

College of Marin Environmental Scan For Educational Master Plan Development 2018-19

An environmental scan is a report of systematically gathered information about the external environment. Its purpose is to help identify potential opportunities and threats to the college that can be used to establish directions, goals and priorities. This report includes demographic, educational, economic, political/governmental, social/cultural, geographic, and technological information. Because 80% of COM credit students are from Marin County and COM is a basic aid district—funded by local property taxes—the report focuses heavily on Marin. It includes the larger Bay Area, the California Community College System, and state and federal issues and characteristics when it seems appropriate to the report’s purpose.

Marin County Demographics

Population Size and Growth

Population growth in the Bay Area is slowing, and Marin County has lost population.

Population Size

Although the specific make-up of the population matters, in general, the more people who live in the community where a community college is located, the larger the pool of potential students. The only Bay Area county with a population smaller than Marin’s is Napa (Table 1).

In addition to its relatively small size, Marin County hasn’t reached the population growth projected for 2020. It was expected to reach 275,400 people, 11.4% growth, between 2000 and 2020 (College of Marin, 2000). As the table below shows, the U.S. Census Bureau estimate of the number of Marin residents as of July 2016 is 260,651.

Table 1
Number of Residents by Bay Area County,
2016 Population Estimates

	Marin	Santa Clara	Alameda	Contra Costa	San Francisco	San Mateo	Sonoma	Solano	Napa
Residents	260,651	1,919,402	1,647,704	1,135,127	870,887	764,797	503,070	440,207	142,166

Source: U.S. Census Bureau Quick Facts, <https://www.census.gov/quickfacts/fact/table/US/PST045217>

Since 2010, the most populous Bay Area counties with the highest concentration of jobs have seen the most growth, specifically Alameda, San Francisco, San Mateo and Santa Clara. In Napa and Sonoma counties, growth had been slowing and that trajectory has continued (Association of Bay Area Governments [ABAG], 2015).

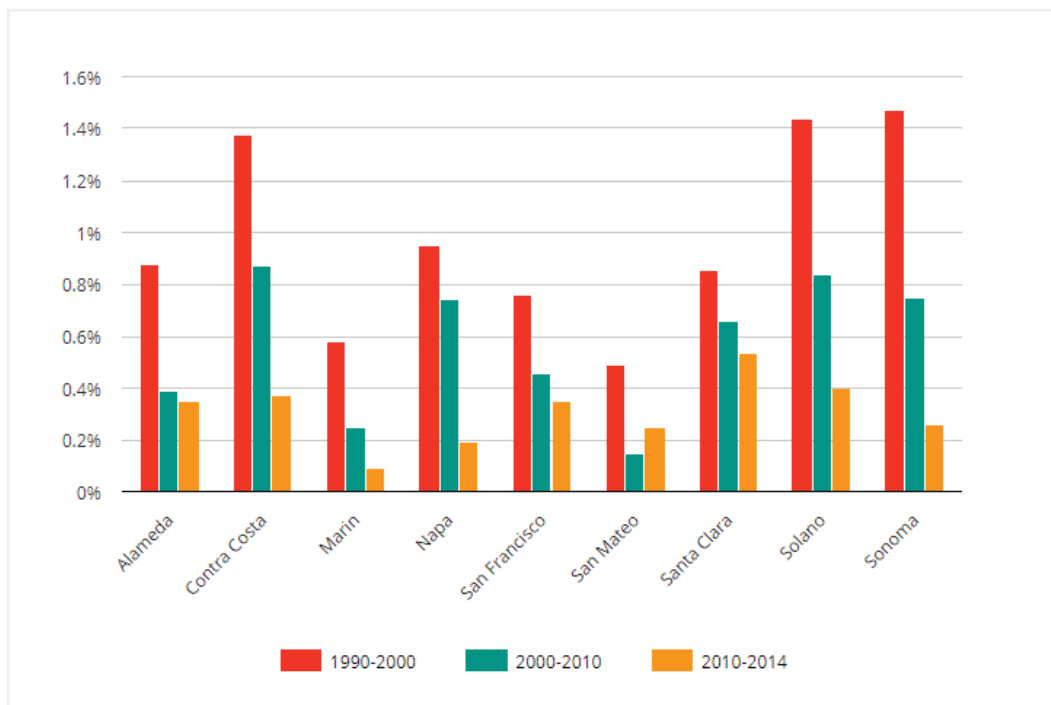
According to an article in *SFGate* (Alexander, 2017), between mid-2015 and mid-2016, the whole region’s growth slowed, suggesting that perhaps the allure of the Bay Area is fading.

Except for Solano County, more residents are moving out than in, though the population is remaining steady or growing slowly due to births and people moving in from abroad. Unlike the other Bay Area counties though, Marin County lost population during this period. Since 2017, 624 people have moved to Marin as a result of the Santa Rosa fires (Marin Economic Forum, May 15, 2018).

Household Growth

Household growth is the number of new households—dwellings in which the people living in them share meals or living arrangements—and is due to rising population or fewer adults per household. The age structure of the population (see page 10) and social and economic changes such as economic circumstances that make it difficult to move from one’s family home can influence both household growth rates and household size. Among Bay Area counties, from 1990-2010, only San Mateo’s annual household growth rate was lower than Marin’s (Figure 1) (ABAG, 2015). From 2010-2014, Marin’s household growth rate was by far the lowest. This reflects Marin’s lack of new housing and population growth.

Figure 1
Average Annual Household Growth Rate by County



Source: ABAG from California Department of Finance Table E-5 and E-8 data

Income, Wealth and Poverty

Per Capita Income

Marin County is more affluent than the other Bay Area counties. In 2000, Marin's per capita income was the highest in the state and increasing at a faster rate than the state and the Bay Area (College of Marin, 2000). In 2006, it was about \$31,000 more than for the Bay Area overall and more than twice as much as the per capita income for the state (Table 2) (Marin Economic Commission, 2009). This trend was projected to continue.

Marin County is wealthier than the Bay Area, California overall and the poverty rate is lower than all but San Mateo County. Economic inequality is among the widest.

Table 2

Per Capita Income in Marin County, Bay Area* and California: 1996, 2006, and 2016

		Total Personal Income	Net Earnings	Transfer Receipts	Income Maintenance	Unemployment Insurance	Retirement	Dividends/ Interest/ Rent
1996	Marin	49047	31723	2892	227	53	2612	14433
	Bay Area	34917	23813	3268	503	67	2698	7836
	California	25885	17433	3288	597	95	2595	5165
2006	Marin	91144	55286	5044	279	95	4671	30814
	Bay Area	61850	41802	5119	575	117	4426	14930
	California	42334	28900	5060	707	121	4232	8373
2016	Marin	115952	69959	8170	345	89	7736	37822
	Bay Area	84675	57414	8003	624	111	7267	19258
	California	56308	36101	8516	897	134	7486	11690

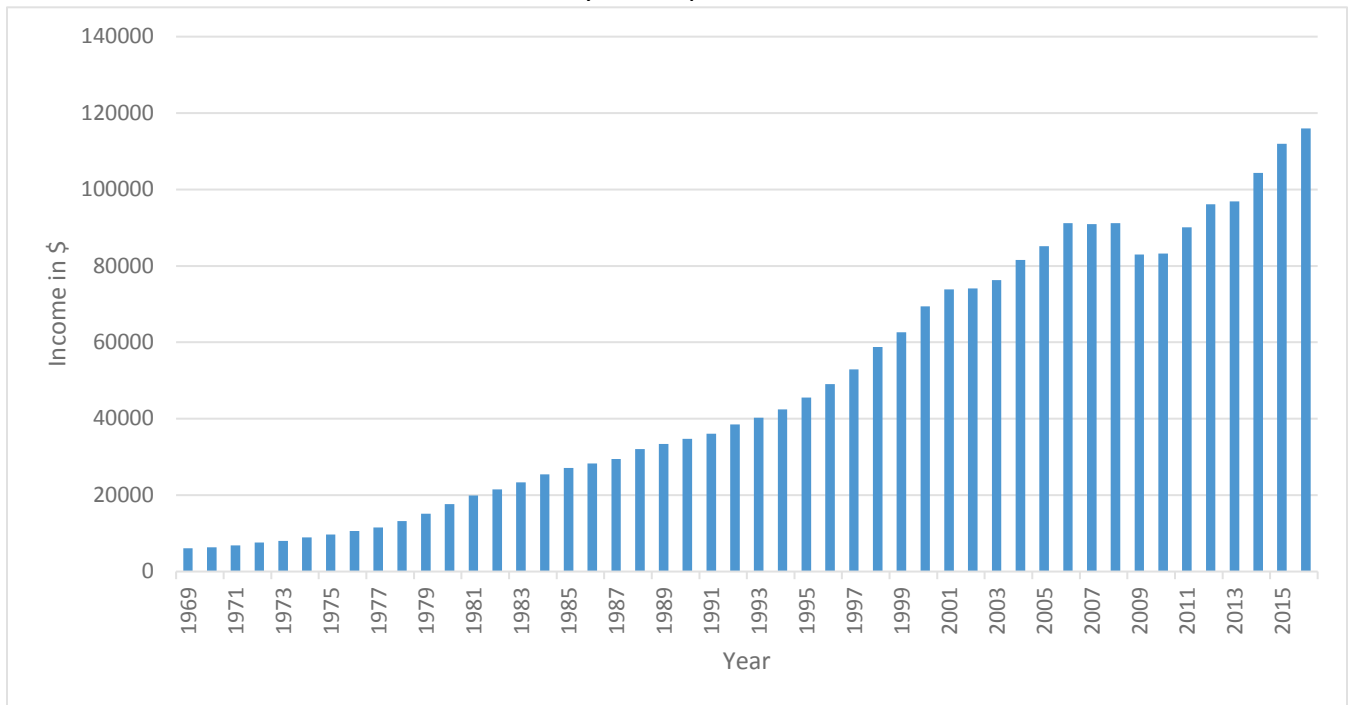
Source: U.S. Bureau of Economic Analysis, CA30 Economic Profile. Retrieved April 27, 2018.

*San Francisco-Oakland-Hayward, CA (Metropolitan Statistical Area) comprised of Alameda County, Contra Costa County, Marin County, San Francisco County, and San Mateo County

As the per capita income graph (Figure 2, page 4) shows, income in Marin dropped only once in about 50 years and that was in 2009 and 2010 during the most recent recession. Though per capita income has clearly rebounded, much of this seems to have to do with changes in the workforce.

More Marin residents now work outside of Marin for jobs that allow them to afford living here. Further, while jobs in Marin pay relatively well, they pay less than comparable jobs in urban parts of the Bay Area. Thus the commute pattern. (See Employment page 18 for more information). (Marin Economic Commission, 2009; Marin Economic Forum, 2016)

Figure 2
Marin County Per Capita Income



Source: Economic Research, The Federal Reserve Bank of St. Louis <https://fred.stlouisfed.org/series/PCPI06041>

Investment Income

Another pattern that may be relevant is the extent to which residents' wages is from investments—dividend, interest and rental income—rather than wages. In 1999, over 28% of Marin residents' per capita income was from investments compared to 19% for the Bay Area and 18% for CA overall (College of Marin, 2000). Currently, it's about 33% for Marin residents based on the Bureau of Economic Analysis data (Eyler, 2018). This high percent of income sources other than wages may affect how people deal with employment changes because wealth can help people span periods of unemployment. In addition, depending on the source of the investments, Marin may be more influenced by national market trends. According to Sonoma State economist Rob Eyler (2018), "the more held in equities, the more connected to national economic trends."

Poverty Rate

As one might expect, per capita income assistance from the government is lower in Marin than in the other Bay Area counties and the state as well. The poverty rate too is lower than all, except San Mateo County, and has been since at least 1980.

Table 3
Poverty Rates, 1980-2010

	1980	1990	2000	2010
United States	12.4	13.1	12.4	14.9
California	11.4	12.5	14.2	15.3
Marin	7.0	5.2	6.6	7.5
Alameda	11.3	10.6	11.0	12.0
Contra Costa	7.6	7.3	7.6	10.2
Napa	8.1	6.9	8.3	10.0
San Francisco	13.7	12.7	11.3	13.2
San Mateo	6.1	6.3	5.8	7.4
Santa Clara	7.1	7.5	7.5	9.7
Solano	9.4	7.5	8.3	11.9
Sonoma	9.5	7.6	8.1	11.5

Source: U.S. Census Bureau

According to a *Marin Independent Journal* article (Johnson, 2015), the poverty rate for Marin children under age 6 is considerably higher, 12.8%. A ballot measure in 2016 intended to raise the sales tax by a quarter-cent to benefit impoverished children through food, healthcare, education and daycare was defeated at the polls.

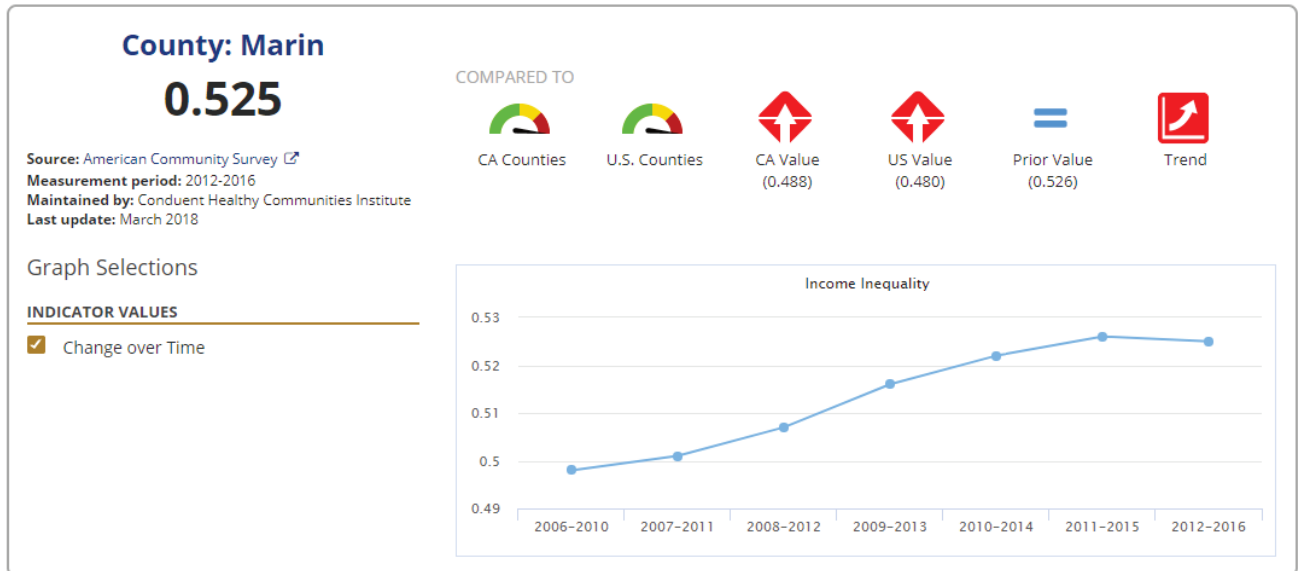
Poverty is also unequally distributed by race/ethnicity. According to Race Counts (n.d.-a), 5% of White residents live below the poverty line while about 35% of Native Americans do. Further, 9% of Asians live below the poverty level, 13% of people who identify as two or more races, 21% of Latinos, and 28% of Black residents.

Income Inequality

Marin is among the California counties with the greatest disparity in the economic status of its population and the gap has steadily widened (Healthy Marin, 2018) as it has in the U.S. overall over the last 30 years (Inequality.org, n.d.). California itself ranks 7th among states in its ratio of the average income of the top 1% of families to the average income of the bottom 99%. (Sommeiller, Price, & Wazeter, 2016).

Rising income inequality is a global concern and threat particularly within developed countries. Work and people’s ability to support themselves has political and social ramifications, most fundamentally anxiety and a sense of social unfairness. This can result in identity and community clashes, political and social polarization, and cross-border movement that can fuel conflict (World Economic Forum, 2018). In addition to this social instability and personal stress, economic inequality affects a population’s health, increasing illness and lowering lifespan (Healthy Marin, 2018), increases violent crime (Kelly, 2000) and is detrimental to economic growth (R.A., 2015).

Figure 3
Income Inequality in Marin County



Source: Healthy Marin, Community Dashboard, Income Inequality by County.

<http://www.healthymarin.org/indicators/index/view?indicatorId=288&localeId=258>. Retrieved 4/26/18.

Housing Affordability/Cost of Living

In PRIE’s survey of COM employees asking about external environment factors impacting the college, by far the most common response had to do with the high cost of living and lack of affordable housing in Marin.

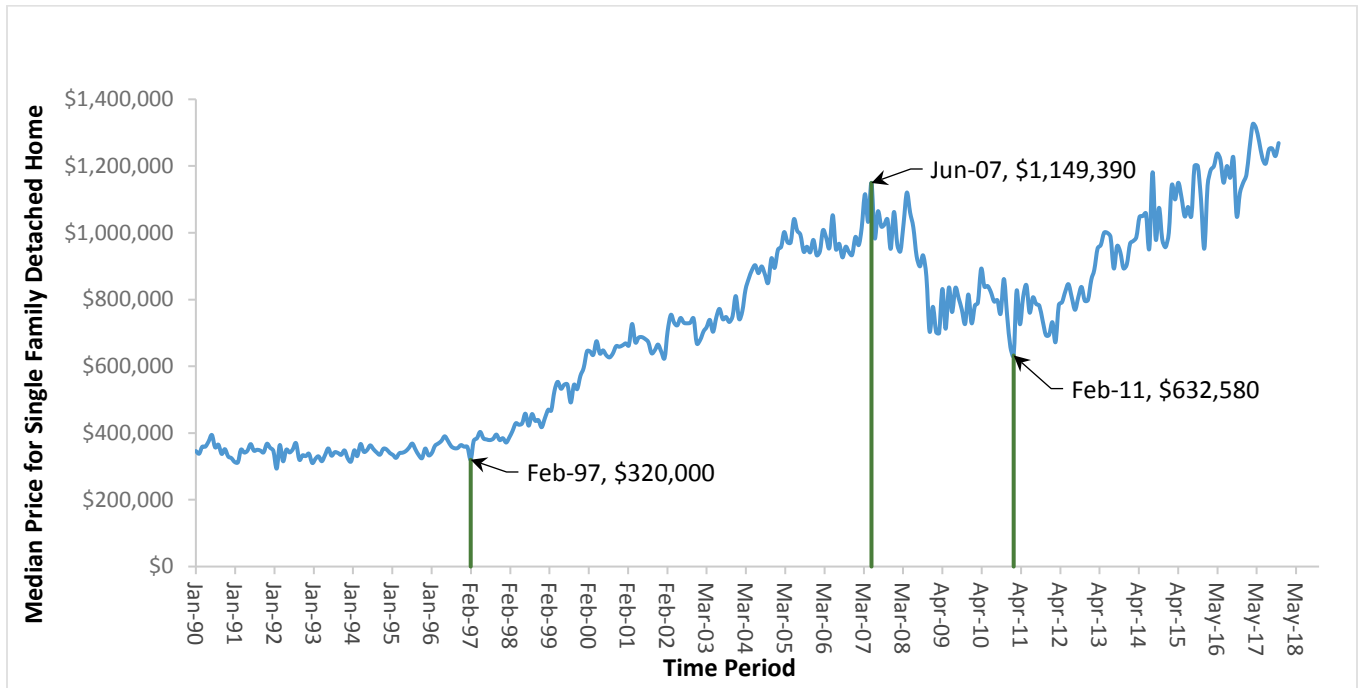
COM employees most commonly cite high cost of living and affordable housing as factors that impact the College.

An employee housing feasibility survey conducted in Spring 2018 showed the majority (66%) of COM faculty and staff are satisfied with their current housing, yet 54% expressed interest in COM-owned housing due to commute times. The consultants’ conclusion is that housing “does not seem to acutely affect retention of current faculty/staff” since only 20% expect to leave COM in the next 5 years and of those, 66% planned to retire. However, the cost of housing “is likely to hinder future faculty/staff recruitment” (Education Housing Partners, 2018).

Median Home Price

The median home price in Marin has surpassed \$1 million (Figure 4), far outstripping most people’s ability to buy. Even the median price for a condo is nearly \$700,000 (Paragon Real Estate Group [Paragon], 2018).

Figure 4
Marin County Median Home Price



Source: California Association of Realtors <https://www.car.org/en/marketdata/data/housingdata>

Rental Housing Prices

“Marin County had the third highest median rental price in the nation in February, after San Francisco and Suffolk County, N.Y., according to real estate website Zillow” (Hose, 2018).

“Median rents in San Rafael are \$2,580 for a one-bedroom apartment and \$3,240 for a two-bedroom. The rate of growth in San Rafael rental prices peaked in September and has hovered just below 2 percent since then, according to ApartmentList.com...During the same one-year period, rents in Novato grew 1.6 percent, edging up 0.6 percent in March. Median rents in Novato stand at \$2,680 for a one-bedroom apartment and \$3,370 for a two-bedroom” (Halstead, 2018).

“Sydney Bennet, a research associate with ApartmentList.com, said, the rate at which Marin rents are increasing has slowed somewhat because they are already quite high relative to many other areas of California and the nation. For example, Phoenix has a median two-bedroom rent of \$1,030, roughly a third of what it costs in San Rafael. The national average for a two-bedroom apartment is \$1,170” (ibid).

Childcare Cost and Availability

In Marin County, there is a shortage of childcare for infants and toddlers (0-18 months). The average cost for childcare in

Marin exceeds CSU tuition for a year. A family of four must earn over \$100,000 a year to afford infant and toddler care. Many families in Marin do not meet the self-sufficiency standards, yet do not qualify for state subsidized care. Families earning between \$50,000 and \$100,000 are in this category. Access to quality and affordable early childhood care and education remains elusive for many families in Marin.

In addition to housing, childcare and transportation costs contribute to the high cost of living.

Transportation

As previously stated, because the cost of living is so high in Marin, many of its workers live outside of the county and many residents commute to surrounding counties for higher paying jobs that allow them to afford to live in Marin. This makes commuting and transportation options important considerations. In fact, this was an issue that was commonly expressed by COM employees in the environmental scan survey.

In August 2017, the Sonoma-Marín Area Rail Transit (SMART) system began full service. Currently, the train runs from Sonoma County Airport and Santa Rosa to the San Rafael Transit Station with multiple stops at points between. Depending on distance travelled, regular one-way fares run from \$3.50 to \$11.50 per day. The maximum daily cost for all trips is \$23. Discounted fares for seniors, youth, and passengers with disabilities and a Clipper discount card are \$1.75 to \$5.75. The maximum cost is \$11.50 per day. Eventually, SMART will serve a 70-mile corridor between Cloverdale in northern Sonoma County and Larkspur Landing in Marin (<http://www.sonomamarintrain.org/>).

In addition to cost, commuting by train requires that a bus then be taken to the college. This makes the commute time very long. For those who drive from some of the other counties, bridge tolls add to the cost of commuting, as well as the stress of traffic congestion.

Residents' Education and Educational Options

Educational Attainment

Marin County is more highly educated than the rest of the Bay Area. The education level of a county's workforce influences the types of businesses that can be staffed locally and the types of education options needed or desired.

Marin County is more highly educated than the Bay Area. 57% of residents have a bachelor's degree or higher.

In 1980, 38% of Marin residents age 25 and older had a bachelor's degree or higher. By 2000, 51% had that level of education (Marin Economic Commission, 2009). Today, 57% do (Table 4). The next most highly educated county is San Francisco, at 55% then Santa Clara at 49%. The lowest is Solano at 25% and Napa and Sonoma at 33%.

Table 4
Percent of Bay Area County Residents by Educational Level,
2012-2016 Population Estimates

	Bachelor's Degree or Higher	High school Graduate or Higher
Marin	57.1	93.1
San Francisco	54.8	87.4
Santa Clara	49.1	87.1
San Mateo	47.1	88.6
Alameda	43.9	87.3
Contra Costa	40.3	89.1
Napa	33.0	83.9
Sonoma	33.1	87.2
Solano	25.1	87.5

Source: U.S. Census Bureau Quick Facts, <https://www.census.gov/quickfacts/fact/table/US/PST045217>

As Table 5 below shows, although Marin residents' education level has increased substantially, there is still a large number of people with less than an associate's degree. Currently, about 56,000 residents age 25 or older have a high school diploma or some college, but no degree. This may be a group that would be responsive to COM recruitment efforts.

Table 5
Marin Residents Age 25 Years and Over by Educational Level, 1990 - 2016

	1990		2000		2007		2012-2016	
	N	%	N	%	N	%	N	%
Less than 9 th Grade	6,586	3.5	6,455	3.5	8,136	4.5	7,360	3.9
9 th -12 th Grade, No Diploma	10,819	5.8	9,625	5.2	8,239	4.5	5,718	3.0
High School Diploma/GED	31,944	17.2	22,857	12.4	26,636	14.7	21,372	11.3
Some College, No Degree	47,023	25.3	39,211	21.3	31,588	17.4	35,221	18.6
Associate Degree	13,470	7.2	11,298	6.2	12,426	6.8	11,753	6.2
Bachelor's Degree	47,490	25.5	56,549	30.8	55,001	30.3	61,100	32.2
Graduate Degree	28,832	15.5	37,699	20.5	39,619	21.8	47,193	24.9
Total	186,164	100	183,694	100	181,645	100	189,717	100

Source: U.S. Census Bureau. 1990-2007 data are published in Marin Profile, Marin Economic Commission November 2009. 2012-2016 population estimates from U.S. Census Bureau American FactFinder, [Educational Attainment, 2012-2016 American Community Survey 5-Year Estimates table](#).

College Preparation

From 1996-97 through 2006-07 (Marin Economic Commission, 2009), Marin County student SAT Scores were consistently far higher than the state average (Table 6). California Department of Education data show this remains true today. Both Marin County's educational attainment level and preparation for higher education affects the educational options available to high school graduates and the types of educational experiences that may be needed or desired. (See pages 13 and 14 for more information on high school graduates' community college attendance).

Marin County high school student SAT scores are far higher than the state average.

Table 6

SAT Scores in Marin County and California, 1999-00 to 2015-16

		1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Marin County	Verbal/Reading* and Math	1108	1106	1100	1120	1118	1133	1126	1116	1119	1129	1142	1135	1118	1113	1119	1100	1088
	Writing**	--	--	--	--	--	--	561	555	559	566	570	569	559	556	556	548	539
California	Verbal/Reading* and Math	1009	1008	1006	1012	1015	1020	1011	1006	1007	1008	1021	1008	1001	1000	998	989	978
	Writing**	--	--	--	--	--	--	495	491	493	494	500	494	491	489	489	484	477

Source: California Department of Education. 1999-00 to 2006-07 data are published in Marin Profile, Marin Economic Commission November 2009. 2007-08 and forward data from California Department of Education DataQuest, [SAT Report by County Level](#). Retrieved 4/27/18.

*SAT Verbal was reworded to SAT Critical Reading after the 2006-07 academic year.

** The writing component was added to the SAT exam in the 2005-06 school year.

Marin County Population Age

Age

Marin County's population is the oldest in the Bay Area. A population's age affects schools, social services, workforce and the economy. It determines the need for schools, healthcare facilities as well as the composition of the workforce and, with a large number of senior citizens, potentially less disposable income. Although, given Marin's affluence, the latter may be an issue for only a subset of the older population.

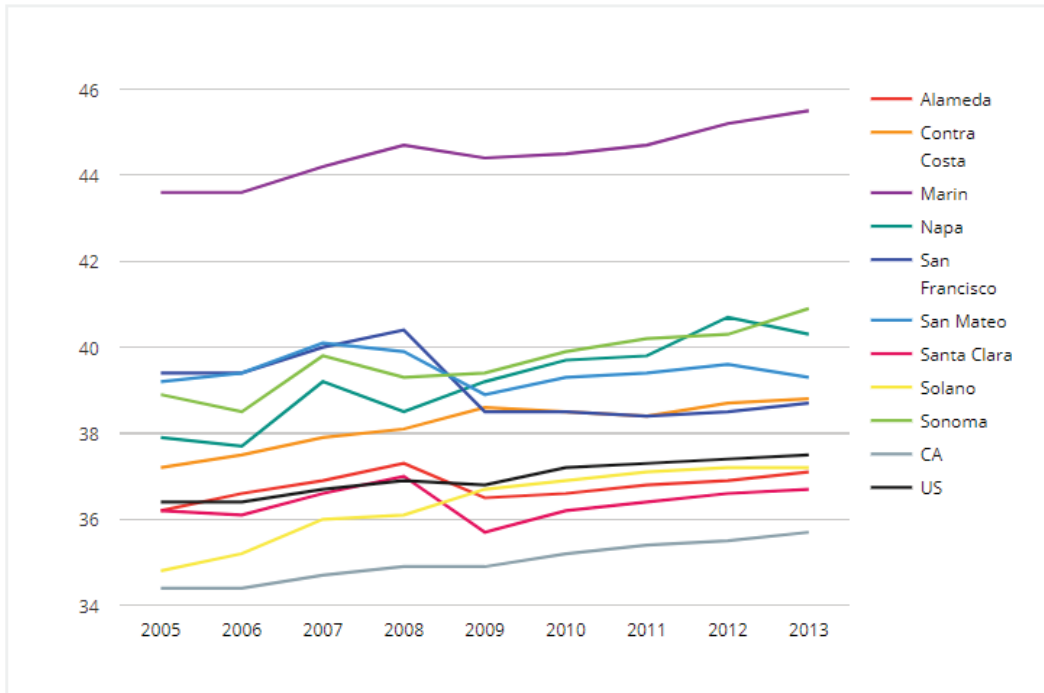
Marin County's population is far older than in the other Bay Area counties.

Median Age

In 1990, the median age in Marin was 38 years (College of Marin, 2000). Currently, it is nearly 46, far higher than the other Bay Area counties, the oldest of which is Sonoma at about 41. The median age in California is just below 36 (Figure 5) (ABAG, 2015).

Figure 5

Median Age, Bay Area Counties, California, and the United States (2005-2013)



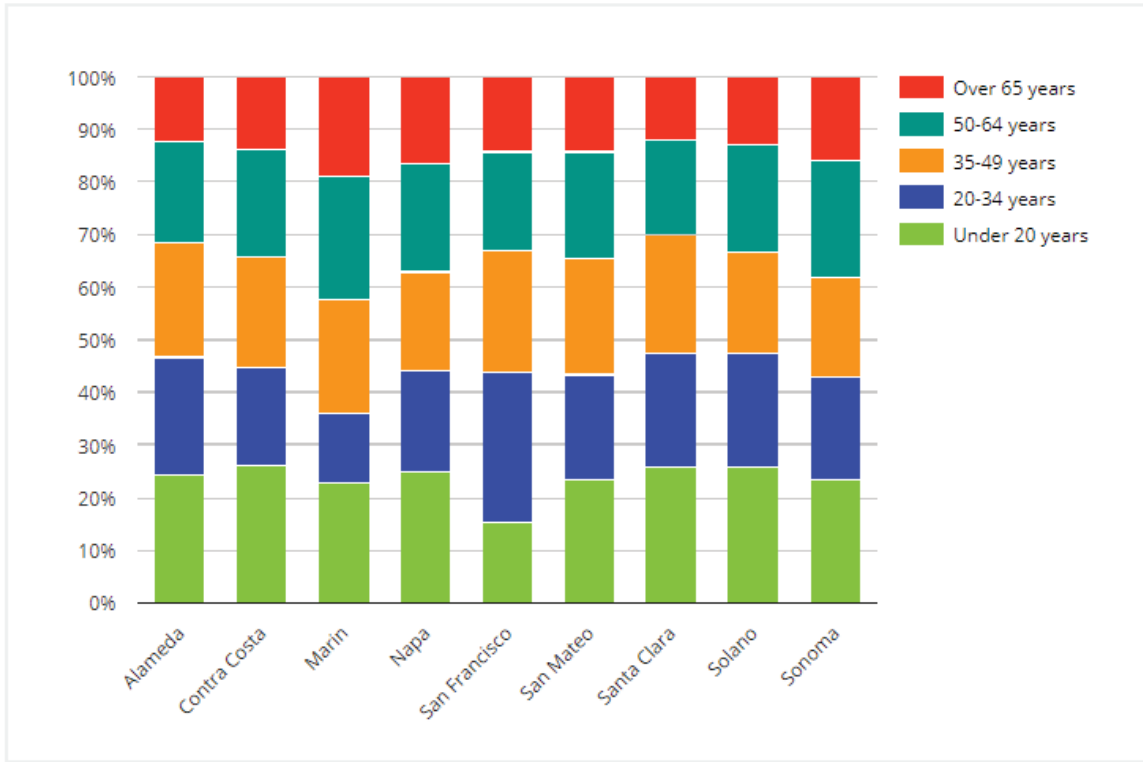
Source: ABAG from US Bureau of the Census American Community Survey 1-Year Estimates, 2005-2013

Young Adults

Between 1990 and 2008, the number and percentage of young adult Marin residents (age 18-34) declined by about 14,000 (Marin Economic Commission, 2009). This age group went from being 25% of the population to 17%. In 2013, those age 20-34 were by far the smallest age group in Marin and was much smaller than in the other Bay Area counties, including Sonoma (Figure 6) (ABAG, 2015). These are people typically in their higher education and child-bearing years. In Marin, the declining number of young adults reflects the high cost of living in the county and the relatively few high-paying entry-level jobs (College of Marin, 2000).

The number of young adults in Marin is declining.

Figure 6
Age Distribution by Bay Area County (2013)



Source: ABAG from US Bureau of the Census American Community Survey 1-Year Estimates

Adults and Children

During this same time period, the adult population (age 35-64) grew (Marin Economic Commission, 2009). In 2013, Marin’s population age 35-49 is about the same proportion as in other counties (Figure 6 above). Interestingly, and perhaps relevant to understanding how these patterns affect COM, at the same time, the number and percent of children remained relatively steady. This might suggest later childbirth, as is often the case among the highly educated.

Senior Citizens

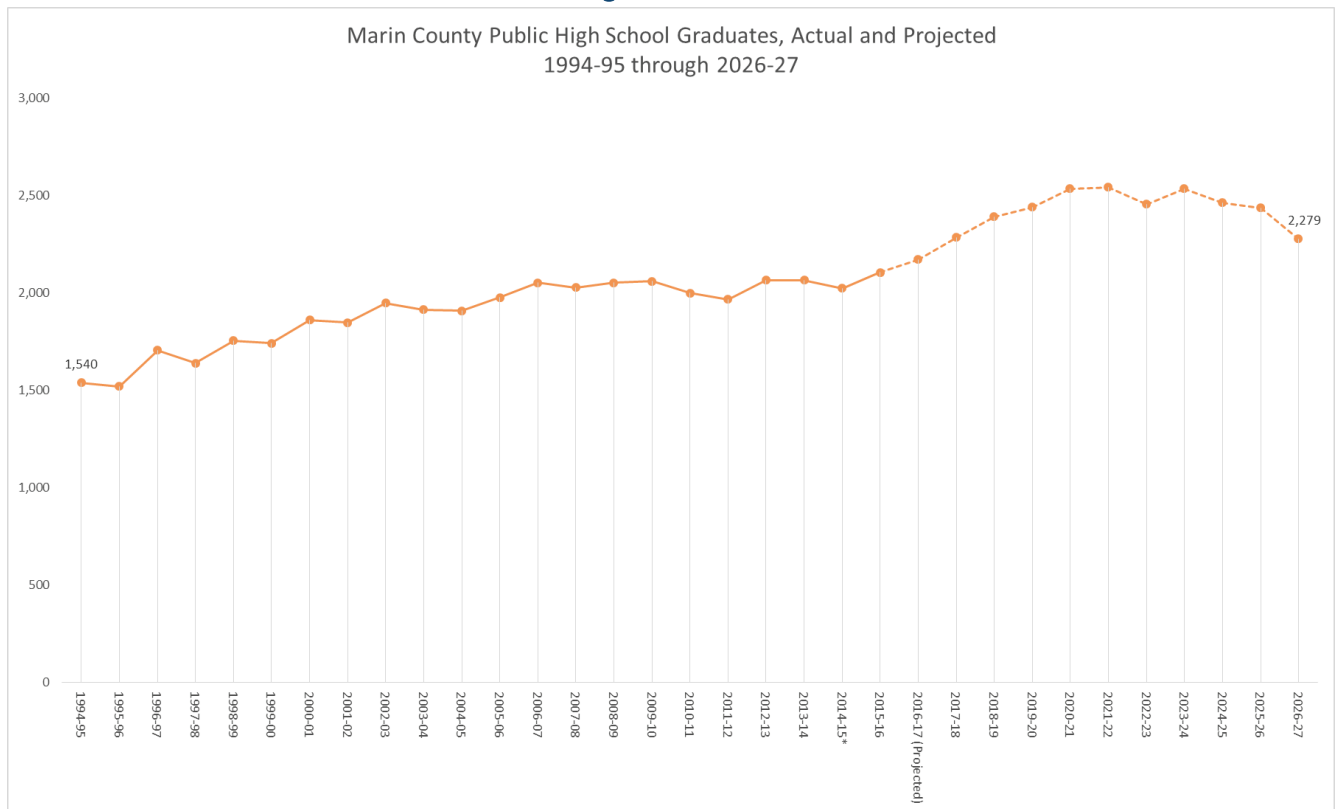
Marin residents age 65+ increased from 9.7% of the population in 1980, to 12% in 1990, 13.5% in 2000, 15% in 2008 (Marin Economic Commission, 2009) and is currently 21% (U.S. Census Bureau, 2016-a).

High School and Community College Enrollment

The number of high school graduates is not a good predictor of COM's enrollment.

One effect of the County's population age structure and high education level is that, unlike at most community colleges, the number of high school graduates in Marin County isn't a good predictor of COM's enrollment (Lapkoff & Gobalet, 2004). Though the number of high school graduates has steadily, though slightly, increased since 1995 (Figure 7), COM's enrollment has not.

Figure 7

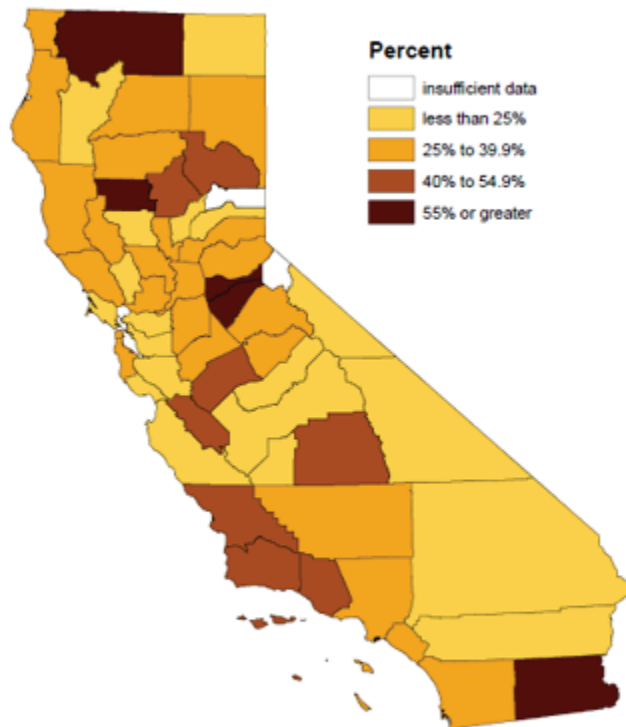


Source: State of California, Department of Finance, California Public K-12 Graded Enrollment and High School Graduate Projections by County, 2017 Series. Sacramento, California, December 2017. *2014-15 figures adjusted per an underreporting error by San Rafael and Terra Linda High Schools. Graduate data for these schools are from California Department of Education, Data Reporting Office, DataQuest report Cohort Outcome Data for the Class of 2014-15.

According to the Public Policy Institute of California (PPIC, 2012), in 51 of California's 58 counties, more students enroll in community colleges than in UC and CSU combined. However, this isn't the case in Marin, five other Bay Area counties (Alameda, Contra Costa, Napa, San Francisco, and Santa Clara) and Fresno County. Based on 2010 data from PPIC, less than 25% of Marin public and private high school graduates attend a community college (Figure 8).

Less than 25% of Marin public and private high school graduates attend a community college.

Figure 8
Percent of Recent High School Graduates Attending a Community College in California



NOTE: For more information see PPIC Data Set: Maps of College Enrollment Rates in California's Counties.
SOURCE: Public Policy Institute of California, based on data from the California Department of Education and the California Postsecondary Education Commission.

Racial/Ethnic Diversity

Marin County is far less racially, ethnically diverse than the other Bay Area counties, less so even than Sonoma (Tables 7 and 8). However, it is considerably more diverse than it has been. In 1980, 93% of Marin residents were White as were 89% in 1990 and 84% in 2000 (Marin Economic Commission, 2009). Currently, 72% of Marin residents are White (Table 7).

Table 7

Percent of Bay Area County Residents by Race/Ethnicity, 2016 Population Estimates

	Marin	Sonoma	Napa	Contra Costa	San Francisco	San Mateo	Solano	Santa Clara	Alameda
White, not Hispanic or Latino	71.9	64.0	53.0	44.6	40.9	39.8	38.7	32.3	32.1
Hispanic or Latino	16.0	26.6	33.9	25.4	15.2	24.8	26.2	25.9	22.5
Asian	6.3	4.4	8.5	17.1	35.4	28.9	15.7	36.5	30.2
Two or More Races	3.9	3.9	3.1	5.2	4.3	4.6	7.0	4.1	5.3
Black or African American	2.8	2.0	2.4	9.6	5.6	2.8	14.8	2.8	11.6
American Indian and Alaska Native	1.0	2.2	1.3	1.0	0.8	0.8	1.2	1.3	1.1
Native Hawaiian and Other Pacific Islander	0.2	0.4	0.4	0.6	0.4	1.6	1.0	0.5	1.0

Source: U.S. Census Bureau Quick Facts, <https://www.census.gov/quickfacts/fact/table/US/PST045217>

Table 8

Percent of Bay Area County Residents who are Foreign Born or Speak a Language Other than English at Home, 2012-2016 Population Estimates

	Marin	Santa Clara	San Mateo	San Francisco	Alameda	Contra Costa	Napa	Solano	Sonoma
Foreign Born	18.4	38.1	34.5	34.9	31.7	24.4	22.8	20.1	16.8
Language Other than English	22.9	52.1	46.5	44.0	43.9	34.5	35.6	29.8	25.9

Source: U.S. Census Bureau Quick Facts, <https://www.census.gov/quickfacts/fact/table/US/PST045217>

Marin's diversification is slower than that of the rest of the Bay Area. The Marin Economic Commission attributes this to housing costs and disparity in education levels, which in turn affects employment potential and possibly intergenerational transfer of wealth that allows some to stay in Marin while others without this benefit find it more difficult to afford to live in the county.

In general, COM's student body is more racially/ethnically diverse than the county. While that was true in 1990, when 89% of the County's population was White and about 75% of COM's students were, that pattern is more pronounced now. About 72% of Marin's population is White compared to 52% of COM credit students. Asians and African-Americans are enrolled at COM at slightly higher rates than their proportion in Marin County, while Native American proportions are equivalent (College of Marin, 2016).

COM's student body is more racially/ethnically diverse than the county.

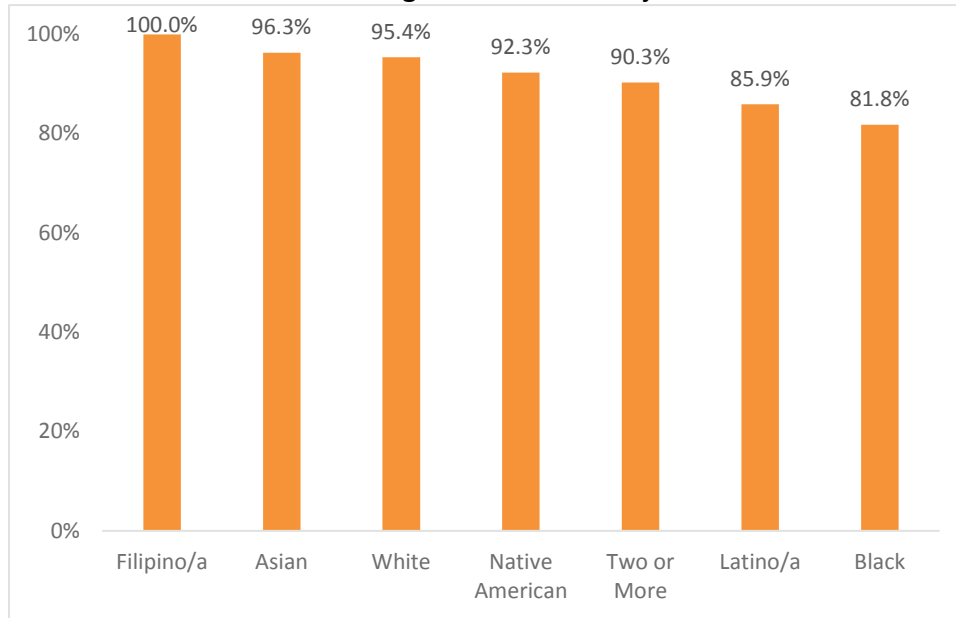
Racial/Ethnic Disparities

According to the Advancement Project's Race Counts data, Marin County ranks first among California counties in racial disparities (Race Counts, n.d.-b). Though these disparities exist in multiple quality of life domains, the focus for this environmental scan is on education. While all groups in Marin graduate from high school at high rates relative to the rest of California, Native Americans, students identifying as two or more races, Latinos and Blacks graduate at lower rates, from 92% to 82%, respectively (Figure 9).

Marin ranks 1st in California's racial disparities.

Figure 9

High School Graduates as a Percentage of Four-Year Adjusted Cohort Students by Race



Source: California Department of Education (2014-15) published on <http://www.racecounts.org/county/marin/>. Retrieved May 17, 2018.

Blacks and Latinos are far less likely than other racial/ethnic groups to be proficient in English and math. Also, Black students are far more likely than other groups to be suspended from school. Native Americans are considerably less likely to have access to early childhood

education. Further, there are very few K-12 teachers of the same race as Native American, Asian, Latino, Black and mixed race students.

In May 2017, the Marin County Board of Supervisors adopted a Racial Equity Action Plan to address racial/ethnic disparities in county government. Diversity and inclusion were also part of the county's 5-year business plan developed in 2015 and equity was a focus in the 2016 State of the County update (Avants, 2017).

Marin County Workforce & Industries

According to Marin Economic Forum CEO Robin Sternberg, "Marin has a workforce shortage, economic inequity, and housing shortage and other factors that influence our ability to grow and prosper" (Quackenbush, 2018).

"Marin has a workforce shortage, economic inequity, and housing shortage and other factors that influence our ability to grow and prosper."

Employment

In 2016, an estimated 12,800 Marin residents worked at home (U.S. Census Bureau, 2016-b). Marin has the highest percentage of work-from-home residents in the Bay Area, 11.4% (Prado, 2018). Napa and Sonoma are the next highest, at 7.3%. Within Marin, the work-from-home percentages are even higher for Ross, Tiburon, Sausalito, Belvedere and Fairfax, from 20.4% to 13.4%, respectively.

Marin is the work-from-home capitol of the North Bay

Even so, the majority of Marin residents commute out of the county to be able to afford to live here. Conversely, many who work in Marin can't afford to live here, so they commute in. Residents commuting out primarily go into San Francisco and south and they are largely managers and professionals. Those who commute in, commute from North and East primarily for retail, service and government jobs.

Commuting

As Figures 10 and 11 and Table 9 below show, more people commute in and out of Marin than live and work in the county, and that is increasing. Only 39% of people who live in Marin, work here. In 2002, 47% did. However, since 2006 the percentage of Marin residents who drive to work declined by 4% in favor of public transit, boosting BART, CalTrain and Golden Gate Ferry ridership (Metropolitan Transportation Commission, 2018).

Only 39% of Marin residents work in Marin.

As of 2015, about 63,000 people work in Marin but don't live here (Table 9). According to the Marin Economic Forum (2016), "commute patterns suggest Marin County provides low-wage jobs for the entire region."

Marin provides low-wage jobs for the Bay Area.

Figures 10 and 11



Table 9
Marin County Inflow and Outflow of Workers, 2002 and 2015

	2002		2015	
	N	%	N	%
Employed in Marin	95,799	100	100,663	100
Employed in Marin but Living Outside	53,011	55.3	63,229	62.8
Employed and Living in Marin	42,788	44.7	37,434	37.2
Living in Marin	90,887	100	96,574	100
Living in Marin but Employed Outside	48,099	52.9	59,140	61.2
Living and Employed in Marin	42,788	47.1	37,434	38.8

Source: U.S. Census Bureau, [OntheMap](#). Inflow/Outflow analysis by primary job type.

Marin Residents' Employment

The majority of Marin residents work in management, business, science and arts occupations (Table 10). While the percentage changed little, the actual number of people employed in these types of jobs dropped in the mid-2000s, then picked up again about 2012. This fluctuation reflects the economic downturn that occurred during that period. This drop occurred for all categories, except service, which continued to grow. Natural resources, construction and maintenance is the one occupational area that appears not to have rebounded. Likely that is due to construction job loss, as the industry detail data in Table 10 below suggests. Fewer Marin residents are working in information, finance, construction and trade. More are working in educational services, health care, and social assistance.

More Marin residents work in educational services, healthcare, and social assistance.

Table 10

Marin Residents: Employment by Occupation and Industry

	2000		2005		2006-2010		2012-2016	
	N	%	N	%	N	%	N	%
Civilian employed population 16 years and over	128,855		119,236		125,177		130,366	
By Occupation								
Management, business, science and arts	67,674	52.5	61,589	51.7	63,828	51.0	68,437	52.5
Service	15,446	12.0	17,269	14.5	18,505	14.8	20,212	15.5
Sales and office	31,867	24.7	27,591	23.1	28,714	22.9	28,725	22.0
Natural resources, construction, maintenance*	8,080	6.3	7,161	6.0	8,638	6.9	7,183	5.5
Production, transportation, and material moving	5,788	4.5	5,626	4.7	5,492	4.4	5,809	4.5
By Industry								
Agriculture, forestry, fishing and hunting, mining	704	0.5	442	0.4	964	0.8	780	0.6
Construction	7,857	6.1	6,988	5.9	8,744	7.0	6,761	5.2
Manufacturing	6,075	4.7	6,177	5.2	5,746	4.6	6,068	4.7
Wholesale trade	3,880	3.0	2,829	2.4	3,746	3.0	3,147	2.4
Retail trade	13,795	10.7	12,303	10.3	11,698	9.3	12,514	9.6
Transportation, warehousing, and utilities	3,518	2.7	3,227	2.7	3,732	3.0	3,767	2.9
Information	7,043	5.5	5,039	4.2	5,047	4.0	4,890	3.8
Finance, insurance, real estate, rental and leasing	14,879	11.5	16,340	13.7	14,009	11.2	13,327	10.2
Professional, scientific and management, and administrative and waste management services	25,884	20.1	20,786	17.4	23,701	18.9	26,326	20.2
Educational services, health care, social assistance	23,831	18.5	22,515	18.9	26,033	20.8	27,672	21.2
Arts, entertainment, recreation, accommodation, and food	10,283	8.0	11,475	9.6	10,644	8.5	12,285	9.4
Other services except public administration	6,979	5.4	7,850	6.6	7,132	5.7	8,194	6.3
Public administration	4,127	3.2	3,265	2.7	3,981	3.2	4,635	3.6

Source: U.S. Census Bureau

*Combines "Farming, fishing and forestry occupations" and "Construction, extraction, maintenance and repair" categories for 2000 and 2005

Marin Jobs

Marin’s employment base, meaning jobs with payroll in Marin, is primarily service, retail and government (Table 11). During the 1990s, Marin’s high-tech sector grew rapidly, but by 2005 it plummeted (Marin Economic Commission, 2009), especially in 2001 and 2002, and never fully recovered. At some earlier point, there was a stronger financial sector here as well.

Employment in Marin is primarily self-employed individuals and businesses with less than 25 employees.

Employment in Marin is primarily in very small businesses and self-employed individuals. About 92% of employers employed fewer than 25 people (Marin Economic Forum, 2016). About 37,000 businesses in Marin are sole proprietorships, individuals with no employees.

Table 11

Marin County Payroll Employment, 2010-16, Industry Sectors, # of Jobs

Category	2010	2014	2015	As of Aug 2016
Agriculture	450	380	330	310
Construction	4,700	6,080	6,470	6,730
Manufacturing	2,120	3,480	3,980	4,480
Wholesale Trade	2,380	2,800	2,950	3,000
Logistics	1,110	1,260	1,180	1,200
Retail Trade	13,420	14,270	14,290	14,800
Information	2,130	2,580	2,620	2,560
Financial Activities	6,940	6,840	6,380	6,350
Professional & Business Services	18,360	18,160	18,650	19,680
Educational & Health Services	17,280	19,670	20,180	20,730
Leisure & Hospitality	12,190	15,120	15,400	15,660
Other Services	4,970	4,840	4,950	5,080
Government	15,130	15,420	15,620	15,520
Total	101,180	110,900	113,000	116,100

Source: CA Employment Development Department

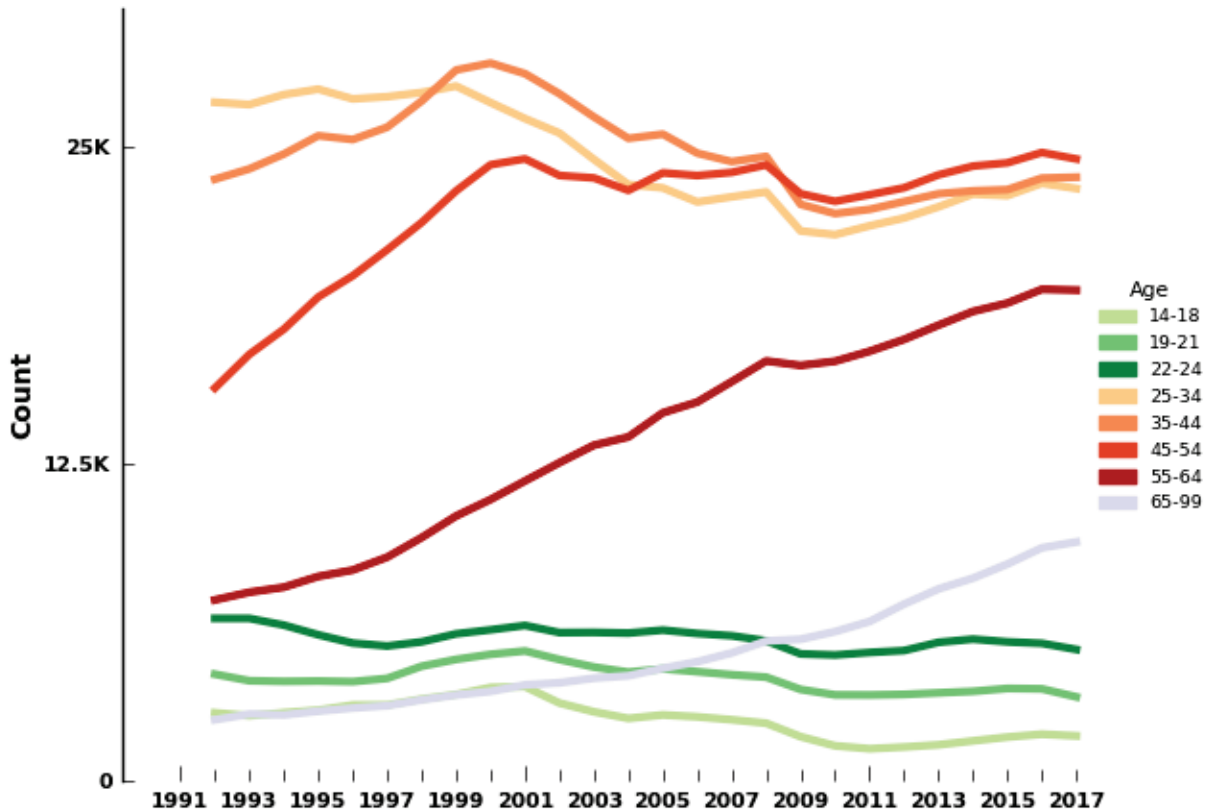
As previously shown, an increasing number of people who live outside of Marin is commuting in to fill these jobs.

The age and education levels of people employed in Marin has changed. Since 1999, employment has grown most among 55-64 year olds and those age 65-99 (Figure 12). Workers age 24 or younger dropped from 13,268 in 1992 to 10,242 in 2017 (23%). So has the number of workers age 25-34 and age 35-44. As shown earlier in this report, Marin's population is aging, but as these data show, so is its workforce.

Marin's workforce is aging.

Figure 12

Marin County Yearly Average Employment Counts by Age, 1991-2017



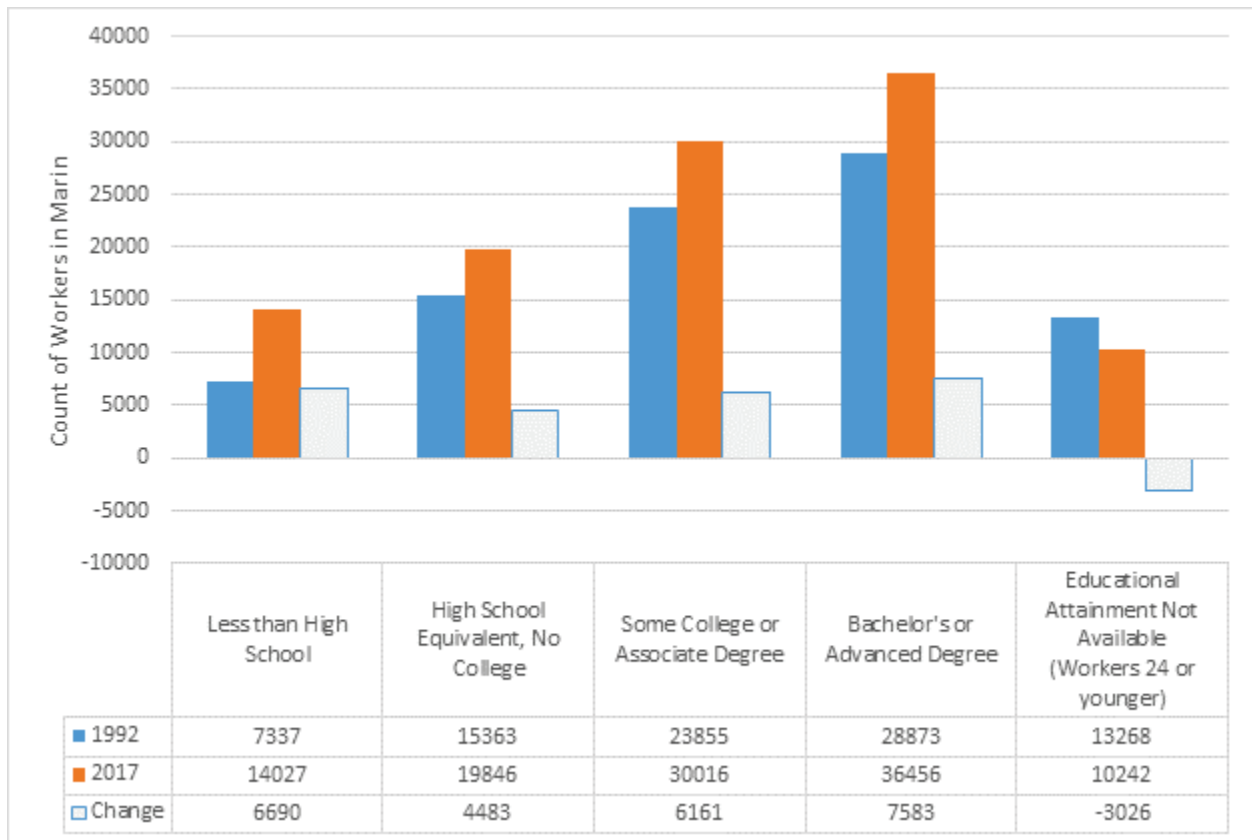
Source: U.S. Census Bureau, Center for Economic Studies, LEHD. [QWI Explorer](#).

Educational attainment of those working in Marin also has changed (Figure 13). The number of workers with less than high school education increased at the fastest rate, nearly doubling between 1992 and 2017. While the largest proportion remains workers with a bachelor's degree or higher, a substantial number of people working in Marin hold an associate's degree or less.

The number of workers in Marin with less than a high school education increased.

Figure 13

Marin County Beginning of Quarter Employment:
Counts by Worker Education and Yearly Averages



Source: U.S. Census Bureau, U.S. Department of Commerce, QWI Explorer

The combination of worker and occupation and industry characteristics suggests that many of these workers with lower education may be employed in Marin’s growing industries (see Marin Industries below) and commute into the county to work.

Marin Industries That are Growing

Industries that are currently growing in Marin County are mostly leisure and hospitality, such as hotels, restaurants, bars, and other tourism and lifestyle businesses (Marin Economic Forum, 2016). In addition, while cannabis production and outlets are controversial in Marin and being restricted by local and town councils, the industry is proliferating in Sonoma County and the East Bay. According to the Marin Economic Forum report, “cannabis should be treated as an agriculturally-based business that has some non-durable manufacturing components, including wholesale, logistics and retail” (p. 17).

Five industry groups may grow in Marin: biotech, tourism, health care, food and agriculture, and education.

The Marin Economic Forum has targeted five categories of industry groups where Marin has a competitive advantage with an opportunity for increasing gross domestic product through domestic sales and exports: biotech, tourism, health care, food and agriculture, and education (Quackenbush, 2018).

Educational Institutions: Competitors and Partners

Community College Competitors

Overall, students who apply to COM but enroll at a different community college are most likely to enroll at Santa Rosa Junior College and City College of San Francisco. Enrollment at both of these colleges has declined over the last few years.

SRJC and CCSF are COM's primary community college competitors.

Dominican University

Dominican University in San Rafael is a private, non-profit four-year with approximately 1,400 undergraduate students and 400 graduate students (Dominican University of California [Dominican], n.d.). 92% of Dominican's undergraduates receive financial aid. 23% are the first in their family to attend college and 51% are from traditionally underrepresented racial/ethnic groups. This university has a policy whereby, if students enroll full-time and do not graduate within four years, their fifth year is tuition-free. The school's 4-year graduation rate is about 63% and 6-year rate about 73%. Their graduation rates for students of color are similar to these overall rates. Graduation rates for first generation and low-income students vary considerably, especially the four-year rate. Their six-year rate is similar to the overall rate.

Few COM students transfer to Dominican, between 8 and 16 each year. However, about 11% of their undergraduates are from Marin (Dominican, 2017). The teacher credential and nursing programs are popular with local students.

Partnership with Sonoma State

Beginning Fall 2018, students working toward a bachelor's in business administration will be able to take upper division classes at COM through a partnership with Sonoma State University (College of Marin, 2017).

Tuition and Fees

Significantly lower tuition and fees provide community colleges a competitive advantage over four-year institutions. Tuition and fees are much higher in the University of California and California State University systems, and they continue rising (Tables 12, 13 and 14).

Table 12

University of California Average Annual Student Charges for Resident Undergraduate Students
Academic Year 2008-09 through 2016-17

	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Tuition	6,202	7,998	9,342	11,160	11,160	11,160	11,160	11,160	11,160
Student Services Fee	864	900	900	972	972	972	972	1,020	1,074
Surcharge	60	60	60	60	60	60	60	60	60
Campus-Based Fees	901	938	977	989	1,008	1,030	1,125	1,211	1,257
UC Total Annual Tuition and Fees	8,027	9,896	11,279	13,181	13,200	13,222	13,317	13,451	13,551

Source: University of California Office of the President, Budget Analysis & Planning, [Historical Fee Levels, October 2016](#)

Table 13

California State University Annual Student Charges for Resident Undergraduate Students
Academic Year 2008-09 through 2016-17

	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Tuition	3,048	4,026	4,440	5,472	5,472	5,472	5,472	5,472	5,472
Campus-Based Fees	802	866	938	1,045	1,140	1,214	1,287	1,346	1,409
CSU Total Annual Tuition and Fees	3,850	4,892	5,378	6,517	6,612	6,686	6,759	6,818	6,881

Source: California State University Budget Office, [System wide Average - 10 Year Fee History](#)

Table 14

California Community College Student Enrollment Fee Per Unit
Academic Year 2008-09 through 2016-17

	2008-09	2009-10	2010-11	2012-13	2013-14	2014-15	2015-16	2016-17
Enrollment Fee Per Unit	20	26	36	46	46	46	46	46

Source: CCCCO, Finance & Facilities Division, [Student Enrollment Fee History](#). Prior to 1984, community colleges charged no fee.

Regional/Local Partnerships

Workforce

COM has many workforce, K-12, and community partners.

COM is partnering with the Marin Economic Forum and Workforce Alliance of the North Bay on a jobs initiative study and program to help employers in the full employment economy educate people to meet employers' need for workers, particularly in tourism-hospitality and business-technology. "The objectives of the study include connecting industry professionals with future employees, increase opportunities for local businesses to hire local employees, support retention and expansion efforts and to enhance employment equity." The program is expected to launch in 2019 and involve more than 500 employers (Sternberg, 2018).

K-12 Partnerships

College of Marin has partnerships with local school districts with a focus on school sites with the greatest percentage of first-generation college, low-income, under-served students. These programs are intended to help prepare students academically for college, allow them to get a head start on earning college credits and explore interests, reduce the time and cost of attending college, and increase our enrollment. These programs have grown substantially in the last few years. For example, Summer Bridge started with one class of 23 students 5 years ago, and the College expects approximately 150 students to enroll in the 2018 June/July session. COM's College Success Saturday event began 6 years ago with 67 students, and will exceed 200 in 2018.

Partnerships at the elementary school level include "College Knowledge Workshops" with local 3rd graders. The college partners with middle schools, many of whom have active Advancement Via Individual Determination (AVID) programs, through college information fairs and panels and presentations for students and parents. COM's high school program covers all the public high schools in Marin as well as several East Bay charter high schools who have invited the college to their campuses.

Community-Benefit Partnership

COM is the educational partner in a new joint community-benefit partnership with the *Marin Independent Journal* (IJ) called Giving Marin. The goal is to give visibility and support to Marin's small nonprofits primarily through underwriting marketing space in the IJ. A host of other businesses, community service and philanthropic organizations are participating in this partnership as well (Devincenzi, 2018).

Federal Issues that Could Affect COM

Immigration and DACA

This is an area that frequently came up in the COM environmental scan survey and that is in constant flux in light of the Trump Administration's actions on immigration, lawsuits filed against the State of California, and the rescinding of the DACA and DAPA programs and the subsequent court challenges to that decision. Some southern California municipalities have joined the Trump Administration lawsuit against California. These decisions and challenges require institutional responses, stress communities, and create the risk of indefinite detention and deportation for individuals and families.

Undocumented Residents

According to the Migration Policy Institute (2015), from 2009-2013 an estimated 7,000 people in Marin County were eligible for

Deferred Action for Parents of Americans and Lawful Permanent Residents (DAPA) or Deferred Action for Childhood Arrivals (DACA). Approximately 2,000 of these are DACA-eligible. COM estimates about 300 DACA students enroll at the college.

Undocumented residents are at-risk given current immigration policies and controversies.

Recent California legislation was enacted to essentially make California a "sanctuary" state for undocumented immigrants. SB 54 was passed to prohibit local law enforcement officers from detaining people based solely on suspected or actual immigration status, and to limit local law enforcement's sharing of data with ICE and assisting them with immigration enforcement. This law, along with AB 450 and AB 103, serves as the basis for the "sanctuary" state that has prompted the Trump Administration lawsuit. AB 450 (2017) prohibits employers from providing information or allowing immigration agents into nonpublic areas without a judicial warrant and AB 103 (2017), along with the Trust Act, prohibits local law enforcement from detaining people solely on immigration charges.

International Students

While some colleges and universities see a different pattern, overall, until recently the

number of international students in the U.S. was increasing (Kavilanz, 2018; Wang, 2018). It is widely acknowledged that the Trump Administration's policies and tone have played a role in this decline, as has complications with visas, the high cost of education in the U.S. and the strengthening of education markets in countries where students can sometimes stay and work after studying more easily, such as Canada, Ireland, Australia and New Zealand.

International student enrollment is declining in the U.S.

State and California Community College System Issues that Could Affect COM

115th CA Community College, Solely Online

The California Community College System plans to start a new college that is completely online and geared toward adult learners. It is believed that there is a substantial number of adults in the workforce who need additional skills and credentials but are unable to attend brick and mortar colleges and therefore lack a means of economic mobility (“Bold plans,” 2018; CCCCCO, 2017). Of primary focus are 25 to 34 year olds with no degrees or credentials. The model will award credit for prior learning and will utilize competency-based education. Two specific curricular areas are proposed thus far – IT support and a certificate in medical coding. Both of these programs are intended to meet labor demand in California (CCCCO, 2018-b).

The form this new college would take has not yet been determined. It may become part of an existing college, or an existing college would host a consortium of colleges that opt-in to this model, or a new district would be formed and operated by the Chancellor’s Office. Forty California Community College CEOs responded to a survey administered by Coastline College (n.d.) to give feedback about the solely online 115th community college. Opportunities and concerns were:

Opportunities: The ability to serve non-traditional students, including working adults and those who live remotely, in a more flexible and innovative environment. Increased availability of course offerings and choices for students, including earning degrees solely online. Also, a more career- and CTE-focused college with competency-based curricula. This college’s innovative practices could be adopted by all community colleges.

Concerns: The proposed college was regarded as competition to the existing colleges, which may adversely affect the funding of apportionment colleges. Many believe the current California community college infrastructure already exists to meet online student need. Further, some believe there’s insufficient need for a specifically career-focused college. Other concerns include the quality of the programs, offering non-accredited courses, unaddressed logistical requirements in the proposal, limitations of the online format for certain programs that require hands-on training, unaddressed need for student services and student engagement, and lack of adherence to participatory governance values and practices of California community colleges.

Funding Attached to Performance Measures

The Chancellor’s Office has tasked a workgroup to determine a new set of performance indicators it will use to gauge the progress of colleges toward student access, equity and success goals in its long-term plan, *Vision for Success: Strengthening the California Community Colleges to Meet California’s Needs*. Although these metrics are not being developed with the intent of becoming funding-based performance indicators, that direction is likely.

Simultaneously, a new college funding formula has been proposed by Governor Jerry Brown that includes funds based on performance metrics. A CEO work group was tasked to give feedback on the proposal. That group has made several recommendations that relate to increasing base funding, stabilizing funding, and ensuring fairness in funding all colleges. Because COM is a Basic Aid college, rather than funded through apportionment, its funding is likely to be unaffected by a new formula, unless categorical funds are included and their amount and/or manner of distribution changed.

Workforce Development

At the recommendation of the California Community College Board of Governors in 2016, the Governor and Legislature approved the *Strong Workforce Program* to spur career technical education (CTE) in all of the 114 California community colleges. A new annual recurring investment of \$200-plus million is directed toward lifting low-wage workers into living-wage jobs and create one million more middle-skill workers

College of Marin currently receives nearly \$1 million per year in Strong Workforce funding. In following with the state economic development program's campaign of "more and better" CTE, COM is investing in new programs that show a high labor market demand in the region and pay a living wage. The "more" is increasing the number of students enrolled in programs leading to high-demand, high-wage jobs. The "better" is improving program quality, as evidenced by more students completing or transferring programs, getting employed or improving their earnings. COM is working closely with industry partners, the Workforce Alliance of the North Bay, CTE Program Advisory Boards and others to align desired skills with industry needs.

AB19 California College Promise

This new legislation establishes free tuition for one academic year for first-time students who are enrolled in 12 or more semester units or the equivalent. Students must submit a Free Application for Federal Student Aid (FAFSA) or a California Dream Act application (School & College Legal Services of California [SCLSC], 2017). As of May 2018, this program is unfunded and colleges are not required to participate. However, COM is considering options for doing so.

Nationally, more students are beginning to attend community colleges for their first two years as a way to manage the cost of college (Spencer, 2018).

AB 705 Student Success Act of 2012: Matriculation and Assessment

This legislation is designed to maximize the likelihood "that students will complete transfer-level English and math within one year by using specific placement criteria, including high school coursework, high school grades, and high school grade point average" (SCLSC, 2017). Further, students cannot be required to enroll in remedial math or English that would lengthen their time to degree unless their high school performance shows they are highly unlikely to succeed without it. Students can be required to concurrently enroll in additional support courses during the same semester only if that support increases their likelihood of passing the transfer-level course.

CCCApply

Students must apply to COM via the Chancellor’s Office CCCApply portal. They encounter several potential obstacles during this process, which may contribute to attrition before they can even successfully apply to the college. Students must create user accounts on both the CCCApply and MyCOM, which can be confusing and cumbersome. Wording of some items on the application itself also creates confusion and potential errors due to missing or conflicting information, and students can’t submit until all errors are corrected. Finally, the application is only available in English. These barriers can be discouraging to students, many who have never completed a college application and are doing so without support from a counselor or other school staff.

A new version, CCCApply 3.0, is in the early stages of development and is supposed to streamline the process and eliminate technical barriers. The expected rollout date is unknown.

Technology

“The financial impact of cybersecurity breaches is rising and some of the largest costs in 2017 related to ransomware attacks, which accounted for 64% of all malicious emails” (World Economic Forum, 2018).

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