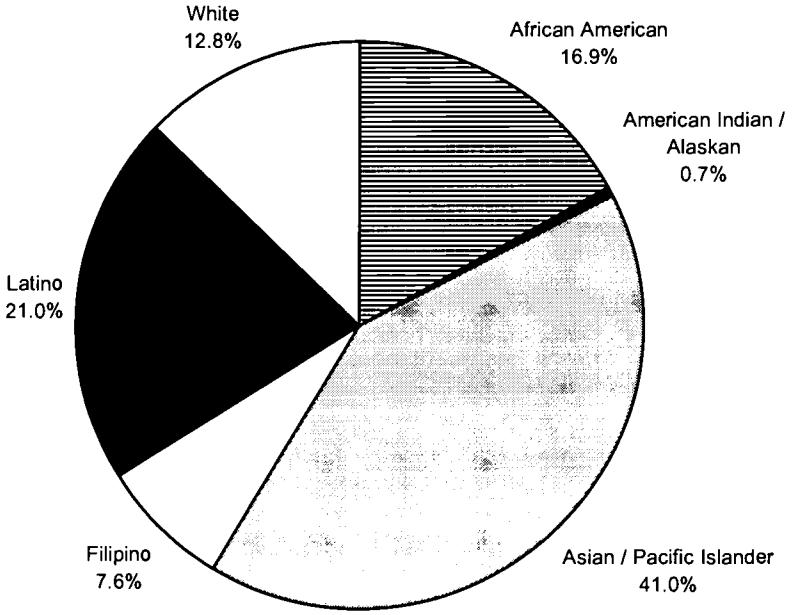


1996 SFUSD ENROLLMENT BY ETHNICITY

	#	%
African American	10,272	16.79%
American Indian / Alaskan	437	0.71%
Asian / Pacific Islander	24,951	40.79%
Filipino	4,621	7.55%
Latino	12,792	20.91%
White	7,788	12.73%

Source: Education Data Partnership 1998

1996 SFUSD ENROLLMENT BY ETHNICITY



III. ECONOMIC TRENDS

This section discusses labor market trends, earnings and emerging industries in the San Francisco Bay area. It provides data and projections by industry as well as information on specific occupations. Finally, it discusses some major economic initiatives in San Francisco and their likely impacts on the local economy. When possible, information is provided at the neighborhood level.

ECONOMIC TRENDS

San Francisco is significantly influenced by its robust and dynamic economy. It has expanded beyond its roots as a sea port to become a crucial component of California's economy. It is the largest financial center on the West Coast and home to a number of major investment and banking corporations. It is the center of the booming multimedia and internet industries. It is a city visited by millions of tourists each year. In order to preserve this economic position, new initiatives are constantly in progress in the City. This chapter reports on these initiatives, as well as providing information on industry and job trends in San Francisco.

In 1994, San Francisco employed 656,202 people (Department of Finance 1997). The per capita income in 1994 was $33,743. By 1996 it had risen to $39,249. This ranks San Francisco 2nd in the state in personal income—155% of the state average and 161% of the national average (Bureau of Economic Analysis 1998). There are a total of 1,008,100 jobs in the San Francisco Bay Area, including 16,600 new jobs last year (Employment Development Department 1998).

A number of plans exist to try to maintain these trends. The central waterfront district is being rebuilt and thousands of housing units and office spaces built. Vast expansion and construction is occurring the area known as "Multimedia Gulch". A new UCSF Bioscience campus is being built on Mission Bay. A number of new residential and hotel projects are underway and Sony just opened the Metreon Center in South of Market.

Forecasts for economic growth in California over the next decade range from 2.2% to 3.3% annually, consistent with the average annual state economic growth of 3% over the last 30 years. California's inflation is expected to be slightly lower, at 3%-4% annually, than it was the last 30 years (>5% annually). As a result of the still-deflated Asian economy and the year 2000 computer problem, California may experience a small recession around 2000. This would hinder growth for 2-3 years followed by a return to economic recovery in the following years (California Community College Chancellor's Office 1998).

From 1995-2002, San Francisco will add 51,100 new jobs. Services, retail trade and construction will see the greatest occupational growth. Temporary employment agencies (adding 11,500 new jobs) and computer programming firms (adding 6,800 new jobs) are expected to have the largest industry growth (Employment Development Department 1998). The following tables provide more detail on industry growth in San Francisco.

BAY AREA EMPLOYMENT PROJECTIONS BY INDUSTRY

	1995	2000	2005
Agriculture	34,220	32,210	31,010
Construction	135,420	153,250	165,590
Manufacturing	454,820	534,030	572,680
High Technology*	235,510	292,360	308,900
Transp., Comm., & Utilities	185,930	208,260	220,260
Wholesale	172,170	190,860	223,000
Retail	487,130	552,570	577,510
F.I.R.E.	208,740	220,140	227,630
Services	1,080,770	1,310,340	1,441,340
Business Services*	378,120	484,550	551,320
Government	269,090	258,380	266,940
Total Jobs	**3,028,290**	**3,460.040**	**3,725,960**

Source: Association of Bay Area Governments 1998
* High Technology jobs are included in the count of Manufacturing jobs. Business Services jobs are included in the count of Services jobs.

SAN FRANCISCO EMPLOYMENT PROJECTIONS BY INDUSTRY 1994-2001

	1994	2001	Absolute Change	Percent Change
Construction and Mining	11,600	12,700	1,100	9.5%
Manufacturing	35,900	33,700	-2,200	-6.1%
Transportation and Utilities	35,100	31,800	-3,300	-9.4%
Wholesale Trade	22,300	22,800	500	2.2%
Retail Trade	72,200	74,800	2,600	3.6%
F.I.R.E.	67,000	65,500	-1,500	-2.2%
Hotels & Lodging	18,100	18,900	800	4.4%
Business Services	45,600	56,900	11,300	24.8%
Amusements	9,200	9,900	700	7.6%
Health Services	24,200	23,600	-600	-2.5%
Private Educational Services	11,400	12,800	1,400	12.3%
Engineering & Management	26,000	29,400	3,400	13.1%
Government	81,900	80,200	-1,700	-2.1%
S.F. TOTAL	**512,200**	**526,600**	**14,400**	**2.8%**

Source: Employment Development Department 1997

ECONOMIC TRENDS

The largest job growth between 1995 and 2020 will be in business services. The fastest growing industry from 1995-96 was Finance, Insurance, and Real Estate which increased 12.3% (Bureau of Economic Analysis 1998). High tech will stabilize and remain fairly constant (as a percentage) over the next 20 years (Association of Bay Area Governments 1998).

While industrial production is generally declining in San Francisco, from 35% in 1976, to 25% in 1986, and to 22% in 1996, two areas are actually growing. Printing and apparel manufacturing have increased in the number employed in the 1990's and are expected to continue growing modestly. (SF Planning Department 1998).

Nationally, the fastest growing industries between 1996 and 2006 will be computer and information systems and health care (American Association of Community Colleges 1998).

Perhaps the most dynamic industry in San Francisco is high technology including New Media production and information technology jobs. Bay area tech firms are so short of workers, that firms such as Oracle are willing to provide curriculum, software, training and technical support to local colleges that will teach courses designed to teach the skills needed in IT (SF Business Times 8-14-98). CCSF could partner with Bay Area IT companies to provide training in return for education resources.

In the Bay Area, there is a 30% vacancy rate in government IT jobs. These jobs start at $41,000 to $67,00. While many require a baccalaureate degree, a number are skill-based jobs with internships available to community college students and graduates (SF Business Week 6-19-98).

To further illustrate job trends in San Francisco, the following tables show the growth in various occupations in San Francisco.

PROJECTED SAN FRANCISCO EMPLOYMENT GROWTH

BY OCCUPATION 1994-2000

	1994 Jobs	2001 Jobs	Percent Change
Managers and Administrators	42,410	45,330	6.9%
Management Support	25,420	25,740	1.3%
Engineers, Architects, Surveyors	13,030	13,980	7.3%
Natural Scientists and Workers	2,740	3,020	10.2%
Computer, Math, and OPS	8,940	10,490	17.3%
Social Science and Religious	6,520	7,120	9.2%
Law and Legal Professions	9,810	9,970	1.6%
Education Workers	27,710	29,740	7.3%
Health Workers	22,420	22,630	.9%
Writers, Artists, Entertainers, Athletes	8,960	9,830	9.7%
Misc. Paraprofessionals	6,580	7,400	12.5%
Sales	57,860	60,510	4.6%
Clerical	122,980	118,240	-3.9%
Service Workers	79,110	84,450	6.8%
Agricultural Workers	2,500	2,610	4.4%
Production and Construction	73,670	75,190	2.1%
Total	**512,200**	**526,600**	**2.8%**

Source: Employment Development Department 1997

TEN OCCUPATIONS WITH THE GREATEST ABSOLUTE JOB GROWTH IN SAN FRANCISCO 1994-2001

	1994	2001	Absolute Change
Systems Analysts	2,940	4,070	1,130
Janitors	10,150	11,180	1,030
Guards and Security	5,930	6,870	940
General Managers and Executives	15,420	16,240	820
Waiters and Waitresses	7,470	8,280	810
Receptionists, Information Clerks	5,880	6,570	690
Computer Engineers	890	1,500	610
Cashiers	9,170	9,780	610
Financial Managers	5,410	5,980	570
Sales and Financial Service Agents	3,450	3,980	530

Source: Employment Development Department 1997

TEN OCCUPATIONS WITH THE GREATEST PERCENTAGE JOB GROWTH IN SAN FRANCISCO 1994-2001

	1994	2001	Percent Change
Computer Engineers	890	1,500	68.5%
Home Health Care Workers	650	930	43.1%
Electronic Pagination System Wkrs.	100	140	40.0%
Systems Analysts	2,940	4,070	38.4%
Patternmakers and Layout Workers	580	800	37.9%
Corrections Officers	490	670	36.7%
Personal and Home Care Aides	240	320	33.3%
Employment Interviewers	360	470	30.6%
Technical Writers	170	220	29.4%
Food Service Managers	1,200	1,540	28.3%

Source: Employment Development Department 1997

TEN OCCUPATIONS WITH THE MOST JOB OPENINGS IN SAN FRANCISCO 1994-2001

	Number of Openings
Salespersons	4,460
Cashiers	3,910
Waiters and Waitresses	3,530
General Managers and Executives	3,040
Janitors	2,500
Office Clerks	2,050
Counter Attendants-Food	1,990
Secretaries	1,810
Guards and Security	1,800
Receptionists	1,620

Source: Employment Development Department 1997

Similar trends exist on a national level. The following table shows the top program earnings for community college students on the West Coast.

TOP PROGRAM EARNINGS FOR PACIFIC STATES IN 1997

	Average Salary
Registered Nursing	$27,721
Automotive	$27,500
Law Enforcement	$28,300
Computer Technology	$30,533
Emergency Medical Services	$28,667
Licensed Practical Nursing	$18,250

Source: American Association of Community Colleges 1998

It's also important to note the trends occurring in the type of employment available. High-skilled jobs are growing rapidly, but low-skilled jobs are becoming more scarce. Currently, San Francisco ranks 1st nationally in low skilled jobs for ex-welfare recipients. The average here is .2 job seekers for every job offered. In the next 5 years San Francisco will have 25,404 new low skilled jobs for 8,186 ex-welfare recipients (U.S. Conference

of Mayors 1998). Between 1997 and 2002 there will be 16,000 new jobs in the Bay Area for low skilled workers. Of these new jobs, 32% will be in food service and hospitality, 23% in retail, 16% in clerical, 11% in service, 8% in industrial/construction, 4% in banking, 3% in health care, and 3% in education (SF Business Times 9-18-98).

Despite a relatively high proportion of low skilled jobs in San Francisco now, demand for low skilled workers is decreasing in California and only those with moderate to high technical skills will be able to fully participate in the 21st century California economy. Between 1970 and 1990, 85% of California's new jobs went to workers with at least some postsecondary training (RAND 1997). Unskilled jobs nationwide dropped from 60% of employment in 1950, to 35% in 1990, and is expected to drop to 15% by 2000. By 2005, 3 out of 5 new workers nationally will need some postsecondary education and technological skills. In California, community colleges must provide a large portion of this education if California is to remain economically prosperous and competitive. Community colleges will need to fill the niche for "techno-professionals", individuals trained in specialized fields requiring less than a baccalaureate degree, and constantly evolving to meet new industry needs. Likely skills needed will include teamwork, critical thinking and communications, along with more technical skills like biotechnology, environment, electronics, information handling, and hi-tech manufacturing (California Community Colleges Chancellor's Office 1997).

The San Francisco economy will affect various groups differently. Currently, immigrants, both legal and illegal, from Mexico and Central America have earnings significantly lower than immigrants from Asia and Europe. Economic yields for immigrants attending U.S. schools are greater than those attending schools in Mexico and Central America. Immigrants born in Mexico or Central America will need to attend U.S. schools to earn similar wages to those born within the U.S. or immigrants from other regions. Given that these two categories constitute the largest group of new immigrants to California (see Chapter 1), City College will have a growing role to play in providing education, job training, and English language instruction for these immigrants.

Just as different groups have reaped greater and lesser benefits from San Francisco's economic growth, variation in growth has also existed amongst different locations in the City. The next pages provide detail on San Francisco's Economy and Occupational trends by neighborhood.

SAN FRANCISCO JOBS AND INCOME BY NEIGHBORHOOD

Bay View

	1990	1995	2000	2005
Total Jobs	**32,313**	**32,293**	**34,927**	**37,805**
Agriculture	60	38	42	40
Manufacturing	3,981	4,984	5,283	5,563
Wholesale	4,070	3,069	3,252	3,077
Retail	3,134	3,133	3,291	3,490
Services	6,726	6,725	8,381	10,904
Other	14,342	14,344	14,678	14,731
Number Employed	**9,950**	**9,968**	**11,008**	**12,227**
Household Income	**$40,144**	**$42,996**	**$49,505**	**$55,665**

Bernal Heights

	1990	1995	2000	2005
Total Jobs	**3,311**	**3,424**	**3,754**	**3,802**
Agriculture	4	2	2	2
Manufacturing	105	121	127	169
Wholesale	105	90	95	106
Retail	686	742	768	766
Services	2,058	2,120	2,389	2,388
Other	353	349	373	371
Number Employed	**12,379**	**11,935**	**12,602**	**13,427**
Household Income	**$50,960**	**$53,755**	**$58,119**	**$63,040**

Source: Association of Bay Area Governments 1998

Chinatown

	1990	1995	2000	2005
Total Jobs	**9,459**	**8,598**	**8,583**	**8,599**
Agriculture	70	121	142	142
Manufacturing	1,751	1,563	1,472	1,519

Wholesale	348	237	229	214
Retail	3,412	2,940	2,929	2,945
Services	2,222	2,245	2,273	2,268
Other	1,656	1,492	1,538	1,511
Number Employed	**3,398**	**3,457**	**3,459**	**3,658**
Household Income	**$28,439**	**$29,409**	**$31,791**	**$34,621**

Crocker Amazon

	1990	1995	2000	2005
Total Jobs	**862**	**818**	**853**	**866**
Agriculture	2	2	1	1
Manufacturing	19	18	20	21
Wholesale	48	38	41	37
Retail	177	154	166	174
Services	271	259	268	279
Other	345	347	357	354
Number Employed	**5,456**	**5,251**	**5,540**	**5,802**
Household Income	**$58,352**	**$61,400**	**$69,700**	**$74,300**

Source: Association of Bay Area Governments 1998

Diamond Heights

	1990	1995	2000	2005
Total Jobs	**534**	**578**	**680**	**744**
Agriculture	11	7	8	7
Manufacturing	7	8	10	11
Wholesale	0	0	0	2

Retail	287	319	345	355
Services	92	107	170	216
Other	137	137	147	153
Number Employed	**4,873**	**4,741**	**5,004**	**5,237**
Household Income	**$73,664**	**$78,267**	**$86,197**	**$91,986**

Downtown Civic Center

	1990	1995	2000	2005
Total Jobs	**42,038**	**38,148**	**42,596**	**43,723**
Agriculture	108	64	61	52
Manufacturing	1,326	1,293	1,498	1,486
Wholesale	1,110	866	875	902
Retail	5,797	5,292	5,531	5,745
Services	19,436	20,429	24,058	25,202
Other	14,261	10,204	10,573	10,336
Number Employed	**16,983**	**16,598**	**17,878**	**18,826**
Household Income	**$24,395**	**$25,847**	**$29,474**	**$33,014**

Source: Association of Bay Area Governments 1998

Excelsior

	1990	1995	2000	2005
Total Jobs	**2,749**	**2,647**	**2,788**	**2,864**
Agriculture	16	8	8	9
Manufacturing	67	68	78	85
Wholesale	56	46	50	47
Retail	529	470	507	531

Services	1,051	1,017	1,058	1,110
Other	1,030	1,038	1,087	1,082
Number Employed	**15,854**	**15,302**	**16,230**	**17,111**
Household Income	**$54,327**	**$57,983**	**$65,782**	**$69,700**

Financial District

	1990	1995	2000	2005
Total Jobs	**184,231**	**165,897**	**179,233**	**185,480**
Agriculture	910	1,235	1,426	1,334
Manufacturing	7,743	5,973	5,428	5,490
Wholesale	8,005	5,339	5,359	5,511
Retail	18,014	15,424	15,942	15,972
Services	66,410	62,726	75,585	79,255
Other	83,149	75,200	75,493	77,918
Number Employed	**2,836**	**3,159**	**3,861**	**4,557**
Household Income	**$47,449**	**$50,496**	**$54,490**	**$60,812**

Source: Association of Bay Area Governments 1998

Glen Park

	1990	1995	2000	2005
Total Jobs	**273**	**277**	**313**	**329**
Agriculture	5	2	3	3
Manufacturing	18	19	22	23
Wholesale	3	4	3	5
Retail	133	134	136	138
Services	88	92	121	131

Other	26	26	28	29
Number Employed	**2,592**	**2,481**	**2,633**	**2,800**
Household Income	**$66,442**	**$69,900**	**$76,800**	**$83,800**

Haight Ashbury

	1990	1995	2000	2005
Total Jobs	**6,144**	**6,128**	**6,708**	**6,589**
Agriculture	2	2	1	3
Manufacturing	54	51	57	58
Wholesale	88	77	82	76
Retail	863	879	1,000	1,002
Services	4,786	4,781	5,200	5,073
Other	351	338	368	377
Number Employed	**17,980**	**17,428**	**18,269**	**19,234**
Household Income	**$57,404**	**$59,593**	**$66,117**	**$70,754**

Source: Association of Bay Area Governments 1998

Inner Richmond

	1990	1995	2000	2005
Total Jobs	**12,391**	**11,767**	**12,731**	**12,998**
Agriculture	43	27	30	30
Manufacturing	161	66	65	86
Wholesale	211	85	86	99
Retail	3,340	3,036	3,388	3,428
Services	6,458	6,451	6,887	7,078
Other	2,178	2,102	2,275	2,277

Number Employed	**22,377**	**21,769**	**22,663**	**24,203**
Household Income	**$61,033**	**$63,778**	**$71,346**	**$76,479**

Inner Sunset

	1990	1995	2000	2005
Total Jobs	**19,355**	**19,371**	**19,382**	**19,454**
Agriculture	31	19	24	23
Manufacturing	232	211	209	215
Wholesale	293	259	262	259
Retail	1,202	1,201	1,202	1,206
Services	14,819	14,937	14,780	14,908
Other	2,778	2,744	2,905	2,843
Number Employed	**14,811**	**14,321**	**15,230**	**16,003**
Household Income	**$58,106**	**$61,702**	**$68,681**	**$73,500**

Source: Association of Bay Area Governments 1998

Lakeshore

	1990	1995	2000	2005
Total Jobs	**11,109**	**11,301**	**11,775**	**11,799**
Agriculture	0	0	0	0
Manufacturing	2	6	11	28
Wholesale	320	297	351	343
Retail	3,323	3,601	4,064	4,200
Services	5,808	5,800	5,710	5,593
Other	1,656	1,597	1,639	1,635

Number Employed	**6,805**	**6,661**	**7,014**	**7,358**
Household Income	**$57,124**	**$61,134**	**$69,286**	**$76,084**

Marina

	1990	1995	2000	2005
Total Jobs	**9,219**	**8,716**	**8,770**	**8,765**
Agriculture	67	40	47	41
Manufacturing	43	41	42	44
Wholesale	1,001	750	746	753
Retail	2,921	2,715	2,709	2,751
Services	3,334	3,348	3,403	3,340
Other	1,853	1,822	1,823	1,836
Number Employed	**13,745**	**13,390**	**13,971**	**14,696**
Household Income	**$75,718**	**$79,889**	**$90,758**	**$98,730**

Source: Association of Bay Area Governments 1998

Mission

	1990	1995	2000	2005
Total Jobs	**34,539**	**33,937**	**36,508**	**36,798**
Agriculture	60	36	41	39
Manufacturing	4,895	5,242	5,475	5,721
Wholesale	1,983	1,637	1,712	1,596
Retail	3,709	3,710	3,836	3,891
Services	14,336	13,756	15,482	15,587
Other	9,556	9,556	9,962	9,964

Number Employed	**29,264**	**28,476**	**30,915**	**32,879**
Household Income	**$39,775**	**$42,088**	**$46,851**	**$50,567**

Nob Hill

	1990	1995	2000	2005
Total Jobs	**9,889**	**9,364**	**9,714**	**9,832**
Agriculture	26	17	17	15
Manufacturing	443	409	473	487
Wholesale	136	96	133	125
Retail	1,932	1,725	1,784	1,843
Services	6,530	6,347	6,486	6,530
Other	822	770	821	832
Number Employed	**11,371**	**11,011**	**11,618**	**12,195**
Household Income	**$44,475**	**$46,885**	**$51,711**	**$56,724**

Source: Association of Bay Area Governments 1998

Noe Valley

	1990	1995	2000	2005
Total Jobs	**1,382**	**1,387**	**1,479**	**1,533**
Agriculture	6	4	4	4
Manufacturing	58	61	64	70
Wholesale	24	23	27	35
Retail	758	759	750	768
Services	307	317	411	434
Other	229	223	223	222

Number Employed	**11,912**	**11,478**	**11,979**	**12,628**
Household Income	**$64,167**	**$68,309**	**$76,288**	**$83,492**

North Beach

	1990	1995	2000	2005
Total Jobs	**26,056**	**24,905**	**25,481**	**25,713**
Agriculture	122	33	32	26
Manufacturing	2,723	2,595	2,759	2,880
Wholesale	873	748	841	779
Retail	3,826	2,863	3,120	3,273
Services	11,546	11,885	11,845	11,818
Other	6,966	6,781	6,884	6,937
Number Employed	**7,103**	**6,930**	**7,531**	**7,959**
Household Income	**$59,826**	**$63,015**	**$70,754**	**$78,857**

Source: Association of Bay Area Governments 1998

Ocean View

	1990	1995	2000	2005
Total Jobs	**559**	**569**	**633**	**639**
Agriculture	12	8	11	10
Manufacturing	0	1	1	1
Wholesale	5	4	4	4
Retail	203	205	225	229
Services	190	208	245	245
Other	149	143	147	150

Number Employed	**9,434**	**9,098**	**9,547**	**10,069**
Household Income	**$50,579**	**$53,723**	**$60,419**	**$65,419**

Outer Mission

	1990	1995	2000	2005
Total Jobs	**4,798**	**4,717**	**4,845**	**4,914**
Agriculture	64	42	47	43
Manufacturing	184	173	197	207
Wholesale	51	43	44	42
Retail	903	801	868	903
Services	2,344	2,411	2,391	2,425
Other	1,252	1,247	1,298	1,294
Number Employed	**12,060**	**11,693**	**12,231**	**12,835**
Household Income	**$55,785**	**$58,174**	**$64,926**	**$69,686**

Source: Association of Bay Area Governments 1998

Outer Richmond

	1990	1995	2000	2005
Total Jobs	**2,555**	**2,512**	**3,452**	**3,678**
Agriculture	54	35	40	36
Manufacturing	7	6	6	8
Wholesale	35	13	12	16
Retail	1,373	1,347	1,506	1,532
Services	754	801	1,528	1,717
Other	332	310	360	369

Number Employed	**15,894**	**15,567**	**16,242**	**17,263**
Household Income	**$53,373**	**$55,959**	**$62,873**	**$67,337**

Outer Sunset

	1990	1995	2000	2005
Total Jobs	**4,221**	**4,248**	**4,952**	**4,977**
Agriculture	18	11	13	12
Manufacturing	15	18	22	24
Wholesale	55	55	73	72
Retail	1,423	1,405	1,717	1,739
Services	1,461	1,519	1,827	1,831
Other	1,249	1,240	1,300	1,299
Number Employed	**23,586**	**22,679**	**23,906**	**25,070**
Household Income	**$54,501**	**$58,619**	**$65,064**	**$69,172**

Source: Association of Bay Area Governments 1998

Pacific Heights

	1990	1995	2000	2005
Total Jobs	**7,213**	**7,169**	**7,211**	**7,183**
Agriculture	65	44	52	49
Manufacturing	56	49	50	52
Wholesale	61	46	46	46
Retail	858	889	895	908
Services	4,933	4,920	4,948	4,923
Other	1,240	1,221	1,220	1,205

Number Employed	**11,147**	**10,839**	**11,339**	**11,887**
Household Income	**$100,035**	**$106,568**	**$119,904**	**$131,274**

Parkside

	1990	1995	2000	2005
Total Jobs	**1,529**	**1,593**	**1,907**	**1,915**
Agriculture	30	18	20	20
Manufacturing	9	9	11	13
Wholesale	20	20	25	25
Retail	523	525	652	674
Services	780	794	956	942
Other	167	227	243	241
Number Employed	**9,938**	**9,555**	**10,075**	**10,566**
Household Income	**$55,164**	**$58,571**	**$64,408**	**$68,673**

Source: Association of Bay Area Governments 1998

Potrero Hill

	1990	1995	2000	2005
Total Jobs	**9,002**	**8,563**	**10,036**	**12,623**
Agriculture	31	49	72	78
Manufacturing	2,588	2,329	2,155	2,223
Wholesale	1,360	1,181	1,241	1,204
Retail	501	587	945	959
Services	2,652	2,645	3,562	5,914
Other	1,870	1,772	2,061	2,245

Number Employed	**5,638**	**5,466**	**5,944**	**5,840**
Household Income	**$57,563**	**$61,512**	**$70,509**	**$75,009**

Presidio Heights

	1990	1995	2000	2005
Total Jobs	**9,334**	**9,114**	**8,966**	**9,192**
Agriculture	60	42	47	44
Manufacturing	107	46	45	62
Wholesale	68	24	25	29
Retail	800	773	869	882
Services	3,800	3,756	3,240	3,421
Other	4,499	4,473	4,740	4,754
Number Employed	**5,836**	**5,712**	**6,103**	**6,557**
Household Income	**$103,686**	**$108,676**	**$121,543**	**$131,927**

Source: Association of Bay Area Governments 1998

Russian Hill

	1990	1995	2000	2005
Total Jobs	**8,826**	**8,040**	**8,156**	**8,197**
Agriculture	32	17	17	14
Manufacturing	1,675	1,535	1,615	1,646
Wholesale	517	386	415	385
Retail	2,749	2,341	2,288	2,331
Services	1,871	1,865	1,883	1,869
Other	1,982	1,896	1,938	1,952

Number Employed	**13,982**	**13,566**	**14,263**	**14,945**
Household Income	**$63,796**	**$67,134**	**$75,065**	**$81,676**

Seacliff

	1990	1995	2000	2005
Total Jobs	**2,384**	**2,370**	**2,587**	**2,493**
Agriculture	7	4	4	4
Manufacturing	0	7	9	13
Wholesale	7	2	4	4
Retail	14	24	30	31
Services	1,765	1,754	1,921	1,837
Other	591	579	619	604
Number Employed	**1,229**	**1,211**	**1,310**	**1,390**
Household Income	**$169,784**	**$177,388**	**$199,510**	**$215,755**

Source: Association of Bay Area Governments 1998

SOMA

	1990	1995	2000	2005
Total Jobs	**77,793**	**76,375**	**96,386**	**107,843**
Agriculture	244	136	142	118
Manufacturing	9,643	10,680	11,698	13,161
Wholesale	8,393	7,083	7,322	7,186
Retail	8,691	8,105	9,978	10,372
Services	21,711	21,142	35,775	43,485
Other	29,111	29,229	31,471	33,521

Number Employed	**5,046**	**5,773**	**8,238**	**9,948**
Household Income	**$33,001**	**$35,696**	**$44,608**	**$53,854**

Twin Peaks

	1990	1995	2000	2005
Total Jobs	**1,791**	**1,659**	**1,863**	**1,875**
Agriculture	2	2	1	1
Manufacturing	3	3	3	3
Wholesale	28	22	22	20
Retail	32	60	80	82
Services	1,631	1,464	1,637	1,645
Other	95	108	120	124
Number Employed	**7,130**	**6,938**	**7,354**	**7,761**
Household Income	**$69,618**	**$74,552**	**$84,053**	**$92,331**

Source: Association of Bay Area Governments 1998

Upper Market

	1990	1995	2000	2005
Total Jobs	**4,209**	**4,184**	**4,561**	**4,578**
Agriculture	0	0	0	0
Manufacturing	10	12	12	19
Wholesale	154	136	145	153
Retail	1,874	1,870	1,857	1,884
Services	1,740	1,759	2,108	2,073
Other	431	407	439	449

Number Employed	**12,629**	**12,192**	**12,717**	**13,323**
Household Income	**$63,394**	**$67,737**	**$76,217**	**$83,601**

Visitation Valley

	1990	1995	2000	2005
Total Jobs	**1,298**	**1,316**	**1,412**	**1,424**
Agriculture	33	21	25	22
Manufacturing	440	422	474	465
Wholesale	17	14	15	14
Retail	114	102	108	115
Services	270	260	269	280
Other	424	497	521	528
Number Employed	**6,288**	**6,139**	**6,668**	**6,965**
Household Income	**$46,435**	**$48,400**	**$54,100**	**$58,100**

Source: Association of Bay Area Governments 1998

West of Twin Peaks

	1990	1995	2000	2005
Total Jobs	**3,975**	**4,028**	**4,164**	**4,161**
Agriculture	13	8	9	8
Manufacturing	59	54	58	58
Wholesale	82	65	64	60
Retail	1,061	1,096	1,134	1,135
Services	1,890	1,930	1,986	2,046
Other	870	875	913	854

Number Employed	**14,879**	**14,469**	**15,391**	**16,286**
Household Income	**$98,368**	**$104,737**	**$117,426**	**$126,629**

Western Addition

	1990	1995	2000	2005
Total Jobs	**15,456**	**15,300**	**16,194**	**16,344**
Agriculture	39	23	32	31
Manufacturing	502	442	456	470
Wholesale	355	266	273	264
Retail	2,704	2,759	2,797	2,834
Services	9,685	9,669	10,435	10,543
Other	2,171	2,141	2,201	2,202
Number Employed	**20,141**	**19,597**	**20,712**	**21,848**
Household Income	**$42,819**	**$45,076**	**$50,207**	**$55,312**

Source: Association of Bay Area Governments 1998

IV. EDUCATIONAL TRENDS

The following section examines policy, practice and competition in California's institutions of higher education. It provides details about community college funding and discusses the educational context of City College. Finally, it describes various other educational institutions in San Francisco.

City College is not alone in its role as a community college. Over 1,100 other community colleges exist nationwide. California alone has 107 community colleges. Nationally, community colleges enroll 5.2 million credit students, and almost as many noncredit students. This is 44% of the nation's undergraduates and 46% of all 1st time freshmen (American Association of Community Colleges 1998). California Community Colleges enroll 1,344,000 students annually compared to 163,704 at UC, 324,950 at CSU, and 182,369 at private colleges and universities (California Higher Education Policy Center 1997).

California Community Colleges served 57.5 students per 1,000 adults in 1995, 60 per 1,000 in 1998, and are expected to serve 78 per 1,000 by 2005. (Board of Governors California Community Colleges 1998).

From 1991 to 1995, the percentage of community college students over age 40 rose from 12.5% to 15.5% nationally. In the same time, minority enrollment has increased from 23.3% to 28.2% (American Association of Community Colleges 1998).

The average annual tuition and fees is $1,254 at public community colleges. This compares to an average of only $300 annually for students at CCSF, making it quite affordable. Nonresidents pay $3200 annually and international students average $3600 per year (American Association of Community Colleges 1998).

From 1980 to 1994, community college revenues provided by the state dropped from 50% to 39% nationally. In California, community colleges' share of state and local revenues decreased by 27% from 1975 to 1995 (California Community Colleges Chancellor's Office 1997).

California provides some of the lowest state funding per community college student in the nation. California Community Colleges spent $3,554 per student in 1994 compared to $6,022 nationally (American Association of Community Colleges 1998). Much of the difference in spending in California per student has been absorbed by larger class sizes, heavier faculty loads, and smaller administrative costs (California Community Colleges Chancellor's Office 1997). Despite the efficiency of the California Community College system, given inflation, California Community Colleges should aim to spend $6,500 per student by 2005. Given increased enrollment and a 10.6% allocation of Proposition 98 revenues to Community Colleges, the state will not meet this funding goal, and community colleges will have a difficult time keeping up with technological workforce education needs (Board of Governors California Community Colleges 1998).

In order to most effectively deal with shortcomings in state funding, the California Higher Education Policy Center (1997) made the following recommendations to help community colleges deal with higher participation rates and increasing enrollments.

Suggestions for the California Community Colleges include:

1. Use resources to improve facilities.
2. Increase usage hours of classrooms-days, evenings, weekends and year round.
3. Offer some upper division courses, and possibly baccalaureate degrees at selected community colleges.
4. Improve transfer capacities of community colleges (and tie funding to transfer rates).
5. Increase enrollments of high school students at community colleges.
6. Increase use of technology to reach a greater number of students more efficiently.
7. Base admissions on assessment. This policy has been adopted by CUNY which is expected to shift 13,000 students from remedial classes at CUNY to similar classes at community colleges. If California institutes a similar policy, California Community Colleges could see increases in the number of transfer oriented students taking general education and remedial courses.
8. Develop outcome measures to asses student learning.
9. Assess the knowledge and teaching skills of new teachers.
10. Deregulate the community college system.

The California Community Colleges Chancellor's Office (1997) has concurred that utilizing technology as an educational and distance learning tool will be essential to community colleges faced with growing enrollments.

Fiscal constraints are not limited to the community college system. Last year San Francisco Unified School District cut $20 million from its budget and eliminated 196 teachers (SF Chronicle 6-22-98).

An increasing number of students will also be served by other educational institutions. A number of "competitors" have grown to challenge many of the roles traditionally served by community colleges. Quick labels aside, these alternative educational institutions may provide excellent opportunities for collaboration with City College. The following categories and examples may help to clarify the types of alternative educational institutions that exist in San Francisco:

• **Convenience**-The University of Phoenix provides for-profit education in Nursing and Business at numerous locations around San Francisco and online.

• **Distance**-Western Governors University partners with Silicon Valley to provide online courses and competency-based degrees. California Virtual University already offers 700 courses online. The International Community College, a partnership of MEU, the League of Innovation, and the Jones Education Networks, will offer a variety of courses in a variety of distance and electronic formats. Some community colleges (Rio Hondo CC for example) are offering web-based instruction.

• **Private Sector**-Today only 2% of higher education is delivered by private firms, but that could jump to 20% in the next 20 years. Currently, these institutions focus on technical training and specialized vocational knowledge. Some offer online courses (Ziff-Davis), others have on site teaching (Microsoft or SAS Institute), others serve as brokers who contract with educational institutions to provide content, instruction, or services (Sylvan Learning Systems).

• **Niche Education**-Industries are combining with traditional educational systems to fill specific needs. In Michigan, GM, Ford, Chrysler, the UAW, the University of Michigan, and Michigan State University have teamed up to create Michigan Virtual Automotive College which seeks to be the one-stop for all training and education for the auto industry. The Bay area may see similar developments in the software industry. This would provide excellent partnership opportunities for City College.

• **Consulting**-A number of firms have arisen to provide the tools necessary to deliver education. Companies like Cisco, IBM and SCT are offering online educational development tools, consulting, and instructional guides to other institutions wanting to explore new forms of educational delivery. IBM's Global Campus services is being used by CSU to develop new technological innovations in education.

• **Overseas Competition**-Various overseas institutions, most notably Britain's Open University, are trying to expand into the American educational market with online instruction and branch campuses. Given the international character of San Francisco, this city is almost certain to be targeted by foreign educational institutions as a market for their services (American Association for Higher Education 1998).

• **In House**-A number of California firms are providing in house training for skills previously obtained in higher education. Of firms with over 100 employees in California, 72% train in computer applications, 65% in Sexual Harassment, 60% in problem solving, 56% in computer programming, 55% in data processing, 53% in public speaking, 50% in writing skills, 49% in strategic planning, 47% in diversity, 46% in finance, 39% in marketing, 37% in ethics, and 19% in foreign languages (Training Magazine 1996).

The table on the next page lists postsecondary educational institutions in the Bay Area, and where available, their enrollments.

BAY AREA POSTSECONDARY EDUCATIONAL INSTITUTIONS

Institution	Fall 1997 Headcount Enrollment
City College of San Francisco (credit)	**28,510**
City College of San Francisco (non-credit)	**29,262**
Academy of Art College	4,839
Brandon College	n/a
California Institute of Integral Studies	690
College of Marin	8,933
CSU, Hayward	8,378
Golden Gate University	6,049
Heald College	503
New College of California	n/a
San Francisco Conservatory of Music	262
San Francisco State University	27,446
San Jose State University	25,874
San Mateo Community College	10,844
Stanford	14,084
Skyline Community College	7,858
UC, Berkeley	31,011
UC, Davis	23,931
UC, Hastings, College of Law	1,215
UCSF	3,589
University of Phoenix	4,100
University of San Francisco	6,415
University of the Pacific, School of Dentistry	n/a

Source: CCSF Office of Research and Planning 1999

V. POLICY TRENDS

The following section discusses political, legal and policy trends likely to effect California Community Colleges. Where possible, specific information on San Francisco is also provided so that specific effects on City College might be anticipated.

AFFIRMATIVE ACTION

California voters passed proposition 209 in November of 1996 with the specific intention of eliminating affirmative action. It reads "The state shall not discriminate against, or grant preferential treatment to, any individual or group on the basis of race, sex, color, ethnicity, or national origin in the operation of public employment, public education, or public contracting." Because City College has an open admissions policy, this should not affect students entering the institution. On the other hand, it may affect targeted student services, hiring and contracting. Compliance is dictated by the Board of Governors. A number of court cases are currently attempting to determine the Constitutionality of this law (California Community Colleges Chancellor's Office 1998).

STUDENT RIGHT-TO-KNOW

Student Right-To-Know is a federally-mandated public disclosure of a college's graduation rate and transfer rate, and certain crime statistics. Essentially, the College must make these statistics readily available to students. These statistics are based on very specific measures of an incoming group of first time students. These rates are based on annual *IPEDS-Graduation Rate Survey* submissions. The State Chancellor's Office will coordinate the data, but it will be up to City College to publish these rates in the College's admissions and informational literature each year.

PROPOSITION 98 SPLIT

The implementing statute for Proposition 98 established that the funding split between K-12 and community colleges would be 89 percent for K-12 and 11 percent for community colleges. In only two of the last eight state budgets has the community colleges received its proportionate share; and the Proposition 98 portion for community colleges in the 1996-97 budget was finalized at 10.3 percent.

In early 1996, the Education Coalition of California, representing the K-12 system, and the Californians for Community Colleges, representing community colleges, negotiated an agreement which established a target allocation percentage of Proposition 98 funds for each segment and allowed five years to achieve that target, culminating in a split of 89 percent for K-12, and 10.6 percent for community colleges. As proposed in AB 445, which failed passage, it also standardized the cost of living adjustment (COLA) for community colleges and K-12; linked the K-12 and community college growth rate (while allowing for legislative direction); and clarified that the community colleges' share of property tax revenue would be distributed in the same manner as K-12 (Board of Governors California Community Colleges 1997).

WELFARE REFORM

The federal "Personal Responsibility and Work Opportunity Reconciliation Act" of 1997 is attempting to reform the welfare system. Specifically, it tightens guidelines for federal aid recipients and limits the amount of time they may receive aid. At the same time, this law mandates that a certain portion of current recipients be removed from the welfare roles. This will place an ever growing burden on community colleges, especially those located in large urban centers.

Under new federal guidelines, enrolled welfare to work participants may only be eligible for two years of assistance while in school. This means the majority of welfare recipients seeking job training will be routed to vocational education programs and two year colleges aimed at quick employment. CCSF currently enrolls about 2,500 welfare recipients. New provisions also increase requirements for employment or vocational education for CalWORKS recipients, so CCSF may see a slight enrollment increase. The state provides $65 million and the federal government provides $16 million through TANF to California Community Colleges for Welfare to Work programs. The majority of these funds (76%) must be spent on child care and work study. The remaining 24% is for job development and placement, curriculum development and program administration (Department of Human Services 1998 and CCSF Office of Workforce Education 1998).

San Francisco serves as a role model for national welfare reform. Currently available jobs for welfare recipients in San Francisco and San Mateo counties outnumber jobseekers nearly 3 to 2. Partnerships between the Department of Human Services and local businesses, from small shops to Chevron Corp. and UCSF-Stanford Medical Center, have created hundreds of job opportunities in San Francisco specifically aimed at welfare recipients currently being trained. City College should work in conjunction with the Department of Human Services and these businesses as closely as possible to determine the skills needed in these jobs. CCSF can expect to provide much of the training for these jobs. It also seems clear that to best serve these partnerships, and the students, City College will need to train these students not just to get a job, which often leads back to welfare within 2 years, but for a career, teaching critical thinking, job searching skills, and more universal education. (SF Business Times 9-18-98)

FINANCIAL AID

POLICY TRENDS

New federal legislation passed by Congress in September will provide more financial aid to college students. Effective July 1st, 1999 interest rates on federally guaranteed student loans will decrease from an average of 8.23% to 7.43%. Annual Pell Grants will be increased from $3,000 to $5,800 in 2003. Federal financial aid will also now be available for schools and students participating in distance learning over the internet. The legislation will also require more extensive federal reporting of "hate crimes" (Reuters News Service 9/30/98).

CAPITAL OUTLAY

State Assembly Bill 1168, placed a $3 billion education bond measure on the March 1996 primary election ballot which was subsequently approved by the voters. As one of the higher education segments, the community colleges received $325 million for support of capital outlay projects in 1996-97 and 1997-98. In addition, the colleges received $20 million in general fund support for Americans with Disabilities Act projects' funding for 1996-97 with a matching requirement. Over $140 million in unfunded ADA projects remain to be funded in the future just to meet federal basic compliance requirements.

For 1996-97, systemwide support for capital outlay projects was $157 million, including $20 million for ADA. For 1997-98, $158.9 million was proposed for funding capital outlay projects. These two years of funding effectively used all authorized bond funds, but a total of $1.7 billion will still be needed to build previously funded proposals and for unmet project costs.

Also on the issue of facility construction funding, Assemblyman Aquiar's AB 2660 became law. It allows public agencies to enter into agreements with private entities for the creation of revenue generating infrastructure projects which would be leased to them and become public property after 35 years (Board of Governors California Community Colleges 1997).

PROPERTY TAX BACKFILL

Community colleges have been plagued by revenue shortfalls over the last several years: in 1991-92, $23 million; in 1992-93, $80 million; and in 1993-94, $98 million. Assembly Bill 973, restored $56 million. The budget process restored $47 million in 1994-95. In 1995, AB 1543, restored $5 million of lost property tax revenue for the 1994-95 fiscal year (Chapter 96-31) and SB 703, provided $9.4 million in property tax restoration for the 1995-96 fiscal year (Board of Governors California Community Colleges 1997).

TRENDS

The State Chancellor's Office (1997) has also identified a number of policy trends likely to occur in the next few years including:

POLICY TRENDS

1. A decrease in remedial classes at CSU, shifting students to CCC's.
2. Further restrictions on affirmative action.
3. Laws which deny education and services to illegal immigrants.
4. A lack of long-term funding for capital outlays.

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