



# Uplift

## Central Coast

Regional Plan Part I Report

*California Jobs First*

*Prepared for the State of California's Governor's Office of Planning and Research (OPR), Office of Business and Economic Development (GO-Biz), and Labor and Workforce Development Agency (LWDA)*

December 31, 2023

# Table of Contents

- Table of Contents ..... 1**
- Preface: To the State of California, Our Partners, and Community ..... 2**
- Glossary ..... 5**
- Introduction ..... 8**
- Understanding the Central Coast ..... 28**
- Stakeholder Mapping ..... 89**
- Strengthening Industry to Create Opportunity ..... 105**
- Empowering Workers to Access Economic Mobility ..... 146**
- Adding It Up: Cluster Opportunities ..... 156**
- Implications for Strategy Development ..... 164**
- Annex ..... 168**
  - Annex 1: Additional SWOT Analysis ..... 169*
  - Annex 2: Vision Committee Members ..... 171*
  - Annex 3: Regional Steering Committee Members ..... 173*
  - Annex 4: Stakeholder Mapping Lists ..... 179*
  - Annex 5: Community Engagement Details ..... 197*
  - Annex 6: Top Employers by Central Coast County ..... 200*
  - Annex 7: Local and Regional Plans and Reports Reviewed ..... 206*
  - Annex 8: Uplift Team ..... 209*
  - Annex 9: State Requirements Matrix ..... 210*
  - Annex 10: Methodology ..... 214*

# Preface: To the State of California, Our Partners, and Community

On behalf of Uplift Central Coast Coalition, we are proud to share this insightful, community-informed report and analysis of our collaborative work to date.

**At least 45 percent of residents in the Uplift region belong to families whose income does not cover basic needs.** Economic realities and quality-of-life barriers make it difficult for far too many hard-working residents to make ends meet and thrive in their communities. Traditionally marginalized and disinvested communities have been excluded from economic conversations for too long. As a coalition, we are working to not just make sure that these communities have a seat at the table, **we are redefining the way the table is built entirely.**

Uplift Central Coast is a six-county coalition that encompasses Santa Cruz, San Benito, Monterey, San Luis Obispo, Santa Barbara, and Ventura Counties. Convened by three economic development agencies - REACH, Economic Development Collaborative (EDC), and Monterey Bay Economic Partnership (MBEP) – our coalition is powered by Central Coast residents working together toward a shared vision of a sustainable, diverse, inclusive economy built by and for the region's residents. **Together, we are focused on addressing systemic barriers that hinder equal access to economic opportunities. We believe in our communities, and their futures.**

This report reflects the complex realities, lived experiences, and disparities that exist across the region for the community members who strive to build their lives on the Central Coast. From housing and childcare to job quality and emerging industries, our team has synthesized data points from economic research and existing strategies, and engaged thousands of community members to inform an analysis of the current barriers and what may be needed to achieve the stability and success that residents aspire to.

This work is the first step in an ongoing, long-term effort with California Jobs First (formerly known as Community Economic Resilience Fund (CERF)), a program developed by the State of California's Governor's Office of Planning and Research (OPR), Office of Business and Economic Development (GO-Biz), and Labor and Workforce Development Agency (LWDA). Under this initiative, we have the opportunity to bring funding into our region to invest in and implement strategies that will promote a diversified and innovative Central Coast, creating high-quality, sustainable jobs that offer higher wages and opportunities for advancement, uplifting families and communities to not only survive, but thrive.

Traditional economic development approaches have been a key driver in creating opportunity and growth in our communities. As with anything, as communities grow and evolve, so must our practices, policies and frameworks for strategy and implementation. Inclusive economic development planning seeks to achieve balanced and equitable outcomes that benefit all segments of society, by adopting a comprehensive and holistic approach, integrating social equity and environmental sustainability into the process. Uplift is learning from and building upon traditional economic development practices, while also drawing in inclusive community driven economic strategies.

Inclusive economic development planning seeks to create a more sustainable and equitable economy by balancing economic growth with social inclusion and environmental stewardship. **We recognize that economic development should not only generate wealth, but also promote well-being, social cohesion, and environmental resilience. Drawing on this, Uplift brings in community and mission-driven elements**, such as a locally-based Research Committee, deep community engagement with a particular focus in disinvested communities, and a community-led governance model (see Figure 1A). These changes keep our communities centered in the co-creation of the region’s future, build a shared understanding of disparities in lived experience, uncover previously unseen and unaddressed challenges and opportunities, and create consensus around the fundable strategies to advance equitable, sustainable growth. Uplift’s stewardship of this community-centric process to the California Jobs First program is strengthening the network and ecosystem of stakeholders across the vast Central Coast region, building trust and transparency in the process, and modeling what high quality co-creation is capable of unlocking. This process is different from many that have come before and is continually evolving as we learn what works and what does not, and how to best meet the needs of our community and the realities of our economic landscape.

Building on the learnings from this phase of research, Uplift will shift into strategy development in 2024, which will involve pairing insights from the analysis with continued community input to identify specific and actionable ways to allocate resources to propel our mission and fulfill the vision of this community. The following report describes the community-informed data analysis that will serve as the underpinning of future economic strategy development.

Over the course of hundreds of meetings and thousands of hours of work, this report came together as a deeply collaborative effort. Uplift’s Vision, Steering, and Research Committee members provided invaluable input, feedback, and collaboration that shaped the research, engagement, and data narrative within this report and throughout the full lifecycle of the process. Though lifting a new initiative off the ground and co-creating an equitable process can at times be uncomfortable and challenging, their dedication and partnership has been instrumental in guiding this report, and our work at large. I am grateful and humbled to work alongside our talented and thoughtful team of staff, partners, committees, and community members who have given their time and talents to shape this work. **I am confident that together, we are well on our way to uplifting the Central Coast.**

Visit [UpliftCentralCoast.Org](https://UpliftCentralCoast.Org) to learn more about this work and join our growing coalition of collaborating organizations.

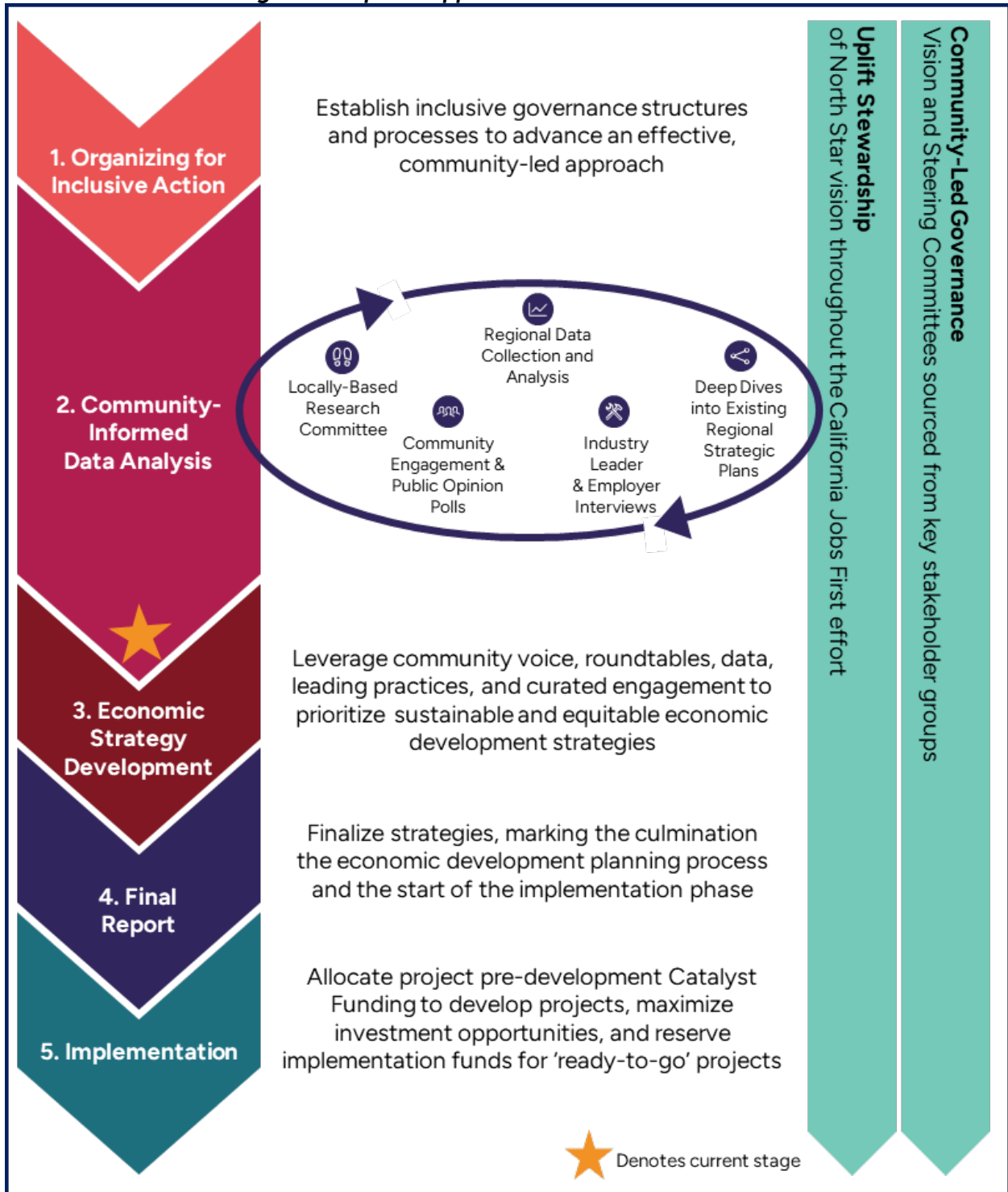
In partnership and solidarity,



**Quinn Brady**

Uplift Central Coast Project Director

**Figure 1A: Uplift's Approach to California Jobs First**



## Glossary

**Active Stakeholders:** Organizations that have been engaged with Uplift in one or more of the following ways (please note a list of all active stakeholders can be found in Annex 4): Signed a letter of support in July 2022; Signed a letter of support in May 2023; Applied to Uplift's September 2023 Community Based Engagement Services Contract; Received Uplift's September 2023 Community Based Engagement Services Contract; Met with Uplift to discuss, learn about, etc. Uplift and/or California Jobs First; Completed an interview with the Brookings Research Team; A member of the Vision and/or Steering Committees is a part of the organization; Hosted a Community Engagement Session, such as a Listening Session or a Community Convening.

**Annual Self-Sufficiency Standard (or Living Wage):** An annual compensation calculation established by analysis of regional costs that allows families to make ends meet while accumulating long-term and emergency savings.

**California Jobs First:** Formerly referred to as the California Economic Resiliency Fund (CERF), California Jobs First is program developed by the State of California's Office of Planning and Research (OPR), Office of Business and Economic Development (GO-Biz), and the Labor and Workforce Development Agency (LWDA) to promote a sustainable and equitable recovery from the economic distress of COVID-19 by supporting new plans and strategies to diversify local economies and develop sustainable industries that create high-quality, broadly accessible jobs for all Californians.

**California Jobs First Regional Collaborative:** Formerly referred to as the High Road Transition Collaborative (HRTC), these are economic develop organizations that represent California's 13 distinct regional economies and bring together diverse members of the labor, industry, and business sectors as well as community interests.

**Climate and Economic Justice Screening Tool (CEJST):** The Executive Office of the US President via the Council on Environmental Quality (CEQ) leverages datasets that are indicators of burdens to create indices in eight categories: climate change, energy, health, housing, legacy pollution, transportation, water and wastewater, and workforce development to create the Climate and Economic Justice Screening Tool (CEJST) index. The eight burden indices help give voice to the nature of cumulative burden in communities at the census tract level. The interactive CEJST map can be found at <https://screeningtool.geoplatform.gov/en/#7.93/34.728/-119.862>.

**Community Based Organization (CBO):** An entity, typically a nonprofit, whose purpose is aimed at supporting or improving a community generally or in a specific way/for a specific group of people within the community.

**Community Engagement Session:** Community-focused meetings including Listening Sessions, Community Convenings, or Community Updates.

**Community Convening:** Large, generalized public sessions to provide information, address questions, and solicit suggestions about Uplift and California Jobs First planning and implementation.

**Community Engagement Services Contract:** Agreements for an exchange of funding for services between Uplift and selected CBOs experienced in outreach and engagement to



diverse and underserved communities in one or more of the six counties that make up the Central Coast California Jobs First region. The funding aims to support CBOs to directly engage community members who would otherwise not be able to participate.

**Council on Environmental Quality (CEQ):** CEQ is located within the Executive Office of the US President and coordinates the federal government’s efforts to improve, preserve, and protect America’s public health and environment. CEQ directed the creation of the Climate and Economic Justice Screening Tool (CEJST) found at <https://www.whitehouse.gov/ceq/>.

**Disadvantaged Communities as defined by SB535 Tracts:** The California Environmental Protection Agency (CalEPA) formally designated four categories of geographic areas as components of disadvantage: 1.) Census tracts receiving the highest 25 percent of overall scores in CalEnviroScreen 4.0. 2.) Census tracts lacking overall scores in CalEnviroScreen 4.0 due to data gaps but receiving the highest 5 percent of CalEnviroScreen 4.0 cumulative pollution burden scores. 3.) Census tracts identified in the 2017 DAC designation as disadvantaged, regardless of their scores in CalEnviroScreen 4.0. 4.) Lands under the control of federally recognized Tribes. CalEPA created the Disadvantaged Communities Map which can be accessed here <https://oehha.ca.gov/calenviroscreen/sb535>.

**Disinvested Communities:** California Jobs First defines ‘disinvested communities’ as Census tracts identified as ‘disadvantaged’ by the California Environmental Protection Agency; Census tracts with median household incomes at or below 80 percent of the statewide median income or with the median household incomes at or below the threshold designated as low income by the Department of Housing and Community Development’s list of state income limits adopted pursuant to Section 50093 of the California Health and Safety Code; ‘high poverty area’ and ‘high unemployment area’ as designated by the California Governor’s Office of Business and Economic Development California Competes.

**Educational Attainment:** The level of formal education that an individual receives (e.g., graduating high school or college). Uplift acknowledges that this system does not capture other ways of receiving valuable education such as learning from peers, elders, or independently.

**Geographic Information Systems (GIS) Dashboard:** A system that creates, manages, analyzes, and maps all types of data.<sup>1</sup>

**Listening Session:** Mid-sized stakeholder-specific sessions tailored to receive feedback from a specific community, with priority for communities that have been historically left out of economic development planning processes.

**Prime-age workers:** Individuals between the ages of 25-54, a widely-recognized timeframe for peak labor market participation.

**Productivity:** As defined by the Bureau of Labor Statistics, productivity is “a measure of economic performance that compares the amount of goods and services produced (output) with the amount of inputs used to produce those goods and services.”<sup>2</sup>

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<sup>1</sup> Esri. “What is GIS”. Accessed December 13, 2023. <https://www.esri.com/en-us/what-is-gis/overview>.

<sup>2</sup> U.S. Bureau of Labor Statistics. “Productivity 101”. Accessed December 17, 2023. <https://www.bls.gov/k12/productivity-101/content/what-is-productivity>.

**Quality Job:** For the purposes of quantitative analysis in this report, a quality job is defined as: (1) paying an annualized living wage (established by analysis of regional costs and modeling of income required to improve self-sufficiency) that allows families to make ends meet while accumulating long-term and emergency savings; (2) offers employer-sponsored health insurance (a proxy for other worker benefits); and (3) provides worker stability in terms of retaining or leading to another quality job in the future.

From community members, Uplift heard that a quality job is also one that compensates workers enough to pay bills and save/invest some, provides adequate healthcare coverage, offers flexibility to take paid time off (sick leave and vacation), is free from discrimination, provides learning and growth opportunities, and/or contributes meaningfully to the community.

**Stakeholder Awareness Journey:** The Stakeholder Awareness Journey indicates the various levels of awareness of Uplift and California Jobs First and number of actively engaged stakeholders at each level.

**Stakeholder Benefit Matrix:** A table that assists Uplift in refining its engagement strategy, emphasizing interactions where stakeholders' awareness might be limited but may substantially benefit from the plan.

**Stakeholder Groups:** State of California designated categories of communities, causes, or industries to include in this California Jobs First process. Uplift acknowledges that identities are intersectional and that individuals may represent multiple stakeholder groups. Stakeholder groups for California Jobs First include Labor Organizations, Employers, Businesses and Business Associations, Grassroots and Community-Based Organizations, Government Agencies, Economic Development Agencies, Philanthropic Organizations, Education and Training Providers, Workforce Entities, Environmental Justice Organizations, Workers Centers, Disinvested Communities, and California Native American Tribes.

**Struggling Workers and Families:** Residents whose income (or whose families' income) does not enable them to afford a basic set of necessities, plus reserve some savings, according to customized analysis of regional costs of living.

**Traded Sector:** The traded sector consists of industries that sell goods and services to customers outside the region. For example, technology companies develop software and hardware products used around the country and the world. Similarly, the agriculture industry produces lettuces, strawberries, and other commodities sold in many markets. Because these industries "import" new money into the region by selling to external customers, they support broader local growth.

**Uplift Central Coast Coalition (Uplift):** A group of non-profits and community representatives who will collaboratively determine how to effectively use California Jobs First grants for maximum impact for Central Coast residents, creating a comprehensive plan for how to allocate resources.



# Introduction

— Goals of this Section —

- Explain Uplift’s approach to the California Jobs First program for regional economic development.
- Capture the story of the socioeconomic challenges and opportunities facing the region and driving the Uplift Central Coast initiative through quantitative data and lived experiences.
- Establish a common understanding of the goals of this report, the research inputs, and the process that informed its key takeaways.

— Top-Level Themes —

- Challenges to the day-to-day lives and well-being of Central Coast residents reflect larger shifts over recent decades in how the economy functions and who benefits.
- Economic development approaches are evolving to address these realities.
- Uplift Central Coast presents an opportunity to accelerate such efforts already underway in the region.

## Introduction

For Central Coast residents, pride in community sits alongside concerns about affordability. People deeply value a sense of place and family, yet are faced with moving out of the region for better economic opportunities. They enjoy the natural beauty of the region, but struggle with long commutes between home and job centers. They are welcoming of diversity, but are experiencing persistent, systemic injustices. These vignettes reflect the realities and contradictions of California’s Central Coast; a mosaic of topographies and communities situated between the Bay Area and Los Angeles where economic divides demand an urgent focus on creating more inclusive, sustainable opportunities.

Spanning Santa Cruz, San Benito, Monterey, San Luis Obispo, Santa Barbara, and Ventura Counties, the Central Coast Region encompasses parts of six distinct metropolitan economies, each with its own unique communities, engaged residents, economic advantages, and challenges. The region is home to an expanding innovation economy powered by high-wage, knowledge-intensive industries with sizable growth potential, including aerospace, defense, biotech, and precision manufacturing.

**Figure 1B: The Central Coast Region**



Figure 1B: Map of the Central Coast Region.

High-tech semiconductor and quantum activity clustered around University of California (UC) Santa Barbara's coastal campus, world-leading biotech innovation centered in the office parks of Thousand Oaks, first class space hub at Vandenberg Space Force Base (VSFB), and cutting-edge advanced air mobility startups taking root from Marina and Salinas down to San Luis Obispo and Ventura are all representative of these strengths. The region's vast farmland, beaches, forests, and rugged coastline alongside Highway 1 further fuel agriculture and tourism activity, while also giving residents access to some of the nation's finest natural environment.

The Central Coast is also home to significant numbers of disinvested communities and residents and families unable to make ends meet, squeezed by the intersection of low-wage work and high costs of living. The region's foothold in typically low-paying industries — agriculture, hospitality, local-serving retail, and tourism — means that many jobs do not offer workers the ability to sustain themselves and their families. Less than one-third of Central Coast jobs are considered "quality jobs," meaning that they pay an annualized living wage, offer employer-sponsored health insurance (a proxy for other worker benefits), and are likely to continue to lead to quality work in the future.<sup>3</sup> According to Central Coast residents, a "quality job" is also free from discrimination and contributes meaningfully to the community. High housing costs, lack of affordable childcare, long commutes, and other expenses reduce the buying power of earned wages and the overall quality of life.

These disparities also extend beyond the traditional economy. For instance, while the six counties that make up the Central Coast Region tend to have above average health outcomes, those positive outcomes are not experienced uniformly by residents: chronic health conditions, difficulties accessing quality health care, and environmental hazards are still prevalent in specific population groups.

### What is a "Disinvested Community"?

California Jobs First defines "disinvested communities" as specific areas with disproportionately high rates of people with lower incomes. While Uplift uses this term in alignment with the state's definition, Uplift acknowledges that these communities have been subjected to systemic injustice that results in disparities.

**"Duele ver cómo nos están orillando a irnos de aquí. Por la falta de vivienda y lo ridículamente caro que está."**

Listening Session in Monterey focused on Latina farmworkers

Translation:

*"It hurts to see how they are forcing us to leave here because of the lack of housing and how ridiculously expensive it is."*



<sup>3</sup> See definition and implications regarding "quality jobs" in the glossary and in the section titled "Strengthening Industry to Create Opportunity."


Data and lived experiences of local residents show that realities look different across the region, revealing there is no one singular Central Coast experience. The Central Coast is a large, diverse region and is not a monolith. Economic analysis of industries and worker commuting patterns, for instance, suggests that Monterey, San Benito, and Santa Cruz

Counties in the Northern part of the region and San Luis Obispo, Santa Barbara, and Ventura Counties in the Southern part of the region form their own distinct, but economically cohesive geographies. The two sub-regions have unique strengths, assets, challenges, industries, and socioeconomic dynamics. Sub-regional differences are also reflected across a range of issues, from industry performance to costs of living and access to education and training.

Effective and equitable solutions need to be tailored to the needs and aspirations of specific stakeholders, and require addressing unique sub-regional issues in parallel to addressing the larger region's challenges and opportunities. Achieving a more equitable Central Coast requires the region to balance aspiration with a critical examination of its core strengths and assets. The region boasts hardworking residents, innovative industries, and a world-renowned coastal environment. At the same time, many of its residents struggle to benefit from the region's growth, afford housing, or suffer the negative effects of environmental and climate hazards. To grow sustainably and equitably, the region must consider a range of interventions, including improving the number of quality jobs available in the Central Coast, bolstering training and education access, and advancing actions to lower barriers to economic opportunity and improve quality of life for all.

**"I teach for the outcome, not the income, so I enjoy it."**

Virtual Listening Session focused on the Black community



**"Es caro vivir acá. Necesitamos más vivienda de bajos ingresos. No es que nosotros queramos ser pobres. Este país nos está manteniendo pobres."**

Listening Session with Spanish-speaking women in rural areas

Translation:  
"It is expensive to live here. We need more affordable housing. It's not that we want to be poor. This country is keeping us poor."



Employing wide-ranging analyses that span the economy, labor market, environment, public health, and industry clusters, this report provides the data and community-driven evidence base from a diverse array of Central Coast stakeholders that informs and advances Uplift's vision as noted in Figure 1C.

## 1C: Uplift's Mission and Vision Statement



### OUR MISSION

To **uplift** our residents as we uplift our regional economy, growing from within to create transformative opportunities for more than 2 million people across 6 Central Coast counties.

### OUR VISION

Our goal is to create an inclusive economic resilience plan for the region through creative, community-led efforts.

## Uplift Central Coast and California Jobs First: Charting a Course to a More Sustainable, Equitable Future

The State's California Jobs First program has catalyzed an opportunity to analyze the Central Coast's competitive economic advantages, listen deeply to residents, explore possibilities, and devise a broad-based, inclusive approach to economic development that accelerates sustainable and equitable economic growth.

Formed by three area economic development organizations—Economic Development Collaborative (EDC), Monterey Bay Economic Partnership (MBEP), and REACH—Uplift Central Coast (Uplift) is a six-county partnership aimed at widening and deepening regional collaboration to attract investment and expand quality job opportunity for residents of the Central Coast. Guided by community voice, testimony, and experience, the coalition is managing an inclusive, diverse, transparent, and accountable regional planning process that is creating a holistic strategy with tactical recommendations for a series of investments to grow sustainable industries, diversify regional economies, and improve access to high quality jobs within the Central Coast Region.

Expanding access to economic opportunity, advancing equitable economic growth, and accelerating adaptation to the climate crisis represent Uplift's North Star (see Figure 2). These inputs form Uplift's goal and guide their approach to governance, community engagement, research, strategy development, and performance measurement.

**Figure 2: Uplift's North Star**

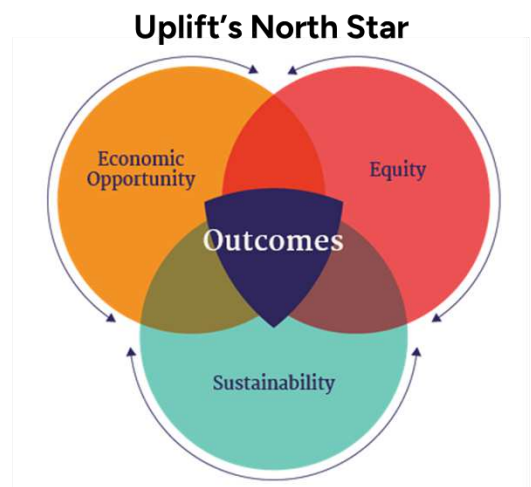


Figure 2: The Uplift Coalition was formed by EDC, MBEP, and REACH, with a North Star of Economic Opportunity, Equity, and Sustainability.

## About Uplift Central Coast

Uplift Central Coast (Uplift) is a growing coalition powered by Central Coast residents working together toward a shared vision of a sustainable, diverse, and equitable economy built by and for the region's residents. Uplift aims to:

- Develop a broad coalition that reflects the diversity of the Central Coast
- Facilitate a deliberately inclusive process that centers on the lived experience of historically disinvested communities
- Engage the full range of stakeholders through Listening Sessions and Community Convenings; issue and industry Roundtables; surveys and polling; community-based contracts; and strategic communications tailored to specific audiences
- Conduct a comprehensive analysis of the Central Coast industry profile and labor market as well as demographic and socioeconomic conditions
- Identify investments and activities needed to foster equitable economic growth and drive regional industry diversification
- Assess and prioritize possibilities based on established criteria
- Assemble an overarching approach that will increase residents' access to quality jobs, particularly within historically disinvested communities

Uplift is a collaboration between MBEP, REACH, and EDC who jointly applied to co-convene the Central Coast's California Jobs First (then California Economic Resilience Fund) coalition, backed by 129 letters of support.<sup>4</sup>

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<sup>4</sup> Letters of support were submitted in June 2022 and 2023 from all 12 California Jobs First constituencies. A full list of support-letter writers can be found in Annex 4. Additional details can be found in the section titled "Stakeholder Mapping."



**Figure 3: Overview of Uplift's Governance Structure**



Figure 3: Overview of Uplift's governance structure highlighting its committees which include representation from the 12 California Jobs First stakeholder groups.

**Figure 4: Uplift's Community Engagement Strategies**



Figure 4: Examples of Uplift's community engagement and outreach strategies.

As referenced in Figure 4, the Regional Steering Committee<sup>5</sup> is responsible for guiding the overall California Jobs First planning process, including an array of responsibilities such as approving processes; setting criteria, metrics, and priorities; and recommending projects for funding and/or inclusion in the final Regional Plan Part II. As the project advances, they will also be responsible for final decision making, including the final approval and adoption of the Regional Plan Part II and recommendations for support for implementation funding. The Northern and Southern Sub-Regional Steering Committees have balanced geographic representation from each of the tri-counties included in their respective sub-regions.

The Uplift Coalition and the Steering Committees seek advice from the Uplift Vision Committee on stakeholder integration, projects, and programs to ensure alignment to California Jobs First objectives through a lens of racial equity, social justice, resident voice, and overall accountability and integrity. The responsibilities of the Uplift Vision Committee include recommending Steering Committee composition, providing project reviews and

<sup>5</sup>Vision Committee members are listed in Annex 2, Steering Committee members are listed in Annex 3, and Uplift team members are listed in Annex 8.

recommendations to Steering Committees, and ensuring quality control for alignment to vision and guiding principles. Vision Committee members represent each of the six counties, and have deep expertise in equity, sustainability, and economic opportunity.

## The Modern Economy Demands a New Approach to Economic Development

Initiatives like California Jobs First reflect an ongoing evolution in economic development to address economic shifts that have narrowed opportunity for many U.S. regions and their residents. Over the past three decades, several major macroeconomic trends have transformed regional economies in the U.S. and abroad.

- **Globalization’s impact on places and workers:** Rapid acceleration of cross-border goods, services, and capital flows has altered where, how, and by whom it is competitive to produce and provide a range of economic activities. This has created a complex web of economic challenges and opportunities, ranging from the flight of mid-skill jobs to cheaper locations to the opening of new global markets for U.S. industries and foreign investment in local businesses and jobs.
- **Technology-induced changes to the nature of work:** Automation and digitalization of tasks and jobs is transforming skill demands and reducing employment in certain categories. This creates instability for workers in many industries. In general, trends favor knowledge-intensive activities that require “distinctly human” contributions, versus repetitive tasks.<sup>6</sup> These trends reinforce the importance of technology adoption for firm productivity and digital skills proficiency for workers, with jobs requiring higher levels of digital skills paying more on average and at lower risk of automation compared to low digital skill jobs.<sup>7</sup>
- **The concentration of economic growth in fewer places:** Twenty years ago, 125 U.S. counties accounted for 50 percent of the nation’s total growth in business establishments. Today, a group of just 20 counties does the same.<sup>8</sup> This dramatic concentration of economic power has resulted in an uneven distribution of high-quality job growth across the United States. As a result, it is more difficult for many smaller and mid-sized regions to generate inclusive economic growth.
- **A rapidly diversifying society:** Black, Indigenous, and People of Color disproportionately experience systemic and institutional oppression, which impact access to quality jobs. As the U.S. population evolves, communities of color will increasingly be the largest contributors to economic sustainability. As such, addressing issues of equity and inclusion is an imperative.

These major shifts have fundamentally altered how the economy operates, creating core challenges for nearly every mid-sized metropolitan area in the United States. They have powered the simultaneous expansion of high- and low-wage jobs and the hollowing-out of

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<sup>6</sup> Mark Muro, et al. “Automation and Artificial Intelligence: How machines are affecting people and places”. Brookings, January 2019. <https://www.brookings.edu/articles/automation-and-artificial-intelligence-how-machines-affect-people-and-places/>.

<sup>7</sup> Mark Muro, Sifan Liu, Jacob Whiton, and Siddharth Kulkarni. “Digitalization and the American Workforce”. Brookings Metro. November 2017, 21-22.

<sup>8</sup> Economic Innovation Group. “The New Map of Economic Growth and Recovery”. May 2016. 10.

middle-skill, mid-wage occupations. These shifts have also made it especially difficult for smaller and rural areas to prosper.

As a result, countless Americans have been forced to contend with reduced intergenerational economic mobility. While some 90 percent of individuals born in 1940 out-earned their parents (after accounting for inflation), only 50 percent of those born in the 1980s can say the same.<sup>9</sup> Taken together, these macroeconomic trends have made it much more difficult to generate broadly shared economic opportunity, reinforcing the importance of efforts like Uplift Central Coast to advance bold systemic policy and practice shifts, in alignment with a 21<sup>st</sup> century economic development approach.

Traditional approaches to economic development fall short of what is needed to create more equitable economies amid these challenges. Historically, economic development practitioners relied on a combination of business attraction, opportunistic deal-making, regional branding and marketing, and greenfield projects to drive economic growth.

Fostering equitable economic growth requires an updated approach to economic development that builds and expands on traditional approaches. This involves paying attention to both lowering barriers to economic opportunity (including with deep listening to community) and investing in the drivers of economic competitiveness: innovation-intensive industries, skilled workers, broad access to opportunity, a robust entrepreneurial ecosystem, and a vibrant small business community (see Table 1).

**“If it wasn’t for purchasing my home in the seventies, I wouldn’t be able to afford to live in Santa Cruz. I have a child that works out of state because they can’t afford to live here.”**

Listening Session in Santa Cruz



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<sup>9</sup> Raj Chetty et al. “The Fading American Dream: Trends in Absolute Income Mobility Since 1940.” *Science* 356(6336) 2017.

**Table 1: Comparing Conventional and 21<sup>st</sup> Century Economic Development Approaches**

Conventional Economic Development	21 <sup>st</sup> Century Economic Development
<ul style="list-style-type: none"> <li>• Core focus on economic growth as evidenced by job creation and tax base expansion</li> <li>• Emphasis on business attraction, capital investment, and greenfield projects</li> <li>• Prioritization of job growth with little if any attention to job quality</li> <li>• Reactive to short-term in-bound opportunities</li> <li>• Predominantly led by the private and public sectors</li> </ul>	<ul style="list-style-type: none"> <li>• Core, long-term focus on economic growth that delivers improved wages and quality of life for residents</li> <li>• Powered by innovation-intensive, globally competitive industries that create sustainable, long-term growth</li> <li>• Commitment to equity</li> <li>• Emphasis on investing in workers’ skills and talents</li> <li>• Supports entrepreneurship and small business development to spur economic dynamism and as a pathway to wealth-building</li> <li>• Attentive to the environmental and public health impacts and implications of industries and occupations</li> <li>• Cultivates strong economic “enablers” such as well-connected infrastructure and affordable housing</li> <li>• Relies on deep collaboration between different jurisdictions and organizations</li> <li>• Establishes intentional community partnerships to address systemic barriers and ensure broad access to opportunity</li> <li>• Practices ongoing community engagement and affirmation of collective efforts and strategy throughout project lifecycles</li> </ul>

This approach also recognizes that economic inequality can slow regional economic growth. Broadly shared economic prosperity promotes economic stability for everyone, which in turn encourages investment, entrepreneurialism, and intergenerational wealth-building.

In 21<sup>st</sup> century economic development, equity and access to opportunity are core principles, not afterthoughts. This approach understands that a regional economy cannot be considered truly successful if it only works for some residents while leaving others behind.

## Organizing for Equitable Economic Development

Achieving economic success requires coordination and dialogue within and across multiple levels of action: the region, local jurisdictions, and community. Actors at each level have specific expertise and capabilities that should be leveraged and combined for maximum effect. Collaboration across this entire ecosystem is essential for equitable economic growth. Groups engaged in Uplift span the 12 California Jobs First stakeholder groups: Labor Organizations, Employers, Businesses and Business Associations, Grassroots and Community-Based Organizations, Government Agencies, Economic Development Agencies, Philanthropic

Organizations, Education and Training Providers, Workforce Entities, Environmental Justice Organizations, Workers Centers, Disinvested Communities, and California Native American Tribes. Economic development activities are typically undertaken at three broad levels:

- **Regional economic development** focuses on large geographic areas encompassing one or more metropolitan area (e.g., REACH serves the Santa Maria-Santa Barbara and San Luis Obispo-Paso Robles metropolitan areas, which are coterminous with Santa Barbara and San Luis Obispo counties). At this broadest level of action, organizations aim to promote key industry clusters, strengthen the workforce, innovation, and infrastructure assets shared by local jurisdictions, advance policy action, and provide a framework to guide local efforts.
- **Local economic development** typically takes place at the city or county scale and addresses issues specific to those jurisdictions. Cities shape their local business climates via land use and zoning, site selection, permitting, licensing, and tax structures. Many also support entrepreneurship and small businesses, often with an emphasis on local-serving Main Street businesses.
- **Community development** also occurs at the local level and addresses dynamics specific to populations and communities. It typically uses geographically targeted initiatives and hyper-local strategies, such as community land trusts, focused workforce training and education programs, corridor redevelopment projects, and placemaking efforts. These efforts focus on helping residents increase their economic mobility and overcome barriers to access.

“The system created for white men is still run by white men, and it is not shifting.”

Listening Session in Santa Cruz



Evolving economic development practices have put a premium on bridging these levels of action. Regional economic development has become more strategic about ensuring that all residents have access to or benefit from innovative industries. Community development, in turn, has become more intentional about helping residents connect with employment opportunities in the broader regional economy, in addition to improving the quality of local places and well-being. While connecting these levels of action remains a work in progress, this cultural change is fundamental to achieving equitable economic development.

However, the vastness of the Uplift Central Coast region strains this paradigm and raises tensions over the focus of efforts (see Sidebar “Common Tensions in Equitable Economic Development Initiatives”). The Central Coast region includes all or parts of six distinct metropolitan areas (metropolitan areas are defined by the federal government as individual labor markets based on commuting flows). This mega-regional geography is thus unusually large for even regional economic development approaches, such as industry cluster strategies. At the same time, Uplift’s focus on equity elevates community development approaches that are typically undertaken at the local or hyper-local level, connecting into single-region strategies. It is highly unusual for community development efforts to be undertaken at a six-county level, given that they reflect the unique assets and barriers of specific groups and neighborhoods. These dynamics likely point to the need for sub-regional strategies as Uplift moves from research into strategy development.



## Common Tensions in Equitable Economic Development Initiatives

Equitable economic development initiatives are subject to a range of tensions, given the number of stakeholders and systems involved. As explored throughout this report, these include:

- **Setting the geography of action:** Recognizing the distinct dynamics and interventions available at different scales (i.e., regional, local, community), the interplay between these scales, and the appropriate approaches for addressing specific opportunities and challenges.
- **Balancing aspiration with realistic strategies:** Combining a bold vision for addressing deep, systemic challenges with concrete, achievable interventions.
- **Prioritizing among many interests:** Focusing on specific challenges and opportunities, and making difficult trade-offs based on data and community choices to distribute available resources.
- **Weighing demand-side and supply-side needs:** Balancing emphasis between industry interventions to close the quality jobs deficit and worker / community-focused programs to address barriers and improve overall well-being.
- **Recognizing there are multiple paths to improving job quality:** Acknowledging that job creation is complementary to strategies like worker empowerment, public policy and regulation, and cost reduction – not mutually exclusive.
- **Promoting economic / workforce development system alignment:** Aligning economic and workforce systems to focus on a shared vision and objectives for quality job creation and access, despite conflicting requirements, traditional roles, and incentives.
- **Addressing the evolving role of community engagement:** Syncing quantitative data with community input, while meeting deadlines and maintaining long-term community-led engagement from design through planning and ongoing implementation.

Source: Brookings / Cities GPS.

## Research Provides a Foundation for Strategy Development

Over the past six months, Uplift undertook extensive quantitative and qualitative research to establish a deep understanding of the regional economic landscape and provide a solid starting point for strategy development and implementation design in 2024.

This report sets out the foundational data analysis and insights developed during Phase I that will ground Uplift’s work in the months ahead. It presents a shared understanding of the core economic challenges facing the region as well as a realistic view of the Central Coast’s assets and opportunities. Unlike conventional economic development, which tends to focus narrowly on public- and private-sector actors, this report brings together quantitative analysis, qualitative research, and local knowledge gathered through extensive and ongoing community engagement. As a result, it reflects the concerns, aspirations, and priorities of a broad range of stakeholders from the regional private, public, nonprofit, community, and philanthropic sectors.

This report also sets out the shared philosophy and framework for inclusive economic development. These core principles empower stakeholders to collectively set objectives, make informed decisions, and monitor progress over time. These principles also provide criteria for the strategic trade-offs that will inevitably be required to make the most of limited resources. Once the California Jobs First process is complete, this philosophy and framework will continue to structure economic development in the region.

In anticipation of the implementation phase of the California Jobs First project, this report begins to identify the actors in the region that will need to collaborate on design and delivery once strategy development is complete. By the end of the California Jobs First planning process, Uplift will have assembled a clear and cohesive suite of strategies as well as an actionable plan that delegates responsibilities, sets out next steps, and establishes performance metrics (see Figure 1A). This focus on action will ensure that the tactics outlined in the final report are realized during implementation.

## Research and the Uplift California Jobs First Process Overview

Research builds an evidence-based platform for collaboration and strategic action, helping stakeholders explore the current situation in depth, surface possibilities for the future, and establish a shared vocabulary and common principles for collaborative action. Quantitative analysis, qualitative research, and community engagement each offer vital insights into the on-the-ground realities of the Central Coast economy. Together, they provide a candid picture of the region's competitive position and potential economic opportunities.

**Quantitative analysis** examined hundreds of indicators to surface insights into regional economic performance, key economic drivers, labor market dynamics, industry clusters, and public health and environmental trends. Research drew on public data sources (e.g., U.S. Census, Bureau of Labor Statistics) as well as proprietary data sets (e.g., Lightcast, Dun & Bradstreet, Pitchbook). These data sets were analyzed across a number of dimensions, including shift-share decomposition and job concentrations by North American Industry Classification System (NAICS) industry classification, traded versus local-serving status, advanced industry status, and supply chains.

This report also employs several novel empirical methods, including an Opportunity Industries approach that assesses industry subsectors for quality job concentration and an Intraregional Value Chains analysis that highlights hyperlocal firm relationships across industry sectors as well as among companies with common talent needs. In all, these sources and methods reflect leading practices for producing reliable and valid empirical research.

Note: This report features main themes and highlights of the extensive quantitative research produced for Uplift Central Coast. Additional analysis, including further geographic and demographic breakdowns, can be accessed via the [Uplift Central Coast Databook](#).<sup>10</sup>

**Qualitative research** brought together desk research, interviews, and active engagement with stakeholders from the public, private, community, academic, and nonprofit sectors. Focused conversations with specific firms, intermediaries, program delivery and service providers, and

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<sup>10</sup> Full URL:

[https://www.canva.com/design/DAF5fyb25pA/uL\\_rdXelCB9sE46daYHsJA/view?utm\\_content=DAF5fyb25pA&utm\\_campaign=designshare&utm\\_medium=link&utm\\_source=editor](https://www.canva.com/design/DAF5fyb25pA/uL_rdXelCB9sE46daYHsJA/view?utm_content=DAF5fyb25pA&utm_campaign=designshare&utm_medium=link&utm_source=editor) .

other key actors provided opportunities to reality-test quantitative findings and gather insights from those involved in the day-to-day operations of the regional economy.

**Community engagement** extends qualitative research by inviting active participation from residents, workers, and others whose voices have historically been excluded from economic development. Listening Sessions, surveys, polls, and other outreach provided direction and validation grounded in lived experience. Insights gained through community engagement and qualitative research provided a deeper appreciation of the concerns and goals of specific demographics and the real-world implications of potential actions.

Uplift also convened a **Research Committee** consisting of geographically representative experts with backgrounds in applied analysis of local economic, demographic, health, and environmental trends, drawn from university and community college centers, government, and other institutions. The Committee's scope includes providing guidance and input on research activity to ensure content is locally-informed and validated, and helping identify data for topics where information is limited from external sources or tailored by local collection.

These intertwined strands of research collectively provide a set of lenses that can help stakeholders identify possibilities and make choices about strategic priorities during the next phase of the California Jobs First process.

## Community Engagement Purpose, Process, and Themes

Uplift is working with communities across the Central Coast to co-develop a sustainable, equitable economic development plan that is for the people, by the people, and reflective of the strengths and aspirations they have for themselves and future generations. Therefore, meeting people where they are and understanding how they envision inclusive prosperity through community engagement is an essential part of this community-driven planning process. To hear directly from everyday people who live on the Central Coast, Uplift facilitated Community Convenings, Listening Sessions, and a public opinion poll from June through December 2023. Uplift aligned community engagement activities with its research objectives, including gathering input on perceptions of economic opportunity and quality job access. In partnership with local organizations, Uplift hosted 34 community engagement sessions as of December 2, 2023, with a total of about 1,600 community members in attendance. With the support of SJR Opinion Research, Uplift conducted a public opinion poll reaching 1,200 community members. Insights shared by community members through these methods contribute to Uplift's understanding of lived experiences and perspectives that will inform the Central Coast region's economic development strategy.

## Inclusive community engagement efforts to expand access

Equity is one of the three elements of Uplift’s North Star that guides this full process (see Figure 2). In that spirit, Uplift took intentional measures to collaboratively run an inclusive process that invites people to the table who have historically been left out of these conversations and decision-making. Unlike traditional economic development planning efforts, Uplift established an Inclusivity Fund to provide essential partners with resources to participate in Uplift’s California Jobs First planning process. This fund promotes inclusive engagement by prioritizing under-resourced community members. Between June 17 and December 2, 2023, the Inclusivity Fund distributed over 1,000 stipends to community members who otherwise would not have been able to participate. Each stipend provides up to \$100 per day to resource-eligible community members for their participation in California Jobs First activities.

Eligible participants may request stipends for up to five meetings (\$500 max). Interested individuals may self-certify eligibility for inclusivity funding at the beginning of each Community Convening, Roundtable, or Listening Session via a Statement of Eligibility Form. Gift cards are issued at the end of each community meeting to eligible participants requesting resources. Individuals must meet the criteria as a disinvested community member as defined by California Jobs First<sup>11</sup> or belong to at least one of the following population categories: Low-income; non-English speaking; non-US citizens; people of color; lesbian, gay, bisexual, transgender, queer, intersex, asexual (LGBTQIA); youth; older adults; people with disabilities; people experiencing homelessness; outdoor workers; caregiver or dependent caregiver; Indigenous people; Native Americans; and members of Tribal Nations; and any intersection thereof. In addition to the Inclusivity Fund, community engagement sessions were held at various times of day to accommodate different schedules, at venues familiar to the community, and in multiple languages (English, Spanish, and Mixtec) with live interpretation services. Uplift is committed

### Example of Barriers to Getting a Quality Job

“Para estudiar piden colegiatura y no puedo optar a becas porque no tengo documentos. El cuidado de niños, mi hija tiene dos años y solo he podido trabajar part time. Hay oportunidades pero las pierdo por el estatus migratorio. He podido trabajar con la comunidad, y podría seguir trabajando en eso, pero el estatus migratorio y ser mamá me aleja de tener esas asistencias.”

Listening Session with Spanish-speaking Latina women in rural areas

This Spanish-speaking Latina mother of a two-year-old shared that she cannot apply for scholarships for higher education because she does not have the documents. Without childcare, she can only work part-time. While there are opportunities, she loses them due to her immigration status. She has been able to work with the community and will continue to, but her immigration status and role as a mother keep her from getting the assistance she needs.

<sup>11</sup> California Jobs First defines ‘disinvested communities’ as Census tracts identified as ‘disadvantaged’ by the California Environmental Protection Agency; Census tracts with median household incomes at or below 80 percent of the statewide median income or with the median household incomes at or below the threshold designated as low income by the Department of Housing and Community Development’s list of state income limits adopted pursuant to Section 50093 of the California Health and Safety Code; ‘high poverty area’ and ‘high unemployment area’ as designated by the California Governor’s Office of Business and Economic Development California Competes.

to continuously improving its inclusivity efforts and welcomes sustained community member participation into the strategy phase of this effort.

## Community Convening and Listening Session goals

Community Convenings and Listening Sessions were held to gather community insights based on participants' lived experiences to inform plans for a more viable, equitable, and sustainable regional economy. **Community Convenings** are large, generalized public sessions to provide information, address questions, and solicit suggestions about Uplift and California Jobs First planning and implementation. Community Convenings have most prominently been attended by representatives from nonprofits focused on economic development or related topics and representatives from local government.

**Listening Sessions** are mid-sized stakeholder-specific sessions tailored to receive feedback from a specific community, with priority for communities that have been historically left out of economic development planning processes. Listening Sessions have most prominently been attended by representatives from communities who have been historically left out of economic development processes, including Spanish and Mixtec speakers, African Americans, Indigenous communities, and farmers.

"I feel good because this is the first time that we have been invited to the table."

Virtual Listening Session focused on the Black community



During these sessions, Uplift listens to understand the barriers and challenges that individuals experience in their community to better identify and address inequities; asks individuals to share their hopes, desires, and aspirations for the region; fosters dialogue, partnership, and co-creation of solutions that address identified barriers; and obtains individuals' input on California Jobs First requirements. Community input gathered through Community Convenings and Listening Sessions informed this report and will continue to inform Uplift's Regional Plan Phase II, which will aim to build long-term community connection and resiliency.<sup>12</sup>

To expand Uplift's capability to reach a wide variety of community members from disinvested communities across the Central Coast Region, Uplift initiated contracts with 17 Community-Based Organizations (CBOs).<sup>13</sup> The organizations shown in Figure 5 will host additional Listening Sessions from February 2024 through April 2024. Selected CBOs focus on reaching houseless individuals, disadvantaged youth, low-income residents, immigrants, farmworkers, labor unions, Latinx communities, federally unrecognized Nations/Tribes, people with disabilities, LGBTQIA+, Black communities, and women.

<sup>12</sup> Insights from participants were noted anonymously and will not be attributed to individuals without their consent.

<sup>13</sup> Applications for Uplift's Community Engagement Services Contract were open from August 11 – September 11, 2023. Uplift received 49 applications and down-selected awardees in partnership with the Vision and Steering Committee based on criteria including geographic scope, demographic served, and sub-regional equity.

Additionally, in 2024, Uplift will host Roundtables, which are small industry- or topic-specific discussions. During Roundtables, Uplift will gather input from industry leaders on their needs and their capabilities for addressing the community’s stated priorities.

**Figure 5: Uplift’s Community-Based Organization Partners for the Community Engagement Services Contracts**

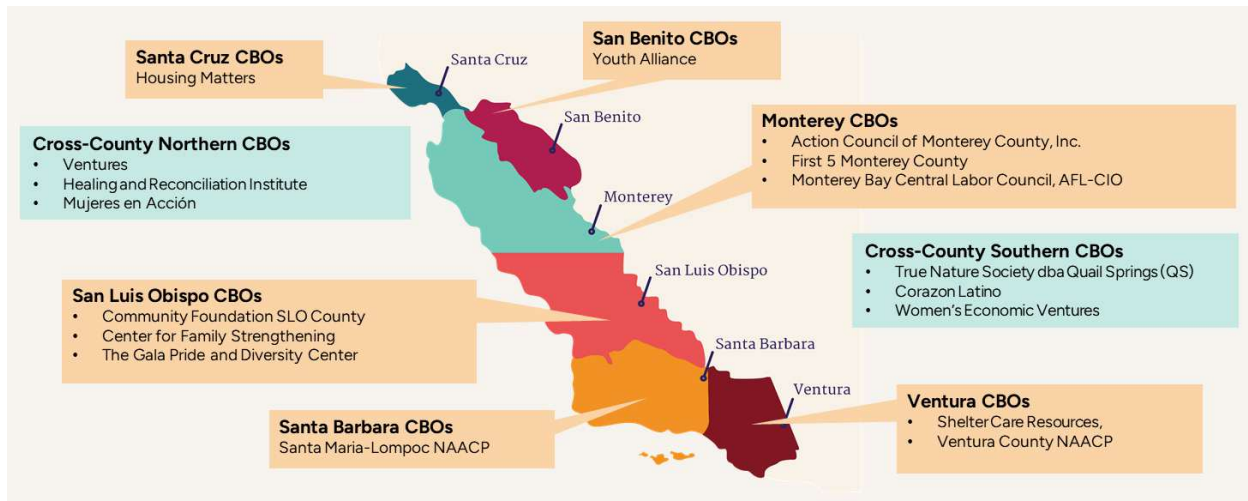


Figure 5: Geographic overview of the community-based organizations (CBOs) selected for the Community Engagement Services Contracts.

## SWOT Analysis Overview

Drawing from data referenced throughout this report, Uplift conducted an in-depth analysis of the Central Coast’s Strengths, Weaknesses, Opportunities, and Threats (SWOT) related to equitable economic resilience and growth of sustainable industry clusters. This SWOT analysis (see Figure 6) reflects the current status of the region and may benefit from revisiting and updating as applicable throughout Uplift’s strategy development process. A combination of quantitative and qualitative research informs this analysis, which Uplift and other regional leaders may use to identify strengths to build upon, weaknesses to address, opportunities to capture, and threats to mitigate and prepare for when shaping the more inclusive, sustainable economy of the Central Coast’s future.

SWOT analyses are comprised of the following four components:

- **Strengths** – Positive assets, resources, and characteristics that can be leveraged and built upon to grow a more inclusive and sustainable regional economy.
- **Weaknesses** – Liabilities and barriers to economic development and quality of life that could limit economic growth potential.
- **Opportunities** – Competitive advantages and positive trends that hold potential for the attraction of new businesses, investments, skilled workers, and more quality jobs.
- **Threats** – Unfavorable factors and trends that are and could continue to negatively affect the regional economy.



Figure 6: High-Level Central Coast SWOT Analysis



Figure 6: Overview of the Strengths, Weaknesses, Opportunity, and Threats (SWOT) Analysis. A more detailed SWOT Analysis can be found in Annex 1.

### — Challenges and Limitations of Uplift’s California Jobs First Planning Process —

- Uplift has held one Community Convening in San Benito County, so this report reflects less robust community input from San Benito County than other counties. Uplift is partnering with Community Based Organizations to further engage San Benito County in the first half of 2024 before the final report submission.
- Many community members applaud and report high levels of satisfaction with Uplift’s inclusivity efforts, while some focus on encouraging Uplift to enhance the equity of their processes. This presents a challenge given limited time and resources, but also provides the gift of constructive feedback which has already resulted in process improvements.
- Uplift has had to reconcile diverging philosophies on economic development focus and approaches (see Sidebar “Common Tensions in Equitable Economic Development Initiatives” earlier in this Section).

# Understanding the Central Coast

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### — Goals of this Section —

- Introduce underlying geographic, demographic, health, and environmental trends that shape the Central Coast’s economy and the lives of its people, providing a foundation for understanding deeper challenges and opportunities.
- Explore community insights regarding the experience of living in the Central Coast and barriers to equitable economic development.
- Explore how these trends vary from place to place, resulting in different socioeconomic outcomes and implications for solutions.

### — Top-Level Themes —

- Over a million Central Coast residents belong to families who struggle to make ends meet. This means that extremely high numbers of workers and families of varying demographics and educational levels struggle to afford basic necessities.
- Many of these struggling workers are at an age when people are often starting or actively raising a family, contributing to generational challenges around poverty and economic mobility.
- Steep costs and limited availability of housing and childcare are among the factors driving many Central Coast residents to question the feasibility of remaining in the region.
- Significant environmental hazards and climate change impacts are unequally distributed with some populations and communities experiencing disproportionate burden.
- Disparities underlie above-average aggregate public health outcomes.
- Demographics vary between each county, where areas like San Luis Obispo and Santa Cruz Counties are predominantly white compared to San Benito and Monterey Counties, where populations are mainly Hispanic or Latino/x/e.

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## Understanding the Central Coast

While the creation of and access to quality jobs is a fundamental part of any equitable regional economic strategy, these elements alone are not sufficient to advance equitable economic growth. A variety of other issues impact the well-being of Central Coast residents and their ability to thrive including, housing affordability, childcare access, public health, and exposure to environmental hazards. Specific communities — including, but not limited to residents who are Black, Indigenous, and People of Color, members of lower-income households, the disabled, formerly incarcerated individuals, and undocumented residents—face systemic and institutional obstacles that require targeted interventions to address and advance equity.

Achieving broadly shared economic prosperity for all requires investment of public and private resources to create a strong support ecosystem and long-term strategies capable of removing barriers to success. These actions take a wide range of forms and address a host of wraparound concerns, including expanding access to childcare and transportation, boosting housing development near job centers, enhancing language training and education for English

and other commonly spoken languages, and promoting mobile services and workforce training meeting populations where they are. Novel approaches and better coordination among businesses and service providers can improve outcomes and increase labor force participation for those facing the greatest challenges in the regional economy.

This section describes the barriers faced by Central Coast residents and offers context on the region’s population, as a precursor to exploring industry and labor market opportunities.

## 1. While demographics vary across the Central Coast, the Hispanic/Latino/x/e population is growing in each county.

The six Central Coast counties each display significant variations in population size (see Figure 7). This dispersion underscores the need for collaborative regional approaches as well as focused, tailored initiatives in smaller geographic areas. Given the vast size of the Central Coast, it is important to understand how individual counties in the region compare to each other, as well as the broader State of California and the country, to inform effective strategies.

**Figure 7: Population by County, 2010-2020<sup>14</sup>**

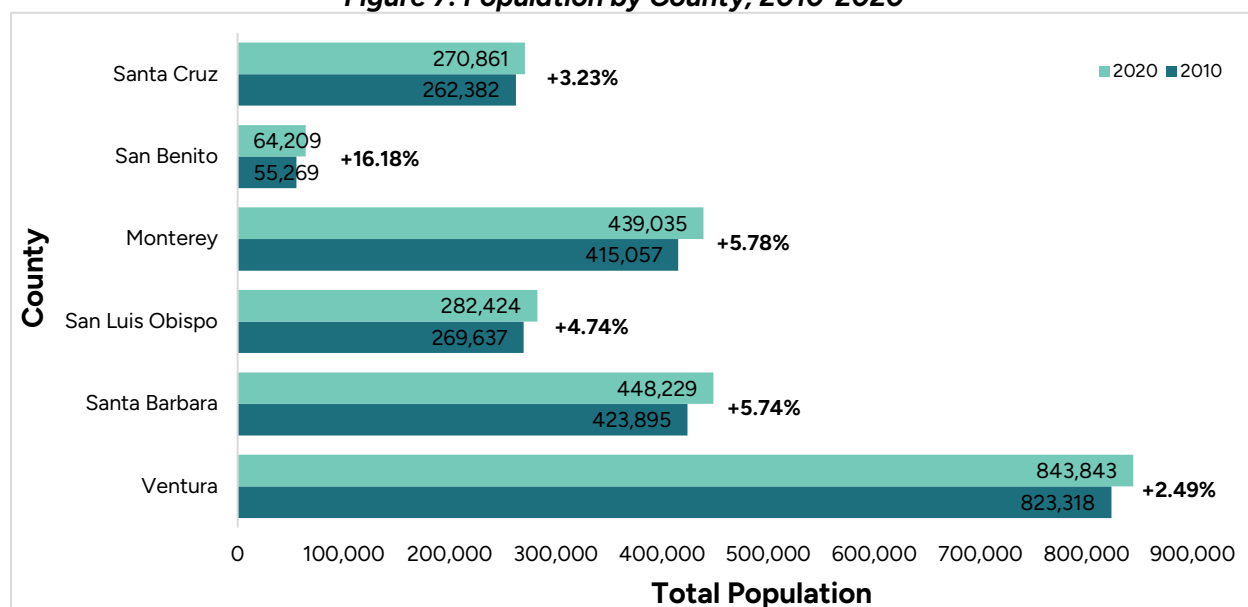


Figure 7: Population and increase in population from 2010 to 2020 in each of the counties on the Central Coast. Comparatively the population of California grew by 6.13 percent while the U.S. grew by 7.35 percent. Source: U.S. Census Bureau.

Census data shows that the population grew in each county between 2010 and 2020. The growth varied based on county, with San Benito’s population increasing by 16.18 percent on the higher end and Ventura’s population increasing by just 2.49 percent. Despite this, the

<sup>14</sup> U.S. Census Bureau, "TOTAL POPULATION," 2010. Decennial Census, DEC Summary File 1, Table P1, 2010, accessed on December 4, 2023, [https://data.census.gov/table/DECENNIALSF12010.P1?q=Population Total&g=040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2010&d=DEC Summary File 1](https://data.census.gov/table/DECENNIALSF12010.P1?q=Population Total&g=040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2010&d=DEC Summary File 1). U.S. Census Bureau, "TOTAL POPULATION," 2020. Decennial Census, DEC Demographic and Housing Characteristics, Table P1, 2020, accessed on December 4, 2023, [https://data.census.gov/table/DECENNIALDHC2020.P1?q=Population Total&g=040XX00US06\\_050XX00US06001,06037,06053,06069,06075,06079,06081,06083,06085,06087,06111&y=2020&d=DEC Demographic and Housing Characteristics](https://data.census.gov/table/DECENNIALDHC2020.P1?q=Population Total&g=040XX00US06_050XX00US06001,06037,06053,06069,06075,06079,06081,06083,06085,06087,06111&y=2020&d=DEC Demographic and Housing Characteristics).

growth rates in the Central Coast Region (excluding San Benito County) were even lower than the U.S. which grew by 7.35 percent and the state which grew by 6.13 percent. It is also important to note that roughly 7.7 million people moved from California to other states during this period.<sup>15</sup> Concurrently, the trend of population growth decelerated in the State of California and United States between 2010 and 2020.

As shown in Figure 8, the number of actively engaged stakeholders participating in the Central Coast’s California Jobs First planning process<sup>16</sup> per county generally increases as population increases, with the exception of Ventura County.

**Figure 8: Stakeholders by Population per County, 2020<sup>17</sup>**

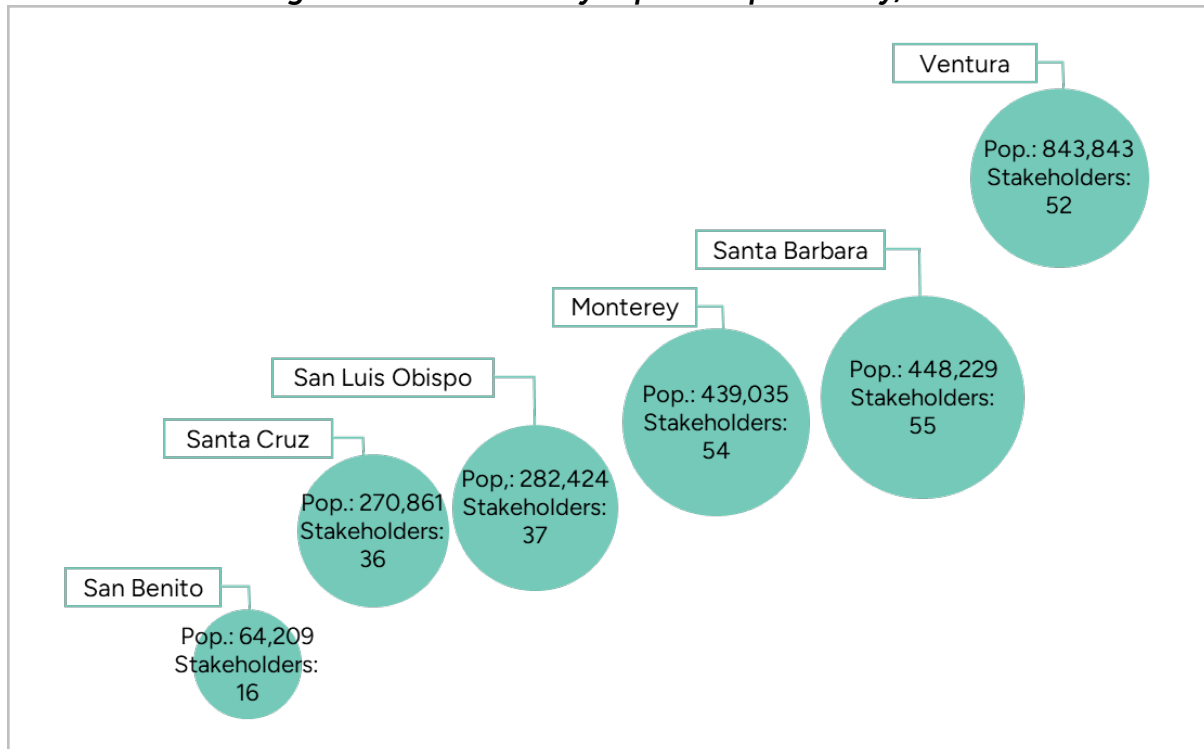


Figure 8: The population of each county compared to the number of actively engaged stakeholders in each county. Source: U.S. Census Bureau.

The Central Coast is located between the Bay Area<sup>18</sup> and Los Angeles County, which both have significantly higher populations compared to the Central Coast. As shown in Figure 9, the Central Coast experienced a higher growth in population than Los Angeles County but lagged behind the Bay Area from 2010 to 2020.

<sup>15</sup> Public Policy Institute of California, “Who’s Leaving California – and Who’s Moving In?”, Accessed August 08, 2023, from: [www.ppic.org/blog/whos-leaving-california-and-whos-moving-in/](http://www.ppic.org/blog/whos-leaving-california-and-whos-moving-in/).

<sup>16</sup> For more details on the actively engaged stakeholders, please see the “Stakeholder Mapping” section or Annex 4.

<sup>17</sup> U.S. Census Bureau, “TOTAL POPULATION,” 2020. Decennial Census, DEC Demographic and Housing Characteristics, Table P1, 2020, accessed on December 4, 2023, <https://data.census.gov/table/DECENNIALDHC2020.P1?q=Population> Total&g=040XX00US06\_050XX00US06001,06037,06053,06069,06075,06079,06081,06083,06085,06087,06111 &y=2020&d=DEC Demographic and Housing Characteristics.

<sup>18</sup> The Bay Area includes the following counties: Alameda, Contra Costa, Marin, Napa, San Mateo, Santa Clara, Solano, Sonoma, and San Francisco.



**Figure 9: Populations by Regions Surrounding the Central Coast, 2010-2020<sup>19</sup>**

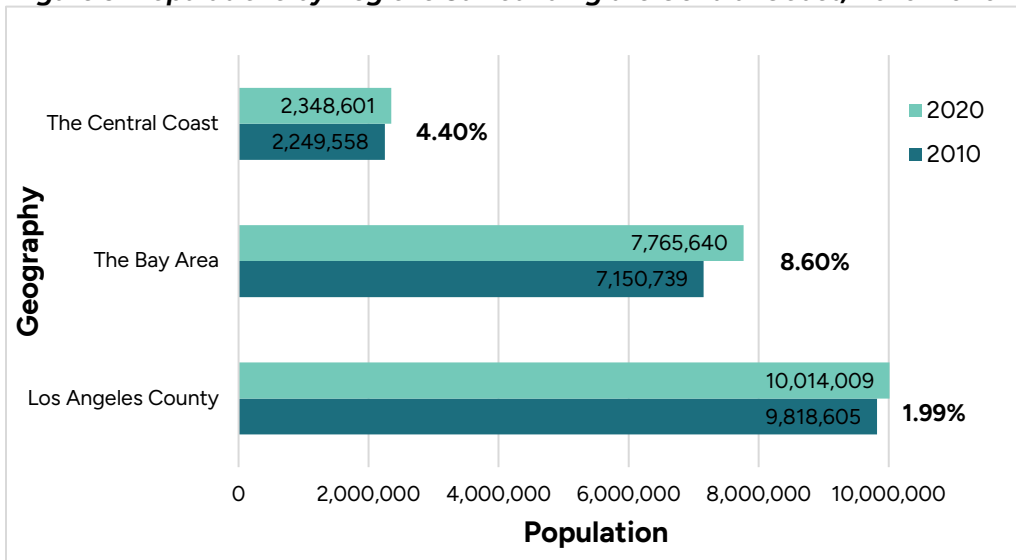


Figure 9: The population of the Central Coast compared to the Bay Area and Los Angeles County in 2020 and 2010. Source: U.S. Census Bureau.

When analyzing the ethnic and racial demographics across the Central Coast, Census data<sup>20</sup> shows that demographics across the Central Coast exhibit variations internally and in relation to state and national statistics. Overall, each county on the Central Coast has a higher percentage of Hispanic or Latino/x/e residents compared to the U.S. average. Central Coast counties also have a lower percentage of Asian and Black or African American residents compared to the State of California size (see Figure 10).<sup>21</sup>

As a point of note regarding data in this section, Uplift is reflecting the language and data collected and reported by the Census Bureau in Figures and within the narrative based on the binary gender/sex (male, female) presented by the U.S. Census Bureau American Community Survey (ACS).<sup>22</sup> The ACS survey includes a question that intends to capture current sex. There are no questions about gender (terms such as "transgender," "non-binary," and "gender nonconforming" all refer to gender, not sex), sexual orientation, or sex at birth" asked in the Census data. Likewise, Uplift is reflecting language used by Census for race and ethnicity data

<sup>19</sup> U.S. Census Bureau, "TOTAL POPULATION," 2010. Decennial Census, DEC Summary File 1, Table P1, 2010, accessed on December 4, 2023, [https://data.census.gov/table/DECENNIALSF12010.P1?q=PopulationTotal&g=040XX00US06\\_050XX00US06001,06013,06037,06041,06053,06055,06069,06075,06079,06081,06083,06085,06087,06095,06097,06111&y=2010&d=DEC Summary File 1](https://data.census.gov/table/DECENNIALSF12010.P1?q=PopulationTotal&g=040XX00US06_050XX00US06001,06013,06037,06041,06053,06055,06069,06075,06079,06081,06083,06085,06087,06095,06097,06111&y=2010&d=DEC Summary File 1).

U.S. Census Bureau, "TOTAL POPULATION," 2020. Decennial Census, DEC Demographic and Housing Characteristics, Table P1, 2020, accessed on December 20, 2023, [https://data.census.gov/table/DECENNIALDHC2020.P1?q=PopulationTotal&g=040XX00US06\\_050XX00US06001,06013,06037,06041,06053,06055,06069,06075,06079,06081,06083,06085,06087,06095,06097,06111&y=2020&d=DEC Demographic and Housing Characteristics](https://data.census.gov/table/DECENNIALDHC2020.P1?q=PopulationTotal&g=040XX00US06_050XX00US06001,06013,06037,06041,06053,06055,06069,06075,06079,06081,06083,06085,06087,06095,06097,06111&y=2020&d=DEC Demographic and Housing Characteristics).

<sup>20</sup> Please note that incarcerated individuals are included in the population counts of where they are imprisoned. Source: NPR. "Your Body Being Used: Where Prisoners Who Can't Vote Fill Voting Districts". December 31, 2019. Accessed December 10, 2023. <https://www.npr.org/sections/codeswitch/2019/12/31/761932806/your-body-being-used-where-prisoners-who-can-t-vote-fill-voting-districts>.

<sup>21</sup> Please note that when referencing U.S. Census data for demographics, Uplift uses the terms reflected in the U.S. Census Bureau's data tables.

<sup>22</sup> U.S. Census Bureau, "Why We Ask Each Question: Sex," Accessed on December 11, 2023, from <https://www.census.gov/acs/www/about/why-we-ask-each-question/sex/>.

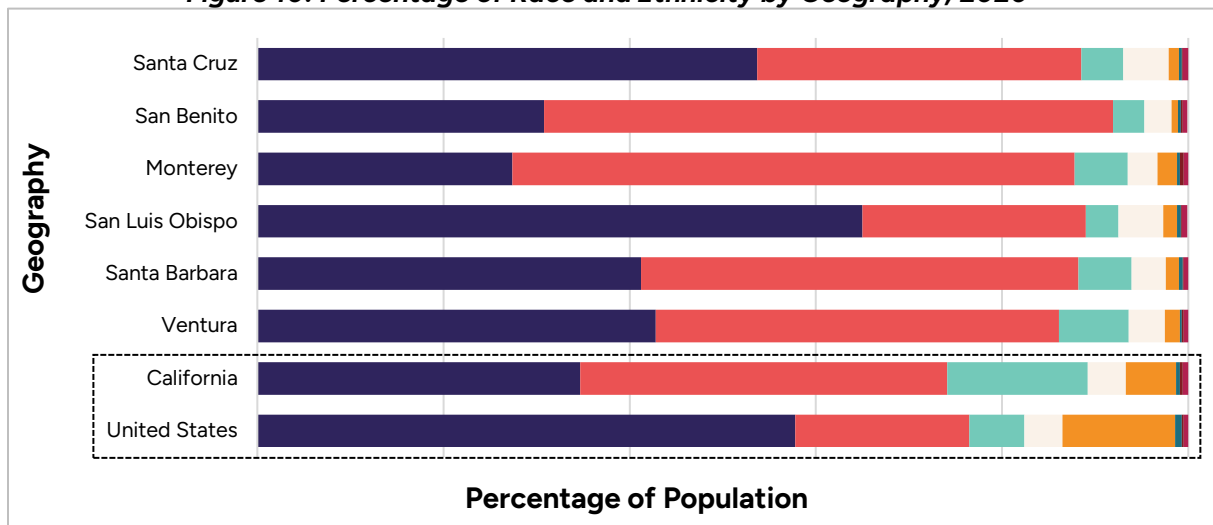
including Black or African American, American Indian and Alaska Native, Asian, and Hispanic or Latino. Uplift acknowledges that Central Coast residents often identify their gender or sex and their race or ethnicity using different language. In later sections of this report especially when discussing stakeholder engagement, the report will reflect language communities use to self-describe which may or may not align with Census designations. To support peer review and replication of findings, Uplift uses Census language when describing analysis that leverages Census data sets.

**“If you look at the Black population in Santa Barbara in 1980 and then you look at the Black population in Santa Barbara today, you can see a huge decline. This decline is based on housing and the issues with jobs [...] younger people can’t even dream of buying a home here, ever.”**

Listening Session in Santa Barbara focused on the Black community



**Figure 10: Percentage of Race and Ethnicity by Geography, 2020<sup>23</sup>**



- Legend**
- White Alone (Not Hispanic or Latino)
  - Hispanic or Latino
  - Asian Alone (Not Hispanic or Latino)
  - Black or African American Alone (Not Hispanic or Latino)
  - American Indian and Alaska Native Alone (Not Hispanic or Latino)
  - Native Hawaiian and Other Pacific Islander Alone (Not Hispanic or Latino)
  - Two or More Races (Not Hispanic or Latino)
  - Some Other Race Alone (Not Hispanic or Latino)

	White Alone (Not Hispanic or Latino)	Hispanic or Latino	Asian Alone (Not Hispanic or Latino)	Two or More Races (Not Hispanic or Latino)	Black or African American Alone (Not Hispanic or Latino)	American Indian and Alaska Native Alone (Not Hispanic or Latino)	Native Hawaiian and Other Pacific Islander Alone (Not Hispanic or Latino)	Some Other Race Alone (Not Hispanic or Latino)
<b>Santa Cruz</b>	53.7%	34.8%	4.5%	4.9%	1.1%	0.3%	0.1%	0.6%
<b>San Benito</b>	30.8%	61.1%	3.4%	2.9%	0.7%	0.3%	0.2%	0.5%
<b>Monterey</b>	27.4%	60.4%	5.7%	3.2%	2.1%	0.3%	0.4%	0.5%
<b>San Luis Obispo</b>	65.0%	24.0%	3.5%	4.8%	1.5%	0.4%	0.1%	0.6%
<b>Santa Barbara</b>	41.2%	47.0%	5.7%	3.7%	1.4%	0.4%	0.1%	0.5%
<b>Ventura</b>	42.8%	43.3%	7.5%	3.9%	1.6%	0.2%	0.2%	0.5%
<b>California</b>	34.7%	39.4%	15.1%	4.1%	5.4%	0.4%	0.3%	0.6%
<b>United States</b>	57.8%	18.7%	5.9%	4.1%	12.1%	0.7%	0.2%	0.5%

Figure 10: The percentage of race and ethnicity in each county of the Central Coast Region compared to the United States and California in 2020. Source: U.S. Census Bureau.

<sup>23</sup>U.S. Census Bureau, "PROFILE OF GENERAL POPULATION AND HOUSING CHARACTERISTICS," 2020. Decennial Census, DEC Demographic Profile, Table DP1, 2020, accessed on November 20, 2023, [https://data.census.gov/table/DECENNIALDP2020.DP1?g=010XX00US&d=DEC Demographic Profile](https://data.census.gov/table/DECENNIALDP2020.DP1?g=010XX00US&d=DEC%20Demographic%20Profile).

When analyzing the same Census data set across time from 2010 to 2020, the share of the Hispanic or Latino/x/e population in each Central Coast county grew, tracking with state and national trends (see Figure 12). 2010 and 2020 Census data reveal that the demographics of Central Coast residents vary across counties. However, according to the U.S. Census Bureau, the Diversity Index (DI)<sup>24</sup> of each county is less than the state DI, and all but

**“Black people are often erased. Although we are 2% of the population for Santa Barbara County, we are often erased; an afterthought.”**

Virtual Listening Session focused on the Black Community



Ventura County have a lower DI than the U.S. The Diversity Index measures the probability that two people chosen at random will be from different race and ethnicity groups. A zero percent DI indicates that everyone in the population has the same racial and ethnic characteristics. A value of 100 percent indicates that everyone in the population has different racial and ethnic characteristics. Figure 11 below highlights the DI of each county on the Central Coast. For comparison, the DI of the U.S. is 61.1 percent and the DI of California is 69.7 percent.

**Figure 11: The Diversity Index per County in 2020**

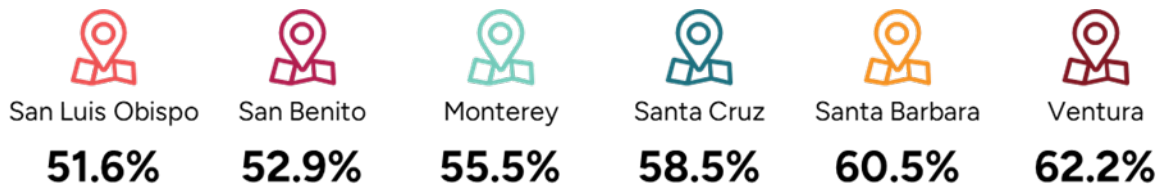
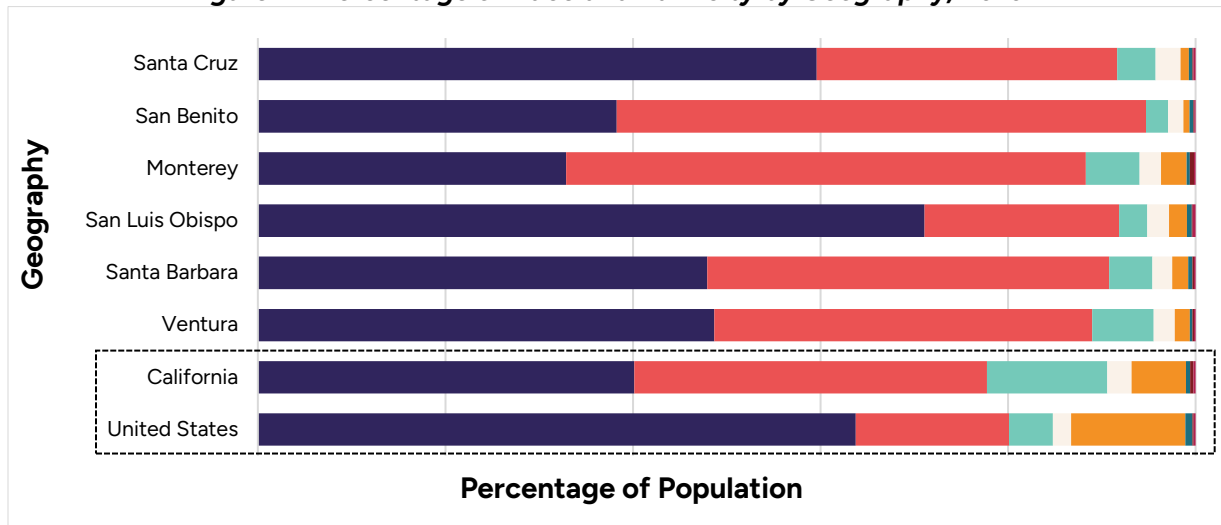


Figure 11: The Diversity Index (DI) of each county, for comparison the DI of the U.S. is 61.1 percent, and the DI of California is 69.7 percent. Source: U.S. Census Bureau.

<sup>24</sup> U.S. Census Bureau, “Racial and Ethnic Diversity in the United States: 2010 Census and 2020 Census,” Accessed December 18, 2023, <https://www.census.gov/library/visualizations/interactive/racial-and-ethnic-diversity-in-the-united-states-2010-and-2020-census.html>.

**Figure 12: Percentage of Race and Ethnicity by Geography, 2010<sup>25</sup>**



**Legend**

- White Alone (Not Hispanic or Latino)
- Hispanic or Latino
- Asian Alone (Not Hispanic or Latino)
- Black or African American Alone (Not Hispanic or Latino)
- American Indian and Alaska Native Alone (Not Hispanic or Latino)
- Native Hawaiian and Other Pacific Islander Alone (Not Hispanic or Latino)
- Two or More Races (Not Hispanic or Latino)
- Some Other Race Alone (Not Hispanic or Latino)

<sup>25</sup> U.S. Census Bureau, "RACE," 2010. Decennial Census, DEC Summary File 1, Table P8, 2010, accessed on November 20, 2023, [https://data.census.gov/table/DECENNIALSF12010.P8?q=Population Total&g=040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2010&d=DEC Summary File 1](https://data.census.gov/table/DECENNIALSF12010.P8?q=Population%20Total&g=040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2010&d=DEC%20Summary%20File%201).

		White Alone (Not Hispanic or Latino)	Hispanic or Latino	Asian Alone (Not Hispanic or Latino)	Two or More Races (Not Hispanic or Latino)	Black or African American Alone (Not Hispanic or Latino)	American Indian and Alaska Native Alone (Not Hispanic or Latino)	Native Hawaiian and Other Pacific Islander Alone (Not Hispanic or Latino)	Some Other Race Alone (Not Hispanic or Latino)
<b>Santa Cruz</b>	2010 Population	59.6%	32.0%	4.1%	2.7%	0.9%	0.4%	0.1%	0.2%
	Change from 2010 to 2020	-5.9%	2.8%	0.4%	2.2%	0.2%	-0.1%	0.0%	0.4%
<b>San Benito</b>	2010 Population	38.3%	56.4%	2.3%	1.7%	0.6%	0.4%	0.1%	0.1%
	Change from 2010 to 2020	-7.5%	4.7%	1.1%	1.2%	0.1%	-0.1%	0.1%	0.4%
<b>Monterey</b>	2010 Population	32.9%	55.4%	5.7%	2.3%	2.7%	0.3%	0.5%	0.2%
	Change from 2010 to 2020	-5.5%	5.0%	0.0%	0.9%	-0.6%	0.0%	-0.1%	0.3%
<b>San Luis Obispo</b>	2010 Population	71.1%	20.8%	3.0%	2.3%	1.9%	0.5%	0.1%	0.3%
	Change from 2010 to 2020	-6.1%	3.2%	0.5%	2.5%	-0.4%	-0.1%	0.0%	0.3%
<b>Santa Barbara</b>	2010 Population	47.9%	42.9%	4.6%	2.1%	1.7%	0.4%	0.2%	0.2%
	Change from 2010 to 2020	-6.7%	4.1%	1.1%	1.6%	-0.3%	0.0%	-0.1%	0.3%
<b>Ventura</b>	2010 Population	48.7%	40.3%	6.6%	2.3%	1.6%	0.3%	0.2%	0.2%
	Change from 2010 to 2020	-5.9%	3.0%	0.9%	1.6%	0.0%	-0.1%	0.0%	0.3%
<b>California</b>	2010 Population	40.1%	37.6%	12.8%	2.6%	5.8%	0.4%	0.3%	0.2%
	Change from 2010 to 2020	-5.4%	1.8%	2.3%	1.5%	-0.4%	0.0%	0.0%	0.4%
<b>United States</b>	2010 Population	63.7%	16.3%	4.7%	1.9%	12.2%	0.7%	0.2%	0.2%
	Change from 2010 to 2020	-5.9%	2.4%	1.2%	2.2%	-0.1%	0.0%	0.0%	0.3%

Figure 12: Percentage of race and ethnicity in each county of the Central Coast Region compared to the United States and California in 2010 and change in demographics from 2010 to 2020. Source: U.S. Census Bureau.



Uplift also conducted an analysis of the median age in each county in 2020 as compared to state and national median ages, which revealed county-specific variations (see Figure 13).

**Figure 13: Median Age by Geography<sup>26</sup>**

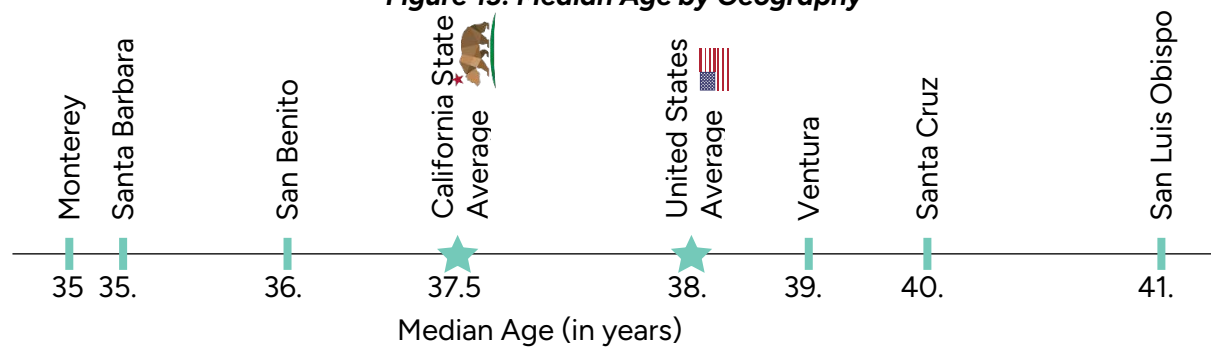


Figure 13: Median Age by Geography. Source: U.S. Census Bureau.

The analysis of the median age highlights several unique takeaways:

## +2.3 Years

Difference between median age in San Luis Obispo and national average

## 6.1 Years

Range between highest and lowest median ages on the Central Coast

## -3.8 Years

Difference between median age in Monterey and national average

Further analysis of the median age across the region from 2000 to 2020 found that the aging population in each county is in line with national and state trends over the past two decades (see Figure 14 and Figure 15). Uniquely, 21.7 percent of San Luis Obispo County’s population is over 65 years old, compared to 15.2 percent of all Californians. The increasingly older population carries economic and political implications that were prevalent throughout Uplift’s community engagement activities.

“By 2024 more than one in five adults will be caregivers. We don’t have the care needed in this community, which will most likely overburden women as they take responsibility for senior care and childcare.”

Community Convening in Ventura County

<sup>26</sup> U.S. Census Bureau, "PROFILE OF GENERAL POPULATION AND HOUSING CHARACTERISTICS," 2020. Decennial Census, DEC Demographic Profile, Table DP1, 2020, accessed on November 20, 2023, [https://data.census.gov/table/DECENNIALDP2020.DP1?g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&d=DEC Demographic Profile..](https://data.census.gov/table/DECENNIALDP2020.DP1?g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&d=DEC%20Demographic%20Profile..)

**Figure 14: Change in Median Age, 2000-2020<sup>27</sup>**

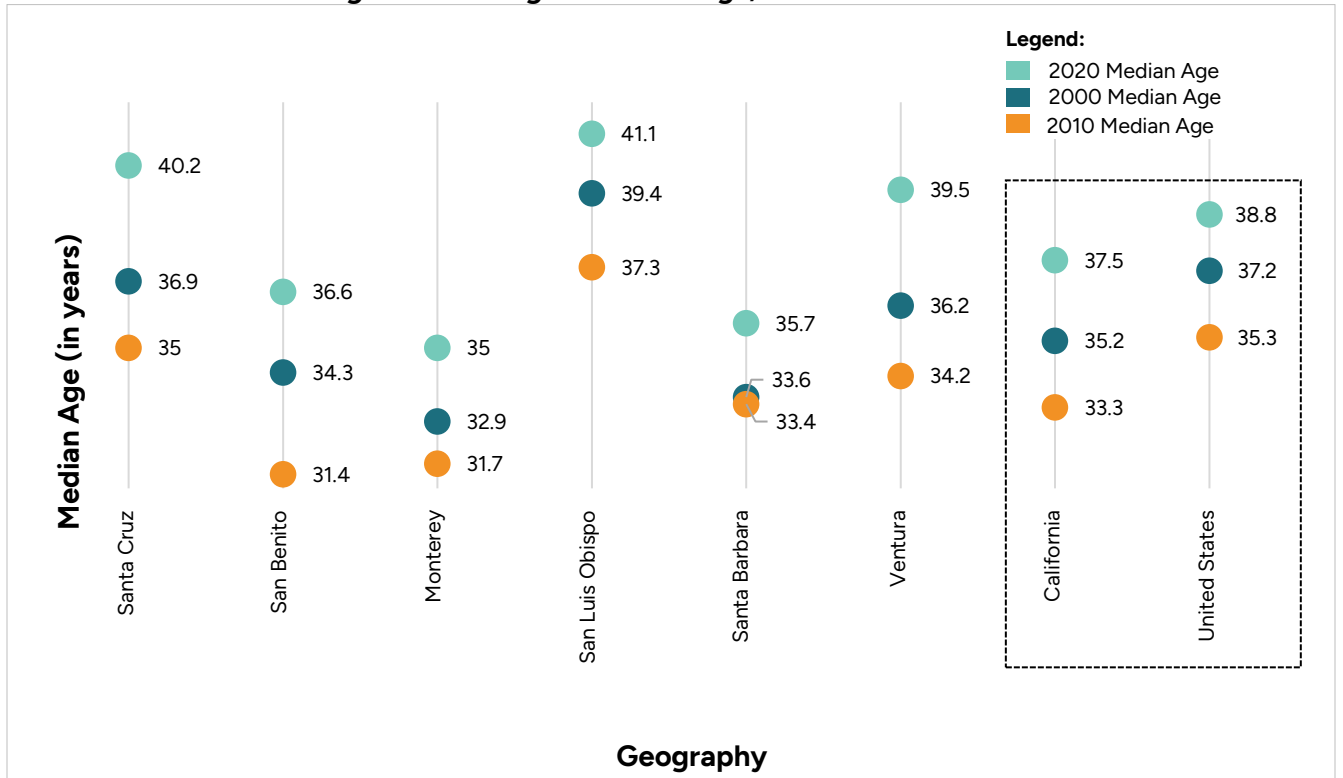
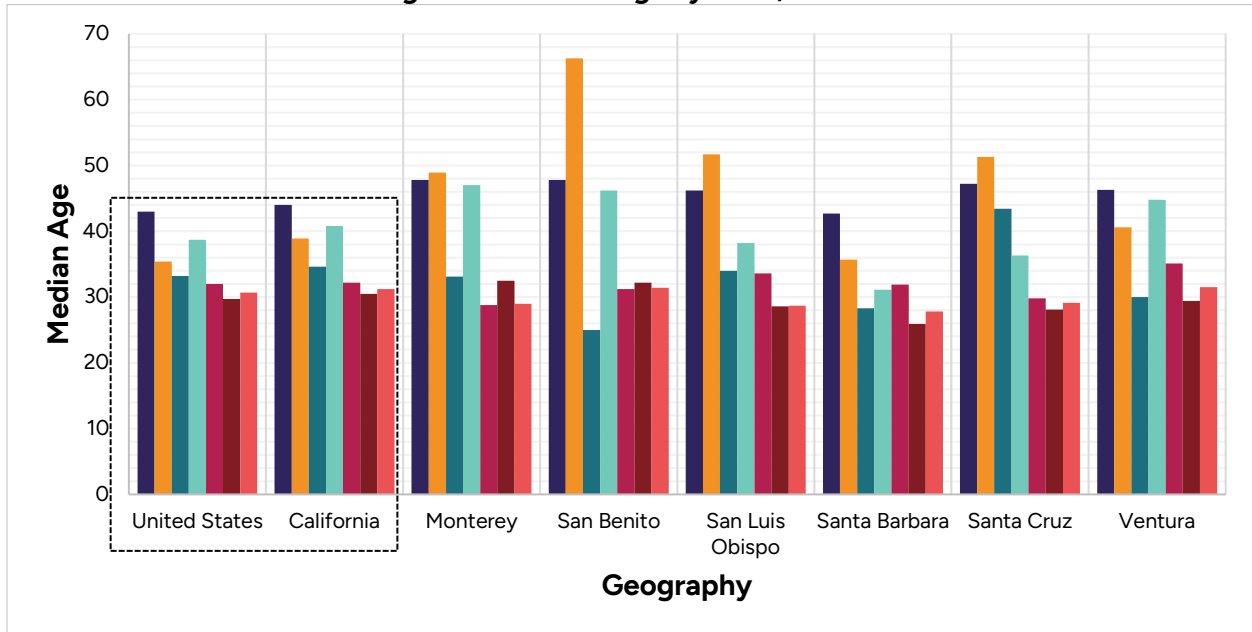


Figure 14: Change in median age (in years) in each county from 2000 to 2020 compared to the U.S. and California.  
Source: U.S. Census Bureau.

<sup>27</sup> U.S. Census Bureau, "PROFILE OF GENERAL POPULATION AND HOUSING CHARACTERISTICS," 2020. Decennial Census, DEC Demographic Profile, Table DP1, 2020, accessed on November 20, 2023, [https://data.census.gov/table/DECENNIALDP2020.DP1?g=010XX00US&d=DEC Demographic Profile](https://data.census.gov/table/DECENNIALDP2020.DP1?g=010XX00US&d=DEC%20Demographic%20Profile).  
U.S. Census Bureau, "RACE," 2010. Decennial Census, DEC Summary File 1, Table P8, 2010, accessed on November 20, 2023, [https://data.census.gov/table/DECENNIALSF12010.P8?q=Population Total&g=040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2010&d=DEC Summary File 1](https://data.census.gov/table/DECENNIALSF12010.P8?q=Population%20Total&g=040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2010&d=DEC%20Summary%20File%201).  
U.S. Census Bureau, "Profile of General Demographic Characteristics: 2000," 2000. Decennial Census, DEC State Legislative District Demographic Profile (100-Percent), Table DP1, 2000, accessed on December 20, 2023, [https://data.census.gov/table/DECENNIALDPSLDH2000.DP1?g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2000](https://data.census.gov/table/DECENNIALDPSLDH2000.DP1?g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2000).

**Figure 15: Median Age by Race, 2022<sup>28</sup>**



**Legend**

- White Alone
- Black or African American Alone
- American Indian and Alaska Native Alone
- Two or More Races
- Hispanic or Latino
- Asian Alone
- Some Other Race Alone

<sup>28</sup>U.S. Census Bureau, "Median Age by Sex (White Alone)," 2022. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B01002A, 2022, accessed on December 20, 2023, <https://data.census.gov/table/ACS1Y2022.B01002A?q=B01002A&g=050XX00US06053,06069,06079,06083,06087,06111&y=2022>.

U.S. Census Bureau, "Median Age by Sex (Black or African American Alone)," 2022. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B01002B, 2022, accessed on December 20, 2023, [https://data.census.gov/table/ACS1Y2022.B01002B?q=B01002B&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACS1Y2022.B01002B?q=B01002B&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

U.S. Census Bureau, "Median Age by Sex (American Indian and Alaska Native Alone)," 2022. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B01002C, 2022, accessed on December 20, 2023, [https://data.census.gov/table/ACS1Y2022.B01002C?q=B01002C&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACS1Y2022.B01002C?q=B01002C&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

U.S. Census Bureau, "Median Age by Sex (Some Other Race Alone)," 2022. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B01002F, 2022, accessed on December 20, 2023, [https://data.census.gov/table/ACS1Y2022.B01002F?q=B01002F&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACS1Y2022.B01002F?q=B01002F&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

U.S. Census Bureau, "Median Age by Sex (Two or More Races)," 2022. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B01002G, 2022, accessed on December 20, 2023, [https://data.census.gov/table/ACS1Y2022.B01002G?q=B01002G&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACS1Y2022.B01002G?q=B01002G&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

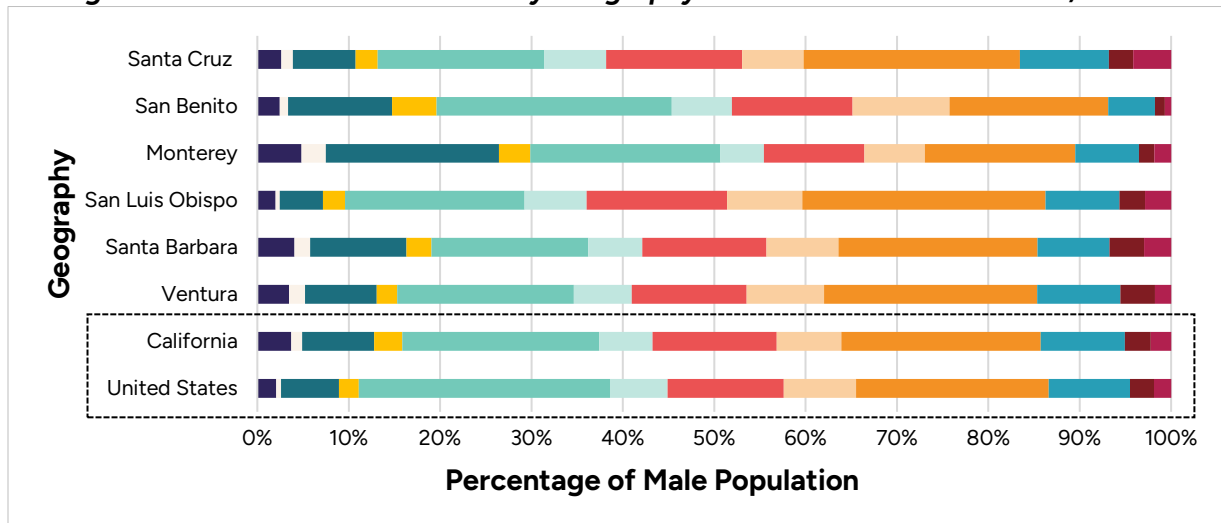
U.S. Census Bureau, "Median Age by Sex (Hispanic or Latino)," 2022. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B01002I, 2022, accessed on December 20, 2023, [https://data.census.gov/table/ACS1Y2022.B01002I?q=B01002I&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACS1Y2022.B01002I?q=B01002I&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

	United States	California	Monterey	San Benito	San Luis Obispo	Santa Barbara	Santa Cruz	Ventura
White Alone	43	44	47.8	47.8	46.2	42.7	47.2	46.3
Black or African American Alone	35.4	38.9	48.9	66.3	51.7	35.7	51.3	40.6
American Indian and Alaska Native Alone	33.2	34.6	33.1	25	34	28.3	43.4	30
Asian Alone	38.7	40.8	47	46.2	38.2	31.1	36.3	44.8
Some Other Race Alone	32	32.2	28.8	31.2	33.6	31.9	29.8	35.1
Two or More Races	29.7	30.5	32.5	32.2	28.6	25.9	28.1	29.4
Hispanic or Latino	30.7	31.2	29	31.4	28.7	27.8	29.1	31.5

Figure 15: Median Age by Race in each county, compared to the U.S. and California. Source: U.S. Census Bureau.

Educational attainment between the six counties differs slightly between each county and compared to the United States and California as well. Figure 16 shows the highest level of education that males aged 25 and over obtained, and the same data is shown for females in Figure 17.

Figure 16: Educational Attainment by Geography for Males 25 Years and Over, 2022<sup>29</sup>



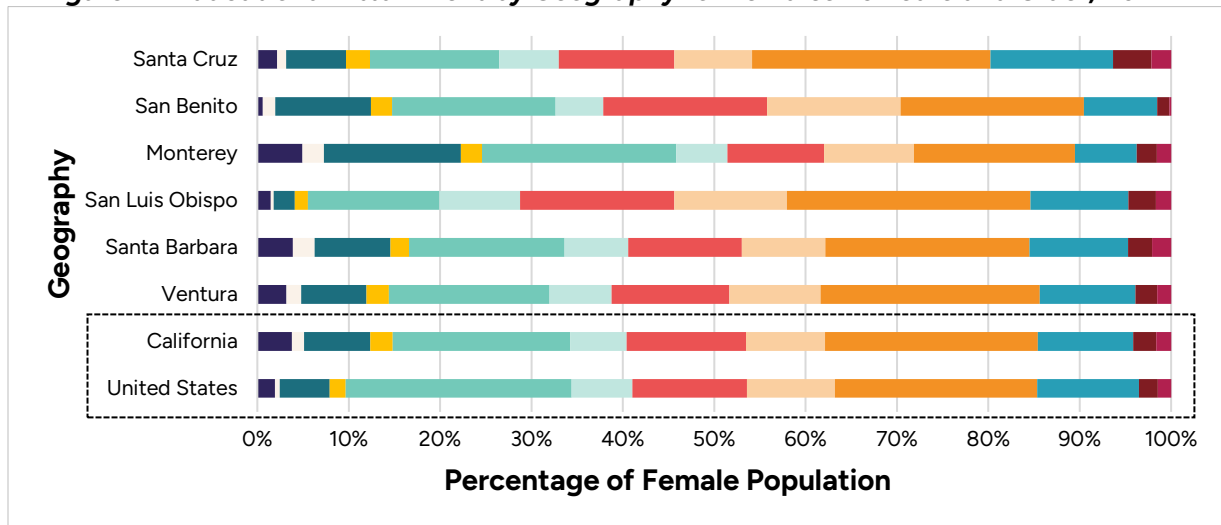
<sup>29</sup> U.S. Census Bureau, "Sex by Educational Attainment for the Population 25 Years and Over," American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B15002, 2022, Accessed December 7, 2023, [https://data.census.gov/table/ACS1Y2022.B15002?t=Educational%20Attainment&g=010XX00US\\_040XX00US6\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACS1Y2022.B15002?t=Educational%20Attainment&g=010XX00US_040XX00US6_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

	No schooling completed	Nursery to 4th grade	5th Grade to 11th Grade	12th grade, no diploma	High school graduate (includes equivalency)	Some college, less than 1 year	Some college, 1 or more years, no degree	Associate's degree	Bachelor's degree	Master's degree	Professional school degree	Doctorate degree
<b>United States</b>	2.1%	0.5%	6.4%	2.2%	27.5%	6.3%	12.7%	7.9%	21.1%	8.9%	2.6%	1.9%
<b>California</b>	3.7%	1.2%	7.9%	3.1%	21.6%	5.8%	13.6%	7.1%	21.8%	9.2%	2.8%	2.2%
<b>Ventura</b>	3.5%	1.7%	7.9%	2.3%	19.3%	6.3%	12.6%	8.5%	23.3%	9.1%	3.8%	1.8%
<b>Santa Barbara</b>	4.0%	1.7%	10.6%	2.7%	17.2%	5.9%	13.6%	7.9%	21.8%	7.9%	3.8%	3.0%
<b>San Luis Obispo</b>	2.0%	0.4%	4.7%	2.4%	19.6%	6.8%	15.4%	8.2%	26.6%	8.1%	2.8%	2.8%
<b>Monterey</b>	4.8%	2.7%	18.9%	3.4%	20.8%	4.8%	11.0%	6.6%	16.5%	7.0%	1.7%	1.8%
<b>San Benito</b>	2.4%	0.9%	11.4%	4.9%	25.7%	6.6%	13.2%	10.6%	17.4%	5.1%	1.1%	0.7%
<b>Santa Cruz</b>	2.6%	1.3%	6.8%	2.4%	18.2%	6.8%	14.9%	6.7%	23.7%	9.7%	2.7%	4.1%

Figure 16: Educational Attainment for the male population 25 years and older of each county compared to the U.S. and California. Source: U.S. Census Bureau.

In Ventura, Santa Barbara, San Luis Obispo, and Santa Cruz counties, approximately a quarter of males aged 25 and above hold a bachelor's degree—aligning with California's education trends and surpassing the U.S. average. However, in San Benito and Monterey counties, the highest educational attainment for the majority of males in this age group is a high school diploma (25.7 percent in San Benito and 20.8 percent in Monterey), echoing the trend in the U.S.

**Figure 17: Educational Attainment by Geography for Females 25 Years and Older, 2022<sup>30</sup>**



**Legend**

- No Schooling
- 5<sup>th</sup> Grade to 11<sup>th</sup> Grade
- 12<sup>th</sup> Grade, No Diploma
- High School Graduate (Includes Equivalency)
- Some College, Less than 1 Year, No Degree
- Some College, 1 or More Years, No Degree
- Associate's Degree
- Bachelor's Degree
- Graduate or Professional Degree

	No schooling completed	Nursery to 4th grade	5th Grade to 11th Grade	12th grade, no diploma	High school graduate (includes)	Some college, less than 1 year	Some college, 1 or more years, no degree	Associate's degree	Bachelor's degree	Master's degree	Professional school degree	Doctorate degree
<b>United States</b>	1.9%	0.5%	5.5%	1.7%	24.7%	6.7%	12.5%	9.6%	22.1%	11.1%	2.0%	1.5%
<b>California</b>	3.8%	1.3%	7.3%	2.4%	19.5%	6.1%	13.1%	8.7%	23.3%	10.5%	2.5%	1.6%
<b>Ventura</b>	3.2%	1.6%	7.1%	2.5%	17.6%	6.8%	12.9%	10.0%	24.0%	10.5%	2.4%	1.5%
<b>Santa Barbara</b>	3.9%	2.4%	8.3%	2.0%	17.0%	7.0%	12.4%	9.2%	22.3%	10.8%	2.6%	2.1%
<b>San Luis Obispo</b>	1.5%	0.3%	2.3%	1.4%	14.4%	8.8%	16.9%	12.3%	26.7%	10.7%	3.0%	1.7%
<b>Monterey</b>	4.9%	2.4%	15.0%	2.3%	21.2%	5.6%	10.6%	9.9%	17.6%	6.8%	2.2%	1.6%
<b>San Benito</b>	0.6%	1.4%	10.5%	2.3%	17.9%	5.2%	18.0%	14.6%	20.1%	8.0%	1.3%	0.2%
<b>Santa Cruz</b>	2.2%	1.0%	6.5%	2.6%	14.1%	6.5%	12.6%	8.5%	26.1%	13.4%	4.2%	2.2%

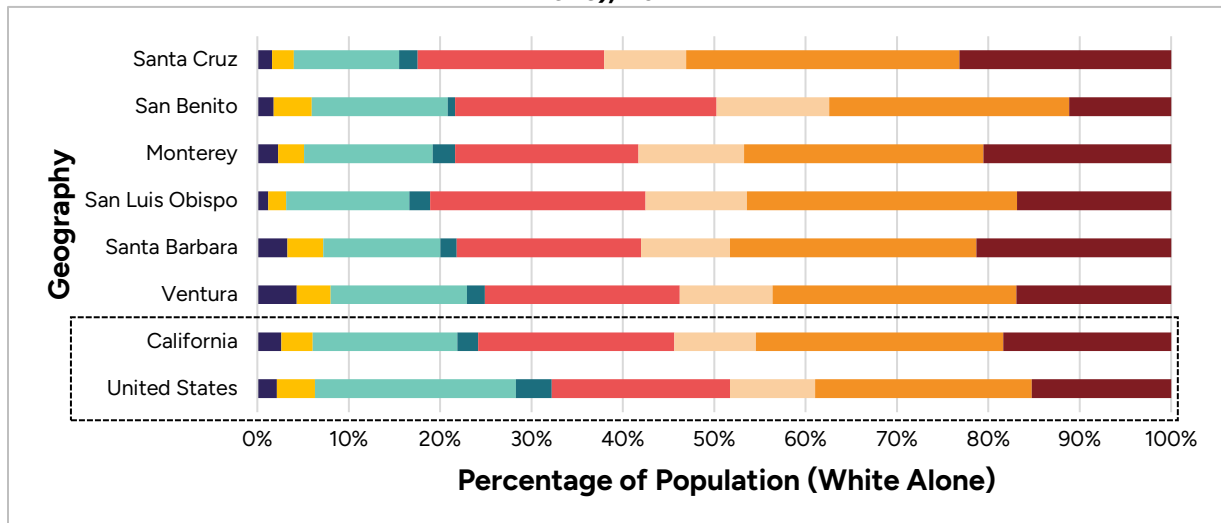
Figure 17: Educational Attainment for the female population 25 years and older of each county compared to the U.S. and California. Source: U.S. Census Bureau.

The majority of females aged 25 and above in Ventura (24.0 percent), Santa Barbara (22.3 percent), San Luis Obispo (26.7 percent), San Benito (20.1 percent), and Santa Cruz (26.1 percent) counties have received a bachelor's degree. This aligns with the educational

<sup>30</sup>U.S. Census Bureau, "Sex by Educational Attainment for the Population 25 Years and Over," American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B15002, 2022, Accessed: December 7, 2023, [https://data.census.gov/table/ACS1Y2022.B15002?t=Educational%20Attainment&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACS1Y2022.B15002?t=Educational%20Attainment&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

attainment of the majority of females in California (23.2 percent) and surpasses the U.S. average. However, in Monterey County, most females in this age group's highest level of education is a high school diploma (21.2 percent), matching the U.S. average for females aged 25 and above. The following figures show educational attainment in relation to race across the Central Coast counties compared to the U.S. and California. Note, that the U.S. Census Bureau does not have statistics on each of the levels of educational attainment for all of the six counties.

**Figure 18: Educational Attainment by Geography for the Population 25 Years and Over (White Alone), 2022<sup>31</sup>**



	Santa Cruz	San Benito	Monterey	San Luis Obispo	Santa Barbara	Ventura	California	United States
Less than 9th grade	1.6%	1.8%	2.3%	1.2%	3.3%	4.3%	2.6%	2.1%
9th to 12th grade, no diploma	2.4%	4.2%	2.8%	2.0%	3.9%	3.7%	3.4%	4.2%
Regular high school diploma	11.5%	14.9%	14.1%	13.5%	12.8%	14.9%	15.8%	22.0%
GED or alternative credential	2.0%	0.8%	2.4%	2.3%	1.8%	1.9%	2.3%	3.9%
Some college, no degree	20.4%	28.6%	20.1%	23.6%	20.2%	21.3%	21.5%	19.5%
Associate's degree	9.0%	12.4%	11.6%	11.1%	9.7%	10.2%	9.0%	9.3%
Bachelor's degree	29.9%	26.3%	26.2%	29.6%	27.0%	26.7%	27.0%	23.7%
Graduate or professional degree	23.2%	11.1%	20.5%	16.9%	21.3%	16.9%	18.4%	15.2%

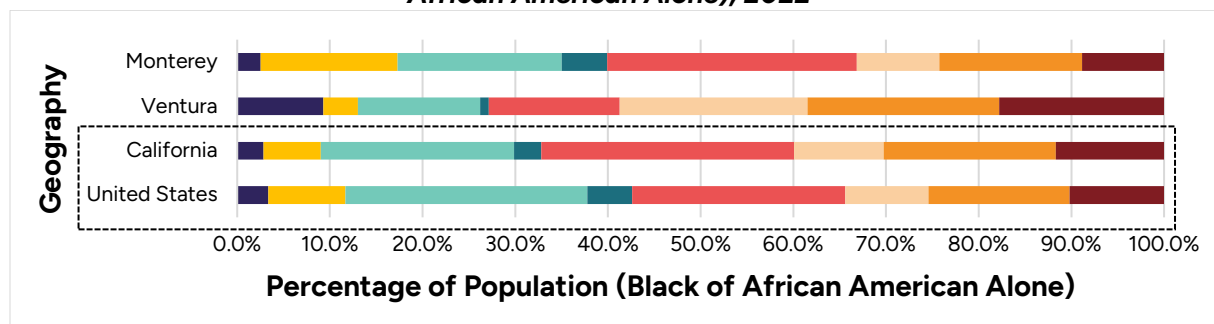
Figure 18: Educational attainment of each county compared to the U.S. and California for the population that is White Alone. Source: U.S. Census Bureau.

<sup>31</sup>U.S. Census Bureau, "Sex by Educational Attainment for the Population 25 Years and Over (White Alone)," American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B15002, 2022, Accessed on December 9, 2023, [https://data.census.gov/table/ACS1Y2022.B15002A?t=Educational%20Attainment&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACS1Y2022.B15002A?t=Educational%20Attainment&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).



Most individuals who identify as White Alone hold a bachelor’s degree as their highest level of education, as shown above in Figure 18. This mirrors education trends seen among the white population in both the U.S. and California. San Benito is the exception, with most of the white population’s highest of level of education being some college with no degree.

**Figure 19: Educational Attainment by Geography for the Population 25 Years and Over (Black or African American Alone), 2022<sup>32</sup>**



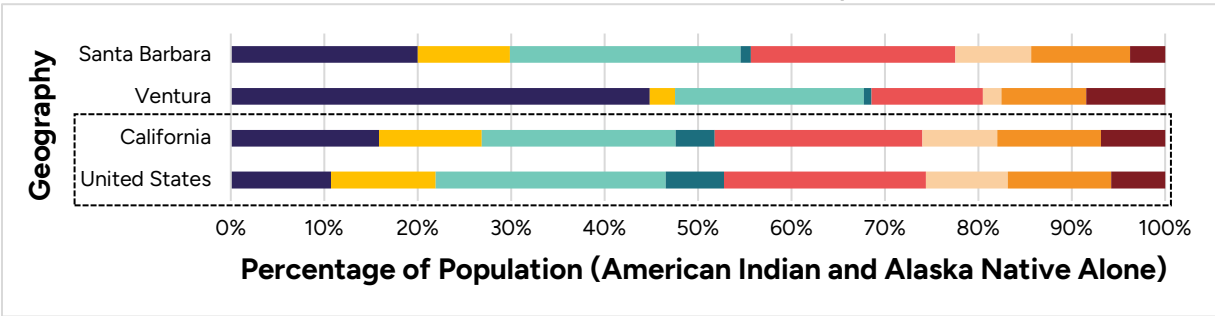
	Santa Cruz	San Benito	Monterey	San Luis Obispo	Santa Barbara	Ventura	California	United States
Less than 9th grade	Data not available	Data not available	2.5%	Data not available	Data not available	9.3%	2.9%	3.4%
9th to 12th grade, no diploma			14.8%			3.7%	6.2%	8.3%
Regular high school diploma			17.7%			13.2%	20.9%	26.1%
GED or alternative credential			4.9%			0.9%	2.9%	4.8%
Some college, no degree			27.0%			14.1%	27.3%	23.0%
Associate's degree			8.9%			20.3%	9.7%	9.0%
Bachelor's degree			15.4%			20.7%	18.6%	15.2%
Graduate or professional degree	8.8%	17.8%	11.7%	10.2%				

Figure 19: Educational attainment of each county compared to the U.S. and California for the population that is Black or African American Alone. Source: U.S. Census Bureau.

On the Central Coast, the U.S. Census Bureau provided educational data solely for Monterey and Ventura counties regarding the Black or African American population. As shown in Figure 19, in Ventura County, a majority (20.7 percent) of this demographic holds a bachelor’s degree, surpassing U.S. and California averages. However, in Monterey County, the predominant educational attainment among the Black or African American population is some college education without obtaining a degree (27.0 percent). Additionally, the second largest portion of the Black or African American population in Monterey received a high school diploma as their highest level of education (17.7 percent).

<sup>32</sup> U.S. Census Bureau, "Sex by Educational Attainment for the Population 25 Years and Over (Black or African American Alone)," American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B15002B, 2022, Accessed on December 12, 2023, [https://data.census.gov/table/ACSDT1Y2022.B15002B?t=EducationalAttainment&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACSDT1Y2022.B15002B?t=EducationalAttainment&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

**Figure 20: Educational Attainment by Geography for the Population 25 Years and Over (American Indian and Alaska Native Alone), 2022<sup>33</sup>**



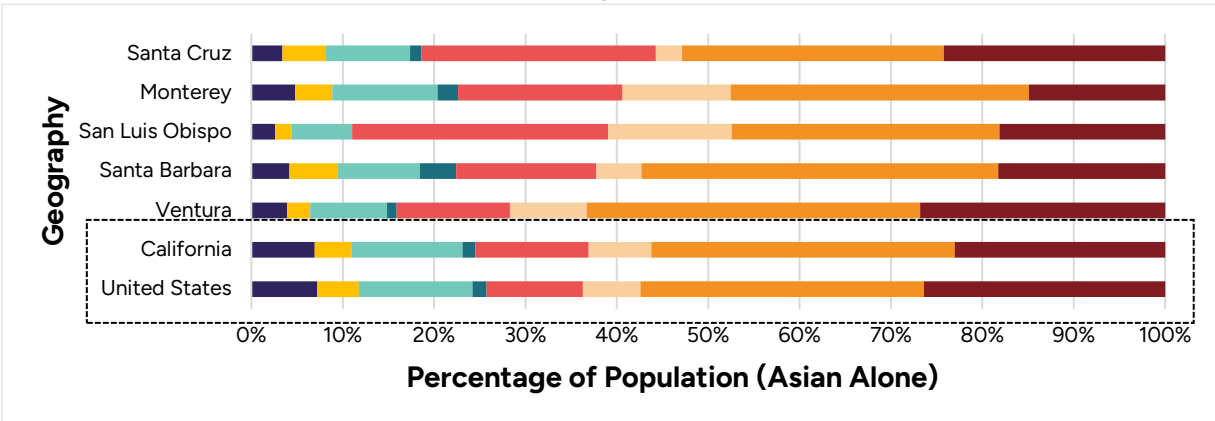
	Santa Cruz	San Benito	Monterey	San Luis Obispo	Santa Barbara	Ventura	California	United States
Less than 9th grade	Data not available	Data not available	Data not available	Data not available	20.0%	44.8%	15.9%	10.7%
9th to 12th grade, no diploma					9.9%	2.7%	11.0%	11.2%
Regular high school diploma					24.7%	20.2%	20.8%	24.6%
GED or alternative credential					1.1%	0.8%	4.2%	6.2%
Some college, no degree					21.9%	11.9%	22.2%	21.6%
Associate's degree					8.1%	2.0%	8.0%	8.8%
Bachelor's degree					10.6%	9.1%	11.1%	11.1%
Graduate or professional degree					3.8%	8.4%	6.9%	5.8%

Figure 20: Educational attainment of each county compared to the U.S. and California for the population that is American Indian and Alaska Native Alone. Source: U.S. Census Bureau.

Data from the U.S. Census Bureau on educational attainment among the American Indian and Alaska Native population is only available for Santa Barbara and Ventura counties. As shown in Figure 20 in Ventura County, 44.8 percent of this demographic's highest educational level is less than 9<sup>th</sup> grade, while 20.9 percent hold a high school diploma. In Santa Barbara County, the majority (24.7 percent) have a high school diploma as their highest level of education, followed by 21.9 percent with some college education, but no degree.

<sup>33</sup> U.S. Census Bureau, "Sex by Educational Attainment for the Population 25 Years and Over (American Indian and Alaska Native Alone)," American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B15002C, 2022, Accessed on December 9, 2023. [https://data.census.gov/table/ACS1Y2022.B15002C?t=Educational Attainment&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACS1Y2022.B15002C?t=Educational+Attainment&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

**Figure 21: Educational Attainment by Geography for the Population 25 Years and Over (Asian Alone), 2022<sup>34</sup>**



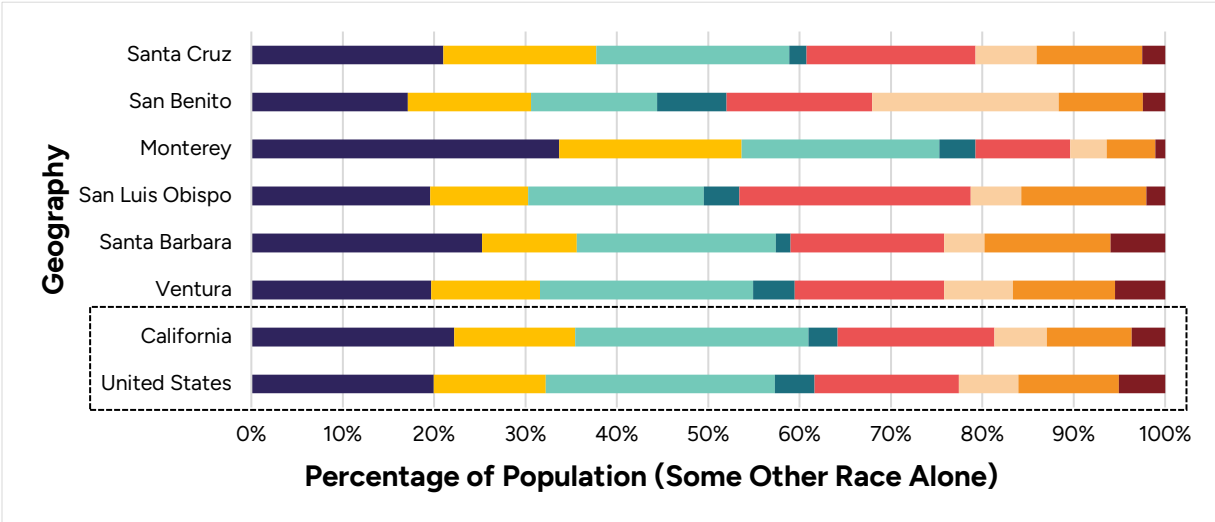
	Santa Cruz	San Benito	Monterey	San Luis Obispo	Santa Barbara	Ventura	California	United States
Less than 9th grade	3.4%	Data not available	4.8%	2.6%	4.2%	3.9%	6.9%	7.2%
9th to 12th grade, no diploma	4.8%		4.0%	1.8%	5.3%	2.5%	4.1%	4.6%
Regular high school diploma	9.2%		11.5%	6.7%	9.0%	8.4%	12.1%	12.4%
GED or alternative credential	1.3%		2.3%	0.0%	4.0%	1.0%	1.4%	1.5%
Some college, no degree	25.7%		18.0%	28.0%	15.3%	12.4%	12.4%	10.5%
Associate's degree	2.9%		11.8%	13.5%	4.9%	8.4%	6.9%	6.3%
Bachelor's degree	28.7%		32.6%	29.3%	39.0%	36.5%	33.2%	31.0%
Graduate or professional degree	24.2%		14.9%	18.1%	18.3%	26.8%	23.0%	26.4%

Figure 21: Educational attainment of each county compared to the U.S. and California for the population that is Asian Alone. Source: U.S. Census Bureau.

As shown in Figure 21, across all counties on the Central Coast the highest level of education for most of the Asian Alone population is a bachelor's degree. This aligns with U.S. and state averages. The U.S. Census Bureau does not provide information for San Benito County.

<sup>34</sup> U.S. Census Bureau, "Sex by Educational Attainment for the Population 25 Years and Over (Asian Alone)," American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B15002D, 2022, Accessed on December 12, 2023, [https://data.census.gov/table/ACSDT1Y2022.B15002D?t=Educational%20Attainment&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACSDT1Y2022.B15002D?t=Educational%20Attainment&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

**Figure 22: Educational Attainment by Geography for the Population 25 Years and Over (Some Other Race Alone), 2022<sup>35</sup>**



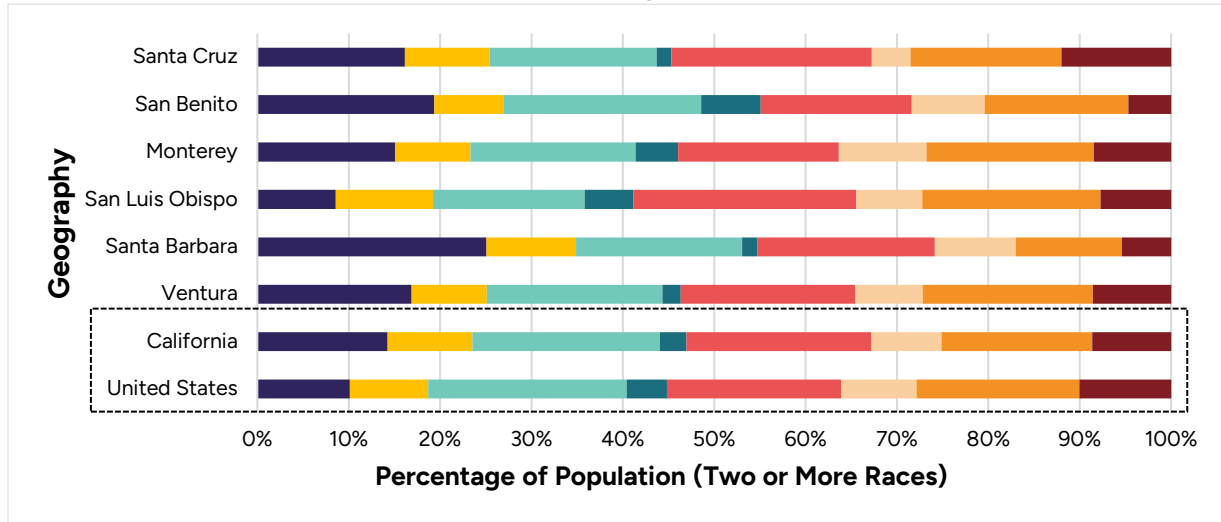
	Santa Cruz	San Benito	Monterey	San Luis Obispo	Santa Barbara	Ventura	California	United States
Less than 9th grade	21.0%	17.1%	33.7%	19.6%	25.3%	19.7%	22.2%	20.0%
9th to 12th grade, no diploma	16.7%	13.5%	20.0%	10.7%	10.3%	11.9%	13.3%	12.3%
Regular high school diploma	21.1%	13.8%	21.6%	19.2%	21.8%	23.3%	25.5%	25.1%
GED or alternative credential	1.9%	7.6%	4.0%	3.9%	1.6%	4.6%	3.2%	4.3%
Some college, no degree	18.5%	16.0%	10.4%	25.3%	16.8%	16.4%	17.2%	15.8%
Associate's degree	6.7%	20.4%	4.0%	5.5%	4.4%	7.5%	5.8%	6.5%
Bachelor's degree	11.6%	9.2%	5.3%	13.7%	13.8%	11.2%	9.3%	11.0%
Graduate or professional degree	2.5%	2.4%	1.1%	2.1%	6.0%	5.5%	3.7%	5.1%

Figure 22: Educational attainment of each county compared to the United States and California for the population that is Some Other Race Alone. Source: U.S. Census Bureau.

As shown in Figure 22, for most of the population that is Other Race Alone, the highest level of education in Ventura and Santa Cruz is a high school diploma, which mirrors the U.S. and California trends. In Monterey and Santa Barbara, most of this demographic's highest level of education is less than 9<sup>th</sup> grade, in San Luis Obispo it is some college with no degree, and in San Benito it is an associate's degree.

<sup>35</sup> U.S. Census Bureau, "Sex by Educational Attainment for the Population 25 Years and Over (Some Other Race Alone)," American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B15002F, 2022, Accessed on December 12, 2023. [https://data.census.gov/table/ACS1Y2022.B15002F?t=Educational Attainment&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACS1Y2022.B15002F?t=Educational+Attainment&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

**Figure 23: Educational Attainment by Geography for the Population 25 Years and Over (Two or More Races), 2022<sup>36</sup>**



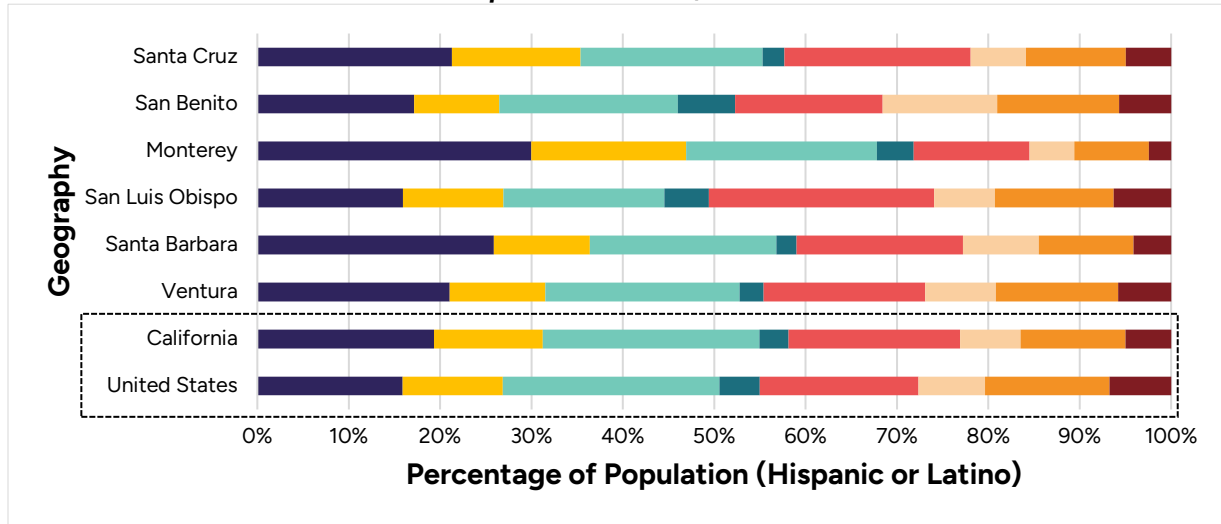
	Santa Cruz	San Benito	Monterey	San Luis Obispo	Santa Barbara	Ventura	California	United States
Less than 9th grade	16.1%	19.4%	15.1%	8.6%	25.1%	16.9%	14.3%	10.1%
9th to 12th grade, no diploma	9.3%	7.6%	8.2%	10.6%	9.8%	8.2%	9.3%	8.6%
Regular high school diploma	18.3%	21.6%	18.1%	16.6%	18.2%	19.2%	20.5%	21.7%
GED or alternative credential	1.6%	6.5%	4.6%	5.3%	1.7%	2.0%	2.9%	4.4%
Some college, no degree	21.9%	16.5%	17.6%	24.4%	19.4%	19.1%	20.2%	19.1%
Associate's degree	4.2%	8.0%	9.6%	7.2%	8.9%	7.4%	7.7%	8.3%
Bachelor's degree	16.5%	15.7%	18.3%	19.5%	11.6%	18.7%	16.5%	17.8%
Graduate or professional degree	12.0%	4.7%	8.5%	7.7%	5.4%	8.5%	8.6%	10.0%

Figure 23: Educational attainment of each county compared to the United States and California for the population that is two or more races. Source: U.S. Census Bureau.

As shown in Figure 23, most of the population that is two or more races in Ventura and San Benito have a high school degree as the highest level of education, consistent with trends observed in the U.S. and California. In Santa Barbara, 25.1 percent of this population's highest education level is less than 9<sup>th</sup> grade, while in San Luis Obispo, it is 24.4 percent. In Santa Cruz, 21.9 percent have attained some college without obtaining a degree, whereas in Monterey, 18.3 percent have achieved a bachelor's degree.

<sup>36</sup> U.S. Census Bureau, "Sex by Educational Attainment for the Population 25 Years and Over (Two or More Races)," American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B15002G, 2022, Accessed on December 12, 2023. [https://data.census.gov/table/ACSDT1Y2022.B15002G?t=Educational Attainment&g=010XX00US\\_040XX00US06\\_050XX00US06053,06069,06079,06083,06087,06111&y=2022](https://data.census.gov/table/ACSDT1Y2022.B15002G?t=Educational+Attainment&g=010XX00US_040XX00US06_050XX00US06053,06069,06079,06083,06087,06111&y=2022).

**Figure 24: Educational Attainment by Geography for the Population 25 Years and Over (Hispanic or Latino), 2022<sup>37</sup>**



	Santa Cruz	San Benito	Monterey	San Luis Obispo	Santa Barbara	Ventura	California	United States
Less than 9th grade	21.3%	17.2%	30.0%	15.9%	25.9%	21.1%	19.3%	15.9%
9th to 12th grade, no diploma	14.1%	9.3%	17.0%	11.0%	10.5%	10.4%	11.9%	11.0%
Regular high school diploma	19.9%	19.5%	20.9%	17.6%	20.4%	21.3%	23.7%	23.7%
GED or alternative credential	2.4%	6.3%	4.0%	4.8%	2.2%	2.6%	3.2%	4.4%
Some college, no degree	20.4%	16.1%	12.7%	24.7%	18.2%	17.7%	18.7%	17.3%
Associate's degree	6.0%	12.5%	4.9%	6.6%	8.3%	7.7%	6.6%	7.3%
Bachelor's degree	10.9%	13.4%	8.2%	13.0%	10.4%	13.4%	11.5%	13.6%
Graduate or professional degree	5.0%	5.7%	2.4%	6.3%	4.1%	5.8%	5.0%	6.8%

Figure 24: Educational attainment of each county compared to the United States and California for the population that is of Hispanic or Latino ethnicity. Source: U.S. Census Bureau.

In Ventura and San Benito, for most of the population that is Hispanic or Latino, the highest level of education is a high school diploma, which reflects similar trends to that in the U.S. and California. In San Luis Obispo for most of the population that is Hispanic or Latino, the highest level of education is some college, with no degree. In Santa Barbara, Monterey, and Santa Cruz, the majority of the population's highest level of education is less than 9<sup>th</sup> grade as shown in Figure 24.

Educational Attainment varies greatly between each race and county, underscoring the prevailing inequalities across different demographics. These inequalities are further highlighted by the percentage of the population that is white whose highest level of education is a bachelor's degree compared to the population that is Hispanic or Latino/x/e whose highest level of education is less than 9<sup>th</sup> grade.

Additionally, information is not available for every county in the region and the U.S. Census Bureau does not collect information on educational attainment based on ethnicity alone but

<sup>37</sup> U.S. Census Bureau, "Sex by Educational Attainment for the Population 25 Years and Over (Hispanic or Latino)," American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B15002I, 2022, Accessed on December 12, 2023. [https://data.census.gov/table/ACS1Y2022.B15002I?q=B15002I: Sex by Educational Attainment for the Population 25 Years and Over \(Hispanic or Latino\)&g=050XX00US06053,06069,06079,06083,06087,06111](https://data.census.gov/table/ACS1Y2022.B15002I?q=B15002I: Sex by Educational Attainment for the Population 25 Years and Over (Hispanic or Latino)&g=050XX00US06053,06069,06079,06083,06087,06111).

rather just on race with a separate category for Hispanic or Latino. Figure 25 and Figure 26 below highlight the majority of each population’s highest level of education per county.

**Figure 25: Summary of the Average Highest Level of Educational Attainment by Race and County – Northern Sub-Region**



## Santa Cruz

**White Alone:** Bachelor’s Degree

**Black or African American Alone:** Information not available

**American Indian and Alaska Native Alone:** Information Not Available

**Asian Alone:** Bachelor’s Degree

**Some Other Race Alone:** Regular high school diploma

**Two or More Races:** Some college, no degree

**Hispanic or Latino:** Less than 9th grade



## San Benito

**White Alone:** Some college, no degree

**Black or African American Alone:** Information not available

**American Indian and Alaska Native Alone:** Information not available

**Asian Alone:** Information not available

**Some Other Race Alone:** Associate’s Degree

**Two or More Races:** Regular high school diploma

**Hispanic or Latino:** Regular high school diploma



## Monterey

**White Alone:** Bachelor’s Degree

**Black or African American Alone:** Some college, no degree

**American Indian and Alaska Native Alone:** Information not available

**Asian Alone:** Bachelor’s Degree

**Some Other Race Alone:** Less than 9th grade

**Two or More Races:** Bachelor’s Degree

**Hispanic or Latino:** Less than 9th grade



Figure 25: Source U.S. Census Bureau.



**Figure 26: Summary of the Average Highest Level of Educational Attainment by Race and County – Southern Sub-Region**



## San Luis Obispo

**White Alone:** Bachelor’s Degree  
**Black or African American Alone:** Information not available  
**American Indian and Alaska Native Alone:** Information not available  
**Asian Alone:** Bachelor’s Degree  
**Some Other Race Alone:** Some college, no degree  
**Two or More Races:** Some college, no degree  
**Hispanic or Latino:** Some college, no degree



## Santa Barbara

**White Alone:** Bachelor’s Degree  
**Black or African American Alone:** Information not available  
**American Indian and Alaska Native Alone:** Regular high school diploma  
**Asian Alone:** Bachelor’s Degree  
**Some Other Race Alone:** Less than 9th grade  
**Two or More Races:** Less than 9th grade  
**Hispanic or Latino:** Less than 9th grade



## Ventura

**White Alone:** Bachelor’s Degree  
**Black or African American Alone:** Bachelor’s Degree  
**American Indian and Alaska Native Alone:** Less than 9th grade  
**Asian Alone:** Bachelor’s Degree  
**Some Other Race Alone:** Regular high school diploma  
**Two or More Races:** Regular high school diploma  
**Hispanic or Latino:** Regular high school diploma



Figure 26: Source U.S. Census Bureau.

— Areas for Further Exploration —

- Declining birth rates
- Shares of residents with disabilities

## 2. Community engagement highlights serious concerns about quality of life and barriers to economic mobility in the Central Coast Region.

Deep engagement with over 1,600 community members via Community Convenings and Listening Sessions, and an additional 1,200 residents through a public opinion poll suggests that lived experience is consistent with empirical analysis of significant barriers to equitable economic development. Findings are detailed below.

**2A. Given the lack of quality jobs and high cost of living, especially the high cost of housing, Central Coast residents often do not see a future for themselves and their**

**families in the region.** These sentiments apply to residents ranging from college students to older adults who have been living in the region for decades. Doubts about futures in the Central Coast are also shared across residents of different races and ethnicities. The prevalence of lower-paying jobs inhibits even some of the most credentialed members of the community from making ends meet. Considering how commonplace it is for residents to live paycheck-to-paycheck in the region, it is no surprise that one-third of local households surveyed lacked the funds to pay for a \$500 emergency<sup>38</sup>. In addition to insufficient wages, jobs – most notably within the agriculture industry – also often have low flexibility (no

**“Regardless of the type of work that is done, the salary is not enough to pay the rent, which is very expensive. For 40 hours, we are paid \$560, and the rent is \$3,500 or \$3,600, so there are up to three families living in one house and that is a problem. The salary does not match the high costs.”**

Listening Session in Monterey with Spanish-speaking parents of children with disabilities



**“My generation is retired but I am concerned about the students I serve and their futures.”**

Listening Session in Santa Cruz



sick/vacation leave), no healthcare coverage, and no retirement programs. This takes a toll beyond residents’ financials: without these benefits, residents’ health and family well-being are compromised. While many people have a hard time finding jobs in the region, older adults face more difficulty finding jobs that they can do based on their skillsets and health constraints. Additionally, job seasonality and the gig economy contribute to insufficient hours and pay instability. To cope, two-thirds of households surveyed agreed

<sup>38</sup> Uplift Central Coast Public Opinion Poll Report. November 30, 2023.

the standard of living among working and middle-class families is declining.<sup>39</sup> For example, some people are sharing homes with multiple families because they cannot otherwise afford rent. As one college student put it, “The housing crisis doesn't seem to be solved. They don't care to fix it.”<sup>40</sup> Feeling left behind and undervalued may also drive people out of the region. There are, however, bright spots. Many residents reported a powerful desire to stay in their communities and that they would see a future for them and their family in the Central Coast if the cost of housing decreases.

### **Housing affordability is an existential impediment to equitable economic development.**

Housing scarcity and affordability is an existential issue for the Central Coast, impacting resident livelihoods, industry competitiveness, and the region's future.<sup>41</sup> Numbers of new housing units vastly fall short of needs (see Figure 27).

Solutions must address multi-faceted issues, such as “not in my back yard” philosophies (NIMBYism), inadequate state housing funding, and local land-use policies and inputs such as wastewater infrastructure. A barrier raised by stakeholders is the substantial decline in subsidized funding for local nonprofit housing developers and housing authorities as a result of the dismantling of the state Redevelopment Agency in 2012.

Some momentum is already underway in the region; however, these efforts will need to be expanded and bolstered.

In 2015, the City of San Luis Obispo updated its land use policy to try to speed housing development, including streamlining development agreements and permitting, and enabling a pilot program around infill for small units downtown. The County of Santa Barbara is taking steps to make county land available for workforce housing development. Employer willingness to explore subsidized workforce housing models in Santa Barbara County also provides a basis for potential strategic responses.

Ultimately, the housing crisis is a complex issue with multiple contributing factors and sometimes conflicting solutions. Additional consideration of this topic is critical to fostering a more equitable economy.

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<sup>39</sup> Uplift Central Coast Public Opinion Poll Report. November 30, 2023.

<sup>40</sup> Listening Session, University of California Santa Cruz, December 2, 2023.

<sup>41</sup> Insufficient housing supply has been shown to negatively impact economic development. See, for instance, Chang-Tai Hsieh & Enrico Moretti, 2019, “Housing constraints and Spatial Allocation,” American Economic Journal: Macroeconomics, vol 11(2), pages 1-39, available at: <https://www.nber.org/papers/w21154>.

**Figure 27: New Privately Owned Housing Units Authorized by County**

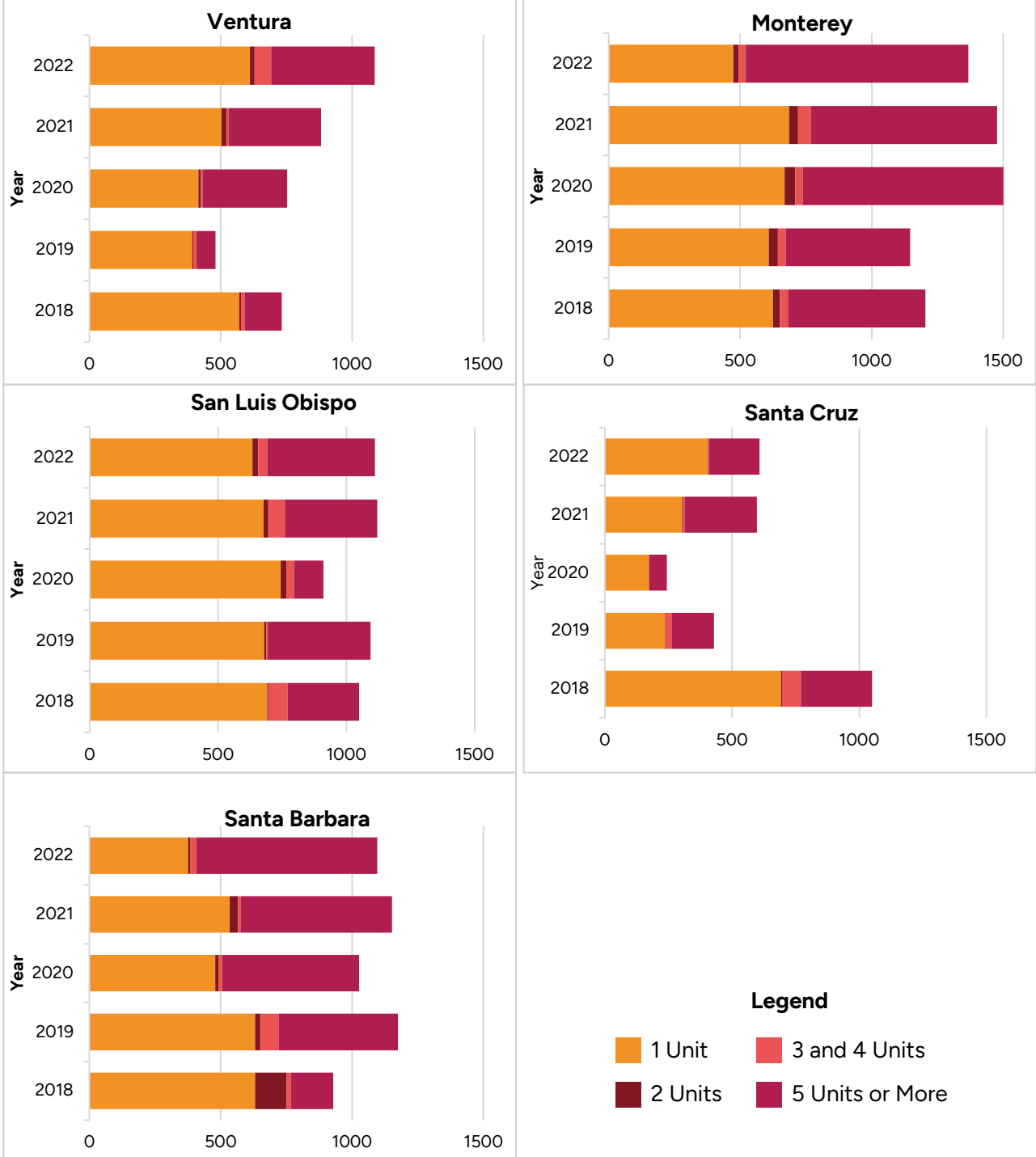


Figure 27: New privately-owned housing units authorized in metropolitan statistical area by county, 2018-2022. Source: U.S. Census Bureau Index of Economic Activity, 2022.

**2B. The region’s underdeveloped infrastructure poses challenges for Central Coast residents.** Lack of broadband perpetuates digital inequity, leaving some without access to the internet and the job information it has to offer, and preventing people from working virtually. A freelance style consultant, for instance, shared about the difficulties of doing business without internet access, unable to research clients and instead, needs to travel significant distances to be productive.<sup>42</sup>

Transportation insecurity was a concern frequently highlighted by Central Coast residents. Without public transit as a viable option, residents resort to driving, leading to increased traffic and long, expensive, and high-emitting daily commutes. One person described this day-after-day, back-and-forth commuting like a hamster running on a wheel.<sup>43</sup> There is also a sub-section of the region with residents, primarily women, who do not have drivers licenses, so they are unable to drive themselves outside of their neighborhoods for work and rely on carpooling.<sup>44</sup> This poses gender inequity and further strains their ability to demonstrate their reliability in the workplace. In addition to getting to work, residents shared that even their nearest grocery stores are far away, leaving them with access to only fast food.<sup>45</sup> Given the region’s strong agricultural presence, across multiple Listening Sessions, residents expressed interest in additional opportunities to buy produce directly from farmers and support community gardens to expand their access to fresher, healthier food.

**“I work at the only restaurant in New Cuyama. I need to take turns with my sister-in-law to go to work because we don’t have childcare for our kids.”**

Listening Session in New Cuyama



**2C. The region’s under resourced care economy is a barrier to quality of life on the Central Coast, but may also present quality job opportunities.** Limited availability of affordable eldercare and childcare providers, especially for infants, makes it difficult for prime-aged parents to work. When childcare is available, it is often only available on weekdays. Parents of young children who work on weekends need childcare on the weekends, too.<sup>46</sup> Due to financial constraints, parents may need to make the difficult choice to go to work even without childcare. A resident shared, “The other mental pandemic is that parents leave their children alone to go to work and it is the older siblings who raise the younger ones.”<sup>47</sup> It is even tougher to find adequate care and education support for children with disabilities. One parent shared that they are waiting for an appointment with the one doctor in the county who can diagnose their son with autism; without a formal diagnosis, he cannot receive accommodations

<sup>42</sup> Listening Session, New Cuyama, August 6, 2023.

<sup>43</sup> Listening Session, San Luis Obispo, August 14, 2023.

<sup>44</sup> Listening Session, Fillmore, Ventura, October 20, 2023.

<sup>45</sup> Listening Session, Salinas, Monterey, September 28, 2023.

<sup>46</sup> Listening Session, Salinas, Monterey, August 29, 2023.

<sup>47</sup> Listening Session, Greenfield, Monterey, August 16, 2023.

in school or early interventions critical to his development.<sup>48</sup> Residents without documentation or social security numbers –immigrant or Indigenous community members- face additional barriers to accessing healthcare and are sometimes even rejected from hospitals during emergencies.<sup>49</sup> Some residents might be reluctant to seek care due to experience-informed fear of mistreatment or discrimination.<sup>50</sup> Unfortunately, filling the gap of care providers is often not the most compelling opportunity from a talent recruitment and retention perspective because these roles are often overworked and underpaid. However, they do offer some, albeit very few, quality job opportunities that, if filled, could benefit employees, employers, and the broader community.

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<sup>48</sup> Listening Session, Greenfield, Monterey, August 16, 2023.

<sup>49</sup> Listening Session. Salinas, Monterey. November 9, 2023.

<sup>50</sup> Listening Session. Salinas, Monterey. November 9, 2023.

## Childcare access is a serious constraint for workers and families.

Access to affordable childcare is a nationwide crisis, straining family budgets (when care can be secured) and workers' ability to participate in the labor market (when care cannot be secured). The latter burden typically falls disproportionately on women, impacting their quality of life and ability to succeed in the labor market.

Data confirms community input that demand for childcare vastly outstrips spaces throughout the Central Coast (see Figure 28). The gap is widest in Santa Barbara, where spaces are available for only 14.4 percent of children and Monterey / San Benito Counties, where spaces are available for only 16.9 percent of children age zero to 12. San Luis Obispo and Santa Cruz meet the highest percentage of need, offering spaces for 36.2 and 36.3 percent of children respectively.<sup>51</sup>

**Figure 28: Estimated Percentage of Children Ages 0-12 with Parents in the Labor Force for whom Licensed Child Care Spaces are Available, by County, 2021**

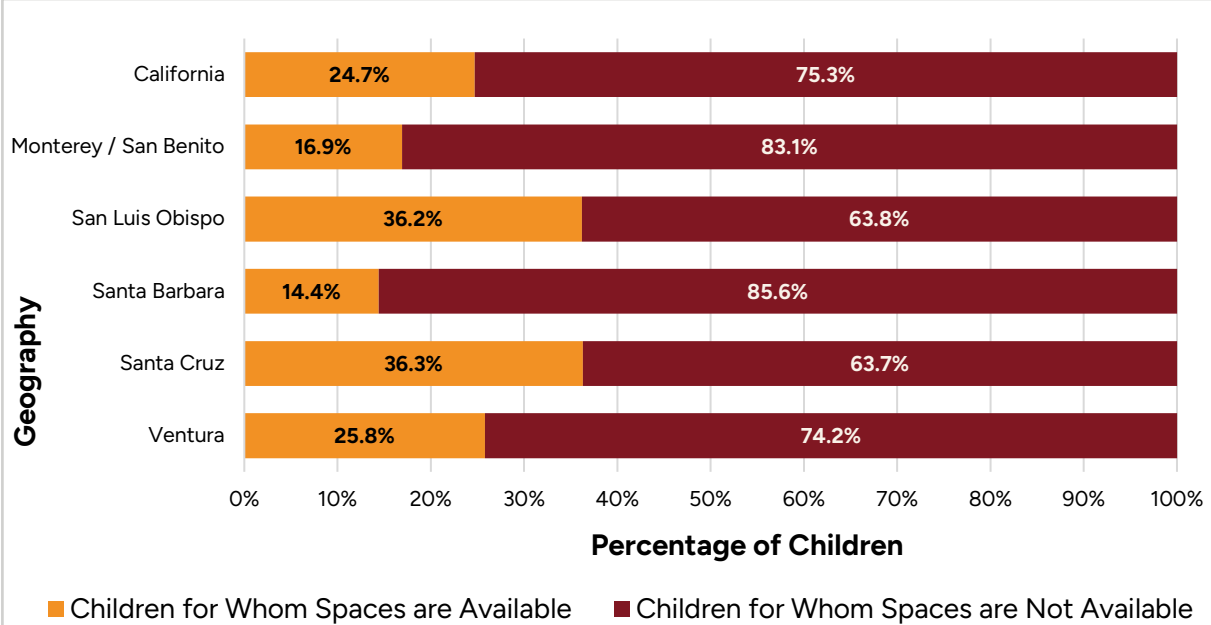
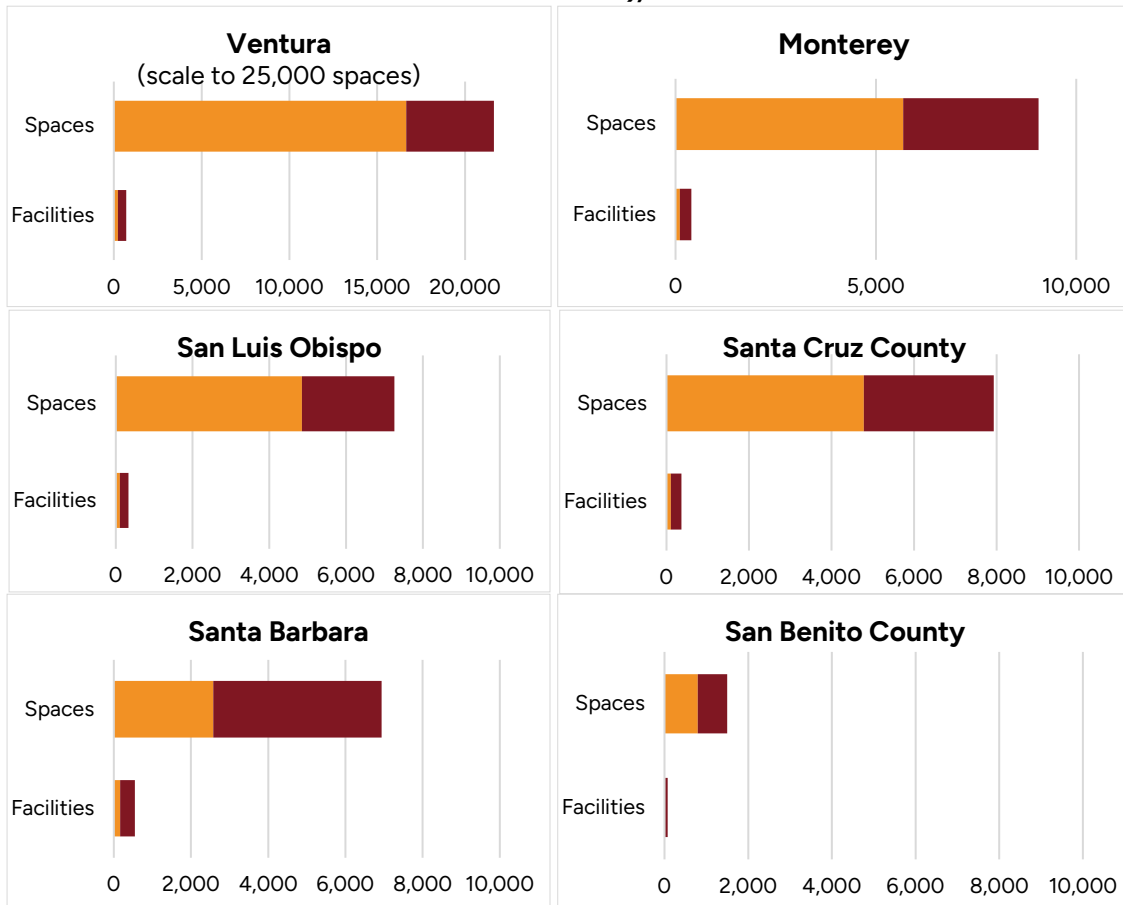


Figure 28: Source: Analysis of California Child Care Resource and Referral Network, California Child Care Portfolio (Nov. 2022); U.S. Census Bureau, American Community Survey public use microdata (Oct. 2022).

Types of childcare available also vary from county-to-county (see Figure 29). Childcare is typically offered in public centers or in homes. The latter can be an opportunity for entrepreneurship and wealth-building for individual proprietors. Santa Barbara County has the highest proportion of childcare spaces in such home-based settings.<sup>52</sup>



**Figure 29: Number of Licensed Childcare Spaces and Facilities by Type of Provider (Center or Home-Based), 2021**



**Legend:** ■ Center ■ Home-Based

Figure 29: Source: Analysis of California Child Care Resource and Referral Network, California Child Care Portfolio (Nov. 2022); U.S. Census Bureau, American Community Survey public use microdata (Oct. 2022).

## 2D. Spanish and English language proficiency is a significant factor in job eligibility, disproportionately impacting Hispanic/Latino/x/e, Black, and Indigenous Central Coast residents.

Spanish speakers who do not know English, commonly immigrants, are often denied jobs and face harassment due to their immigration status. Black English speakers shared that they are similarly penalized for not knowing Spanish, disqualifying them from jobs that they would otherwise be qualified to do in areas such as education and health care. To address this, residents

shared the desire for the public school system to include dual English/Spanish programs to help residents learn both languages earlier.<sup>53</sup> While some adult language classes are available, taking unpaid time off of work for class is a luxury that many residents cannot afford. Indigenous residents who do not speak or write in Spanish nor English are especially impacted. If they are able to find a job, they may face discrimination. In their native language, one Chatina<sup>54</sup> resident shared, “Our supervisor makes fun of us for not speaking Spanish.”<sup>55</sup>

In addition to mistreatment, those who are not English/Spanish-fluent miss information about education and training opportunities, job postings, social services, public health announcements, and other resources key to their financial and personal well-being. Residents expressed interest in a combination of language learning opportunities and increased translation and interpretation services to help promote equitable access to jobs and information, while also honoring the community’s diverse traditional languages and communication norms.

“There need to be more partnerships between nonprofits and housing providers. A critical component to low-income housing is offering services to low-income families, like after school care, food security services, etc. By incorporating food security services for families, it frees up other income to pay the rent.”

Listening Session in San Benito;  
quote provided by Youth All



## 2E. The region’s residents are proud of their communities and desire more resources and stronger partnerships to create economic opportunities.

When asking residents what they like the most about living in the Central Coast during Community Convenings in July 2023, the top answer across all groups was “community.” As found in

<sup>53</sup> Listening Session, Santa Barbara, August 14, 2023.

<sup>54</sup> Chatinos are an Indigenous people of Mexico. Chatino communities are located in the southeastern region of the state of Oaxaca in southern central Mexico. They speak native Chatino language.

<sup>55</sup> Listening Session, Salinas, Monterey, August 17, 2023.

results from Uplift’s Public Opinion Poll, this sentiment extended to every demographic throughout the Central Coast. Even people with different political ideologies and ethnicities agreed that they feel a sense of belonging in their community. Through all of Uplift’s community engagement efforts, residents have made clear that overall, they love living on the Central Coast. They enjoy their communities and the beautiful nature that surrounds them. They just need more quality jobs and resources to make life in the region truly livable. Potential options for partnerships may include recruiting pipelines between industry and local colleges and universities, and public-private partnerships to foster equitable innovation, provide critical skills training and education, and support small businesses. Residents shared many ideas for additional ways that they, their families, and communities can be better supported. As experts of their own experiences, Uplift looks forward to continuing collaborative conversations with residents, organizations, and industries about strategies that can be implemented to equitably benefit the full Central Coast region.

Uplift, in partnership with local organizations, will continue to hold Listening Sessions throughout 2024 to bring more voices of the Central Coast into the process of developing a sustainable, inclusive economic development plan with potential to truly lift up all of the region’s residents. Communities that Uplift intends to increase engagement with include residents of San Benito County and Indigenous communities throughout the region.

### **Uplift Conducted a Public Opinion Poll**

With the support of SJR Opinion Research, Uplift conducted a public opinion poll reaching 1,200 adult Central Coast residents.<sup>56</sup> This survey used mixed research methods of calling cell phones and landlines and contacting residents online to learn about their perceptions of economic development in the region. Survey results revealed deep, widespread financial stress throughout all six counties. While economic factors may drive residents away from the region, respondents across ethnicities and genders reported feeling welcomed locally and feeling a sense of belonging and community in their respective counties and in the region as a whole. To increase feasibility of staying in the region, Central Coast residents’ responses indicated a desire for the following three economic assets:

- 1. Worker Education:** Prioritizing industries and employers that are willing to invest in worker education and training.
- 2. Worker Benefits:** Prioritizing employers that provide exceptional benefits, including sick leave, childcare, comprehensive healthcare, and support for caregivers.
- 3. Affordable Housing:** Developing more housing that is affordable for typical residents.

Survey results align with stories from Community Convening and Listening Session participants, further demonstrating the prevalence of the five key community engagement themes listed in this section.

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<sup>56</sup> A sample size of 1,200 yields a sampling error of +/- 2.8 percent, adequate for the purposes of measuring variables relevant to economic development.

### 3. Extremely high numbers of Central Coast workers and residents struggle to make ends meet.

The Central Coast is an extraordinarily expensive place to live that does not offer enough jobs enabling workers to support themselves and their families. This results in significant numbers of residents – including over a third of workers and more than half of children -- struggling to get by. Outcomes are even worse for those that are younger, less educated, and residents who are Black, Indigenous, or People of Color.<sup>57</sup>

This high number of struggling residents is a dire issue across the region, striking at the heart of aspirations to ensure equity and economic opportunity. Uplift is committed to centering community voices and aspirations in the development of strategies to create more well-paying jobs, improve access to them, and reduce costs of living – essential for building a sustainable, equitable economy.

#### **What Do We Mean by “Struggling Workers”?**

Guided by Committee members, Uplift debated the terminology for describing residents and workers whose income (or families’ income) does not enable them to make ends meet.

“Struggling” workers or families is a commonly used term in public policy research to refer to such community members (see Methodology Sidebar “Calculating a Self-Sufficiency Income”).

However, such language could be perceived as deficit-focused and overlooking the deep grit of these individuals.

In many cases, workers whose incomes do not cover basic costs have “done all the right things.” They work long hours, are driven, and have often pursued educational and training opportunities. Their challenges typically reflect structural issues having to do with the availability of quality jobs and extremely high costs of living, rather than personal attributes.

Ultimately, alternative terminology – such as “striving” or “financially strained” workers – felt opaque or insufficient to capture the challenge. The Central Coast cannot shy away from the large number of its residents who cannot meet basic needs. This reality is not an indictment of these workers; rather, it is a sign of the deep challenges that Uplift is seeking to address.

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<sup>57</sup> Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard and American Community Survey 1-year public-use microdata sample, 2019-2021.

**Figure 30: Share of Population in Families that Struggle to Make Ends Meet**

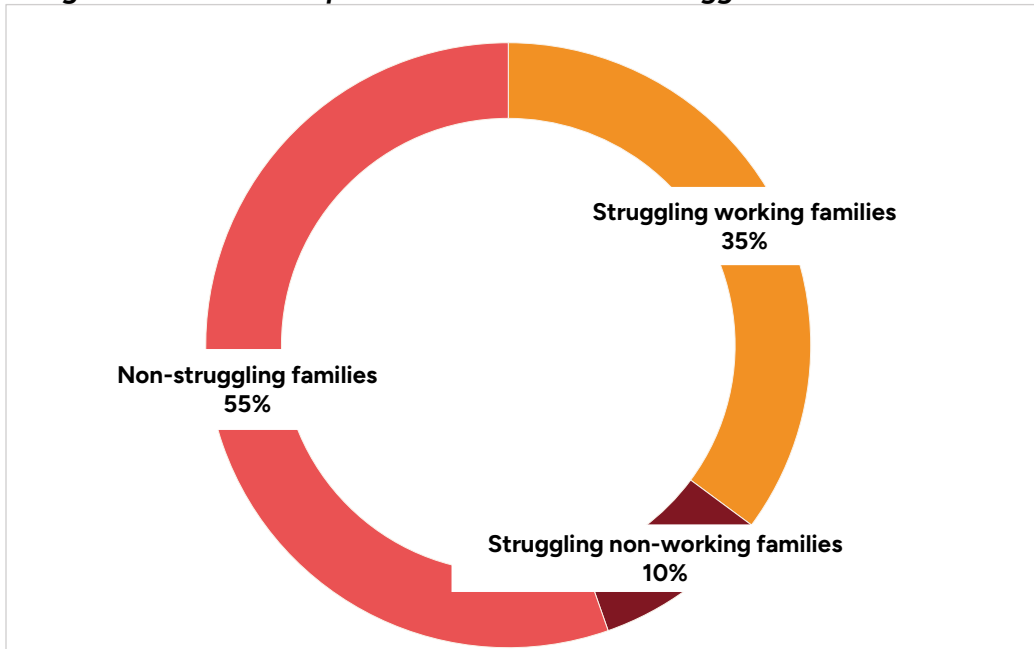


Figure 30: Source: Brookings / Cities GPS analysis.

At least 45 percent of residents in the Central Coast Region belong to a family whose income does not cover the basic costs of living (see Figure 30). This added up to over 1 million residents living in struggling families in 2021.<sup>58</sup>

Of this group, most belong to a family with at least one adult worker, meaning that more than one-third of the region's residents are part of a family that is struggling to make ends meet despite having adults who actively participate in the regional labor market. The rest are struggling non-working families, which are often headed by residents over age 65 who have presumably retired from the workforce.<sup>59</sup>

These trends vary significantly across the six Central Coast counties, with some having higher percentages of struggling families than others. For instance, in San Luis Obispo County, 38 percent of residents are part of a struggling family, compared to more than 53 percent in Santa Barbara County. This reflects that the cost of raising a family in the Central Coast region varies by family composition as well as location, with sizable differences from one county to the next. For example, a young family of four (with one infant, one preschooler, and two working adults) would need to earn \$113,063 to cover their basic expenses in San Luis Obispo County but \$156,671 to do the same in Santa Cruz County, reflecting higher costs of living in the latter.<sup>60</sup>

<sup>58</sup> Approximately 803,000 Central Coast residents belong to struggling working families and 218,000 belong to struggling non-working families.

<sup>59</sup> Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard and American Community Survey 1-year public-use microdata sample, 2019-2021.

<sup>60</sup> Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard and American Community Survey 1-year public-use microdata sample, 2019-2021.

## Methodology: Calculating a Self-Sufficiency Income

Understanding the economic realities facing Central Coast residents requires first determining how much income families need to make ends meet. This self-sufficiency income threshold is determined by employing a highly granular data analysis that assesses the cost of a “market basket” of basic monthly expenses (e.g., housing, food, childcare, transportation, taxes, credits, etc.) across a wide range of family compositions (see Figure 31 for an example of a family of two adults, one infant, and one preschooler).

**Figure 31: Annual Self-Sufficiency Standard for Family with Two Adults (one working full-time) and Two Kids (1 infant, 1 preschooler) on the Central Coast<sup>61</sup>**

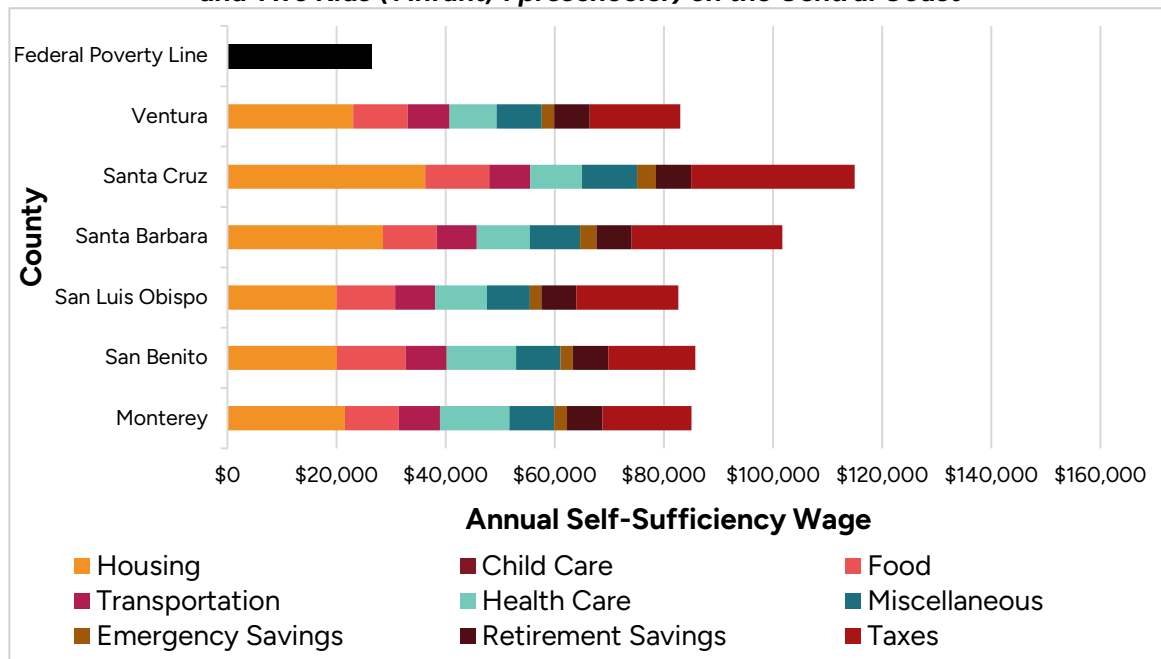


Figure 31: Annual self-sufficiency standard for family with two adults (one working full-time) and two kids (1 infant, 1 preschooler) on the Central Coast, 2021. Source: Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard, with supplemental addition of taxable emergency savings and non-taxable retirement savings.

<sup>61</sup> Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard.

**Figure 32: Annual Self-Sufficiency Standard for Family with Two Adults (both working full-time) and Two Kids (1 infant, 1 preschooler) on the Central Coast<sup>62</sup>**

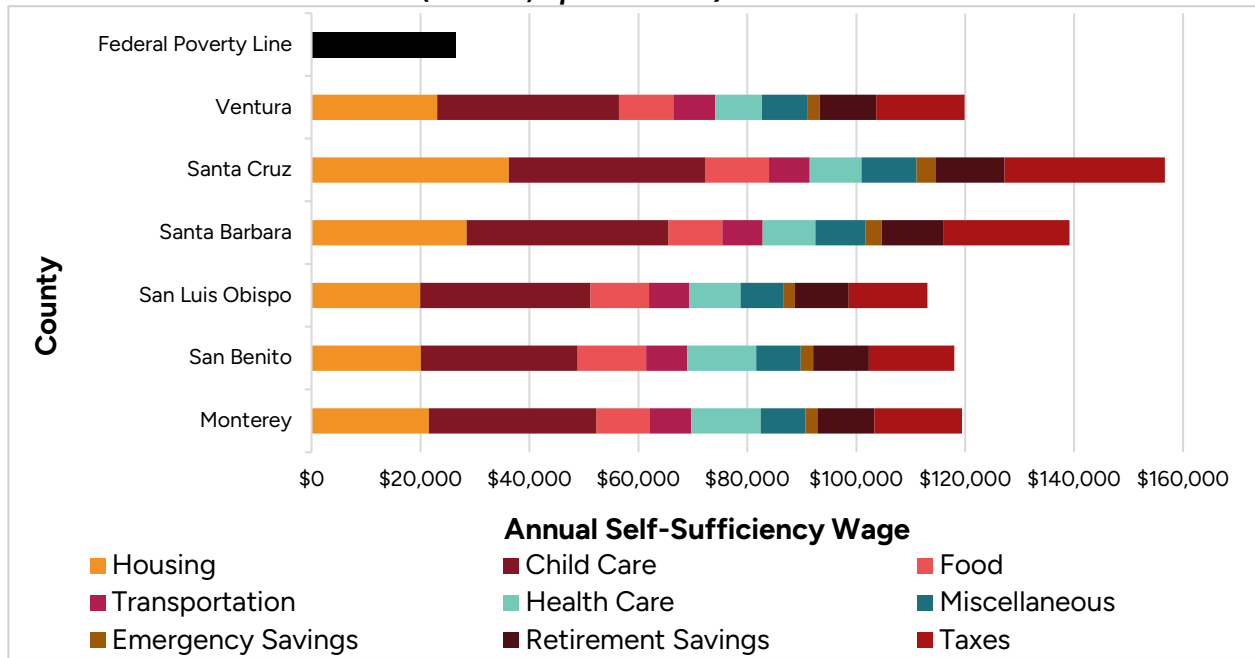


Figure 32: Annual self-sufficiency standard for family with two adults (both working full-time) and two kids (1 infant, 1 preschooler) in the Central Coast, c. 2021. Source: Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard, with supplemental addition of taxable emergency savings and non-taxable retirement savings.

Several national organizations, including the Economic Policy Institute, Massachusetts Institute of Technology (MIT), United Way, and the University of Washington, offer living-wage calculators that estimate how much income is needed to get by in a certain place. Each calculator uses different inputs, data sources, and assumptions, yielding slightly different results. This report uses the University of Washington model, which takes a more moderate approach to inputs and assumptions (e.g., it assumes an average of 2,040 hours worked per year) while also accounting for the fact that expenses fluctuate depending on the age and number of children in a household. In order to better support economic mobility, this report adapts the University of Washington model to add modest savings for emergencies and long-term wealth-building, recognizing the importance for workers to “not just get by, but get ahead.”

However, it is important to note that the **self-sufficiency standard remains a minimum**. Participants in the Uplift Research Committee further reinforced the extreme pressures of housing (in yellow) and childcare (in red) costs, suggesting sub-county variation exceeding the U.S. Department of Housing and Urban Development-sourced county average incorporated in the living wage calculation. **Ultimately, the fact that so many residents are unable to meet even this relatively modest standard reinforces the extreme nature of the region’s equity challenges and elevates the importance of bold, ambitious solutions.**

<sup>62</sup> Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard.



Younger, less formally educated workers, and workers who are Black, Indigenous, or People of Color are more likely to face economic self-sufficiency challenges throughout the Central Coast, reflecting both proxies for labor market experience and skills, systemic inequities, and structural disparities. Non-work-related factors such as race and ethnicity are closely associated with struggling status. Although these characteristics should have no bearing on labor market outcomes, they do correlate with systemic and structural barriers to educational attainment, professional advancement, and economic mobility.

- 51 percent of workers aged 18-24 and 39 percent of workers aged 25 to 34 struggle across the region, compared to 32 percent of 35 to 54 year olds and 20 percent of 55 to 64 year olds.
- 60 percent of workers with less than a high school diploma and 42 percent with a diploma or General Educational Development (GED) struggle, compared to 27 percent with an associate's degree and 16 percent with a bachelor's degree or higher.
- 47 percent of Hispanic/Latino/x/e workers struggle, compared to 28 percent of Black workers, 24 percent of Asian and Pacific Islander workers, 22 percent of American Indian workers, and 21 percent of white workers. This discrepancy may be in part attributable to Hispanic/Latino/x/e workers who are more likely to be employed in lower-wage industries, such as agriculture. They likely also face barriers such as English language proficiency and immigration status.
- Roughly 33 percent of both men and women struggle.<sup>63</sup>

These rates vary between counties, reflecting different industry, labor market, and cost of living dynamics. For instance:

- 77 percent of workers without a high school diploma struggle in Santa Cruz County, versus 47 percent in San Luis Obispo County.
- 43 percent of associate's degree holders struggle in Santa Barbara compared to 22 percent in Ventura.
- 58 percent of Hispanic/Latino/x/e workers struggle in Santa Cruz, compared to 33 percent in San Benito.
- 36 percent of Black workers struggle in San Luis Obispo compared to 22 percent in Ventura.<sup>64</sup>

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<sup>63</sup> Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard and American Community Survey 1-year public-use microdata sample, 2019-2021.

<sup>64</sup> Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard and American Community Survey 1-year public-use microdata sample, 2019-2021.

The majority of struggling workers in the Central Coast are at an age when people are most likely to be starting or actively raising a family. Indeed, 48.1 percent of parents in the region struggle to make ends meet, with higher rates for single parents (67.7 percent) than married parents (38.8 percent).<sup>65</sup>

High costs of living and a lack of well-paid jobs tend to have an especially negative impact on workers in this age cohort. Economic insecurity at this age can impede major life decisions about household formation, whether or when to start a family, and the level of resources available to invest in one's self and children.

**Over 55 percent of the region's children are growing up in working families with incomes that fail to cover basic needs.**

Another five percent belong to struggling families without an adult worker. The percentage of children affected differs from one county to the next, reflecting differences in demographics and access to economic opportunities. But across all six counties, the proportion of children in struggling families (where workers' income does not cover the basic costs of living) exceeds that of other age groups.<sup>66</sup>

Abundant research shows that children who grow up in resource-constrained families face higher barriers to success as adults, which contribute to insufficient household income being a multigenerational challenge. Interventions that help prime-age workers in struggling families access better work opportunities can thus help improve prosperity across generations.

Ultimately, no one-size-fits-all solution can address the wide range of workers' needs and concerns. Strategies and programming designed with this broad spectrum of lived experience in mind will better meet people where they are and connect them with necessary resources to advance economically.

### **Barriers are Not Experienced Equitably**

Certain groups of workers tend to face particularly significant barriers to labor market success. These include (but are not limited to) persons with disabilities, the formerly incarcerated, and the undocumented. While the self-sufficiency analysis above did not specifically examine these groups, it is likely that they are among those who struggle to make ends meet.

**"If there's extreme heat or rain, work gets suspended and we don't make any income that day. We would like to get paid in full those days."**

Listening Session in Monterey with Chatinos



<sup>65</sup> Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard and American Community Survey 1-year public-use microdata sample, 2019-2021.

<sup>66</sup> Brookings / Cities GPS analysis of University of Washington Self-Sufficiency Standard and American Community Survey 1-year public-use microdata sample, 2019-2021.

#### 4. Significant environmental hazards are experienced inequitably.

The Central Coast faces environmental hazards with serious short-term and long-term impacts on residents' public health, and the economy. Risks tend to be particularly severe for outdoor agricultural workers, compounding challenges that this predominantly Black, Indigenous, and People of Color population faces around low wages and associated access to support and services. However, impact is not limited to this group; across five Community Convenings that Uplift held in July 2023, a majority of participants (64 percent) felt that extreme weather events have had at least a moderate effect on their lives in the past five years.<sup>67</sup>

Rising temperatures and extreme heat are a concern for the region. In the short-term, Ventura and Santa Barbara Counties are among the fastest-warming parts of the entire United States.<sup>68</sup> While the Central Coast as a whole is projected to have fewer than or close to the State average of extreme heat days per year by the middle and end of the century (see Figure 33), those extreme heat days still carry considerable longer-term risk.

Health impacts range from dehydration to conditions such as kidney illness for outdoor workers.<sup>69</sup> Extreme heat can also exacerbate existing conditions such as cardiovascular, respiratory, and diabetes-related conditions.<sup>70</sup> 17.57 percent of employed people in Monterey County work outdoors (see Figure 34), compared to the state average of just 7.61 percent, making these workers particularly susceptible.<sup>71</sup> Santa Cruz, San Benito, Santa Barbara, and Ventura Counties also have higher-than-state-average proportions of people who are employed outdoors, placing them at both short-term and long-term risk of occupational hazards.<sup>72</sup>

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<sup>67</sup> Community Convenings, July 2023, Polling question: "To what extent have extreme weather events affected your life in the past 5 years? Answer choices ranged from not affected to significantly affected. 106 people responded to the poll. 49 respondents said "moderately affected" and 19 said "significantly affected."

<sup>68</sup> Scott Wilson, "Fires, floods and free parking: California's unending fight against climate change," The Washington Post, December 2019, <https://www.washingtonpost.com/graphics/2019/national/climate-environment/climate-change-california/>.

<sup>69</sup> For Central Coast data, see Climate Change & Health Vulnerability Indicators for California, CalBRACE, California Department of Public Health, Climate Change and Health Equity Section, <https://skylab.cdph.ca.gov/CCHVlz/>. For health impacts, see US Global Change Research Program, Fifth National Climate Assessment, Chapter 28: Southwest, <https://nca2023.globalchange.gov/chapter/28/>.

<sup>70</sup> World Health Organization. Heat and Health. June 1, 2018. <https://www.who.int/news-room/fact-sheets/detail/climate-change-heat-and-health>.

<sup>71</sup> Projected exposure to extreme heat also varies within counties. The following areas within each county are among those projected to face the most risk by mid-century: Boulder Creek and Davenport (Santa Cruz), Bradley/San Ardo, Chualar/Gonzalez/Greenfield/Soledad, and King City/San Lucas (Monterey); Hollister/Paicines/Panoche/San Juan Bautista (San Benito); Atascadero/Templeton and El Paso de Robles/Lake Nacimiento/San Miguel/Shandon (San Luis Obispo); Buellton/Los Olivos/Santa Ynez/Solvang and Carpinteria/New Cuyama/Summerland/Toro Canyon (Santa Barbara); Meiners Oaks/Oak View/Ojai, Simi Valley East, Simi Valley West/Thousand Oaks East, Fillmore/Los Padres National Forest/Piru/Santa Paula/Saticoy, and Thousand Oaks Central and West (Ventura).

<sup>72</sup> Climate Change & Health Vulnerability Indicators for California, CalBRACE, California Department of Public Health, Climate Change and Health Equity Section, <https://skylab.cdph.ca.gov/CCHVlz/>.

**Figure 33: Projected Number of Extreme Heat Days per Year**

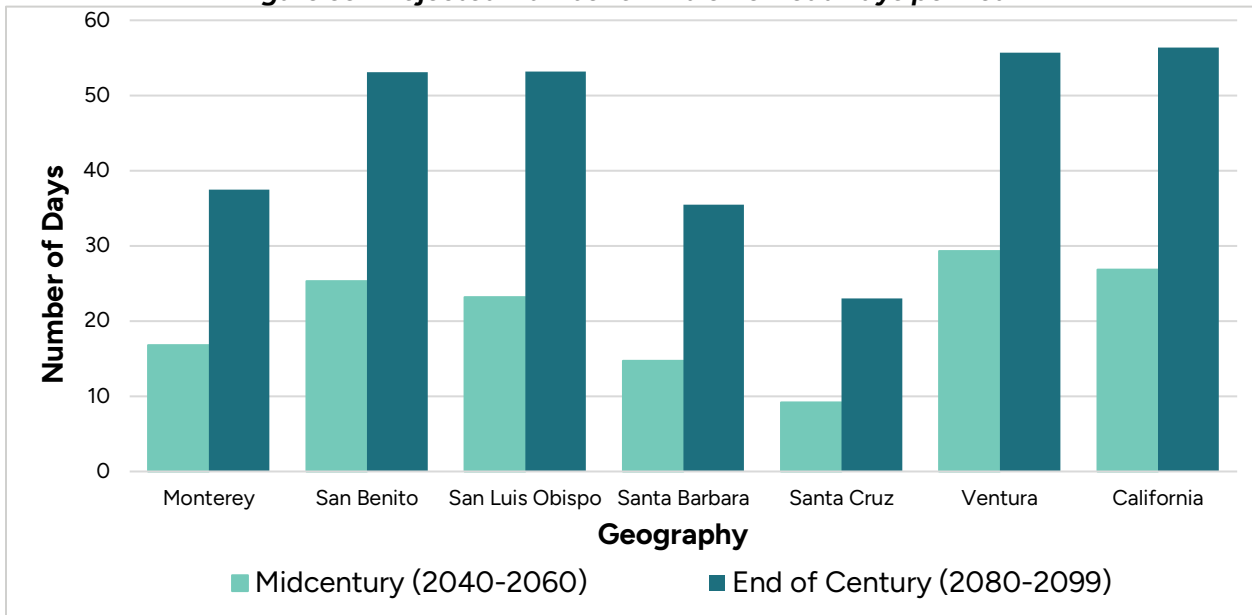


Figure 33: Projected number of extreme heat days per year, by county, for midcentury and end of century. Source: Climate Change & Health Vulnerability Indicators for California, CalBRACE, California Department of Public Health, Climate Change and Health Equity Section.

**Figure 34: Outdoor Workers in the Central Coast Region**

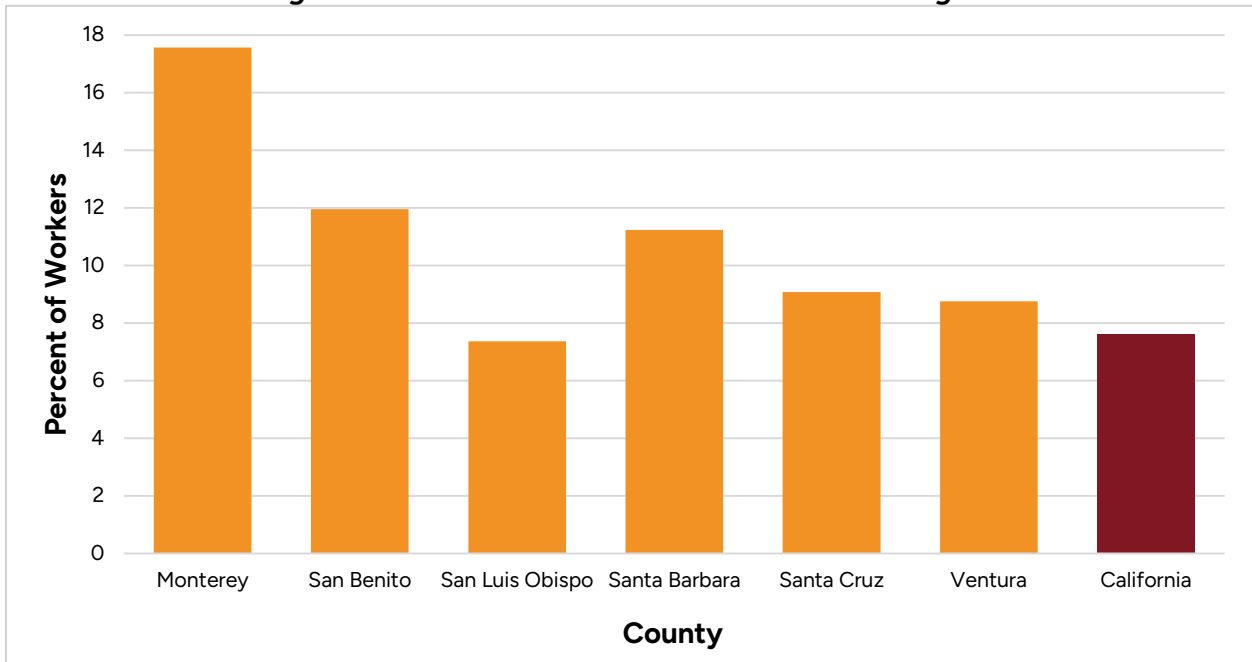


Figure 34: Percent of population over 16 and employed working outdoors. Source: Climate Change & Health Vulnerability Indicators for California, CalBRACE, California Department of Public Health, Climate Change and Health Equity Section.

Rising temperatures contribute to grave wildfire risk in parts of the region. Ventura County, for instance, significantly exceeds the state average in the percent of population currently living in a high risk wildfire zone (see Figure 35). Within Ventura County, risks are particularly severe in areas such as Thousand Oaks Central and West, Simi Valley East, Simi Valley West/Thousand Oaks East / Meiners Oaks/Oak View/Ojai, and Camarillo / Moorpark.<sup>73</sup> Santa Barbara has also seen significant wildfires, especially concentrated around the areas of Goleta North, Mission Canyon, Montecito, Riviera, and Santa Barbara North.<sup>74</sup> These instances, such as the Thomas Fire of 2018, have precipitated major losses to regional tourism and other industries and encumbrance of major transportation infrastructure, such as Highway 101. In 2020, wildfires in Monterey County also resulted in significant losses to the region's grape harvest and wine production.

The region's wildfire risks are illustrative of both the public health and economic impacts of environmental hazards, including for disinvested populations. Wildfires have been associated with a range of negative health effects, heightening concern for farmworkers, who are often particularly exposed.<sup>75</sup> These negative health effects include cancer, respiratory, and cardiovascular illnesses. As referenced above, they also threaten the short-term profits and long-term sustainability of industries such as agriculture and hospitality/tourism, particularly as rising temperatures increase risk. For these industries, wildfires (and the associated ash and smoke) damage crops, disrupt operations, and prevent or discourage tourists from visiting the area. Wildfires also contribute to electrical grid instability because of the preventative shut-off measures they require. Electrical grid instability encumbers industry growth in areas including manufacturing. Ironically, stakeholders said it also limits deployment of electric vehicle charging infrastructure and home electrification associated with policy goals to lower emissions and overall climate impact.

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<sup>73</sup> Climate Change & Health Vulnerability Indicators for California, CalBRACE, California Department of Public Health, Climate Change and Health Equity Section, <https://skylab.cdph.ca.gov/CCHViz/>. In other counties, areas of highest risk include Carmel Valley/Castroville/Marina/Moss Landing/Ord, Big Sur / Lucia (Monterey), Hollister/Paicines/Panoche/San Juan Bautista (San Benito), El Paso de Robles/Lake Nacimiento/San Miguel/Shandon (SLO), and Goleta North/Mission Canyon/Montecito/Riviera/Santa Barbara North (Santa Barbara).

<sup>74</sup> Climate Change & Health Vulnerability Indicators for California, CalBRACE, California Department of Public Health, Climate Change and Health Equity Section, <https://skylab.cdph.ca.gov/CCHViz/>.

<sup>75</sup> US Global Change Research Program, Fifth National Climate Assessment, Chapter 28: Southwest, <https://nca2023.globalchange.gov/chapter/28/>.

**Figure 35: Wildfire Risk to Population in the Central Coast**

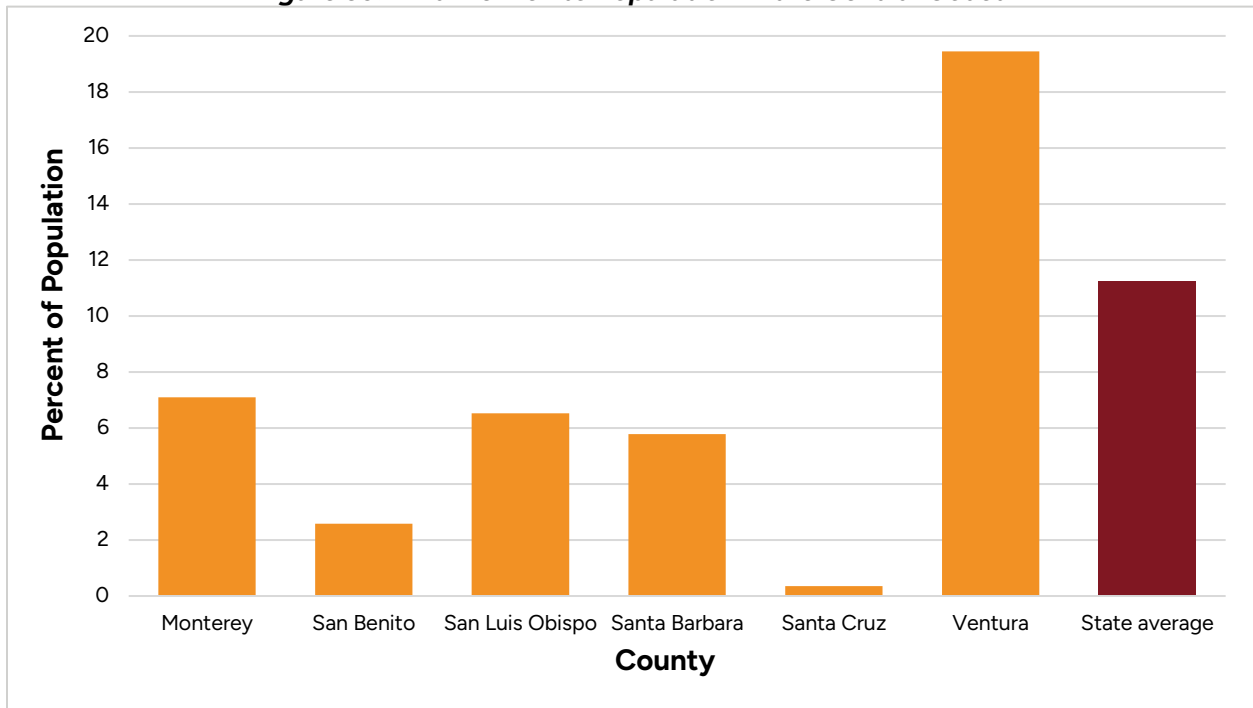


Figure 35: Source: *Climate Change & Health Vulnerability Indicators for California*, CalBRACE, California Department of Public Health, Climate Change and Health Equity Section.

Flooding and coastal erosion associated with rising sea levels and extreme weather events have also strained infrastructure in areas throughout the Central Coast in recent years, impacting industries such as hospitality and agriculture. These phenomena also reduce overall land available for housing and industry development, affecting a broader range of residents and businesses. Major incidents include heavy rain making Highway 1, a major thoroughfare used by residents, industry, and tourists, inaccessible in areas around Big Sur and Watsonville. Rain and flooding have also contributed to cataclysmic mudslides in areas such as Santa Barbara, the flooding of the entire community of Pajaro in Monterey County, and devastating storm surf damage across Santa Cruz County. Santa Cruz (6.43 percent) and Monterey (3.27 percent) are among the areas with the greatest population density situated in areas vulnerable to sea level rise, exceeding the state average (1.57 percent), but falling short of other areas, such as San Mateo and Marin in the San Francisco Bay Area (both about 17 percent).<sup>76</sup> Sea level rise also has implications for land use decisions and may increase costs associated with building in riskier areas.

**“The hotel where I work as a housekeeper is cutting their operating hours because there isn't enough water.”**

Listening Session in New Cuyama



<sup>76</sup> Climate Change & Health Vulnerability Indicators for California, <https://skylab.cdph.ca.gov/CCHVlz/>.

While, while sea levels are anticipated to rise, the region's groundwater availability is diminishing. This phenomenon poses significant challenges for communities reliant on groundwater for both drinking and agriculture. In New Cuyama, where constraints are particularly severe and could lead to displacement, residents and farmers recently launched a grassroots boycott of "big carrot" companies that draw significantly from regional water basins and have sought to control water rights.<sup>77</sup> As recently headlined in the New York Times<sup>78</sup> (see Image 1), this case illustrates tensions between industry and residents for scarce, essential natural resources.



Image 1: The New York Times headline on December 14, 2023.

Beneath these overall trends and drivers, rates of environmental Disadvantage Tracts<sup>79</sup> in the Central Coast tend to be concentrated in a select number of Census tracts, versus their wide reach across areas such as the Central and San Joaquin Valleys, Los Angeles, and the Inland Empire.<sup>80</sup> However, the Central Coast sees clear racial disparities in the population of its disadvantaged tracts; Hispanic/Latino/x/e residents are most likely to live in an environmentally burdened area throughout the Central Coast, while white residents are less likely to live in such an area (see Figure 36). For instance, one Disadvantaged Tract near Watsonville with 5,024 residents (88.61 percent of whom are Hispanic/Latino/x/e) ranks in the top percentile of tracts for pesticides and impaired waters, along with the 89<sup>th</sup> percentile for lead from housing. Another tract of 5,072 residents (97.91 percent Hispanic/Latino/x/e) in Oxnard also ranks in the top percentile for pesticides, along with the 98<sup>th</sup> percentile for impaired waters, 88<sup>th</sup> percentile for hazardous waste, and 79<sup>th</sup> percentile for traffic.<sup>81</sup> This suggests that environmental hazards pose particular risks for disinvested communities.

Specific areas of environmental disadvantage include several adjacent tracts near Watsonville and the northern border of Monterey County, tracts near Marina and Salinas in Monterey County, part of northern Santa Barbara County encompassing Guadalupe, part of Goleta in

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<sup>77</sup> For water trends in the Cuyama Valley, see U.S. Geological Survey. Cuyama Valley Water Availability Study. <https://ca.water.usgs.gov/projects/cuyama/>. For the "big carrot" boycott, see Melinda Burns, "Cuyama Valley launches carrot boycott as water rights issue plays out," Santa Maria Times, October 2023, [https://santamariatimes.com/news/local/cuyama-valley-launches-carrot-boycott-as-water-rights-issue-plays-out/article\\_e4d1d8db-79ae-57d1-93c5-c7e10f1109e7.html](https://santamariatimes.com/news/local/cuyama-valley-launches-carrot-boycott-as-water-rights-issue-plays-out/article_e4d1d8db-79ae-57d1-93c5-c7e10f1109e7.html).

<sup>78</sup> Claire O'Neill, Matt McCann and Umi Syam, "Who Gets the Water in California? Whoever Gets There First," The New York Times. December 14, 2023. [https://www.nytimes.com/interactive/2023/12/14/climate/california-water-crisis-drought.html?unlocked\\_article\\_code=1.F00.2U1r.QnVGN2KVMEl&smid=url-share](https://www.nytimes.com/interactive/2023/12/14/climate/california-water-crisis-drought.html?unlocked_article_code=1.F00.2U1r.QnVGN2KVMEl&smid=url-share).

<sup>79</sup> "Disadvantage" is defined as a high score in the State of California's "CalEnviroScreen" model weighing a range of pollution burden and population indicators, reflecting the intertwined nature of environmental, health, and socioeconomic challenges.

<sup>80</sup> The California Environmental Protection Agency designates census tracts as "disadvantaged" based on their score in the agency's CalEnviroScreen model. For more on the CalEnviroScreen methodology, see California Office of Environmental Health Hazard Assessment, Cal EnviroScreen, Scoring & Model, <https://oehha.ca.gov/calenviroscreen/scoring-model>. For more on the definition of "disadvantaged" and its implications for climate investments, see California Environmental Protection Agency, "California Climate Investments to Benefit Disadvantaged Communities," May 2022, <https://calepa.ca.gov/envjustice/ghginvest/>.

<sup>81</sup> California EPA, Cal EnviroScreen 4.0.



southern Santa Barbara County, and areas within and proximate to Oxnard in Ventura County. Other areas of elevated environmental impact short of Disadvantaged Tracts include areas of southern Monterey County near Gonzales and Greenfield, parts of Santa Maria, Lompoc, and Santa Barbara in Santa Barbara County, and parts of San Buenaventura and areas near Santa Paula, Camarillo, and Moorpark in Ventura County.<sup>82</sup> Many of these areas contain significant agricultural activity, exposing outdoor workers and residents to pesticides, air pollution, and other hazards tied to serious adverse health outcomes. This suggests that the burden of environmental hazards and climate change falls disproportionately on Hispanic/Latino/x/e residents and farmworkers.

**Figure 36: Demographics of Disadvantaged Tracts in the Central Coast Region**

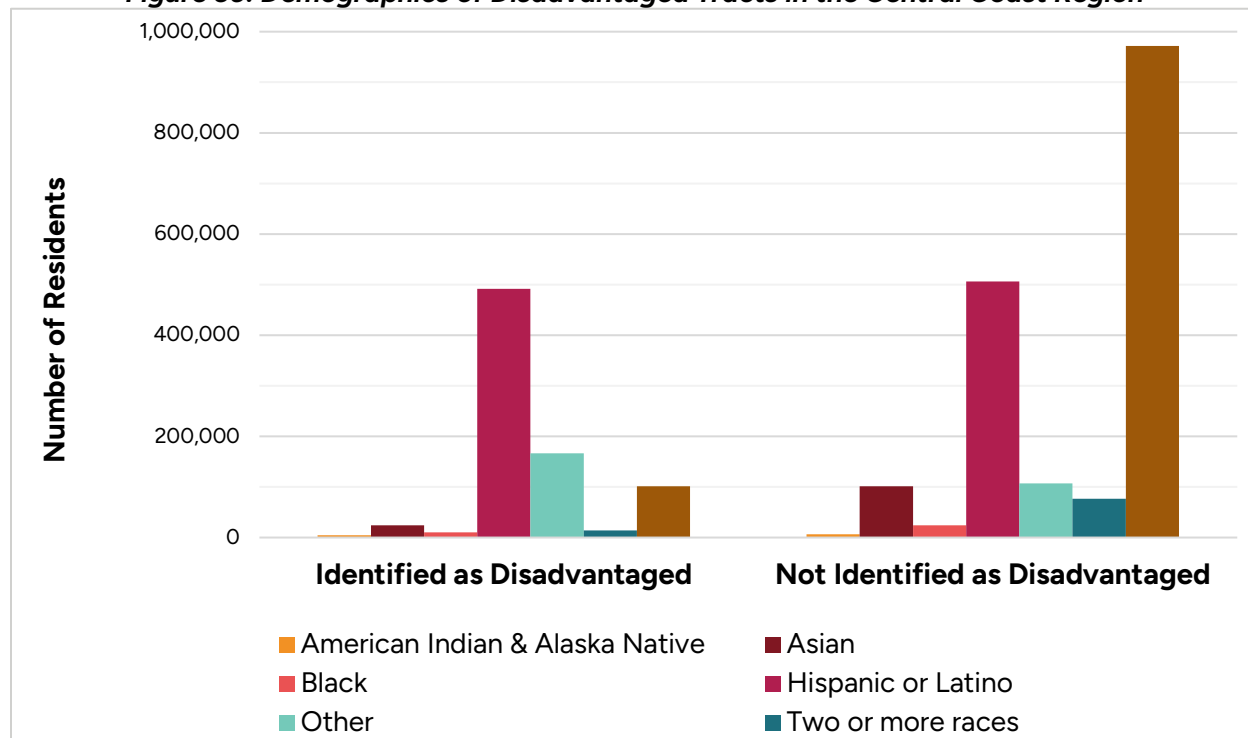


Figure 36: Demographics of CalEPA-designated disadvantaged Census tracts in the Central Coast. Tracts are identified as disadvantaged based on geographic, socioeconomic, public health, and environmental hazard criteria. Source: CalEnviroScreen 4.0, CalEPA.

These disparities elevate the importance of environmental justice efforts to reduce burdens on impacted populations. Strategies underway in the Central Coast include the promotion of “climate-smart agriculture” practices, such as range management, to reduce emissions, curb pesticide use, and conserve water. Weather events and long term climate trends are likely to negatively impact agricultural crop yields in the Central Coast Region and beyond. This could put pressure on farms in the region who may already be operating on thin margins, potentially resulting in reduced agriculture worker jobs and exacerbating food insecurity. Other efforts include the establishment of “resilience hubs” offering impacted populations access to safe locations and resources during climate events.

Advocates, including the Monterey Bay Climate Justice Collaborative, Central Coast Climate Justice Network, and Community Environmental Council, are also working to create

<sup>82</sup> California EPA, Cal EnviroScreen 4.0.

opportunities for community wealth-building and to ensure impacted populations can access the benefits of clean energy technologies. This includes the promotion of local, minority-owned landscaping firms specializing in native landscapes to make areas resistant to wildfire risk. Groups are also working to improve electric vehicle ownership by partnering with Promotoras, trained Spanish-speaking community outreach leaders, who are highlighting benefits and available subsidies. Electric vehicle adoption is particularly important because disadvantaged groups often have longer commutes, resulting in higher gas costs, pollution exposure, and emissions.

## Industry Impacts on the Environment

Different industries have variable impacts on the environment, spanning factors such as greenhouse gas (GHG) emissions, critical and hazardous air emissions, land use, water usage, releases to water and the ground, and hazardous waste. Advancing a low-carbon economy requires being attentive to these dynamics, looking for opportunities to ameliorate hazards through sustainable or regenerative practices, and considering trade-offs in industry prioritization. As shown above, disadvantaged communities with Black, Indigenous, and People of Color residents are disproportionately subjected to these environmental hazards.

A review of impacts on the Central Coast suggests that the prevalence of many industry-influenced hazards is on the rise, while an analysis of impacts across each of the six counties offers more context on specific hazards and trends.

**Figure 37: Total Greenhouse Gas Emissions from Industrial Sources by Central Coast County, 2001-2022**

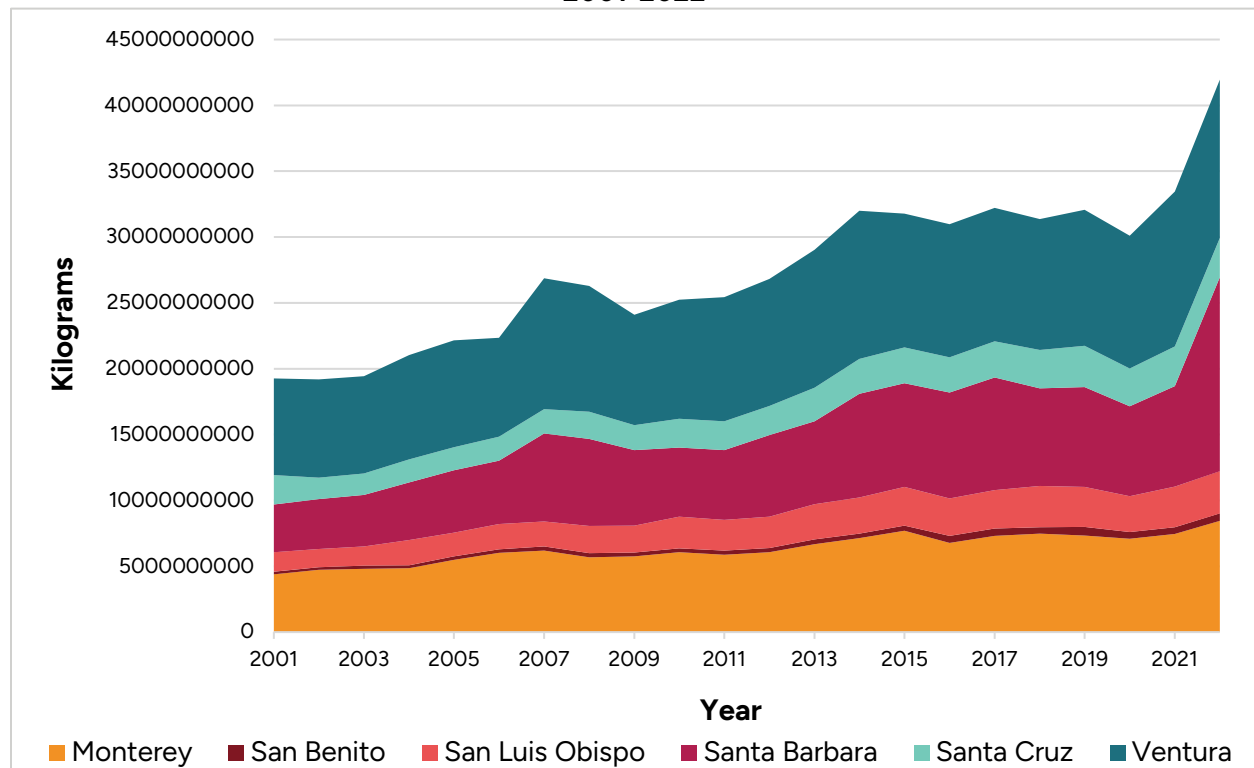


Figure 37: Total Greenhouse Gas emissions from industrial sources in kilograms by Central Coast County, 2001-2022. Note that data provided in this visual is in kilograms rather than the standard unit, metric tons. Source: Analysis of U.S. EPA data and IMPLAN regional industry input-output models.

GHG emissions from industrial sources have risen considerably over the past two decades, particularly in Ventura, Santa Cruz, and Santa Barbara counties (see Figure 37 above). Monterey has grown more slowly, but has a large base of emissions. Overall variation reflects both the size and scale of county economies and the different types of industry activity underway. In 2022, utilities were the largest industry source of GHG emissions in Ventura, San Luis Obispo, and Monterey Counties (see Figure 38 below). Mining, quarrying, oil, and gas dominated emissions in Santa Barbara County. Agriculture (particularly in Monterey) and manufacturing were also notable emissions sources.<sup>83</sup> Statewide analysis by the California Environmental Protection Agency has shown that stationary high-emitting facilities eligible for the State's cap-and-trade program are more likely to be located near disadvantaged communities, contributing to poorer health outcomes.<sup>84</sup>

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<sup>83</sup> Analysis of U.S. EPA data and IMPLAN regional industry input-output models.

<sup>84</sup> Cal EPA, Office of Environmental Health Hazard Assessment, "Impacts of Greenhouse Gas Emission Limits Within Disadvantaged Communities: Progress Toward Reducing Inequities," February 2022, <https://oehha.ca.gov/media/downloads/environmental-justice/impactsofghgpoliciesreport020322.pdf>.

**Figure 38: Greenhouse Gas Emission Output by Industrial Sources, by County, 2022**

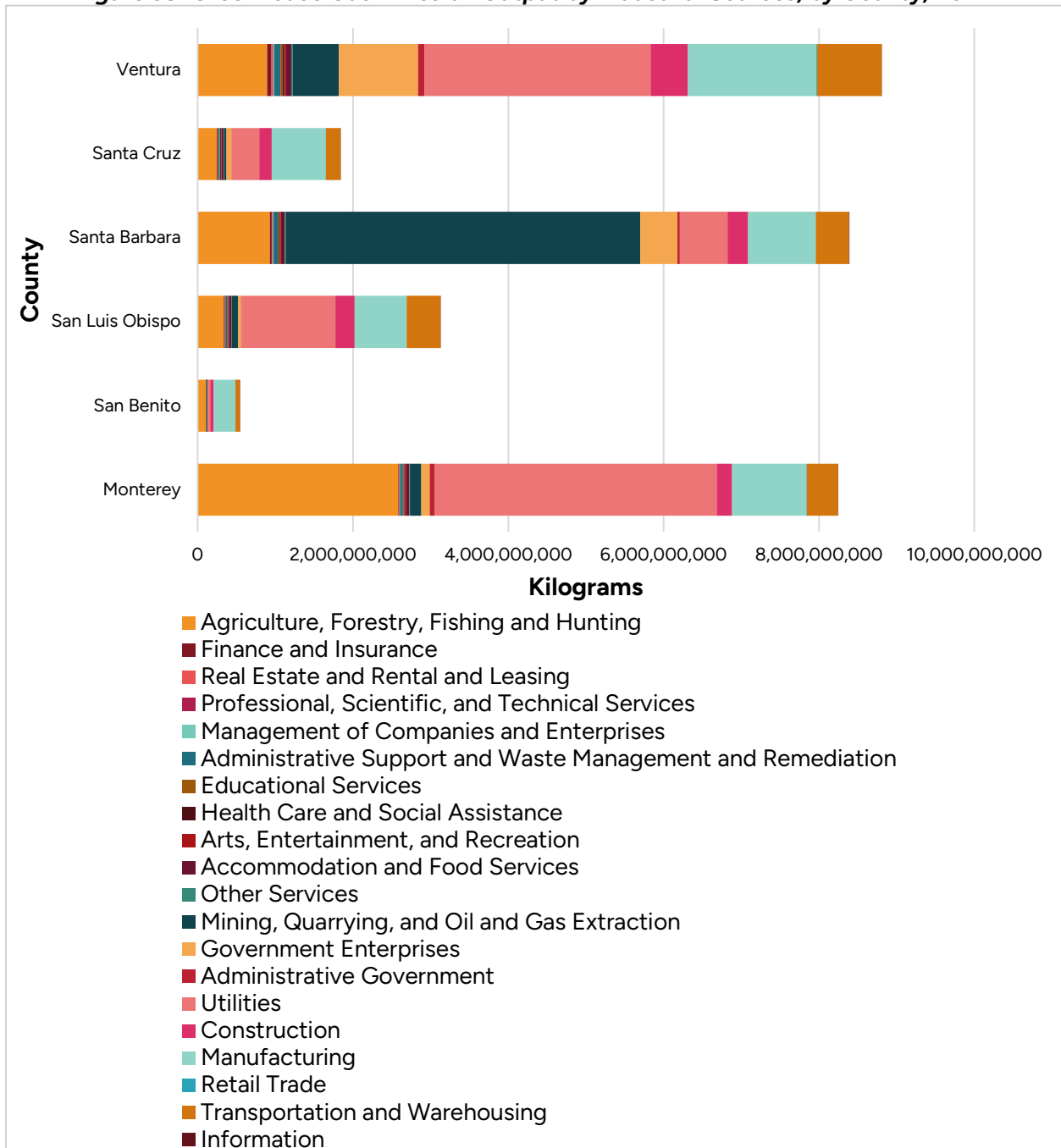


Figure 38: Greenhouse Gas emission output by NAICS sector in kilograms, 2022. Note that data provided in this visual is in kilograms rather than the standard unit, metric tons. Source: Analysis of US EPA data and IMPLAN regional industry input-output models.

Industry output of critical and hazardous air emissions – such as nitrogen dioxide, chromium III, formaldehyde, styrene, and chlorine – has seen volatile growth over the past two decades (see Figure 39). In 2022, emissions in this category were dominated by utilities in each county. Agriculture, mining, and administrative support and waste management and remediation also accounted for smaller contributions.<sup>85</sup>

**Figure 39: Critical and Hazardous Air Emission Output from Industries by County, 2001-2022**

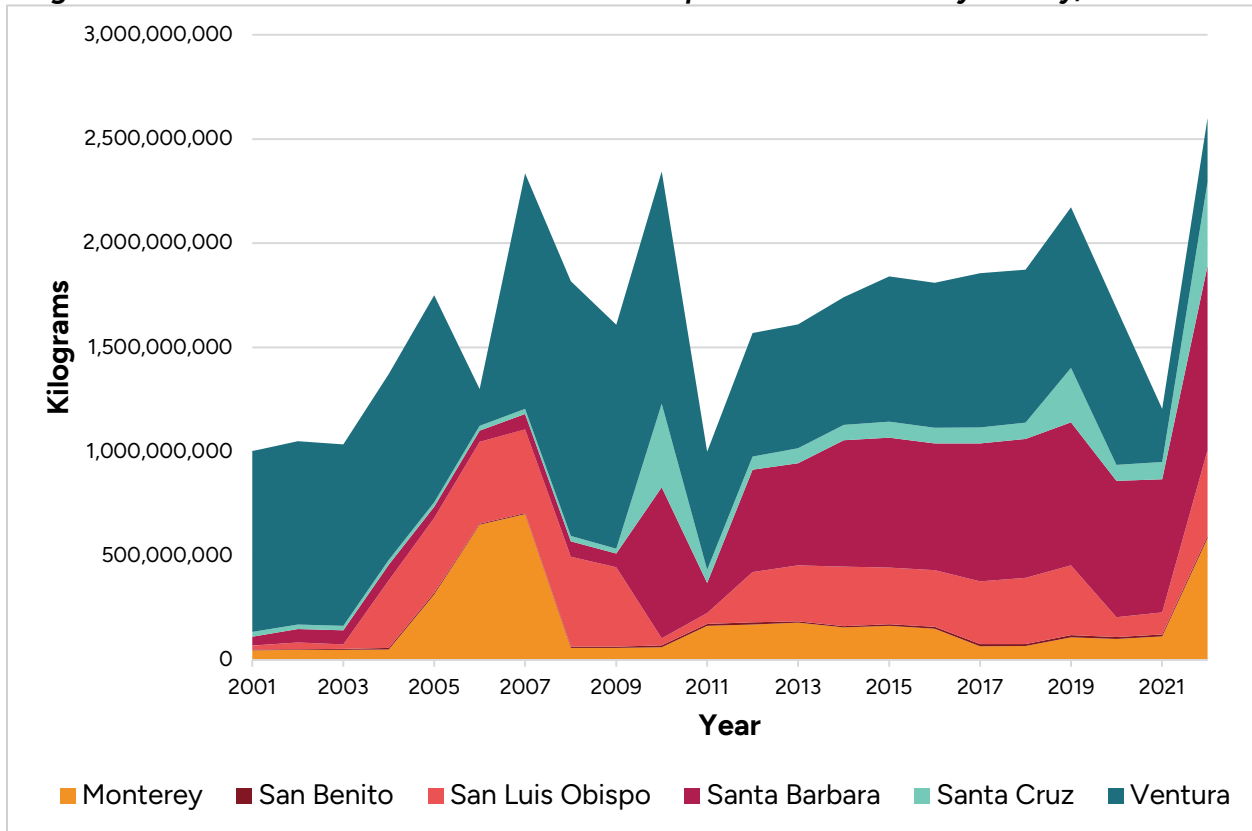


Figure 39: Total critical and hazardous air emissions from industrial sources (e.g., Nitrogen Dioxide, Chromium III, Formaldehyde, Styrene, Chlorine) in kilograms by Central Coast County, 2001-2022. Note that data provided in this visual is in kilograms rather than the standard unit, metric tons. Source: Analysis of U.S. EPA data and IMPLAN regional industry input-output models.

<sup>85</sup> Analysis of U.S. EPA data and IMPLAN regional industry input-output models.

Land use environmental impact from industries has seen steady growth since the early 2000s across Central Coast counties (see Figure 40). As of 2022, this impact was largely driven by agriculture and was particularly significant in Monterey County.<sup>86</sup>

**Figure 40: Land Use Environmental Impact from Industries per Year by County, 2001-2022**

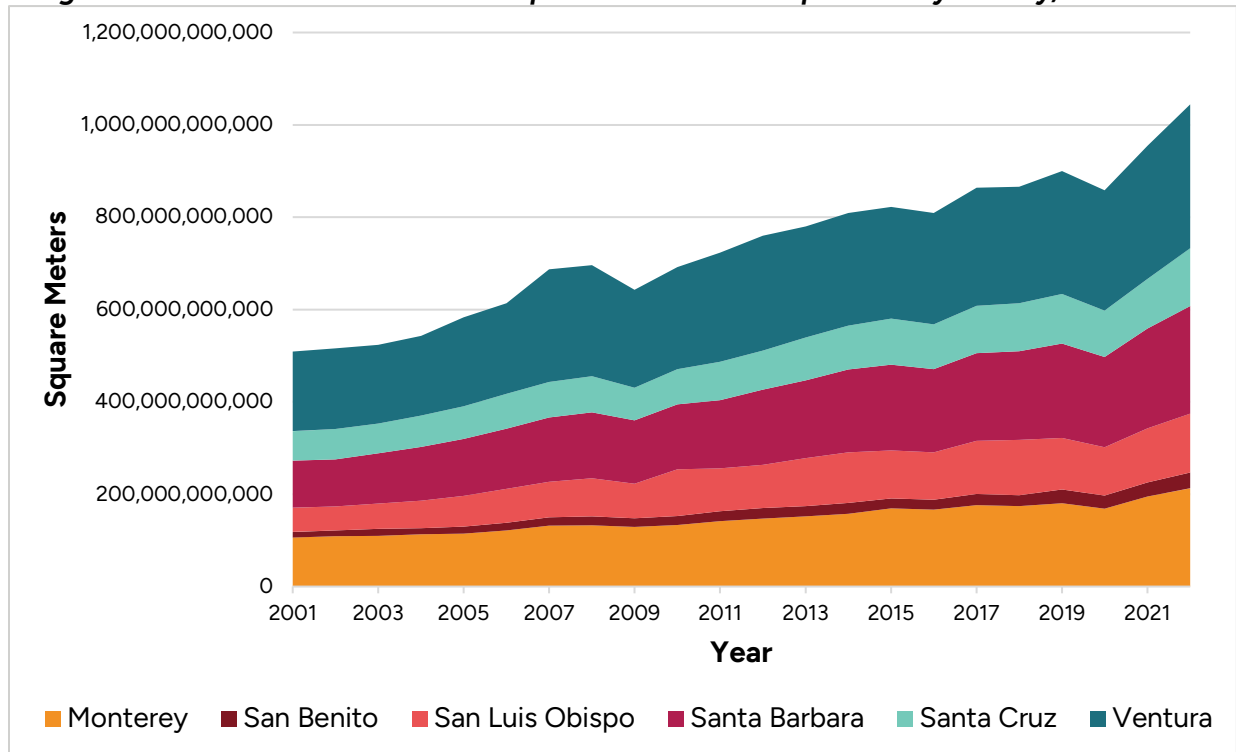


Figure 40: Total environmental impact from industrial land uses in square meters per year (m2\*a) by Central Coast County, 2001-2022. Source: Analysis of U.S. EPA data and IMPLAN regional industry input-output models.

Point source industry releases to both water and ground have also grown significantly since the early 2000s, although at different rates (see Figure 41 and Figure 42). Point source releases to water have followed an inconsistent trend, while point source releases to ground accelerated significantly in Santa Barbara and Ventura Counties in 2006 due to the expansion of mining activity. In 2022, manufacturing drove point source releases to water, with particular impact in San Luis Obispo and Monterey Counties. Mining accounted for the vast majority of point source releases to ground in Santa Barbara, while utilities drove these releases in other counties.

<sup>86</sup> Analysis of U.S. EPA data and IMPLAN regional industry input-output models.

**Figure 41: Environmental Impact from Point Source Releases to Water by County, 2001-2022**

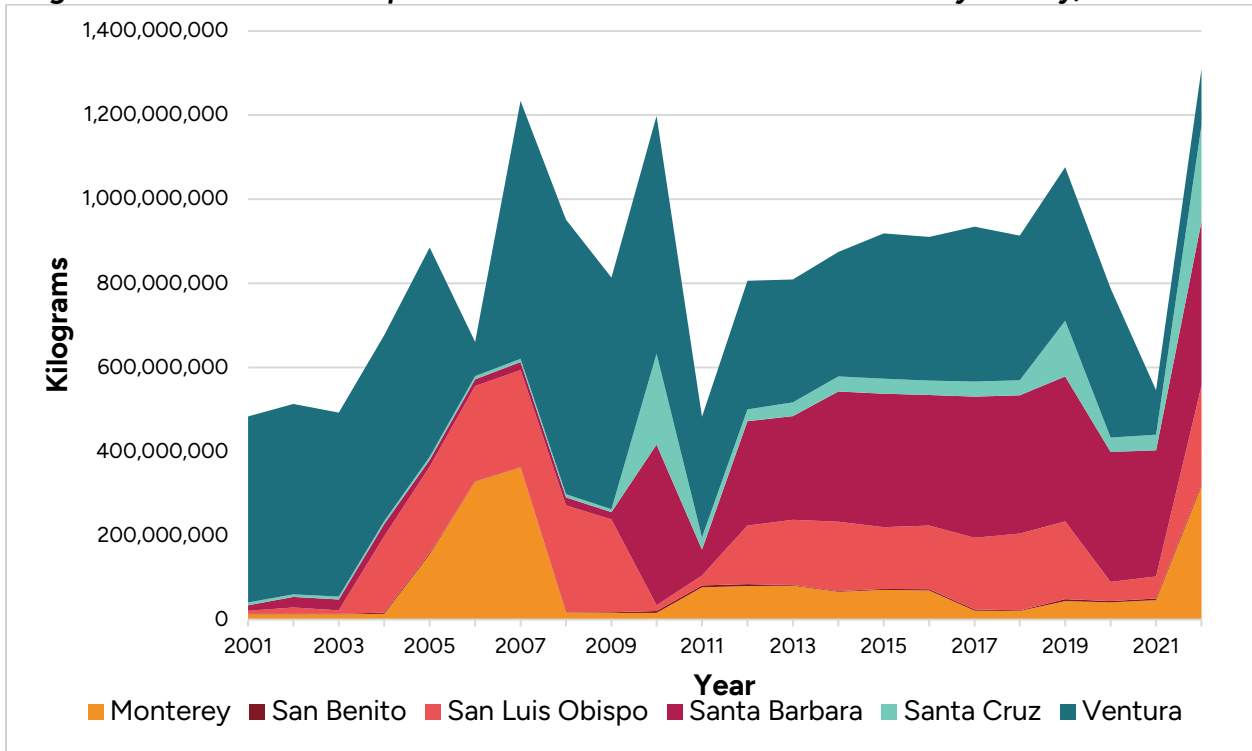


Figure 41: Total point source releases to water from industrial uses in kilograms per year Central Coast County, 2001-2022. Source: Analysis of U.S. EPA data and IMPLAN regional industry input-output models.

**Figure 42: Total Point Source Releases to Ground per Year by County, 2001-2022**

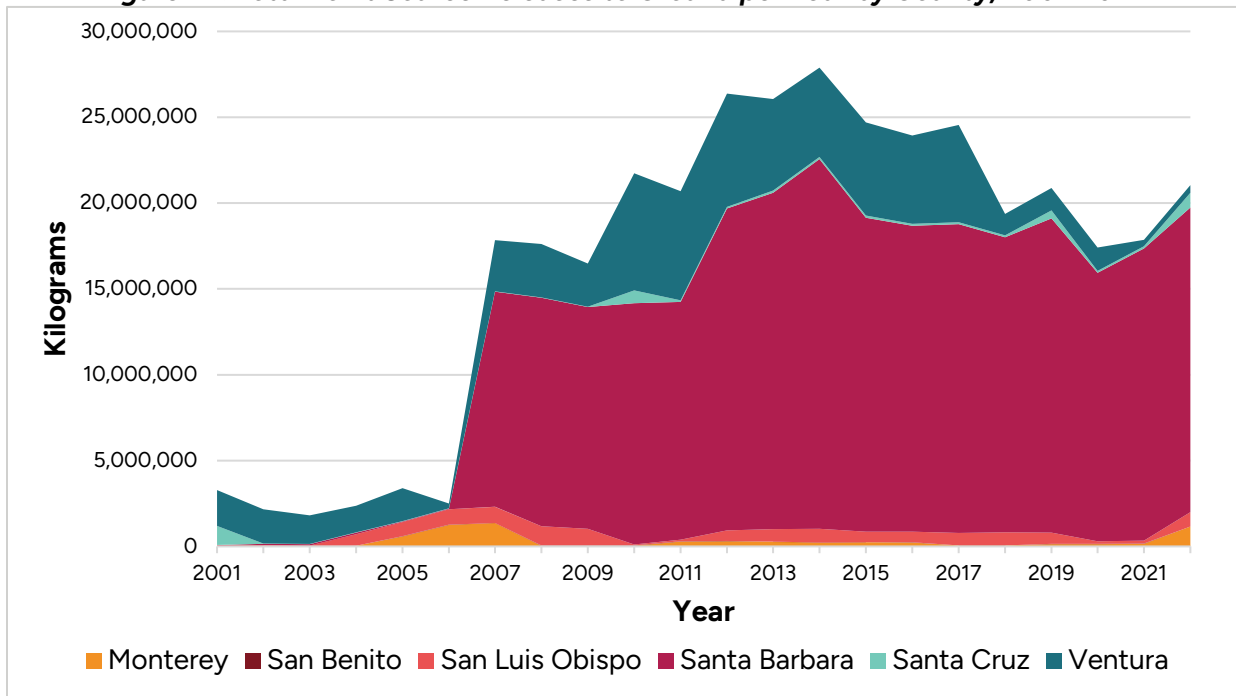


Figure 42: Total point source releases to ground from industrial uses in kilograms per year Central Coast County, 2001-2022. Source: Analysis of U.S. EPA data and IMPLAN regional industry input-output models.



Lastly, industry-produced commercial hazardous waste, such as waste oil, sodium azide, 2-butanone, and dried paint, has also increased consistently in the region over this period across counties (see Figure 43). As of 2022, manufacturing and agriculture drove this output across counties (see Figure 44).<sup>87</sup>

**Figure 43: Total Commercial Hazardous Waste from Industrial Sources by County, 2001-2022**

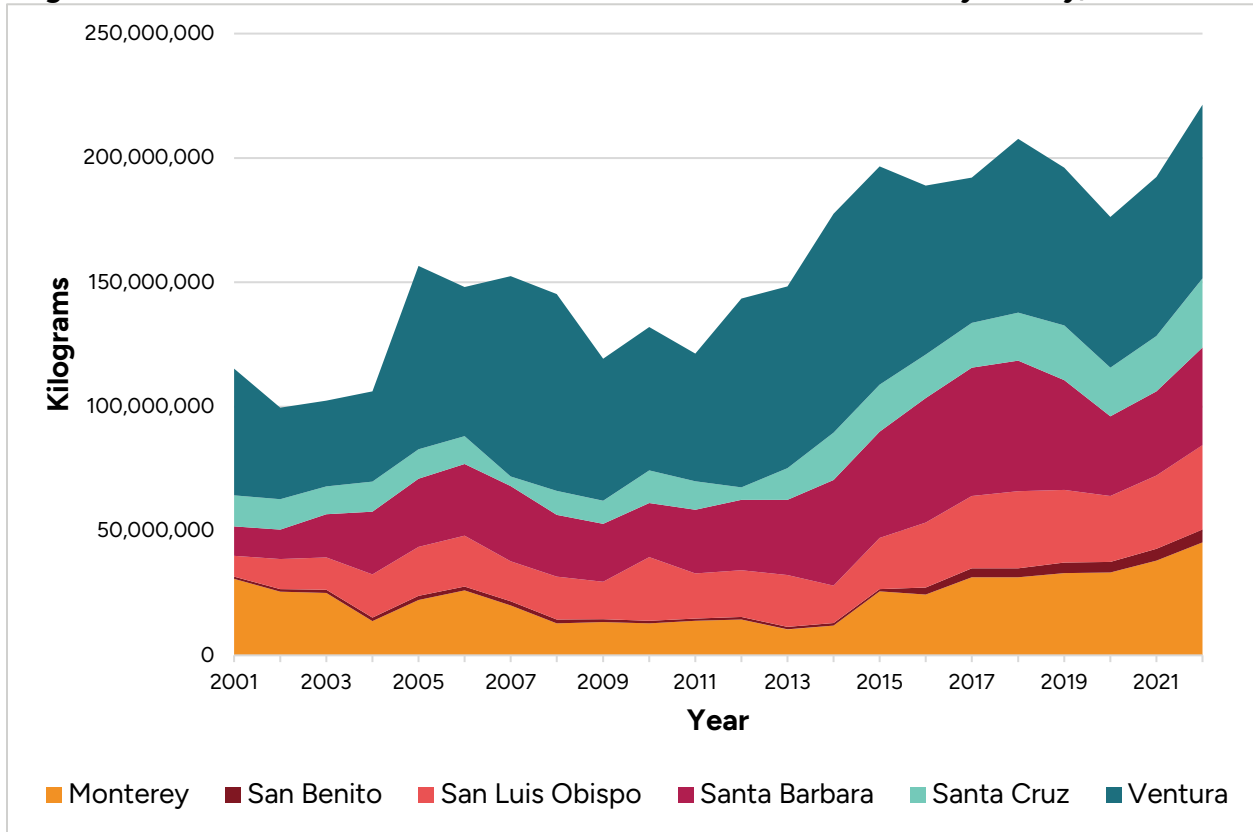


Figure 43: Total commercial hazardous waste from industrial sources as defined by EPA under the Resource Conservation and Recovery Act (e.g. waste oil, Sodium Azide, 2-Butanone, dried paint) in kilograms by Central Coast County, 2001-2022. Source: Analysis of U.S. EPA data and IMPLAN regional industry input-output models.

<sup>87</sup> Analysis of U.S. EPA data and IMPLAN regional industry input-output models.

**Figure 44: Commercial Hazardous Waste by Industrial Source by County, 2022**

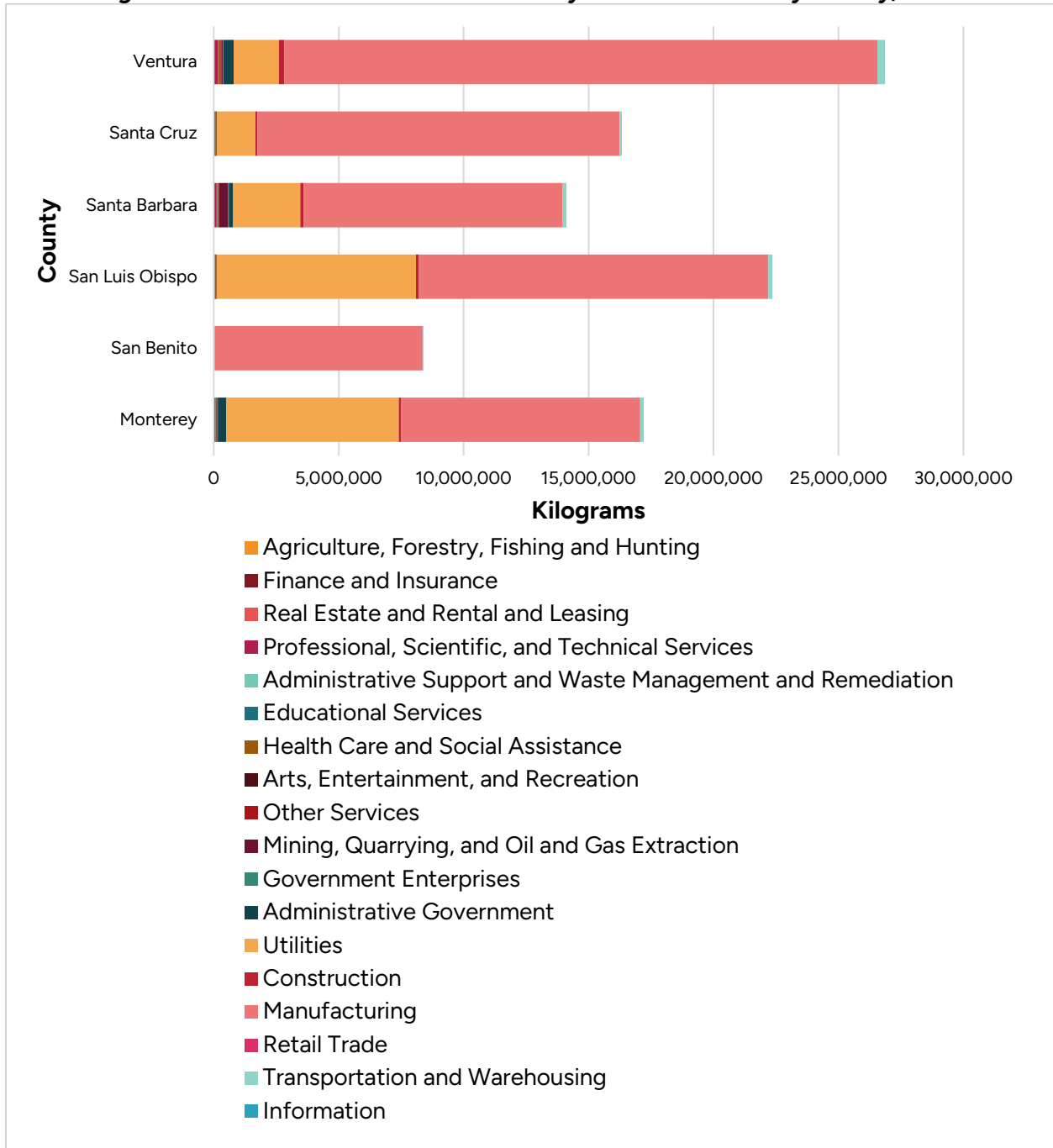


Figure 44: Commercial hazardous waste NAICS sector uses as defined by EPA under the Resource Conservation and Recovery Act (e.g., waste oil, Sodium Azide, 2-Butanone, dried paint) in kilograms by Central Coast County, 2022 Source: Analysis of U.S. EPA data and IMPLAN regional industry input-output models..

— Areas for Further Exploration —

- Analysis of regional Superfund sites.
- Analysis of the degradation of the natural environment in the region and potential disparities indicated.
- Analysis of county and locality Climate Resilience and Adaptation Plans and Climate Action Plans.
- Analysis of air quality, presence of hyperlocal air quality monitoring, and related disparities could be explored further.
- Analysis of cumulative burdens on disinvested communities.

## 5. Disparities underlie above-average aggregate public health outcomes.

The six counties that make up California’s Central Coast region tend to have above-average health outcomes, although difficulties accessing quality health care, environmental hazards, and other factors result in disparities where those outcomes are not experienced uniformly.

Ventura County and Santa Cruz County are ranked the eighth and ninth healthiest counties in the state of California, respectively, according to the University of Wisconsin Population Health Institute County Health Rankings, a national model that weighs a complex array of health behaviors, clinical care access, social and environmental factors, and physical environment that lead to differential outcomes in length and quality of life.<sup>88</sup> Monterey, San Benito, San Luis Obispo, and Santa Barbara rank among the top 40 percent of California counties. All six counties meet or exceed the average State life expectancy of 81 years. Rates of premature death fall beneath the State average in all counties, although San Luis Obispo, San Benito, and Santa Cruz all met or exceeded the State for at least one year over the past decade.

Rates of chronic conditions, such as cancer, diabetes, and high-blood pressure are relatively consistent, with some variation. For instance, the counties of Ventura, San Luis Obispo, and Monterey see the highest prevalence of high blood pressure, while the counties of Monterey, San Benito, Santa Barbara, and Ventura see the highest prevalence of diabetes.<sup>89</sup> All Central

### Mental Health Impacts of the Central Coast’s Economy

Living from paycheck-to-paycheck and struggling to make ends meet takes a toll on Central Coast residents’ mental health. Persistent language discrimination or losing a job, for instance, may trigger depression and an overwhelming sense of hopelessness. Long commutes and work hours might strain personal relationships. Across the region, community members reported lacking access to mental health care and needing to wait long periods before they are able to be seen by a mental health professional.

<sup>88</sup> For context on the University of Wisconsin methodology, see University of Wisconsin Population Health Institute, “County Health Rankings Model,” <https://www.countyhealthrankings.org/explore-health-rankings/county-health-rankings-model>.

<sup>89</sup> Centers for Disease Control and Prevention, National Center for Chronic Disease Prevention and Health Promotion, Division of Population Health. PLACES Data, 2022, <https://www.cdc.gov/PLACES>.

Coast counties have a higher prevalence of cancer (excluding skin cancer) and depression than the State average. Multiple counties also (in some cases slightly) exceed the state average in prevalence of high blood pressure, diabetes, asthma, and chronic kidney disease (see Figure 45).

Impacts of climate change, such as wildfires and drought, have been shown to exacerbate several of these conditions. In addition, common medications for several conditions (e.g., antidepressants, blood pressure drugs) have been shown to make individuals more vulnerable to heat.<sup>90</sup> This suggests that these chronic conditions may become more prevalent and their treatment more complicated as climate change continues.

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<sup>90</sup> U.S. Environmental Protection Agency, "Climate Change and the Health of People with Chronic Medical Conditions," accessed December 17, 2023, <https://www.epa.gov/climateimpacts/climate-change-and-health-people-chronic-medical-conditions>.

**Figure 45: Prevalence of Select Chronic Conditions in the Central Coast Region**

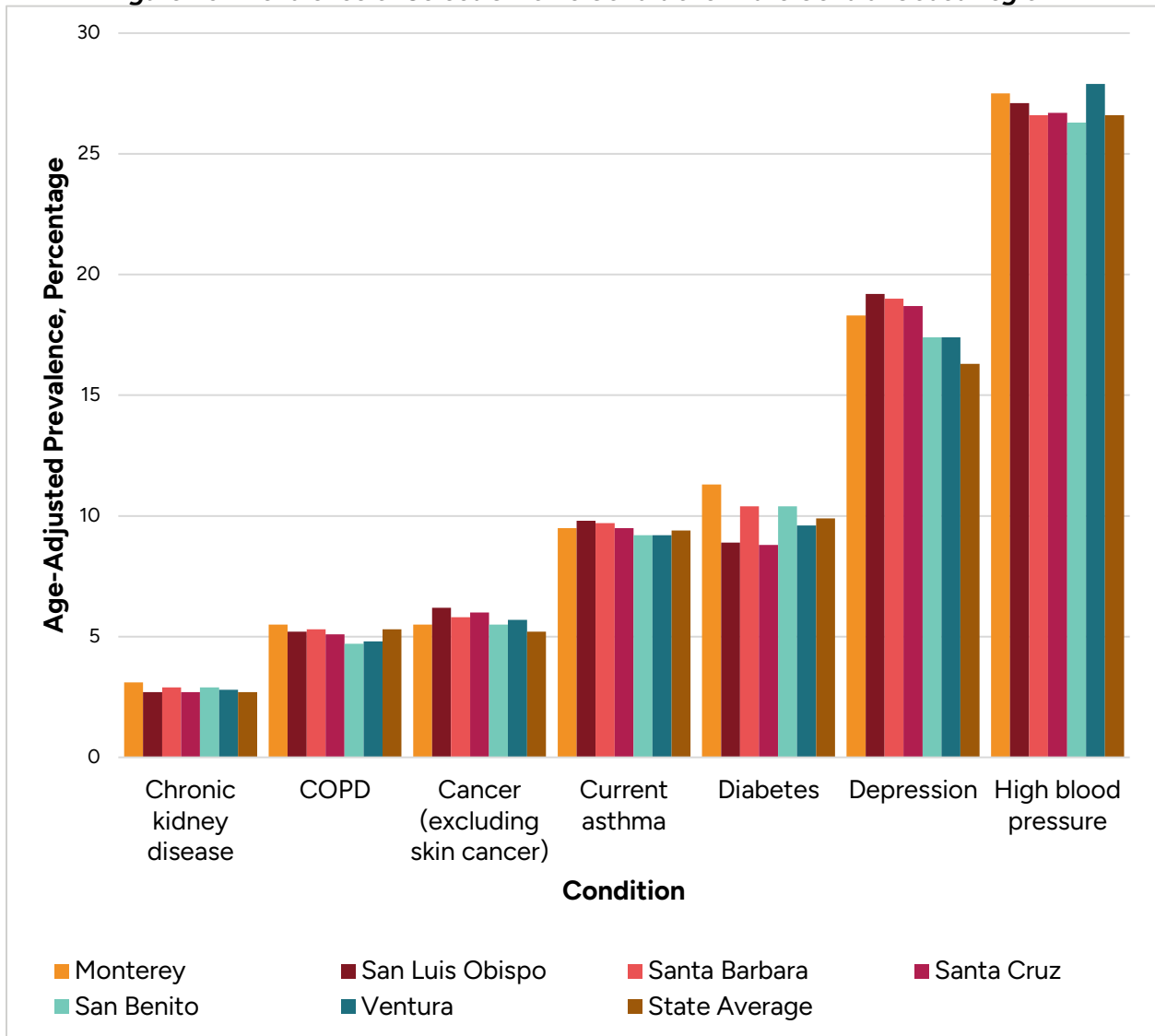


Figure 45: Prevalence of select chronic conditions in Central Coast Counties, 2021. Source: Centers for Disease Control and Prevention PLACES.

In addition, these top-line figures conceal other variation between geographies and across demographic groups. Health indicators and outcomes in Monterey County often trail other Central Coast counties: Monterey has the highest percentage of adults reporting fair or poor health among the Central Coast (also exceeding the State average), the highest rate of physical inactivity, significantly elevated rates of sexually transmitted infections and teen births compared to the rest of the region, and lower rates of mammography screening.<sup>91</sup> This may be attributable to Monterey's significant farmworker population, which faces established challenges accessing culturally-responsive care.<sup>92</sup> Santa Cruz, San Luis Obispo, and San Benito all have higher than state-average rates of opioid-related overdose deaths, while Monterey and Santa Barbara have two of the lowest rates in the state.<sup>93</sup>

Paralleling state and national trends and reflecting

socioeconomic disparities experienced by disinvested populations, Hispanic/Latino/x/e and Black residents tend to experience poorer health outcomes. Though a relatively small portion of the population within the Central Coast, Black residents in many counties see higher rates of years of potential life lost (a measure of premature mortality) than other groups and their county of residence as a whole (see Figure 46). Monterey County has a high teen birth date with Hispanic/Latino/x/e residents having 35 teen births per 1,000 females aged 15-19,

**“A worker with diabetes and was sick and could not return to work because he was hospitalized. When he returned to work, he no longer had a job. He was replaced with another employee. He lost housing and became homeless. His condition has worsened and his family is now homeless. His kids are being affected. His older son was supposed to graduate in 2023 and was not able to because he was behind and would not be graduating due to having to start work and working late hours. The money his son makes is not enough to get enough food for the whole family. Sometimes his wife and him go without eating so their children would have enough. It is impossible to get housing. Housing is not easily accessible, and prices are outrageous.”**

Listening Session in Monterey focused on the African American community



<sup>91</sup> University of Wisconsin Population Health Institute, “County Health Rankings,” <https://www.countyhealthrankings.org/>. Mammography screening is measured as percentage of female Medicare enrollees ages 65-74 that received an annual mammography screening. STI rates are based on the number of newly diagnosed chlamydia cases per 100,000 population.

<sup>92</sup> See, for instance, Melissa Gomez, “California imports doctors from Mexico to fill gaping holes in farmworker healthcare,” Los Angeles Times, Nov 8, 2023, <https://www.latimes.com/california/story/2023-11-08/california-imports-doctors-from-mexico-farmworker-health-care>.

<sup>93</sup> California Overdose Surveillance Dashboard, California Department of Public Health, <https://skylab.cdph.ca.gov/ODdash/?tab=CA>.

compared to 11 for Black residents, 6 for white residents, and 2 for Asians.<sup>94</sup> Monterey's low rate of mammography screening is similarly divided along racial/ethnic lines, with 21 percent of American Indian/Alaska Native, 28 percent of Asian, 27 percent of Black, 22 percent of Hispanic/Latino/x/e, and 33 percent of white women receiving screenings.<sup>95</sup>

**Figure 46: Central Coast Years of Potential Life Lost by County and Race**

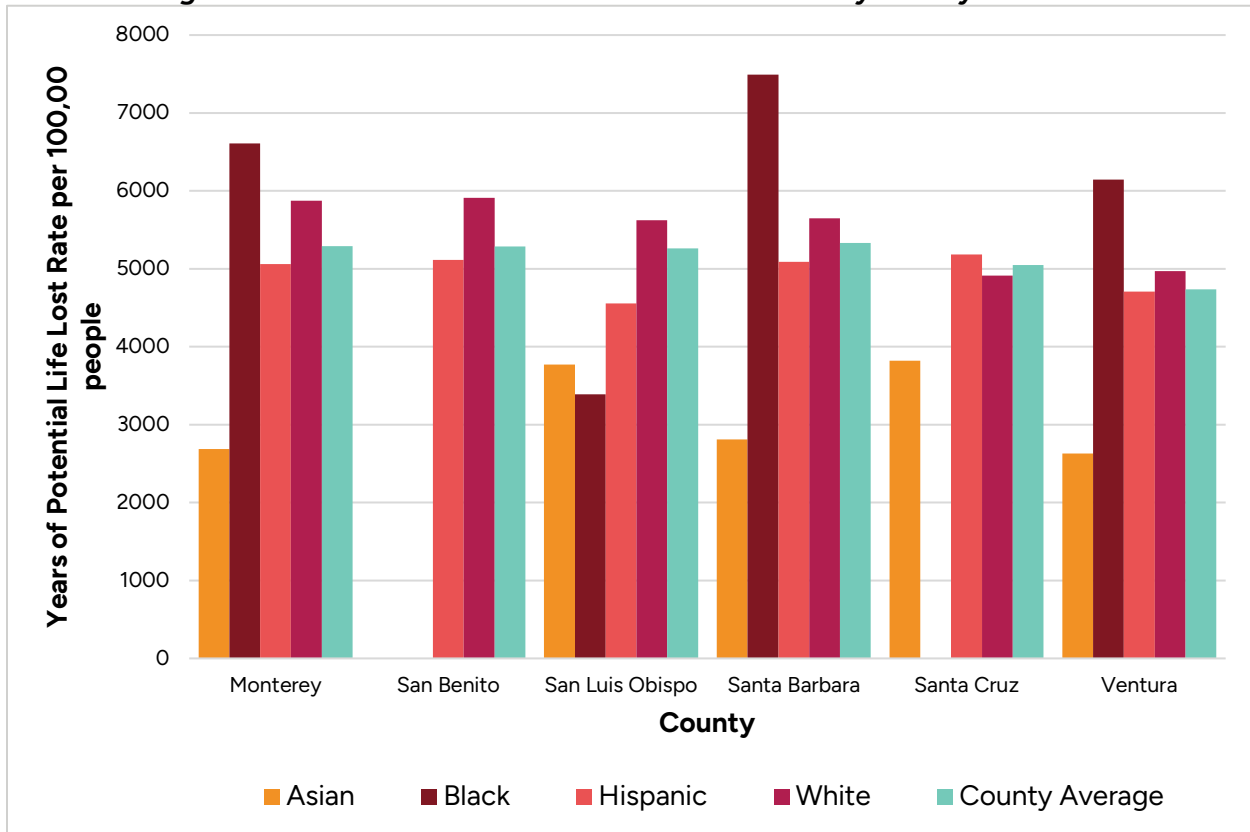


Figure 46: Central Coast premature death rate by county and race. Races not shown are not at sufficient scale. Source: University of Wisconsin Population Health Institute County Health Rankings.

Access to care also varies in the region, suggesting disparities in availability of health services. Monterey and San Benito both have significantly fewer primary care physicians than the state average; Monterey has 1,520 residents per physician and San Benito (a largely rural area with significantly lower population than other Central Coast counties) has 3,370 residents per physician, versus the state average of 1,230 residents per physician.<sup>96</sup> Conversely, Santa Cruz has one primary care physician for every 960 residents.<sup>97</sup> Monterey (11 percent) and Santa Barbara (12 percent) also have slightly above average percentages of uninsured residents,

<sup>94</sup> University of Wisconsin Population Health Institute, "County Health Rankings."

<sup>95</sup> University of Wisconsin Population Health Institute, "County Health Rankings."

<sup>96</sup> University of Wisconsin Population Health Institute, "County Health Rankings."

<sup>97</sup> University of Wisconsin Population Health Institute, "County Health Rankings."

compared to the state average of 8 percent.<sup>98</sup> Monterey County, in particular, also experiences elevated health care prices, including for hospital care.<sup>99</sup>

As discussed in the previous section, environmental burdens associated with climate change – such as rising heat and wildfires – present sizable challenges for public health in the region. Outdoor farmworkers are particularly susceptible to, but do not exclusively face, these risks. Moreover, for example, a significant number of the households in the region do not have air conditioning, which will exacerbate the impact of rising temperatures. In all six counties, the percentage of households without air conditioning is higher than the State average, and in all but Ventura County, it is above 60 percent. In Monterey and Santa Cruz, a vast majority of households – 85.91 percent and 88.03 percent, respectively – do not currently have air conditioning (see Figure 47).<sup>100</sup> This indicator is illustrative of the investments that will need to be made to improve the region’s resilience to climate instability, in order to ensure ongoing public health.

**Figure 47: Central Coast Households Without Air Conditioning**

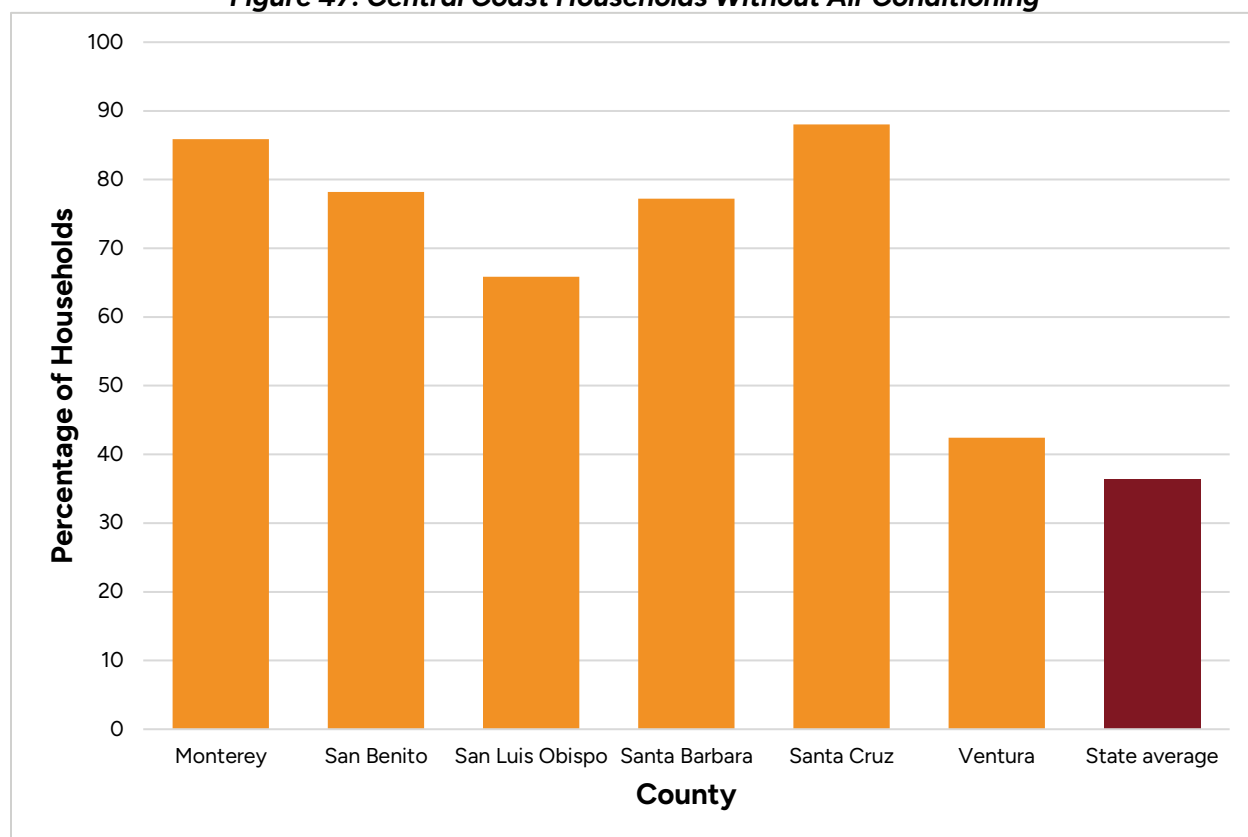


Figure 47: Percentage of households without air conditioning. Source: *Climate Change & Health Vulnerability Indicators for California*, CalBRACE, California Department of Public Health, Climate Change and Health Equity Section.

<sup>98</sup> University of Wisconsin Population Health Institute, “County Health Rankings.”

<sup>99</sup> Laurel Lucia, “Why are health care prices so high for workers in Monterey County?” UC Berkeley Labor Center, September 2023, <https://laborcenter.berkeley.edu/why-are-health-care-prices-so-high-for-workers-in-monterey-county/>.

<sup>100</sup> Climate Change & Health Vulnerability Indicators for California, <https://skylab.cdph.ca.gov/CCHV1z/>.



— Challenges and Limitations of this Section —

- Certain data sources do not provide disaggregated public health information by race/ethnicity and other factors, limiting ability to examine disparities.
- The U.S. Census Bureau does not include data for each county on educational attainment, inhibiting the capability to obtain a full picture of the Central Coast.
- Reviewers also suggested deeper exploration of numerous topics, including mental health, substance abuse (disaggregated by socioeconomic status), prevalence of violent crime (including gun violence), automobile accidents, child nutrition, and food deserts.
- Analysis of air quality, presence of hyperlocal air quality monitoring, and related disparities could be explored further.
- Evaluating data on pre-natal, maternal health, and other women’s health topics by race may uncover additional regional health insights and disparities to be addressed.
- Further exploration of data around other condition, illnesses, and health-influencing lifestyle choices (e.g., obesity, exercise, smoking) may enhance this analysis.

# Stakeholder Mapping

— Goals of this Section —

- Provide a snapshot of the stakeholders who have been active to-date in the California Jobs First planning process in the Central Coast Region. Additional insights are provided to understand these stakeholders on factors of influence and/or the potential to benefit from creating a more sustainable and equitable economy in the Central Coast Region.
- Understand the intersection of disinvested communities and stakeholders' locations, the varying levels of awareness stakeholders have of Uplift, and the ecosystem that exists in the region.

— Top-Level Themes —

- There are diverse types of actively engaged stakeholders throughout the Central Coast, however, there are still gaps. These stakeholder mapping tools are meant to assist Uplift in identifying and reaching out to entities that might not be represented currently, especially those who can benefit from the implementation of the California Jobs First program .

## Stakeholder Mapping

Uplift has mapped 229 actively engaged stakeholders<sup>101</sup> who encompass all the named California Jobs First constituencies, including: Labor Organizations, Employers, Businesses and Business Associations, Grassroots and Community-Based Organizations, Government Agencies, Economic Development Agencies, Philanthropic Organizations, Education and Training Providers, Workforce Entities, Environmental Justice Organizations, Workers Centers, Disinvested Communities and California Native American Tribes. The stakeholders listed and mapped in this section are represented by organizations who serve and/or represent these stakeholder groups.

Uplift has leveraged several methods to display the level of awareness, benefits to, and relevant categories that active stakeholders represent. These stakeholder mapping outputs create a clearer understanding of the region's current state of disinvested communities and actively engaged stakeholders to inform strategies, upcoming funding, and project opportunities. Additionally, Uplift will leverage the stakeholder mapping data and visualizations to better understand where there are gaps in resources and representation in the Central Coast Region.

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<sup>101</sup> Uplift defines actively engaged stakeholders as entities that have been engaged with Uplift in one or more of the following ways as of November 29, 2023: signed a letter of support in July 2022, signed a letter of support in May 2023, applied to Uplift's September 2023 Community Based Engagement Services Contract, received Uplift's September 2023 Community Based Engagement Services Contract, met with Uplift, completed an interview with the Brookings Research Team, representation on the Vision and/or Steering Committees, and/or hosted a Community Engagement Session, such as a Listening Session or a Community Convening. The full list of actively engaged stakeholders can be found in Annex 4.

The stakeholder mapping insights provided in this report represents a current snapshot of the Central Coast, which may be updated as this process evolves through the final strategy development. Along with the whole report, the stakeholder mapping section is driven by Uplift's North Star, the convergence of Economic Opportunity, Equity, and Sustainability.

## The Geographic Information Systems (GIS) Dashboard: Stakeholders and Disinvested Communities

Uplift created the [Uplift Central Coast Geographic Information Systems \(GIS\) Dashboard](#), as shown in Figure 48, which is an interactive

map built with ArcGIS software that can be accessed using the URL linked above.<sup>102</sup> The Uplift Central Coast GIS Dashboard overlays Disinvested Communities, Disadvantaged Communities<sup>103</sup>, High Poverty/High Unemployment Cities, Climate and Economic Justice Screening Tool tracts (CEJST CEQ)<sup>104</sup>, California Native American Ancestral Lands, 2020 Census Demographics (by tract or county), and the physical locations<sup>105</sup> of actively engaged stakeholders across the Central Coast. The Uplift Central Coast GIS Dashboard can be leveraged to understand how the location of actively engaged stakeholders correlates to Disinvested Communities. The dashboard provides a snapshot of the geographic areas where there are gaps in actively engaged stakeholders, aiding Uplift in planning where community engagements need to take place to integrate historically unheard voices.

### What does “stakeholder” mean?

Stakeholders captured in this report are people or groups who have an interest or concern in matters related to Uplift, California Jobs First, or the quality of life in the Central Coast Region. Uplift acknowledges that this term may reflect a power differential between groups and has a violent connotation for some tribes and tribal members. It also groups many parties into one term, not designating potential differences in their reasons for involvement or background. Stakeholder mapping is as requirement under the California Jobs First program. As such, Uplift provides additional information on how each stakeholder is involved in the planning process.

Source: Centers for Disease Control and Prevention. Preferred Terms for Select Population Groups & Communities. November 3, 2022. [https://www.cdc.gov/healthcommunication/Preferred\\_Terms.html](https://www.cdc.gov/healthcommunication/Preferred_Terms.html).

<sup>102</sup> Full Uplift Central Coast GIS Dashboard URL:

<https://experience.arcgis.com/experience/41e159230a35437cb6b066d1aac0c45f>

<sup>103</sup>The California Environmental Protection Agency (CalEPA) formally designated four categories of geographic areas as disadvantaged: 1.) Census tracts receiving the highest 25 percent of overall scores in CalEnviroScreen 4.0. 2.) Census tracts lacking overall scores in CalEnviroScreen 4.0 due to data gaps but receiving the highest 5 percent of CalEnviroScreen 4.0 cumulative pollution burden scores. 3.) Census tracts identified in the 2017 DAC designation as disadvantaged, regardless of their scores in CalEnviroScreen 4.0. 4.) Lands under the control of federally recognized Tribes. Source: California Environmental Protection Agency, Office of Environmental Health Hazard Assessment. "CalEnviroScreen - SB 535." Accessed November 21, 2023. <https://oehha.ca.gov/calenviroscreen/sb535>.

<sup>104</sup>United States government “uses datasets that are indicators of burdens in eight categories: climate change, energy, health, housing, legacy pollution, transportation, water and wastewater, and workforce development” to create the Climate and Economic Justice Screening Tool (CEJST). Source: “About.” Climate and Economic Justice Screening Tool. Accessed November 21, 2023. <https://screeningtool.geoplatform.gov/en/about>.

<sup>105</sup> Please note that for the purpose of mapping geographic location, stakeholder's location is listed as their office. Physical office location does not account for the footprint of the areas served beyond office address.

**Figure 48: The Uplift Central Coast GIS Dashboard**

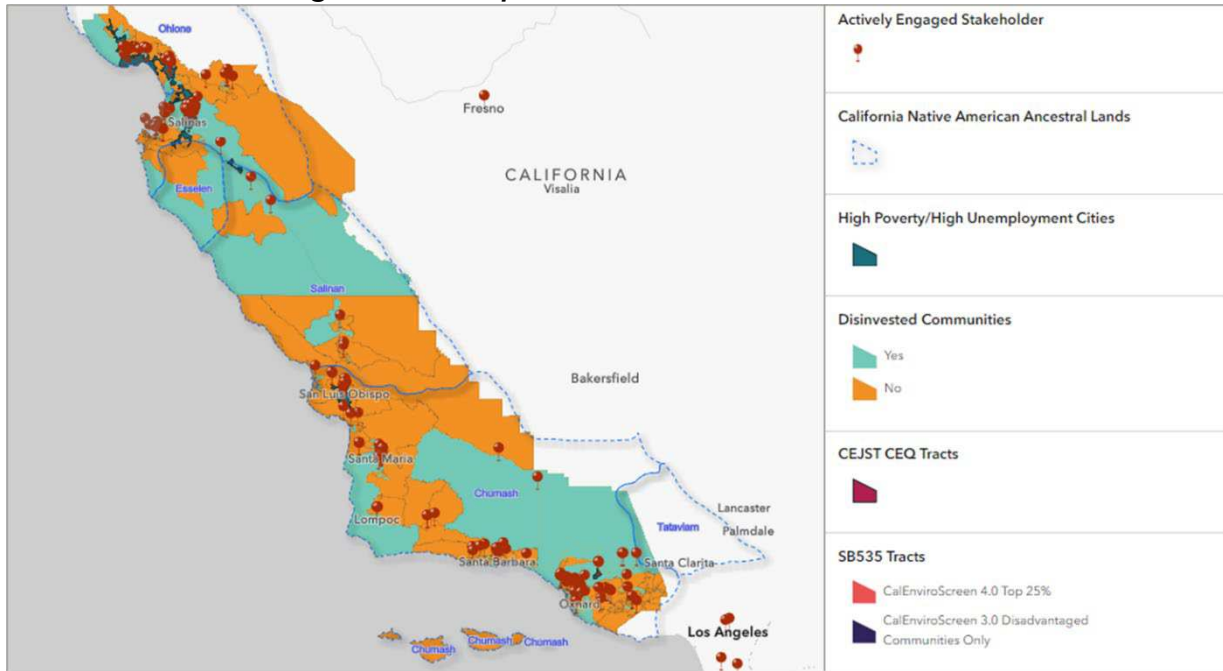


Figure 48: A Snapshot of the interactive Uplift Central Coast GIS Dashboard.

The Central Coast region has geographically large disinvested communities across the North and South of the region, with several urbanized areas with populations that experience high poverty and high unemployment in Monterey, San Luis Obispo, Santa Cruz, and Ventura Counties. Based on the Uplift Central Coast GIS Dashboard, engaged stakeholders are less prevalent in the inland sections of the region and are more heavily concentrated in the more densely populated northern and southern areas, based on main address provided by each stakeholder. As shown in Figure 8 in the “Understanding the Central Coast” Section, as population increases per county the number of stakeholders engaged in the California Jobs First planning process in each county also increases, with the exception of Ventura County.

**Figure 49: The Stakeholder Mujeres en Acción’s Location**

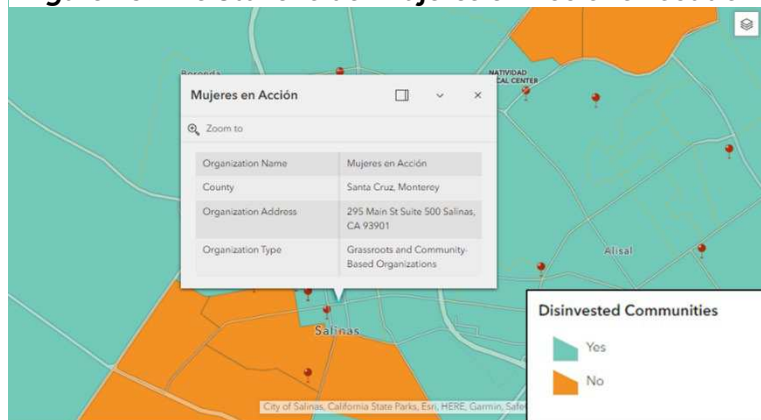


Figure 49: Mujeres en Acción is an example of an organization that is located in a disinvested community that Uplift has engaged with.

Uplift leveraged the created GIS dashboard to understand which stakeholders are located within disinvested communities, enabling Uplift to prioritize where they should continue organizing Listening Sessions, Community Convenings, and Roundtables. This analysis has helped Uplift better understand the issues these communities face to inform the strategy.

Figure 49 highlights the organization Mujeres en Acción, which is located in a disinvested community. Mujeres en Acción is a

peer-to-peer support and leadership development program that seeks to unlock the full

potential of low-income, primarily monolingual (Spanish or Mixtec), women.<sup>106</sup> Mujeres en Acción has engaged with Uplift in several ways, including signing a letter of support in July of 2022, and hosting a Listening Session. In September 2023, Uplift awarded Mujeres en Acción a Community Based Engagement Services Contract<sup>107</sup> to continue hosting Listening Sessions and engaging their community members with during the Uplift planning process.

**Figure 50: The Stakeholder, Monterey Bay Central Labor Council's Location**



Figure 50: Monterey Bay Central Labor Council is located in a high poverty/high unemployment city.

The Uplift Central Coast GIS Dashboard also indicates populations that experience high poverty and high unemployment. As shown in Figure 50, Uplift is engaged with the Monterey Bay Central Labor Council, which is in a high poverty, high unemployment area in Salinas. The Monterey Bay Central Labor Council is dedicated to promoting equity and fairness in the workplace and serves as a coalition of the Labor community in Monterey and Santa Cruz Counties, striving to create a more inclusive and just society for

working families.<sup>108</sup> Uplift awarded the Monterey Bay Central Labor Council a Community Based Engagement Services Contract in September 2023 to advance Uplift's continued engagement with Labor stakeholders to help inform Central Coast economic development strategies.

Mujeres en Acción, the Monterey Bay Central Labor Council, and other stakeholders located in disinvested areas are integrated within Uplift's California Jobs First Regional Collaborative. Members from these organizations serve on both the Vision and Steering Committees – critical components of Uplift's community-led governance approach. This deep engagement establishes a vital link between Uplift, Labor organizations, and low-income Spanish or Mixtec-speaking women.

In alignment with Uplift's community engagement<sup>109</sup> efforts, Uplift strives to continue connecting with disinvested community stakeholders. Uplift's goal is for all members of the community to have the opportunity to share their experiences, thereby guiding implementation phase resource allocation and Catalyst Funding. Uplift leverages resources such as an Inclusivity Fund<sup>110</sup> to cultivate relationships and offer marginalized community members a platform to share their perspectives while removing barriers to participation, incentivizing participation, and respecting the two-way engagement framework. The Inclusivity

<sup>106</sup> Mujeres en Acción." Mujeres en Acción. Accessed November 29, 2023. <https://mujeresenaccion831.org/home/who-we-are/>.

<sup>107</sup> See the "Introduction" section for more information on the community engagement services contract.

<sup>108</sup> Monterey Bay Central Labor Council, "About MBCLC," Accessed November 29, 2023, <https://mbclc.org/about-us>.

<sup>109</sup> See the "Introduction" section and Annex 5 for more information on Uplift's efforts on community engagement.

<sup>110</sup> See the "Introduction" section for more information on the Inclusivity Fund.

Fund initiative aims to alleviate financial constraints associated with participating in community engagements, both for individuals and for organizations, fostering more inclusive involvement.

As the planning proceeds, Uplift aims to continue to employ innovative and inclusive approaches to bring all impacted stakeholders into the co-creation process.

### The Stakeholder Awareness Journey and Benefit Matrix

Uplift measured the awareness<sup>111</sup> level of each actively engaged stakeholder by evaluating stakeholders' interactions with Uplift and gauging the scale of potential benefits<sup>112</sup> each stakeholder group could derive from the implementation of California Jobs First. This assessment led to the development of a Stakeholder Awareness Journey (shown in Figure 51) and a Stakeholder Benefit Matrix (shown in Figure 55). Uplift leveraged these tools to evaluate the current level of engagement and understanding among actively involved stakeholders regarding both Uplift and California Jobs First. The Stakeholder Benefit Matrix informs Uplift's understanding of each stakeholder's potential contribution to strategy development and future implementation.

The Stakeholder Awareness Journey, shown in Figure 51 organizes the number of stakeholders by the level of awareness they have of Uplift and California Jobs First using categories of deepening engagement starting at Aware, moving to Supportive, then Involved, and ending with Leading. This visual offers a concise representation of the awareness level among stakeholders on the Central Coast about the California Jobs First program and Uplift's role.

**Figure 51: The Journey of Stakeholders' Awareness of Uplift and California Jobs First**

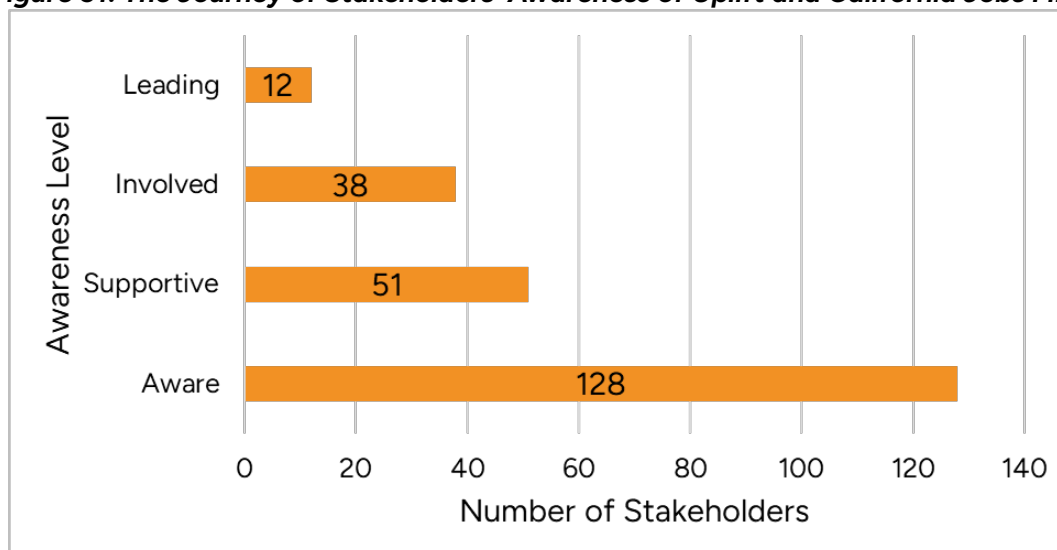


Figure 51: The Stakeholder Awareness Journey indicates the various levels of awareness of Uplift and California Jobs First and number of actively engaged stakeholders at each level.

<sup>111</sup> Per Uplift's response to the State's feedback of the Draft Regional Plan Part I submitted in August, Uplift will measure stakeholders' level of awareness of Uplift and level of benefit from a successful implementation. Uplift does not plan to explicitly use the verbiage "power dynamics" or "power mapping" to avoid disenfranchising stakeholders.

<sup>112</sup> See Annex 4 for full list of benefits.



The level of awareness was measured using several factors, and actively engaged stakeholders were grouped into one of the following categories listed in order from most aware to least aware:

**Leading:** Stakeholders in this category are deeply aware of Uplift and California Jobs First. Uplift will lean on these stakeholders to collaborate with those who are in the more nascent stages of awareness.

**Involved:** Stakeholders in this category are aware of Uplift and California Jobs First. Similar to the “Leading” stakeholders, Uplift might engage with these stakeholders to collaborate with those who are in the more nascent stages of awareness.

**Supportive:** Stakeholders in this category might not be familiar with Uplift and/or California Jobs First. Uplift will work to make sure these organizations have opportunities to gain a better understanding of Uplift, by convening with these stakeholders and/or connecting them with stakeholders who are in more mature stages of awareness.

**Aware:** Stakeholders in this category are aware of Uplift and/or California Jobs First at some point since the beginning of the planning process, but their engagement with Uplift might have paused. Uplift will work to reintegrate these stakeholders with those who have a greater understanding of Uplift and California Jobs First.

Uplift set parameters to evaluate engagement categories systematically, creating a methodical and standard procedure in measuring the awareness of each stakeholder. Figure 52 provides an overview of each type of engagement activity and the “point value” that correlates to this activity. Each stakeholder is connected to Uplift and/or California Jobs First in one or more of the ways outlined in Figure 52. Higher point values denote activities that required multiple touchpoints and/or ongoing collaboration, such as the hosting of a community listening sessions. Lower point values indicate a lower engagement activity like a Letter of Support.

**Figure 52: The Stakeholder Engagement Type Scoring**

Stakeholder Engagement Type	Value <i>(1 being the lowest and 4 being the highest)</i>
July 2022 Letter of Support	1
May 2023 Letter of Support	1
September 2023 CBO Grant Applicant	1
Organization met with Uplift	2
Uplift presented to stakeholder	2
Organization completed interview with Brookings	2
September 2023 CBO Grant Recipient	3
Committee Member Representation	4
Community Engagement Host	4

*Figure 52: The scoring of each engagement type for overall stakeholder awareness measurement*

After assigning the above numerical scale to each engagement type, the values are combined to assign each stakeholder a cumulative score, used as a metric to gauge awareness level. For example, Black Leaders and Allies Collaborative (BLAAC) is engaged with Uplift in several ways, including having representation on the Vision Committee, hosting a Listening Session with Uplift and members of their community, meeting with Uplift to identify partnership opportunities, and applying for the Community Based Engagement Services Contract in



September of 2023. These engagements accumulate to a total score<sup>113</sup> of 11, positioning BLAAC within the “Leading” category of awareness.

The Stakeholder Awareness Journey aligns with Uplift’s current state as a newer organization. As noted in the Highlights of Uplift’s Timeline in Figure 53, Uplift received state funding and began work on the California Jobs First planning phase in February of 2023 with key members of the staff hired through March of 2023. The Vision Committee was activated in May of 2023 and the Steering Committees followed in June of 2023. Uplift recently rebranded and launched its updated website along with additional communications platforms in September of 2023. Uplift sends out a monthly newsletter to the public, offering additional avenues for community members to engage and participate, but it is expected that more stakeholders will move from lower levels to higher levels awareness as Uplift matures as an organization and the California Jobs First program moves through the planning phase into the implementation phase.

**Figure 53: Highlights of Uplift’s Timeline**

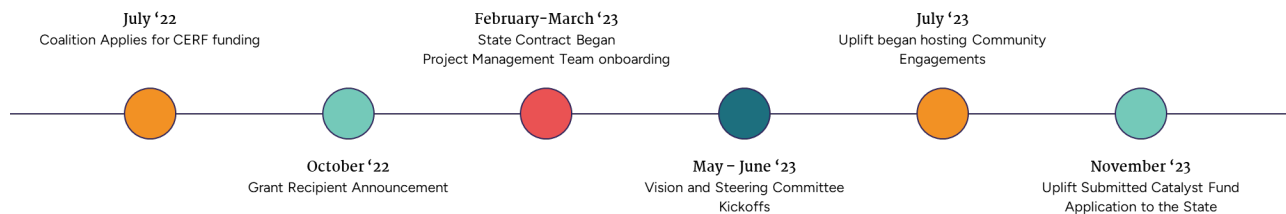


Figure 53: Uplift’s timeline from inception to today.

The Awareness Journey in Figure 51, displays the overall awareness, understanding, trust, connection and buy-in regional stakeholders have with Uplift and the Central Coast’s California Jobs First program. This visual provides a snapshot of how power to communicate is shared and the overall influence and convening power that Uplift has within the Central Coast Region. In line with Uplift’s North Star, this power is designed to be shared among stakeholders and Uplift will continue to lift up and center traditionally unheard voices through engagement strategies and throughout the planning process.

**The Stakeholder Benefit Matrix**, displayed in Figure 55, works in conjunction with the above Stakeholder Awareness Journey. The Stakeholder Benefit Matrix visualizes the varying levels of awareness and the potential to benefit from the program among Uplift’s engaged stakeholder groups. It assists Uplift in refining its engagement and outreach strategy, emphasizing interactions where awareness might be limited, but the potential benefit from the implementation of the plan may be substantial. This approach promotes a targeted and impactful engagement strategy across the region and its diverse stakeholders groups.

The horizontal axis of the Stakeholder Benefit Matrix represents the level of awareness groups have regarding Uplift and California Jobs First. Stakeholder groups positioned farther to the right indicate that organizations representing these groups have a higher awareness of Uplift and California Jobs First. The vertical axis illustrates the level of benefit that each stakeholder group would receive from the implementation of Uplift’s final economic development strategy. Groups placed higher on this axis would benefit more from the strategy’s implementation.

<sup>113</sup> The engagement type and total score of each organization is also listed in the full list of active stakeholders in Annex 4.

**Figure 54: Stakeholder Groups for Uplift Stakeholder Benefit Matrix**

Black, Indigenous, Latinx, and People of Color	Employees (Skilled-Workers, Blue Collar Workers, Entry Level Workers)
Low Income Individuals	Women
Small Business Owners	Older Adults
Youth, Young Adults, Students, and Parents	Large Employers
Farmworkers and Agricultural Communities	

Figure 54: List of stakeholder groups for Uplift's Stakeholder Benefit Matrix.

The stakeholder groups listed in Figure 54 were defined based on California Forward (CAFWD)'s CERF (now referred to as California Jobs First) Program Evaluation<sup>114</sup> document as well as feedback Uplift received from community engagements. Per CAFWD, there are essential inputs to the results framework metrics including "priority census tracts/zip codes for equitable community economic development and investment; underrepresented businesses/entrepreneurs; and underrepresented residents." Uplift also considered the state's definition of disinvested communities to help identify stakeholder groups. Lastly, through hosting Listening Sessions, Uplift directly engaged with residents of the Central Coast to identify the perceived high need communities. During these sessions, individuals shared their firsthand experiences and the challenges they face living and attempting to thrive in the Central Coast Region. Uplift recognizes that people might identify as a member of more than one stakeholder group and that individuals have unique and multifaceted experiences that extend far past the label of a single group.

The Stakeholder Benefit Matrix in Figure 55 combines the stakeholder groups identified above and aims to intuit an understanding of the impact of the California Jobs First program on each. The horizontal axis of the Stakeholder Benefit Matrix represents the level of awareness groups have regarding Uplift and California Jobs First. Stakeholder groups positioned farther to the right indicate that organizations representing these groups have a higher awareness of Uplift and California Jobs First while those positioned farther to the left have a lower awareness. The vertical axis illustrates the scale of benefit that each stakeholder group could receive from the implementation of the program. Groups placed toward the top of this axis would benefit more from the strategy's implementation while groups placed near the bottom of this axis might not be as greatly impacted. The Stakeholder Benefit Matrix places an intentional focus on stakeholders who might be less aware and less engaged, but potentially highly impacted. Stakeholders who fall into that quadrant are a signal to Uplift for targeted outreach and engagement.

To evaluate the awareness that each of these stakeholder groups have of Uplift and California Jobs First (to accurately plot each group along the horizontal axis) Uplift reviewed the list of actively engaged stakeholders and the Awareness Journey, tracking which organizations served each stakeholder group, and where they fell in terms of awareness.

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<sup>114</sup> "Request for Information on CERF program Evaluation" PolicyLink California Forward (CAFWD), January 20, 2022, Accessed November 1, 2023, <https://cafwd.app.box.com/s/a9xj53ratpnaxwueznhdgjqhoyb7thi>.

**Figure 55: Uplift Stakeholder Benefit Matrix**

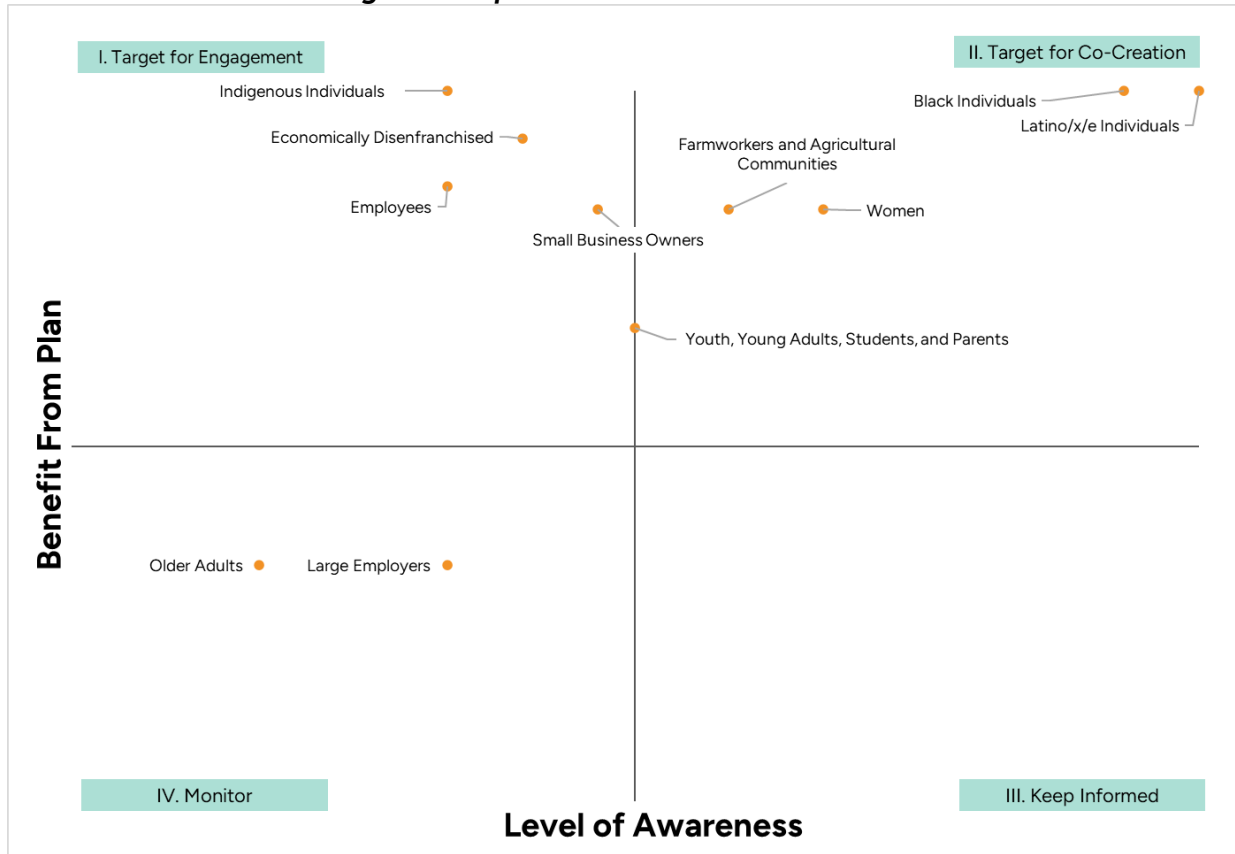


Figure 55: Uplift Stakeholder Benefit Matrix, the horizontal axis indicates awareness and the vertical axis indicates potential benefit from California Jobs First and Uplift.

The process to evaluate the benefits that each group would receive was measured using CAFWD defined metrics<sup>115</sup> which were further refined by the Uplift team.<sup>116</sup> These defined benefits align directly with California Jobs First priorities as well as Uplift’s North Star. Uplift analyzed the benefit types that could accrue to each stakeholder group<sup>117</sup>, then plot where each group landed on the vertical axis. Example benefits include increased quality jobs, increased jobs in the sustainability field, and increased new business formation disaggregated by owner gender/race/ethnicity.

The Stakeholder Benefit Matrix serves as a visual tool guiding Uplift on effective engagement strategies across diverse stakeholders. Crucially, it highlights stakeholder groups that stand to benefit from a successful strategy implementation but may lack awareness of Uplift and California Jobs First, identified in the quadrant labeled **Target for Engagement**. The matrix alerts Uplift by identifying these likely gaps in the current stakeholder list and suggests new types of organizations to connect with who are likely to be impacted by the program.

<sup>115</sup> See request for information (RFI) response here: <https://cafwd.app.box.com/s/a9xj53ratpnaxwuezdhdgjqhoyb7thi>.

<sup>116</sup> See Annex 4 for full list of benefit explanations.

<sup>117</sup> See Annex 4 for the full list of benefits that groups may incur.

The other quadrants include:

**Target for Co-Creation:** Indicates groups represented by organizations who are involved with Uplift and likely to benefit from the strategy. Uplift will continue to engage with these stakeholders. Similar to the stakeholders in the “Leading” and “Involved” categories in the Awareness Journey, Uplift will lean on these organizations to connect with those who are less engaged.

**Keep Informed:** Indicates groups represented by organizations who are highly aware of Uplift, but do not stand to gain significant benefits from the program implementation (currently there are no groups in this quadrant).

**Monitor:** Indicates groups who are not highly aware of Uplift, and likewise do not gain significant benefits from the strategy.

Uplift acknowledges several stakeholder groups are ripe for additional outreach and engagement. One such stakeholder group is Indigenous individuals.<sup>118</sup> One approach that Uplift may employ to further engage this stakeholder group is collaborating with the Healing and Reconciliation Institute, a recipient of an Uplift Community Engagement Services Contract. The Healing and Reconciliation Institute works toward a more resilient future by bridging Indigenous and non-Indigenous perspectives, addressing historical and ongoing harms by facilitating a framework for repair.<sup>119</sup> Through this contract, The Healing and Reconciliation Institute will engage with the Indigenous community to gather information about specific barriers and opportunities for local economic development. Additionally, Uplift will leverage committee and community members to find additional ways to engage and ideally co-create with Indigenous stakeholders.

Like other stakeholder mapping tools, the Stakeholder Benefit Matrix represents a snapshot of Uplift’s current state and is expected to evolve throughout each phase of the California Jobs First process.

## The California Jobs First Ecosystem: Stakeholder Representation and Resources

Understanding the network of ecosystem players across industries and stakeholder groups, the ways they are connected to each other and their geographic coverage is a tool to support Uplift’s understanding of the Central Coast Region’s stakeholder connectivity. Uplift and California Jobs First constituencies are reflected by sub-region of the Central Coast along with the network of services that the CBOs selected for the Community Engagement Grant provide. These tools serve a dual purpose: first, aiding in the identification of gaps in sectors and services. Second, to illustrate partnership networks and identify potential areas for collaboration.

Figure 56 shows the share of each of the California Jobs First constituencies engaged with Uplift across the Central Coast region. Figure 57 breaks this out by sub-region. Several areas

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<sup>118</sup> See “The California Jobs First Ecosystem: Stakeholder Representation and Resources” section regarding the number of stakeholders who represent the California Native American Tribes California Jobs First Constituency.

<sup>119</sup> Healing & Reconciliation Institute, “Who We Are,” Accessed November 20, 2023. <https://www.hricommunity.org/whoweare>.

lack substantial representation, which could be crucial for strategy and implementation. These groups include Labor Organizations, California Native American Tribes, and Workforce Entities. Additionally, Uplift will work to engage with directly business owners.<sup>120</sup> Uplift will continue to work with the Research, Vision, and Steering Committees to help identify additional stakeholders who align to these constituencies.

**Figure 56: Actively Engaged Stakeholders and the California Jobs First Constituency**

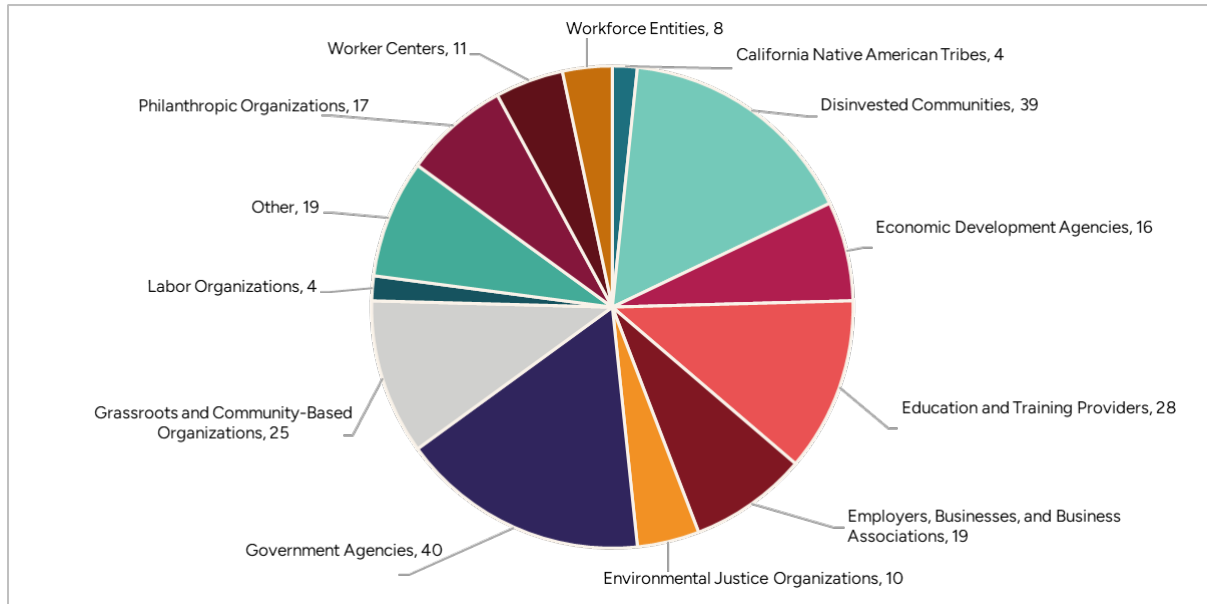


Figure 56: Share of stakeholders who are represented in each California Jobs First constituency.

**Figure 57: Actively Engaged Stakeholders and the California Jobs First Constituency by Sub-Region**

California Jobs First Constituency	Northern Sub-Region	Southern Sub-Region
California Native American Tribes	3	3
Disinvested Communities	20	19
Economic Development Agencies	9	9
Education and Training Providers	13	17
Employers, Businesses, and Business Associations	8	11
Environmental Justice Organizations	5	5
Government Agencies	16	25
Grassroots and Community-Based Organizations	10	15
Labor Organizations	1	3
Other	5	17
Philanthropic Organizations	8	11
Worker Centers	7	6
Workforce Entities	2	4

Figure 57: Share of stakeholders who are represented in each California Jobs First constituency by sub-region.

<sup>120</sup> See Annex 6 for the list of top employers on the Central Coast.

Uplift awarded seventeen Community Based Organizations (CBOs) Community Engagement Services contracts.<sup>121</sup> Among these, eight organizations are situated in the Northern Sub-Region, and nine are located in the Southern Sub-Region. Figure 58 and Figure 59 show a brief snapshot of the extensive network of services that these seventeen CBOs provide to the community.

**Figure 58: Services Provided by CBOs located in the Northern Sub-Region Who Received the Community Engagement Services Grant<sup>122</sup>**



Figure 58: List of services provides by CBOs located in the Northern Sub-Region.

<sup>121</sup> See the "Introduction" section for more information on the Community Engagement Grant and selected Community Based Organizations (CBOs).

<sup>122</sup> Services listed in Figures 58 and Figure 59 were provided by each CBO.



**Figure 59: Services Provided by CBOs located in the Southern Sub-Region Who Received the Community Engagement Services Grant**

<ul style="list-style-type: none"> <li>• Supports the county with grants and scholarships</li> </ul>	<ul style="list-style-type: none"> <li>• Provides sessions and workshops on child development and positive parenting strategies</li> <li>• Provides health education for the hard-to-reach Latinx community from trained Latinx community members</li> <li>• Provides services for people experiencing homelessness</li> </ul>	<ul style="list-style-type: none"> <li>• Provides support and social groups, youth services, in-house affirming therapy services</li> <li>• Provides cultural competency training</li> <li>• Meets with community stakeholders to enact policy changes</li> </ul>	<ul style="list-style-type: none"> <li>• Provides conservation education and gardening education, water advocacy and policy, and ancestral skill building</li> </ul>
<ul style="list-style-type: none"> <li>• Educates, provides emotional wellness, shares resources, promotes civic engagement, and empowers Latinx Community</li> </ul>	<ul style="list-style-type: none"> <li>• Provides financial literacy training and accountability</li> <li>• Provides entrepreneurship training, coaching, and funding</li> </ul>	<ul style="list-style-type: none"> <li>• Provides voter registration assistances, health and education resources</li> <li>• Assists people experiencing homeless</li> <li>• Fights for human rights and environmental climate justice</li> </ul>	<ul style="list-style-type: none"> <li>• Provides services for people experiencing homelessness</li> <li>• Provides basic needs (foods, clothing, etc.), housing information, and digital learning and tutoring</li> </ul>

Figure 59: List of services provided by CBOs in the Southern Sub-Region.

By integrating these CBOs into the Central Coast Region Stakeholder Ecosystem, not only does Uplift further engage with disinvested communities throughout the Central Coast, but joins the network of partnerships that these CBOs have built through deep collaboration on highly intersectional issues effecting their constituents and years of hard earned trust. For example, The Center for Family Strengthening along with several other entities such as, the Public Health Department, SLO Food Bank, San Luis Obispo County of Education, and San Luis Obispo Legal Assistance Foundation work together to provide health education for Latino/x/e community members. To foster an even more extensive and inclusive network, Uplift is facilitating connections among these seventeen CBOs, encouraging collaboration, and linking CBOs with other organizations that applied, but were not awarded the grant.

To highlight the Central Coast's stakeholder ecosystem and the unique relationships that exist across organizations, Uplift interviewed The National Association for the Advancement of Colored People (NAACP) Santa Maria / Lompoc Branch President Lawanda Lyons-Pruitt (see Image 2) on her community leadership. Lawanda has established a powerful network of

connections through her work with the NAACP and beyond. Lawanda has been a member of



Image 2: Photo of Lawanda Lyons-Pruitt

the **Santa Maria Police Department's Citizen Advisory Committee** since 2016, aiming not only to support the local police force, but also to ensure the Black, Indigenous, and People of Color communities have a voice. She is also the Legislative Chair of the **Democratic Club of Santa Maria Valley** and is on the Board of Directors for the **Santa Barbara County Action Network (SBCAN)** where she advocates for policies addressing climate change's disproportionate impact on marginalized communities.

Furthermore, Lawanda's dedication to mental health advocacy is reflected in her roles within the **Santa Barbara County Behavioral Wellness Cultural Competency & Diversity Team Committee** and the **National Alliance on Mental Illness (NAMI)**. Per Lawanda "NAMI intersects with our work in the NAACP in that we both share a commitment to ending health and racial health disparities, and our goal is not simply disease prevention, but to create an inclusive culture of healthy people and communities."

Additionally, Lawanda is involved in the **Women's March, League of Women Voters, Santa Maria-Bonita School District, Death Penalty Focus (DPF)** advocating against the death penalty, and the **Santa Barbara County Public Health Department's Health Equity Committee**. Through her monthly column "Black Lives; Black Voices" in the **Santa Maria Times**, she amplifies discussions around racial equity and reaches the broader community.

Lawanda Lyons-Pruitt is one example of the many individuals creating connections and fostering community on the Central Coast. Uplift looks forward to engaging with more community leaders like Lawanda to further connect with members of the community.

## Stakeholder Mapping Conclusion and Next Steps

As described in this section, Uplift developed several stakeholder mapping tools including the GIS Dashboard, Stakeholder Awareness Journey, Stakeholder Benefits Matrix, and Central Coast Stakeholder Ecosystem. These tools were designed to create an inclusive and actionable approach to stakeholder mapping. While the above section captures actively engaged stakeholders, the Steering and Vision Committees identified additional stakeholders<sup>123</sup> who are not currently engaged, but that Uplift has prioritized for outreach.

Uplift remains committed to collaborating with the California Jobs First Regional Collaborative to identify new stakeholders and create ways to engage with those who have a lower awareness of Uplift. By leveraging platforms like social media and the recently launched Uplift website, distributing flyers, participating in other community organizations' meetings and trainings, and working through the ecosystem to reach those in the collective network (though perhaps not in Uplift's direct network), Uplift aims to continue spreading awareness of

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<sup>123</sup> See Annex 4 for additional stakeholders identified by Uplift Committee members during the stakeholder mapping process.



California Jobs First. Stakeholder mapping helps Uplift maintain an inclusive and equitable approach to economic development, informing outreach strategies that provide the opportunity for all Central Coast voices to be heard.

Each of the visuals provided in this section represent a snapshot in time and will continue to mature and evolve. As Uplift works collaboratively to finish the planning phase of California Jobs First and move into the implementation phase, an increasing number of stakeholders will be engaged and ideally will move along the Awareness Journey toward Leading through the shared power framework. Uplift will continue to leverage the insights gained through the Uplift Central Coast GIS Dashboard, the Stakeholder Awareness Journey, the Stakeholder Benefit Matrix, combined with insights from the ecosystem, along with other tools to shape the final strategy, identify gaps, and maintain and advance an equitable and inclusive approach to community engagement and a co-created Central Coast future.

#### — Challenges and Limitations of this Section —

- The Central Coast covers a large geography. With limited staff and time, Uplift is limited in the external organizations it can feasibly engage.
- Uplift stakeholders do not exist within a vacuum. They interact with each other, creating a complex web of organizational relationships that Uplift did not have the resources to complete during this phase of work.
- Not all potential stakeholders are included in this analysis given the population of the Central Coast Region and the geographic dispersion. Uplift is committed to representation and will continue to champion the inclusion of all impacted stakeholders.

# Strengthening Industry to Create Opportunity

### — Goals of this Section —

- Explain the connections between industry and job growth and an equitable economy.
- Provide a comprehensive understanding of economic and industry trends and how they create challenges and opportunities for meeting Uplift’s goals.

### — Top-Level Themes —

- The Central Coast includes multiple distinct economic regions, pointing to the need for sub-regional approaches.
- The Central Coast’s economy is propelled by agriculture, hospitality, and local-serving sectors (such as healthcare, construction, food service, retail, and other parts of the economy that cater primarily to local consumers), alongside manufacturing and knowledge-intensive industries such as information and finance.
- While the Central Coast economy has continued to grow, indicators suggest that the region is not keeping pace with improvements to productivity (or value-added per job) and average earnings, impacting ability to support improvements to standards of living.
- Local-serving industries such as construction, healthcare, and hospitality fueled much of the region’s economic growth from 2012-2022; strengthening traded sectors is key to bolstering the region’s growth and prosperity engine.
- Only a quarter of jobs in the Central Coast currently qualify as quality jobs, due to the dominance of low-wage industries, such as agriculture and hospitality, and the region’s extraordinarily high costs of living. The region struggles to offer quality jobs to many residents, particularly those who are younger, less educated, and non-white.
- Entrepreneurship trends suggest uneven performance of young firms, but analysis needs to be supplemented with additional Roundtable engagement of small business owners.
- The region has world-class strengths in innovation, but these assets are balanced against challenges in other competitive drivers and enablers: talent access, infrastructure, and governance.

## Strengthening Industry to Create Opportunity

### Connecting Industry Growth and an Equitable Economy

Building more equitable growth is a complex undertaking that necessitates bridging multiple levels of action and demands leadership from many different individuals, organizations, and sectors. As described earlier in this report, many residents in the Central Coast face significant impediments to economic mobility and quality of life. Many residents struggle to make ends meet and cannot find affordable housing or childcare. Some face significant public health and environmental burdens. Specific factors such as language proficiency, disability, and citizenship status make it particularly difficult for some to succeed. Making investments and

advancing public policy to reduce the impact of these factors is imperative to improving economic security and ensuring that more residents can prosper in the Central Coast. The region's housing crisis – whose severity is owed largely to inadequate affordable housing funding, and local and regional land-use policy decisions – is a particularly existential issue.

**“I think salary is one of the biggest challenges. For example, I have a job but I don't have the best job because I need a visa to work here. As an immigrant, we give so much to our community but don't have good quality jobs in return.”**

Listening Session in Santa Cruz



Simultaneously, the region must focus on how dynamics *outside the region* impact the Central Coast's ability to generate and retain jobs that enable workers (particularly those without a bachelor's degree) to make living wages. As a result of macroeconomic trends like globalization and technological change, regions cannot count on continued growth of quality jobs and improvements in standards of living. Instead, they must proactively work to sustain and steward these jobs and industries.

This is particularly true for smaller and mid-sized areas – like much of the Central Coast – that do not benefit from the same depth of talent, investment, and other assets as large cities and regions. Firms and industries in larger areas are often better positioned to develop or adopt new, dynamic technologies and pioneer cutting-edge products and services because of this greater scale. Meanwhile, other U.S. or global competitors offering lower labor costs (typically via lower wages and labor standards) are able to sell cheaper products and services.

The result is that many locally produced goods and services become less marketable (because they offer fewer modern features than competitors), while often also costing more (because of lower economies of scale and higher production costs). This leads to a cascading series of events:

- Consumers typically respond by selecting newer, cheaper products.
- Firms, unable to make profits, either move or shutter local operations.
- Local jobs (many of which may have historically offered quality employment opportunities) are eliminated.
- These contractions reduce spending supporting employment in local-serving industries like healthcare and retail. It is more difficult for a local shop, restaurant, or healthcare facility to thrive when residents have less money to spend.

In this environment, regions must combine the principle of *comparative advantage* with a clear, value-driven focus on supporting industry and job growth that will lead to more quality jobs. They must examine where – based on workers' talents, existing industry strengths, and assets like infrastructure and innovation – their region has a distinctive edge versus competitors. They must then filter these opportunities through the lens of whether the industry provides quality opportunities for workers, particularly those with less than a

bachelor's degree, and ultimately, they must make deliberate, concerted investments to seize these advantages.

Crucially, the region must ensure that local workers – particularly those who face barriers to succeeding in the labor market – can access new or existing quality jobs.

This includes expanding or targeting workforce and education supports, starting with career awareness and skills training in K-12 and extending to postsecondary guidance and wraparound supports for students and workers. Other community-based supports are also typically required to provide culturally responsive and/or more intensive services to help residents complete workforce and education programs and navigate the job market (see the section titled “Empowering Workers” for more information).

Ultimately, addressing this complex set of issues requires the engagement of a wide range of stakeholders encompassing business, government, workforce, education, community groups, and more. This section provides fundamental background information on regional economic and industry performance, with particular attention to quality job creation, to inform this action.

“I wouldn’t raise a kid here where I have been experiencing discrimination since kindergarten.”

Listening Session in Santa Cruz focused on the Black community



### **Why do jobs and productivity matter for an equitable economy?**

For most residents, economic security is determined via a job held by themselves or a family member. When wages are too low to cover costs of living – the case for many in the Central Coast – individuals and families face significant financial strain and hardship. Influencing private-sector job creation (the source of most jobs) to improve the supply of quality jobs (and to upgrade existing jobs) is therefore a core economic development objective.

Firms, however, must increase productivity to both survive against the headwinds of global and national competition and to pay workers more. For instance, if a Central Coast manufacturer lacks the more efficient technologies or processes of a competitor in Los Angeles or Seattle, it will be unable to keep pace with product quality and prices. It will then lose market share and revenue as the value of its products declines, making layoffs more likely than wage increases. Conversely, when a Central Coast manufacturer adopts

and upskills its workers to use new technologies, the value of those workers' labor increases, enabling higher wages.<sup>124</sup>

It is true that this process is not always automatic. Therefore, deep intentionality is required to set priorities. Economic development must prioritize industries that are empirically shown to offer living wages; analysis included in this section provides that data to the sub-sector level and with consideration of workers of different educational and demographic backgrounds.

Industry supports should also be carefully designed and targeted. Small and medium-sized companies – which dominate much of the Central Coast – are often particularly smart targets because they lack the resources of large companies to invest in their own needs and are more closely tied to the local community. Economic development leaders can also play crucial “intermediary” roles in convening both large and small employers within industries to identify and collaborate on common needs, such as workforce. Tangible investments such as workforce programs that build employee-sponsored housing and provide technical assistance for product/process improvements are often also preferable.

### Why do tradable industries matter?

Specific industries like healthcare or manufacturing can be organized into three overarching categories:

- **Tradable industries** sell goods and services to customers outside the region. For example, technology companies develop software and hardware products used around the country and the world. Similarly, the agriculture industry produces lettuces, strawberries, and other commodities sold in many markets.
- **Local-serving industries** sell goods and services primarily to customers within the region. This ranges from restaurants to hair salons to healthcare.
- **The public sector** refers to government jobs.

All three of these industry categories play important roles in communities, supporting jobs, essential services, and quality of life. However, these industries play different roles in shaping the long-term trajectory of the economy.

Tradable industries provide particular benefits that make them a prime focus for *regional economic development*:

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<sup>124</sup> Worker wages are also influenced by other factors such as the level of competition between firms in the region for the same talent, public policy (e.g., minimum wages), and union activity. The State of California has banned some business practices, such as non-compete agreements, that have been used to constrain workers' ability to switch jobs for higher wages in other parts of the United States.

- Tradable industries exchange their goods and services to customers outside the region for money that did not previously exist in the regional economy. This money, in turn, is spent at local grocery stores, restaurants, and other local-serving businesses. If this money did not enter the regional economy, many local-serving businesses and the jobs they contain, simply would not exist.<sup>125</sup> For this reason, a declining or stagnating tradable sector is typically a warning sign of broader economic risk for a region.
- Tradable industries often – but not always – offer higher numbers of quality jobs to workers. Because tradable industries compete against the best of the best on the global stage, successful firms are typically innovative, high-productivity enterprises that, in turn, are able to offer better wages to workers. Depending on the industry, these benefits extend to workers with less than a bachelor’s degree; manufacturing, in particular, has long served this role.

However, no industry is monolithic, reinforcing the importance of intentional strategies backed by empirical analysis and informed by community choices. The Central Coast’s tradable sector is dominated by agriculture and tourism/hospitality, two tradable industries offering uncommonly low job quality. Therefore, investment in tradable industry job creation is better targeted to sectors meeting higher job quality standards for workers, such as manufacturing and technology. Analysis in this section explores this quality job creation potential, including for workers of different demographic and educational backgrounds. Agriculture and tourism/hospitality, meanwhile, may be targeted for improvements to the quality of existing jobs.

Meanwhile, efforts to support job creation in local-serving industries and the public sector embody a number of tensions:

- Local-serving industries do offer quality jobs (albeit often at lower rates dependent on the industry, occupation, and location). However, they respond to – rather than drive – the broader economic impacts of tradable industries.
- For regional economic development, this results in a lower return on public investment for supporting local-serving job creation. In other words, because of the multiplier effects of the tradable sector, each dollar of public investment invested there goes further to support overall job creation.
- However, investment in specific local-serving industries may offer other non-job creation benefits for local communities, such as improving access to health services and quality of place.
- Given scarce resources, these benefits need to be balanced against the danger of losing ground in the tradable sector and the overall economic contractions that would result.

Supporting public sector growth is typically not a tenable political option in most regions, given the associated need for greater government revenue (i.e., taxes).

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<sup>125</sup> Tradable industries spark a multiplier effect that supports an additional three to five new local-serving jobs for each traded sector job created. The precise multiplier effect depends on the industry and geography.

## Putting Growth in Context

Growth is necessary, but insufficient for equitable economic development. Increases in jobs alone, without attention to the quality of those jobs and access for different populations, ignores fundamental factors around both the sophistication and inclusivity of the regional economy. The experience of regions like the San Francisco Bay Area also reinforce that growth alone, without accompanying investments in housing and other supports, encumbers economic mobility and quality of life for many residents. Depending on the industry, growth can also present or exacerbate environmental risks.

This analysis examines macroeconomic growth trends as baseline indicators of the Central Coast's trajectory, and more deeply exploring opportunities for the region to foster more quality jobs – particularly benefitting existing residents with less than a bachelor's degree. Alongside this job growth, the region must act to upgrade the quality of large numbers of jobs that do not offer living wages and other benefits. As described elsewhere in this report, job-based interventions will need to be accompanied by a wide range of strategies and resource investment in both the public and private sector to mitigate barriers and improve access to training and education in order to build an equitable economy.

### **1. Baseline economic fundamentals at the county level diverge across the Central Coast in critical ways that matter for growth and prosperity.**

The Central Coast's six counties vary across a range of baseline economic characteristics, impacting their economic performance. This ultimately points to the need for both shared regional strategies and targeted action at smaller geographies.



**Figure 60: The Scale and Prosperity Metrics by County, 2022 (1 of 2)**

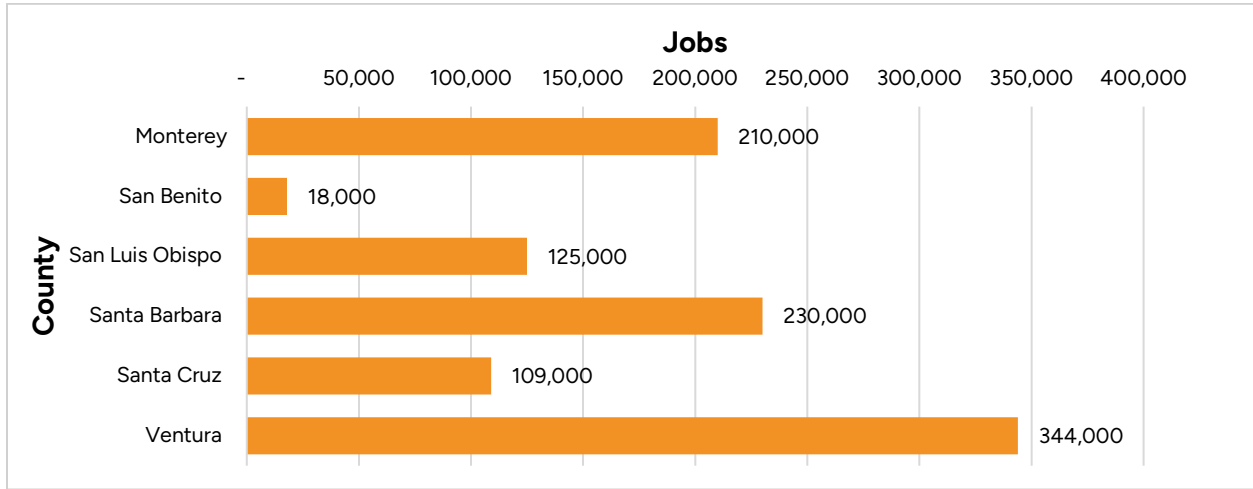
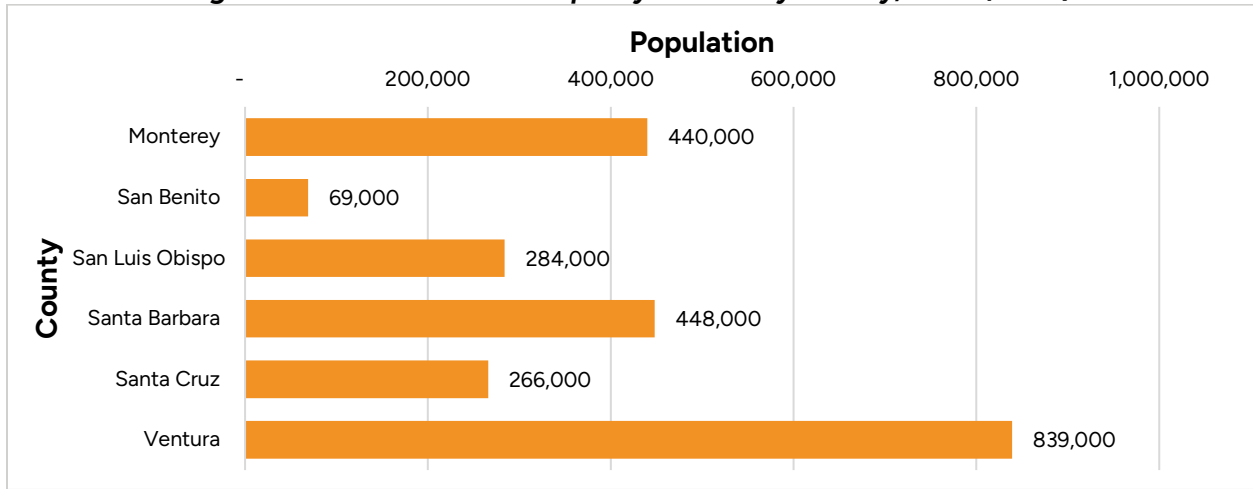


Figure 60: Population and jobs in the Central Coast Region. Source: 2022 Census Population Estimates and Lightcast estimates.

**Figure 61: The Scale and Prosperity Metrics by County, 2022 (2 of 2)**

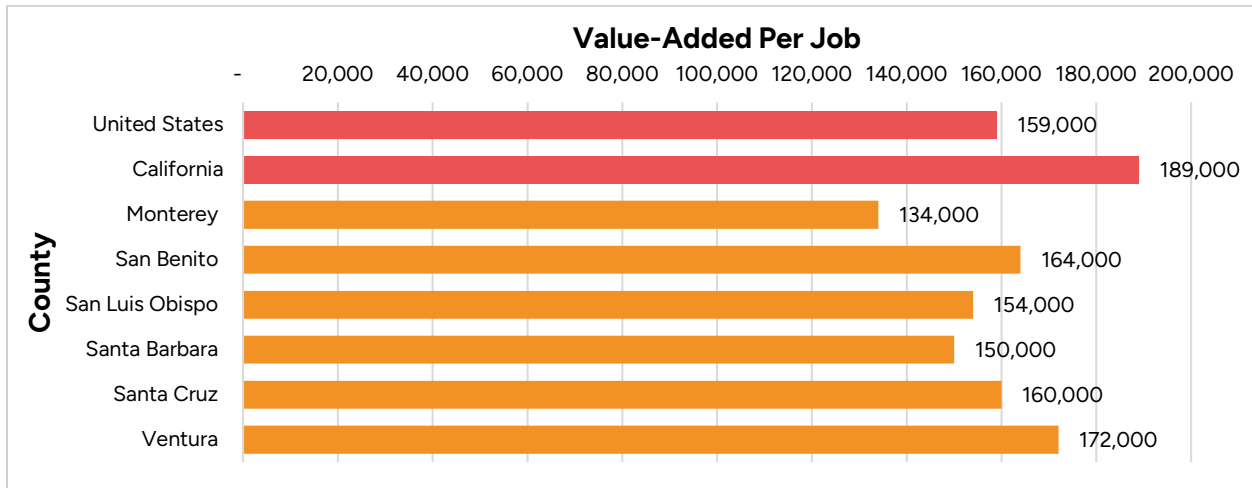
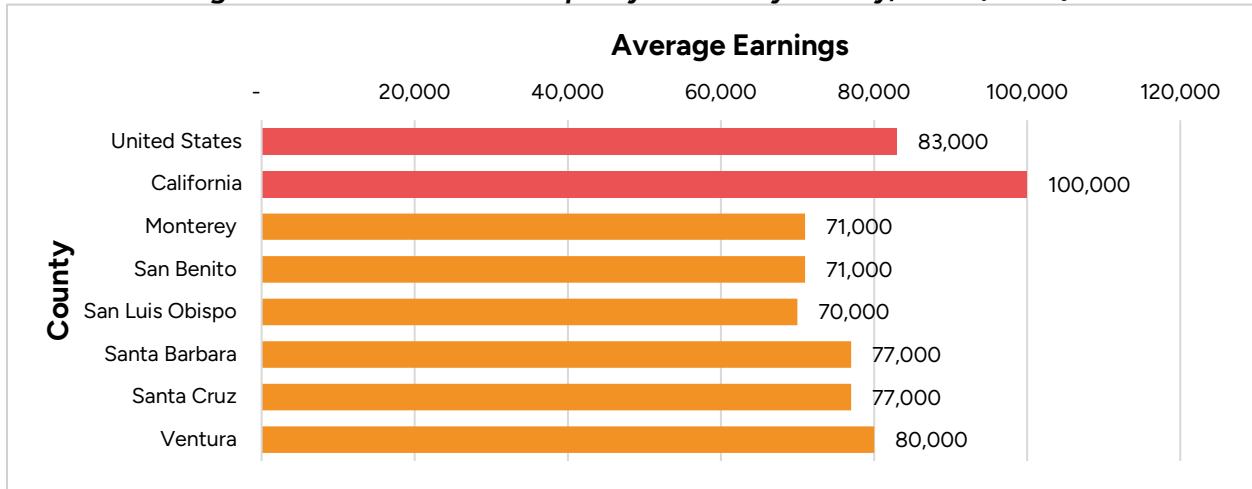


Figure 61: Average earnings and productivity growth in the Central Coast Region. Source: Lightcast estimates.

The population differs significantly throughout the region as shown in Figure 60, from Ventura County (839,000 residents) to San Benito County (69,000 residents), with Santa Cruz, Monterey, San Luis Obispo, and Santa Barbara falling in the middle.<sup>126</sup> Job counts follow a similar pattern, with a greater number of jobs located in more heavily populated counties. Counties also see different “job-to population-ratios” - meaning higher (or lower) numbers of residents per job; for instance, Ventura County has 2.42 people for every job versus 1.9 people per job in Santa Barbara County.<sup>127</sup> This typically reflects socioeconomic trends such as larger numbers of residents commuting outside the county for work or significant presence of retirees.

The counties also vary in aspects of economic performance that translate into higher wages for workers. For instance, as shown in Figure 61 Ventura County has average earnings that are 15 percent higher than those in San Luis Obispo County (the lowest in average earnings) and productivity that is 27 percent higher than that of Monterey County (the lowest in productivity

<sup>126</sup> 2022 Census Population Estimates based on the American Community Survey.

<sup>127</sup> Brookings/Cities GPS analysis of Lightcast estimates and Census Population Estimates.

regionwide).<sup>128</sup> These divergences, despite common industries such as manufacturing and agriculture, suggest higher levels of industry *strength and sophistication* in some areas than others. These differences may be attributable to the specific industry attributes of one area versus another (e.g., specializing in a higher-value form of manufacturing) and/or relative strength of competitive assets (e.g., talent, innovation) in higher-performing areas than others. Attention to these trends can help determine areas where industry-strengthening programs are necessary to improve availability of quality jobs and improve outcomes for workers.

Despite these differences *between all counties*, analysis revealed similarities *between adjacent counties*, providing a foundation for sub-regional responses. San Luis Obispo County has a very similar economic structure to Santa Barbara County, which is also very similar to neighboring Ventura County. The three northern counties (Monterey, San Benito, and Santa Cruz) are less economically similar than the southern counties but still resemble each other quite closely. These groupings are echoed by analysis of commuting patterns. While inter-county commuting in the region is low overall (and no two counties form a shared labor market), ties among the three northern counties are strongest, as are ties between the contiguous pairs of southern cities.<sup>129</sup>

A subset of county pairings - Santa Cruz and San Benito; San Luis Obispo and Santa Barbara; and Santa Barbara and Ventura - also have occupational structures that are even more similar than their industrial structures.<sup>130</sup> This finding suggests that these county pairs might also benefit more from shared approaches to workforce development given their similar occupational structures.

In addition to connections within the Central Coast, several counties also have important economic connections to adjacent metropolitan areas. For instance, San Benito County is part of the San Jose-Sunnyvale-Santa Clara metropolitan statistical area. Ventura County similarly has strong connections to the Los Angeles region. These connections create both opportunities and challenges for respective counties. For instance, leaders in San Benito and Santa Cruz are both focused on creating or retaining more economic activity locally, versus having residents commute long distances. Local leaders are also focused on retaining growing companies that might leave for larger markets to scale. At the same time, firms in these counties have been able to leverage their proximity to the Bay Area to attract testing, demonstration, and production activity for which there is not available space in more urbanized areas.

This analysis reinforces that different areas within the Central Coast are characterized by varied economic, social, and geographic dynamics, bolstering the importance of sub-regional approaches.

#### — Areas for Further Exploration —

- Data reflecting commuting patterns from the Central Coast to nearby regions (Los Angeles, San Jose, San Francisco).

<sup>128</sup> Brookings / Cities GPS analysis of Lightcast estimates and Census population estimates.

<sup>129</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>130</sup> Brookings / Cities GPS analysis of Lightcast estimates.

## 2. Overall trends suggest the need to strengthen economic competitiveness in order to deliver improved wages.

Despite the ups and downs of the pandemic and its aftermath, the Central Coast economy has grown at a steady pace. Between 2012 and 2022, the region posted job gains every year except 2020 (see Figure 63). Growth in value-added – meaning improvements to a final product or service exceeding initial inputs – has been less consistent but sizable nonetheless over the same period.<sup>131</sup>

However, other indicators suggest that the region’s economy has an opportunity to be more competitive and take advantage of new industries with high-quality tradable jobs that lead to improvements to productivity (or value-added per job) and average earnings (see Figure 61). This improved productivity ultimately translates to both durable economic growth (by increasing the sophistication and value of goods and services relative to other regions) and improved wages (by increasing the value of labor). Comparative data suggests that the Central Coast has untapped economic potential that requires industry-focused measures to improve competitiveness.<sup>132</sup>

Productivity growth (see Figure 63) was weak to negative through much of the period leading up to the COVID-19 pandemic and now appears to be reverting to pre-pandemic levels. Average earnings were also growing at a slower rate than jobs and overall earnings before the pandemic and seem to be following the same downward trend as productivity. Recessions often lead to spikes in average earnings and productivity as lower-wage workers lose their jobs. Those who remain in the workforce tend to have better paying jobs in high productivity industries, which help push those two indicators up.<sup>133</sup>

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<sup>131</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>132</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>133</sup> Brookings / Cities GPS analysis of Lightcast estimates.

**Figure 62: Job Growth in the Central Coast Region 2012-2022**

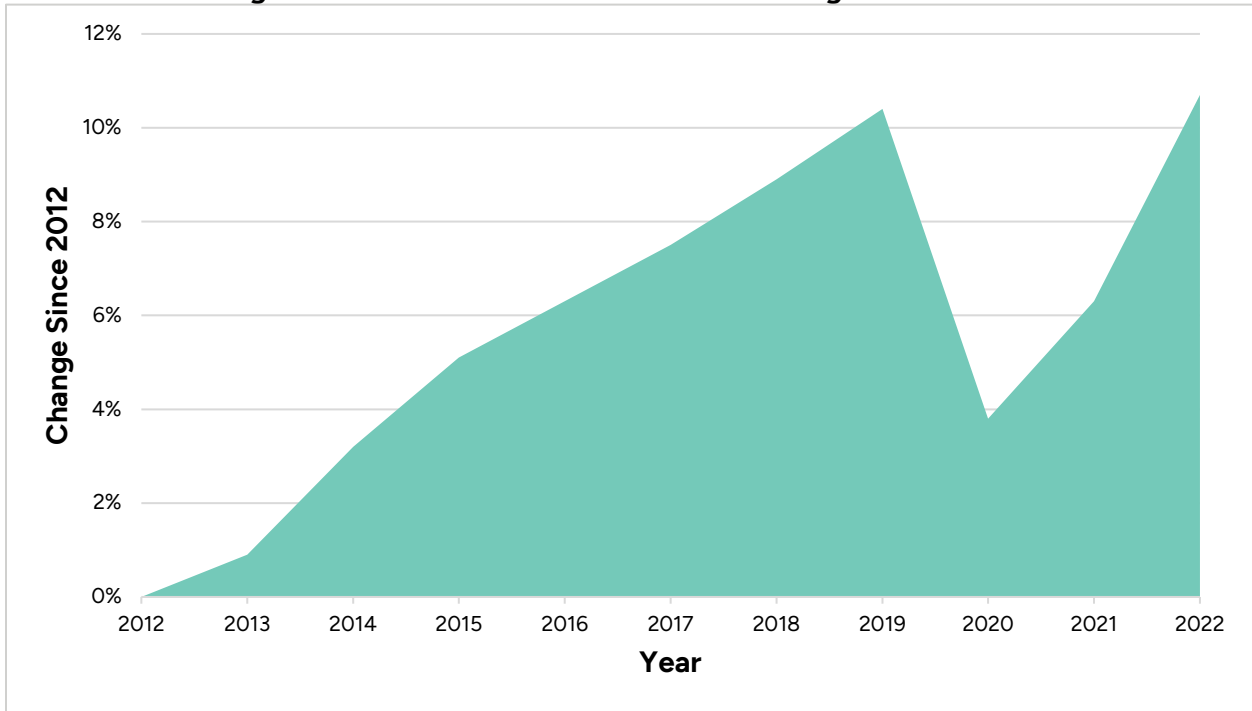


Figure 62: Job growth shown by economic performance in the Central Coast region from 2012 to 2022. Source: Brookings analysis of Lightcast estimates.

**Figure 63: Productivity Growth in the Central Coast Region, 2012-2022**

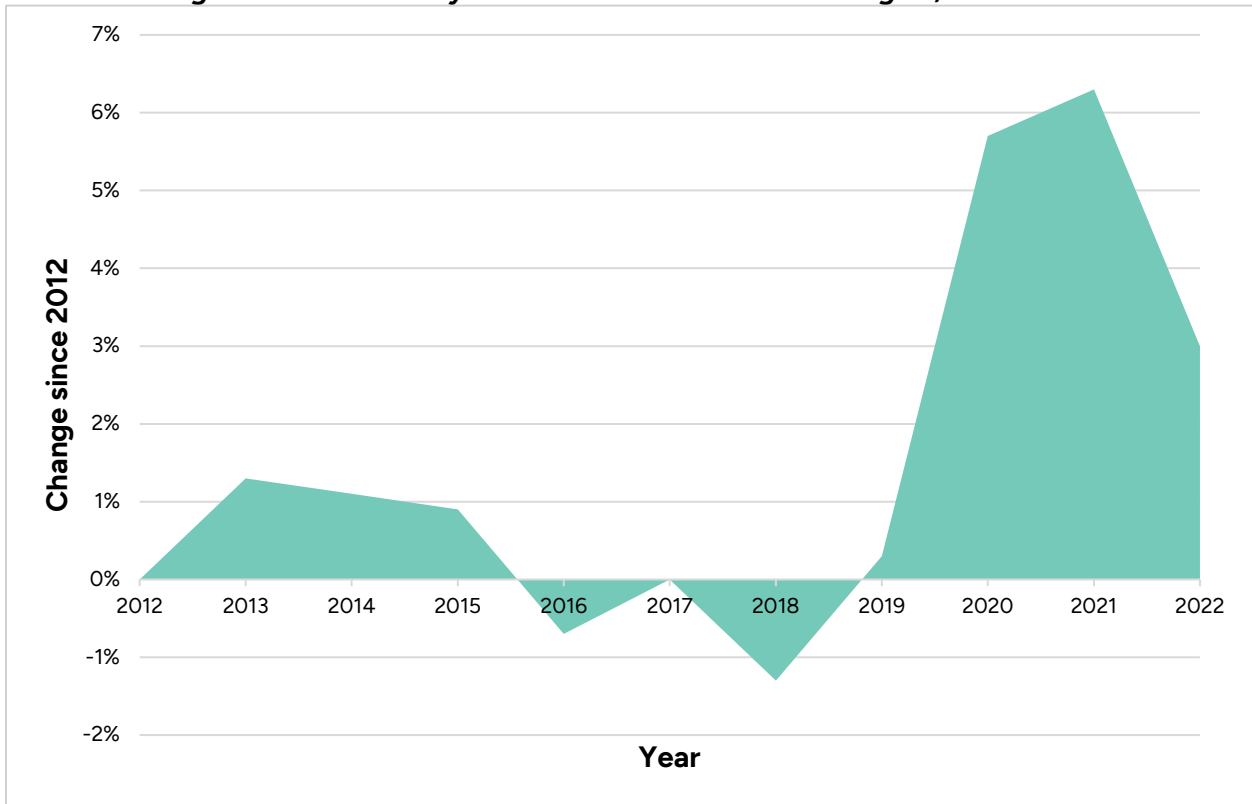


Figure 63: Productivity growth shown by economic performance in the Central Coast region from 2012 to 2022. Source: Brookings analysis of Lightcast estimates.

Indeed, the region’s industries as a whole did not keep pace with gains made by their counterparts in California and nationwide from 2012-2022. In some categories, such as average earnings per job, the Central Coast lagged benchmarks only a little; on other measures, such as productivity, earnings, and value-added, the lag is much larger. The same dynamics hold throughout the region, with a few exceptions. Every county except for Ventura beat at least one benchmark in at least one performance measure and a few counties exceeded benchmarks on multiple measures.<sup>134</sup>

Trends vary based on industry and sub-region, reinforcing distinctive dynamics that require customized interventions. For example, agriculture across the Central Coast outperformed growth benchmarks while manufacturing lagged on all measures, and professional services did better on productivity but worse on growth. Meanwhile, even though all counties performed at or below expectations, Ventura County struggled the most. Because Ventura County is by far the largest economy in the region, its weaker economic performance hurt regional trends overall.<sup>135</sup>

Competitiveness trends are likely, in part, driven by the scale and industrial composition of the Central Coast. Much of the Central Coast consists of mid-size urban areas dispersed across a predominantly rural landscape. Notwithstanding the presence of some large firms such as Google Quantum in Santa Barbara; Amazon in Santa Barbara, San Luis Obispo, and Santa Cruz; Gilead Sciences in Santa Cruz; and Amgen in Thousand Oaks, firms tend to be small and medium-sized enterprises, with few companies large enough to be considered anchor employers. These companies often face capacity constraints and specific challenges around workforce development, innovation intensity, and supply chain growth that can constrain growth and productivity. The region’s affordability challenges – principally scarcity of housing – also directly inhibit the ability of firms to procure and retain talent, impacting productivity and competitiveness.

### **Methodology: Regional Industry Performance**

Economic analysis employs a range of complex quantitative methods to assess performance and growth opportunities. The following explains one such approach: “shift-share decomposition.”

How a certain industry performs depends on a number of factors: some that are unique to the regional economy and others that stem from industry trends and state and national economic circumstances. Shift share analysis is a quantitative approach that offers insight into the relative influence of these various factors within a particular industry.

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<sup>134</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>135</sup> Brookings / Cities GPS analysis of Lightcast estimates.

The analysis begins by identifying macroeconomic growth—how the economy performed as a whole—and industry-specific growth—how a particular industry performed—at the state and national levels during a given time period (in this case, 2012-2022).<sup>136</sup> These findings (the first four bars in Figure 64) are then combined to reveal the expected growth of the given industry (the teal bar) based on state and national macro and industry trends. When expected growth (the “Expected” bar) is subtracted from actual growth (the “Actual” bar), the result is the local shifts (the “Local Shifts” bar), those factors specific to the region that affected industry growth. These insights together offer a way to evaluate the competitiveness of local industries and identify opportunities for market-leading growth.

**Figure 64: Contribution of Growth Factors to Regional Economic Growth for the Central Coast Region, 2012-2022**

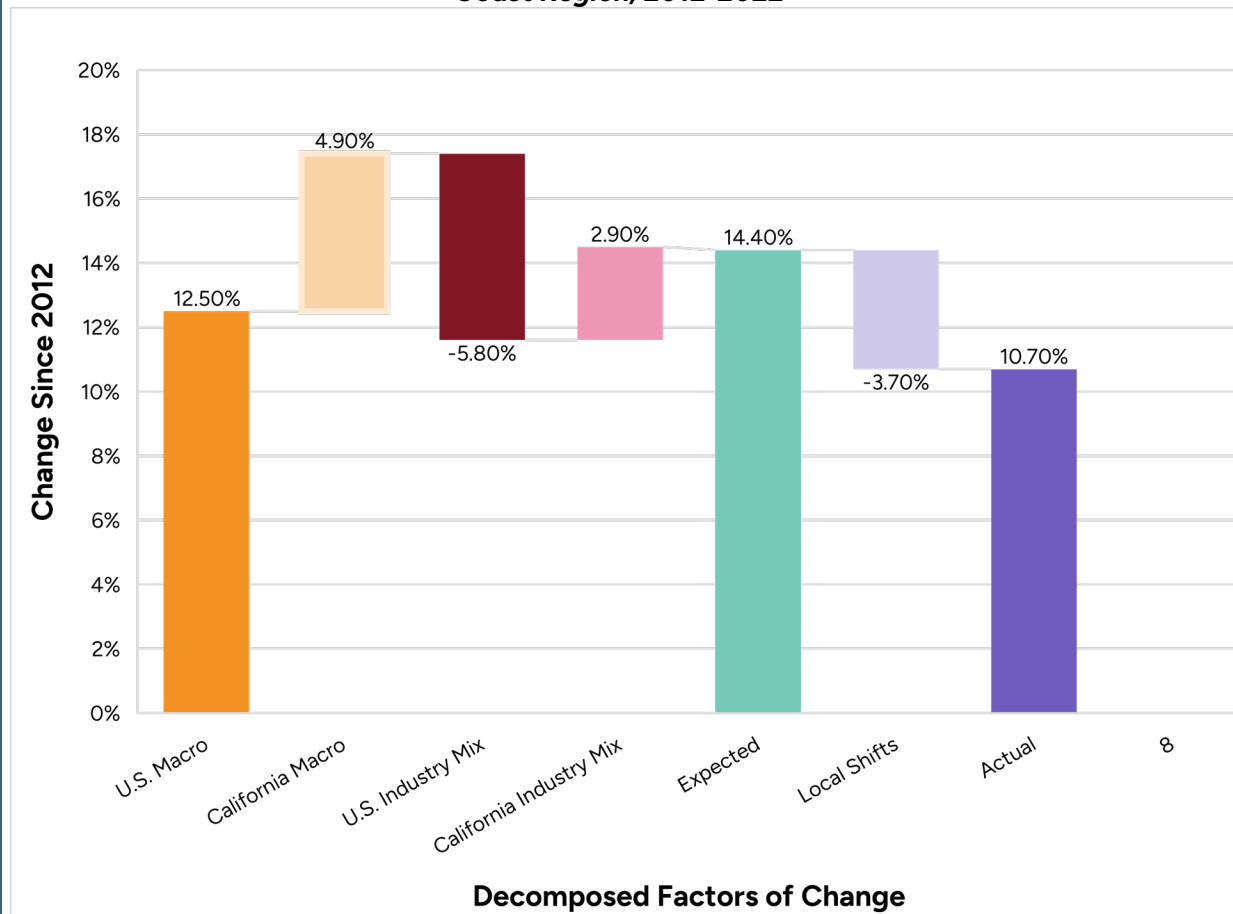


Figure 64: Effects of national, state, and industry growth factors on the region's economic growth, using dynamic shift share analysis to reduce sensitivity to choice of start year and inter-year shifts. Source: Brookings / Cities GPS analysis of Lightcast estimates.

Between 2012 and 2022, California’s economy grew approximately 40 percent faster than the nation’s as a whole. A comparison of the first two bars demonstrates the extent to which the state outperformed the nation. These impressive results likely accelerated positive economic trends inside the state, providing a helpful tailwind for the Central Coast region.

The two “Industry Mix” bars in the chart show that jobs in the Central Coast were concentrated in industries that grew more slowly at both the state and national levels. Here again, California outperformed the United States, which may have created another beneficial tailwind for regional economic growth.

Adding the first four bars together gives us the expected growth in the region based on state and national benchmarks (represented by the “Expected” bar). Subtracting expected growth from actual growth (the “Actual” bar) yields the “Local Shifts” bar or localized factors affecting economic growth. The negative number reflects the slower-than-expected growth seen in the Central Coast economy.

### 3. Strengthening tradable industries is key to bolstering the region’s growth and prosperity engine.

While all industries play important roles in contributing to regional vitality, tradable industries are particularly significant for regional prosperity (see Sidebar “Why Do Tradable Industries Matter?”).

However, in the Central Coast, tradable industries on the whole saw relatively weaker performance throughout the region between 2012 and 2022, particularly in knowledge-intensive segments such as professional services, information, and finance that tend to offer higher concentrations of quality jobs (see Figure 65).<sup>137</sup> Growth in jobs, earnings, value-added, and average earnings all lagged local-serving industries. Notably, tradable industries saw declining productivity every year from 2015 to 2022.<sup>138</sup>

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<sup>136</sup> Comparisons to state or national changes in key economic indicators show how those benchmarks would have performed if they had the same industrial base as the region. For example, at the beginning of each year of the analysis, the state is given the same industrial composition as the region. The total change in that metric, summed across all industries, shows how the region's economy would have changed if each of its industries had performed in the same way as that industry did statewide. Those annual changes are then summed across the entire period of analysis. The effect is to be able to understand differences in the pace of change on key indicators independent of differences in industrial composition. This means that if a benchmark happens to be overweight in an especially fast-growing industry relative to the region, the disproportionate effect of that industry on overall performance is neutralized.

<sup>137</sup> The “information” sector is defined in the NAICS as “(a) producing and distributing information and cultural products, (b) providing the means to transmit or distribute these products as well as data or communications, and (c) processing data.” See <https://www.census.gov/naics/?input=51&year=2022&details=51>.

<sup>138</sup> Brookings / Cities GPS analysis of Lightcast estimates.



**Figure 65: Sectoral Contributions to Job Growth in the Central Coast Region 2012-2022**

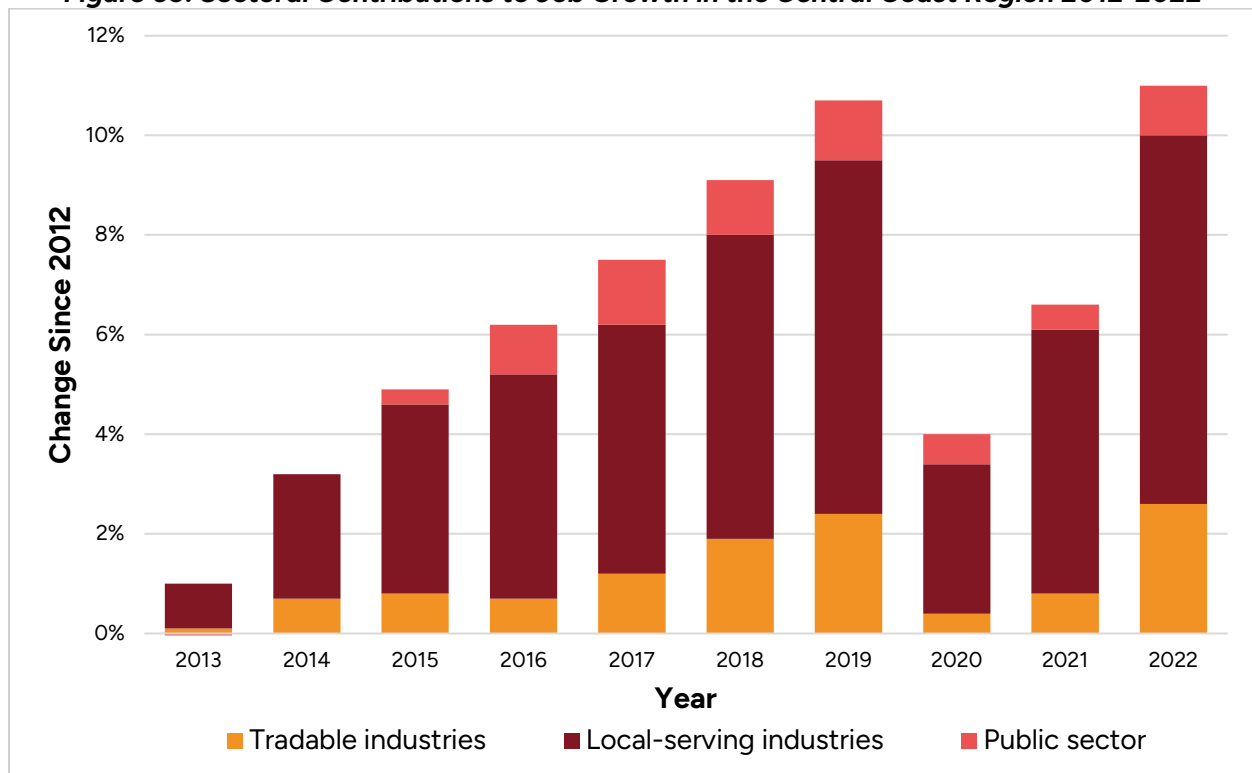


Figure 65: Sectoral contributions to economic performance in the Central Coast region from 2012 to 2022. Source: Brookings analysis of Lightcast estimates.

These trends persist across the region, with some variation, pointing to general weakness of tradable industries. Only San Benito County saw appreciable tradable industry employment growth; however, this occurred off a small base, largely driven by lower-value logistics and tourism activity, and following earlier declines in average earnings and productivity. Ventura County saw consistent declines in traded sector employment (accounting for a 9.7 percent decrease in total employment between 2012-2022, largely because of double-digit declines in agriculture, manufacturing, and finance) and value-added. Meanwhile, it saw growth in productivity (perhaps owing to job losses of less productive workers).<sup>139</sup> While tradable industry job growth remained positive in all other counties (albeit lagging local-serving industries), San Luis Obispo and Santa Cruz saw sizable declines in average earnings. All counties but Ventura saw significant declines in tradable industry productivity.<sup>140</sup>

In the absence of strong-tradable industry growth, local-serving industries such as construction, healthcare, and hospitality fueled much of the region’s economic growth during this period. Across the region, local-serving businesses accounted for 69 percent of job growth between 2012 and 2022, versus 23.8 percent from tradable industries and 9.4 percent from the public sector. Local-serving industries also accounted for between 55 and 95 percent of the region’s economic performance during this ten-year period, depending on the measure examined.<sup>141</sup>

<sup>139</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>140</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>141</sup> Brookings / Cities GPS analysis of Lightcast estimates.

This balance of growth is concerning for the region's economic future. It signals that the region's tradable industries may not be keeping pace with national and global competitors. Weakness in the region's tradable sector threatens the ongoing sustainability of local-serving industries that rely on the new wealth that the former brings into the economy by selling goods and services to customers outside the region. It also threatens the presence of quality jobs disproportionately concentrated in many tradable sectors.

#### 4. The region has a significant gap in providing quality jobs to many residents, particularly those who are younger, less educated, and non-white.

##### What Counts as a Quality Job?

To better target inclusive economic and workforce development strategies, the Brookings Institution developed a novel Opportunity Industries analysis identifying the sectoral distributions of "quality" and "promising" jobs that enable workers to achieve self-sufficiency for themselves and their families.

While conventional economic assessments focus on average wages and measures of an industry's prominence in a particular region, the Opportunity Industries methodology offers a granular understanding of both job quality and career progression by sector, occupation, and worker demographics. This information can help communities prioritize economic development activities that strengthen sectors that create quality jobs, improve job quality in other clusters, and improve resident access to workforce outreach and training programs.

According to the Brookings Opportunity Industries methodology, a *quality job* must:

- Pay an annualized living wage that allows families to make ends meet while accumulating long-term and emergency savings
- Offer employer-sponsored health insurance (a proxy for other worker benefits)
- Provide worker stability in terms of retaining or leading to another quality job in the future

*Promising jobs* are those positions that do not meet all of the above criteria, but provide pathways into a quality job within ten years. They are identified using a complex review of worker transitions between and among occupations and industries over time. This category of jobs recognizes that entry-level work often does not meet the standard of a quality job, but can help workers advance in their careers by providing opportunities to acquire experience and skills. It also accounts for the fact that most people now switch occupations and industries multiple times over the course of their working lives (as opposed to climbing a defined career ladder within a given profession, as was more common in decades past).

Positions that do not qualify as either quality or promising jobs are classified as *other jobs*. It is important to recognize that while such jobs do not meet wage and benefit standards, workers' contributions and labor are valuable. For instance, jobs not meeting quality or promising job standards often include farmworker roles responsible for ensuring local and national food supplies and care roles looking after children and the elderly.

The Opportunity Industries analysis involves setting a wage threshold for what constitutes a quality job in a particular geography. This involves two key inputs:

- Production of localized self-sufficiency "market basket" budgets of basic monthly expenses (e.g., housing, food, childcare, healthcare, transportation, taxes) (see section "Understanding the Central Coast")
- Analysis of an hourly wage curve that accounts for a wide range of family compositions and annual income needs to determine what proportion of the population can achieve self-sufficiency at a given income level

The analysis in this report is based on an annual wage needed to lift half of all struggling parents into self-sufficiency. In the southern sub-region, a wage threshold of \$70,000 per year would accomplish this goal. In the northern sub-region, the wage threshold needed to achieve the same goal is slightly higher: \$75,000 per year.<sup>142</sup>

Other factors, ranging from holding a stable schedule to working indoors versus outdoors, are also critical job quality factors, but are difficult to consistently measure across places. Community input on these factors supplements analysis throughout this report.

Only a quarter of jobs in the Central Coast currently qualify as quality jobs, due to the dominance of low-wage industries, such as agriculture and hospitality, and the region's extraordinarily high costs of living. This startling reality demands an urgent focus on creating jobs within industries that support quality jobs and upgrading existing jobs to improve their ability to support worker and family self-sufficiency. Because a lack of affordable housing drives up costs of living, it also speaks to the impact that local land-use decisions have in increasing costs and artificially reducing the number of quality jobs in the region.

A further 15.2 percent qualify as "promising jobs," meaning they provide a pathway to a quality job within ten years. The remainder of regional jobs – 59.3 percent – count as neither quality nor promising jobs.<sup>143</sup>

Notably, rates of job quality and worker likelihood of holding a quality job vary significantly based on industry, location, and demographic factors. These trends provide guidance for

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<sup>142</sup> Wage thresholds are determined by economic modeling projecting the wage required to lift half of all struggling parents (as revealed by "struggling workers" analysis in the "Understanding the Central Coast" section) into self-sufficiency.

<sup>143</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata.

improving the region's base of quality jobs and reducing barriers for access. They also suggest structural disparities that result in wide differences in access for different population groups.

- Residents in some counties are more likely to hold a quality job than residents of other counties. 27.6 percent of Ventura County residents hold a quality job (the regional ceiling), versus 21.7 percent in Monterey County (the regional floor). Monterey County also has the lowest regional share of promising jobs (11.7 percent) and the highest regional share of jobs that neither qualify as quality or promising (66.6 percent).<sup>144</sup>
- Workers of certain races and ethnicities are more likely to hold a quality job than others. Across the Central Coast as a whole, 38.7 white residents hold a quality job compared to 13.2 percent of Hispanic/Latino/x/e residents, 25.5 percent of Black residents, and 34.1 percent of Asian and Pacific Islander residents.
- Variable trends in quality job attainment can also be observed by gender. 21 percent of women hold a quality job, versus 29.6 percent of men. This, in part, likely reflects the reality that jobs in women-heavy “pink collar” industries such as healthcare and education are typically lower-paid.
- Workers with higher educational attainment are also significantly advantaged in the labor market. 12.3 percent of workers with a high school diploma or GED hold a quality job, compared to 27.2 percent of those with an associate's degree and 52 percent of bachelor's degree holders.
- Within categories of workers with the same educational attainment, racial and gender disparities remain evident. For instance, 7.6 percent of Black women with an associate's degree hold a quality job, compared to 15.5 percent of Black men, 12.1 percent of Hispanic/Latino/x/e women, and 27.4 percent of white women. These trends are consistent across most educational categories.<sup>145</sup>

Industries also vary dramatically in their likelihood to offer quality jobs to workers, with additional variation by location and sub-sectors (see Figure 67 and Figure 68). For instance, 31.9 percent of manufacturing jobs in Ventura County qualify as quality jobs (with another 15.5 percent counting as promising jobs), versus 19.7 percent of manufacturing jobs in Monterey County counting as quality jobs (and another 12.8 percent counting as promising). Further, 47.9 percent of transportation equipment manufacturing jobs count as quality jobs, versus 10.2 percent of food manufacturing jobs. Women are generally more likely to hold quality jobs in education and healthcare versus manufacturing, construction, or agriculture.<sup>146</sup>

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<sup>144</sup> The analysis of quality jobs examines jobs located in a given county, regardless of where the worker lives. So, if a resident of Ventura County works in Los Angeles County, his or her job is not reflected in this analysis. Conversely, if a Los Angeles County resident works in Ventura County, his or her job is counted in the analysis. This provides an accurate depiction of the local job base rather than the resident workforce, which is analyzed elsewhere in the report.

<sup>145</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata.

<sup>146</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata.

**Figure 66: Share of Quality and Promising Jobs by Industry**

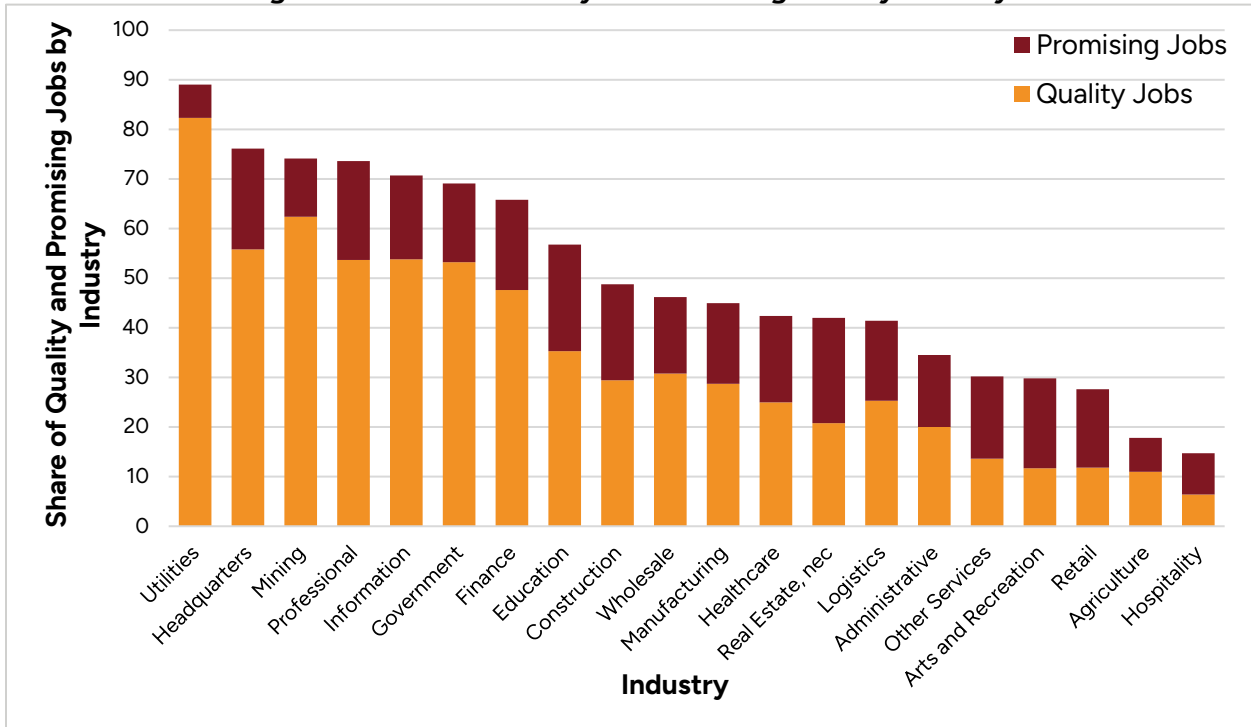


Figure 66: Concentration of quality and promising jobs in Central Coast industries. Source: Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata sample.

**Figure 67: Scale of Quality and Promising Jobs by Industry**

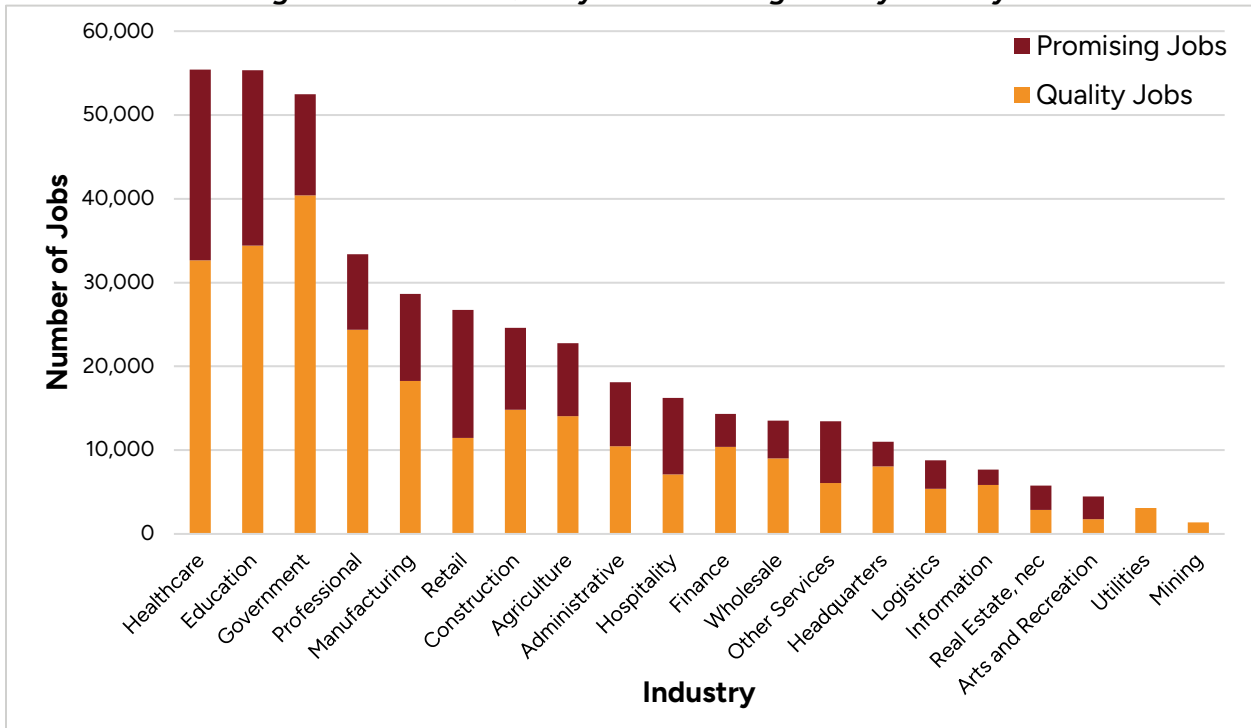


Figure 67: Scale of quality and promising jobs in Central Coast industries. Source: Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata sample.

Though weighed down by lower-paying agriculture jobs, tradable industries are more likely to offer quality jobs (26.8 percent) and promising jobs (12.9 percent), versus local-serving industries (with 18.7 percent of jobs counting as quality jobs and 15.5 percent counting as promising), reflecting the value of these sectors. Tradable industries are also more likely to offer quality jobs to workers with lower educational attainment; 35.1

percent of associate's degree holders in a tradable industry hold a quality job, compared to 21.7 percent in local-serving industries. For those with some college or a certificate, 27 percent in a tradable industry hold a quality job, compared to 12.9 percent in local-serving industries.<sup>147</sup>

**“Do I have a good Job? No, not at all – I’m a fieldworker: bending over every hour sucks. It’s painful.”**

Listening Session in Santa Barbara focused on outdoor workers, Latino/x/e, Spanish and Mixtec speakers, and environmentally disadvantaged communities



**“I have to overcome sexual harassment and lack of respect [when working in the fields]; I have to be quiet about that, but all of us have it the same; it’s something terrible and if I told you what happens there you would be scared; if I complained, where would I go?”**

Listening Session in Monterey focused on African American communities



The public sector, while not a target for economic development intervention, also tends to offer quality jobs at a high rate in the region (44.5 percent). A further 18.5 percent of public sector jobs count as promising jobs.<sup>148</sup> That said, community members shared that low salaries deter people from running for public office, leaving vacancies in key positions.<sup>149</sup>

Scale also matters; some industries that offer high rates of job quality, such as utilities (80.8 percent), offer relatively few total quality jobs (3,084 across the Central Coast). Meanwhile, other industries with more total jobs, such as hospitality and agriculture, offer low rates of job quality (6.4 percent and 11 percent respectively).<sup>150</sup>

<sup>147</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata.

<sup>148</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata.

<sup>149</sup> Community Convenings in July 2023.

<sup>150</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata.

## 5. Regional industries offer differing potential for achieving high-value growth and quality jobs.

The Central Coast’s economy is propelled by agriculture, hospitality, and local-serving sectors (such as healthcare, construction, food service, retail, and other parts of the economy that cater primarily to local consumers), alongside manufacturing and knowledge intensive industries such as information and finance. These industries offer different prospects for both achieving high-value growth and providing more workers with quality jobs.

### Agriculture

**Agriculture** dominates the regional economy in size and scale, ranking as one of the most highly concentrated and specialized industries in the six-county Central Coast region. Crops and livestock range from strawberries to lettuces, cauliflower and broccoli, wine grapes, artichokes, and grassfed beef, cultivated in mega fields stretching from Ventura to Salinas and Watsonville. These commodities, in turn, support a range of additional food and beverage manufacturing activities, such as winemaking. They also support a significant employment base, albeit with variable trends in job growth from 2012 to 2022. Over this period, agriculture contributed significantly to job growth in some counties (e.g., Monterey at 38.7 percent and Santa Barbara at 34 percent) but not in others (e.g., Santa Cruz at -14.2 percent and Ventura at -12.4 percent). In all, agriculture drove 17.9 percent of employment growth across the Central Coast from 2012 to 2022.<sup>151</sup>

Agriculture, however, poses significant challenges for job quality and economic mobility. Only 11.2 percent of agriculture jobs across the Central Coast region qualify as quality jobs. This drops to 3.3 percent for workers with less than a high school diploma and 3.4 percent for those with a high school diploma or GED, categories that account for many farmworkers. Only 5.5

“One of my coworkers got injured and the company did not pay her for it. When she tried to go back to work after some time, they didn’t hire her back. They dispose of us as if we were trash.”

Listening Session in Monterey focused on Mixtecan communities



percent of Hispanic and 7.2 percent of Black workers hold a quality job compared to 29 percent of Asian and Pacific Islander workers, and 59.5 percent of white workers. Rates of workers holding quality jobs in agriculture also vary from county-to-county, peaking at 17.6 percent in Santa Cruz County and bottoming out at 7.3 percent in San Luis Obispo County.<sup>152</sup> These differences are likely explained by differences in commodities produced (with higher value production generally leading to higher

<sup>151</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>152</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata.



wages) or greater presence of higher educated management, operations, maintenance, and other roles commanding greater wages. Agriculture also contains a low share of promising jobs (6.8 percent), suggesting little opportunity for workers to move into higher paid positions.

For its frontline workers, the industry also poses issues beyond low wages. Demands are particularly acute for agricultural workers, who routinely work outdoors for long hours in highly challenging physical conditions, subject to extreme heat, air pollution, and other hazards. Many jobs are also seasonal, requiring workers to move multiple times a year and live apart from communities and supports.

Agriculture is also especially susceptible to impacts of climate change.

Geographical features such as proximity to the ocean and topographical assets, such as the Templeton Gap near Paso Robles, render parts of the region less immediately subject to rising temperature than the Central or San Joaquin Valleys. However, even incremental increases in temperature, along with unpredictable periods of drought and deluge, can impact short-term growing, the longer-term viability of crops, and ongoing conditions for workers.

Agriculture technology offers some solutions to many of these issues, albeit not at the full scale of the problem. Adoption of technology shifts demand for workers, creating better jobs that involve deploying and maintaining equipment and software, rather than deploying people to do manual activities like physically picking fruits and vegetables. However, intentional strategies and additional resources are required to ensure existing local agricultural workers are first in line for these new jobs and the training they require. In addition, because technology adoption means fewer total jobs, strategies are required to address displaced workers and help these individuals transition to other jobs.

Agriculture technology development offers opportunities for the region to capture additional value from the digitalization of agriculture – developing, testing, and manufacturing innovative products and services that can then be sold to other U.S. and international markets. Salinas has distinguished itself as an emerging leader in agriculture technology development, leveraging its proximity to Silicon Valley to serve as a testing ground for new products and services, with a particular focus on weeding and harvesting. Adjacencies also exist between emerging regional strengths in unmanned aerial systems and drones for agriculture technology, also with novel applications to fighting wildfires.

**“Us, the fieldworkers, perform the most demanding jobs that no one else wants to do and still the pay is really low. On top of that, we also get humiliated, mistreated, and insulted by the bosses. We are discriminated against because of our immigration status. They step over our human rights.”**

Listening Session in Monterey with Chatinos





From this base, strategies for continued industry growth may include attracting additional firms (including startups through accelerator competitions and foreign firms through “soft landing” supports), raising regional industry profile through marketing and events, and – above all – continuing to build the manufacturing workforce to support expansion. Agriculture technology firms are also present elsewhere in the region, albeit at smaller scale and at more nascent development less positioned to compete with established market leaders. The California Polytechnic State University (Cal Poly) Strawberry Center, a partnership with the California Strawberry Commission, demonstrates efforts to develop agriculture technology elsewhere in the region.

### What Makes a Job “Good” is Subjective

While Uplift heard from many farm workers about their challenges, some of them, particularly those native to Latin America, indicated that they love working in fields. They have industry expertise and feel a deep connection to the land, enjoy being outside, and take great pride in the critical services that they provide. They just want to be paid more – a livable wage – to do that work.

Community meeting in Monterey

## Hospitality

**Hospitality** is also a major economic driver, although embodying similar concerns regarding job quality and upward mobility for workers. Establishments ranging from large resorts owned by multinational companies to wineries, boutique hotels, and mom-and-pop motels leverage the region’s natural resources to draw tourists from across the United States and the world. Major hospitality centers include Santa Barbara, the Santa Ynez Valley, Paso Robles, and areas of Monterey.

The industry registered strong growth between 2012 and 2022, indicating continued demand. The hospitality industry represented at least 10 percent of job growth across all six Central Coast counties, with San Luis Obispo (30.3 percent), San Benito (28.5 percent), and Ventura (23.7 percent) seeing even higher proportions. Hospitality drove 18.2 percent of employment growth across the Central Coast over 2012 to 2022.<sup>153</sup>

However, hospitality struggles to offer quality jobs to most of its workers; only 6.4 percent of hospitality jobs qualify as quality jobs, peaking in Monterey County (8.9 percent) and bottoming out in Ventura County (4.3 percent). Subsectors offering the most quality jobs include travel accommodation, RV parks, and recreation camps, but never exceeding San Luis Obispo’s 21.4 percent for its RV parks and recreation camps.<sup>154</sup> An additional 8.3 percent of jobs across the Central Coast qualify as “promising,” reflecting limited opportunity to move into better jobs.

Solutions underway for improving job quality include offering pathways to management positions (although the number of these positions remains limited), and provision of stipends for gas and other work-related expenses. Efforts to build a wine corridor in southern Monterey County would also place jobs there in closer proximity to worker populations, reducing

<sup>153</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>154</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata sample.

transportation barriers. The City of Paso Robles, which has significant hospitality activity, has also focused recent attention on bolstering aerospace and parts of precision manufacturing related to medical technology to balance its economic mix towards additional higher paying jobs.

The hospitality and tourism industry is also subjected to climate risks. For example, extreme weather events such as well publicized mudslides near Santa Barbara, flooding resulting in closure of access to Big Sur, and lost grape harvest and wine production due to wildfires in Monterey create short-term disruption and longer-term instability for business. These dynamics translate to lost revenue for businesses and lost wages for workers.

## Manufacturing

Though a smaller share of employment than agriculture or hospitality, manufacturing is also an important economic driver throughout the Central Coast. Specializations range from precision manufacturing and beverage manufacturing in San Luis Obispo and Santa Barbara Counties to biotech, metals, and machinery manufacturing in Ventura County. This sector includes some of the region's most innovative economic activity, such as semiconductor and aerospace production, highly specialized hardware, an emerging unmanned aerial systems industry, and blue economy-related activity.

Manufacturing contributed significantly to overall job growth in Santa Cruz (24.8 percent), San Benito (24.1 percent), and San Luis Obispo (14.6 percent) over 2012-2022, but caused a sharp decline (-14.8 percent) in Ventura County. Outcomes in Ventura are largely attributable to the decline of sectors related to petroleum, one segment of the county's overall manufacturing base.<sup>155</sup>

Subsectors overperforming against benchmarks across the Central Coast include beverage manufacturing; converted paper product manufacturing; ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing; motor vehicle parts manufacturing; other general purpose machinery manufacturing; other transportation equipment manufacturing, and pharmaceutical and medicine manufacturing.<sup>156</sup> Strengths in individual counties ranged from navigational, measuring, electromedical, and control instruments manufacturing (Santa Cruz County) to beverage manufacturing (Monterey County), pesticide, fertilizer, and other agricultural chemical manufacturing (San Benito County), semiconductor and other electronic component manufacturing (San Luis Obispo County), aerospace products and parts manufacturing (Santa Barbara County), and industrial machinery and motor vehicle manufacturing (Ventura County).<sup>157</sup>

Job quality in manufacturing varies considerably, reflecting the wide range of industry activity underway in the region. Higher value-add areas like transportation equipment manufacturing and computer and electronic product manufacturing see quality job rates upward of 40 percent, while food and paper manufacturing see rates downward of 15 percent. Job quality rates also differ from county to county, reflecting different specializations; 15.1 percent of manufacturing jobs in Monterey County count as quality jobs, versus 32.4 percent in Ventura County and 34.4 percent in Santa Barbara County. Manufacturing tends to offer above-

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<sup>155</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>156</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>157</sup> Brookings / Cities GPS analysis of Lightcast estimates.

average job quality to workers with less than a bachelor's degree. For instance, 29.5 percent of manufacturing jobs held by associate degree recipients and 25.7 percent held by workers with some college or a certificate count as quality jobs, both exceeding the average for those levels of educational attainment.<sup>158</sup>

Given their connection to high-value innovation activity and good wages, manufacturing sectors are already economic development targets in many parts of the region. Manufacturing has been a long-term focus in Ventura County and for EDC; recent efforts include stand-up of an employer-led Ventura County Industry Council to address common needs, such as talent access, and strategies to bolster economic development connections to significant defense assets at three major Naval Warfare Centers at Point Mugu and the Port of Hueneme. Ventura stakeholders have also focused considerable effort over the past 10 to 15 years in building a biotechnology innovation and manufacturing ecosystem around historically insular (and downsizing) large anchors Amgen and Baxter<sup>159</sup>. Led by the Ventura Bioscience Alliance, this has included developing wet lab space and enabling greater capital access through presence of a biotech-focused venture capital fund, Westlake Village Bio Partners.

REACH has led efforts to bolster aerospace and precision manufacturing in Santa Barbara and San Luis Obispo counties, building from a strong base of firms producing goods ranging from semiconductors to deep sea diving equipment and bacteria testing kits. Entities from the City of Paso Robles to the Santa Barbara South Coast Chamber are leading complementary efforts, such as building a space test corridor and an Advanced Manufacturing Upskilling Network, respectively. In San Benito, boosting manufacturing is a focus for diversifying the county's industry base and growing more local jobs to reduce the need for residents to commute to San Jose; efforts include a planned innovation park and work to position the Hollister airport as a site for advanced air mobility testing. High-profile efforts in Monterey and Santa Cruz Counties have focused on growing a regional specialization in advanced air mobility, leveraging proximity to Silicon Valley innovation to offer testing and production. This strategy has been epitomized by the success of Marina-based Joby Aviation and presence of other market players such as Archer Aviation and Wisk Aero. The University of California – Santa Cruz (including through the Center for Information Technology Research in the Interest of Society (CITRIS) Initiative for Drone Education and Research) and the Monterey Bay Drone, Automation and Robotics Technology (DART) have been leading catalysts of this specialization.

Despite these efforts, however, manufacturing faces ongoing challenges in the region. Access to talent at both high-skill and mid-skill levels is a growing issue, exacerbated by the barriers the region's extremely high cost of living poses for attracting and retaining workers. Employers and business intermediaries also cite regulation and business climate as a perennial challenge for operating in the state of California. In 2023, Joby Aviation announced a significant manufacturing expansion in Dayton, Ohio (translating to up to 2,000 jobs), where it received over \$300M in public incentives – vastly exceeding California's offer (Joby later announced a separate expansion at Marina airport, projected to result in 600 jobs).

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<sup>158</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata sample.

<sup>159</sup> Baxter departed the region in the mid-2010s.

## Healthcare and the Central Coast Economy

Although healthcare is not a tradable sector, it makes important contributions to the overall economy and quality of life in the region. It employs significant numbers of workers, helps secure the health and well-being of area residents, and provides vital services in times of crisis. A strong healthcare sector also makes the Central Coast more attractive to workers and companies looking to relocate.

19.7 percent of employment growth between 2012 and 2022 was attributable to the healthcare sector. Sub-sectors growing strongly compared to benchmarks include general medical and surgical hospitals, continuing care retirement facilities and assisted living facilities, and residential intellectual and developmental disability, mental health, and substance abuse facilities.<sup>160</sup>

While healthcare occupations tend to have clear, well-established career pathways that can promote career advancement and increase workers' economic mobility, job quality is variable depending on educational attainment. 25 percent of healthcare jobs count as quality jobs, exceeding the average for local-serving jobs (18.7 percent). A further 17.4 percent count as promising jobs. The percentage of quality jobs reaches 26.4 in Santa Cruz County and 27.2 percent in Santa Barbara County. However, rates are lower for workers with some college or a certificate (12.6 percent), a high school diploma or GED (4.8 percent), and with less than a high school diploma (2.4 percent), versus those with an associate's degree (27.4 percent) or a bachelor's degree (46.1 percent).<sup>161</sup>

The size of the regional healthcare workforce is determined by the size of the population served. As a result, demand for healthcare workers is consistent over time (aside from surges during pandemic-scale events) and largely unaffected by economic downturns. This stability means more job security for healthcare workers compared to other industries.

Since healthcare is not tradable, the sector's contribution to an inclusive economy comes not from rapid job growth but rather by expanding access and supporting pathways into healthcare careers. As described in the section "Understanding the Central Coast," some parts of the region and populations lack equitable access to health care services. A greater proportion of struggling families should also be able to benefit from quality jobs in the region's healthcare sector.

## Information / Professional Services / Finance

The Central Coast also boasts strengths in information, professional services, and finance industries. Santa Barbara and San Luis Obispo for instance, host offices for Amazon's Alexa and Kindle platforms, Google Quantum, and other firms encompassing sophisticated aspects of

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<sup>160</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>161</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata sample.

artificial intelligence, machine learning, and autonomous systems. Santa Cruz has spawned companies such as Looker (a business intelligence platform acquired by Google in 2019), Paystand (a business-to-business payment platform), and Netflix.

However, the information industry grew slower than benchmarks from 2012 to 2022, suggesting potential weakness. Jobs at the regional level declined by 12 percent, while value-added declined 2.43 percent. These job losses were spread across Monterey County (declining nearly 43 percent), Santa Cruz (declining nearly 30 percent), San Benito (declining nearly 20 percent), and Ventura (declining nearly 19 percent). Santa Barbara and San Luis Obispo remained positive decade-over-decade, but lagged benchmarks. Monterey (-46 percent), Ventura (-20 percent), and Santa Cruz (-14 percent) drove the decline in value-added.<sup>162</sup>

Subsectors performing particularly poorly at the regional level included software publishers, computer systems design and related services, motion picture and video industries, and sound recording industries. Declines in Monterey were driven by losses to media distribution and book publishing. Ventura County similarly performed poorly in media and book publishing. Software was weak against benchmarks throughout the region, although in some cases likely reflecting slower growth from an existing strong base.<sup>163</sup>

Finance similarly experienced headwinds, seeing job losses in Ventura County (-34 percent), Monterey (-9.76 percent), San Luis Obispo (-8 percent), and San Benito (-5.42 percent). Ventura also saw double-digit declines in earnings and value-added. Monterey and Santa Barbara underperformed benchmarks in earnings, value-added, average earnings, and productivity.<sup>164</sup>

While many technology companies generally shed employment in the early 2020s following the COVID-19 pandemic, these trends largely precede that time period. Santa Barbara and San Luis Obispo-based technology firms described acute talent challenges tied to costs of living, resulting in some software positions being located remotely in other states. Additional engagement with firms, such as through industry Roundtables, may help to further tease out local dynamics.

55 percent of jobs in the information industry across the Central Coast count as quality jobs; this varies from 64.9 percent in Santa Barbara (which hosts 2,846 such quality jobs) to 37.5 percent in Monterey (which hosts 295 good information jobs). Some subsectors, such as software publishers, see job quality rates exceeding 75 percent. These quality jobs, however, are disproportionately held by white male workers with a bachelor's degree or higher, suggesting disparities in access.<sup>165</sup>

47 percent of jobs in finance across the Central Coast count as quality jobs, ranging from 37.3 percent in San Luis Obispo County to 57 percent in San Benito.<sup>166</sup> These positions, however,

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<sup>162</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>163</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>164</sup> Brookings / Cities GPS analysis of Lightcast estimates.

<sup>165</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata sample.

<sup>166</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey microdata.

are also significantly weighted towards white workers holding a bachelor's degree or higher. Women are slightly better represented in quality finance jobs than in information.<sup>167</sup>

Despite these declines, information and finance still represent thousands of regional jobs, including many that pay well. Some declines may also be attributable to the movement of jobs to adjacent areas, rather than the elimination of jobs. For instance, in 2010 (prior to the period examined in this analysis), a large Farmers Insurance office shifted from Simi Valley (in Ventura) to nearby Woodland Hills (in Los Angeles County). While regional leaders need to be attuned to these declines, an implication to be drawn from this analysis is that these industries may need to be targeted for support to bolster competitiveness, rather than de-emphasized.

### **Top Regional Employers<sup>168</sup>**

Large employers in the Central Coast reflect the dominance of industries like agriculture, hospitality, local-serving sectors (such as healthcare, construction, food service, and retail), manufacturing, and knowledge-intensive industries such as information and finance. Like most regions across the country, they also reflect sizable consolidated employment in local government and school districts.

Specific large employers include universities and community colleges, county and local governments, school districts, federal installations, and prisons. Large private employers include Amgen (in Ventura County), several hotels and resorts, agricultural companies, manufacturers, and hospitals. In smaller counties, grocery stores and other merchants (e.g., Target) can count as top employers.

Examining top employers without context, however, poses several risks. Employment numbers alone do not capture wages or other indicators of job quality. Further, focusing on the largest employers overlooks mid-sized firms and small businesses. For instance, the industrial composition of certain industries in the region (e.g., innovation-intensive manufacturing) leans towards smaller and mid-sized firms. This means that many do not meet the threshold of highest total employment, despite significant economic impact. See the full list of top regional employers in Annex 6.

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<sup>167</sup> Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata sample.

<sup>168</sup> California Employment Development Department, "Major Employers in California," September 2023, <https://labormarketinfo.edd.ca.gov/majorer/MajorER.asp>.



## 6. Entrepreneurship and small business trends suggest potential need for greater supports.

Entrepreneurship and small business development play a critical role in regions, embodying the “dynamism” that creates new value in the economy, supporting job creation, and enabling wealth-building, including for Black, Indigenous, and People of Color populations often excluded from economic opportunity.

Quantitative and qualitative data together provide a mixed picture of the region’s entrepreneurial performance. Metrics of job growth in young firms (those aged zero to five years) provide a largely positive view, particularly in Santa Barbara County. However, other analysis shows the region underperforming in earnings and consistency of jobs in startups, suggesting greater instability and potential supports needed.

National data and qualitative input both suggest that entrepreneurs who are Black, Indigenous, or People of Color face distinct structural barriers (e.g., less access to capital), impacting the ability to start and sustain a business.

Unfortunately, localized entrepreneurship data disaggregated by race and ethnicity is limited across the country, particularly for smaller regions like those that make up the Central Coast. Therefore, quantitative analysis here focuses on the population as a whole. Additional exploration of the needs of entrepreneurs who are Black, Indigenous, or People of Color and other entrepreneurs is planned for the strategy phase.

“If I could have a superpower, it would be the making everyone understand the importance of small businesses.”

Uplift Committee Member, November Committee Meeting



As shown in Figure 68, many parts of the region meet or exceed California averages for employment contributions by younger firms (meaning the share of private-sector employees working in startups less than five-years old). This indicates strength of regional startups, with some variability in performance across counties:

- Santa Barbara overall had a notably larger share of jobs contributed by firms up to five years old.
- Monterey also performed marginally better in share of jobs at young firms.
- Monterey ranked 5<sup>th</sup> and Santa Barbara ranked 15<sup>th</sup> in the State in job share for firms aged two through three years.
- San Luis Obispo maintained above average job contributions for mid-age firms of six through ten years.<sup>169</sup>

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<sup>169</sup> Analysis of Kauffman Foundation Entrepreneurial Jobs Indicators (2022).

**Figure 68: Entrepreneurship Contributions to Private Sector Employment**

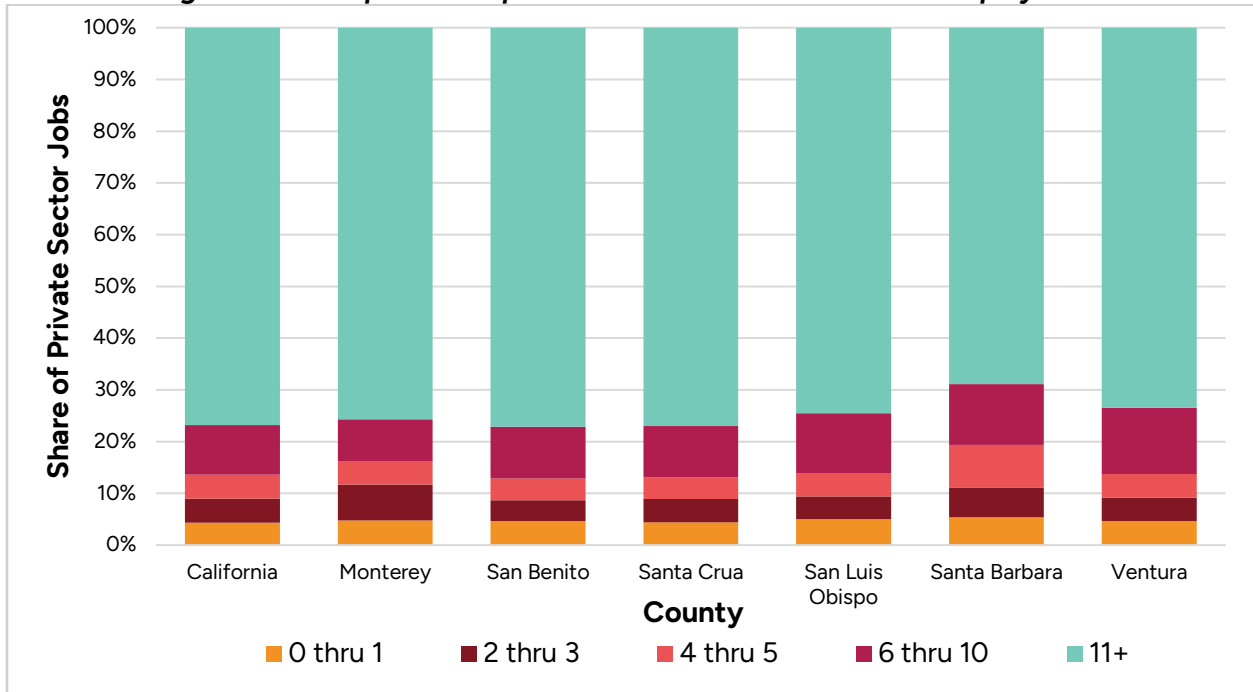


Figure 68: Share of private sector jobs accounted for by firms of a given age. Source: Analysis of Kauffman Foundation Entrepreneurial Jobs Indicators (2020).

Analysis of job creation and employment in the youngest firms (ages zero to one) and transitioning to more established enterprises (aged five) offers further context (Figure 69 and Figure 70).

For job creation in the youngest firms (ages zero to one):

- Santa Barbara outperforms the State and most other Central Coast counties, affirming its strength in spawning new businesses. The county saw a particular spike in this category in 2017, potentially attributable to a single large young firm.
- Monterey trails the State and most other counties in net new jobs in the youngest firms in most years, save for a spike in 2018, potentially also attributable to a single large young firm.
- San Luis Obispo sees a spike between 2018 and 2020, moving ahead of the State (and Santa Barbara in 2019).
- Ventura, San Benito, and Santa Cruz consistently trail the state on this measure.<sup>170</sup>

<sup>170</sup> Analysis of Kauffman Foundation Entrepreneurial Jobs Indicators (2022).



**Figure 69: Number of Net New Jobs Created in Private Sector Firms Ages Zero through One Year per 1,000 People by County and Compared to California, 2016-2020**

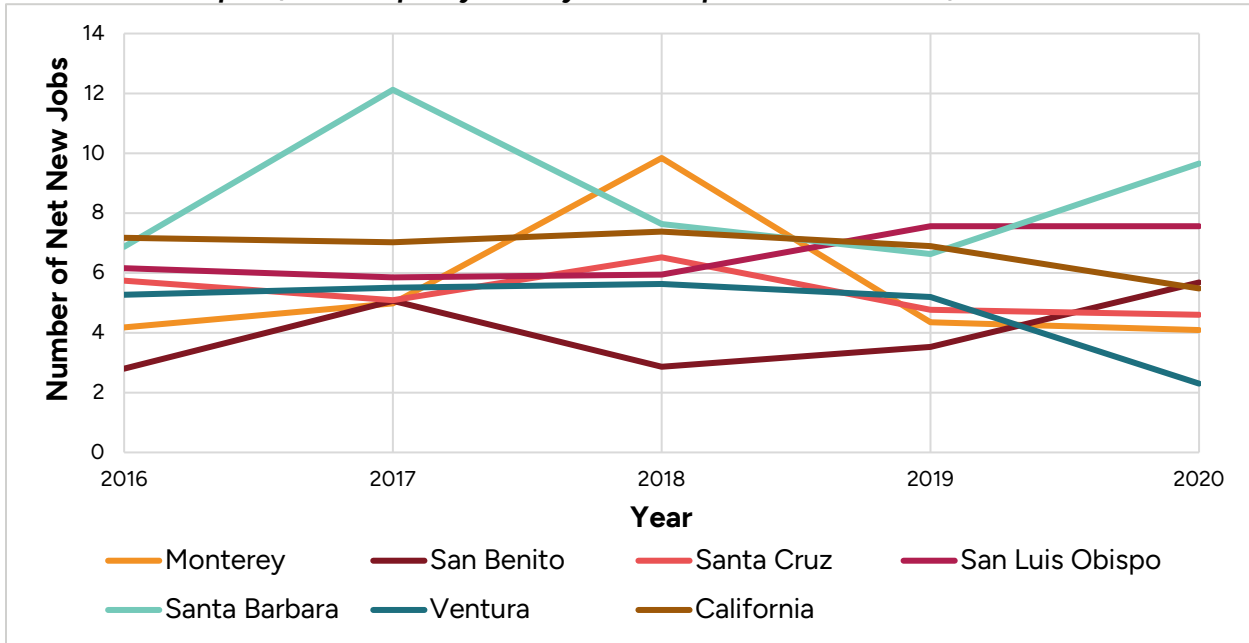


Figure 69: Number of net new jobs created in private sector firms ages zero through one year per 1,000 people (2016-2020). Analysis of the total number of jobs at young private sector firms aged 5 years (the typical starting point for being considered a mid-stage company) offers further context on durability of entrepreneurial growth by how well a region both starts and sustains new businesses. San Benito County data not used due to accuracy issues from consolidation in the San Jose-Sunnyvale-Santa Clara MSA, where San Benito represents about 3 percent of total jobs and population. Source: Analysis of Kauffman Foundation Entrepreneurial Jobs Indicators (2022).

- Analysis of the total number of jobs at young private sector firms aged five years (the typical starting point for being considered a mid-stage company) offers further context on the durability of entrepreneurial growth (i.e., whether the area succeeds in both starting new businesses and keeping those businesses operating and growing over time).
- Building on its strong performance in earlier measures, Santa Barbara continues to see robust growth.
- Ventura outperforms all counties (including Santa Barbara) over the first half of the 2010s, before declining in the later part of the decade. Monterey, meanwhile, sees steady improvement on this measure, exceeding Santa Barbara by 2019.
- San Luis Obispo and Santa Cruz typically lag other counties, suggesting challenges to scaling.<sup>171</sup>

<sup>171</sup> Brookings analysis of U.S. Census Bureau’s Longitudinal Employer-Household Dynamics (LEHD) program.

**Figure 70: Percentage Change in Number of Jobs at Private Sector Firms Aged Five Years, by County, 2011-2021**

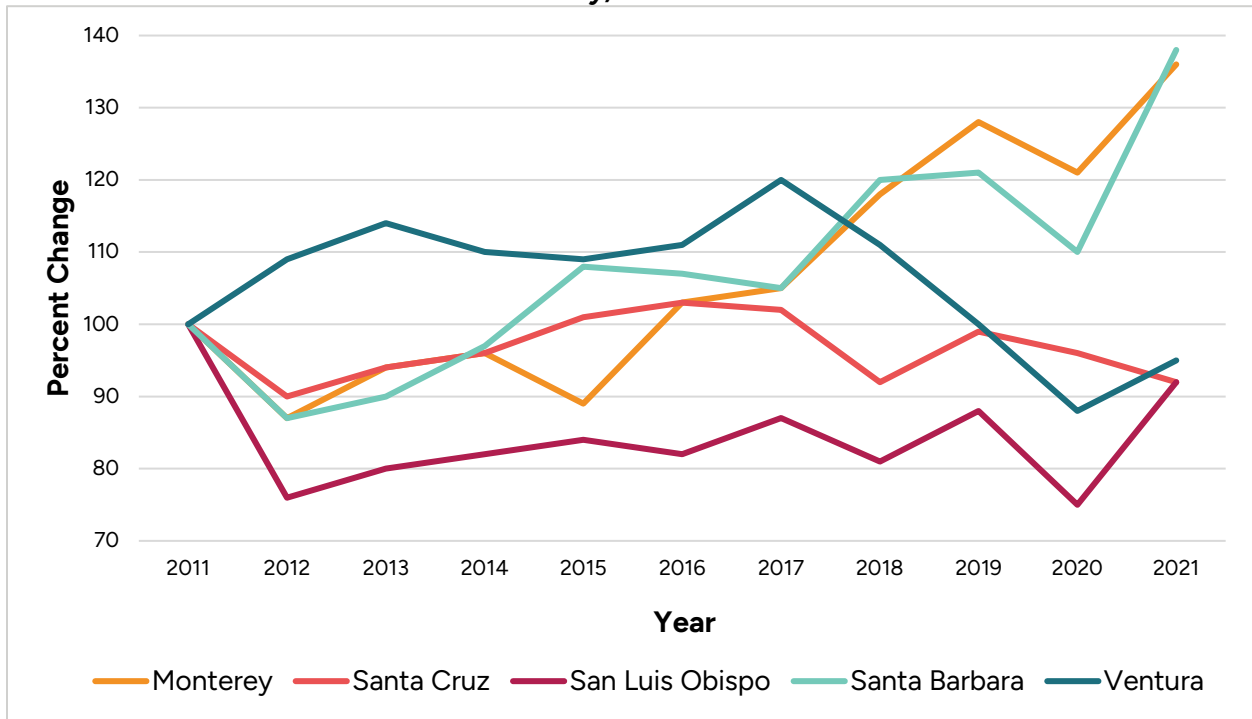


Figure 70: Percentage change from indexed baseline number of jobs at private sector firms aged five years (2011-2021). San Benito County data not used due to accuracy issues from consolidation in the San Jose-Sunnyvale-Santa Clara MSA, where San Benito represents about 3 percent of total jobs and population. Source: Brookings Metro Monitor 2023, analysis of U.S. Census Bureau’s Longitudinal Employer-Household Dynamics (LEHD) program.

Deeper analysis of relative earnings and job constancy (jobs held with the same employer for three consecutive quarters) suggests potential gaps in performance (see Figure 69 and Figure 70). While some instability is innate to the dynamic process of entrepreneurship, startups in the Central Coast Region tend to see more churn and offer lower earnings than state and national comparisons. Although State comparisons are likely weighted by performance of larger startup-heavy regions, these results suggest that Central Coast firms may face gaps in resources that enable success.

**Figure 71: Compensation in Young Firms by County, 2022**

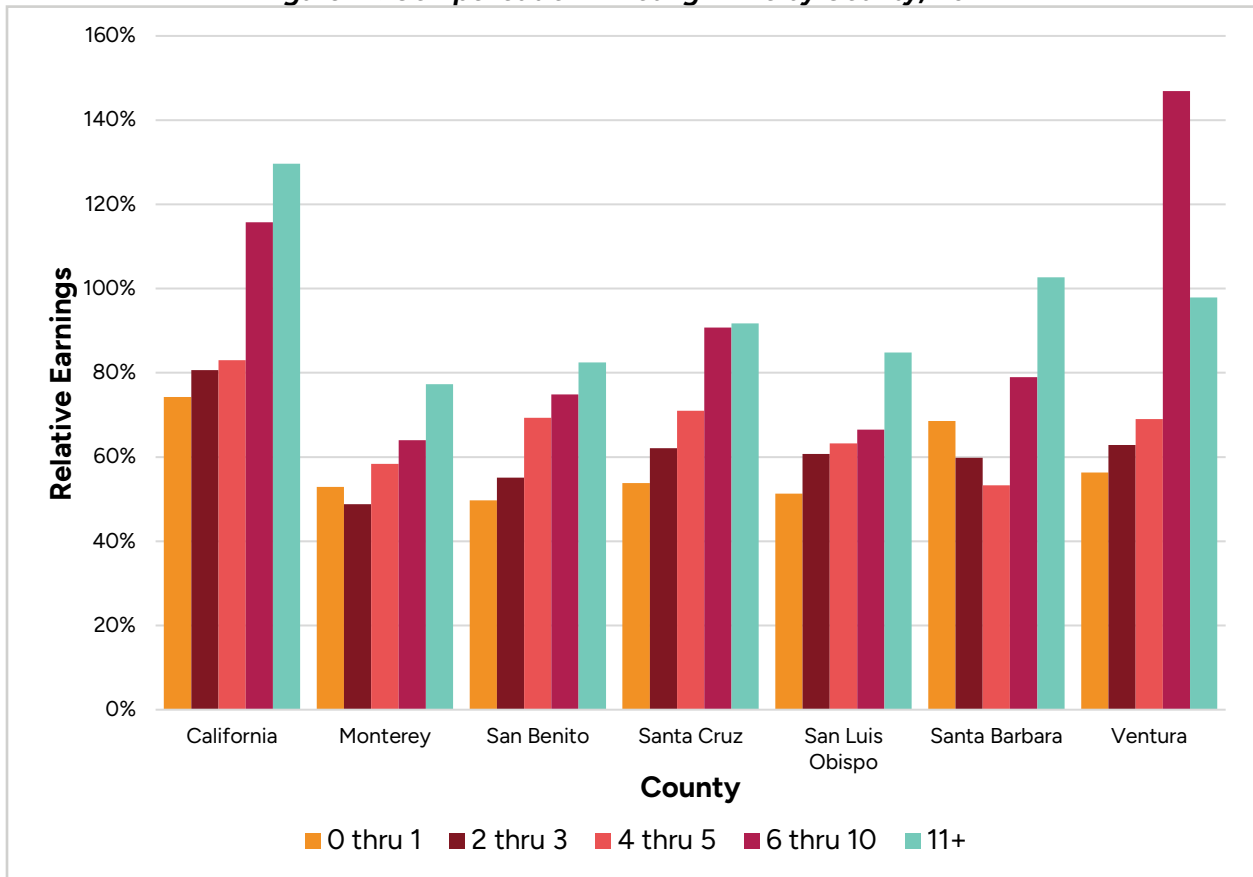


Figure 71: Relative earnings of employees in private sector firms of a given age compared to average earnings of all U.S. employees. Source: Analysis of Kauffman Foundation Entrepreneurial Jobs Indicators (2022).

Overall, earnings at young firms (those aged zero to five) did not match statewide averages (see Figure 71). Nationwide, relative earnings of private sector jobs at firms zero through one years old was 66.4 percent of average earnings at firms of all ages. Only Santa Barbara met the national standard, but then declined as firms aged and fell short of the California average.<sup>172</sup>

Meanwhile, the region also underperforms state and national baselines for stability of jobs in young firms (see Figure 72). Nationally, 53.8 percent of jobs held at firms zero through one years old lasted three or more quarters, roughly on par with California. However, rates in the Central Coast fall to 43.75 percent in Monterey and 47.5 percent in Santa Barbara. Santa Barbara experiences particularly high job turnover among young firms less than six years old, despite above par job creation.<sup>173</sup>

<sup>172</sup> Analysis of Kauffman Foundation Entrepreneurial Jobs Indicators (2022).

<sup>173</sup> Analysis of Kauffman Foundation Entrepreneurial Jobs Indicators (2022).

**Figure 72: Job Constancy in Young Firms by County, 2022**

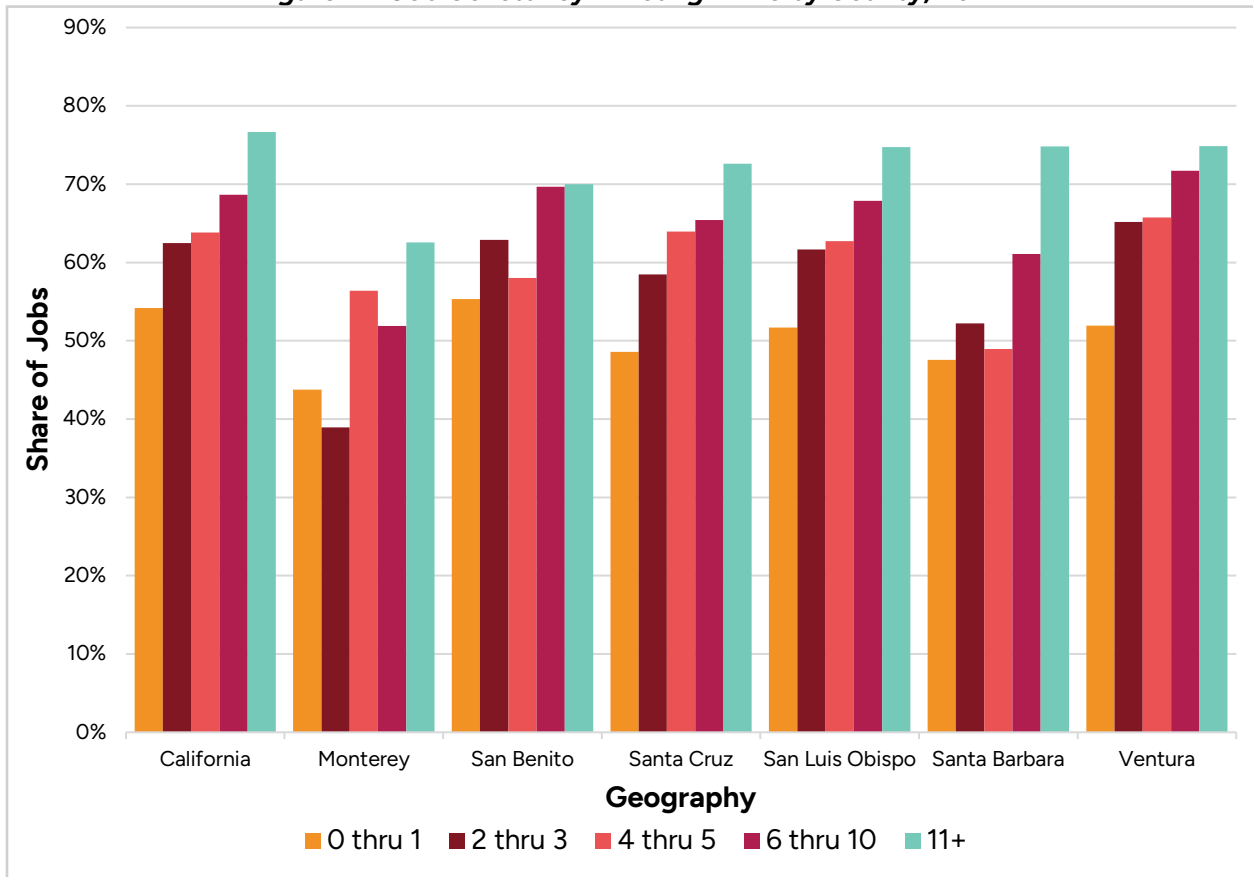


Figure 72: Share of stable jobs held with the same employer for three consecutive quarters at private sector firms of a given age. Source: Analysis of Kauffman Foundation Entrepreneurial Jobs Indicators (2022).

Qualitative input reinforces that communities throughout the Central Coast face entrepreneurship barriers shared by many smaller and mid-sized areas, including capital access, talent, and facilities. In particular, entrepreneurship program providers said, local funders can be risk averse and more likely to support startups in traditional verticals like software, versus hardware-heavy activity and those requiring patient capital and involving longer term return on investment (ROI). Intermediaries also cited the region’s high costs of living as an impediment to the risk-taking inherent to entrepreneurship.

A range of regional and local initiatives exist to support small business development. Entrepreneurship support is a major focus for EDC, which hosts a regional small business development center (SBDC) serving both Ventura and Santa Barbara counties. Ventura stakeholders have also partnered with officials from the Port of Hueneme, regional naval installations, and others to organize a public-private technology-based collaborative, FATHOMWERX, to spur innovation and entrepreneurship around defense and port assets. Other Santa Barbara-centered initiatives include StartUp SB.

In San Luis Obispo, the Cal Poly Center for Innovation and Entrepreneurship provides extensive entrepreneurship supports. These range from incubation of aerospace, agtech, cleantech, medtech, and other knowledge-intensive firms to SBDC supports serving the gamut of startups, Main Street businesses, midsize and scaling businesses with 40 subject matter expert consultants. The City of San Luis Obispo is also promoting access to commercial kitchens and

maker collectives as a means of boosting entrepreneurship among more locally-serving entrepreneurs.

In the North, initiatives include Santa Cruz Works, which launched the Santa Cruz Venture Fund providing acceleration services and early stage funding predominantly to startups focused on cleantech, biotech, and health/wellness. In Watsonville, the El Pajaro Community Development Corporation and Ventures provides equity-focused business coaching, consulting, incubation, and other services, including hosting the region's women's business center. El Pajaro Community Development Corporation (CDC) and Ventures' Familias con Mas received a \$3.4 million California Jobs First pilot implementation grant for entrepreneurship supports including a homecare and climate-focused revolving loan fund and financial education and coaching.

Additional analysis of entrepreneurship and small business needs will be conducted via a series of stakeholder Roundtables during the Uplift strategy phase.

## **7. Regional strengths in innovation are balanced against challenges in other competitive drivers and enablers: talent, infrastructure, and governance.**

Regional economic performance is powered by a handful of competitive drivers—talent, innovation, infrastructure, and governance. Understanding how these drivers function, where they excel, and where they falter will inform development and implementation of an effective and inclusive regional economic strategy.

### **Talent**

More than any other single input, workforce capacity and capabilities are essential for regional economic development. The strength of the available workforce and the ease in preparing future workers are the top factors driving industry cluster formation and business location decisions. Places with higher levels of educational attainment and a larger pool of skilled workers tend to have stronger regional economies, healthier companies, and residents with greater economic mobility.

Firms and business intermediaries report that access to talent – spanning both high-skill and mid-skill roles – is a predominant barrier to success in the Central Coast. While sufficient technical science, technology, engineering, and math (STEM) talent, in particular, is often a challenge for regions, talent access in the Central Coast is deeply intertwined with the region's extraordinary affordability challenges. One employer reported that for every ten external candidates their firm would like to hire, two accept offers, in large part due to costs of living. In other cases, residents commute long distances to Silicon Valley to accrue higher wages to support quality of life. Within the Central Coast itself, residents often travel from more affordable locations to employment centers (e.g., Santa Maria into San Luis Obispo, Ventura County into Santa Barbara) for work.

To account for artificially high labor costs, firms must invest in more extensive recruitment, grapple with lower retention, and offer higher salaries, altogether making it more difficult to scale in the region. Several employers in the Santa Barbara and San Luis Obispo area described shifting positions that can be performed remotely to other U.S. regions due to talent costs and availability.

In addition to reinforcing the imperative to address regional cost of living, these dynamics illuminate the potential to upskill and connect local residents – who are less likely to leave – to these tradable industries that offer quality jobs.

See section “Empowering workers to access economic mobility” for more on talent and workforce dynamics.

## Innovation

A region’s innovation capacity represents its ability to develop new products and services, improve existing offerings, start new businesses, improve productivity, and adapt to rapid technological change. The most diversified (and thus most competitive) regional economies have solid assets in four key areas: research and development (R&D), commercialization, entrepreneurial dynamism, and advanced industrial production.

Research leveraged a number of proprietary databases, including Pitchbook, Cambia’s The Lens, and Clarivate’s Web of Science, to assess regional research and innovation strengths spanning basic, applied, and translational research, along with venture capital funding. Specific research measures include peer-reviewed articles and patents.

Analysis shows that innovation is a core strength for the Central Coast, with the region boasting extremely sophisticated innovation assets that make it an R&D powerhouse within the U.S. and around the world. Specific strengths include autonomous systems, computing, and biotech, with myriad applications through industry. Underlying disciplines showing particular strength include engineering, technology, ocean and earth sciences, and physics. This contrasts with many U.S. regions that typically see research and innovation largely focused on health.<sup>174</sup>

Researchers in the region published over 78,000 peer-reviewed articles from 2013 through 2022. Those articles had garnered 2.6 million scholarly citations by the summer of 2023. Some 24,000, or 30 percent of those articles, contain translational research, meaning they had a direct link to a commercial organization or outcome (see Figure 74).<sup>175</sup>

Different types of organizations drove research output in different counties. The University of California Santa Barbara and University of California Santa Cruz led overall research production. Universities drove most research output in Santa Barbara, Santa Cruz, and San Luis Obispo counties. The U.S. Navy or its Naval Postgraduate School, and the Monterey Bay Aquarium drove research in Monterey County. Companies, namely Amgen, drove research in Ventura County.<sup>176</sup>

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<sup>174</sup> Brookings / Cities GPS analysis of Clarivate Web of Science and Lens.org data.

<sup>175</sup> Brookings / Cities GPS analysis of Clarivate Web of Science and Lens.org data.

<sup>176</sup> Brookings / Cities GPS analysis of Clarivate Web of Science and Lens.org data.

**Figure 73: Translational Research Articles Produced by County, 2012-2022**

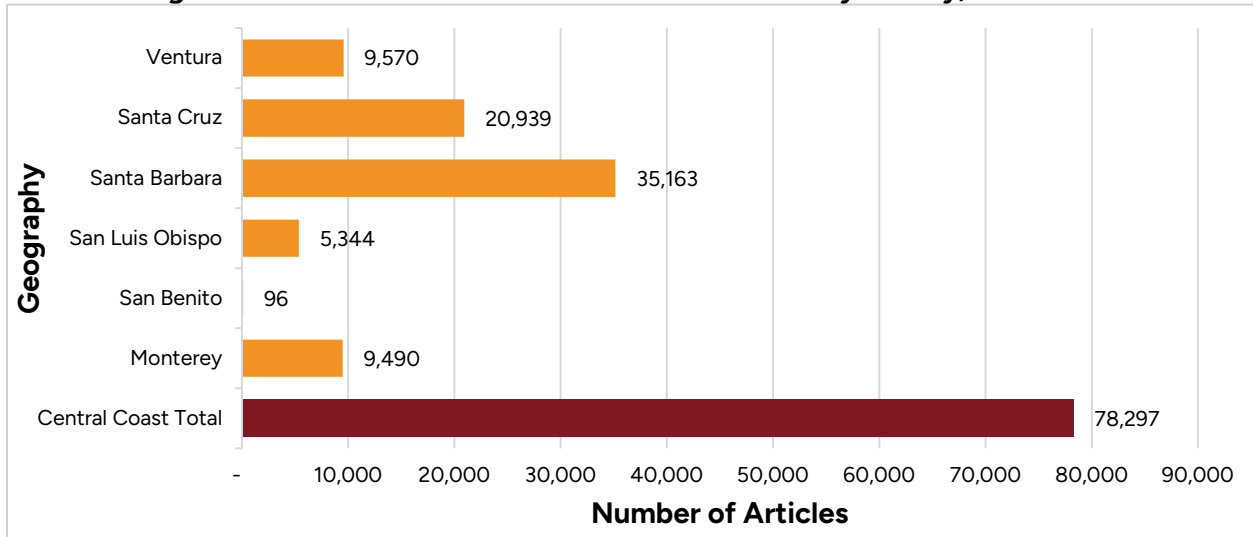


Figure 73: Translational research articles produced by county, 2013-2022. Source: Brookings / Cities GPS analysis of Clarivate Web of Science and Lens.org data.

Specific strengths also vary by county. Research and innovation in Santa Barbara is tilted towards physical sciences and engineering, while Monterey County is stronger in life and earth sciences, and Ventura is stronger in biomedical and health sciences.<sup>177</sup>

Within the Central Coast, innovation assets are predominantly concentrated in Thousand Oaks, Santa Barbara, San Luis Obispo, Monterey, and Santa Cruz. The Port of Hueneme and adjacent naval installations in Ventura County also contain significant innovation activity; their scale is not evident in public data due to the classified nature of some work. Innovation hubs are integral assets that can power high-road growth and prosperity strategies, but access to resources and expertise is limited by geography. Though emblematic of challenges in many smaller and rural areas, this suggests more may need to be done to intentionally bridge these connections.

Innovation assets reinforce industry strengths and lay groundwork for emerging opportunities, such as the blue economy in Monterey and Santa Cruz. They provide a critical input to filtering of industry cluster opportunities (see section “Adding it Up: Cluster Opportunities”).

Additional analysis of research and innovation assets can be found in the Uplift Databook.

<sup>177</sup> Brookings / Cities GPS analysis of Clarivate Web of Science and Lens.org data.

## Infrastructure

Transportation accessibility and efficiency, broadband connectivity, power grid investments, and land use policies all affect how well a regional economy functions. As the climate crisis becomes more acute, infrastructure will also play a growing role in climate adaptation, particularly with regard to decarbonization, electrification, and public transit. When infrastructure is thoughtfully designed and well-maintained, regional economies see improvements in quality of life, productivity, and access to skilled workers.

The Central Coast faces multiple infrastructure issues due to its significantly rural footprint, local land use decisions, and climate impacts.

### Transportation Infrastructure

In multiple counties, insufficient highway capacity encumbers flows of residents, workers, and goods. In Monterey and Santa Cruz counties, perishable high-value agricultural goods with short shelf-lives, such as berries and lettuces, are trucked out of the region on congested two-lane sections of Highways 1 and 156. Highways 25 and 156 are also impacted in and near San Benito, creating snarling travel for the large share of residents commuting to San Jose and the Bay Area. Highway 101 near the San Luis Obispo and Santa Barbara border is also increasingly stressed with workers commuting from cheaper Santa Maria housing to San Luis Obispo jobs. Anecdotally, planning and land use experts report that San Luis Obispo firms find it challenging to build new facilities there due to lacking highway capacity. Widening roadways is difficult due to high costs and state requirements to meet greenhouse gas (GHG) emission reduction targets, reflecting trade-offs between different economic and environmental considerations.

Transportation infrastructure in the region is further impacted by climate and extreme weather events. Areas in Santa Cruz and Monterey counties, such as around Elkhorn Slough Bridge, have seen significant flooding, drainage, and sea level rise, both restricting access and contributing to deterioration of infrastructure. In Santa Barbara, rail access along the coast is similarly vulnerable. Ironically, adoption of some climate-friendly measures will likely further strain transportation infrastructure, for instance through higher weight load for electric trucks.

In multiple counties, local land use decisions have made it difficult for communities to invest in needed improvements serving both residents and industries. "Self-help" transportation sales tax measures have failed in the past decade in both Ventura and San Luis Obispo Counties, depriving officials of a crucial revenue source to both support investments and provide the required cost share for many state and federal infrastructure funding opportunities. The

**"We need more reliable public transportation because sometimes the buses here don't respect the schedules and we are left behind waiting. We need bus services to where the jobs are at where they pay more, and bus services to access clinics and hospitals for medical needs."**

Listening Session in Ventura focused on Outdoor workers, farmers, producers, Spanish Speakers, and Mixtec speakers





impacts of these measures extend beyond roads, including encumbering build-out of water and wastewater infrastructure required for new housing development.

### **Power / Electricity**

Insufficient access to reliable power is an impediment to both economic development and climate objectives, particularly in rural areas. In San Benito, for instance, insufficient substation capacity poses barriers to business attraction and retention, complicating efforts to grow more local jobs to reduce resident commuting. Insufficient or unreliable electricity access (e.g., due to wildfire prompted shut offs) also encumbers core clean energy priorities, such as deployment of electric vehicle charging infrastructure and electrification of homes to reduce the health impacts of natural gas exposure.

#### — Areas for Further Exploration —

- Housing (included in section “Understanding the Central Coast”)
- Water/sewer infrastructure

### **Governance**

Good governance requires a recognition of the wide range of stakeholders implicated in economic development paired with deliberate efforts to engage those stakeholders in identifying opportunities, resolving challenges, and charting a course for the regional economy.

Inclusive regional economic development requires collective action that stretches across organizations and political boundaries. Making the most of major competitive assets such as business networks, K-14 and institutions of higher education, workforce development systems, and public infrastructure requires each actor to work in close coordination to bring a shared economic vision to life. At its best, this kind of collaboration yields benefits that are much greater than the sum of its parts.

A review of 66 Central Coast strategic plans and reports published in recent years provides insight into how various actors in the region are approaching the work of economic development. These publications shed light on how different groups understand the key strengths and challenges of the area economy and how they are organizing themselves for action.

Most Central Coast strategies prioritize high-wage, innovation-intensive industries with growth potential (e.g., aerospace / defense, biotech, agtech, cleantech, information and communication technology). However, many strategies also emphasize historically strong industries that employ large numbers of local workers, such as agriculture, tourism, and hospitality / retail. Although these low-wage industries have long been central to area economies, they are much less likely to produce high-value growth and quality jobs.

The three organizations managing the Central Coast California Jobs First effort - EDC, MBEP, and REACH - exist to support economic development within particular sub-regions. Their work together on California Jobs First reflects an appreciation of the importance of regional collaboration while also maintaining focus on specific sub-regional concerns.

Despite these assets, regional culture and practices pose constraints for achieving inclusive economic development. Multiple stakeholders representing different parts of the region credited “anti-growth” sentiment with encumbering housing construction, infrastructure improvements, industry development potentially offering better jobs for residents, and establishment of mainstream economic development capacities at sufficient scale for impact. Such action – including preventing expansion of housing supply or voting down transportation sales taxes – ultimately degrades communities’ ability to provide broadly-shared opportunity, sustain competitive industries, and provide basic services.

#### — Challenges and Limitations of this Section —

- County-level data can obscure variations in economic trends between different cities, communities, and neighborhoods.
- Reviewers requested data on commuting patterns from the Central Coast to nearby regions (Los Angeles, San Jose, San Francisco).
- Entrepreneurship data disaggregated by race / ethnicity is limited or unavailable.
- Additional engagement with entrepreneurs and small business owners can enhance Uplift’s understanding of challenges and opportunities.



# Empowering Workers to Access Economic Mobility

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— Goals of this Section —

- Offer insights on how to better connect workers to quality jobs.
- Acknowledge fundamental roles of workforce and education providers in improving residents' economic mobility.

— Top-Level Themes —

- Struggling workers possess many human capital attributes required for quality jobs, offering pathways to economic mobility.
  - Education and training programs offer a strong foundation for connecting residents to quality jobs.
  - Support services, such as language access, are required to help improve economic mobility for disconnected populations.
- 

## Empowering Workers to Access Economic Mobility

Boosting quality job creation is only part of equitable economic development. Regions also need to make sure that area residents can access quality jobs through training, education, policy action, and reducing barriers like those described in section “Understanding the Central Coast” (see sidebar “Four pathways to better jobs”).

Such interventions should take into consideration the concerns, priorities, and needs of different demographics of potential workers, with particular attention to historically underrepresented populations. Targeted outreach and career development programming that is designed for specific communities will prove more effective at extending economic mobility to those who have been too often bypassed by the benefits of economic development. Alongside critical educational, workforce, and nonprofit leadership, business and economic development engagement is also necessary to ensure that education and training connects to demanded occupations, incorporates work-based learning, and ultimately leads to positive employment outcomes.

## Four Pathways to Better Jobs

Practice shows that regions can increase their share of better jobs in four ways, which are not mutually exclusive.

- **Job Creation** – focusing economic development efforts towards boosting the total number of quality jobs in a region.
- **Worker Empowerment** – closing skill gaps and removing other barriers that prevent workers from accessing quality jobs.
- **Government Policy and Regulation** – codifying practices and standards for job quality (e.g., scheduling stability).
- **Costs of Living** – reducing the overall burden of regional expenses, allowing wages to go further.

Source: Brookings / Cities GPS

Quantitative and qualitative analysis of the Central Coast labor market reveals that:

### 1. Struggling workers possess many human capital attributes required for quality jobs, offering pathways to economic mobility.

Analysis reveals that struggling workers – those currently not making a wage enabling self-sufficiency – possess many of the skills, knowledge, and abilities to fill quality jobs. The gap between these levels and the ultimate requirements of a given industry or occupation provide a foundation for workforce and education leaders to direct focus for training.

In this analysis, human capital is assessed according to three domains, considering a total of 120 attributes:

- **Abilities**, which are typically innate characteristics, such as originality, visualization, and perceptual speed.
- **Skills**, such as installation, programming, and complex problem solving.
- **Knowledge**, such as engineering and technology, economics and accounting, and physics.

Data indicates that technical knowledge and skills are more important in quality jobs than other jobs. Human capital components of higher relative importance for quality job holders also vary by educational level.<sup>178</sup>

- For those with less than a high school diploma, top attributes include operations analysis, technology design, science, and programming, personnel and human resources, and installation.
- For those holding a high school diploma or GED, top attributes include installation, operations analysis, science, programming, and technology design, equipment selection, and repairing.

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<sup>178</sup> Brookings / Cities GPS analysis of O\*NET data, American Community Survey public-use microdata sample 1-year estimates, and Lightcast estimates.

- For some college or certificate recipients, top attributes include installation, repairing, equipment maintenance, equipment selection, and abilities such as night vision, glare sensitivity, and sound localization.
- For associate's degree holders, top attributes include equipment selection, installation, science, equipment maintenance, repairing, and programming.
- For bachelor's degree holders, top attributes also include installation, equipment selection, programming, management of financial resources, science, operations analysis, and knowledge of engineering and technology.

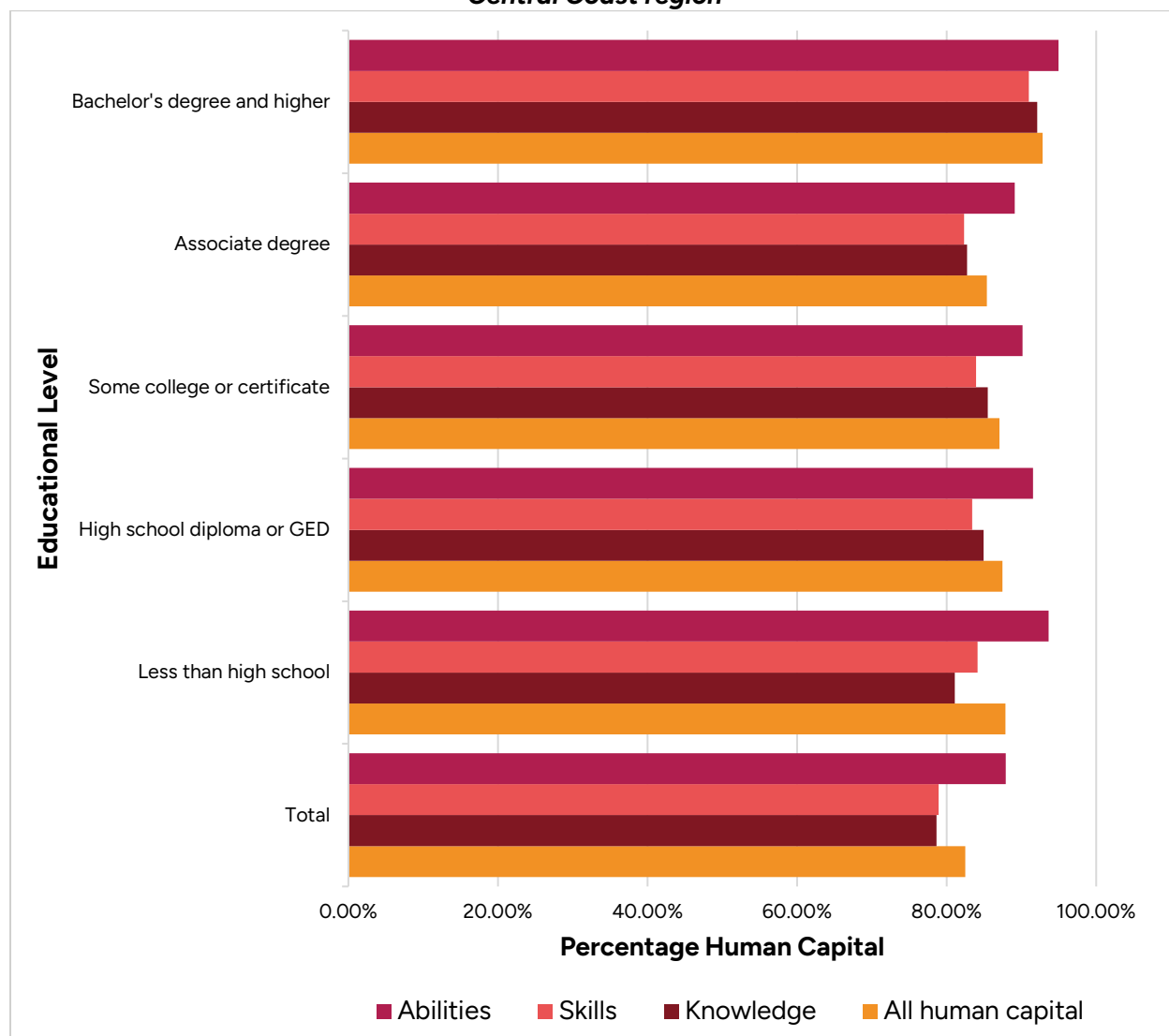
Struggling workers across the Central Coast possess 82.49 percent of the human capital attributes required for quality jobs (Figure 74). However, proficiency varies between domains; struggling workers possess 87.9 percent of demanded abilities, versus only 78.6 percent of knowledge and 78.9 percent of skills. Proficiency also varies by education; reflecting their generally higher level of human capital attainment, struggling bachelor's degree holders possess 92.8 percent of demanded attributes, well above the average for struggling workers.<sup>179</sup>

While closing these gaps is a substantial task and the region still lacks enough total quality jobs for all workers, this data reinforces that the region has pathways to improve economic mobility given appropriate training and education opportunities.

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<sup>179</sup> Brookings / Cities GPS analysis of O\*NET data, American Community Survey public-use microdata sample 1-year estimates, and Lightcast estimates.

**Figure 74: Average Human Capital Overlap Between Struggling Workers and Quality Jobs in the Central Coast region**



*Figure 74: Average human capital overlap between struggling workers and quality jobs in the Uplift region. Source: Brookings / Cities GPS analysis of O\*NET data, American Community Survey public-use microdata sample 1-year estimates, and Lightcast estimates.*

## 2. Education and training programs offer a strong foundation for connecting residents to quality jobs.

The Central Coast boasts a range of two and four-year institutions, spanning research universities to community colleges (Figure 75). Workforce boards, K-12 systems, and other shorter-term talent providers (e.g., SLO Partners in San Luis Obispo) also play fundamental roles in building talent pipelines and connecting workers to jobs.

**Figure 75: Postsecondary Institutions in the Central Coast Region**

County	Postsecondary Institutions
Santa Cruz County	<ul style="list-style-type: none"> <li>• University of California, Santa Cruz</li> <li>• Cabrillo College</li> <li>• CET – Watsonville</li> <li>• Cosmo Factory Cosmetology Academy</li> </ul>
Monterey County	<ul style="list-style-type: none"> <li>• California State University-Monterey Bay</li> <li>• Middlebury Institute of International Studies at Monterey</li> <li>• Monterey Peninsula College</li> <li>• Hartnell College</li> <li>• Central Coast College</li> <li>• CET – Soledad</li> <li>• CET – Salinas</li> <li>• Wayne’s College of Beauty</li> </ul>
San Benito County	<ul style="list-style-type: none"> <li>• Gavilan College</li> </ul>
San Luis Obispo County	<ul style="list-style-type: none"> <li>• California Polytechnic State University – San Luis Obispo</li> <li>• Cuesta College</li> <li>• Laurus College</li> <li>• Central California School of Continuing Education</li> <li>• San Joaquin Valley College – Atascadero</li> <li>• Design’s School of Cosmetology</li> </ul>
Santa Barbara County	<ul style="list-style-type: none"> <li>• University of California, Santa Barbara</li> <li>• Antioch University – Santa Barbara</li> <li>• Westmont College</li> <li>• Santa Barbara City College</li> <li>• Allan Hancock College</li> <li>• Fielding Graduate University</li> <li>• A.T. Still University-College for Healthy Communities</li> <li>• Santa Barbara Business College – Santa Maria</li> <li>• CET – Santa Maria</li> <li>• San Joaquin Valley College – Santa Maria</li> <li>• International Sports Sciences Association</li> </ul>
Ventura County	<ul style="list-style-type: none"> <li>• California State University-Channel Islands</li> <li>• California Lutheran University</li> <li>• Thomas Aquinas College</li> <li>• Moorpark College</li> <li>• Oxnard College</li> <li>• Ventura College</li> <li>• CET – Oxnard</li> <li>• Lu Ross Academy</li> <li>• Modern Beauty Academy</li> </ul>

Figure 75: Two and Four-Year Educational Institutions in the Central Coast Region.



Review of the degrees and credentials produced by regional higher education institutions vis-à-vis the talent demands of quality jobs in the region shows that the Central Coast has a strong base for preparing workers for better-paying jobs. Analysis finds that:

- The region's public, private not-for-profit, and private for-profit institutions play different roles in providing degrees and credentials. 73.1 percent of completed degrees at private not-for-profit institutions are bachelor's degrees. Public institutions, meanwhile, are more evenly weighted between bachelor's degrees (42.1 percent of completions), associate's degrees (34.8 percent of completions), and certificates (23.1 percent of completions). Private for-profit institutions largely provide certificates (70.7 percent of completions) and associate's degrees (26.2 percent of completions).<sup>180</sup>
- Degrees and certificates earned by students in the region's public universities, in particular, align with the skills demanded by quality and promising jobs in the region (see Figure 76). Certificate programs offered by public universities show particular promise in connecting students to quality and promising jobs.<sup>181</sup> This suggests both that the region has a strong base of workers that can be connected to such jobs and existing programs to which more residents could be steered to improve their access.<sup>182</sup>
- Notably, degrees and certificates earned by students in private for-profit institutions align less closely with skills demanded by quality and promising jobs in the region. This may point to the need for greater support services and counseling in advising prospective entrants of these institutions on program outcomes and career options. This likely also reflects the need to upgrade important jobs (like healthcare positions) for which students are being prepared.
- STEM fields are disproportionately represented in degree programs preparing students for good and promising jobs. These range from computer and information sciences and electrical and electronics engineering at the bachelor's degree level, to computer programming and water quality and wastewater treatment at the associate's degree.<sup>183</sup>

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<sup>180</sup> Brookings / Cities GPS analysis of IPEDS data and ACS microdata.

<sup>181</sup> 49 percent of certificates completed at a public institution prepare students for a quality or promising job, compared to 31 percent at private non-profit institutions and 13 percent at private for-profit institutions.

<sup>182</sup> Brookings / Cities GPS analysis of IPEDS data and ACS microdata.

<sup>183</sup> Brookings / Cities GPS analysis of IPEDS data and ACS microdata.

**Figure 76: Estimated Share of Graduates Who have a Quality Job by Institution Type for the Central Coast Region Institutions, 2018-2022**

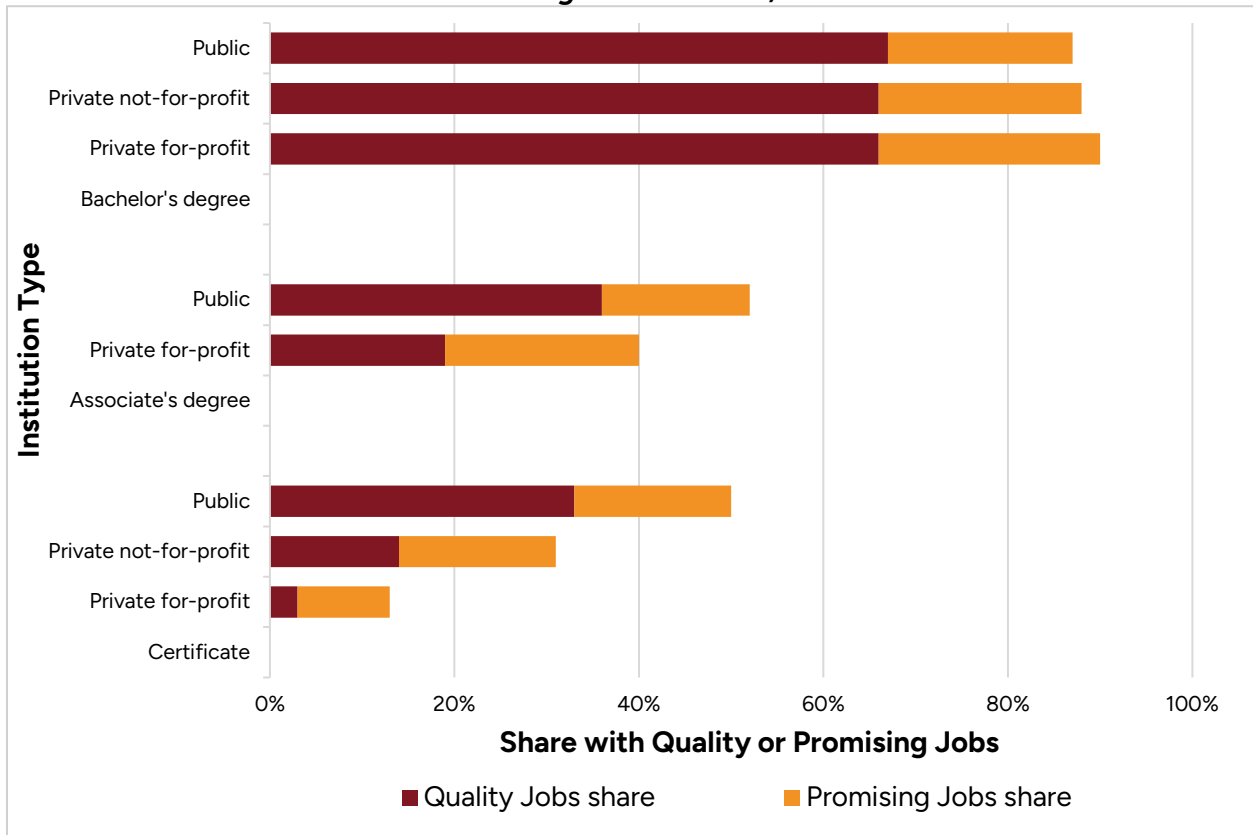


Figure 76: Estimated share of graduates who have a quality or promising job by institution type and degree level from Uplift region institutions from 2018 — 2022. Source: Brookings and Cities GPS analysis of IPEDS data and ACS microdata.

These strengths do not mean there is no room to bolster efforts, however. In most regions, talent systems grapple with a series of fundamental coordination gaps and tensions, including:

- Meeting employer demand versus pursuing institutional and/or faculty priorities. In many cases, employers struggle to provide clear input to drive workforce and education responses.
- Preparing workers for jobs in industries with current consistent demand (e.g., healthcare), versus emerging industries.
- Placing workers in jobs offering higher wages and other benefits, versus ensuring workers are generally employed.
- Balancing student ability to afford high tuition costs and the long-term consequences of debt with the labor market benefits of a degree.
- Guiding students towards higher-paying careers, versus pursuing passions that may not translate to self-sufficiency wages.
- Serving incumbent or older workers in need of new skills and retraining, versus younger, traditional students.

Engagement with educational, workforce, and business interests affirmed that many of these tensions are at play in the Central Coast, alongside innovative efforts and commitments to both support worker economic mobility and provide reliable talent pipelines for firms. These

include efforts by the Ventura Community College District to organize industry leaders to provide real-time data and input to guide program prioritization and development, versus relying on more generic labor market information data. In Salinas, Hartnell College has developed mechatronics and advanced automotive technology career and technical education programs to prepare residents for the transition from farm working to agriculture technology deployment. Allan Hancock College in Santa Maria has built out demand-driven STEM programs in parallel with focusing on culturally responsive curriculum to improve access. CSU Channel Islands is deepening its focus on market-responsive “extended university” offerings. Institutions such as UC Santa Barbara, UC Santa Cruz, and Cal Poly are reliable providers of tech, engineering, and other high-skill talent.

Alongside traditional degree programs, regional institutions have also partnered with business, philanthropy, community groups, and others to advance shorter-term training directly preparing workers for better jobs.<sup>184</sup> These types of programs may be particularly effective for helping workers already in the labor market upgrade skills for adjacent opportunities offering better job quality. For instance, one business leader affirmed that farmworkers, seamstresses, and other workers with proven attention to detail are often successful in transferring to technical manufacturing work.

Programs underway on the Central Coast include a Monterey-based Advanced Manufacturing Apprenticeship Program (AMAP) pilot seeded by the Irvine Foundation, working with Joby Aviation, CSU–Monterey Bay, and the Monterey Bay Drone, Automation, and Robotics Technology (DART) Initiative. This program trains composite fabrication, aircraft assembly, and equipment maintenance technicians for positions at Joby. Partnerships with community-based organizations help with pipeline development. Other efforts include an under-development Santa Barbara Advanced Manufacturing Upskilling Network, organized by the Santa Barbara South Coast Chamber with UC Santa Barbara, Santa Barbara City College, Allan Hancock College, and several leading firms. This program will help upskill workers, including in lower-paying hospitality and agriculture fields, for higher-paying clean room manufacturing technician roles. While these types of programs will ultimately need to reach greater scale (the AMAP program has produced 30 technicians to date), they provide a base for more demand-driven strategies to upskill workers for better jobs.

### **3. Support services are required to help improve economic mobility for disconnected populations.**

Attaining a degree or credential is not necessarily straightforward. The costs of higher education have made four-year degrees increasingly inaccessible. At the community college level, within six years, only about 40 percent of students across the country graduate.<sup>185</sup> Barriers to success range from tuition costs to unexpected fees, limited affordable childcare, lacking transit access, food insecurity, and homelessness.

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<sup>184</sup> In one example, Communities Organized for Relational Power in Action (COPA) in Monterey and Santa Cruz Counties has worked to scale Project QUEST, an evidence-based workforce model originated in San Antonio, TX, to the region.

<sup>185</sup> Elizabeth Mann Levesque, “Improving community college completion rates by addressing structural and motivational barriers,” Brookings, October 2018, <https://www.brookings.edu/articles/community-college-completion-rates-structural-and-motivational-barriers/>.

Education and workforce providers in the Central Coast affirmed the relevance of these barriers for local students and workers, particularly those who are first-generation, parents, or otherwise non-traditional students. Efforts underway at regional institutions include new first-year support services (addressing a prominent challenge to attendance), modified policies for non-payment of tuition and fees, childcare vouchers, and improvements to advising. Scaling of these programs and policies – plus potentially deeper interventions such as the City University of New York’s proven intensive Accelerated Study in Associate Programs model for support services – will surely be required to help the Central Coast reach goals around improved economic mobility.

“My identity as a white male affords me plenty of opportunities and I don’t have barriers for myself, because I speak the economic development lingo, but for other demographics that would be different (i.e., women, veterans, LGBTQ) who experience those barriers.”

Community Convening in Santa Cruz



— Challenges and Limitations of this Section —

- Reviewers requested information on effective education / training pathway models that could be considered in the region, including detailed design and operational frameworks.
- Reviewers raised the need to understand the impact of the COVID-19 pandemic on rates of young people not in school or working.

# Adding It Up: Cluster Opportunities

— Goals of this Section —

- Define the most compelling industry cluster opportunities for the Central Coast, weighing criteria including industry strength, quality job creation, and environmental sustainability.

— Top-Level Themes —

- A selection of precision manufacturing and advanced business services industries offer the Central Coast the opportunity to boost creation of quality jobs, including those accessible to workers holding less than a bachelor's degree.
- Other large industries, such as agriculture and tourism, do not meet job quality criteria, but can be targeted to improve existing employment opportunities.
- Federal and state policy can be leveraged to advance potential regional cluster strategies.

## Adding It Up: Cluster Opportunities

As described in section “Strengthening Industry to Create Opportunity,” unique industry specializations where regions can claim a “comparative advantage” are critical for maintaining sustainable economic growth amid competition with other U.S. and global regions. These specializations both generate new jobs themselves and power the influx of new resources into regions, which in turn, support local-serving businesses, such as shops, grocery stores, and dentist’s offices.

The analyses throughout this report provide context informing the region’s economic comparative advantages – or “cluster opportunities.” This includes the strengths and challenges of the region’s existing industry base, workforce, educational institutions and other innovation assets, infrastructure, and physical assets. It also includes the risks posed by certain industries to the environment and public health. Crucially, it further considers whether jobs in these industries offer workers wages and other benefits that allow them and their families to make ends meet.

This section takes a two-part approach, adding up and applying these insights to outline industry opportunities for the Central Coast:

1. Identifying a set of regional clusters where analysis shows the region has a comparative advantage for growth and creation of new quality jobs.
2. Listing a set of other large regional clusters that do not meet criteria, but that contain large numbers of jobs and should be targeted for other improvements to offer more quality jobs to local residents.

## Part 1: Regional cluster opportunities for quality job creation

### Methodology

As a first step, building on earlier analyses of industry performance, machine learning methods were applied to large datasets that describe intraregional supply chains and talent demand to define strategic industry cluster opportunities (see Figure 77). This approach revealed groups of industries that belong to the same regional value chain and groups of industries that have common talent needs, which are highly correlated with each other.

**Figure 77: Analysis of Industry Clusters at the Regional Level**



*Figure 77: Please note, figure included to illustrate method, not for review of findings. Analysis examines supply chain and talent attributes to map connections within and between sub-sectors, adding up to clusters. Nodes and lines show these connections.*

As a second step, once clusters were identified, they were further evaluated through a series of criteria (see “Criteria/Lenses for Industry Selection”) reflecting competitiveness in the global economy and alignment with Uplift and California Jobs First values.

### Criteria / Lenses for Industry Selection

- The industry can expand access to quality jobs because it either: concentrates quality jobs for a) all workers, or b) for mid-skilled workers with some college, a certificate, or an associate's degree.
- The industry is tradable and has a high growth multiplier, meaning each job created in the industry leads to another in other industries.
- Public support can be applied effectively because the region already boasts a specialization in the industry or because the industry is growing faster locally than it is nationwide.
- The industry can continue to be competitive given environmental standards and advances California Jobs First's goals of promoting a transition to a low-carbon economy (oil and gas-based industries are excluded; environmental impact of other industries can be remediated to varying degrees).

**This approach was quantitative provides the starting point for understanding the Central Coast's comparative advantages, continuously refined by qualitative inputs and then weighted by community preferences.** By presenting consistent, comparable empirical data at various geographic levels, quantitative reviews help balance aspirations with evidence. However, data may not always capture more nascent industry growth, new industries emerging from cross-disciplinary innovations, or the potential to leverage unique local assets for other purposes. The way data is gathered and organized can also impact results. For instance, individual firms in emerging and converging sectors, such as air mobility, self-report in different industry categories than those of more traditional industries, such as aircraft, aerospace product, or engine, turbine, and power transmission equipment manufacturing, where qualitative input is needed to validate assessments.

**Early qualitative engagement with business intermediaries and firms, plus other cuts at data, have identified some of these opportunities that complement more evident sector strengths.** For example, San Luis Obispo's capabilities in commercial equipment and autonomous systems overlap and contribute to aerospace and defense in Santa Barbara, while both hold long-term potential in cleantech based on offshore wind siting plans. Ventura's efforts around the Port of Hueneme and government research activity at the Naval Warfare Centers raise potential for new cleantech and blue economy innovation, as well as commercialization. As part of its economic diversification agenda, San Benito's infrastructure at Hollister Airport might be leveraged to boost regional scaling of air mobility testing and production centered in Monterey and Santa Cruz counties.

Analysis finds that a moderate number of sectors meet all screening criteria for an equitable, sustainable, and feasible high-road growth strategy (see Figure 78).

**Collectively, these sectors reflect a sophisticated regional specialization in complex instruments and microelectronics.** The focus of these strengths are different across the region. Beneath broad industry categorizations, Monterey and Santa Cruz have particular



assets related to the blue economy, while Santa Barbara and San Luis Obispo see potential in quantum and aerospace. Deeper exploration to refine these areas will be undertaken through strategy-phase industry Roundtables, including opportunities to grow related clusters and opportunities across the Central Coast region.

**Crucially – while these areas encompass cutting-edge tech and innovation activity – they offer jobs for workers with less than a bachelor’s degree. This reflects a preference for helping more local residents move into quality jobs, rather than creating jobs that have to be filled by outsiders.**

**Figure 78: Industries Meeting Criteria for an Equitable, Sustainable, and Feasible High Road Growth Strategy**

	Santa Cruz	Monterey	San Benito	San Luis Obispo	Santa Barbara	Ventura
<b>Precision manufacturing</b>						
Aerospace instruments	Green				Green	Green
Medical devices and pharmaceuticals	Green	Green			Green	Green
Clean tech / blue tech	Green	Green				
Computers / autonomous systems	Green		Green	Green	Green	Green
Commercial / industrial equipment		Green	Green	Green	Green	Green
Aviation, aerospace, and defense	Green	Green			Green	Green
<b>Advanced business services</b>						
Custom computer systems design	Green	Yellow		Yellow	Green	Yellow
Software publishing				Yellow	Green	Yellow
Environmental consulting services	Green	Green		Green	Green	Green
R&D services	Green	Yellow	Green	Green	Green	Green

**Legend**  
 Both significant industry concentration and performance  
 Significant concentration, but with less strong performance

Figure 78: Industries meeting criteria for an equitable, sustainable, and feasible High Road growth strategy by county.

## Part 2: Regional cluster opportunities for upgrading jobs

Meanwhile, other industries – such as agriculture – that do not meet all criteria remain integral to the region’s economy and job base (see Figure 80). While some sub-sectors within these industries do meet criteria around providing quality jobs, the vast majority do not (see Figure 79 examining job quality in healthcare sub-sectors).

**Figure 79: Job Quality in Healthcare Subsectors**

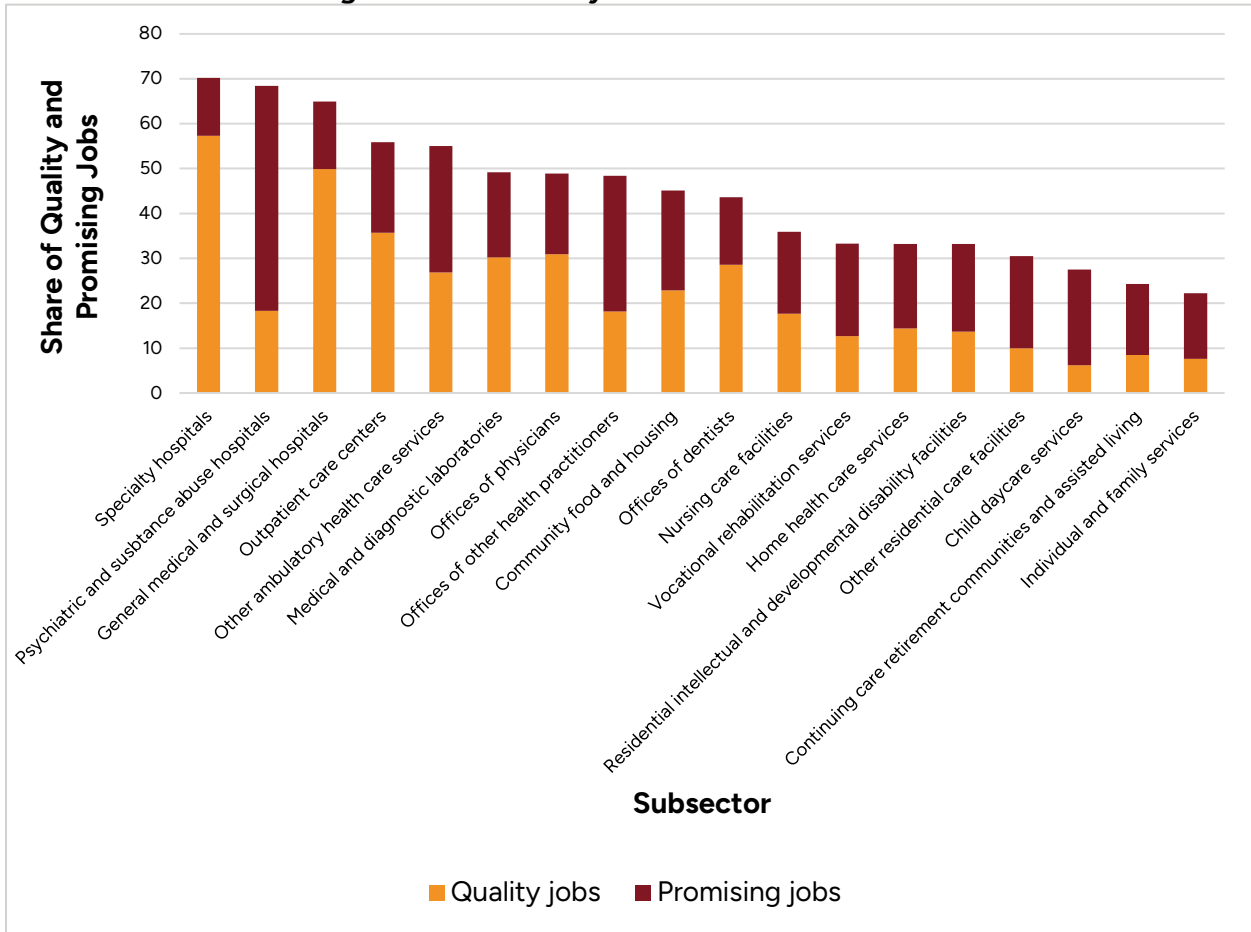


Figure 79: Concentration of quality and promising jobs in Central Coast healthcare subsectors. Source: Brookings / Cities GPS analysis of Lightcast estimates and American Community Survey 1-year public-use microdata sample.

However, many residents work in these industries and improving their quality of life and economic mobility demands upgrading the quality of these jobs.

**Figure 80: Other Dominant Industries Not Meeting Criteria for an Equitable, Sustainable, and Feasible High Road Growth Strategy**

	Santa Cruz	Monterey	San Benito	San Luis Obispo	Santa Barbara	Ventura
<b>Agriculture</b>		X	X	X	X	X
<b>Tourism</b>		X		X	X	
<b>Healthcare</b>	X	X		X	X	X

Figure 80: Other dominant industries that do not meet the criteria by county.

While the potential to upgrade job quality in certain sectors and sub-sectors is likely limited, a range of interventions can be targeted to others. These include:

- Helping firms improve productivity and enable workers to garner higher wages through process innovations (e.g., technology adoption).

- Working with employers to adopt business practices to better support workers (e.g., scheduling stability, improved human resources operations).
- Pursuing intermediary functions or employer collaboratives to provide scale in offering improved benefits (e.g., childcare) to workers.
- Advancing public policy action to "raise the floor" on working conditions.
- Supporting targeted pathways (e.g., training) for workers to transition to jobs with higher job quality.

## Opportunities created by “place-based industrial policy”

Under the Biden-Harris administration and through the 117<sup>th</sup> Congress (2021-2022), the federal government dedicated tens of billions dollars to support investments in industry clusters, infrastructure, clean energy, and related priorities.<sup>186</sup> These investments seek to advance post-COVID long-term competitiveness and supply chain resilience, promote the transition to a clean economy, and support national security amid growing “great power” competition with China and Russia. Legislation includes the American Rescue Plan, Bipartisan Infrastructure Law (BIL), the Creating Helpful Incentives to Produce Semiconductors (CHIPS) and Science Act, and the Inflation Reduction Act (IRA), including significant climate provisions. States, including California, similarly leveraged COVID-era funding and unexpected budget surpluses to support similar initiatives.

Many of these investments directly flow to and support regional economic development stakeholders and strategy, providing a once-in-a-generation influx of public funding. Major federal initiatives include (but are not limited to):

- Build Back Better Regional Challenge, a \$1B competitive program supporting coalitions advancing regional cluster strategies.
- Good Jobs Challenge, a \$500M competitive program to support workforce strategies improving access to good jobs.
- Tech Hubs, a \$500M competitive program to support technology development, innovation, and job creation in regions.
- Innovation Engine Program providing up to \$160M to individual regions to support regional innovation ecosystem activities.
- Regional Clean Hydrogen Hubs, a \$7B program supporting clean energy investments.
- Rebuilding Economies and Creating Opportunities for More People to Excel (RECOMPETE), a \$200M competitive program to support regions closing employment gaps among prime-age (25-54 year-old) workers.

Funding also supports a broad array of other competitive and formula-based infrastructure investments and clean energy programs.

The Central Coast’s industry strengths – such as semiconductors and defense / aerospace – relate directly to Washington’s economic and national security targets for “place-based industrial policy” support. However, reflecting the extremely competitive nature of these programs, which receive hundreds of applications, existing proposals have not been funded. A California hydrogen hub proposal was, however, selected.

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<sup>186</sup> Mark Muro, et al, “Breaking down an \$80 billion surge in place-based industrial policy,” Brookings, December 2022, <https://www.brookings.edu/articles/breaking-down-an-80-billion-surge-in-place-based-industrial-policy/>.

Content of these applications reflects strengths and opportunities that could be realized through California Jobs First or other economic development activity. Examples include:

- A six-county space and aeronautics-focused Build Back Better Regional Challenge application. Collaboration between REACH, EDC, and MBEP on this application led to the Uplift Central Coast California Jobs First coalition.
- Tech Hubs applications focused on advanced air mobility (Monterey/Santa Cruz) and semiconductors / quantum (Santa Barbara/San Luis Obispo).
- An Innovation Engine proposal focused on the “food-energy-water nexus,” leveraging assets in materials science, agriculture and aquaculture.

Separately, regional leads are also pursuing a range of related efforts to leverage federal and state funding, including to support semiconductor development in Santa Barbara and San Luis Obispo counties and offshore wind development around Morro Bay.

### **Impacts of Climate on Industry Opportunities**

- Climate change poses a range of risks for industry growth in the Central Coast, as explored earlier in this report. Significantly impacted industries include large traditional economic anchors targeted for upgrading job quality. Agriculture faces the impact of climate change (e.g., rising temperatures, drought, wildfire smoke and ash) to both production and the well-being of its workers. Hospitality, meanwhile, has also seen interruptions to its operations due to extreme weather events.
- Climate change also creates instability for the ongoing operations and sustainability of a broader range of industries, including the precision manufacturing and advanced business services sectors identified through clusters analysis. Climate impacts reduce the reliability of major regional infrastructure assets, including (but not limited to) the power grid and highways responsible for moving workers and goods. By reducing quality of life, climate change also limits the region’s ability to maintain a competitive workforce required to sustain industry growth.

#### **— Challenges and Limitations of this Section —**

- Emerging industry strengths and nascent industry-building efforts are not always visible in quantitative data.
- Additional engagement with firms in identified industries is required to refine opportunities (industry Roundtables planned for strategy phase).
- This section is not comprehensive of all state and federal funding programs available to support California Jobs First priorities.

# Implications for Strategy Development

— Goals of this Section —

- Offer review of data collected and high-level takeaways from extensive series of analyses.
- Inform transition from research insights to actionable strategies.

— Top-Level Themes —

- Research and community engagement point to the need for ambitious strategies for the Central Coast, addressing both growth and lowering barriers to equity.

## Implications for Strategy Development

This report – like the broader Uplift and California Jobs First initiatives – is ambitious in scope. It explores economic, labor market, and industry cluster dynamics driving growth and prosperity, the interplay between these factors and environment and public health, and community priorities for the future of the Central Coast and the lives of its residents.

Ultimately, this report adds up to a sobering picture of the region’s current state and its trajectory in the decades to come. Over half of residents surveyed in Uplift’s public opinion poll do not see a future for themselves in the Central Coast, despite the region’s strong community, natural beauty, and world-class industries. Unable to access jobs that enable self-sufficiency and beset by unsustainable costs of living (largely attributable to housing), simply too many residents struggle.

These dynamics point to the need for a more innovative economic development strategy for the Central Coast.

First, while economic growth is necessary, it is not alone sufficient. The region must fundamentally improve livability for residents and lower barriers that prevent many from succeeding.

Second, given physical and other constraints to development, the focus of economic growth needs to be highly deliberate. The region must prioritize opportunities to both continue to advance its comparative advantages in the global economy and provide well-paying jobs for local workers, including those without bachelor’s degrees. These filters should inform ongoing public and other investments and strategies.

Implications of this analysis include:

1. **Lowering costs of living and improving well-being for residents must be a major priority for the region.** Pursuing funding, policies, and programs that expand the availability of affordable housing and childcare can make the region more livable, encourage the development of new tradable industries, and ensure existing industries remain competitive.

2. **The region faces significant barriers to growth.** A fundamental reality in the Central Coast is that ecological, political, and economic constraints make it difficult to attract and retain more residents or workers. The resulting high costs create substantial burdens for working families and small businesses.

3. **The region has a path to sustainable, quality job creation, although constraints are real.**

Growth has high opportunity costs, given physical barriers to expansion, which makes the quality of future growth paramount. A handful of industries in advanced manufacturing and advanced business services meet job quality, sustainability, and feasibility standards. The region boasts advantages to grow these industries.

4. **Improving job quality and productivity in other industries, such as**

**agriculture and hospitality, is therefore essential.** Process improvements, new business models, and upskilling the existing workforce are essential to increase wages, especially in labor-intensive sectors like agriculture, food, healthcare, and hospitality. The region has assets that can encourage tech adoption and innovation in these sectors.

5. **The region must improve access to quality job opportunities in new or existing industries through training and lowering other barriers.** The region must expand the pool of residents equipped for quality jobs, both to help more residents achieve economic mobility and to help firms stay and succeed in the Central Coast. This involves both expanded training through greater alignment of economic and workforce development activities and deliberate strategies to reduce racial, gender, geographic, and other disparities.

“No hay futuro aquí porque nos bajaron horas y días de trabajo, ya no trabajamos diez horas, trabajamos ocho horas, cuatro días a la semana. Como mamá tengo que perder días de trabajo por llevar a mis niñas al doctor, y eso es un día que pierdo el sueldo. No me alcanza para comprarle zapatos a las niñas, no me alcanza para la renta, sólo lo básico, y es sólo un cuarto en el que vivo con mis hijas. No nos alcanza para ir un restaurante, a un McDonald's. Desde el año pasado paramos el 21 de octubre de trabajar mi cheque salió de \$340. Desde ahí han bajado horas y los días de trabajo.”

Listening Session with Spanish-speaking Latina women in rural areas

Translation:

“There is no future here because they cut our hours and days of work. We no longer work ten hours, we work eight hours four days a week. As a mother, I have to miss work days to take my girls to the doctor, which is a day that I lose my salary. I can't afford to buy shoes for the girls, I can't afford rent, just the basics, and it's just one room where we live with my daughters. We can't afford to go to a restaurant, a McDonald's. Last year, we stopped working on October 21, and my check came out to \$340. Since then, the hours and days of work have decreased.”



6. **Physical access and proximity are barriers to opportunity for families and businesses.** The Central Coast boasts world-class innovation hubs, universities, and other higher-ed institutions. However, in part due to the region's large geography and rural landscape, many communities that could benefit from these assets are far removed.

## Where Uplift Goes Next

With completion of this report, Uplift will now transition from research to strategy development. This will involve applying empirical data and community insights to inform recommendations on practical strategies and investments to grow a more sustainable, equitable, and inclusive economy.

Strategy inherently involves narrowing focus to a discrete set of opportunity areas where limited time and investment are most likely to deliver the greatest impact. Therefore, Uplift will need to balance tensions between what is realistic versus optimal. While California Jobs First aims to promote long-term investment strategies equipping regions to compete for a range of federal, state, philanthropic, and private funding, initial California Jobs First funds are finite.

The implications of this analysis suggest a wide range of strategies and investments for action. Over the coming months, Uplift will refine these potential focus areas through a community-led approach.



# Annex

## Annex 1: Additional SWOT Analysis



### Strengths

- Strong sense of pride in **community** was listed as the most positive element of living in the Central Coast during several Uplift-hosted community convenings
- Beautiful and tranquil **nature**, including National Parks and a large swath of the Pacific Ocean shoreline, is an asset enjoyed by many Central Coast locals and visitors alike, promoting tourism in the region
- **World-class innovation hubs, universities, and other higher-education institutions** which attract tech startups, top researchers, and college students from around the world
- Agriculture-suitable **weather conditions** making the Central Coast optimal for growing in-demand crops such as grapes, avocados, and garlic
- **Small businesses providing essential services** and add vibrancy to downtowns across the regions
- **Industry strengths in areas core to the modern economy**, including semiconductors, quantum, and clean/blue technology



### Weaknesses

- **High costs of living**, especially housing, leaving one third of residents struggling to make ends meet
- **Insufficient jobs, especially quality jobs**, causing doubts among many residents in their futures in the region
- Seasonal jobs/gig economy causing **low hours and pay**, not providing enough to get by
- Insufficient **affordable, conveniently located childcare, eldercare, and healthcare** deterring workers, particularly working families, from moving to or staying in the region
- **Far distances from key resources**, causing long, expensive, emissions-intensive gas-powered car commutes
- Inconsistent **broadband connectivity**
- From preschool through graduate degrees, **educational attainment is inequitable and varies** greatly by race and ethnicity
- **Regional disconnect between counties**



## Opportunity

- **Grow industries with potential to offer more quality jobs** to workers with less than a bachelor's degree, such as subindustries of precision manufacturing and advanced business services
- **Improve quality and productivity of jobs** in prominent industries such as agriculture, food, healthcare, and hospitality to increase the feasibility of living on the Central Coast
- **Expand training and education through greater alignment of economic and workforce development** activities to increase the pool size and diversity of well qualified students, apprentices, and workers
- Implement **deliberate strategies** to reduce racial, lingual, gender, geographic, and other disparities to advance equity
- Enhance regional **broadband connectivity** to expand access to key information and virtual business and services opportunities
- Increased **public-private partnerships** to foster more collaborative economic development and quality of life efforts



## Threats

- Extreme heat, wildfire, droughts, sea level rise, flooding and other impacts of **climate change** may pose issues for the region's health, safety, and economic prosperity, particularly tied to agriculture and infrastructure access
- **Natural resource** constraints, including the already limited freshwater access is being fought after and along with it, is depleting community financial resources
- **Increasing prices and inflation may exacerbate residents' financial challenges**, potentially driving out or displacing locals who cannot afford to stay in their homes and communities, further exacerbating **gentrification and displacement**
- High rates of **childhood poverty** present a long-term threat to prosperity and growth

## Annex 2: Vision Committee Members

The Vision Committee is composed of ten members with representation across all 12 California Jobs First constituencies (as of December 19, 2023).



### **ANA ROSA RIZO-CENTINO**

*Central Coast Climate Justice Network*

**Serving the Counties of Santa Barbara, San Luis Obispo, Ventura**

Representing Grassroots and Community-Based Organizations;  
Environmental Justice Organizations; Disinvested Communities



### **ANDREA CARLOS WILLY**

*Pajaro Valley Unified School District (PVUSD)*

**Serving the Counties of Monterey, Santa Cruz**

Representing Grassroots and Community-Based Organizations;  
Disinvested Communities; Education and Training Providers



### **CESAR LARA**

*Monterey Bay Central Labor Council*

**Serving the Counties of Santa Cruz, Monterey, San Benito**

Representing Labor Organizations; Grassroots and Community-  
Based Organizations



### **CHRISTINE ROBERTSON**

*San Luis Coastal Education Foundation*

**Serving the County of San Luis Obispo**

Representing Education and Training Providers



### **DIRRICK WILLIAMS**

*Black Leaders and Allies Collaborative (BLAAC)*

**Serving the County of Monterey**

Representing Grassroots and Community-Based Organizations;  
Environmental Justice Organizations; Disinvested Communities;  
Worker Centers



### **GARRETT WONG**

*County of Santa Barbara*

#### **Serving the Counties of San Luis Obispo, Santa Barbara, Ventura**

Representing Environmental Justice Organizations; Disinvested Communities; Government Agencies



### **KATHY ODELL**

*Women's Economic Ventures (WEV)*

#### **Serving the Counties of Santa Barbara, Ventura**

Representing Economic Development Agencies; Employers, Businesses, and Business Associations; Grassroots and Community-Based Organizations; Education and Training Providers; Disinvested Communities



### **LAWRENCE (LARRY) SAMUELS**

*University of California Santa Cruz*

#### **Serving the Counties of Monterey, Santa Cruz**

Representing Employers, Businesses, and Business Associations; Education and Training Providers



### **ROSA VIVIAN FERNANDEZ**

*San Benito Health Foundation (SBHF)*

#### **Serving the County of San Benito**

Representing Employers, Businesses, and Business Associations; Disinvested Communities; Grassroots and Community-Based Organizations



### **SAM COHEN**

*Santa Ynez Band of Chumash Indians*

#### **Serving the County of Santa Barbara**

Representing California Native American Tribes

## Annex 3: Regional Steering Committee Members

### Northern Sub-Regional Steering Committee Members

The Northern Steering Committee is composed of 11 members with representation across all 12 California Jobs First constituencies (as of December 22, 2023).

#### Northern Subregion



#### **ALMA CERVANTES**

*Building Healthy Communities-Monterey County (BHC)*

**Serving the County of Monterey**

Representing Workforce Entities



#### **DIANE ORTIZ**

*Youth Alliance*

**Serving the County of San Benito**

Representing Worker Centers



#### **ELOY ORTIZ**

*Regeneración-Pajaro Valley Climate Action; Center for Farmworker Families*

**Serving the Counties of Monterey, Santa Cruz**

Representing Environmental Justice Organizations



#### **ENRIQUE ARREOLA**

*San Benito County Health and Human Services Agency; California Workforce Association*

**Serving the County of San Benito**

Representing Government Agencies



**FRANCISCO RODRIGUEZ**

*Monterey Bay Central Labor Council*

**Serving the Counties of Santa Cruz, Monterey**

Representing Labor Organizations



**GABRIELA LOPEZ CHAVEZ**

*Loaves, Fishes & Computers, Inc. (LFC); Salinas Inclusive Economic Development Initiative (SIEDI)*

**Serving the Counties of Santa Cruz, Monterey, San Benito**

Representing Grassroots and Community-Based Organizations



**JACKIE CRUZ**

*Hartnell Community College*

**Serving the County of Monterey**

Representing Education and Training Providers



**KRISTINA CHAVEZ WYATT**

*California Manufacturing Technology Consulting (CMTC, NIST MEP Center); San Benito County Business Council; Farmhouse Communications*

**Serving the County of San Benito**

Representing Employers, Businesses, and Business Associations



**MARIA ELENA MANZO**

*Mujeres en Acción*

**Serving the County of Monterey**

Representing Disinvested Communities



**MICHAEL CASTRO**

*Community Foundation for Monterey County; Salinas Inclusive Development Initiative (SIEDI)*

**Serving the County of Monterey**

Representing Philanthropic Organizations



**RICHARD VAUGHN**

*County of Monterey*

**Serving the County of Monterey**

Representing Economic Development Agencies



## Southern Sub-Regional Steering Committee Members

The Southern Steering Committee is composed of 12 members with representation across all 12 California Jobs First constituencies (as of December 22, 2023).

### Southern Subregion



#### CAMERON GRAY

*Climate Mitigation for the Community Environmental Council (CEC)*

**Serving the Counties of San Luis Obispo, Santa Barbara, Ventura**

Representing Grassroots and Community-Based Organizations



#### CORLEI PRIETO

*Santa Barbara Adult Education Consortium (Santa Barbara City College)*

**Serving the Counties of San Luis Obispo, Santa Barbara, Ventura**

Representing Workforce Entities



#### DENISE EL AMIN

*NAACP Executive Committee; Santa Barbara County*

**Serving the County of Santa Barbara**

Representing Disinvested Communities



#### JEREMY GOLDBERG

*Central Coast Labor Council*

**Serving the Counties of San Luis Obispo, Santa Barbara, Ventura**

Representing Labor Organizations



#### JOYCE HOWERTON

*City of Lompoc; Santa Barbara County Action Network*

**Serving the County of Santa Barbara**

Representing Government Agencies



**MICHAEL BOYER**

*Boys & Girls Clubs of Mid Central Coast; Diversity Coalition San Luis Obispo County; San Luis Obispo Chamber of Commerce*

**Serving the Counties of San Luis Obispo, Santa Barbara**

Representing Employers, Businesses, and Business Associations



**NICKI PARR**

*Women's Economic Ventures (WEV)*

**Serving the Counties of Santa Barbara, Ventura**

Representing Economic Development Agencies



**REBECCA EVANS**

*Workforce Development Board of Ventura County (WDBVC)*

**Serving the County of Ventura**

Representing Worker Centers



**RITA CASAVERDE**

*Diversity Coalition San Luis Obispo County; SLO County UndocuSupport; SLO County Climate Justice Alliance*

**Serving the County of San Luis Obispo**

Representing Environmental Justice Organizations



**SCOTT LATHROP**

*ytt Northern Chumash Nonprofit*

**Serving the County of San Luis Obispo**

Representing California Native American Tribes



**VANESSA BECHTEL**

*Ventura County Community Foundation*

**Serving the County of Ventura**

Representing Philanthropic Organizations



**WENDY SIMS-MOTEN**

*First 5 Santa Barbara County*

**Serving the County of Santa Barbara**

Representing Education and Training Providers

## Annex 4: Stakeholder Mapping Lists

**Table 4A: Actively Engaged Stakeholders<sup>187</sup>**

The below table lists the 229 actively engaged stakeholders<sup>188</sup> who represent all 12 California Jobs First constituencies.

Stakeholder Name	County	Organization Type	Engagement Type	Awareness
Action Council of Monterey County	Monterey	Grassroots and Community-Based Organizations	July 2022 Letter of Support; September 2023 CBO Grant Recipient	4
Allan Hancock College	Santa Barbara	Education and Training Providers	July 2022 Letter of Support	1
Amah Mutsun Tribal Band	Santa Cruz	California Native American Tribes	Committee Member Representation	4
Association of Monterey Bay Area Governments (AMBAG)	Monterey, Santa Cruz	Government Agencies	July 2022 Letter of Support; Completed interview with Brookings	3
Awakening Giantz	Santa Barbara	Disinvested Communities	September 2023 CBO Grant Applicant	1
Big Brothers Big Sisters of Monterey Bay	Santa Cruz	Disinvested Communities	September 2023 CBO Grant Applicant	1
BioScience Alliance	Ventura	Employers, Businesses, and Business Associations	Completed interview with Brookings	2
Black Leaders and Allies Collaborative (BLAAC)	Monterey	Disinvested Communities	Committee Member Representation; Community Engagement Host; September 2023 CBO Grant Applicant; Organization met with Uplift	11
Blue Sky Center	Santa Barbara	Grassroots and Community-Based Organizations	Community Engagement Host	4
Boys & Girls Clubs of Mid Central Coast	San Luis Obispo, Santa Barbara	Philanthropic Organizations	July 2022 Letter of Support; Committee Member Representation	5
Bright Beginnings Early Childhood Development Initiative	Monterey	Grassroots and Community-Based Organizations	Uplift gave presentation to organization	2
Broadband Consortium of the Pacific Coast (BCPC)	All	Other	July 2022 Letter of Support	1
Building Healthy Communities (BHC)	Monterey	Disinvested Communities	Committee Member Representation; Community Engagement Host	8
Cabrillo College	Santa Cruz, San Benito, Monterey	Education and Training Providers	July 2022 Letter of Support	1

<sup>187</sup> Please reference section “Stakeholder Mapping” for more information on actively engaged stakeholders

<sup>188</sup> Uplift defines actively engaged stakeholders as entities that have been engaged with Uplift in one or more of the following ways as of November 29, 2023: signed a letter of support in July 2022, signed a letter of support in May 2023, applied to Uplift’s September 2023 Community Based Engagement Services Contract, received Uplift’s September 2023 Community Based Engagement Services Contract, met with Uplift, completed an interview with the Brookings Research Team, representation on the Vision and/or Steering Committees, and/or hosted a Community Engagement Session, such as a Listening Session or a Community Convening.

Stakeholder Name	County	Organization Type	Engagement Type	Awareness
Cal Coastal Small Business Development Center	Monterey, San Benito	Employers, Businesses, and Business Associations	July 2022 Letter of Support	1
California Black Power	Monterey	Disinvested Communities	Community Engagement Host; Organization met with Uplift	6
California Community Economic Development Association (CCEDA)	San Luis Obispo	Other	September 2023 CBO Grant Applicant	1
California Forward (CA FWD)	All	Other	July 2022 Letter of Support; September 2023 CBO Grant Applicant	2
California Lutheran University	Ventura	Education and Training Providers	September 2023 CBO Grant Applicant	1
California Manufacturing Technology Consulting (CMTC)	All	Economic Development Agencies	July 2022 Letter of Support; Committee Member Representation; Completed interview with Brookings	7
California Polytechnic State University, San Luis Obispo	San Luis Obispo	Education and Training Providers	July 2022 Letter of Support; Completed interview with Brookings	3
California State University, Channel Islands	Ventura	Education and Training Providers	July 2022 Letter of Support; Completed interview with Brookings	3
California State University, Monterey Bay	Monterey	Education and Training Providers	July 2022 Letter of Support	1
California Workforce Association (CWA)	Statewide	Workforce Entities; Worker Centers	Committee Member Representation	4
Camino Viejo Farms	Ventura	Employers, Businesses, and Business Associations	Uplift gave presentation to organization	2
Center for Community Advocacy (CCA)	Monterey	Grassroots and Community-Based Organizations	July 2022 Letter of Support	1
Center for Farmworker Families	Santa Cruz	Disinvested Communities	Committee Member Representation	4
Center for Information Technology Research in the Interest of Society (CITRIS)	Santa Cruz	Education and Training Providers	July 2022 Letter of Support	1
Central Coast Alliance United a Sustainable Economy (CAUSE)	Ventura County	Economic Development Agencies	Committee Member Representation	4
Central Coast Black Leadership Roundtable (CCBLR)	Santa Barbara	Disinvested Communities	September 2023 CBO Grant Applicant	1
Central Coast Climate Collaborative	Ventura	Environmental Justice Organizations	July 2022 Letter of Support	1
Central Coast Climate Justice Network	San Luis Obispo, Santa Barbara, Ventura	Environmental Justice Organizations	July 2022 Letter of Support; Committee Member Representation; Community Engagement Host	9
Central Coast Community Energy (3CE)	Ventura	Environmental Justice Organizations	Uplift gave presentation to organization	2
Central Coast Creative Corps	All	Philanthropic Organizations	July 2022 Letter of Support	1

Stakeholder Name	County	Organization Type	Engagement Type	Awareness
Central Coast Hispanic Business Association (HBA)	San Luis Obispo	Employers, Businesses, and Business Associations	September 2023 CBO Grant Applicant	1
Central Coast K-16 Education Collaborative	All	Education and Training Providers	July 2022 Letter of Support; Organization met with Uplift	3
Central Coast Labor Council	San Luis Obispo, Santa Barbara, Ventura	Labor Organizations	July 2022 Letter of Support; Committee Member Representation; Completed interview with Brookings	7
Centro Binacional para el Desarrollo Indígena Oaxaqueño (CBDIO)	Monterey	Disinvested Communities	July 2022 Letter of Support, Community Engagement Host; Organization met with Uplift	7
Child Development Resources (CDR)	Ventura	Other	Uplift gave presentation to organization	2
City of Arroyo Grande	San Luis Obispo	Government Agencies	May 2023 Letter of Support	1
City of Capitola	Santa Cruz	Government Agencies	July 2022 Letter of Support	1
City of Fillmore	Ventura	Government Agencies	May 2023 Letter of Support	1
City of Goleta	Santa Barbara	Government Agencies	May 2023 Letter of Support; Uplift gave presentation to organization	3
City of Gonzales	Monterey	Government Agencies	July 2022 Letter of Support	1
City of Greenfield	Monterey	Government Agencies	July 2022 Letter of Support	1
City of Grover Beach	San Luis Obispo	Government Agencies	July 2022 Letter of Support	1
City of Guadalupe	Santa Barbara	Government Agencies	May 2023 Letter of Support	1
City of Hollister	San Benito	Government Agencies	May 2023 Letter of Support	1
City of King	Monterey	Government Agencies	July 2022 Letter of Support	1
City of Lompoc	Santa Barbara	Government Agencies	July 2022 Letter of Support; Committee Member Representation	5
City of Marina	Monterey	Government Agencies	May 2023 Letter of Support	1
City of Moorpark	Ventura	Government Agencies	July 2022 Letter of Support	1
City of Morro Bay	San Luis Obispo	Government Agencies	July 2022 Letter of Support	1
City of Paso Robles	San Luis Obispo	Government Agencies	July 2022 Letter of Support; Completed interview with Brookings	3
City of Pismo Beach	San Luis Obispo	Government Agencies	May 2023 Letter of Support	1
City of San Juan Bautista	San Benito	Government Agencies	July 2022 Letter of Support	1
City of San Luis Obispo	San Luis Obispo	Government Agencies	July 2022 Letter of Support; Completed interview with Brookings	3
City of San Luis Obispo Economic Development	San Luis Obispo	Economic Development Agencies	May 2023 Letter of Support; Uplift gave presentation to organization	3
City of Santa Barbara	Santa Barbara	Government Agencies	July 2022 Letter of Support	1
City of Santa Cruz	Santa Cruz	Government Agencies	July 2022 Letter of Support	1
City of Santa Maria	Santa Barbara	Government Agencies	July 2022 Letter of Support	1

Stakeholder Name	County	Organization Type	Engagement Type	Awareness
City of Santa Paula	Ventura	Government Agencies	July 2022 Letter of Support	1
City of Seaside	Monterey	Government Agencies	July 2022 Letter of Support	1
City of Solvang	Santa Barbara	Government Agencies	May 2023 Letter of Support	1
City of Thousand Oaks	Ventura	Government Agencies	July 2022 Letter of Support	1
City of Ventura	Ventura	Government Agencies	July 2022 Letter of Support	1
City of Watsonville	Santa Cruz	Government Agencies	July 2022 Letter of Support	1
Commercial Fishermen of Santa Barbara / The Maritime Collective Project	Santa Barbara	Grassroots and Community-Based Organizations	Community Engagement Host; Uplift gave presentation to organization	6
Communities Organized for Relational Power in Action (COPA)	Santa Cruz, Monterey, San Benito	Grassroots and Community-Based Organizations	July 2022 Letter of Support	1
Community Action Board of Santa Cruz County (CAB)	Santa Cruz, Monterey	Grassroots and Community-Based Organizations	July 2022 Letter of Support; September 2023 CBO Grant Applicant; Organization met with Uplift	4
Community Action Partnership of Ventura County	Ventura	Grassroots and Community-Based Organizations	Community Engagement Host	4
Community Bridges	Santa Cruz	Disinvested Communities	Community Engagement Host; Organization met with Uplift	6
Community Environmental Council (CEC)	Santa Barbara	Environmental Justice Organizations	July 2022 Letter of Support; Committee Member Representation; Completed interview with Brookings	7
Community Foundation for Monterey County	Monterey	Philanthropic Organizations	July 2022 Letter of Support; Committee Member Representation; Community Engagement Host	9
Community Foundation for San Benito County	San Benito	Philanthropic Organizations	July 2022 Letter of Support	1
Community Foundation San Luis Obispo County	San Luis Obispo	Philanthropic Organizations	July 2022 Letter of Support; September 2023 CBO Grant Recipient	4
Community Foundation Santa Cruz	Santa Cruz	Philanthropic Organizations	July 2022 Letter of Support	1
Consulado de México en Oxnard	Ventura	Disinvested Communities	Uplift gave presentation to organization	2
Corazon Latino	Santa Barbara	Disinvested Communities	September 2023 CBO Grant Recipient	3
County of Monterey	Monterey	Government Agencies	July 2022 Letter of Support; Committee Member Representation	5
County of Monterey Economic Development	Monterey	Economic Development Agencies	May 2023 Letter of Support	1
County of Monterey Health Department	Monterey	Government Agencies	July 2022 Letter of Support	1
County of San Benito	San Benito	Government Agencies	May 2023 Letter of Support	1
County of San Luis Obispo	San Luis Obispo	Government Agencies	July 2022 Letter of Support	1



Stakeholder Name	County	Organization Type	Engagement Type	Awareness
County of San Luis Obispo Workforce Development Board	San Luis Obispo	Workforce Entities; Worker Centers	July 2022 Letter of Support	1
County of Santa Barbara	Santa Barbara	Government Agencies	July 2022 Letter of Support; Committee Member Representation; Completed interview with Brookings; Uplift gave presentation to organization	9
County of Santa Cruz	Santa Cruz	Government Agencies	July 2022 Letter of Support	1
County of Ventura	Ventura	Government Agencies	July 2022 Letter of Support; Completed interview with Brookings; Uplift gave presentation to organization	5
Court Appointed Special Advocates (CASA) of Santa Cruz County	Santa Cruz	Disinvested Communities	September 2023 CBO Grant Applicant	1
Cuesta College	San Luis Obispo	Education and Training Providers	July 2022 Letter of Support	1
Digital NEST	Santa Cruz, Monterey	Worker Centers; Disinvested Communities	July 2022 Letter of Support	1
Diversity Coalition San Luis Obispo County	San Luis Obispo	Disinvested Communities	July 2022 Letter of Support; Committee Member Representation; September 2023 CBO Grant Applicant	6
Ecology Action	Santa Cruz	Environmental Justice Organizations	July 2022 Letter of Support	1
Economic Development Corporation (EDC) of San Benito County	San Benito	Economic Development Agencies	July 2022 Letter of Support; Completed interview with Brookings	3
El Pajaro Community Development Corporation	Santa Cruz, Monterey, San Benito	Economic Development Agencies	July 2022 Letter of Support	1
Esperanza Community Farms	Santa Cruz, Monterey	Other	September 2023 CBO Grant Applicant	1
Everyone's Harvest	Monterey	Environmental Justice Organizations	July 2022 Letter of Support	1
Farmhouse Communications	San Benito	Grassroots and Community-Based Organizations	Committee Member Representation	4
Fillmore Rotary	Ventura	Other	Uplift gave presentation to organization	2
First 5 Monterey County	Monterey	Philanthropic Organizations	July 2022 Letter of Support; September 2023 CBO Grant Recipient; Organization met with Uplift	6
First 5 San Luis Obispo County	San Luis Obispo	Philanthropic Organizations	July 2022 Letter of Support	1
First 5 Santa Barbara	Santa Barbara	Philanthropic Organizations	Committee Member Representation	4
First 5 Ventura County	Ventura	Philanthropic Organizations	July 2022 Letter of Support; Uplift gave presentation to organization	3
Food Bank for Monterey County	Monterey	Philanthropic Organizations	September 2023 CBO Grant Applicant	1



Stakeholder Name	County	Organization Type	Engagement Type	Awareness
Gala Pride and Diversity Center	San Luis Obispo	Disinvested Communities	September 2023 CBO Grant Recipient	3
Gateway Educational Services	Santa Barbara	Education and Training Providers	Committee Member Representation	4
Global Empathy Training Academy (GETA)	Ventura	Grassroots and Community-Based Organizations	September 2023 CBO Grant Applicant	1
Goodwill Central Coast	All	Workforce Entities; Worker Centers	July 2022 Letter of Support	1
Graniterock*	Monterey	Employers, Businesses, and Business Associations	July 2022 Letter of Support	1
Guadalupe Business Association	Santa Barbara	Employers, Businesses, and Business Associations	July 2022 Letter of Support	1
Healing and Reconciliation Institute	Monterey	Disinvested Communities	September 2023 CBO Grant Recipient; Organization met with Uplift	5
Healing Justice Santa Barbara	Santa Barbara	Disinvested Communities	Organization met with Uplift	2
Housing Matters	Santa Cruz	Disinvested Communities	September 2023 CBO Grant Recipient	3
Institute for Innovation and Economic Development at California State University Monterey Bay	Monterey	Education and Training Providers	July 2022 Letter of Support	1
Joby Aviation	Santa Cruz	Employers, Businesses, and Business Associations	July 2022 Letter of Support; Completed interview with Brookings	3
Jolly Knowledge Learning Center (JKLC) Concierge Academic Tutoring*	Santa Barbara	Other	September 2023 CBO Grant Applicant	1
Laborers International Union (LiUNA Local 585)	Ventura	Labor Organizations	July 2022 Letter of Support	1
League of California Community Foundations	Statewide	Philanthropic Organizations	July 2022 Letter of Support	1
Livingston Memorial Visiting Nurse Association & Hospice	Ventura	Other	September 2023 CBO Grant Applicant	1
Loaves, Fishes & Computers, Inc. (LFC)	Monterey	Education and Training Providers	Committee Member Representation	4
Lompoc Valley Chamber of Commerce	Santa Barbara	Employers, Businesses, and Business Associations	July 2022 Letter of Support; Organization met with Uplift	3
Los Amigos de Guadalupe	Santa Barbara	Grassroots and Community-Based Organizations	Organization met with Uplift	2
Manos Unidas	Ventura County	Grassroots and Community-Based Organizations	Community Engagement Host; Organization Met with Uplift	6
Matter Laboratories	Ventura, Santa Barbara	Employers, Businesses, and Business Associations	July 2022 Letter of Support; Uplift gave presentation to organization	3
Mavericks Civilian Space Foundation	All	Education and Training Providers	July 2022 Letter of Support	1
Meals on Wheels of the Monterey Peninsula	Monterey	Disinvested Communities	September 2023 CBO Grant Applicant	1

Stakeholder Name	County	Organization Type	Engagement Type	Awareness
Mixteco/Indigena Community Organizing Project (MICOP)	Ventura	Disinvested Communities	July 2022 Letter of Support	1
Momentum WORK, Inc.	Santa Barbara	Disinvested Communities	Uplift gave presentation to organization	2
Monterey Bay Central Labor Council	Santa Cruz, Monterey	Labor Organizations	July 2022 Letter of Support; Committee Member Representation; September 2023 CBO Grant Recipient	8
Monterey Bay Drone, Automation and Robotics Technology (DART)	Monterey	Economic Development Agencies	July 2022 Letter of Support; Completed interview with Brookings	3
Monterey County Black Caucus	Monterey	Disinvested Communities	Community Engagement Host; Organization met with Uplift	6
Monterey County Business Council	Monterey	Economic Development Agencies	September 2023 CBO Grant Applicant; Completed interview with Brookings	3
Monterey County Hospitality Association	Monterey	Employers, Businesses, and Business Associations	Completed interview with Brookings	2
Monterey County Office of Education	Monterey	Education and Training Providers	July 2022 Letter of Support	1
Monterey County Vintners Association	Monterey	Employers, Businesses, and Business Associations	Completed interview with Brookings	2
Monterey County Workforce Development Board (WDB)	Monterey	Workforce Entities; Worker Centers	July 2022 Letter of Support; Completed interview with Brookings	3
Mujeres en Acción	Santa Cruz, Monterey	Grassroots and Community-Based Organizations	July 2022 Letter of Support; Committee Member Representation; Community Engagement Host; September 2023 CBO Grant Recipient; Organization met with Uplift	14
National Association for the Advancement of Colored People (NAACP) - Santa Maria-Lompoc Branch	Santa Barbara	Disinvested Communities	Committee Member Representation; Community Engagement Host; September 2023 CBO Grant Recipient	11
National Association for the Advancement of Colored People (NAACP)-Ventura County Branch	Ventura	Disinvested Communities	September 2023 CBO Grant Recipient	3
National Development Council	All	Economic Development Agencies	July 2022 Letter of Support	1
Naval Facilities Engineering and Expeditionary Warfare Center (NAVFAC EXWC)	Ventura	Government Agencies	July 2022 Letter of Support	1
New West Symphony	Ventura	Philanthropic Organizations	July 2022 Letter of Support	1
NewGrit	Santa Barbara	Grassroots and Community-Based Organizations	July 2022 Letter of Support	1

Stakeholder Name	County	Organization Type	Engagement Type	Awareness
Northern Santa Barbara County United Way	Santa Barbara	Grassroots and Community-Based Organizations	September 2023 CBO Grant Applicant	1
Organización Mariposas	Monterey	Disinvested Communities	Community Engagement Host; Organization met with Uplift	6
Oxnard Performing Arts Center Corporation (OPAC)	Ventura	Philanthropic Organizations	July 2022 Letter of Support	1
Pajaro Disaster Long Term Recovery Alliance serving Monterey County (PDLTRA)	Santa Cruz	Grassroots and Community-Based Organizations	September 2023 CBO Grant Applicant	1
Pajaro Valley Unified School District	Santa Cruz	Education and Training Providers	July 2022 Letter of Support; Committee Member Representation	5
Port of Hueneme	Ventura	Other	July 2022 Letter of Support; Completed interview with Brookings	3
Promotores Collaborative of San Luis Obispo	San Luis Obispo	Grassroots and Community-Based Organizations	Uplift gave presentation to organization	2
RACE Matters SLO	San Luis Obispo	Disinvested Communities	Uplift gave presentation to organization	2
Rancho Cielo	Monterey	Grassroots and Community-Based Organizations; Worker Centers	July 2022 Letter of Support	1
Rancho Sespe, Farm Worker Housing	Ventura	Disinvested Communities	Community Engagement Host	4
Regeneración - Pajaro Valley Climate Action	Monterey	Environmental Justice Organizations	July 2022 Letter of Support; Committee Member Representation	5
Rise Together Coalition	Santa Cruz	Disinvested Communities	July 2022 Letter of Support	1
Rising Worldwide	Santa Cruz	Disinvested Communities	September 2023 CBO Grant Applicant	1
Romero Institute (Let's Green CA!)	Santa Cruz	Environmental Justice Organizations	July 2022 Letter of Support	1
Rural County Representatives of California (RCRC)	Monterey, San Benito, San Luis Obispo, Santa Barbara	Economic Development Agencies	July 2022 Letter of Support	1
Salinan Tribe of Monterey and San Luis Obispo Counties	Monterey, San Luis Obispo	California Native American Tribes	Organization met with Uplift	2
Salinas Inclusive Economic Development Initiative (SIEDI)	Monterey	Economic Development Agencies	July 2022 Letter of Support; Committee Member Representation; Community Engagement Host; Organization met with Uplift	11
Salinas Regional Sports Authority	San Luis Obispo	Other	Uplift gave presentation to organization; Community Engagement Host	6
San Benito County Business Council	San Benito	Employers, Businesses, and Business Associations	July 2022 Letter of Support; Committee Member Representation; Completed interview with Brookings	7

Stakeholder Name	County	Organization Type	Engagement Type	Awareness
San Benito County Workforce Development Board	San Benito	Workforce Entities; Worker Centers	Completed interview with Brookings	2
San Benito Health Foundation	San Benito	Disinvested Communities	July 2022 Letter of Support; Committee Member Representation;	5
San Luis Coastal Education Foundation	San Luis Obispo	Education and Training Providers	July 2022 Letter of Support; Committee Member Representation; September 2023 CBO Grant Applicant	6
San Luis Obispo Chamber of Commerce	San Luis Obispo	Economic Development Agencies	Committee Member Representation	4
San Luis Obispo Council of Governments (SLOCOG)	San Luis Obispo	Government Agencies	July 2022 Letter of Support; Completed interview with Brookings	3
San Luis Obispo County Child Abuse Prevention Council DBA: Center for Family Strengthening	San Luis Obispo	Grassroots and Community-Based Organizations	September 2023 CBO Grant Recipient	3
Santa Barbara City College	Santa Barbara	Education and Training Providers	July 2022 Letter of Support; Committee Member Representation; Organization met with Uplift	7
Santa Barbara County Action Network (SBCAN)	Santa Barbara	Grassroots and Community-Based Organizations	Committee Member Representation	4
Santa Barbara County Association of Governments (SBCAG)	Santa Barbara	Government Agencies	July 2022 Letter of Support; Completed interview with Brookings	3
Santa Barbara County Food Action Network (SBCFAN)	Santa Barbara	Grassroots and Community-Based Organizations	July 2022 Letter of Support; September 2023 CBO Grant Applicant; Organization met with Uplift	4
Santa Barbara County Workforce Development Board (SBCWDB)	Santa Barbara	Workforce Entities; Worker Centers	July 2022 Letter of Support; Uplift gave presentation to organization	3
Santa Barbara Foundation	Santa Barbara	Philanthropic Organizations	July 2022 Letter of Support	1
Santa Barbara Public Library	Santa Barbara	Other	Uplift gave presentation to organization	2
Santa Barbara South Coast Chamber of Commerce	Santa Barbara	Employers, Businesses, and Business Associations	July 2022 Letter of Support; Completed interview with Brookings; Uplift gave presentation to organization	5
Santa Cruz Black	Santa Cruz	Disinvested Communities	Community Engagement Host; Organization met with Uplift	6
Santa Cruz Community Health Centers (SCCHC)	Santa Cruz	Other	September 2023 CBO Grant Applicant	1
Santa Cruz County Business Council	Santa Cruz	Employers, Businesses, and Business Associations	July 2022 Letter of Support	1
Santa Cruz County Office of Education	Santa Cruz	Education and Training Providers	July 2022 Letter of Support	1

Stakeholder Name	County	Organization Type	Engagement Type	Awareness
Santa Cruz Works	Santa Cruz, Monterey	Employers, Businesses, and Business Associations; Worker Centers	July 2022 Letter of Support; September 2023 CBO Grant Applicant; Completed interview with Brookings	4
Santa Maria Airport	Santa Barbara	Other	Uplift gave presentation to organization	2
Santa Maria Valley Chamber	Santa Barbara	Employers, Businesses, and Business Associations	July 2022 Letter of Support; Completed interview with Brookings; Uplift gave presentation to organization	5
Santa Maria Valley Community Foundation	Santa Barbara	Employers, Businesses, and Business Associations	September 2023 CBO Grant Applicant	1
Santa Paula Latino Town Hall	Ventura	Disinvested Communities	Uplift gave presentation to organization	2
Santa Ynez Band of Chumash Indians	NA (Federally recognized tribe)	California Native American Tribes	July 2022 Letter of Support; Committee Member Representation	5
Saticoy Food Hub	Ventura	Disinvested Communities	September 2023 CBO Grant Applicant	1
SCORE Santa Barbara	Santa Barbara	Economic Development Agencies	Uplift gave presentation to organization	2
SCORE Ventura County	Ventura	Economic Development Agencies	July 2022 Letter of Support	1
Shelter Care Resources	Ventura	Disinvested Communities	September 2023 CBO Grant Recipient	3
SLO County UndocuSupport	San Luis Obispo	Disinvested Communities	Committee Member Representation	4
SLO Healthcare Workforce Partnership	San Luis Obispo	Workforce Entities; Worker Centers	Uplift gave presentation to organization	2
SLO Partners	San Luis Obispo, Santa Barbara	Education and Training Providers	July 2022 Letter of Support	1
Solvang Chamber of Commerce	Santa Barbara	Employers, Businesses, and Business Associations	July 2022 Letter of Support; Uplift gave presentation to organization	3
Solvang Community Development Alliance	Santa Barbara	Employers, Businesses, and Business Associations	September 2023 CBO Grant Applicant	1
South Central Coast Regional Consortium (SCCRC)	San Luis Obispo, Santa Barbara, Ventura	Education and Training Providers	July 2022 Letter of Support	1
Southern California Association of Governments (SCAG)	Ventura	Government Agencies	July 2022 Letter of Support	1
Taylor Farms Center for Learning	Monterey	Education and Training Providers	Committee Member Representation	4
The Bell Arts Factory	Ventura	Grassroots and Community-Based Organizations	July 2022 Letter of Support; Uplift gave presentation to organization	3
The Diversity Center Santa Cruz	Santa Cruz	Disinvested Communities	Organization met with Uplift	2

Stakeholder Name	County	Organization Type	Engagement Type	Awareness
The Economic Alliance Foundation (EconAlliance)	Santa Barbara	Economic Development Agencies	May 2023 Letter of Support; September 2023 CBO Grant Applicant; Organization met with Uplift	4
The Fund for Santa Barbara	Santa Barbara	Disinvested Communities	Organization met with Uplift	2
The Hartnell College and Hartnell College Foundation	Monterey	Education and Training Providers	July 2022 Letter of Support; Committee Member Representation; Completed interview with Brookings	7
The Tri-County Regional Energy Network (3C-REN)	All	Government Agencies	July 2022 Letter of Support	1
The Ventura County Transportation Commission (VCTC)	Ventura	Other	Completed interview with Brookings	2
The Village Project, Inc	Monterey	Environmental Justice Organizations	Community Engagement Host; September 2023 CBO Grant Applicant; Organization met with Uplift	7
Tri-Counties Building and Construction Trades Council	San Luis Obispo, Santa Barbara, Ventura	Labor Organizations	July 2022 Letter of Support	1
True Nature Society dba Quail Springs (QS)	Santa Barbara	Environmental Justice Organizations	September 2023 CBO Grant Recipient ; Uplift gave presentation to organization	5
United Way Monterey County	Monterey	Philanthropic Organizations	July 2022 Letter of Support; Committee Member Representation	5
University of California, Santa Barbara	Santa Barbara	Education and Training Providers	July 2022 Letter of Support; Uplift gave presentation to organization	3
University of California, Santa Cruz	Santa Cruz	Education and Training Providers	July 2022 Letter of Support; Committee Member Representation; Completed interview with Brookings; Community Engagement Host	11
Ventura County Community College District	Ventura	Education and Training Providers	July 2022 Letter of Support; Completed interview with Brookings; Uplift gave presentation to organization	5
Ventura County Community Development Corporation	Ventura	Other	September 2023 CBO Grant Applicant	1
Ventura County Community Foundation	Ventura	Philanthropic Organizations	July 2022 Letter of Support; Committee Member Representation; Uplift gave presentation to organization	7
Ventura County Industry Council (VCIC)	Ventura	Employers, Businesses, and Business Associations	July 2022 Letter of Support; Completed interview with Brookings; Uplift gave presentation to organization	5
Ventura County Office of Education (VCOE)	Ventura	Education and Training Providers	Uplift gave presentation to organization	2
Ventura County STEM	Ventura	Education and Training Providers	July 2022 Letter of Support	1

Stakeholder Name	County	Organization Type	Engagement Type	Awareness
Ventura Tech Bridge	Ventura	Other	Completed interview with Brookings	2
Ventures	Santa Cruz, San Benito, Monterey	Disinvested Communities	September 2023 CBO Grant Recipient	3
Visión y Compromiso	Statewide, San Luis Obispo, Santa Barbara, Ventura	Disinvested Communities	July 2022 Letter of Support; Community Engagement Host	5
Visit California Initiative	ALL	Other	Organization met with Uplift	2
Visit SLO CAL	San Luis Obispo	Other	July 2022 Letter of Support	1
Westmont College	Santa Barbara	Education and Training Providers	July 2022 Letter of Support	1
Westside Community Development Corporation (WCDC)	Ventura	Grassroots and Community-Based Organizations	Uplift gave presentation to organization	2
Women's Economic Ventures (WEV)	Santa Barbara, Ventura	Economic Development Agencies	July 2022 Letter of Support; Committee Member Representation; September 2023 CBO Grant Recipient; Uplift gave presentation to organization	10
Women's March Santa Maria Valley	Santa Barbara	Grassroots and Community-Based Organizations	September 2023 CBO Grant Applicant	1
Workforce Development Board of Ventura County (WDBVC)	Ventura	Workforce Entities; Worker Centers	July 2022 Letter of Support; Committee Member Representation	5
Youth Alliance (YA) San Benito County	San Benito	Grassroots and Community-Based Organizations	Committee Member Representation; September 2023 CBO Grant Recipient; Organization met with Uplift	9
ytt Northern Chumash Nonprofit	San Luis Obispo	California Native American Tribes	July 2022 Letter of Support; Committee Member Representation; Organization met with Uplift	7



**Table 4B: Stakeholder Benefit Matrix: Benefits<sup>189</sup>**

The below table indicates the list of potential benefits that stakeholders may receive from Uplift and California Jobs First.

Category	California Jobs First Priority	Explanation of Benefit	Benefit Metric/Source
Economic Opportunity	Sustainable Industries	Increase in quality jobs with living wages	Number of jobs created, use EDD and MIT Living Wage Calculator and U.S. Census Bureau 5-year American Community Survey
Economic Opportunity	Sustainable Industries	Employment growth in target industry clusters	U.S. Cluster Mapping Project
Economic Opportunity	Good Jobs & Economic Security for All	Earnings growth by wage level	National Equity Atlas / IPUMS 2019
Economic Opportunity	Good Jobs & Economic Security for All	Workers earning family-supporting wages	U.S. Census Bureau 5-year American Community Survey
Economic Opportunity	Good Jobs & Economic Security for All	Employment rate (employment-to-population ratio)	IPUMS
Economic Opportunity	Good Jobs & Economic Security for All	Increase in job training, apprenticeship opportunities, union development, skill development	Number of new training centers and apprenticeships openings
Economic Opportunity	Sustainable Industries	Gross metropolitan product growth in target industry clusters	U.S. Cluster Mapping Project
Equity	Thriving Businesses	Increase in number of firms by owner race/ethnicity	National Equity Atlas / U.S. Census Bureau Annual Business Survey and NES-D series; Survey of Business Owners
Equity	Thriving Businesses	Revenue growth of firms by owner race/ethnicity	National Equity Atlas / U.S. Census Bureau Annual Business Survey and NES-D series; Survey of Business Owners
Equity	Thriving Businesses	Loans to small businesses in priority census tracts	Federal Financial Institutions Examination Council / Community Reinvestment Act (CRA) data
Equity	Inclusive Governance	Participation of underrepresented residents in decision-making processes	From attendance lists of Community Engagement sessions
Equity	Inclusive Governance	Participation of CBOs working in priority census tracts/zip codes in decision-making processes	From attendance lists of Community Engagement sessions
Equity	Healthy Communities of Opportunity	College attainment (2-year degree or above)	CA Dream Index from Census ACS, "Student Success Metrics"
Equity	Healthy Communities of Opportunity	Percent living in high-poverty neighborhoods	U.S. Census Bureau 5-year American Community Survey / CDI
Sustainability	Sustainable Industries	Increase in jobs in sustainable fields (i.e., offshore wind)	Number of quality green jobs created, use MIT Living Wage Calculator and US Bureau of Labor Statistics

<sup>189</sup> Please see section "Stakeholder Mapping" for more information on the Stakeholder Benefit Matrix.



Category	California Jobs First Priority	Explanation of Benefit	Benefit Metric/Source
Sustainability	Healthy Communities of Opportunity	Pollution burden in priority census tracts/zip co	Region specific
Sustainability	Green Infrastructure	Public transit expansion and creation, specifically within disadvantaged areas	Percentage of new and expanding area covered by public transit

**Table 4C: Stakeholder Benefit Matrix: Benefit per Stakeholder Group<sup>190</sup>**

The below table indicates the potential benefits that each stakeholder group may receive from Uplift and California Jobs First.

Stakeholder Group	Category	California Jobs First Priority	Explanation of Benefit
Black, Indigenous, Latinx, and People of Color	Equity	Thriving Businesses	Increase in number of firms by owner race/ethnicity
Black, Indigenous, Latinx, and People of Color	Equity	Thriving Businesses	Revenue growth of firms by owner race/ethnicity
Black, Indigenous, Latinx, and People of Color	Equity	Inclusive Governance	Participation of underrepresented residents in decision-making processes
Black, Indigenous, Latinx, and People of Color	Equity	Inclusive Governance	Participation of CBOs working in priority census tracts/zip codes in decision-making processes
Black, Indigenous, Latinx, and People of Color	Sustainability	Healthy Communities of Opportunity	Pollution burden in priority census tracts/zip co
Black, Indigenous, Latinx, and People of Color	Economic Opportunity	Sustainable Industries	Increase in quality jobs with living wages
Black, Indigenous, Latinx, and People of Color	Sustainability	Sustainable Industries	Increase in jobs in sustainable fields (i.e., offshore wind)
Black, Indigenous, Latinx, and People of Color	Economic Opportunity	Good Jobs & Economic Security for All	Earnings growth by wage level
Black, Indigenous, Latinx, and People of Color	Economic Opportunity	Good Jobs & Economic Security for All	Workers earning family-supporting wages
Black, Indigenous, Latinx, and People of Color	Economic Opportunity	Good Jobs & Economic Security for All	Employment rate (employment-to-population ratio)
Black, Indigenous, Latinx, and People of Color	Economic Opportunity	Good Jobs & Economic Security for All	Increase in job training, apprenticeship opportunities, union development, skill development
Black, Indigenous, Latinx, and People of Color	Equity	Healthy Communities of Opportunity	College attainment (2-year degree or above)
Black, Indigenous, Latinx, and People of Color	Equity	Healthy Communities of Opportunity	Percent living in high-poverty neighborhoods
Economically Disenfranchised	Economic Opportunity	Sustainable Industries	Increase in quality jobs with living wages
Economically Disenfranchised	Sustainability	Sustainable Industries	Increase in jobs in sustainable fields (i.e., offshore wind)
Economically Disenfranchised	Economic Opportunity	Good Jobs & Economic Security for All	Earnings growth by wage level
Economically Disenfranchised	Economic Opportunity	Good Jobs & Economic Security for All	Employment rate (employment-to-population ratio)

<sup>190</sup> Please reference section “Stakeholder Mapping” for more information on the Stakeholder Benefit Matrix.

Stakeholder Group	Category	California Jobs First Priority	Explanation of Benefit
Economically Disenfranchised	Economic Opportunity	Good Jobs & Economic Security for All	Increase in job training, apprenticeship opportunities, union development, skill development
Economically Disenfranchised	Equity	Inclusive Governance	Participation of underrepresented residents in decision-making processes
Economically Disenfranchised	Equity	Inclusive Governance	Participation of CBOs working in priority census tracts/zip codes in decision-making processes
Economically Disenfranchised	Equity	Healthy Communities of Opportunity	Percent living in high-poverty neighborhoods
Small Business Owners	Equity	Thriving Businesses	Loans to small businesses in priority census tracts
Small Business Owners	Equity	Thriving Businesses	Revenue growth of firms by owner race/ethnicity
Small Business Owners	Economic Opportunity	Sustainable Industries	Employment growth in target industry clusters
Small Business Owners	Equity	Thriving Businesses	Increase in number of firms by owner race/ethnicity
Small Business Owners	Economic Opportunity	Sustainable Industries	Gross metropolitan product growth in target industry clusters
Youth, Young Adults, Students, and Parents	Economic Opportunity	Good Jobs & Economic Security for All	Workers earning family-supporting wages
Youth, Young Adults, Students, and Parents	Economic Opportunity	Good Jobs & Economic Security for All	Increase in job training, apprenticeship opportunities, union development, skill development
Youth, Young Adults, Students, and Parents	Sustainability	Green Infrastructure	Public transit expansion and creation, specifically within disadvantaged areas
Youth, Young Adults, Students, and Parents	Equity	Healthy Communities of Opportunity	College attainment (2-year degree or above)
Farmworkers and Agricultural Communities	Economic Opportunity	Good Jobs & Economic Security for All	Earnings growth by wage level
Farmworkers and Agricultural Communities	Economic Opportunity	Good Jobs & Economic Security for All	Workers earning family-supporting wages
Farmworkers and Agricultural Communities	Economic Opportunity	Good Jobs & Economic Security for All	Increase in job training, apprenticeship opportunities, union development, skill development
Farmworkers and Agricultural Communities	Sustainability	Healthy Communities of Opportunity	Pollution burden in priority census tracts/zip co
Farmworkers and Agricultural Communities	Equity	Healthy Communities of Opportunity	Percent living in high-poverty neighborhoods
Employees	Economic Opportunity	Sustainable Industries	Increase in quality jobs with living wages
Employees	Economic Opportunity	Sustainable Industries	Increase in jobs in sustainable fields (i.e., offshore wind)
Employees	Economic Opportunity	Sustainable Industries	Employment growth in target industry clusters
Employees	Economic Opportunity	Good Jobs & Economic Security for All	Earnings growth by wage level
Employees	Economic Opportunity	Good Jobs & Economic Security for All	Workers earning family-supporting wages
Employees	Economic Opportunity	Good Jobs & Economic Security for All	Employment rate (employment-to-population ratio)

Stakeholder Group	Category	California Jobs First Priority	Explanation of Benefit
Employees	Economic Opportunity	Good Jobs & Economic Security for All	Increase in job training, apprenticeship opportunities, union development, skill development
Women and LGBTQ+ Individuals	Equity	Thriving Businesses	Increase in number of firms by owner race/ethnicity
Women and LGBTQ+ Individuals	Equity	Thriving Businesses	Revenue growth of firms by owner race/ethnicity
Women and LGBTQ+ Individuals	Equity	Inclusive Governance	Participation of underrepresented residents in decision-making processes
Women and LGBTQ+ Individuals	Equity	Inclusive Governance	Participation of CBOs working in priority census tracts/zip codes in decision-making processes
Women and LGBTQ+ Individuals	Economic Opportunity	Sustainable Industries	Increase in quality jobs with living wages
Women and LGBTQ+ Individuals	Sustainability	Sustainable Industries	Increase in jobs in sustainable fields (i.e., offshore wind)
Older Adults	Sustainability	Healthy Communities of Opportunity	Pollution burden in priority census tracts/zip co
Older Adults	Sustainability	Green Infrastructure	Public transit expansion and creation, specifically within disadvantaged areas
Large Employers	Economic Opportunity	Sustainable Industries	Employment growth in target industry clusters
Large Employers	Equity	Thriving Businesses	Increase in number of firms by owner race/ethnicity
Large Employers	Equity	Thriving Businesses	Revenue growth of firms by owner race/ethnicity
Large Employers	Economic Opportunity	Sustainable Industries	Gross metropolitan product growth in target industry clusters

#### Table 4D: Committee Member Identified Stakeholders

The below table includes a list of potential stakeholders identified by committee members.

Stakeholder Name
Grower-Shipper Association of Central California
Farm Bureau of San Benito
Farm Bureau of Santa Cruz
Farm Bureau of Monterey
Farm Bureau of San Luis Obispo
Farm Bureau of Santa Barbara
Farm Bureau of Ventura
California Coastal Rural Development Council
Hispanic Chamber of the Central Coast
Gavilan College
Spirit of San Juan Bautista
Agriculture and Land-Based Training Association (ALBA)
Center for Manufacturing Excellence (MANEX)
Rural County Representatives of California (RCRC)
Council of San Benito County Governments (COG)
San Benito County High School District

## Annex 5: Community Engagement Details

The table below includes Listening Sessions and Community Convenings<sup>191</sup> hosted by Uplift from June 17, 2023, through December 2, 2023.

Type	Host	Date	County	Language	Demographic	Participants
Listening Session	Visión y Compromiso	17-Jun	Santa Barbara	Spanish	Women, Hispanic/Latino/x/e Community, Spanish Speakers, Promotoras	22
Listening Session	Visión y Compromiso	17-Jun	Santa Barbara	Spanish	Women, Hispanic/Latino/x/e Community, Spanish Speakers, Promotoras	15
Community Convening	MBEP	22-Jun	Monterey	English	CBOs	28
Community Convening	Uplift	28-Jun	ALL	English with Spanish interpretation	Public	211
Listening Session	Manos Unidas	29-Jun	Ventura	Spanish	Women, Hispanic/Latino/x/e Community, Spanish Speakers	36
Community Convening	Uplift	10-Jul	Monterey	English with Spanish interpretation	Public	32
Community Convening	Uplift	11-Jul	San Benito	English with Spanish interpretation	Public CBOs, Community Members	22
Community Convening	Uplift	12-Jul	San Luis Obispo	English with Spanish interpretation	Public CBOs, Community Members	30
Community Convening	Uplift	12-Jul	Santa Barbara	English with Spanish interpretation	Public CBOs, Community Members	14
Community Convening	Uplift	13-Jul	Ventura	English with Spanish interpretation	Public CBOs, Community Members	37
Listening Session	Commercial Fishermen of Santa Barbara	17-Jul	Santa Barbara	English	Outdoor Workers, Labor Organizations, Small Business Owners	15

<sup>191</sup> See section "Introduction" for more information on Uplift's Community Engagement efforts.

Type	Host	Date	County	Language	Demographic	Participants
Listening Session	Santa Cruz Community Action Board	20-Jul	Santa Cruz	Spanish	Agricultural workers, Immigrant Parents	30
Listening Session	BLAAC	25-Jul	Monterey	English	Black or African American Community, Underserved Communities	21
Listening Session	The Village Project Inc.	26-Jul	Monterey	English	Black or African American Community, Underserved Communities	44
Listening Session	Santa Cruz Community Action Board	27-Jul	Santa Cruz	Spanish	Parent Group, Farmers, Caregivers, Day Laborers	36
Listening Session	Community Action VC	27-Jul	Ventura	Spanish	Childcare Providers, Spanish and Mixtec Speakers	26
Listening Session	SIEDI	2-Aug	Monterey	Spanish	Farmers, Workers, Parents, Women, Caregivers	118
Listening Session	Blue Sky Center	6-Aug	Santa Barbara	Spanish	Outdoor workers, Latino/x/e Community, Spanish and Mixtec Speakers, Environmentally Disadvantaged Communities (CEPA)	24
Listening Session	Blue Sky Center	6-Aug	Santa Barbara	English	Environmentally Disadvantaged Communities (CEPA)	21
Community Convening	Uplift	14-Aug	Santa Cruz	English	Public CBOs, Community Members	10
Listening Session	NAACP	14-Aug	Santa Barbara, San Luis Obispo	English	People of Color	12
Listening Session	Organización Mariposas	16-Aug	Monterey	Spanish	Parents of Children with Disabilities (Spanish Speakers)	30
Listening Session	Centro Binacional Para el Desarrollo Indigena Oaxaqueño (CBDIO)	17-Aug	Monterey	Spanish/Chatino	Indigenous Community in Salinas	65

Type	Host	Date	County	Language	Demographic	Participants
Listening Session	Building Healthy Communities (BHC)	23-Aug	Monterey	Spanish with English interpretation	Black or African American Community, Underserved Communities, Youth	83
Listening Session	Building Healthy Communities (BHC)	28-Aug	Monterey	Spanish with English interpretation	Black or African American Community, Underserved Communities, Youth	60
Listening Session	Mujeres en Acción	29-Aug	Monterey	Spanish with English interpretation	Women Farmworkers, Caregivers, Single Mothers, Day Laborers	167
Listening Session	Centro Binacional (CBDIO)	25-Sep	Monterey	Mixtec/Spanish	Mixtecan Community	71
Listening Session	Black Power	28-Sep	Monterey	English	Black or African American Community	58
Listening Session	Monterey County Black Caucus	2-Oct	Monterey	English	Black or African American Community	115
Listening Session	Rancho Sespe, Farm Worker Housing	20-Oct	Ventura	Spanish	Outdoor Workers, Farmers, Producers, Spanish and Mixtec Speakers	15
Listening Session	Centro Binacional (CBDIO)	9-Nov	Monterey	Mixtec/Spanish	Mixtecan Community	47
Listening Session	Santa Cruz Black	28-Nov	Santa Cruz	English	Black or African American Community	12
Listening Session	Centro Binacional (CBDIO)	30-Nov	Monterey	Mixtec/Spanish	Mixtecan Community	60
Listening Session	Ethnic Resource Center (UCSC)	2-Dec	Santa Cruz	English	UCSC students	5



## Annex 6: Top Employers by Central Coast County

The below tables list the major employers<sup>192</sup> in each county of the Central Coast.

**Table 6A: Top Employers in Ventura County**

Employer Name	Location	Industry
Adventist Health Simi Valley	Simi Valley	Hospitals
Amgen Inc	Thousand Oaks	Biological Specimens-Manufacturing
City of Simi Valley	Simi Valley	City Hall
Community Memorial Health System	Ventura	Health Care Management
County of Ventura	Ventura	Police Departments
Haas Automation Inc	Oxnard	Machinery- Manufacturing
Harbor Freight Tools	Camarillo	Tools-New & Used
J M Smucker Co	Oxnard	Food Products & Manufacturing
Kaiser Permanente Ventura 888	Ventura	Medical Centers
Los Robles Regional Med Center	Thousand Oaks	Hospitals
Moorpark College	Moorpark	Junior-Community College-Tech Institutes
Nancy Reagan Breast Center	Simi Valley	Diagnostic Imaging Centers
National Guard	Port Hueneme	Government Offices-State
Naval Air Warfare Center Weapons	Point Mugu Naval Air Warfare Center (NAWC)	Federal Government-National Security
Ojai Valley Inn	Ojai	Hotels & Motels
Oxnard College	Oxnard	Junior-Community College-Tech Institutes
Pentair Aquatic Systems	Moorpark	Swimming Pool Equipment & Supply-Retail
Port Hueneme Naval Division	Port Hueneme Naval Construction Battalion (CBC)	Military Bases
Procter & Gamble Paper Products	Oxnard	Sanitary Paper Products Manufacturing
Rancho Simi Recreation & Park District	Simi Valley	Swimming Pools-Public
St John's Regional Medical Center	Oxnard	Hospitals
Thousand Oaks Civic Arts Plaza	Thousand Oaks	Theatres-Live
Ventura County Office of Education	Camarillo	Government Education Programs Administration
Ventura County Sherriff's Office	Ventura	County Government-Correctional Institutions

<sup>192</sup> Source: California Employment Development Department, "Major Employers in California," September 2023, <https://labormarketinfo.edd.ca.gov/majorer/MajorER.asp>.

**Table 6B: Top Employers in Santa Barbara County**

<b>Employer Name</b>	<b>Location</b>	<b>Industry</b>
Alisal Ranch	Solvang	Hotels & Motels
Chumash Casino Resort	Santa Ynez	Casinos
Cottage Health	Santa Barbara	Health Care Management
Deckers Outdoor Corp	Goleta	Shoes-Retail
Den Mat Holdings LLC	Lompoc	Dental Equipment & Supplies-Wholesale
Four Seasons Resort	Santa Barbara	Hotels & Motels
Hardy Diagnostics	Santa Maria	Surgical/Med Instruments/Apparatus - Manufacturing
Hilton Santa Barbara	Santa Barbara	Hotels & Motels
J & G Berry Farms LLC	Santa Maria	Berry Farming-Except Strawberry
Jordano's	Santa Barbara	Food Products - Wholesale
Kjee FM	Santa Barbara	Radio Stations & Broadcasting Companies
Marborg Industries	Santa Barbara	Solid Waste Collection
Marian Regional Medical Center	Santa Maria	Hospitals
Mission Linen Supply Inc	Santa Barbara	Linen Supply Service
Montecito Bank & Trust	Goleta	Banks
Nusil Technology Inc	Carpinteria	Silicon - Manufacturing
Ritz-Carlton Bacara Santa Barbara	Goleta	Hotels & Motels
Safran Cabin	Santa Maria	Aircraft Equipment Parts & Supplies- Manufacturing
Santa Barbara City College	Santa Barbara	Junior-Community College-Tech Institutes
Santa Barbara County Probation	Lompoc	Government Offices-County
University of CA Santa Barbara	Santa Barbara	Schools-Universities & Colleges Academic
University of CA Santa Barbara	Santa Barbara	University-College Dept/Facility/Office
US Penitentiary	Lompoc	Federal Govt-Correctional Institutions
Vandenberg Air Force Base-Main	Vandenberg Air Force Base (AFB)	Military Bases
Yardi Systems Inc	Santa Barbara	Software/Application/Platform Publishing

**Table 6C Top Employers in San Luis Obispo**

<b>Employer Name</b>	<b>Location</b>	<b>Industry</b>
Ami Sierra Vista Radiology	San Luis Obispo	Physicians & Surgeons
Apple Farm Inn	San Luis Obispo	Hotels & Motels
Arroyo Grande Community Hospital	Arroyo Grande	Hospitals
Atascadero State Hospital	Atascadero	Hospitals
Broad Street Storage	San Luis Obispo	Storage-Household & Commercial
Cal Poly State University	San Luis Obispo	Schools-Universities & Colleges Academic
California Mid-State Fair	Paso Robles	Concert Venues
California State Parks	San Simeon	State Parks
Cuesta College	Paso Robles	Junior-Community College-Tech Institutes
French Hospital Medical Center	San Luis Obispo	Hospitals
Glenair Inc	Paso Robles	Aerospace Industries - Manufacturing
Madonna Inn Bakery	San Luis Obispo	Resorts
Medi-Cal Eligibility Info	San Luis Obispo	Government Offices-County
Mental Marketing	San Luis Obispo	Advertising-Agencies & Counselors
Morro Bay Art Assn	Morro Bay	Art Galleries & Dealers
Mustang Waterpark	Arroyo Grande	Water Parks
Pacific Gas & Electric Co.	San Luis Obispo	Electric Companies
Pismo State Beach	Oceano	State Parks
Ramirez Farm Labor	Shandon	Labor Contractors
San Luis Obispo County Office of Education	San Luis Obispo	School Districts
San Luis Obispo Sheriff's Dept	San Luis Obispo	Sheriff
Sierra Vista Regional Med Center	San Luis Obispo	Hospitals
Transportation Department	San Luis Obispo	State Government-Regulation & Administration
Trust RCM	San Luis Obispo	Billing Service
Twin Cities Community Hospital	Templeton	Hospitals

**Table 6D Top Employers in San Benito**

<b>Employer Name</b>	<b>Location</b>	<b>Industry</b>
Coke Farm	San Juan Bautista	Farms
Corbin Sparrow	Hollister	Motorcycles-Supplies & Parts-Manufacturers
Denise & Filice Packing Co	Hollister	Fruits & Vegetables-Wholesale
Earthbound Farm	San Juan Bautista	Marketing Programs & Services
Guerra Nut Shelling Co	Hollister	Roasted Nuts & Peanut Butter-Manufacturing
Hollister Dual Language Academy	Hollister	School Districts
Hollister School District	Hollister	School Districts
Lucky Supermarkets	Hollister	Grocers-Retail
Nob Hill Foods	Hollister	Grocers-Retail
Pacific Harvest Seafoods	San Juan Bautista	Frozen Fruit/Fruit Juices/Vegs-Manufacturing
Pacific Scientific Energetic	Hollister	Explosives-Manufacturers
R & R Labor	Hollister	Labor Contractors
R O Hardin Elementary School	Hollister	Schools
Rancho San Justo Middle School	Hollister	Schools
Safeway	Hollister	Grocers-Retail
San Benito Foods	Hollister	Canning - Manufacturing
San Benito Foods	Hollister	Food Products & Manufacturers
San Benito High School	Hollister	Stadiums Arenas & Athletic Fields
San Benito Sheriff	Hollister	Sheriff
Target	Hollister	Department Stores
Trical Inc	Hollister	Farms
True Leaf Farms	San Jn Bautista	Farms
Waste Management	Hollister	Garbage Collection
West Marine Distribution Center	Hollister	Distribution Centers-Wholesale
Willis Construction Co Inc	San Juan Bautista	Concrete Products-Except Block & Brick-Manufacturing

**Table 6E Top Employers in Monterey**

<b>Employer Name</b>	<b>Location</b>	<b>Industry</b>
Al Pak Labor	Soledad	Labor Contractors
Azcona Harvesting	Greenfield	Harvesting-Contract
Bud of California	Soledad	Fruits & Vegetables-Growers & Shippers
County-Monterey Behavioral	King City	Health Services
Filipino American Community Club	Marina	Church Organizations
Fort Hunter Liggett Military	Jolon	Military Bases
Growers Co	Salinas	Fruits & Vegetables & Produce-Retail
Hilltown Packing Co Inc	Salinas	Harvesting-Contract
Mann Packing Co Inc	Salinas	Fruits & Vegetables-Growers & Shippers
Mee Memorial Healthcare System	King City	Hospitals
Middlebury Institute-Intl Stds	Monterey	Schools-Universities & Colleges Academic
Misionero Vegetables	Gonzales	Fruits & Vegetables-Growers & Shippers
Monterey Bay Aquarium Restaurant	Monterey	Zoos
Monterey County Public Works	Salinas	Government Offices-County
Monterey County Social Services Dept	Salinas	Government Offices-County
Monterey Mushrooms	Royal Oaks	Mushrooms
Monterey Peninsula College	Monterey	Junior-Community College-Tech Institutes
Natividad Medical Center	Salinas	Hospitals
Pebble Beach Company	Pebble Beach	Hotels & Motels
Pebble Beach Resorts	Pebble Beach	Resorts
Premium Packing Inc	Salinas	Labor Contractors
Quality Farm Labor	Gonzales	Labor Contractors
R C Packing	Gonzales	Packing & Crating Service
Salinas Valley Memorial Healthcare	Salinas	Health Care Management
US Defense Dept	Seaside	Government Offices-Federal

**Table 6F Top Employers in Santa Cruz**

<b>Employer Name</b>	<b>Location</b>	<b>Industry</b>
Employer Name	Location	Industry
Ameri-Kleen	Watsonville	Services NEC
Audiology Associates	Soquel	Clinics
Cabrillo Sesnon House 1	Aptos	Caterers
Creekside Farms Inc	Watsonville	Farms
Dominican Hospital	Santa Cruz	Hospitals
First Alarm	Aptos	Burglar Alarm Systems-Wholesale
Granite Construction Co	Watsonville	General Contractors
Granite Construction Inc	Watsonville	Construction-Building Contractors
Graniterock	Watsonville	Asphalt & Asphalt Products
Larse Farms Inc	Watsonville	Fruits & Vegetables-Growers & Shippers
Monterey Mushrooms LLC	Watsonville	Mushrooms
North County Mental Health	Santa Cruz	Government Offices-County
Operations Department	Santa Cruz	Transit Lines
Pajaro Valley Unified School District	Watsonville	School Districts
Plantronics Inc	Santa Cruz	Telephone & Telegraph Apparatus-Manufacturing
Safeway	Soquel	Grocers-Retail
Salud Para La Gente	Watsonville	Clinics
Santa Cruz County Sheriff	Santa Cruz	Government Offices-County
Santa Cruz Governmental Center	Santa Cruz	Government Offices-County
Santa Cruz Health Center	Santa Cruz	Clinics
Santa Cruz Metro	Santa Cruz	Bus Lines
Source Naturals	Scotts Valley	Vitamin Products-Manufacturing
University of CA Santa Cruz	Santa Cruz	Schools-Universities & Colleges Academic
Watsonville City Sewer Dept	Watsonville	City Government-Regulation & Administration
Watsonville Community Hospital	Watsonville	Hospitals

## Annex 7: Local and Regional Plans and Reports Reviewed

The below table lists reports that Uplift reviewed to inform its understanding of current regional strategies.

Report Name	Report Type
City of Santa Barbara Economic Development Plan Draft (2021)	Economic Development
City of Santa Cruz Economic Development Strategy Draft (2021)	Economic Development
County of Monterey CEDS 2021-2026 (2021)	Economic Development
County of San Benito Draft CEDS 2023-2027 (2023)	Economic Development
County of Santa Cruz CEDS 2020-2025 (2020)	Economic Development
County of Ventura CEDS 2019-2024 (2019)	Economic Development
County of Ventura Economic Vitality Strategic Plan Progress Update (2019)	Economic Development
County of Ventura Economic Vitality Strategic Plan (2017)	Economic Development
REACH 2030: An Action Plan for Central Coast Job Creation (2020)	Economic Development
Santa Ynez Band of Chumash Mission Indians CEDS for the Santa Ynez Valley (2020)	Economic Development
City of Hollister General Plan 2040: Public Review Draft (2023)	General Plan
City of Monterey Annual Action Plan Draft (2023)	General Plan
City of Goleta Draft Situation Assessment Themes (2022)	General Plan
City of Salinas Alisal Vibrancy Plan (2020)	General Plan
City of Salinas Economic Development Element (2017)	General Plan
City of Santa Barbara General Plan Progress Report (2022)	General Plan
City of Ventura GPU Draft Vision (2022)	General Plan
County of Monterey Annual Progress Report on the 2010 General Plan Implementation (2021)	General Plan
County of Santa Cruz Strategic Plan (2018)	General Plan
County of San Benito 2035 General Plan (2015)	General Plan
County of Ventura 2040 General Plan (2020)	General Plan
Cuyama Valley Community Action Plan (2022)	General Plan
Regions Rise Together Salinas Investment Blueprint (2021)	General Plan
BAE Urban Economics and Sustainable Agriculture Education, Economic Contributions of Ventura County Agriculture (2022)	Industry-Specific: Agriculture
County of Ventura, Resilient Agricultural Lands Initiative: A Strategic Plan to Build Community Resilience (2023)	Industry-Specific: Agriculture
Oxnard World Trade Center, Ventura and Santa Barbara Counties: The Global Food and Agriculture Economy (n.d.)	Industry-Specific: Agriculture
REACH, Economic Impact of the Agriculture and Agtech Sector in the Central Coast (2023)	Industry-Specific: Agriculture
UC ANR, 2020-2025 Strategic Plan (2022)	Industry-Specific: Agriculture
UC ANR, 2020-2025 REC System Strategic Framework (2020)	Industry-Specific: Agriculture
Building a Thriving Space Enterprise on the Central Coast of California: Commercial Space Master Plan for Vandenberg SFB (2021)	Industry-Specific: Aerospace/Defense
Monterey Bay Defense Alliance, Contributions of the Military to the Monterey County Economy (2020)	Industry-Specific: Aerospace/Defense
REACH, Economic Impact of the Aerospace, Defense, and Precision Manufacturing Sector in the Central Coast (2023)	Industry-Specific: Aerospace/Defense

Report Name	Report Type
REACH, Economic Impact of Vandenberg AFB on Santa Barbara and San Luis Obispo Counties (2021)	Industry-Specific: Aerospace/Defense
CAUSE, Port of Hueneme Expansion: How Would it Impact Us? (2019)	Industry-Specific: Other Industries
Commercial Fishermen of Santa Barbara, The Maritime Collective: A Fisheries Economic Development and Infrastructure Initiative (n.d.)	Industry-Specific: Other Industries
County of Santa Cruz WDB and Santa Cruz Works, Santa Cruz Tech Sector and Ecosystem (2018)	Industry-Specific: Other Industries
County of Ventura, Enabling Ventura County's Entrepreneurial Ecosystem (2018)	Industry-Specific: Other Industries
EDC, Report on the Ventura and Santa Barbara Creative Economies (2020)	Industry-Specific: Other Industries
Lightcast, REACH Economic Impact Analysis: Clean Technology Sector (2022)	Industry-Specific: Other Industries
REACH, Economic Impact of Offshore Wind Farm Development on the Central Coast of California (2021)	Industry-Specific: Other Industries
CARB Scoping Plan for Achieving Carbon Neutrality (2022)	Climate
Central Coast Climate Collaborative Strategic Vision (2021)	Climate
City of Hollister Climate Action Plan: Public Review Draft (2023)	Climate
City of San Luis Obispo Climate Action Plan: Work Program (2023)	Climate
City of San Luis Obispo, Lead by Example: A Plan for Carbon Neutral City Operations (2021)	Climate
City of Santa Cruz 2030 Climate Action Plan (2022)	Climate
City of Ventura Climate Action and Resilience Plan (2022)	Climate
County of Santa Cruz Climate Action and Adaptation Plan (2022)	Climate
Santa Ynez Band of Chumash Indians, Fostering Co-Management for Biocultural Resilience and Climate Adaptation (2022)	Climate
Central Coast Alliance United for a Sustainable Economy (CAUSE), Five-Year Strategic Plan 2023-2027 (2023)	Community
CAUSE, Mental Health Student Survey (2019)	Community
CAUSE, Housing Crisis 805 (2019)	Community
CAUSE, Santa Maria 2040 (2019)	Community
CAUSE, Santa Paula Youth Town Hall: Youth Voices! Youth Choices! (2018)	Community
The Fund for Santa Barbara et al., Towards a Just and Equitable Central Coast (2022)	Community
United Ways of California, The Real Cost Measure in California (2023)	Community
BW Research Partnership, San Luis Obispo County WDB Industry, Economic & Workforce Research (2018)	Workforce
EDC, Careers in Global Trade and Logistics (2020)	Workforce
North Central Coast Regional Planning Unit, Workforce Innovation and Opportunity Act (WIOA) 4-Year Regional Planning Unit Plan, 2021-2024 (2021)	Workforce



Report Name	Report Type
North Central Coast Regional Planning Unit, WIOA 4-Year Regional Planning Unit Two-Year Modification, 2023-2024 (2023)	Workforce
Santa Cruz County WDB, State of the Workforce (2022 and 2023)	Workforce
South Central Coast Regional Planning Unit, WIOA 4-Year Regional Planning Unit Plan, 2021-2024 (2021)	Workforce
South Central Coast Regional Planning Unit, WIOA 4-Year Regional Planning Unit Two-Year Modification 2023-2024 (2023)	Workforce
Santa Barbara County WDB and the Santa Barbara Foundation, Santa Barbara County COVID-19 Impact Report (n.d.)	Workforce
WDB of Ventura County, Goals and Objectives 2019-2022 (2019)	Workforce
WIOA Local Plans 2021-2024: Monterey, San Benito, San Luis Obispo, Santa Barbara, Santa Cruz, and Ventura County WDBs (2021)	Workforce

## Annex 8: Uplift Team



**PROJECT DIRECTOR**  
Quinn Brady



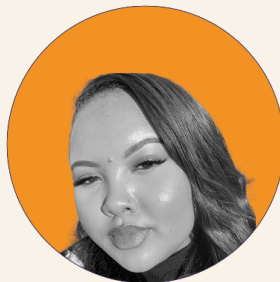
**PROJECT MANAGER**  
Lady Freire



**COMMUNITY ENGAGEMENT  
MANAGER, EDC**  
Alondra Gaytan



**COMMUNITY ENGAGEMENT  
MANAGER, MBEP**  
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**REGIONAL CONVENER,  
REACH**  
Melissa James



**REGIONAL CONVENER,  
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Bruce Stenslie



**REGIONAL CONVENER,  
MBEP**  
Tahra Goraya



**ACCOUNTS & CONTRACTS, EDC**  
Monica Estrella



**ADMINISTRATIVE COORDINATOR**  
Jordan Rice

## Annex 9: State Requirements Matrix

Requirement	Description	Page #
Stakeholder Mapping	<p>A snapshot of the historically active stakeholders that can influence creating a High Road economy in the CERF Region and/or benefit from it. The stakeholder should:</p> <ul style="list-style-type: none"> <li>• Provide the list of organizations and entities and discuss their potential role in developing the plan and engaging in the Implementation Phase. These stakeholders may include but are not limited to employers, businesses, community-based organizations, community members and residents, government and economic development agencies, labor organizations, philanthropic organizations, academic institutions, education and training providers, workforce entities, and industries.</li> <li>• Overview of the state of disinvested communities in the region. Discuss how and in which areas these communities face economic barriers. Include a snapshot of the plan to outreach to organizations that represent these communities and how the HRTC intends to ensure their active participation.</li> <li>• Create and show a network of existing partners and their existing regional and sub-regional plans, strategies, and related reports to demonstrate synergies, potentials, and challenges</li> <li>• Clarify opportunities for collaborations and partnerships</li> </ul>	89 - 104

Requirement	Description	Page #
<p>Regional Summary: A summary background of the demographic and socio-economic conditions of the region, highlighting areas with low and high economic diversification and resiliency, as well as any industry trends that impact the regional economy. The regional summary must identify regional inequities, such as economic, health, and environmental inequities, currently facing communities in the region.</p>	<p>Economy and Economic Development Analysis</p> <ul style="list-style-type: none"> <li>• Identify economic development opportunities and forces in the region</li> <li>• Review inequities in economic development across the region</li> <li>• Identify major low- and high- wage industries and occupations in the region</li> <li>• Explore economic well-being and cost of living across the region</li> <li>• Economic Shocks: Discuss the impacts caused by economic shocks (e.g., pandemics, natural disasters) or longer-term economic shifts (e.g., global market signals, automation, policy levers) in the region. These include economic harm to communities (i.e., workers, small businesses, impacted industries, the public sector, and selected regions and populations) as well as the potential for new economic development opportunities</li> </ul>	<p>28 – 52</p> <p>(Other components of this requirement are elsewhere in this section and woven throughout the report)</p>
	<p>Climate and Environmental Impact Analysis: Identify anticipated climate impacts and the factors that increase the region’s vulnerability to those impacts</p> <ul style="list-style-type: none"> <li>• Identify short term and long-term impacts of climate change on the people and economy of the region. These include disproportionate impacts on disinvested communities and expected increases in occupational hazards for workers</li> <li>• Identify major sources of air pollution, water pollution, toxic and hazardous waste and their impacts on diverse communities, especially disinvested communities.</li> <li>• Identify major sources of Greenhouse Gas (GHG) emissions and their impacts on diverse communities, especially disinvested communities</li> <li>• Assess impacts of climate change on targeted emerging industries, sectors, or clusters and how these impacts might hinder success of the proposed plans and transition strategies (e.g., damage to</li> </ul>	<p>68 - 82</p>

Requirement	Description	Page #
	<p>critical infrastructure, loss of productivity, loss of population)</p> <p>Public Health Analysis</p> <ul style="list-style-type: none"> <li>• Provide a snapshot of the impacts of the current economic trends and climate change effects on public health, especially the impacts on disinvested communities</li> <li>• Explore the main causes of chronic illnesses and diseases in the region, and whether and how they are related to economic inequalities, climate impacts, environmental factors, etc.</li> <li>• Analyze health disparities across the region, disaggregated by race, gender, and other demographics</li> </ul>	82 - 88
Labor Market Analysis	<p>A snapshot of labor and workforce dynamics in the region, including an overview of major employers, occupations, and wages, the impacts of the recent trends, changes, and forces on the labor market, and projected labor trends in existing key industries. The analysis must also identify the following:</p> <ul style="list-style-type: none"> <li>• Industry-specific labor standards that meet high-road priorities</li> <li>• Barriers that limit access to high-quality jobs</li> <li>• Relevant training programs, apprenticeships, or high road training partnerships in the region</li> </ul>	146 - 155
Industry Cluster Analysis	<p>A snapshot of current major industries as well as industry trends and projections. The analysis must also:</p> <ul style="list-style-type: none"> <li>• Include an in-depth analysis of potential growth clusters based on the region’s comparative advantages, market trends, workforce, infrastructure assets, policy trends, aligned state/federal investments, supply chain, and innovation ecosystem</li> <li>• Identify major sources of GHG emissions, air and water pollution, and toxic or hazardous waste from existing or proposed clusters</li> </ul>	156 - 163

Requirement	Description	Page #
	<ul style="list-style-type: none"> <li>• Conduct measurements of potential for job growth within industries</li> <li>• Identify workers and sectors at risk of displacement due to identified trends and analyses</li> </ul>	
SWOT Analysis	An in-depth analysis of regional Strengths, Weaknesses, Opportunities, and Threats (i.e., SWOT), especially as it relates to equitable economic resilience and growth of sustainable industry clusters. The SWOT analysis will draw from data and components through conducting the above analyses.	169 - 170

## Annex 10: Methodology

This report is based on quantitative and qualitative analysis, along with extensive community engagement, conducted between May and December 2023.

Research focused on five categories established by the State of California: economy and economic development, environment and climate, public health, labor market, and industry clusters. Additional analysis was also conducted exceeding State requirements, such as in-depth review of regional innovation assets and growth capital trends. In some cases, analyses overlapped across categories and addressed multiple State requirements.

Given the geographic scale of the Central Coast Region, focus on regional economic development, and data availability, most quantitative analysis was conducted at the county-level. Where possible, qualitative insights provided more localized information.

### **Quantitative Research**

Quantitative analysis of the region's economic performance was conducted as a baseline to assess **economy and economic development dynamics**, including the overall strength of the region's economy, the performance of traded versus locally serving sectors, the connections between different sub-regions, and regional costs of living. Methods employed included shift-share decomposition analysis, which disaggregates the role of national and state performance in driving regional results (and pinpoints the "local share" of growth). Such analysis helps identify areas that are regional strengths, and which are buoyed by broader trends. See pages 117-118 ("Methodology: Regional Industry Performance") for additional details.

Proprietary databases such as Pitchbook, Dun & Bradstreet, Cambia's The Lens, Clarivate's Web of Science, and the Kauffman Foundation's Entrepreneurship Indicators were also leveraged to explore deeper industry dynamics, the performance of regional drivers of competitiveness, and barriers to economic success. A particularly intensive analysis of basic and translational research, along with growth capital dynamics, was undertaken to understand regional innovation strengths and their applicability to current and emerging economic opportunities.

Regional costs of living for a wide variety of family types – and identification of the shares and demographics of residents struggling to make ends meet – were established via customized analysis of the University of Washington's Self-Sufficiency Standard. This approach supplemented standard costs with taxable emergency savings and non-taxable retirement savings, reflecting a preference for enabling workers to achieve greater economic mobility. See additional discussion of this approach on pages 64-65 ("Methodology: Calculating a Self-Sufficiency Income").

**Labor market analysis** was built from the Brookings Institution's Opportunity Industries methodology for assessing the concentration of quality and promising jobs in regional industries. See additional discussion of this approach on pages 121-122 ("What Counts as a Quality Job"). Such analysis employed datasets spanning public and proprietary sources including the U.S. Census Bureau, the University of Washington's Self-Sufficiency Standard, and Lightcast.

Once the assessment of the concentration of quality and promising jobs in regional industries was complete, analysis was undertaken to understand talent needs and inform appropriate workforce and education responses to better connect workers to such jobs. This included:

- *Talent adjacency analysis* employing data from O\*NET to assess the similarity of pairs of the region’s industries and industry clusters based on the types and levels of talent required in the jobs of each industry or cluster. The similarity or “adjacency” of knowledge, skills, and abilities of a pair of industries indicates how easily workers in one industry may be able to fulfill job requirements in another. This can be useful if one of the industries is a strong economic development target, revealing how well existing workers are suited to potential job openings. The findings also suggest pairs of industries may benefit from similar workforce strategies. In this case, analysis is applied to determine how well-positioned workers are to fill positions in opportunity industries.
- *Talent alignment analysis* exploring the connection between the output of local institutions and the regional supply of quality and promising jobs is based on analysis of data compiled by the National Center for Educational Statistics (NCES) on program completions among colleges and universities. NCES provides lists of occupations suitable to graduates of each program of study. Additional customized analysis was completed matching these results to the occupational composition of Central Coast jobs to determine region-specific proportions of graduates across programs. This enabled the application of Opportunity Industries data on quality, promising, and other jobs to the analysis, showing the distribution of job quality among graduates both in the aggregate and in specific program areas. (Note: This analysis does not evaluate program or instructional, quality nor does it represent actual job outcomes of individuals. Rather, it provides an estimate of the extent to which opportunity jobs are available to graduates of each program in the regional economy.)

**Industry clusters analysis** focused on mapping linkages between industries and assessing areas of regional comparative advantage. This research applied machine learning methods to large datasets that describe intraregional supply chains and talent demand, revealing groups of industries that belong to the same regional value chain and groups of industries that have common talent needs, which are highly correlated with each other. Outputs of this analysis were then refined through a series of criteria (e.g., concentration of quality jobs), blending economic development leading practices and California Jobs First priorities, to identify opportunities for sustainable, equitable regional industry growth. See an additional explanation of this approach on pages 157-158.

**Environment and public health** reviews drew on a range of State and national data sources, including the State’s landmark CalEnviroScreen tool, the California Department of Public Health, the Centers for Disease Control and Prevention, and the University of Wisconsin’s Population Health Institute. Industry climate impacts were identified via analysis of IMPLAN input-output models and U.S. Environmental Protection Agency (EPA) data.

### **Qualitative Research**

Qualitative research started with a detailed literature review of dozens of existing economic development, workforce development, climate, and other strategic plans spanning the six-county region. This review provided a basis for understanding current priorities and alignment across organizations and jurisdictions. It further offered context for interpreting quantitative data. In-depth interviews with a wide range of intermediaries, program delivery and service providers, and others were also undertaken to interpret and refine directional information from quantitative analysis. Outputs of these interviews informed interpretations and implications across all research categories.