

The External Environment;
Current Conditions and
Short-Term Projections

Office of Institutional Research
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Executive Summary

This report is an analysis of current conditions and projected short-term trends in population, education and economic indicators – the external environment – which will shape Mendocino College. Several critical points emerge:

- In terms of population, Mendocino County will continue to be “grayer” than Lake County. Specifically, the 17 – 26 year population in Mendocino County is projected to decline over the next 8 years. This is offset by growth in the same segment in Lake County. However, Lake County residents currently represent only 25.6% of current enrollment. Attracting more students from Lake County presents an on-going challenge.
- Overall, the population in both counties will, over the next eight years, continue to see a marked shift in the ethnic composition of the population. The Hispanic population will not only increase in terms of number of people but also in terms of percentage of population
- An important issue is the “capture rate” of high school students within the district. Over the past ten years, the capture rate for Mendocino College has been lower than the statewide average. The capture rate from in-district schools in Lake County has been significantly less than that for in-district high schools in Mendocino County.
- Economically, Mendocino and Lake Counties fall below many of the statewide comparison statistics, including percentage of the adult population with any college education. However, there are clear opportunities for expansion of programs in the area of Allied Health and Nursing projected over the next seven years.

Mendocino College does not exist in a vacuum. As a community college, the mission of Mendocino College and its ability to succeed in that mission is tied to the environment in which it exists – the community comprised of the greater portions of Lake and Mendocino counties. There are three components of the external environment to which we must be sensitive:

- **Population.** Demographic information about the community we serve provides the general background in which the College does its work. Demographic projections provide us with general information for planning to continually better serve the needs of the community.
- **Education.** Information about education is critical since this tells us about where our student population comes from. The K-12 systems in Lake and Mendocino counties are critically important, since the largest single group of new students each year is recent high school graduates between the ages of 17 and 26. For example, in Fall 2006, 522 of 833 First-Time students fit this demographic profile. That number represents 62.67% of First-time students and 11.1% of all credit students. Information about education also tells us about the culture that shapes our students and their expectations. Finally, information about education tells us how we are perceived in the community as an educational provider.
- **Employment Projections/Economic Indicators.** Finally, information in this area tells us how well the non-transfer oriented academic programs align with the economic realities of the community. Furthermore, economic projections give us indicators regarding the creation of new academic programs and which existing academic programs may need to be augmented.

Population and Demographic Projections

Mendocino County and Lake County have quite distinct demographic profiles and somewhat different projections regarding how the populations will change over the short-term future (through 2015). Even though the borders of the District are not contiguous with the borders of Mendocino County and Lake County, it is not possible to extract the area served by the District from county or state level data. All references, unless otherwise noted, refer to populations of Mendocino County and Lake County as a whole.

Mendocino County

Mendocino County is the larger of the two counties served by Mendocino College, with a total population of 89,974 people in 2005. Mendocino County has experienced very slow population growth since 1995. Annual change in population from 1995 forward has averaged 0.73%. This is barely above “population replacement” and considerably less than the average population growth in California over the same time period (1.45% per year average). To some extent, Mendocino is also the “grayer” of the two counties. According to projections, the largest age group, with 15.8% of the total population in the Mendocino County population is between the ages of 51 and 60. An additional 18.8% of

the population is age 61 and above. In Mendocino County, residents age 60 and over make up a higher percentage of the population than in California as a whole. Tables 1A and 1B provide projections regarding the Mendocino County population through the year 2015.

Year	0 - 10	11 - 20	21 - 30	31 - 40	41 - 50	51 - 60	61 - 70	71 - 80	81+
2007	12,401	12,998	12,715	10,112	12,037	14,562	8,861	5,161	3,350
2008	12,660	12,675	13,215	10,144	11,729	14,277	9,616	5,143	3,428
2009	12,930	12,385	13,680	10,191	11,403	14,122	10,227	5,190	3,460
2010	13,189	12,195	14,066	10,256	11,138	13,900	10,794	52,72	3,490
2011	13,526	11,893	14,368	10,336	10,935	13,588	11,442	5,398	3487
2012	13,818	11,626	14,590	10,531	10,761	13,367	11,930	5,533	3475
2013	14,156	11,436	14,569	10,954	10,517	13,140	12,314	5,755	3445
2014	14,401	11,472	14,325	11,510	10,337	12,771	12,663	6,039	3427
2015	14,620	11,507	14,093	12,096	10,167	12,438	12,912	6,355	3404

Table 1A: Mendocino County population projections 2007-2015 by age group. Source: California Department of Finance.

Year	0 - 10	11 - 20	21 - 30	31 - 40	41 - 50	51 - 60	61 - 70	71 - 80	81+
2007	13.5%	14.1%	13.8%	11.0%	13.1%	15.8%	9.6%	5.6%	3.6%
2008	13.6%	13.6%	14.2%	10.9%	12.6%	15.4%	10.4%	5.5%	3.7%
2009	13.8%	13.2%	14.6%	10.9%	12.2%	15.1%	10.9%	5.5%	3.7%
2010	14.0%	12.9%	14.9%	10.9%	11.8%	14.7%	11.4%	5.6%	3.7%
2011	14.2%	12.5%	15.1%	10.9%	11.5%	14.3%	12.0%	5.7%	3.7%
2012	14.4%	12.2%	15.3%	11.0%	11.3%	14.0%	12.5%	5.8%	3.6%
2013	14.7%	11.9%	15.1%	11.4%	10.9%	13.6%	12.8%	6.0%	3.6%
2014	14.9%	11.8%	14.8%	11.9%	10.7%	13.2%	13.1%	6.2%	3.5%
2015	15.0%	11.8%	14.4%	12.4%	10.4%	12.7%	13.2%	6.5%	3.5%

Table 1B. Mendocino County population projections 2007-2015 by age group, expressed as percentage of the total County population. Source: California Department of Finance.

Tables 1A and 1b illustrate that Mendocino County is projected to have a “gray” population through 2015. During this entire period, about 35% of the population each year, on average, is projected to 50 or older. However, within that broad view, there is a shift which takes place between 2009 and 2011. During that period, the single biggest group of the population shifts from the 51 – 60 year old group in 2009 to the 21 – 30 age group in 2011. As shown in these projections, the number of people between the ages of 11 – 20 is expected to decrease by 2015 and the age group between 61 and 70 is expected to see the greatest growth between 2007 and 2015.

The major change projected for Mendocino County is in the ethnic distribution of its population. In 2005, 71.4% of all people living in the County were White. The great demographic shift will be the growth of the Hispanic population, both in numbers and as a proportion of the population. Between 2000 and 2015, this group is expected to grow by 47% in total population. And, like other North Bay counties, Hispanic-Americans will displace Whites as the largest ethnic group in the County sometime around 2047-48. Tables 2A and 2b focus upon ethnic change projected to occur between 2007 and 2015.

Year	White	Hispanic	Asian	Pacific Islander	Black	American Indian	Multirace
2007	64,490	18,715	1,459	125	840	4,270	2,298
2008	64,315	19,333	1,516	125	870	4,389	2,339
2009	64,134	19,962	1,573	125	899	4,513	2,382
2010	63,953	20,601	1,632	125	927	4,638	2,424
2011	63,791	21,221	1,691	125	956	4,721	2,468
2012	63,620	21,838	1,750	125	984	4,802	2,512
2013	63,436	22,465	1,810	125	1,011	4,882	2,557
2014	63,242	23,100	1,871	125	1,040	4,965	2,602
2015	63,036	23,745	1,933	125	1,068	5,040	2,645

Table 2A: Mendocino County population projections by ethnic identification, 2007 – 2015.
Source: California Department of Finance

Year	White	Hispanic	Asian	Pacific Islander	Black	American Indian	Multirace
2007	69.95%	20.30%	1.58%	0.14%	0.91%	4.63%	2.49%
2008	69.24%	20.81%	1.63%	0.13%	0.94%	4.73%	2.52%
2009	68.53%	21.33%	1.68%	0.13%	0.96%	4.82%	2.55%
2010	67.82%	21.85%	1.73%	0.13%	0.98%	4.92%	2.57%
2011	67.17%	22.34%	1.78%	0.13%	1.01%	4.97%	2.60%
2012	66.53%	22.84%	1.83%	0.13%	1.03%	5.02%	2.63%
2013	65.88%	23.33%	1.88%	0.13%	1.05%	5.07%	2.66%
2014	65.23%	23.83%	1.93%	0.13%	1.07%	5.12%	2.68%
2015	64.59%	24.33%	1.98%	0.13%	1.09%	5.16%	2.71%

Table 2B: Mendocino County population projections by ethnic identification, 2007 – 2015, expressed as a percentage of the population. Source: California Department of Finance.

Even within the near-term future, the demographic shift in ethnicity is evident. While there is some minor growth projected for the Asian population (474 net growth) and the American Indian population (770 net growth), this is offset by the decline (-1,454) in the White population. The true population growth which is projected for Mendocino County, is in the Hispanic population (5,030). Growth among the Hispanic population accounts for over 90% of the growth in population projected to take place in Mendocino County over this period. This represents a significant demographic shift in such a short period of time. This shift is illustrated in Figure 1, which graphically displays the percentage distribution in 2007 to the percentage distribution in 2015.

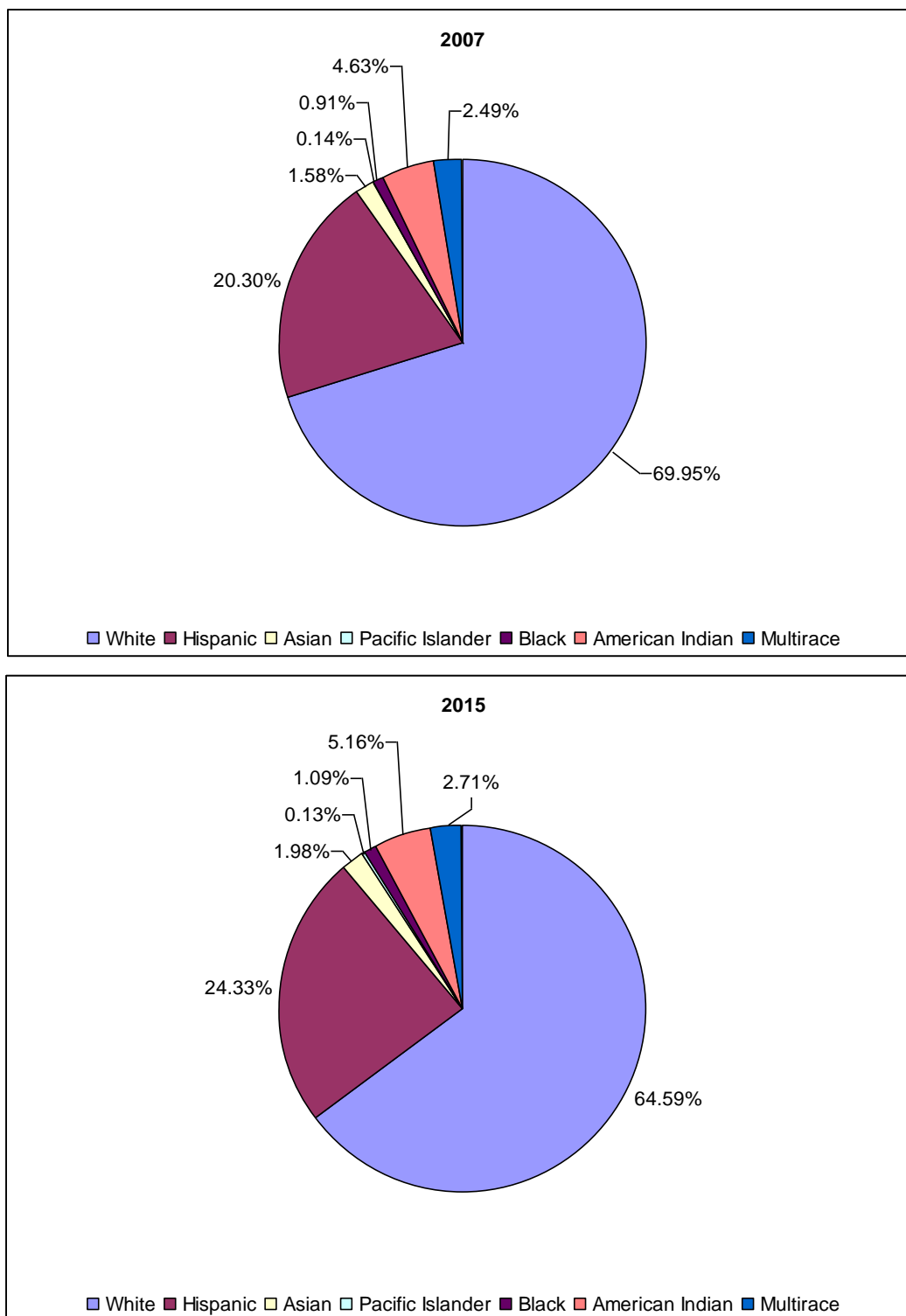


Figure 1: Mendocino County population projections by ethnicity, 2007 and 2015. Source: California Dept. of Finance

17 – 26 Year Olds in Mendocino County

The key demographic group for Mendocino College consists of people who are between the ages of 17 and 26 years old. They represent the most likely “pool” of new students for Mendocino College. Tables 3A and 3B present a projected breakdown of this age group, by ethnicity for the period from 2007 – 2015.

Year	White	Hispanic	Asian	Pacific Islander	Black	American Indian	Multirace
2007	9,096	3,387	286	21	96	750	468
2008	9,199	3,447	296	22	103	777	480
2009	9,102	3,509	295	23	110	790	476
2010	8,782	3,594	292	22	119	791	460
2011	8,453	3,676	291	21	131	804	452
2012	8,152	3,759	292	20	143	806	443
2013	7,832	3,828	300	20	159	807	431
2014	7,440	3,886	300	19	179	811	418
2015	7,121	3,915	302	20	199	797	405

Table 3A: Ethnic projections of 17 – 26 year olds, Mendocino County, 2007 – 2015.
Source: California Department of Finance

Year	White	Hispanic	Asian	Pacific Islander	Black	American Indian	Multirace
2007	64.49%	24.01%	2.03%	0.15%	0.68%	5.32%	3.32%
2008	64.22%	24.06%	2.07%	0.15%	0.72%	5.42%	3.35%
2009	63.63%	24.53%	2.06%	0.16%	0.77%	5.52%	3.33%
2010	62.46%	25.56%	2.08%	0.16%	0.85%	5.63%	3.27%
2011	61.13%	26.58%	2.10%	0.15%	0.95%	5.81%	3.27%
2012	59.88%	27.61%	2.14%	0.15%	1.05%	5.92%	3.25%
2013	58.55%	28.62%	2.24%	0.15%	1.19%	6.03%	3.22%
2014	57.00%	29.77%	2.30%	0.15%	1.37%	6.21%	3.20%
2015	55.81%	30.68%	2.37%	0.16%	1.56%	6.25%	3.17%

Table 3B: Ethnic projections of 17 – 26 year olds, Mendocino County, 2007 – 2015, expressed as percentages. Source: California Department of Finance.

Two trends which will affect Mendocino College need to be noted in this data. First, and most obvious, is that the transition to a greater proportion of Hispanic and, to a lesser extent, other underrepresented minorities is clearly evident. There is a shift of almost nine percentage points among ethnic groups over the 8 year period. Most marked is the increase in the proportion of the Hispanic population, from 3,387 to a projected 3,915, an increase of 528 or 15.6%. The second trend is the overall decline in the size of this cohort in Mendocino County, as shown in Figure 2.

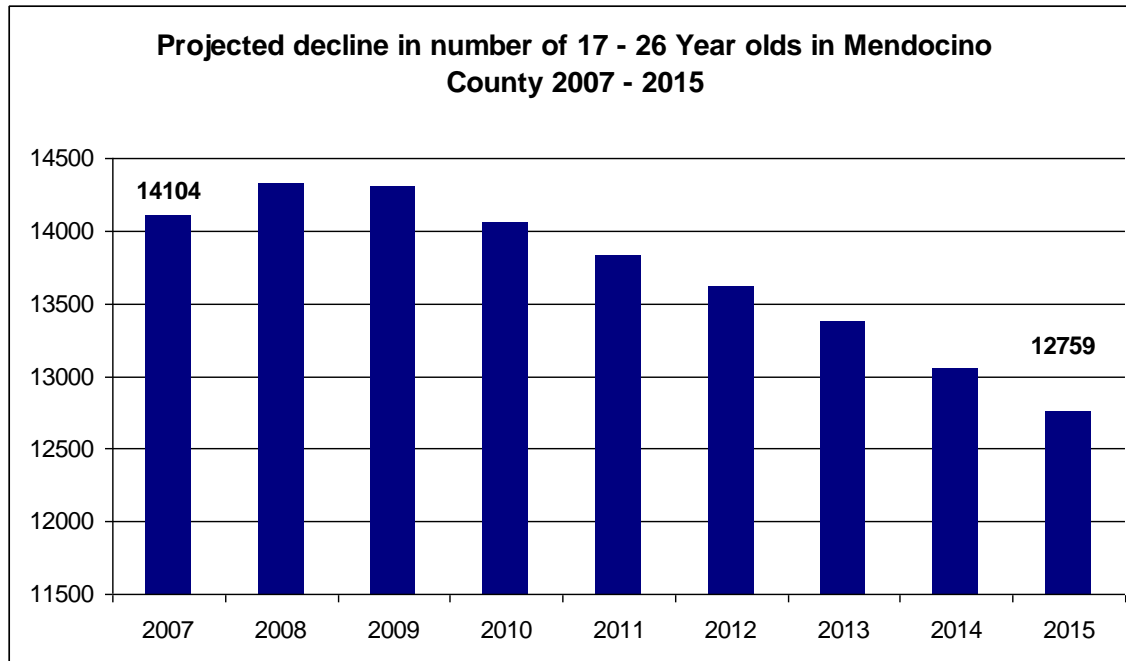


Figure 2: Projected decline in the 17 – 26 Year old cohort in Mendocino County; 2007 – 2015.

Overall, this cohort is expected to decline in size by about 1,345 people, or about 9.3% between 2007 and 2015 according to projections. The decline is driven by a decline of 1,975 people who identify themselves as White. It is only the growth in underrepresented minorities that mediates the trend. To maintain enrollment, as well as grow, Mendocino College will need to compete for a larger piece of a shrinking pie.

Lake County

The demographic change projected for Lake County is quite different than that projected for Mendocino County. In 2005, Lake County had a population of 63,250. Unlike Mendocino, Lake has experienced an average annual growth rate of about 1.55% over the past four years. Much of this has been a result of in-migration...people moving to Lake County from Napa and Sonoma County in search of more affordable housing. From 2000 through 2004, in migration rate into Lake County was twice and sometimes three times the rate of migration into Mendocino County. Overall, in the period between 2000 and 2007, Lake County population is estimated, by the California Department of Finance, to have grown by 5,951 people, with 16.9% of that growth situated in Clearlake, which is situated beyond the southern border of the District.

Lake is somewhat “younger” in its profile than Mendocino County. The largest single age group, as shown in Table 4A is the 41 -50 year old age group, with about 15.6% of the population. Population projections for Lake County are shown in Tables 4A and 4B.

Year	0 - 10	11 - 20	21 - 30	31 - 40	41 - 50	51 - 60	61 - 70	71 - 80	81+
2007	7,772	10,132	5,700	7,002	10,315	10,011	7,191	5,146	3005
2008	7,921	10,125	6,169	6,830	10,289	10,182	7,533	5,142	3055
2009	8,151	10,007	6,708	6,679	10,303	10,265	7,851	5,173	3109
2010	8,408	9,848	7,268	6,498	10,356	10,403	8,159	5,173	3146
2011	8,658	9,691	7,884	6,218	10,393	10,594	8,451	5,235	3175
2012	8,958	9,501	8,449	6,044	10,436	10,758	8,741	5,284	3178
2013	9,259	9,360	8,878	6,036	10,436	10,882	8,991	5,353	3200
2014	9,565	9,266	9,086	6,276	10,340	11,011	9,185	5,497	3210
2015	9,856	9,201	9,270	6,586	10,191	11,118	9,420	5,619	3221

Table 4A: Lake County population projections 2007-2015 by age group. Source: California Department of Finance.

Year	0 - 10	11 - 20	21 - 30	31 - 40	41 - 50	51 - 60	61 - 70	71 - 80	81+
2007	11.7%	15.3%	8.6%	10.6%	15.6%	15.1%	10.9%	7.8%	4.5%
2008	11.8%	15.1%	9.2%	10.2%	15.3%	15.1%	11.2%	7.6%	4.5%
2009	11.9%	14.7%	9.8%	9.8%	15.1%	15.0%	11.5%	7.6%	4.6%
2010	12.1%	14.2%	10.5%	9.4%	15.0%	15.0%	11.8%	7.5%	4.5%
2011	12.3%	13.8%	11.2%	8.8%	14.8%	15.1%	12.0%	7.4%	4.5%
2012	12.6%	13.3%	11.8%	8.5%	14.6%	15.1%	12.3%	7.4%	4.5%
2013	12.8%	12.9%	12.3%	8.3%	14.4%	15.0%	12.4%	7.4%	4.4%
2014	13.0%	12.6%	12.4%	8.5%	14.1%	15.0%	12.5%	7.5%	4.4%
2015	13.2%	12.4%	12.4%	8.8%	13.7%	14.9%	12.6%	7.5%	4.3%

Table 4B. Lake County population projections 2007-2015 by age group, expressed as percentage of the total County population. Source: California Department of Finance.

Over the period of 2007 – 2015, the Lake County population is projected to grow by 8,208 people, an increase of 12.38%. While most age groups show growth, as a result of continued migration, the largest growth is in the 21 – 30 age group. This segment of the population is expected to grow by more than 3,500 people, a projected increase of 62.63%. However, it is projected that this growth will not supplant older segments of the population (51 – 60 and 41 – 50) as the largest demographic groups.

From the perspective of ethnicity, projections for Lake County projections describe a demographic shift similar to that projected for Mendocino County. Over the period of 2007 – 2015, as shown in Tables 5A and 5B, there is a projected decline in the proportion of the population describing themselves as White and an increase in the proportion of Hispanic. The demographic shift is not as sharp as in Mendocino County, because of the projected growth in the segment of the population identifying themselves as American Indian.

Year	White	Hispanic	Asian	Pacific Islander	Black	American Indian	Multirace
2007	49,662	9,795	617	94	1,833	2,650	1,623
2008	49,936	10,195	636	94	1,908	2,816	1,661
2009	50,222	10,601	655	94	1,989	2,985	1,700
2010	50,509	11,011	674	94	2,067	3,159	1,745
2011	50,803	11,430	692	94	2,151	3,339	1,790
2012	51,097	11,853	710	94	2,233	3,524	1,838
2013	51,382	12,281	727	94	2,317	3,709	1,885
2014	51,665	12,705	743	94	2,402	3,897	1,930
2015	51,941	13,133	761	94	2,488	4,088	1,977

Table 5A: Lake County population projections by ethnic identification, 2007 – 2015. Source: California Department of Finance

Year	White	Hispanic	Asian	Pacific Islander	Black	American Indian	Multirace
2007	74.9%	14.8%	0.9%	0.1%	2.8%	4.0%	2.4%
2008	74.3%	15.2%	0.9%	0.1%	2.8%	4.2%	2.5%
2009	73.6%	15.5%	1.0%	0.1%	2.9%	4.4%	2.5%
2010	72.9%	15.9%	1.0%	0.1%	3.0%	4.6%	2.5%
2011	72.3%	16.3%	1.0%	0.1%	3.1%	4.7%	2.5%
2012	71.6%	16.6%	1.0%	0.1%	3.1%	4.9%	2.6%
2013	71.0%	17.0%	1.0%	0.1%	3.2%	5.1%	2.6%
2014	70.4%	17.3%	1.0%	0.1%	3.3%	5.3%	2.6%
2015	69.7%	17.6%	1.0%	0.1%	3.3%	5.5%	2.7%

Table 5B: Mendocino County population projections by ethnic identification, 2007 – 2015, expressed as a percentage of the population. Source: California Department of Finance.

Tables 5A and 5B portray an interesting projection. Population growth in Lake County is projected across all ethnic groups, other than Pacific Islander. Unlike Mendocino County, the segment of the population identifying themselves as White is projected to grow by 2,279 people from 2007-2015, a growth rate of 4.6%. However, this growth is less than the projected growth in the entire population of the county (12.4%) and growth within other ethnic groups, as shown in Figure 2. Projected growth rates are largest for the American Indian population (54.3%), the Black population (35.7%) and the Hispanic population (34.1%). All are well in excess of the projected overall growth of 12.4%.

A further consequence of the projected growth is a broader demographic shift in population than seen in Mendocino County. The overall percentage of the population in Lake County which identifies as White drops from 74.9% to 69.7%. However, due to across the board population growth, the percentage of the population identified as Hispanic grows slightly less in Lake County than in Mendocino County. In Mendocino County, the portion of the population identified as Hispanic is projected to grow from 20.3% to 24.33%. This is a shift of 4.03 percentage points. In Lake County, the proportion of the population identified as Hispanic is projected to shift from 14.8% to 17.6%, a shift of only 2.8 percentage points. The demographic shift in Lake County is mediated by a marked growth in the American Indian segment of the population, from

4.0% to 5.5%. This increase of 1.5 percentage points is about three times that projected for the same segment of the population in Mendocino County.

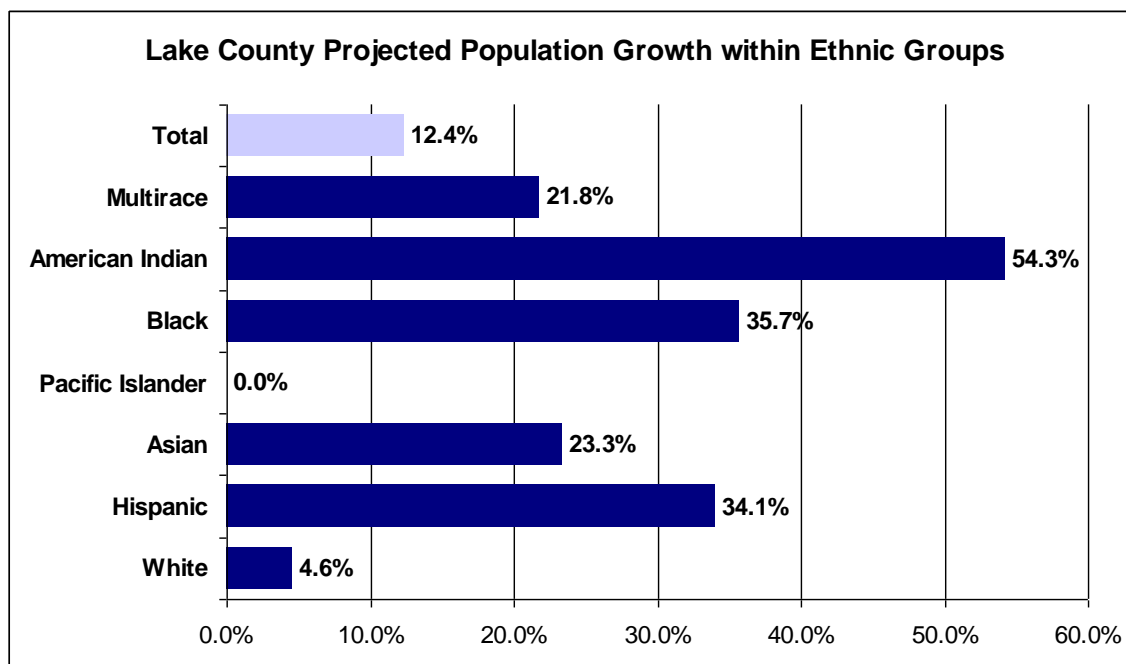


Figure 2: Lake County projected growth rates by ethnic groups, 2007 - 2015

17 – 26 Year Olds in Lake County

The key demographic group to examine consists of people who are between the ages of 17 and 26 years old. They represent the most likely “pool” of new students for Mendocino College. Tables 6A and 6B present a breakdown of this age group, by ethnicity for the period from 2007 – 2015 for Lake County.

Year	White	Hispanic	Asian	Pacific Islander	Black	American Indian	Multirace	Total
2007	5,841	1,469	67	15	254	441	301	8,388
2008	6,206	1,590	70	17	270	485	315	8,953
2009	6,455	1,715	67	16	281	521	327	9,382
2010	6,532	1,819	63	17	295	541	323	9,590
2011	6,602	1,907	62	17	311	564	311	9,774
2012	6,588	1,979	57	15	326	580	311	9,856
2013	6,554	2,038	57	14	337	601	296	9,897
2014	6,481	2,090	57	11	339	623	289	9,890
2015	6,330	2,108	54	11	348	632	289	9,772

Table 6A: Ethnic projections of 17 – 26 year olds, Mendocino County, 2007 – 2015.
Source: California Department of Finance

Year	White	Hispanic	Asian	Pacific Islander	Black	American Indian	Multirace
2007	69.64%	17.51%	0.80%	0.18%	3.03%	5.26%	3.59%
2008	69.32%	17.76%	0.78%	0.19%	3.02%	5.42%	3.52%
2009	68.80%	18.28%	0.71%	0.17%	3.00%	5.55%	3.49%
2010	68.11%	18.97%	0.66%	0.18%	3.08%	5.64%	3.37%
2011	67.55%	19.51%	0.63%	0.17%	3.18%	5.77%	3.18%
2012	66.84%	20.08%	0.58%	0.15%	3.31%	5.88%	3.16%
2013	66.22%	20.59%	0.58%	0.14%	3.41%	6.07%	2.99%
2014	65.53%	21.13%	0.58%	0.11%	3.43%	6.30%	2.92%
2015	64.78%	21.57%	0.55%	0.11%	3.56%	6.47%	2.96%

Table 6B: Ethnic projections of 17 – 26 year olds, Mendocino County, 2007 – 2015, expressed as percentages. Source: California Department of Finance.

For Lake County, this key age group is expected to grow by about 16.5%, from an estimate of 8,388 in 2007 to a projected size of 9,772 in 2015. Overall, this is a projected growth of 1,384 people. The growth in this particular age cohort is fairly reflective of the population of Lake County overall. The largest growth is projected for Hispanic 17 – 26 year olds (639), followed by White (489) and American Indian (191).

Population Summary

The most important feature of the projected population changes from 2007 through 2015 is the change in the population cohort aged 17 – 26. As stated earlier, this is a critical age group for recruitment of students at Mendocino College. Overall, the net loss of population in this cohort in Mendocino County is offset by the growth in population in Lake County, resulting in virtually no net change (39 people) over the period. This is shown in Tables 7A and 7B.

Year	White	Hispanic	Asian	Pacific Islander	Black	American Indian	Multirace	Total
2007	14,937	4,856	353	36	350	1,191	769	22,492
2008	15,405	5,037	366	39	373	1,262	795	23,277
2009	15,557	5,224	362	39	391	1,311	803	23,687
2010	15,314	5,413	355	39	414	1,332	783	23,650
2011	15,055	5,583	353	38	442	1,368	763	23,602
2012	14,740	5,738	349	35	469	1,386	754	23,471
2013	14,386	5,866	357	34	496	1,408	727	23,274
2014	13,921	5,976	357	30	518	1,434	707	22,943
2015	13,451	6,023	356	31	547	1,429	694	22,531
Net Change	-1486	1167	3	-5	197	238	-75	39

Table 7A: Population projections for 17-26 cohort, Mendocino and Lake combined, 2007 - 2015

Overall, the segment of the 17 - 26 cohort identifying themselves as White is projected to have a decrease of 1,486 people over the period in question,. This is a net decline of

9.95%. This decline is offset by the projected growth in the Hispanic population of 1,167, a 24% growth. Also playing a role, but to a lesser extent, is the growth in the American Indian population.

The importance of this projection is underscored by our current distribution of students in this age group. In Fall, 2006, 70.2% of students in this age group were residents of Mendocino County and 21.4% were residents of Lake County. With a shrinking pool in Mendocino County, we will need to revisit efforts to attract and retain students from Lake County. In general, Mendocino College underserves Lake County. While Lake County comprised 41.28% of the population in the District in 2005, only 20.8% of all students in Fall 2006 called Lake County home.

Year	White	Hispanic	Asian	Pacific Islander	Black	American Indian	Multirace
2007	66.41%	21.59%	1.57%	0.16%	1.56%	5.30%	3.42%
2008	66.18%	21.64%	1.57%	0.17%	1.60%	5.42%	3.42%
2009	65.68%	22.05%	1.53%	0.16%	1.65%	5.53%	3.39%
2010	64.75%	22.89%	1.50%	0.16%	1.75%	5.63%	3.31%
2011	63.79%	23.65%	1.50%	0.16%	1.87%	5.80%	3.23%
2012	62.80%	24.45%	1.49%	0.15%	2.00%	5.91%	3.21%
2013	61.81%	25.20%	1.53%	0.15%	2.13%	6.05%	3.12%
2014	60.68%	26.05%	1.56%	0.13%	2.26%	6.25%	3.08%
2015	59.70%	26.73%	1.58%	0.14%	2.43%	6.34%	3.08%
Net Change	-6.7%	5.1%	0.0%	0.0%	0.9%	1.0%	-0.3%

Table 7B: Population projections for 17-26 cohort, Mendocino and Lake combined, expressed as a percentage of the cohort, 2007 - 2015

In terms of the demographic shift, Table 7B shows that the combined population of the district, in the 17-26 cohort reflects the overall shift of the population. In other words, those people who identify themselves as White drop by 6.7 percentage points over the 2007 – 2015 timeframe. This drop is offset by an increase of 5.1 percentage points for Hispanics and one percentage point among American Indians.

There are several implications for Mendocino College. First, the shrinking 17 – 26 year old cohort means that our principal pool of traditional college age students is diminishing. The group experiences near zero growth over the 2007 – 2015 projection as a consequence of growth in Lake County. However, Lake County residents comprised about 21% of Mendocino College students in that age category in Fall 2006, compared to 70% from Mendocino County. Second, the cohort itself is changing dramatically. There is likely to be an increased demand for English as a Second Language (ESL) due to the growth of the Hispanic population and an increased demand for other Basic Skills courses.

Third, in terms of age, there will continue to be a substantial older population in the district over the time period. According to projections, the age group 61 – 70 will likely

have a larger proportion of the population in 2015. It is projected to constitute 12.8% of the population in 2015 compared to 10.1% in 2007, an increase of 2.7 percentage points. Ethnically, this group is projected to remain fairly stable over time, with more than 83% of the population identifying themselves as White, 8.9% identifying themselves as Hispanic and 3.2% identifying as American Indian in 2015. This is a shift of a mere 2.6 percentage points for this age group.

Education

Characteristics of the K-12 education system in Lake and Mendocino counties, and Mendocino College's relationship to it are important considerations in scanning the external environment. As with the population, Mendocino County and Lake County are slightly different. In Mendocino County, according to the California Department of Education, the total number of students in K-12 has declined from 15,963 in 1996-97 to 13,688 in 2006-07. By comparison, the overall K-12 population in Lake County is virtually unchanged, dropping ever so slightly from 10,187 in 1996-97 to 10,091 in 2006-07. Within the overall picture, a particular trend suggests that the actual number of graduates will decline over the next decade, as shown in Table 8, which looks at enrollments at several key points.

Grade Level	Mendocino	Lake	Total
12 th Grade	1,093	754	1,847
7 th Grade	1,058	771	1,829
1 st Grade	934	734	1,668

Table 8: K-12 Enrollments in Mendocino and Lake Counties, 2006-07. Source: California Dept. of Education

What Table 8 portrays is the shrinking enrollments in K-12 in Mendocino County and, to a lesser extent in Lake County. Based upon these statistics, we can expect a modest decline of about 3.5% in the number of graduates from Mendocino County schools in 2011, when the 7th grade cohort graduates. This will be offset somewhat by a modest increase in the cohort in Lake County. However, further out in 2018, the current 1st grade cohort will be graduating. Based upon current enrollments, this would be a decline of 14.5% over current enrollments.

While current enrollments tell us about the prospective pool of new students, the "capture rate" tells us how well Mendocino College is doing in terms of recruiting new students from this group. This is an important group because there is a greater tendency for them to be full-time students. For example, in Fall 2006, first time students who graduated from high school the previous year had an average load of 14.8 units at First Census; 50% of them carried 12 units or more. Table 9 illustrates the trends in "capture rate" for graduates of public and private high schools in Mendocino and Lake counties combined.

Year	All HS Grads	Higher Ed	Mendocino College	Mendocino Capture Rate	All CCC Capture Rate
1996	1,066	532	269	0.252	0.363
1997	1,101	513	254	0.231	0.347
1998	1,094	507	252	0.230	0.329
1999	1,152	531	267	0.232	0.304
2000	1,227	573	286	0.233	0.306
2001	1,164	523	311	0.267	0.313
2002	1,283	626	268	0.209	0.331
2003	1,207	587	290	0.240	0.296
2004	1,273	629	319	0.251	0.320
2005	1,225	601	341	0.278	0.298

Table 9: Capture rates for Mendocino College and All community colleges, 1996 – 2005 .Source: California Postsecondary Education Commission (CPEC)

According to the CPEC data for capture rate in Table 9, the average capture rate (the percentage of in-district high school graduates attending Mendocino College the following year) has been fairly steady. Over the ten-year period, the average capture rate is .242 (24.2%), ranging from a low of .209 in 2002 to a high of .278 in 2005. Generally, the capture rate for Mendocino College has been considerably less than the Statewide capture rate for all community colleges. For all California community colleges, the average capture rate has been .321, a gap of .071.

In the most recent year, 2005, the gap has narrowed significantly, from both ends. The capture rate for Mendocino College jumped from .251 to .278, an increase of 11.1%. At the same time, the capture rate for all community colleges in California declined by 6.9%, from .320 to .298. Given the number of students who graduated from district high schools in 2005 (1,225), the difference between the College capture rate and the Statewide capture rate translates to 24 additional students.

When the two counties that compose the District are disaggregated, we again find that significant differences exist between the capture rate for the portion of Mendocino County and the capture rate for the portion of Lake County, as shown in Figure 3.

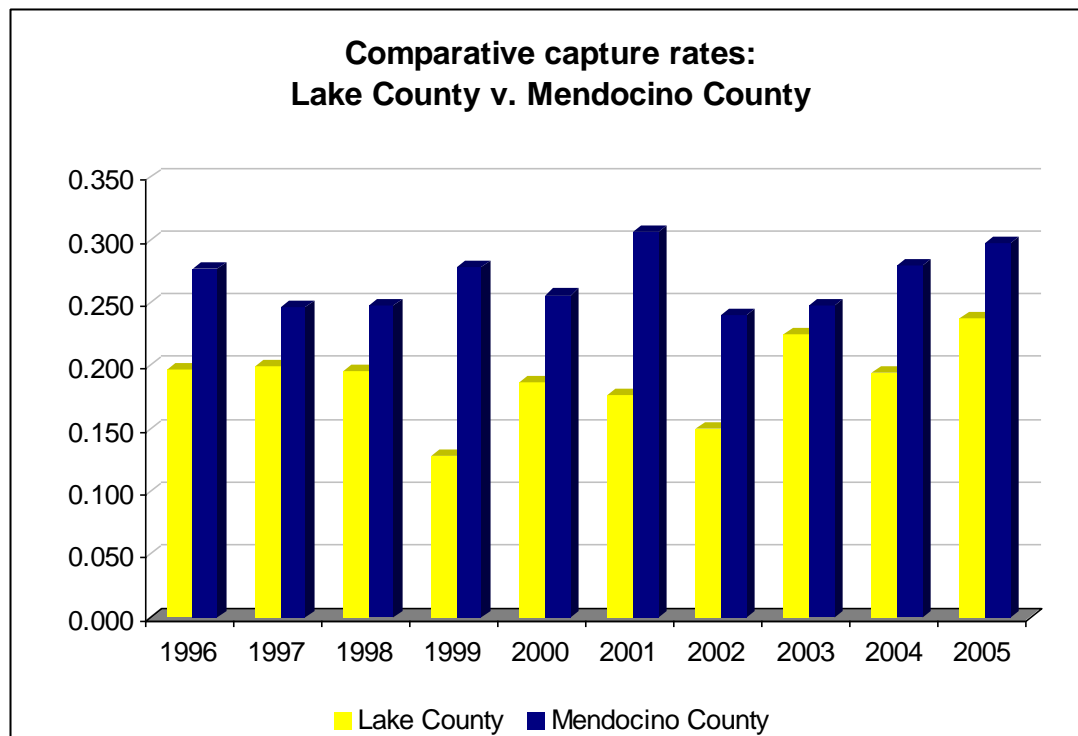
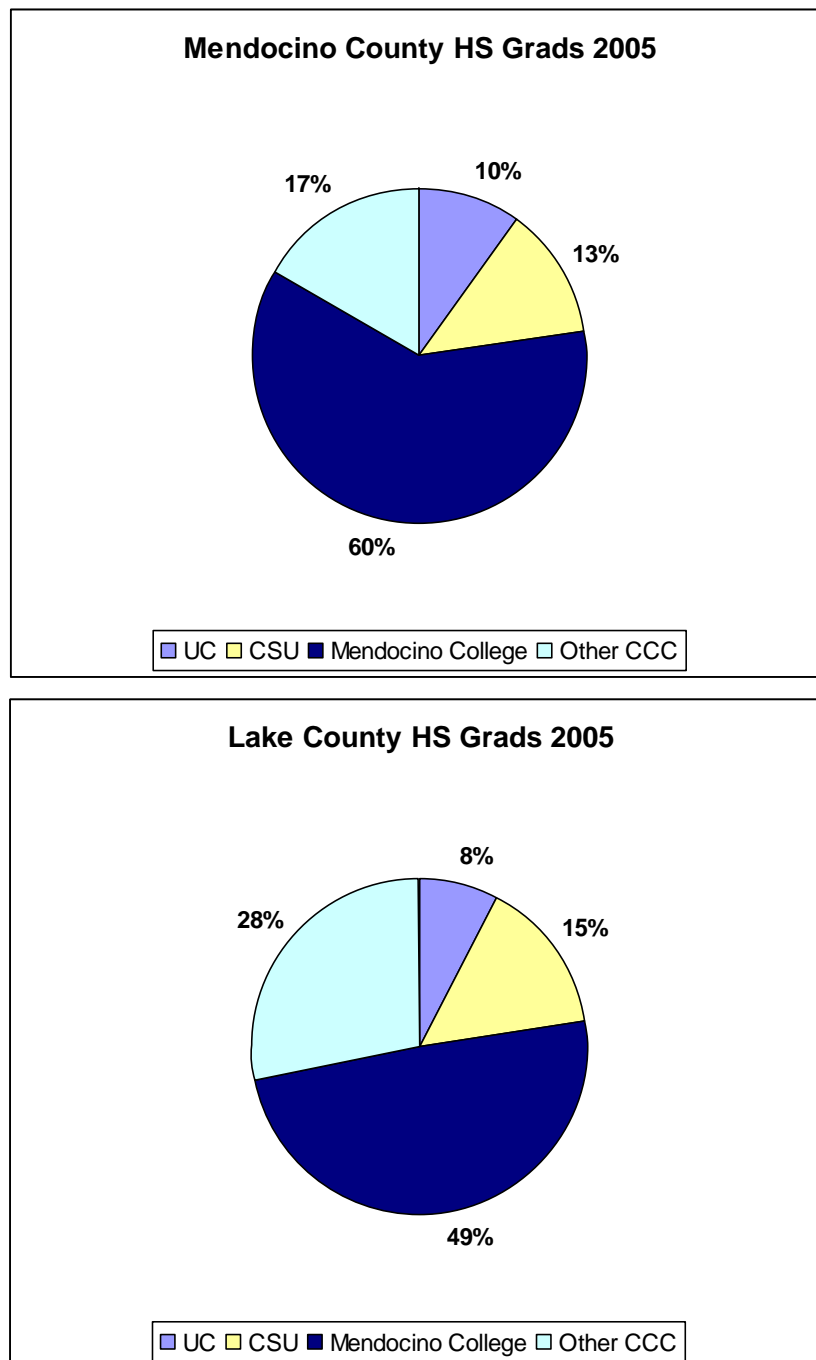


Figure 3: Capture rates for Mendocino County and Lake County High School graduates, 1996 – 2005. Source: CPEC

From 1996 through 2005, the capture rate from high schools, both public and private, in Mendocino County has averaged .267; that is, about 26.7% of high school graduates go directly to Mendocino College. The annual fluctuation has been within a fairly narrow band, with a low of .240 in 2002, following a high of .306 in 2001. For Lake County the average capture rate has been .188, with a low point of .149 in 2002 and the high point of .237 in 2005. Since 2002, the capture rate from high schools in the district has been trending upward for both Mendocino County and Lake County areas served by the College.

Another aspect to consider is the extent to which Mendocino College is the “provider of choice” for high school students who go directly into higher education. Over the past ten years, Mendocino College has been the “provider of choice” for 50.9% of all high school graduates in the District going on to higher education. In the most recent year, 2005, that percentage was 56.7%, up from 50.7% the prior year. Conversely, statewide, community colleges have been the “provider of choice” for about 64.7% of all high school students going on to higher education. As with the capture rate, the gap between Mendocino College and the statewide data has narrowed in 2005, with 61.9% of high school graduates selecting a community college as provider of choice, statewide.

Figures 4A and 4B give us further information on the higher education attendance patterns for Lake and Mendocino county high school graduates in 2005.



Figures 4A and 4B: Where high school graduates go on to higher education; Mendocino and Lake County high school graduates, 2005. Source: CPEC

Focusing upon the population of Mendocino County high school graduates that go directly into higher education, the majority of students, 60%, go on to attend Mendocino College. Among the 26% of in-district high school graduates that attend other community colleges, 8 selected College of the Redwoods and 36 selected Santa Rosa Junior College.

Mendocino College, however, does not fare as well among Lake County high school graduates who go on to higher education. Only 49% of those students select Mendocino College compared to 28% who opt to attend another community college. Of that group, the largest number, 24, selected Santa Rosa Junior College and another 10 students selected Yuba College.

Current Labor Force and Employment Trends

Economic Indicators

Both Lake County and Mendocino County fall below State levels on key economic indicators. In Lake County, the civilian labor force declined 4.1% in 2005. Current work force is approximately 25,500 people. It is projected to expand to over 28,000 in 2015. For Mendocino County, the labor force is in excess of 41,700 people. This represents an increase of 4.1% after two declining years. It is projected to expand to 57,463 people in 2015. In both counties, the percent of the labor force that is employed is slightly less than the percentage for the State (94.5%)

According to the California Employment Development Department, seasonally unadjusted unemployment in Lake County in 2006 was 7.1%. For Mendocino County, the same statistic was 5.2%. Overall, the seasonally unadjusted unemployment for the State of California for 2006 was 4.9%.

In 2005, the US Dept of the Census estimates the nominal per capita income in Lake County was \$19,046 and the median family income was \$47,838. For Mendocino County, in the same year, nominal per capita income was \$22,487 and median family income was estimated to be \$47,838. In Mendocino County, 13.6% of all households fell below the Federal Poverty Line and 28.6% of all households with a Female head of household, no husband present, fell below the Poverty Line. Comparable estimates for Lake County were not available for 2005. However, another source pegs the percentage of families below the Federal Poverty Line in Lake County in 2003 at 14.8%¹. In all cases, these statistics are below the average for California, as summarized in Table 10.

¹ Center for Economic Development, California State University, Chico. *Lake County 2006 Economic and Demographic Profile*. Center for Economic Development, California State University, Chico. 2006.

Economic Indicator	Lake County	Mendocino County	California
Percent of Labor force Employed, 2005	90.6%	91.0%	94.5%
Nominal Per Capita Income	\$19,046	\$22,487	\$26,800
Median Household Income	\$47,838	\$47,643	\$61,476
Households below the Federal Poverty Line	14.8%	13.6%	10.3%
Households with Female Head of Household, no husband present, below the Federal Poverty Line	NA	28.6%	24.9%

Table 10: Summary of Economic Indicators for Lake County and Mendocino County. Various sources.

Labor Force

The Labor Force tells us where people in both counties are employed. Table 11 illustrates the percentage breakdown for both counties as of 2003. The statistics reflect the fact that, in both counties, the service industry and retail have eclipsed manufacturing, agriculture and other industries.

Sector	Lake N	Lake %	Mendocino N	Mendocino %
Agriculture & Mining	1,370	6.33%	2,938	6.01%
Construction	1,588	7.34%	3,318	6.78%
Manufacturing	473	2.19%	4,162	8.51%
Transp. & Public Utilities	827	3.82%	987	2.02%
Wholesale Trade	313	1.45%	872	1.78%
Retail Trade	2,737	12.65%	6,261	12.80%
Finance, Ins. & Real Estate	1,707	7.89%	3,240	6.62%
Services	5,885	27.19%	13,673	27.95%
Govt. & Public Admin	4,570	21.12%	7,783	15.91%
Tourism	2,172	10.04%	5,684	11.62%

Table 11: Labor Force distribution, by sector, Lake County and Mendocino County 2003. Source: US Department of Commerce, Bureau of Economic Analysis.

In both counties, the largest number of people is employed in the “Services” sector, which includes Education, health care and other social assistance agencies. In both Lake and Mendocino counties, that sector makes-up more than 27% of the work force. In each county, the next largest sector consists of people employed by government and public administration.

This sectoral breakdown is reflected in the major private employers for each county, as shown in Table 12. At least one third of the top ten private employers in each county are

within the Services sector (health care and social services). Other major private employers include gaming operations and resorts.

Rank	Lake County	Mendocino County
1	Konocti Harbor Resort & Spa	Ukiah Valley Medical Center
2	Shannon Ranches, Inc.	Farmers Fruit Express, Inc
3	Sutter Lakeside Hospital	Fetzer Tasting Room & Visitor Ctr.
4	Adobe Creek Packing Co.	Fetzer Vineyards
5	Adventist Health – Redbud	Hardwood
6	Mariani Dryers	Harwood Products, Inc
7	Redbud Community Hospital	Hopland Sho-Ka-Wah Casino
8	Robinson Rancheria	Laborers Hod Carriers Local
9	Bruno's Food Store	Mendocino Coast District Hospital
10	Evergreen Lakeport Healthcare	Mendocino Coast Social Services

Table 12: Top ten employers, by number of employees, 2005 in Lake County and Mendocino County. Source: California Employment Development Department

Future Employment Trends

A recent report by the Public Policy Institute of California (May, 2007) suggests that California is facing a looming shortage of college-educated individuals to fill the workforce. In the past, this gap has been filled by in-migration. However, due to economic factors in California (e.g. housing costs, energy costs) this supply will likely dwindle and California will need to look inward. To some extent, this is already the case for Lake County and Mendocino County. As shown in Table 13, Both Lake county and Mendocino County are substantially below California in the number of college-trained workers.

Education Level	Mendocino County	Lake County	District Total	California
Associate's Degree	4,523	3,091	7,614	1,657,058
BA/BS	7,165	3,087	10,252	3,847,654
Grad/Prof	4,530	1,855	6,385	2,047,999
Total	16,218	8,033	24,251	7,552,711
Total Pop	64,342	44,357	108,699	24,650,185
Percentage College Educated	25.2%	18.1%	22.3%	30.6%

Table 13: Number of college-educated adults age 18 or over in 2000. Source: US Dept. of Census

Sources from both the State of California and the Federal government project continued growth in the sectors where most people are currently employed. One occupation that all sources agree upon as a growth area for the North Coast region² is Registered Nurse.

² California statistics for employment and occupation for Lake and Mendocino counties are aggregated into a single "North Coast" region which also includes Del Norte and Humboldt counties. Federal statistical sources, such as the US Bureau of Labor Statistics do not prepare county level estimates, either.

According to the California Employment Development Department (CEDD), there will be an estimated average of 72 openings pre year for Registered Nurses in this region between 2002 and 2012.

Overall, CEDD projects about 15,600 new jobs in the North Coast region between 2002-2012 as a result of industry growth and another 26,100 openings from net replacements. However, the bulk of these openings are entry level and/or low skill occupations that require little beyond introductory on-the-job training from the employer. Most of these jobs are in retail trade, leisure and hospitality, manufacturing and construction.

Beyond Nursing, there are several occupations projected by CEDD which are considered “fast growing” in the North Coast region which will require an AA-level degree. The five fastest growing occupations requiring an associate degree are projected to be:

- Respiratory Therapist
- Environmental Science and Protection Technician
- Medical Records and Health Information Technician
- Computer Support Specialist
- Paralegal and Legal Assistant

Occupations which will have substantial growth between 2002 and 2021, and which require post-secondary vocational education are:

- Automotive Service and Technician
- Fitness Trainers and Aerobic Instructors
- Gaming Dealers
- Licensed Professional Nurses and Licensed Vocational Nurses
- Bus and Truck Mechanics and Diesel Engine Specialists

Summary

Overall, the external environment in which Mendocino College will be operating over the next 5 – 10 years presents a challenging picture. Some of the important points:

- Mendocino County has very slow population growth, only slightly more than replacement level; Lake is growing more rapidly through in-migration of people from Napa and Sonoma County.
- Mendocino County has a slightly older demographic profile than Lake County. This means that we will need to review our course offerings in each county to see how well our student profile matches the population profile.
- Both Mendocino County and Lake County will continue to experience a demographic shift in ethnic composition...a shrinking proportion of the White population and an increasing proportion of Hispanic and American Indian populations. The shift is projected to be more pronounced in Mendocino County than in Lake County
- The demographic shift will be evident in the 17 – 26 year old cohort; the prime cohort for first-time freshmen.
- The 17 – 26 year old cohort will experience a decline in size over the next 7 years. The decline is more precipitous in Mendocino County.
- In terms of education, Mendocino College's "capture rate" of graduating high school students in 2005 was much closer to that for all community colleges than in recent years. The capture rate in Lake County has been consistently lower than the capture rate in Mendocino County for the past ten years. For the past five years, the capture rate has tended to rise.
- Economically, both Lake and Mendocino counties have higher unemployment rates, lower per capita income, lower median household income and a work force with less education than State statistics.
- In terms of opportunities, labor force projections identify Nursing and Allied Health professions as fast growing occupations in the near future. This fits well with current employment patterns in Lake and Mendocino counties.