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The Sonoma County Economic Development Board (EDB), in partnership with the Sonoma County Workforce Investment Board, is pleased to bring you the 2011 Workforce & Education Report. Highlights from this Local Economic Report include:

- Falling home prices in Sonoma County have made housing more affordable for county residents. In the first quarter of 2006 only 9% of county residents could afford a median-priced home. By the fourth quarter of 2010, that number had risen to 45%.

- Employment in Sonoma County has decreased dramatically since its peak of 190,545 in the fourth quarter of 2008. Since then, employment has decreased by 10.3% to 168,466, a difference of 22,079 jobs.

- The Sonoma County labor market will demand an increasingly skilled and educated workforce as the economy emerges from recession. While Sonoma County educational performance ranks favorably against comparable regions in some metrics, educational trends show that there is still room for improvements.

This annual assessment of our region’s economic progress is meant to help guide discussions by local business, government, community and workforce leaders regarding strategies for shaping our region’s economic future.

The EDB encourages readers to explore these issues further by contacting the agencies and organizations cited throughout this report, and by visiting the EDB’s website, www.sonomaedb.org.

The Economic Development Board is committed to working with our partners to take the actions necessary to build on our strengths and to address our deficiencies – to improve economic opportunities and quality of life for all Sonoma County residents.

Sincerely,

Ben Stone
Executive Director
Sonoma County Economic Development Board

Karen Fies
Director of Employment & Training
Sonoma County Human Services Department
Total Employment
Total employment measures the number of people hired by firms within Sonoma County. Employment has decreased dramatically since its peak of 190,545 in quarter 4 of 2007. Since then, employment has decreased by 10.3% to 168,466. This is a difference of 22,079 jobs.

Unemployment
Sonoma County unemployment reached its lowest rate in the past decade during the fourth quarter of 2006 (3.9%). Since then, unemployment has steadily increased to 10.2% in quarter 4 2010. Sonoma County has consistently had an unemployment rate below the California average (12.4), but it is currently above the national average (9.6%). This data has been seasonally adjusted.

Workforce History
Three-year estimates by the U.S. Census bureau indicate that 31.1% of Sonoma County residents worked less than full-time and 29.9% did not work, compared to 27.2% and 31.9% in California, respectively. The percent of population that was employed full-time is similar in both Sonoma County and California at 38.9% and 40.8%.

Seasonally Adjusted Unemployment Rates, 2004-2010

Source: California Employment Development Department (www.edd.ca.gov), 2011

Work History Estimates, 2007-2009

Source: U.S. Census Bureau (www.census.gov)

Sonoma County Seasonally Adjusted Non-farm Employment, 2004-2010 (Thousands)

Source: California Employment Development Department (www.edd.ca.gov), 2011
Cluster Employment
Between 2008 and 2010, Sonoma County employment declined in every sector except for educational and health services, professional and business services and leisure and hospitality. However, the annual employment from grew in most sectors, excluding manufacturing, construction, and retail trade sectors, from 2000 to 2009.

Selected Sector Employment
The health care and social assistance, manufacturing, and retail trade sectors represent a greater percentage of employment in Sonoma County than the California average. Professional business services, wholesale trade, and administrative, support, and waste employment sectors are a smaller percentage of employment in Sonoma County than the California average.

Median Hourly Wages
Median hourly wage compares the income of middle earning employees in various sectors. The median wage for many of Sonoma County’s growing occupations, such as professional services, is higher than in 2009. General Managers receive the highest median wage of $52 dollars an hour.

Source, All: California Employment Development Department (www.edd.ca.gov)
5-Year Cluster Employment Growth Projections
Moody’s Economy.com 5-year employment growth forecasts for Sonoma County’s employment indicate that all clusters are expected to increase from 2011 to 2016. Creative professional services and construction and green services are estimated to have the highest growth rates (3.4% and 2.2%, respectively). As a whole, these clusters are projected to account for 60.4% of total employment in Sonoma County. Over this period, total employment is expected to at a compound annualized rate of 1.9%.

Fastest-Growing Occupations
Among the fastest-growing occupations based on employment, are personal and home care aides, registered nurses, and waiters and waitresses. Food service occupations tend to have high turnover rates, which could contribute to the high number of jobs available in those sectors. The broad variety of growing occupations is indicative of the variety of businesses utilizing Sonoma County’s workforce.

5-Year Cluster Output Projections
Moody’s Economy.com 5-year output growth projections predict strong growth in all of Sonoma County’s clusters. These clusters are projected to account for 57.3% of all Sonoma County’s output in 2016. Over this period, total output is expected to grow at a compound annualized rate of 5.1%.

Sonoma County Forecasted Employment by Cluster, Compounded Annual Growth Rate, 2011-2016

Sonoma County Forecasted Employment by Cluster, Compounded Annual Growth Rate, 2011-2016

Sonoma County’s Fastest Growing Occupations 2008-2018


Source: Employment Development Department (www.edd.ca.gov)
**Workforce: Sector Employment**

**Industries with Highest Employment & Concentration of Workers Ages 55+**
Industries with the highest employment of workers aged 55 and above indicates those industries that will be most likely to seek large quantities of replacement employment in the coming decades. The healthcare and social assistance industry currently has nearly 6,000 employees nearing retirement age, and there is a large concentration of older workers in the retail trade (25%) and manufacturing (20.2%) industries.

**Employment Growth, Concentration, & Annual Pay by Cluster**
The graph measures the relative size of Sonoma County’s largest workforce sectors (which comprise more than 85% of the county’s total employment), as well as 10-year cluster growth rates and average annual pay. The graph demonstrates where employment is concentrated in Sonoma County and how compensation in those industries compare. With the exception of leisure and hospitality, our growing clusters pay above-average wages, a positive trend that has the potential to increase average pay over time.

Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (lehd.ddd.census.gov)


www.sonomaedb.org
Workforce: Housing

Median Housing and Income
Between 2008 and 2010, the median price of a home in Sonoma County decreased 15%. As the median price of homes in Sonoma County has dropped from its high in 2006, housing has become more affordable for many residents. In the 4th quarter of 2010, 45% of Sonoma County residents could afford to purchase a median-priced home. In the first quarter of 2006, only 9% of residents could afford a median-priced home.

Household Purchasing Power
Families making the median-family income for Sonoma County are not able to afford median-priced homes here. The median household income was $63,848 in Sonoma County in 2010, and the purchasing power, or the price of home they were able to afford, for that level of income was $196,466. This price is considerably less than the median-home price in Sonoma County. Southwest Santa Rosa had the lowest median-home price in the third quarter of 2010 at $241,590. Healdsburg had the highest median-home price for the same period at $786,000.

Median Home Price Comparison
When compared to peer counties, only Napa County had a lower median-home price in 2010. Sonoma County’s home prices, compared to peer regions, suggest that employers in Sonoma County may now have an advantage in retaining or attracting high-quality workers over other similar communities.

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### Median Home Price, 2010

<table>
<thead>
<tr>
<th>County</th>
<th>Median Home Price (Thousands of Dollars)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Napa</td>
<td>315</td>
</tr>
<tr>
<td>Sonoma</td>
<td>63,848</td>
</tr>
<tr>
<td>Ventura</td>
<td>416</td>
</tr>
<tr>
<td>Santa Barbara</td>
<td>315</td>
</tr>
<tr>
<td>Santa Cruz</td>
<td>578</td>
</tr>
</tbody>
</table>

### Home Buyer Affordability Index, 2010

<table>
<thead>
<tr>
<th>Region</th>
<th>Home Buyer Affordability Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marin</td>
<td>41.0</td>
</tr>
<tr>
<td>Santa Cruz</td>
<td>41.0</td>
</tr>
<tr>
<td>SF Bay Area</td>
<td>41.0</td>
</tr>
<tr>
<td>Santa Maria</td>
<td>41.0</td>
</tr>
<tr>
<td>Sonoma</td>
<td>41.0</td>
</tr>
<tr>
<td>Monterey Region</td>
<td>41.0</td>
</tr>
<tr>
<td>California</td>
<td>41.0</td>
</tr>
<tr>
<td>Northern California</td>
<td>41.0</td>
</tr>
<tr>
<td>United States</td>
<td>41.0</td>
</tr>
</tbody>
</table>

*Note: Q4 Percent able to afford median-priced home
Source: California Association of Realtors (www.car.org)
**Workforce: Demographics**

**Population Projections**
Between 2010 and 2050, the age composition of Sonoma County is projected to change significantly. The 35-54 age group comprises people in the middle of their career, and is the bulk of the working-age population. In the year 2010, residents between 35-54 were estimated to make up 26% of the total population in Sonoma County; by 2050, they will make up only 21%.

In contrast, as the middle-aged population shrinks, Sonoma County will be getting both older and younger. **The 65+ age group is projected to increase from 12% in 2010 to 16% by 2050. Similarly, the youth population under the age of 15 is expected to grow 19% to 24%.**

**Race-Ethnicity Projections and Distribution**
The race-ethnic composition of Sonoma County is also projected to change significantly over coming decades. The percentage of Sonoma County residents identifying as white is expected to decrease 8% every decade until 2050, while the percentage of residents identifying as Hispanic is expected to increase around 7% per decade.

By 2050, the Hispanic population is expected to become **51 percent of the population**. Currently, about 70% of the Hispanic population is under the age of 35. In contrast, more than 60% of the White population is over the age of 35.

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**Sonoma County Age Distribution, 2010 - 2050**

<table>
<thead>
<tr>
<th></th>
<th>2010 (Est.)</th>
<th>2050 (Est.)</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>65+</td>
<td>12%</td>
<td>16%</td>
<td>23%</td>
</tr>
<tr>
<td>55-64</td>
<td>14%</td>
<td>9%</td>
<td>-36%</td>
</tr>
<tr>
<td>45-54</td>
<td>15%</td>
<td>10%</td>
<td>-37%</td>
</tr>
<tr>
<td>35-44</td>
<td>11%</td>
<td>11%</td>
<td>0%</td>
</tr>
<tr>
<td>25-34</td>
<td>13%</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>15-24</td>
<td>14%</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>5-14</td>
<td>13%</td>
<td>16%</td>
<td>23%</td>
</tr>
<tr>
<td>0-4</td>
<td>6%</td>
<td>8%</td>
<td>33%</td>
</tr>
</tbody>
</table>

**Population by Race-Ethnicity in Sonoma County 2010-2050**

- **White**: 24%
- **Hispanic**: 34%
- **Asian/Pacific Islander**: 5%
- **American Indian**: 1%
- **Multi-Race**: 2%
- **Black**: 1%

**Age Distribution of White and Hispanic Population, 2010**

- **Projected Decrease of White Population per Decade**: 8%
- **Projected Increase of Hispanic Population per Decade**: 7%

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Source: All: Educational Demographics Unit, CA Department of Education
**Education: High School**

**Class Size**
Small class sizes show substantial advantages in student achievement and success. During the 2009 school year, the average class size for Sonoma County students taking math was 24.8 (down from 24.9 in 2008), 26.8 for science (down from 27.4), 27 for social science (down from 27.7), and 23.9 for English (down from 24.9).

Sonoma County’s average class sizes for core subjects such as English, Math, Science, Social Science have been consistently smaller than the state averages. Among comparable counties, only Marin’s class sized averages are below Sonoma County in every area.

**High School Completion**
Approximately 4,500 students completed high school in the 2008-2009 school year. This figure indicates that 26% of students who registered for 9th grade in the 05-06 year did not complete high school in Sonoma County. It also indicates that 20% of the class who enrolled in their senior year in 2008-2009 did not complete high school in Sonoma County.

**Drop Rate**
Sonoma County’s adjusted dropout rate in the 2008-2009 school year (21.7%) was slightly above than that of the California average (21.5%). Compared to peer counties, Sonoma County’s dropout rate is the highest. In previous years, Sonoma has consistently had a dropout rate lower than the California average.

Students who drop out of high school are significantly less likely to obtain stable employment with an income capable of sustaining the cost of living in Sonoma County. Roughly one-fourth of the students that enter the 9th grade in the Sonoma County school district will not graduate with a diploma in four years.

Source: All: Educational Demographics Unit, CA Department of Education
County Testing Trends
All California public school students are required to pass the California High School Exit Exam in order to earn a high school diploma.

Sonoma County exceeded the statewide high school exit exam pass rate in both Math and English/Language Arts in the 2009-2010 school year, however, significant achievement gaps exist between ethnic groups. The overall pass rate for Sonoma County was 85 percent in both subjects, 4 percentage points higher than the California average.

District Performance Measures
The Academic Performance Index (API) measures the academic performance and growth of schools based on several academic measures. High schools in Sonoma County had an overall average API score of 767 in 2010. The API target for California high schools is 800. All districts in Sonoma County have seen improvement in API scores from 2008-2010. However, out of all the high school districts in Sonoma County, only Petaluma averaged the target API score of 800.

Source, All: Educational Demographics Unit, CA Department of Education
**Education: Post-Secondary Preparation**

**College Readiness**
The average eligibility of high school students for UC/CSU college admission throughout the county increased from 17.1% in 2008 to 21.6% in 2009. The year 2008 marked the lowest average eligibility in the county over the past decade. Sonoma County has a smaller percent of graduates eligible for UC/CSU college admission than the California average.

There are also obvious differences in UC/CSU eligibility by racial or ethnic identification at both the state and county level.

**Standardized Test Scores**
Sonoma County students averaged higher on the SATs (Scholastic Aptitude Test) than both the state and national averages. Of the counties used for comparison, only Marin County had a higher average SAT score over the past three years.

With the exceptions of Roseland Elementary and Cloverdale districts, all of the school districts in Sonoma County have averaged above the California and national average SAT scores for 2009. West Sonoma County and Santa Rosa City Schools had the highest SAT scores in the district for 2009.

Sonoma County students average ACT (American College Test) scores averages remained relatively unchanged, but still well above state and national levels. They are also higher than all of competitive Counties in 2009.

Source. All: Educational Demographics Unit, CA Department of Education
**Education: English Learners**

**English Learners**
The percentage of English Language Learners (ELL) for the 2009-2010 academic year remained consistent with last year at 23.7% in Sonoma County. The percentage of English Language Learners in Sonoma County is now equal to the state average (23.7%) and is growing faster than the state average.

In 2001, the percentage of English learners was 15.1%. The number of English learners has increased by nearly 60 percentage points over the past decade in Sonoma County. However, the number of students that have been redesignated from English Language learners has not had as significant of an increase. In fact, the percent of students who have been designated has only slowly increased since its low in 2005.

**ELL Students by District**
Roseland Elementary has the highest percent of English Language Learners (72.3%). This grew from 64.9% the previous year. Sonoma Valley came is second with 33.7%. The majority of school districts in Sonoma County are below the county average with West Sonoma County Union High being the lowest at 2.8%.

**Source:** All: California Department of Education

**English Learners Sonoma County by District, 2009-2010**

- West Sonoma County: 2.8%
- Petaluma Joint Union High: 14.5%
- Cotati-Rohnert Park Unified: 17.8%
- Santa Rosa Unified: 18.1%
- Windsor Unified: 18.7%
- Cloverdale Unified: 26.8%
- Healdsburg Unified: 33.7%
- Sonoma Valley Unified: 37.4%
- Roseland Elementary: 72.3%

**English Learners Sonoma County, 2001-2010**

- 2001: 8.6%
- 2010: 23.7%

**English Learners as a Percent of Total Enrollment, 2009-2010**

- Marin County: 14.9%
- San Luis Obispo County: 15.9%
- Napa County: 23.1%
- Sonoma County: 23.7%
- California: 23.7%
- Santa Barbara County: 32.1%
Education: Community College

Enrollment Demographics
The total number of students enrolled in Santa Rosa Junior College totaled 57,025 for the 2009-2010 academic year, 6.6% below the previous year and down 11.0% since 2000.

Of those enrolled in the 2009-2010 academic year, 55.5% are female and 42.5% are male. This coincides with national trends showing females are outpacing males in secondary education enrollment.

Also of note, enrollment at Santa Rosa Junior College is projected to increase by more than 10,000 students (18%) over the next 9 years.

As of the academic year 2008-2009, the majority of the students (61%) identified as white; however this number decreased over the past decade (70% in 2001). During the same period (2001-2009), the proportion of students identified as Hispanic grew from 12.9% to 18.6%.

Enrollment by Age
Forty-five percent of students enrolled for credit at the Santa Rosa Junior College are between ages 20 and 29. This increased from last year, when only 38.1% of those enrolled for credit were between these ages. Among non-credit enrollees, the majority of students enrolled at the Santa Rosa Junior College are over the age of 50.

Local Workforce Efforts

Sonoma County Workforce Investment Board

In an effort to strengthen Sonoma County’s workforce competitiveness in an ever evolving economy, Sonoma County’s Workforce Investment Board has undertaken several endeavors to facilitate the connection between a capable workforce and employer needs. Here are a few projects the WIB has been working on this year:

- In 2010 the Sonoma County Workforce Investment Board (WIB) along with Marin, Solano, and Napa WIB’s were the recipient of a California Clean Energy Workforce Training Program (CCEWTP) grant which ran through June 2011. The emphasis of the grant was workforce development and training to assist unemployed or underemployed construction workers, enter career pathways in the green building industry. Sonoma County enrolled 278 participants to receive training for Build it Green - Certified Green Building Professional, Lighting Design, HERS I, HERS II, and other clean/green certifications. The 234 participants who completed training attained 539 recognized certifications or degrees.

- In response to increase demand for immediate and easily accessible employment services, the Sonoma County Workforce Investment Board’s Job Link launched its “Virtual One Stop.” This is an online service that allows job seekers to create a resume, apply for available job openings in Sonoma County and beyond, and employers to search resumes, post job openings, and access labor market information. By April of 2011, over 1,200 people used this service and were referred to nearly 900 job openings.

- The Sonoma County Youth Ecology Corps (formerly known as the Summer Jobs program), has kick off its third year of providing paid job experience for low income youth ages 14-21. Funding for the program has been provided by the Workforce Investment Act, Sonoma County Water Agency, the Sonoma County Fish & Wildlife Commission, the Agricultural Preservation and Open Space District, and the Miranda Lux Foundation. This year’s program will provide approximately 200 youth with a paid job this summer.

With the collaboration of local businesses, community-based organizations, and government entities, the Sonoma County Workforce Investment continues to successfully serve Sonoma County’s workforce.

Scott Kincaid, Chair
Workforce Investment Board

Karen Fies, Director
Employment and Training
Sonoma County Human Service Department
Methodology and Sources

Methodology

The 2011 Workforce and Education Report is a product of the Sonoma County Economic Development Board (EDB) and the Workforce Investment Board (WIB). This report incorporates information on workforce and education trends in Sonoma County as well as some brief statistics on housing and population demographics.

This report offers composite representations of raw data and cite respective source data sets. For more information, please see the listed sources. Interested readers are encouraged to contact data source agencies or organizations for further research or visit our website www.sonomaedb.org. Readers are also invited to suggest improvements for future reports by calling (707) 565-7170 or e-mailing edb@sonoma-county.org.

Sources

This report includes data from various agencies. Below is a list of those agencies and companies.

- Bay Area Real Estate Information Services, Inc.
- California Association of Realtors
- California Department of Education
- California Department of Finance
- California Employment Development Department
- Empire College
- Moody’s Analytics
- Santa Rosa Junior College
- Sonoma State University
- Sonoma County Economic Development Board
- UCLA California Health Interview Survey
- United States Bureau of the Census
- United States Bureau of Labor Statistics
- Workforce Investment Board

Acknowledgements

The 2011 Workforce and Education Report was compiled, analyzed, and edited by Economic Development Board project coordinators, Loren Lopez, Lauren Ward & Afroz Baig. A special thanks to the Workforce Investment Board for provide additional information of local efforts in Sonoma County.
With Acknowledgment and Appreciation to Local Key Businesses Supporting Sonoma County Economic Development:

Director

Executive

Sponsor

County of Sonoma General Services, Real Estate Division
County of Sonoma Board of Supervisors
Sonoma County Health Services
Sonoma County Transportation & Public Works

www.sonomaedb.org