

SILICON VALLEY ALLIES RESEARCH BRIEF

APRIL 10, 2015

ENGLISH LANGUAGE LEARNER ADULTS IN SILICON VALLEY: COMMUNITY ASSETS, GAPS, AND CAREER PATHWAYS

EXECUTIVE SUMMARY

Over half of all working-age adults in Silicon Valley speak a language other than English at home. These multilingual communities are one of the region's greatest strengths, contributing to Silicon Valley's innovation, entrepreneurship, and role as a world center of technology and business.

A portion of these second language speakers are still in the process of learning English. English language learner adults are a remarkably diverse population, speaking over 77 different languages and living in significant numbers in nearly every city in Santa Clara and San Mateo Counties.

The continuing vitality of our region rests to a considerable extent on the adequacy of its educational and support system to enable these English language learner adults to develop English fluency, advance their educational goals, integrate into the economic mainstream, and follow pathways to family sustaining careers. This research report analyzes the scale and scope of the need, examines the capacity of the current educational landscape, and identifies potential gaps or areas where a shift in the system has potential to improve outcomes.

To meet this demand, Silicon Valley's communities have developed a robust network of educational and service providers. The system of public and private organizations providing

various types of education, training, and social services to English language learners includes hundreds of providers in Santa Clara and San Mateo Counties. Over 393 ESL classes are offered by at least 45 distinct providers, including adult schools, non-profits/CBOs, community colleges, library-based programs, other local government entities, and labor-management organizations.

Adult learners often face multiple barriers that stand in the way of achieving their educational or employment goals, ranging from lack of professional networking contacts in their career field of interest to childcare and transportation needs. Silicon Valley's educational and training providers offer a wide array of supportive services and assistance to help students succeed in their educational and career goals.

Finally, the collective language capacity of ELL providers is a major asset to Silicon Valley. In total, ELL providers have capacity to communicate with clients in over 50 languages, including all of the top ten languages spoken in the region. Several also use a "language line" phone service to help communicate with those clients who speak less common languages.

Adult schools are the workhorses of the adult basic skills system. They comprise the majority of agencies offering adult basic education and GED

preparation classes. Furthermore, adult schools were the only agencies surveyed to offer GED testing or high school diploma completion. Access to literacy, basic skills, GED preparation, and related classes is especially important for the region's adult English language learners because a large portion of ELLs do not have a high school degree and may have had very limited access to formal education as children.

Non-profits / community-based organizations (CBOs) vary widely with respect to programs and services; many provide ESL, vocational or other classes as well as services. CBOs are the only group of providers with significant capacity to provide immigration legal assistance. They are an important resource for supportive services. In addition, CBOs are the main source of linguistic and cultural capacity to reach smaller language communities (those who speak languages that are not among the most common in the region.)

Community colleges are the region's primary providers of vocational and postsecondary education for second language speakers. However, low English language ability is a barrier to enrolling in college-level courses. Non-credit ESL classes offered by some community colleges are a critical bridge between beginning/intermediate ESL and the higher level needed for college courses.

Workforce Investment Boards are the major providers of employment and career development services for Silicon Valley's unemployed and underemployed workers. However, there are barriers to cross-referral of ELLs between WIBs and other education providers.

Other providers that play important roles in linking ELLs to education and career include county and city governments, public libraries, and labor-management organizations such as apprenticeships and industry training trusts.

The ability to refer clients from one agency to

another is critical to the effective functioning of the ELL provider network. Virtually all ELL-serving agencies surveyed for this project both give and receive referrals. However, the need outpaces the total system-wide ability to serve all communities, and gaps remain.

Although there is a broad and deep network of educational opportunities and related services available to English language learner adults, it is clear that existing resources are not enough to meet the aggregate need, especially as the labor market continues to become even more competitive and more demanding of educational credentials as well as networking, customer service, or other relationship-based skills that depend heavily on facility and confidence in spoken and written English.

Among educational and service providers, 75% of agencies indicated that they occasionally or frequently have to turn away ELLs seeking services. A similar portion of agencies said they would benefit from expanding their referral capacity.

One area where expanding referral capacity has potential for considerable impact is in referrals from one type of agency to another type offering complementary services. By far the most frequently cited reason for being unable to serve a client was that he or she was seeking services not offered by that agency. Expanding cross-referrals could better connect ELLs with existing classes and services in the community.

For instance, a wider range of services are offered by non-profits than are typically available at educational institutions, such as immigration services, mental health, case management, and some kinds of supportive services. Closer collaboration could help students access the additional supports they need to overcome barriers and succeed in educational and career pathways.

A number of agencies in the region have already developed two-agency or multi-agency collaborations to great success; for example, several adult schools have built close relationships with community colleges to enable their students to seamlessly transition to the college once they have achieved proficiency at the adult school level. Expanding these models could enhance the system's capacity to not simply offer classes, but to help students move along pathways to educational and career goals.

However, although almost all agencies currently engage in cross-referrals, they experience considerable barriers in doing so. The top barrier to expanding cross-referrals is insufficient familiarity and connections between agencies, including lack of complete, accurate and up-to-date information on available classes and services, and lack of direct personal contacts or formal referral relationship.

The second major barrier to expanding referrals is insufficient resources or funding, encompassing both (1) lack of funding to accept a larger volume of referrals and (2) lack of the resources that would be needed to develop more robust information, relationships, and systems to enhance referrals. Along with over-enrollment and long waiting lists, this again indicates high demand relative to the limited resources available.

Other gaps relate to needs in particular communities or for particular language groups; even though classes and services may be available somewhere in the region, they are not necessarily accessible to all. Notably, the majority of agencies able to provide services in languages other than English and Spanish are in Santa Clara County, with language capacity in San Mateo County considerably more limited.

Among the most common unmet needs for adult ELLs are those impacted by public policies and larger social and economic systems: housing

assistance, affordable childcare, and immigration services. Local agencies have only limited ability to impact these issues.

Finally, access to employment services and labor market information was identified as a major gap in the pathway between ESL or adult education classes and career opportunities.

Labor market information and services, especially assistance with career navigation, are in high demand among English language learner adults. The steps needed to move from successfully completing an ESL or vocational classes to obtaining a job are rarely straightforward and clear, especially to ELLs who may not have the social or professional networks to connect them to career opportunities.

English language learner adults are an integral part of the Silicon Valley workforce. However, many ELLs are currently employed in very low-wage occupations that do not offer significant opportunities for advancement.

As a result, ELLs as compared to the overall Silicon Valley workforce are less likely to earn a living wage, less likely to have health insurance, and their households and families are more likely to be in poverty or low-income. Over half (52%) of employed ELLs earn less than \$30,000 per year.

Potential exists to connect ELLs to family-supporting careers. Significant job openings are projected in a number of "occupations of opportunity" in Silicon Valley, including occupations accessible without a college degree which typically pay \$15 to \$30 per hour.

The large majority of occupations of opportunity require at least a high school diploma. The prevalence of high school diploma as a requirement for entry highlights the importance of access to adult basic education classes, GED preparation, and adult high school completion programs for ELLs' ability to progress along a

career pathway.

There is considerable differentiation between ELLs' current access to the occupations of opportunity; some occupations employ very few ELLs, while in several occupations ELLs make up a major portion of the workforce. These data have multiple implications for ELLs, service providers, and policymakers:

- English learner adults seeking employment and careers are likely to find the greatest access in those jobs that currently employ substantial numbers of English learners. Job counselors assisting ELLs may also find more success in referring clients to jobs where being an English learner appears not to be a major barrier to entry.
- However, agencies developing longer-term sector strategies or career pathway programs may wish to consider the benefits of expanding opportunities for English learners by targeting education and career navigation to open up those occupations of opportunity where there are currently few ELLs employed.

- In those occupations which employ disproportionately few workers who speak another language at home – even when those workers are English fluent – there may be hidden barriers. In these occupations, there may be a role for employers to examine their recruitment and hiring processes.

Finally, while each of the occupations of opportunity has substantial growth potential, in the aggregate there is a dearth of job openings in occupations of opportunity relative to likely jobseekers. Region-wide, there are currently 1.1 million lower-wage workers in the Bay Area, yet only 30,900 middle-wage job openings per year. English language learners are thus likely to continue to face intense competition for these relatively scarce middle-wage job openings.

Through their frontline experience confronting these challenges, ELL-serving agencies may be well-positioned to play a more active role in the policy and strategic discussions now taking place in the region around new approaches to housing affordability, workforce development, and economic prosperity.

ABOUT THIS STUDY

This research brief is produced by Working Partnerships USA on behalf of the Silicon Valley Alliance for Language Learners' Integration, Education, and Success (SV ALLIES), a collaboration dedicated to supporting English learner adults to attain and succeed in family-sustaining careers through collective impact and collaborative systems change. SV ALLIES is funded by a Workforce Innovation Fund grant awarded to the County of San Mateo by the U.S. Department of Labor.

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INTRODUCTION

The Silicon Valley Alliance for Language Learners' Integration, Education, and Success (SV ALLIES) initiative was launched in September 2013 through a Workforce Innovation Fund grant awarded to the County of San Mateo by the Department of Labor. SV ALLIES is a collaboration dedicated to supporting English learner adults to attain and succeed in family-sustaining careers through collective impact and collaborative systems change.

In May 2014, SV ALLIES launched the Community Asset Referral System (CARS) project. The intent of CARS is to understand challenges and develop strategies to increase the potential for information sharing, relationships, and coordination among service providers, in order to support English language learner adults to more effectively access existing education, training, and support services.

Key research products generated in support of CARS include:

1. An asset map of existing education, training, and related programs and services, as well as provider-specific data;
2. Identification of industries and occupations of opportunity;
3. Demographic and socioeconomic data analysis; and
4. English Language Learner interviews to understand students' navigation of classes and systems, assets, needs, and barriers.

This report represents a synthesis of the findings from these four research products, along with focus groups and interviews held with ALLIES member organizations. Its purpose is to provide an overview of the landscape of educational and career-related programs and services available to English language learner adults; assess the ways in which these services are meeting the needs of the region's English language learner adult populations, and what gaps remain; identify accessible growth occupations which may present opportunities for ELL adults to be better able to meet their economic needs; and finally, examine current efforts and challenges related to coordination and cross-referrals among educational and service providers.

The remainder of the report is divided into three sections:

- **Who Are Silicon Valley's English Language Learners?**
- **Landscape of Agencies Serving Adult English Language Learners**
- **Workforce and Career Opportunities**

What is an "ELL"?

An English Language Learner, or ELL, refers broadly to any speaker of another language who is in the process of learning English.

Because the SV ALLIES project is aimed at career and employment pathways, in this analysis we have focused on adults in their prime working years. For the purpose of this brief, an ELL is defined as an individual aged 18 to 64 who speaks a language other than English at home and speaks English less than "very well."

WHO ARE SILICON VALLEY'S ENGLISH LANGUAGE LEARNERS?

Over half of all working-age adults in Silicon Valley speak a language other than English at home. With over 77 languages spoken, the geographic, demographic, and socioeconomic characteristics of these communities form a complex landscape.

The majority of non-native speakers in Silicon Valley are fluent in English as a second (or third, fourth or fifth) language. This report is focused primarily on the remaining population of all those nonelderly adults living in Santa Clara or San Mateo counties who have not yet reached English fluency. These 373,097 people comprise the region's adult English language learners (ELLs).

English language learner adults are an integral part of the Silicon Valley economy and community. They comprise 21% of all working adults in San Mateo and Santa Clara counties, and 11% of all adults enrolled in education or training. Nearly half of English language learner adults are U.S. citizens. And 53% of all children (ages 5-17) live in a household where a language other than English is spoken at home.

The following sections provide an overview of the demographic characteristics and geographic distribution of English language learner adults in San Mateo and Santa Clara Counties.

DEMOGRAPHICS: KEY FINDINGS

Languages Spoken

- Over 77 different home languages are spoken by English language learners in Silicon Valley.
- Among the most common are Spanish, Vietnamese, Chinese/Mandarin, Tagalog and Cantonese.

Educational Levels

- 25% of Silicon Valley's ELL adults have a bachelor's or advanced degree.
- 18% have some college or an associate's degree.
- 57% have a high school diploma or less.

Residency and Citizenship

- 96% of Silicon Valley's ELL adults have lived in the United States for at least a year.
- Just under half (47%) of ELL adults are U.S. citizens.

Employment and Income

- Three-quarters of ELL adults in Silicon Valley are working or looking for work.
- Nearly half (47%) of ELL adults have household incomes below 250% of the federal poverty level.

Geographic Distribution

- Spanish-speaking ELLs live across Silicon Valley and are a significant population in nearly every city.
- Cantonese- and Russian-speakers are most concentrated in north/central San Mateo.
- Tagalog-speakers are most concentrated in north San Mateo and east Santa Clara.
- Vietnamese-speakers are concentrated in central and east San Jose.
- Korean-speakers are most concentrated in west San Jose.

DEMOGRAPHICS: LANGUAGES SPOKEN

- **Over half of all working-age adults in Silicon Valley speak a language other than English.**
- **Out of those non-native speakers, 58% are fluent in English.**
- **The remaining 42% (373,097 people) comprise the region’s adult English language learners (ELLs).**
- **Over 77 different home languages are spoken by ELLs in Silicon Valley. Among the most common are Spanish, Vietnamese, Chinese/Mandarin, Tagalog, and Cantonese.**

The linguistic landscape in Silicon Valley is among the most diverse in the nation. At least 77 different languages are spoken at home in San Mateo or Santa Clara Counties.¹ Among adults aged 18-64, a total of 881,776 residents – 52.6% of the population – speak a language other than English at home. Well over half (58%) of those individuals are also fluent in English.

English fluency ranges widely by language community. Among adults aged 18-64, only 36% of Vietnamese speakers are English fluent, while on the opposite extreme, 92% of adult Tamil speakers are English fluent. Spanish-speakers – by far the largest language community in the region – fall in the middle of the range with just

over half (50.3%) of adult Spanish speakers fluent in English.

Focusing in on those who are not fluent in English, there are an estimated 373,097 adults aged 18-64 who speak English less than “very well”. In the remainder of this brief, we will refer to this group as “English Language Learner adults (ELLs).”

The table below shows the top 10 languages spoken by English language learners in the region, along with the number of speakers in each county. In total, 88% of all English language learners speak one of these top ten as their primary language.

Top 10 Languages Spoken by English Language Learners in Silicon Valley (Ages 18-64)			
Primary Language Spoken	Total Number of People	San Mateo County Residents	Santa Clara County Residents
Spanish	162,813	51,620	111,193
Vietnamese	56,354	1,398	54,956
Chinese	37,584	10,980	26,604
Tagalog	20,891	6,889	14,002
Mandarin	13,954	2,979	10,975
Cantonese	11,635	5,974	5,661
Korean	8,268	1,216	7,052
Japanese	6,993	1,620	5,373
Russian	5,174	2,098	3,076
Hindi	5,120	1,480	3,640
All other languages	44,311	12,117	32,194
TOTAL ELL ADULTS	373,097	98,371	274,726

DEMOGRAPHICS: GEOGRAPHIC DISTRIBUTION

- **Spanish-speaking ELLs live across Silicon Valley.**
- **Cantonese-speaking and Russian-speaking ELLs are both concentrated in northern /central San Mateo County.**
- **There is a significant concentration of Tagalog-speaking ELLs in northern San Mateo County, as well as in eastern Santa Clara County.**
- **Vietnamese-speaking ELLs live almost exclusively in Santa Clara County, primarily in the east as well as in central San Jose.**
- **Korean-speaking ELLs predominantly live in western Santa Clara County.**

Adult English language learners are not evenly distributed across Silicon Valley. Rather, each language community has a different distributional pattern; some are clustered in just one or a handful of cities, while others are spread across the entire region.

These geographic distributions have implications for access to English classes and other educational opportunities, as well as for the varying demands on educational and service providers in different areas of the region.

Spanish-speakers, who make up 44% of all adult

ELLs, are widely spread across Silicon Valley. In almost every sub-area of the region, Spanish is the most common language spoken by ELLs.

However, some other common languages, including Cantonese, Vietnamese, Tagalog, Korean, and Russian, are more concentrated in particular neighborhoods.

The table below lists the top sub-area in each county that is home to the largest community of ELL adults speaking each language (The sub-areas are defined by the U.S. Census Bureau.²)

Sub-Areas with Largest Communities of ELL Adults by Language Spoken				
Language	Top Area Where Spoken (SCC)	Number of Speakers in Top Area (SCC)	Top Area Where Spoken (SMC)	Number of Speakers in Top Area (SMC)
Cantonese	Milpitas & San Jose (Northeast)	1,438	Daly City, Pacifica & Colma	2,469
Chinese	Milpitas & San Jose (Northeast)	4,951	Daly City, Pacifica & Colma	3,676
Hindi	Sunnyvale & San Jose (North)	1,145	Burlingame & Millbrae	655
Japanese	San Jose (SW/Almaden Valley)	1,005	San Mateo (South) & Half Moon Bay	764
Korean	San Jose (W. Central) & Campbell	1,438	Menlo Park, East Palo Alto & Atherton	519
Mandarin	San Jose (Northwest) & Santa Clara	2,001	Menlo Park, East Palo Alto & Atherton	804
Russian	Mountain View, Palo Alto & Los Altos	910	South SF, San Bruno & Brisbane	713

Spanish	San Jose (E. Central/E. Valley)	19,811	Menlo Park, East Palo Alto & Atherton	13,091
Tagalog	Milpitas & San Jose (Northeast)	3,091	Daly City, Pacifica & Colma	4,465
Vietnamese	Milpitas & San Jose (Northeast)	10,204	San Mateo (South) & Half Moon Bay	448

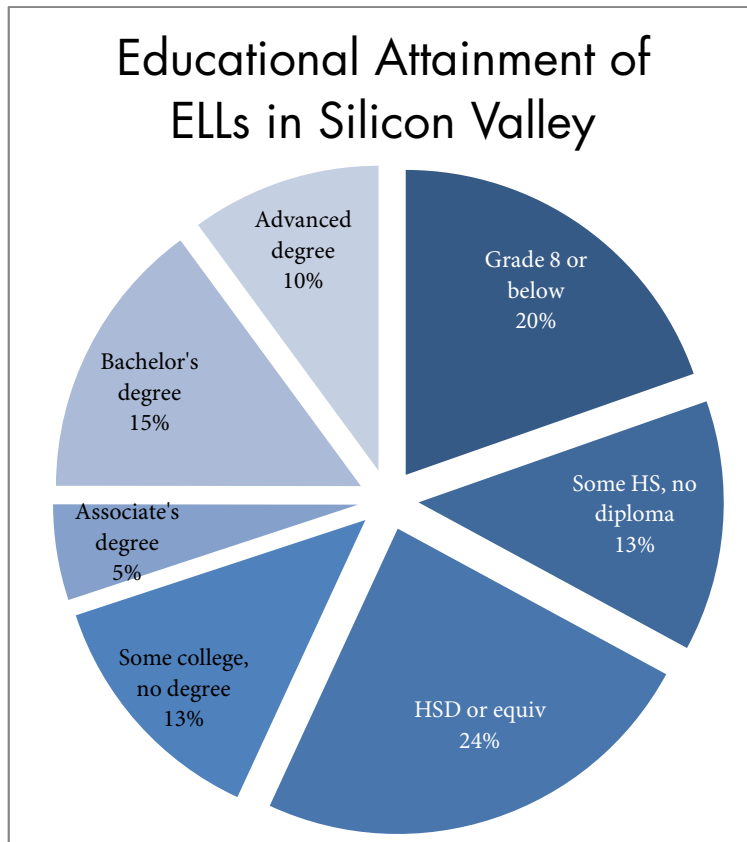
DEMOGRAPHICS: EDUCATIONAL LEVELS

- In aggregate, 25% of Silicon Valley’s ELLs have a bachelor’s or advanced degree, 18% have some college or an associate’s degree, and 57% have a high school diploma or less.
- Virtually all (91%) of Tagalog-speaking ELLs have a high school diploma, compared to just 42% of Spanish-speaking ELLs.
- 59% of Vietnamese-speaking ELLs have never attended college.
- 62% of Chinese/Mandarin-speaking ELLs have an associate’s, bachelor’s or higher degree.

Silicon Valley’s adult English language learners are extremely diverse not only linguistically, but also in their current educational levels. While over half (57%) of adult ELLs have never attended college, another 25% of ELLs have a bachelor’s or advanced degree.

Spanish-speaking ELLs, 57% do not have a high school diploma, which can pose a significant impediment to further education as well as to career opportunities. At the other extreme, 53% of Chinese/ Mandarin-speaking ELLs have a bachelor’s or advanced degree.

This wide range of educational levels indicates that there is no “one size fits all” educational approach to ELLs. Those with less than a high school education may be most in need of basic skills classes, while those with college degrees might benefit from assistance in understanding how to translate their degrees and experience from another country to enable them to find employment in their field.



The charts here and on the following pages show educational attainment of ELLs in total and by primary language spoken.

We also analyzed educational attainment by gender. Among ELLs overall little gender difference was evident. However, within specific language communities there may be educational

Educational attainment patterns also differ between language communities. Among

differences by gender. For instance, among Vietnamese-speaking ELLs, 62% of women have a high school diploma or less, compared to 55% of men.

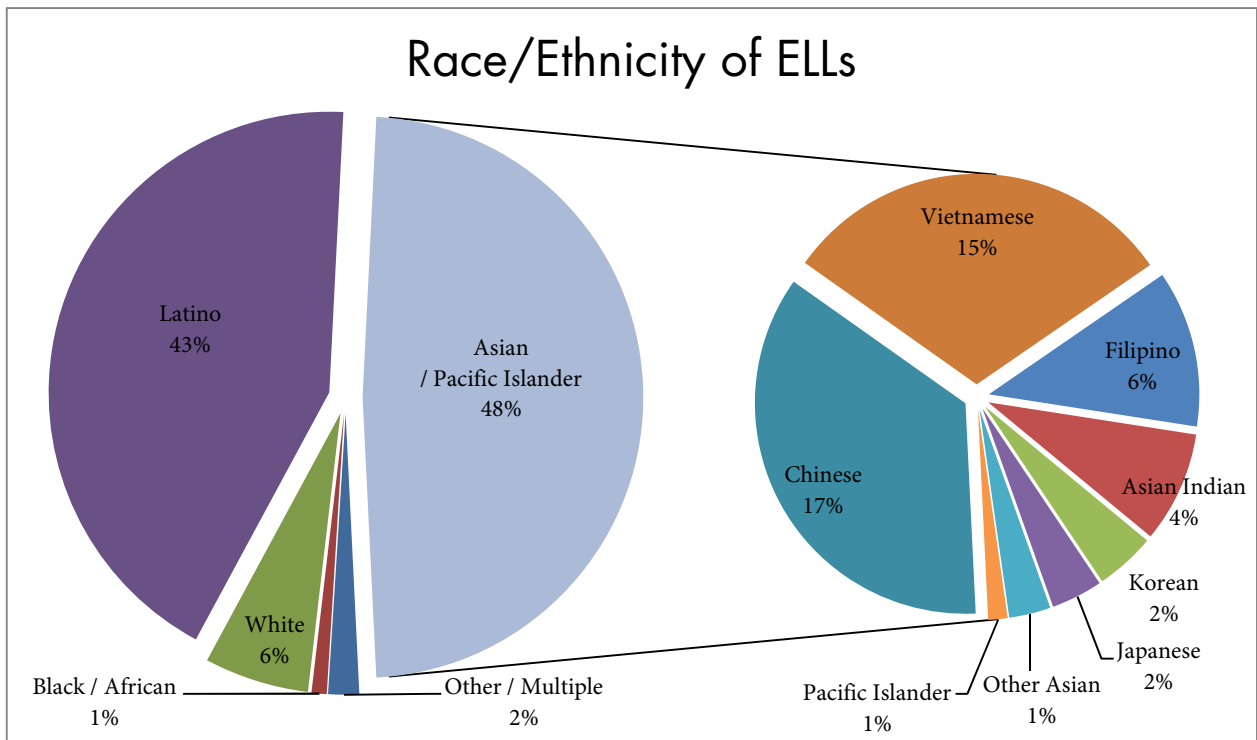
DEMOGRAPHICS: RACE / ETHNICITY

- **Approximately 43% of Silicon Valley ELLs identify as Hispanic or Latino, and 48% as Asian/Pacific Islander.**
- **Among Asian ELLs, roughly one-third identify as Chinese, one-third as Vietnamese, and substantial portions as Filipino, Indian, Korean, or Japanese.**

The ethnic makeup of adult English Language learners in Silicon Valley likewise reflects the diversity of the regions’ immigrant communities.

The large majority of ELLs identify as either Latino or Asian/Pacific Islander, with smaller portions identifying as Black/African, white, some other race or multi-racial.

Within each of these broad categories there is great variability. For example, within the overall category of “Asian”, major populations of ethnic groups include Chinese, Vietnamese, Filipino, Indian, Korean, Japanese, and Pacific Islander, as well as dozens of other communities with smaller populations. Each of these communities has distinct cultural and demographic characteristics.



DEMOGRAPHICS: RESIDENCY AND CITIZENSHIP

- **Nearly half (47%) of ELLs are U.S. citizens.**
- **An estimated 148,000 undocumented adults live in Silicon Valley (not all of whom are ELLs).**
- **45% of undocumented adults are projected to be potentially eligible for temporary legal status under the President's 2014 order for Administrative Relief.**

Needs and barriers for ELLs also differ depending on the circumstances of their arrival in the United States and their current status as U.S. citizens, permanent residents or a temporary visa or other less secure status.

There have been considerable public and community efforts in the region to support and encourage immigrants in the application process to become naturalized U.S. citizens. Currently, nearly half (47%) of ELLs in Silicon Valley are U.S. citizens.

The portion of ELLs who are U.S. citizens varies widely across language communities. As shown in the graph on the next page, only 27% of Spanish-speaking ELLs are U.S. citizens, compared with 60% of Chinese/Mandarin and Tagalog speakers, 78% of Vietnamese speakers, and 86% of Cantonese speakers. This disparity is likely due primarily to differences in eligibility status, although access to resources could also be a contributing factor.

Citizenship status has a considerable impact on employment and career opportunities, and may also affect eligibility for some educational programs or services. ELLs with U.S. citizenship tend to work in better-paying jobs and have higher incomes compared to other ELLs.

Of the remaining ELLs who are non-U.S. citizens, it is likely that fewer than half are currently eligible for citizenship. They may be legal permanent residents or hold varying types of visas, including temporary work visas such as

H-1Bs, or student or family visas that do not allow for employment.

Silicon Valley is also home to sizeable populations who arrived here as refugees or asylees. Refugees and asylees typically have access to dedicated services and supports. However, they may also face unique challenges, ranging from the economic impacts of arriving in the United States as a refugee, which often means coming without the ability to make any advance arrangements or to bring any assets or possessions; to the deep psychological impacts of the traumatic experiences endured by many refugees prior to arriving in the U.S.

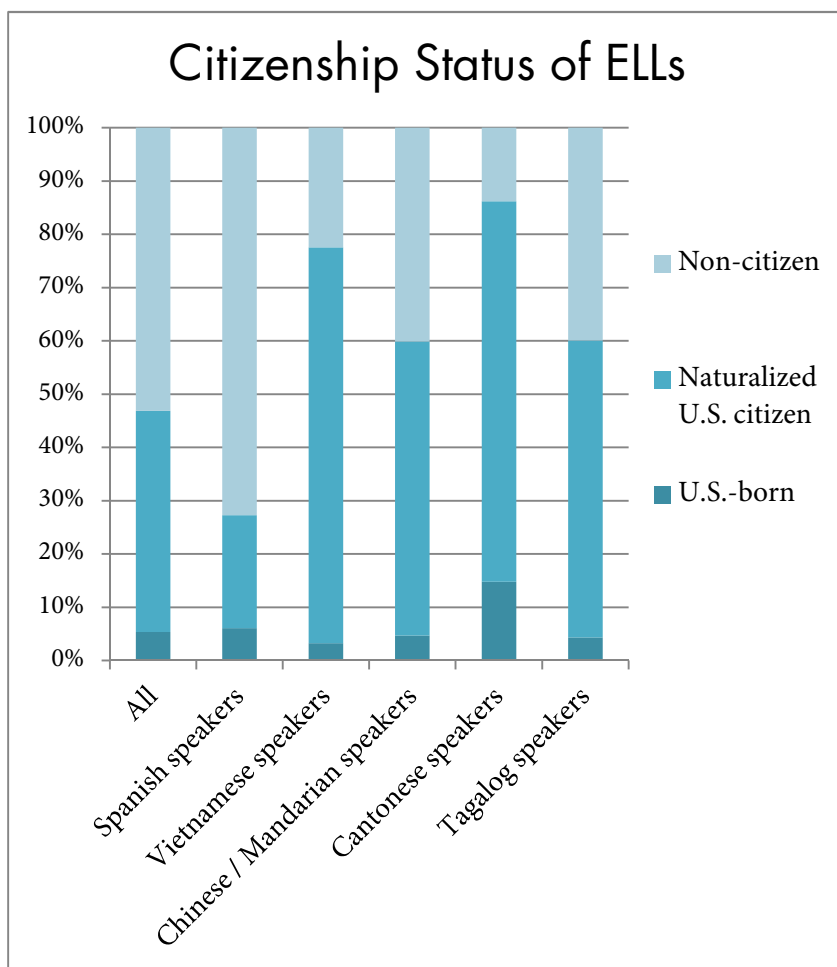
Finally, a portion of ELLs do not have current legal documentation to live and work in the United States. There is no data directly available on the portion of ELLs who are undocumented. However, there have been estimates made of the total undocumented population in Silicon Valley.

The Migration Policy Institute estimates that there are a total of 148,000 undocumented residents age 18 and over in Silicon Valley, 104,000 who live in Santa Clara County and 44,000 who live in San Mateo County.³

Based on available data, the Migration Policy Institute estimates that up to 73,000 undocumented residents in the two counties may be eligible for deferred action, of whom at least 67,000 are age 18 and over.

A number of these residents may be eligible for temporary immigration status under the deferred action (administrative relief) programs announced by the Obama Administration, including the original Deferred Action for

Childhood Arrivals (DACA) program established in 2012 as well as the expansion and new program announced in November 2014.



DEMOGRAPHICS: INCOME AND POVERTY

- **Nearly half (47%) of nonelderly adult English language learners have household incomes below 250% of the federal poverty level.**

Due primarily to their concentration in lower-wage jobs, English language learners tend to have lower household incomes and are more likely to be in poverty compared to the overall Silicon Valley population.

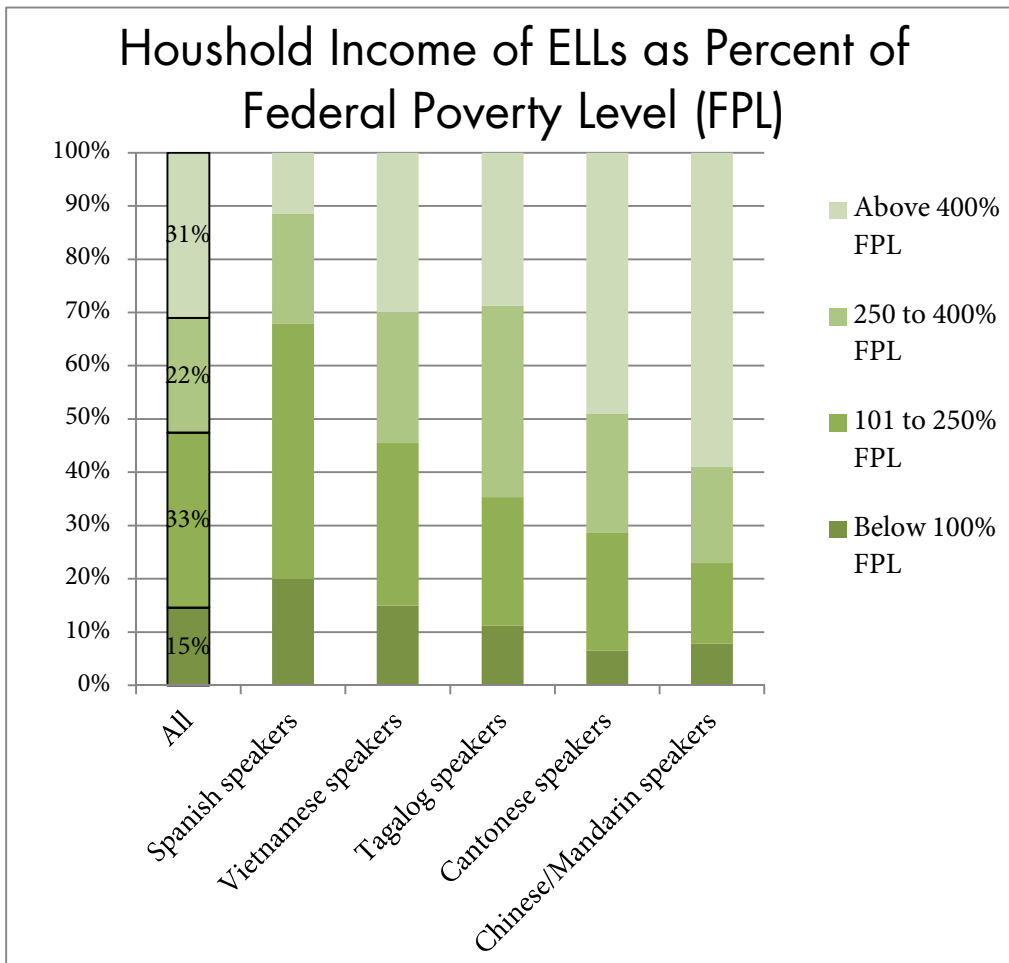
Among adult ELLs (aged 18-64), 15% have household incomes below the federal poverty level (FPL) – a level which in high-cost Silicon Valley indicates extreme poverty.⁴ This is considerably higher than the 9% poverty rate of the total adult population (ages 18-64).

Another 33% of adult ELLs have incomes between 100% and 250% of the Federal Poverty Level (FPL),⁵ meaning they are likely to be very

low-income and struggling to meet basic necessities of food, rent, utilities, transportation and childcare. In total, 47% - nearly half – of all adult ELLs have incomes below 250% of poverty, compared to just 28% of the overall adult population.

On the other end of the spectrum, only 31% of adult ELLs have incomes above 400% FPL, compared to 57% of the overall adult population.

Among the largest language communities, Spanish-speakers are the most likely to be low-income, with 20% below the poverty line and a total of 68% below 250% FPL. They are followed



by Vietnamese speakers (45% below 250% FPL) and Tagalog speakers (35% below 250% FPL). Cantonese speakers are less likely to have low incomes, and Mandarin or Chinese speakers are the least likely, as shown in the graph at left.

LANDSCAPE OF AGENCIES SERVING ADULT ENGLISH LANGUAGE LEARNERS

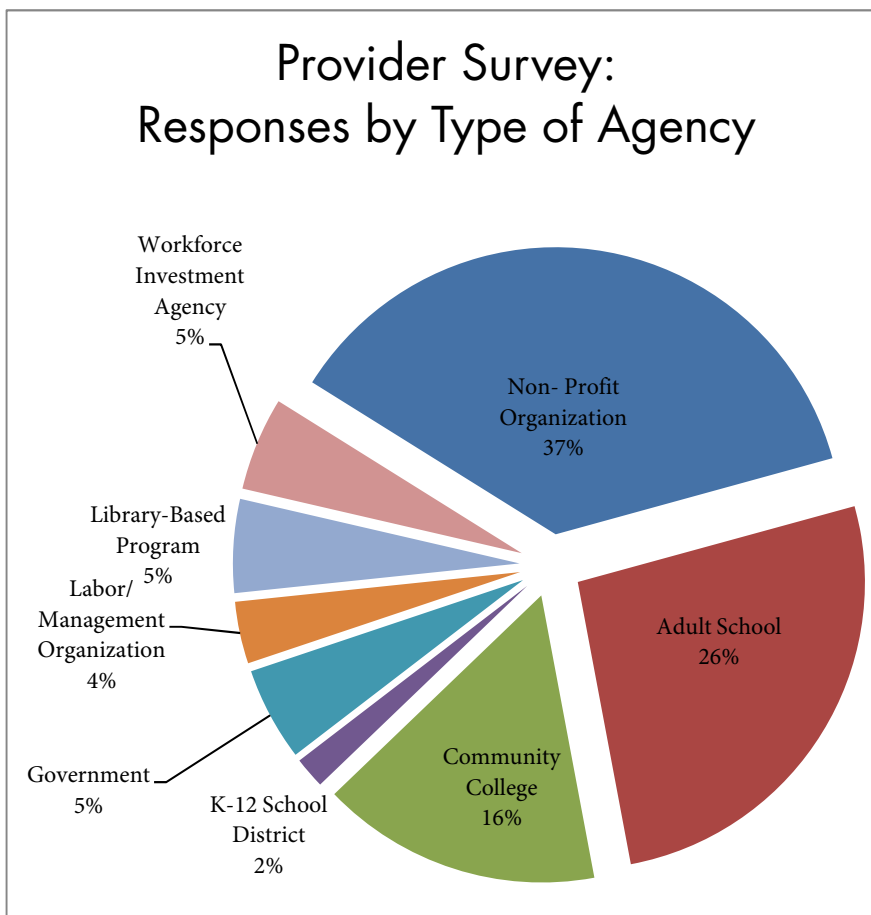
LANDSCAPE OVERVIEW: INTRODUCTION AND METHODOLOGY

The system of public and private organizations providing various types of education, training, and social services to English language learners includes hundreds of providers in Santa Clara and San Mateo Counties.

For the purpose of this project, the landscape analysis focused on those providers offering educational or career-focused services, while also assessing other types of services needed to help overcome barriers in support of English language learners’ educational or career goals.

The primary instrument used to develop the landscape was a survey sent to 80 organizations serving populations which included English language learner adults. 57 agencies responded to the survey, including 22 based in San Mateo county and 35 in Santa Clara County.

As shown in the graph below, a wide range of public and private organizations responded, with the majority of responses coming from non-profit or community-based organizations, California adult schools, or California community colleges.



The survey responses were supplemented by:

- A review of the online and printed course catalogs published by the agencies;
- In-depth interviews with 25 English language learner students enrolled in ESL classes at a cross-section of providers;
- Focus groups and individual interviews with representatives of surveyed agencies; and
- Cross-referencing the provider landscape with the demographics of the overall English language learner population.

LANDSCAPE OVERVIEW: CLASSES OFFERED

- **In San Mateo and Santa Clara Counties, over 393 ESL classes are offered by at least 45 distinct providers, including adult schools, non-profits/CBOs, community colleges, library-based programs, other local government entities, and labor-management organizations.**
- **Adult basic skills classes of various types are offered by at least 47 distinct providers.**

Among the 57 agencies surveyed, 37 offered English as a Second Language (ESL) classes, 24 offered computer or digital literacy classes, and 22 offered post-secondary or vocational programs.

Of adult education classes, 21 offered adult basic education, literacy or similar basic skills classes; 18 offered GED prep classes; 7 served as GED testing centers; and 10 offered adult high school diplomas or credit completion.

Disaggregating class offerings by county showed only minor differences between San Mateo and Santa Clara-based agencies.

Most ESL providers offer multiple classes for students at different levels or with different educational goals. In addition, the survey responses were supplemented with course catalog and website scans. The landscape

analysis identified a total of 393 ESL classes offered by 45 providers.

For adult education classes, 47 providers offered some type of adult basic skills, GED, digital literacy or similar classes, totaling 106 distinct classes. (Individual classes of the same type at the same location were counted as one). Tables listing each of the ESL and adult education classes by provider, city, and ZIP code are attached as Appendices A and B.

There are undoubtedly more classes that were not identified by the provider survey or the scan of course listings, particularly classes offered by very small community-based providers and/or targeted at specific communities, which are often advertised through posted flyers, word of mouth or other informal networks rather than being listed online or in published course catalogs.



LANDSCAPE OVERVIEW: SERVICES OFFERED

- **Silicon Valley’s educational and training providers offer a wide array of supportive services and assistance to help students succeed in their educational and career goals.**
- **Those services least likely to be available include childcare and work experience.**

Adult learners often face multiple barriers that stand in the way of achieving their educational or employment goals, ranging from lack of professional networking contacts in their career field of interest to childcare and transportation needs. To assess the availability of supportive services or assistance in overcoming barriers, the ELL education and training providers surveyed were asked about their capacity to offer such services.

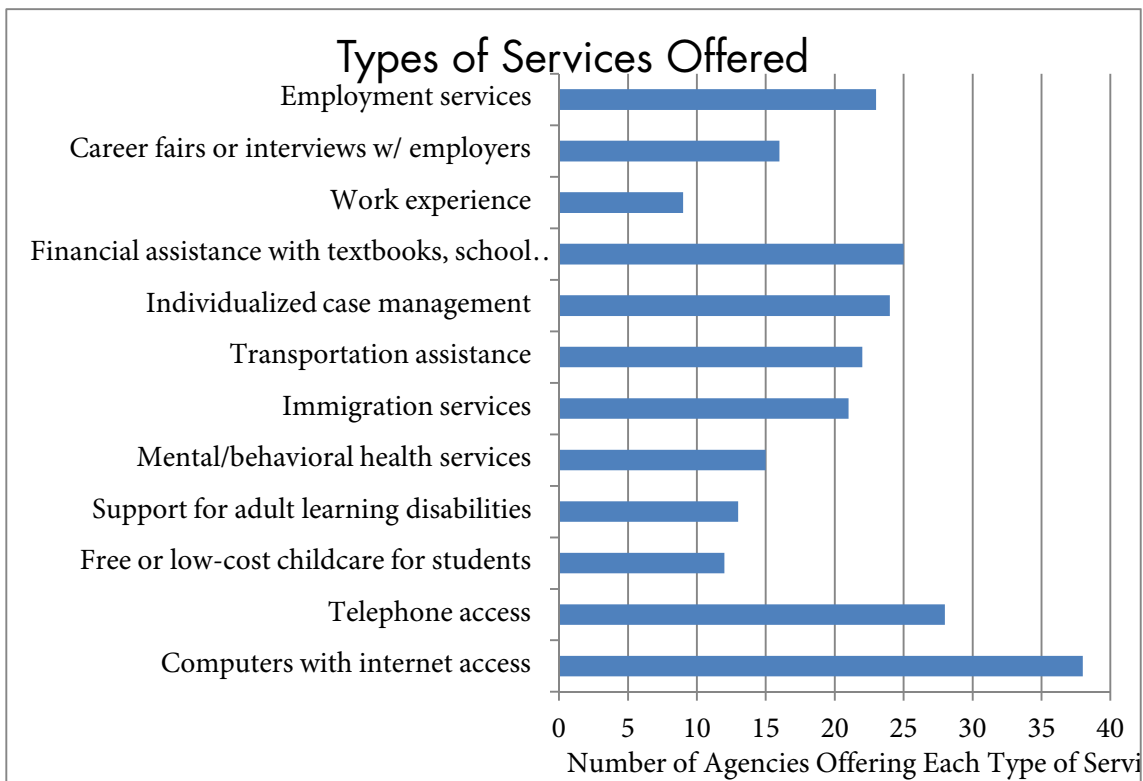
As shown in the graph below, basic services like Internet and telephone access were widely available. Many agencies also had scholarships or financial assistance available for students who could not afford the costs associated with classes.

However, only a quarter of agencies had any kind of childcare available, and most of those had narrow eligibility requirements. This was

especially true in Santa Clara County. While the two counties were similar across most of these services, only one Santa Clara County agency offered childcare; all other agencies with available childcare were in San Mateo.

Of all the services we asked about, work experience was the least likely to be offered. Many agencies offered employment services ranging from résumé writing to internet job searching, but far fewer had direct connections into employment.

Mental or behavioral health services were also not widely available, although agencies may be referring people with these needs to health care providers such as the County health systems or nonprofit mental health agencies.



LANDSCAPE OVERVIEW: IMMIGRATION SERVICES

- **Immigration status is critical for access to employment and career opportunities, as well as for some educational programs.**
- **In Silicon Valley, immigration services are offered primarily by CBOs.**

Immigration services are critical for the English language learner population, who may need assistance ranging from visa renewals to help preparing for the U.S. citizenship application to assistance with new programs such as Deferred Action for Childhood Arrivals (DACA).

An individual’s current immigration status may affect both their ability to obtain employment or to change employers as well as their eligibility for some educational opportunities. In addition to the critical role of eligibility to work in this country, the ability to earn U.S. citizenship is important for career progression. Except for the tech sector, most higher-wage growth occupations in Silicon Valley predominantly hire U.S. citizens (see *Occupations of Opportunity* section of this report.)

Immigration services were offered almost exclusively by CBOs, rather than by adult

schools or community colleges. The one exception is classes to help students prepare for the U.S. citizenship exam, which were offered by several different types of providers.

From the responses received, it appears that the services most likely to be needed by recent immigrants, such as work permits and refugee petitions, were less commonly offered than services for immigrants who have been here for some time, like help with US citizenship and DACA. While this could indicate a gap in services, it may also be simply a reflection of client demand and of what is possible under existing law.

It should also be noted that for-profit businesses offering immigration-related legal services were not part of the landscape analysis.



LANDSCAPE OVERVIEW: EMPLOYMENT SERVICES

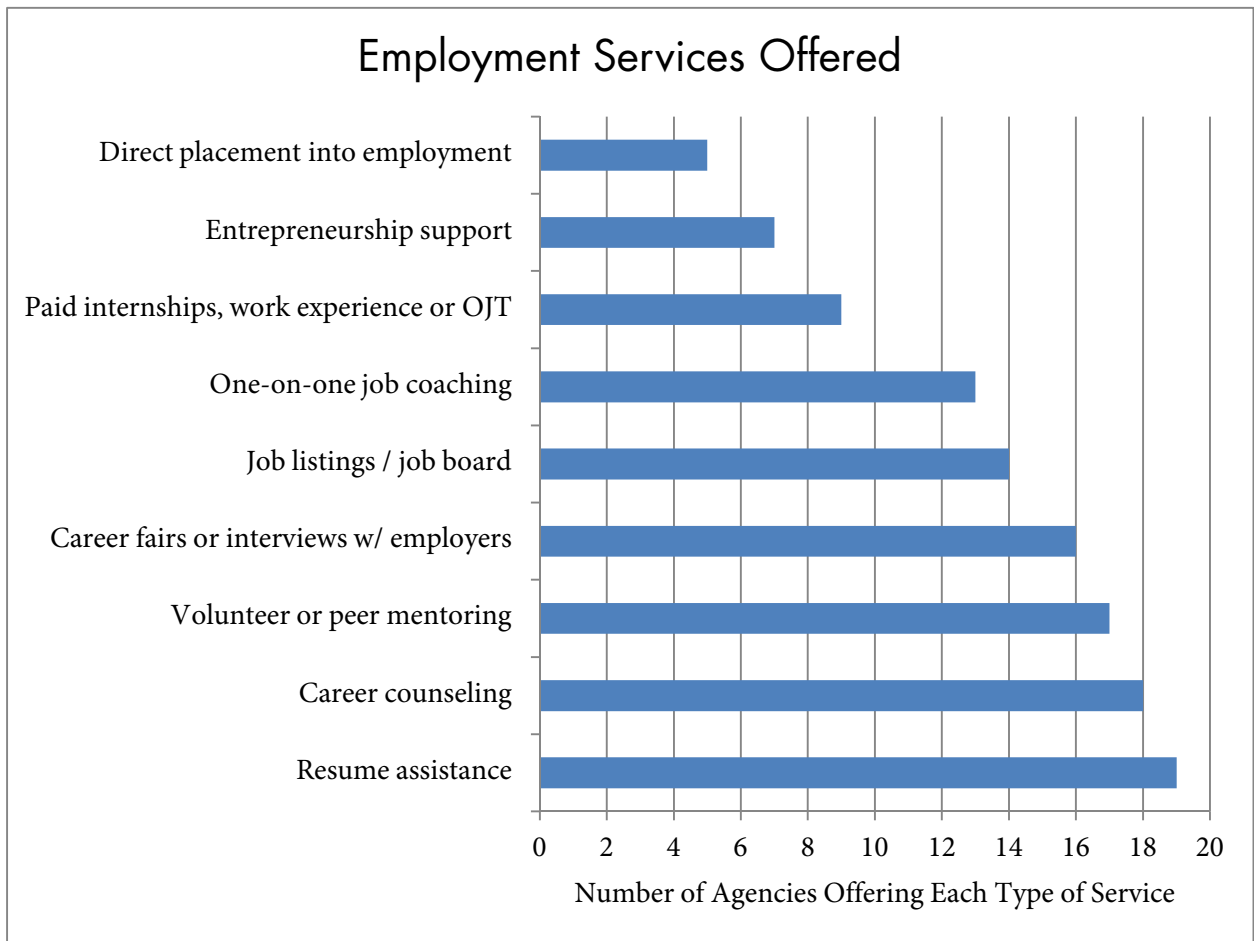
- **Labor market information and services are in high demand among English language learner adults.**
- **Many providers in Silicon Valley offer employment services, but few are able to provide on-the-job training, work experience or direct job placement.**

Employment services and assistance with career navigation were the most common needs expressed in our interviews with English learner adults. Among the ELL students interviewed, almost all were taking ESL classes with the goal of either moving up in their current job or further their long-term career goal; but most had only a vague idea of the steps needed in order to reach their career goal.

Among the respondents to the ELL provider survey, many agencies offered the basics of résumé assistance and career counseling. A large number of providers also hold career fairs, arrange interview days with employers or maintain a job board.

However, few agencies were able to provide direct job placement, on-the-job training or work experience.

It should also be noted that while this analysis focused on work experience or paid internships, internships for class credit can also be an avenue for students who do not yet have authorization to work in the U.S. to gain experience that is important for their eventual work and career goals. Since such students generally cannot work in paid internships, unpaid for-credit internships may be their only opportunity.



LANDSCAPE OVERVIEW: ROLES OF EACH AGENCY TYPE

- **Adult schools, community colleges, non-profits/CBOs, Workforce Investment Boards, County or City agencies, public libraries, and labor-management organizations each fill specific niches in the collective network of educational and career services for ELLs in Silicon Valley.**

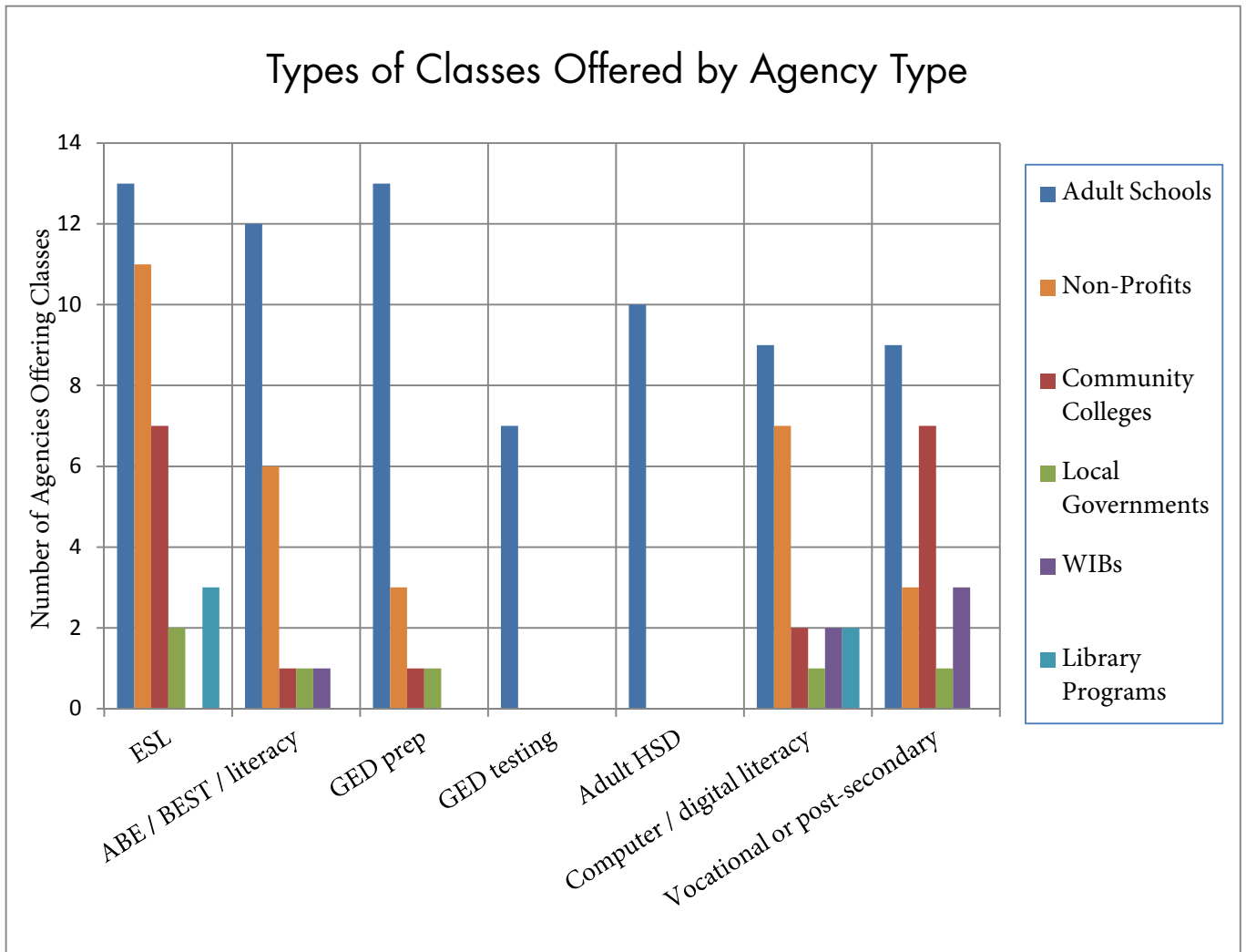
The geographic, linguistic, and sociodemographic diversity of ELLs in Silicon Valley means that there is no “one size fits all” educational model that meets the needs of the region’s ELLs.

In response to this dynamic, agencies serving these populations have each developed specific strengths and specializations to fill a particular niche. This ecosystem of organizations has evolved over time into a rich community asset that collectively is of critical importance to

English language learners’ ability to enter the economic mainstream and pursue family-supporting careers.

The chart below summarizes the classes offered by each category of agency surveyed.

The following sections explore the roles played by each type of agency, including classes, other services provided, language capacities, and populations served.



LANDSCAPE OVERVIEW: ADULT SCHOOLS

- **Adult schools are the main – and often the only – providers offering educational pathways to enable ELL adults to earn a high school degree or equivalent.**
- **Adult schools are also major resources for ESL and computer skills classes, as well as selected vocational programs.**

Adult schools are the workhorses of the adult basic skills system. They comprise the majority of agencies offering adult basic education and GED preparation classes. Furthermore, adult schools were the only agencies surveyed to offer GED testing or adult high school diploma completion.

Access to literacy, basic skills, GED preparation, and related classes is especially important for the region’s adult English language learners because a large portion of ELLs do not have a high school degree and may have had very limited access to formal education as children.

Of all ELL adults in Santa Clara and San Mateo counties, 33% do not have a high school diploma, and 20% have formal education of only

the equivalent of 8th grade or below. The largest gap in formal education is seen among Spanish-speaking ELLs, of whom 54% have no high school diploma, and 34% have an 8th grade education or below.

The classes offered by the adult school system are therefore critical for ELL adults to enable them to acquire the necessary skills to advance to higher education or to a career.

In addition to basic skills, adult schools offer an array of classes including ESL, computer skills, and selected vocational courses (usually in one or two targeted industry or occupational sectors).

Adult Schools in Santa Clara and San Mateo Counties		
<i>Adult School</i>	<i>City (primary location)</i>	<i>County</i>
South San Francisco Adult School	South San Francisco	San Mateo
Jefferson Adult School	Daly City	San Mateo
Sequoia Adult School	Menlo Park	San Mateo
San Mateo Adult School	San Mateo	San Mateo
Cabrillo Unified School District	Aptos	San Mateo
Morgan Hill Community Adult School	Morgan Hill	Santa Clara
Silicon Valley Adult Education	San Jose	Santa Clara
Sunnyvale-Cupertino Adult School	Sunnyvale, Cupertino	Santa Clara
Milpitas Adult Education and Corrections	Milpitas	Santa Clara
Mountain View-Los Altos Adult Education	Mountain View, Los Altos	Santa Clara
Palo Alto Adult School	Palo Alto	Santa Clara
Campbell Adult and Community Education	San Jose, Campbell	Santa Clara
East Side Union High School District	San Jose	Santa Clara
Santa Clara Adult Education	Santa Clara	Santa Clara

LANDSCAPE OVERVIEW: NON-PROFITS / COMMUNITY-BASED ORGANIZATIONS

- **Non-profit organizations are the primary providers of immigration legal services, and play an important role in providing supportive services.**
- **Non-profits are also the main source of linguistic and cultural capacity to reach smaller language communities within Silicon Valley.**

Non-profit organizations come in all shapes and sizes. They range from entirely volunteer-run organizations to multi-million-dollar agencies with hundreds of employees. Their missions vary as well; within the scope of ELL services, some offer classes or training, some provide immigration assistance or social services, some focus on supporting a particular population, and some are generalists that combine multiple roles.

Non-profits may also refer to themselves as community-based organizations (CBO), service providers, or by more tailored descriptions such as non-profit vocational schools, social service providers, or labor-management organizations.

In the aggregate, non-profits play several critical roles in the ELL provider landscape. They are an important resource for supportive services. They are also the only group of providers with significant capacity to provide immigration legal services.

In addition, nonprofits/CBOs provide critical language capacity, especially in languages that are not among the top two or three most

commonly spoken. For smaller subgroups of immigrants with clusters in the San Mateo-Santa Clara area, they are often the only providers with linguistic and cultural competency. This enables them to provide services, particularly introductory ESL classes or native language literacy, to populations of English learners who may be less likely to access classes at public institutions. Non-profits were also the most likely to report that a majority of the ELL clients they served had less than a high school education.

The complete picture is likely even more tilted towards non-profit organizations, because there are many micro-CBOs serving specific sub-populations which we were not able to include in the provider survey.

In addition to placing an emphasis on linguistic and cultural competency of staff, non-profits were most likely to mention using a language line (telephone interpretation service) to communicate with clients whose language was not spoken in-house.

Community-Based Organizations Serving English Language Learners in Santa Clara and San Mateo Counties <i>(includes those organizations which responded to the SV ALLIES survey)</i>		
<i>Community-Based Organization</i>	<i>City (primary locations)</i>	<i>County</i>
International Institute of the Bay Area	Redwood City	San Mateo
Renaissance Entrepreneurship Center	East Palo Alto, Daly City, Foster City, Menlo Park, Redwood City, San Mateo	San Mateo
Family Connections	East Palo Alto, Menlo Park, Redwood City	San Mateo
Nuestra Casa	East Palo Alto	San Mateo
Rosalie Rendu Center	East Palo Alto	San Mateo

Samaritan House	San Mateo, Redwood City	San Mateo
Puente de la Costa Sur	Pescadero	San Mateo
AFL-CIO Community Services	Foster City	San Mateo
JobTrain	Menlo Park	San Mateo
Educators for Fair Consideration	San Francisco	San Mateo, Santa Clara
Jewish Family Services of Silicon Valley	Los Gatos	Santa Clara
Building Skills Partnerships	San Jose	San Mateo, Santa Clara
Bill Wilson Center	San Jose, Santa Clara	Santa Clara
Korean American Community Services	San Jose	Santa Clara
Vietnamese Voluntary Foundation, Inc.	San Jose	Santa Clara
Asian Law Alliance	San Jose	Santa Clara
Sacred Heart Community Service	San Jose	Santa Clara
Catholic Charities of Santa Clara County	San Jose	Santa Clara
Services, Immigrant Rights and Education Network (SIREN)	San Jose	Santa Clara
Asian Americans for Community Involvement (AACI)	San Jose	Santa Clara
The Salvation Army	San Jose	Santa Clara
Somos Mayfair	San Jose	Santa Clara
ICAN	Milpitas	Santa Clara
Vision Literacy	Milpitas, Gilroy	Santa Clara

LANDSCAPE OVERVIEW: COMMUNITY COLLEGES

- **Community colleges are the region’s primary providers of vocational and postsecondary education for second language speakers; however, low English ability is a barrier to enrolling in college-level courses.**
- **Non-credit ESL classes offered by some community colleges are a critical bridge between beginning/intermediate ESL and the higher level needed for college courses.**

California’s public community colleges serve a wide range of students. In Silicon Valley, a significant portion of their student population are students for whom English is a second language.

Community colleges are the regions’ primary providers of vocational, career-technical, and post-secondary education. (Four-year universities and graduate schools were not included in the landscape analysis.) Many adult schools and CBOs offered one, two, or a handful of vocational programs, but the breadth and depth was primarily provided by the community colleges.

For-credit courses and programs of study at community colleges generally require students to speak, read, and write English. In order to enroll and take classes towards a degree or certificate, English learner students must first attain a minimum qualifying score on an English

assessment test.

Several community colleges also provide non-credit course offerings – including intermediate and advanced ESL classes – which are accessible to ELL students with intermediate levels of English ability. These classes provide a critical bridge between the beginning or low-intermediate ESL classes available at adult schools and CBOs, and the more stringent requirements of college degree programs or of many career-ladder jobs.

In order to facilitate pathways for higher education and career opportunities, some adult schools and community colleges have created referral and/or articulation partnerships to help students transition from the adult school into the community college. The final “exit memo” portion of the CARS project will profile these partnerships and the factors involved in their success.

Community Colleges in Santa Clara and San Mateo Counties		
<i>Community College</i>	<i>City (main campus)</i>	<i>County</i>
Skyline College	San Bruno	San Mateo
College of San Mateo	San Mateo	San Mateo
Cañada College	Redwood City	San Mateo
Mission College	Santa Clara	Santa Clara
West Valley College	Saratoga	Santa Clara
Gavilan College	Gilroy	Santa Clara
San Jose City College	San Jose	Santa Clara
Evergreen Valley College	San Jose	Santa Clara
San Jose/Evergreen Workforce Institute	San Jose	Santa Clara
Foothill College	Los Altos Hills	Santa Clara
De Anza College	Cupertino	Santa Clara

LANDSCAPE OVERVIEW: WORKFORCE INVESTMENT BOARDS

- **Workforce Investment Boards are major providers of employment and career training and services, but there are barriers to cross-referral of ELLs between WIBs and other education providers.**

Workforce Investment Boards (WIBs), together with their associated entities and contractors, are major providers of employment and career services for Silicon Valley’s unemployed and underemployed workers. Their One-Stop Career Centers offer job coaching, job search assistance, assessment, and workshops on a range of skills, as well as providing training vouchers for qualified residents looking for short-to-medium-term occupational training. They also host job fairs and employer interviews, as well as providing related supportive services for eligible clients.

Workforce Investment Boards’ services are primarily provided in English, with limited capacity to assist speakers of other languages, although they do serve a number of ELLs. Many federally funded workforce programs also require the client to provide documentation to work in the United States, which is a barrier for some ELLs.

These two structural issues which limit access to

the WIBs for ELLs may contribute to the perception among educational providers and ELL students themselves that there is a paucity of employment and career information and services available for ELL adults.

Provider survey data reinforces the notion that other ELL providers are either not well connected to the WIBs, or feel that the WIBs’ requirements are not a good match for their ELL clients. The ELL providers surveyed were asked to name up to 3 other service providers to whom they most often refer clients. Among the 99 organizations named, there were only two references to referring clients to a WIB or a WIB-affiliated entity.

Similarly, WIB representatives indicated in focus groups and interviews that they would benefit from increased information and connections that would aid them in referring non-English-speaking clients to ESL classes or other appropriate services.

Workforce Investment Boards in Santa Clara and San Mateo Counties		
Workforce Investment Board / Agency	Primary service area (cities)	County
San Mateo WIB / PeninsulaWorks	All cities in San Mateo County	San Mateo
NOVA WIB	Cupertino, Los Altos, Milpitas, Mountain View, Palo Alto, Santa Clara & Sunnyvale	Santa Clara
Work2future	San Jose, Campbell, Morgan Hill, Los Altos Hills, Gilroy, Los Gatos, Saratoga & Monte Sereno	Santa Clara

LANDSCAPE OVERVIEW: OTHER LOCAL GOVERNMENT ENTITIES

- **County governments are the main safety net service providers and may also play a role in convening and/or funding community-based organizations that serve ELLs.**
- **Many public libraries and community centers provide ESL, literacy, English conversation clubs or other programs, often supported by the affiliated city government.**

Other local government entities are also key components of the network of ELL services.

County governments, as the primary governmental entity responsible for human services and the health care safety net, provide direct services, advocacy, and grants to other providers, and may also play a coordinating or convening role. In Santa Clara, the County government is a central figure in immigration policy and regional coordination discussions as well as funding for service provision.

Public libraries also provide a wide range of

programs, ranging from their core function as landing libraries to literacy and ESL classes, drop-in conversation groups for English learners, access to computers and online learning, and more. Finally, some city governments also offer services targeting ELLs, especially through neighborhood community centers.

The list below represents only a sample of the region’s library-based, community-center based, and other programs and classes affiliated with local government entities.

<i>Selected Local Government Entities Serving English Language Learners in Santa Clara and San Mateo Counties</i>			
<i>Public Entity or Program</i>	<i>City/Cities Served</i>	<i>County</i>	<i>Type of Entity or Program</i>
Project Read - Menlo Park	Menlo Park	San Mateo	Library-Based Program
Community Learning Center	South San Francisco	San Mateo	Library-Based Program
City of Redwood City/Fair Oaks Community Center	Redwood City	San Mateo	Community Service/Safety Net Provider
County of San Mateo Human Services Agency	Countywide	San Mateo	County Government
Santa Clara County Library District	Campbell, Cupertino, Gilroy, Los Altos, Milpitas, Morgan Hill, Saratoga	Santa Clara	Library-Based Program
County of Santa Clara - Immigrant Relations & Integration Services	Countywide	Santa Clara	County Government
County of Santa Clara County - Office of Reentry Services	Countywide	Santa Clara	County Government

LANDSCAPE OVERVIEW: LANGUAGE CAPACITY

- **The collective language capacity of ELL providers is a major asset to Silicon Valley.**
- **In total, ELL providers have capacity in over 50 languages, with at least two providers able to serve each of the top ten languages spoken.**

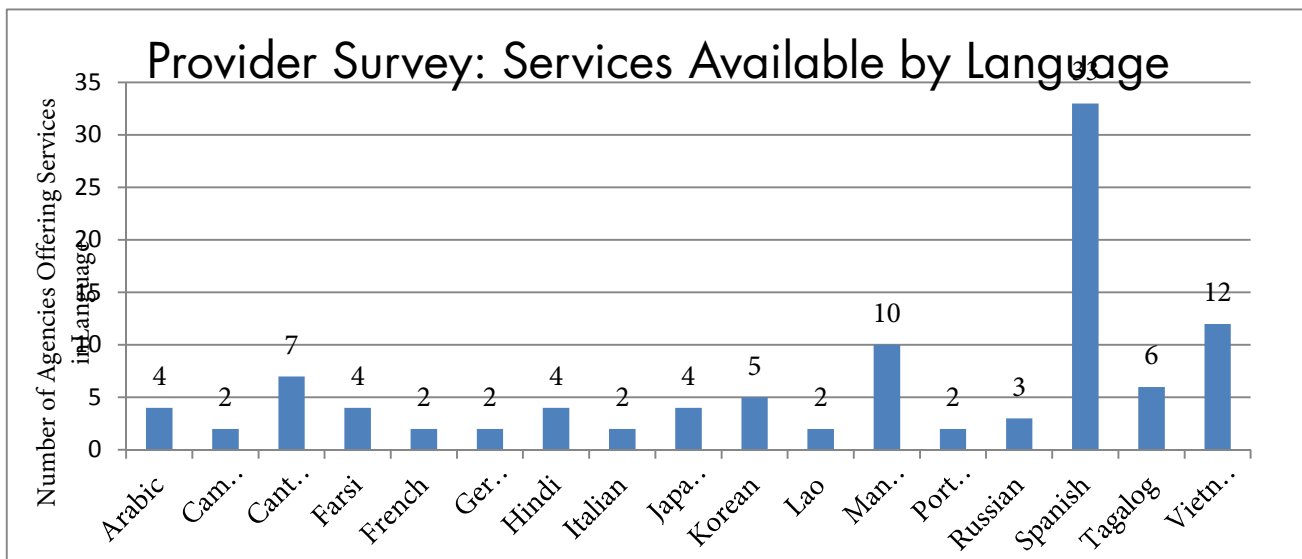
As discussed in the Demographics section, at least 70 different languages (and likely considerably more) are spoken by adult ELLs in Silicon Valley. The top ten home languages spoken are: Spanish, Vietnamese, Chinese, Tagalog, Mandarin, Cantonese, Korean, Japanese, Russian, and Hindi. Speakers of these ten languages collectively comprise 88% of all adult ELLs.

Engaging with speakers of so many different languages presents a considerable challenge to ELL educational and service providers. To meet this challenge, the network of providers has invested considerable attention and resources to developing the capacity to serve multiple language communities. Across all agencies surveyed, the network has the collective capacity to provide services in at least 50 languages.

For every one of the top ten languages spoken in the region, at least two of the agencies surveyed are able to offer services in that language. The graph below displays the number of agencies

who indicated they were able to offer services in each of the top ten languages. (This means that the agency has at least one staff member who is able to speak with clients in the language; it does not necessarily indicate that every class and service is available in that language.)

Other languages shown for which at least two agencies indicated capacity are: Arabic, Cambodian, Farsi, French, German, Italian, Lao, and Portuguese. Finally, languages for which capacity was available at a single agency include: Amharic, Triginya, Somali, Azerbaijani, Bosnian, Burmese, Cebuano, Chinese-Hakka, Croatian, Dari, Iraqi Dialect, Khmer, Lahu, Malaysian/Indonesian, Marathi, Mien, Pampango, Punjabi, Rhade, Serbian/Croatian, Shanghainese, Sichuanese, Slovak, Taishanese, Taiwanese, Thai, Urdu, Uzbek, and Waray-waray. Several agencies also indicated using a language line (phone translation service) if they did not have capacity in-house.



LANDSCAPE OVERVIEW: LANGUAGE CAPACITY BY COUNTY

- **Providers in both counties have capacity in Spanish.**
- **The majority of agencies able to serve languages other than Spanish are in Santa Clara County, with resources in San Mateo County considerably more limited.**

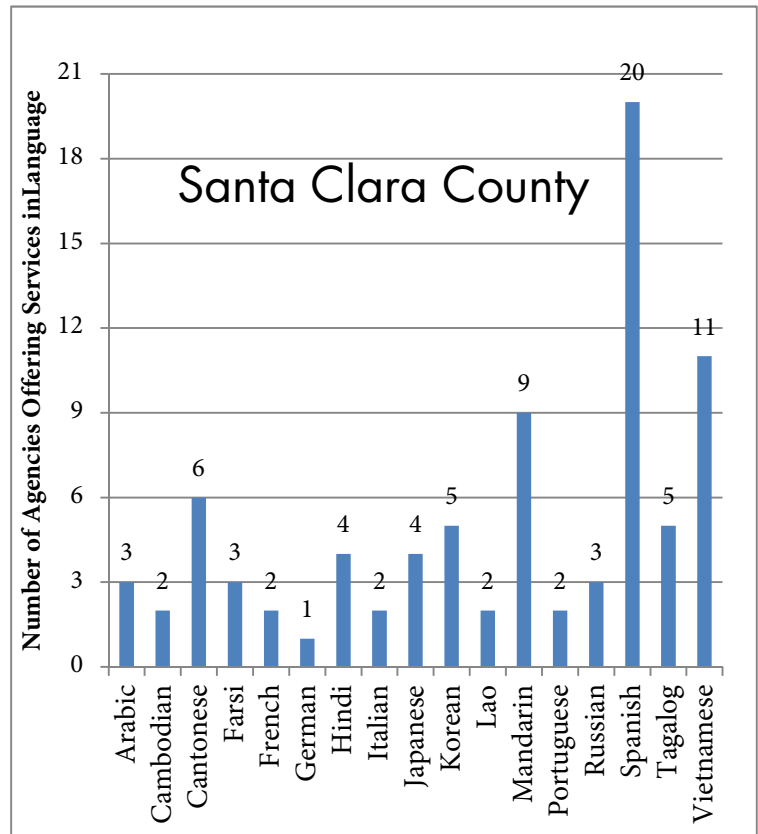
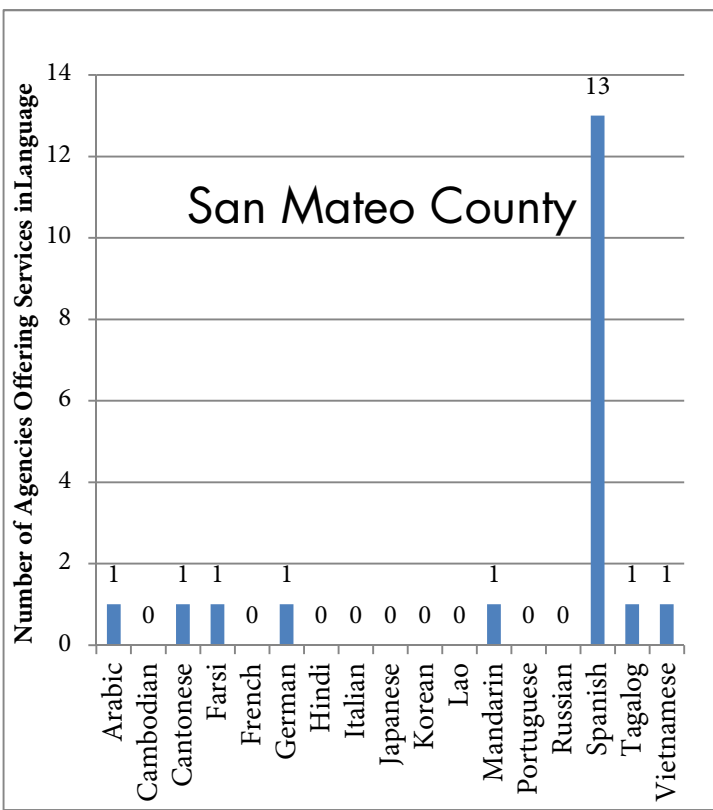
The provider survey showed considerable disparity in language capacity between the two counties, with San Mateo considerably more limited. The two graphs below compare the number of agencies in each county able to serve clients in the specified languages.

Most San Mateo-based agencies surveyed said they could provide services only in English and Spanish. Even for Mandarin Chinese, Tagalog, and Cantonese, which are the top languages spoken in that county after Spanish, only one agency apiece claimed capacity.

It should be noted that a zero on this graph does not indicate that there is no capacity at all in San Mateo County for that language; there are undoubtedly other smaller agencies who were not surveyed or did not respond. However, these data do point to a possible gap in access for ELLs in San Mateo County who speak a language other than Spanish.

Part of this difference may be due to the greater linguistic dispersion of Santa Clara’s ELL residents relative to San Mateo’s. In San Mateo County, 52% of all ELL adults speak Spanish, compared to just 40% in Santa Clara.

In addition, obtaining resources to develop capacity in a particular language often necessitates identifying a “critical mass” of speakers of that language concentrated in the area. The smaller total number of ELLs in San Mateo County may make it more difficult to develop language capacities. For example, even though Tagalog is the third most common language spoken by ELLs in San Mateo, there are fewer than 7,000 adult ELL Tagalog-speakers in the county. In Santa Clara County, where the third most common language among ELLs is Chinese, there are over 26,000 adult ELL speakers of that language.



LANDSCAPE OVERVIEW: LANGUAGE CAPACITY BY AGENCY TYPE

- **Among ELL providers, all agency types have considerable capacity in Spanish and some capacity in other languages.**
- **However, for less commonly spoken languages, nonprofit community organizations are the main resource for in-language services.**
- **Nonprofits are also the most likely to have broad capacity for many different languages within a single agency.**

As seen above, each type of agency is to some extent specialized at offering specific types of classes and services; for example, nonprofits are the most likely to offer first-language literacy, adult schools are most likely to offer adult basic skills and GED prep, and community colleges offer the greatest depth and breadth of post-secondary vocation programs. This differentiation of classes and services means that the language capacity available at each type of agency is important for two reasons.

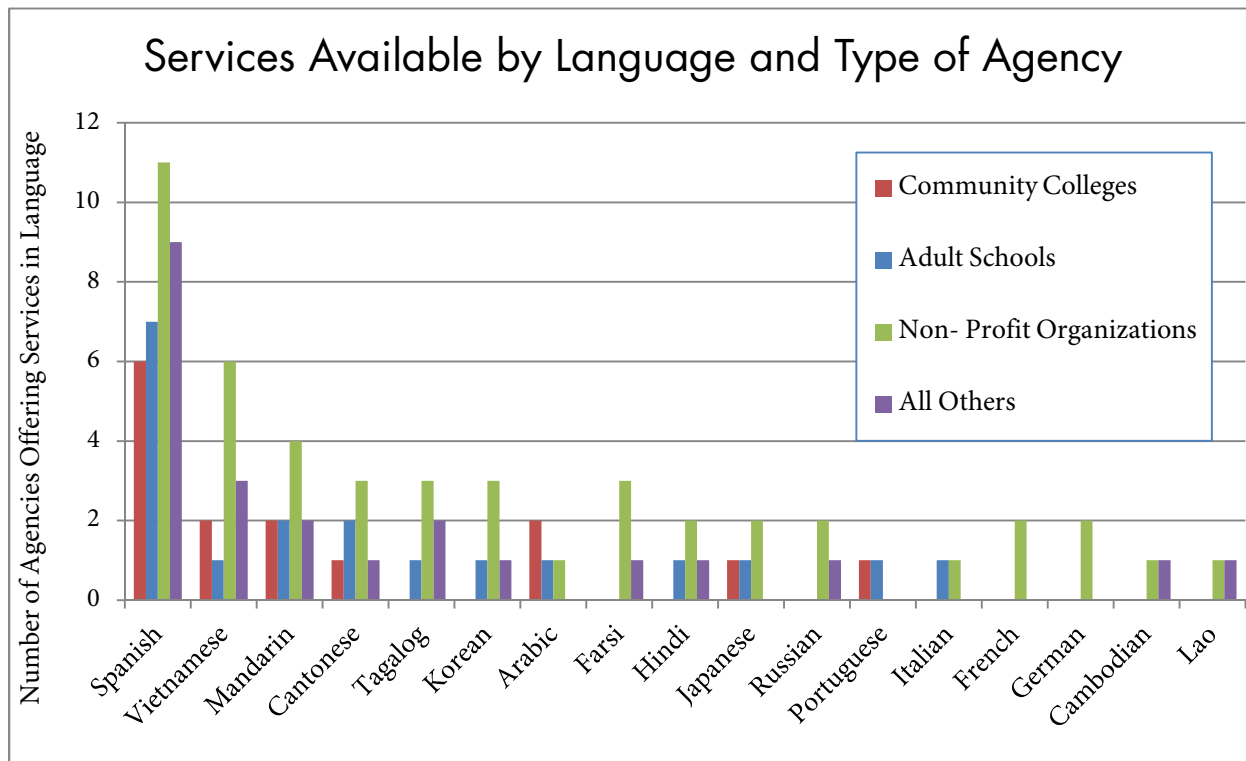
First, language capacity at the agencies to which ELLs are likely to reach out when they are seeking assistance or advice helps to connect these linguistically isolated community members to career and educational resources. Second, capacity at each of the different types of agencies comprising an educational or career pathway enables members of all communities to move along pathways.

While many ELLs who have developed some

English ability can and do take classes taught in English and access resources that are available in English, the presence of someone able to communicate in their home language can be important to impart confidence and trust.

The graph below highlights the key role played by non-profit community-based organizations in building up the breadth of the region's language capacity. Almost all of the community colleges and adult schools had some capacity in Spanish. However, beyond Spanish, capacity at organizations other than non-profits was considerably more narrow. A number of the less common languages are primarily or only spoken at non-profits.

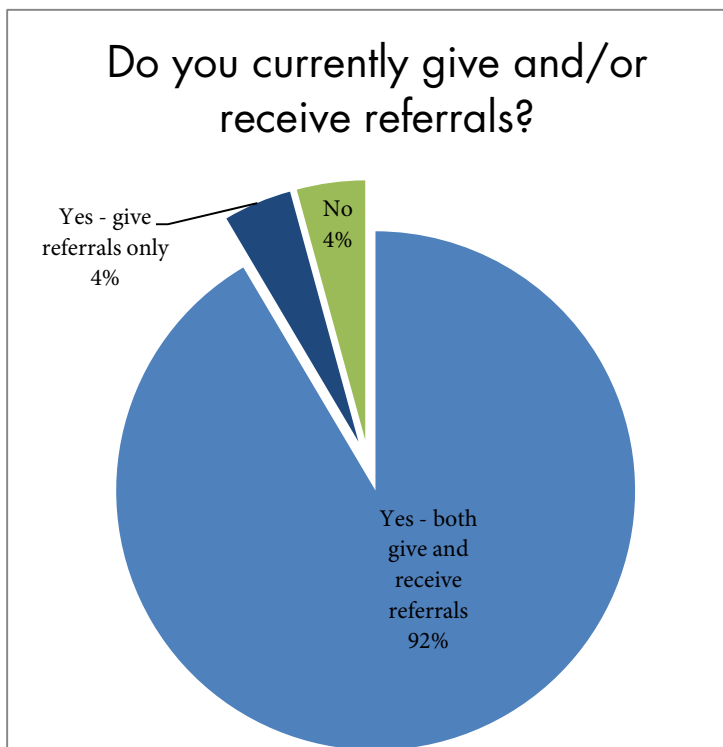
Equally importantly, several nonprofits had broad language capacity in a dozen or more languages, enabling them to more effectively implement a "no wrong door" approach for residents from communities across the county.



LANDSCAPE OVERVIEW: REFERRALS

- **Nearly all (92%) of ELL-serving agencies surveyed both give and receive referrals.**
- **The volume of referrals ranged widely, from agencies with fewer than 10 referrals per year to those giving and receiving thousands of referrals each year.**
- **The large majority (78%) of agencies indicated that they would benefit from expanding their referral capacity.**
- **Barriers to expanding cross-referrals included lack of resources, insufficient familiarity and connections between agencies, and complex eligibility/enrollment requirements.**

As discussed in the previous sections, the diversity and dispersion of Silicon Valley’s ELL populations means that no single agency can reasonably expect to be able to serve all types of ELLs that walk through its doors. Rather, each provider has specialized to fill particular niches, be they geographic, linguistic, or aimed at a particular educational or service need. The ability to refer clients from one agency to another is therefore critical to the effective functioning of the ELL provider network.



However, there was a strong sentiment that additional capacity for cross-referrals is needed. 79% of agencies said that the ability to provide and/or accept more referrals would be an asset to their agency. Among those who said additional referral capacity would not be useful, the primary reason given were space and staffing constraints; no agency said that additional referral ability was unnecessary because they already had adequate capacity to meet the demand for cross-referrals.

Given that most agencies already provide some

referral and see a need to expand that ability, what factors are preventing providers from increasing referrals?

The most commonly cited barriers to giving and/or receiving referrals included:

- **Limited resources, staffing or space.**

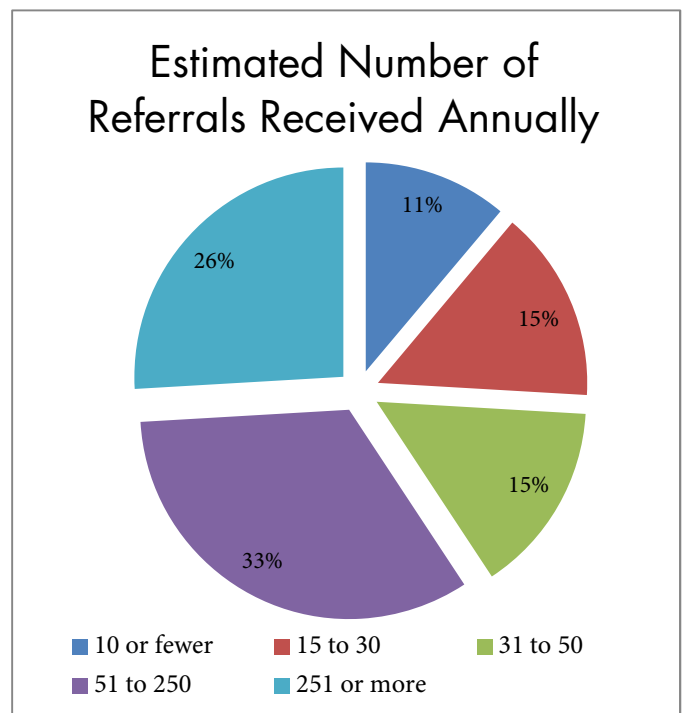
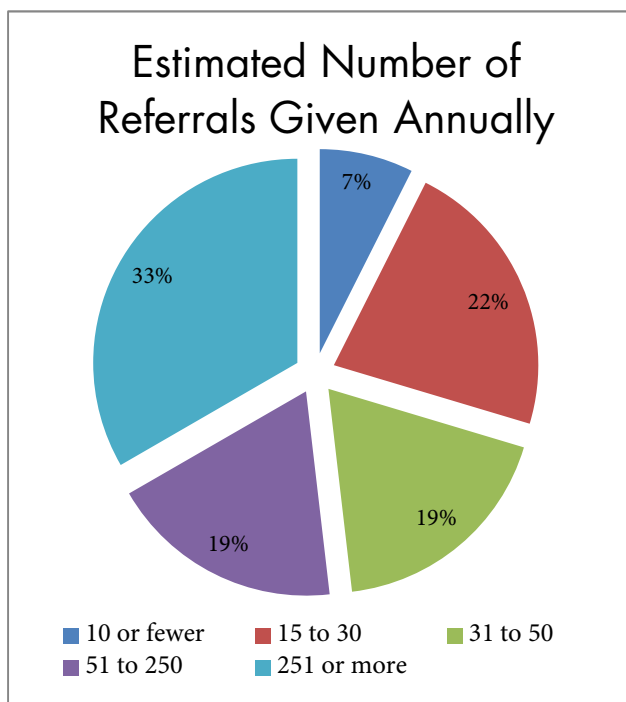
Providers across the two counties have invested extensively in building up their capacity and relationships to be able to give and receive referrals. Of those agencies who responded to the provider survey, nearly all said that they participate in referring clients to and from other agencies.

- **Insufficient familiarity and connections between agencies.**
 - Need for more complete, accurate, and up-to-date information on available classes and services.
 - Lack of articulation and/or aligned assessments.
 - Lack of direct personal contacts or formal referral relationships with other agencies.
 - Lack of direct access to 2-1-1 database.
- **Restrictive eligibility requirements and/or lengthy and complex application processes.**

Finally, the two graphs below summarize the approximate volume of referrals as reported by each agency. Agencies fell at all points along the

spectrum, from those who give and receive only a handful of referrals per year, to those who process hundreds or thousands of annual referrals.

Needs and challenges associated with cross-agency referrals are likely to vary considerably based on volume. A small agency that makes only a handful of referrals per month may find a lack of complete and up-to-date information to be the greatest barriers, while an agency referring dozens of people per day may be more in need of resources to speed up and automate routine referrals and to track referral results.



LANDSCAPE OVERVIEW: NEEDS AND GAPS

- **75% of agencies report that they are unable to serve all ELLs who come to their doors.**
- **The most common reason for being unable to serve an individual is that he or she is seeking classes or services not offered by that agency.**

Although there is a broad and deep network of educational opportunities and related services available to English language learner adults, it is clear that existing resources are not enough to meet the aggregate need, especially as the labor market continues to become ever more competitive and more demanding both of educational credentials and of networking, customer service or other relationship-based skills that depend heavily on facility and confidence in spoken and written English.

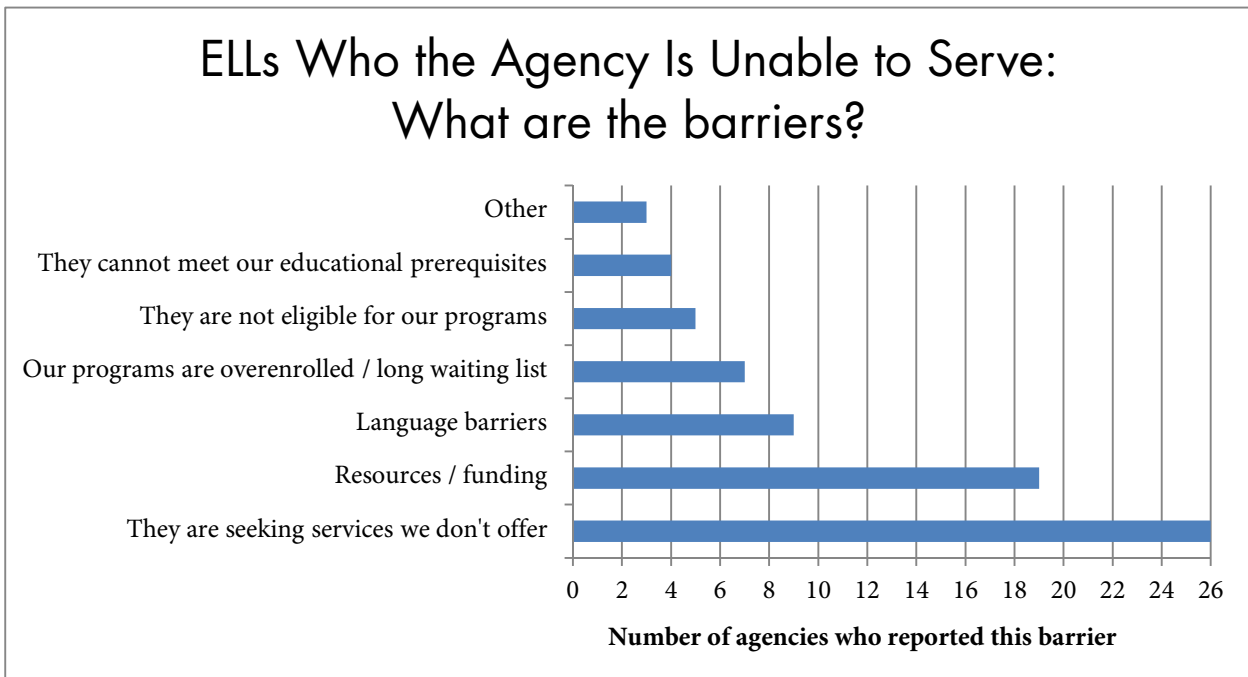
Among the provider survey respondents, 75% indicated that they occasionally or frequently have to turn away ELLs seeking services. The graph below shows the most common barriers resulting in the inability to serve someone.

By far the most frequently cited reason for being unable to serve a client was that he or she was seeking services not offered by that agency. This

points strongly to a potential role for expanding cross-referrals in order to better connect ELLs with available classes and services.

Resources/funding was the next most common barrier mentioned, which along with overenrollment/long waiting lists again indicates high demand relative to the limited resources available.

When ELLs themselves were interviewed, they described a complementary set of barriers to reaching classes at the agencies where they are offered. Childcare, transportation/proximity, and limited class schedules were the challenges that tended to circumscribe their ability to enroll in the classes they sought. Interviewees anticipated encountering higher barriers in all three of these categories as they pursued college-level education, with an added concern over the cost of fees and tuition.



LANDSCAPE OVERVIEW: NEEDS AND GAPS (CONTINUED)

- **The most common unmet needs for adult ELLs are those impacted by larger policies and systems: housing assistance, affordable childcare, and immigration services.**
- **Access to employment services and labor market information was identified as a major gap in the pathway between ESL or adult education classes and career opportunities.**

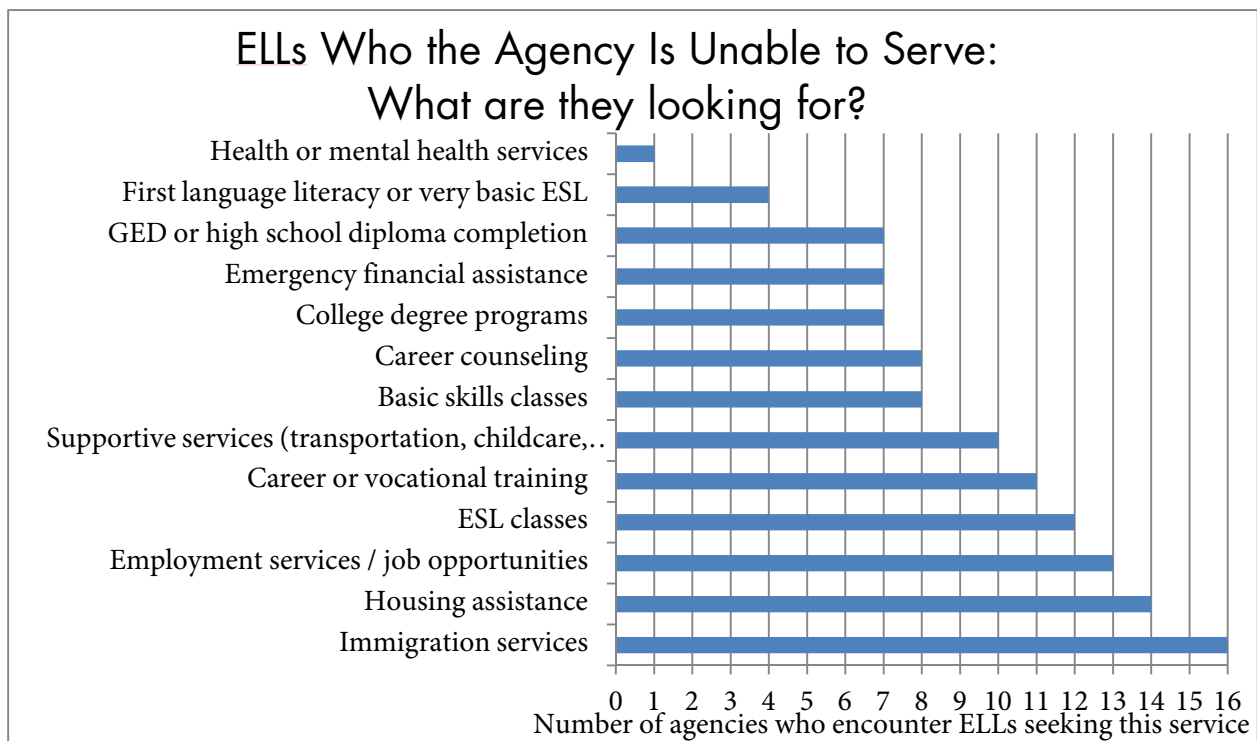
The most commonly mentioned gaps in services touched on needs which local ELL educational and service providers may have only a limited ability to impact, including immigration status, housing assistance and affordable childcare.

Providers identified a considerable unmet need for immigration and citizenship services, which is reinforced by the demographic and economic data. While immigration services are not typically within the scope of college or adult school, a number of non-profit organizations in each county do provide immigration-related advice, assistance, and legal support. Expanded information and capacity for cross-agency referrals might thus help to fill this need.

It is important to note, however, that the barrier

is not always the availability of assistance. In many cases, there is simply no legal remedy available for a particular immigration issues: a challenge not solvable at the local level. The President’s recent Executive Order, if upheld by the courts, may create an avenue to adjust immigration status for people who previously had none; in that event, the region is likely to see a considerable increase in demand for immigration services.

Other systemwide gaps identified include lack of sufficient affordable housing and of affordable, accessible childcare, both of which are key determinants of job and career access. For these two needs, increased referral capacity alone is likely to be of limited effectiveness; there simply is not enough supply available to meet the need.



As the cost of living continues to grow and availability of both affordable housing and affordable childcare declines, major shifts in public policy may be necessary to address these gaps.

The good news is that many of the other needs identified *can* be impacted by local educational and service providers. ESL classes, adult basic skills, GED preparation, and career/vocational training were all identified by providers as common unmet needs.

First language literacy or very basic ESL was mentioned specifically by several agencies as a need for which services were unavailable or for which they could not provide referrals. This may warrant further investigation as a possible area which is in need of increased capacity.

Finally, both agencies themselves and ESL students identified connection to labor market information and career opportunities as a key gap. As discussed above, few agencies were able to provide direct job placement, on-the-job training, or work experience. Furthermore, even though agencies experienced high client demand for employment services and information, very few agencies reported referring clients to the Workforce Investment Boards which are the primary agencies providing employment services. This is likely due to concerns about eligibility and perhaps language access.

The final section of this report examines employment patterns of ELLs and potential career opportunities accessible to them.

WORKFORCE AND CAREER OPPORTUNITIES

English language learner adults are an integral part of the Silicon Valley workforce. They comprise 21% of all working adults in San Mateo and Santa Clara counties, and a higher portion in certain industries; ELLs are 35% of all construction workers, 37% of all staff at skilled nursing facilities, 60% of all landscapers, and 63% of all workers in building services. If we broaden the view to look at all workers who speak English as a second language (including those who are English-fluent), their impact is larger still; in fact, a majority (53%) of all workers in Silicon Valley are second language speakers.

However, many ELLs are currently employed in very low-wage occupations that do not offer significant opportunities for advancement. As a result, ELLs as compared to the overall Silicon Valley workforce are less likely to earn a living wage, less likely to have health insurance, and their households and families are more likely to be in poverty or low-income.

The following sections provide an overview of the employment characteristics of English language learner adults in San Mateo and Santa Clara Counties, as well as occupational and wage projections indicating sectors with potential career pathway opportunities for ELLs over the next five years.

A key finding of this analysis is that there are “occupations of opportunity” which are projected to have substantial job openings over the next 10 years and pay livable wages or have potential to do so. A number of these occupations do not require a college degree, and several are accessible to English learners. However, the large majority require at least a high school diploma, and many necessitate a level of English fluency. These results highlight the increasing importance to ELLs’ financial well-being of access to adult basic skills classes, GED preparation, and a continuum of ESL classes.

WORKFORCE AND CAREER OPPORTUNITIES: KEY FINDINGS

Labor Force Participation

- Three-quarters of English language learner adults in Silicon Valley are working or looking for work.
- The gender gap in employment is higher among English language learners than in the general population.

Earnings

- Over half (52%) of working English language learners earn less than \$30,000 per year.
- Spanish-speakers are the most likely to earn low wages, followed by Vietnamese- and Tagalog-speakers.

Current Employment Patterns

- The top five occupations in which ELLs work are cook, construction laborer, janitor, maid/housekeeper, and personal care aide; four of the five pay less than \$15 per hour.
- Higher-wage occupations with notable concentrations of ELLs include software developers, accountants/auditors, engineering techs, registered nurses, and some supervisory or managerial positions.

Occupations of Opportunity

- Significant numbers of job openings are projected in a number of occupations in Silicon Valley including occupations accessible without a college degree which typically pay \$15 to \$30 per hour.
- The large majority of occupations of opportunity require at least a high school diploma.
- For higher-wage occupations (those requiring a college degree), acquiring both English fluency and US citizenship is important for accessing career pathways.

EMPLOYMENT

- **Three-quarters of English language learner adults in Silicon Valley are working or looking for work.**
- **The gender gap in employment is higher among English language learners than in the general population.**

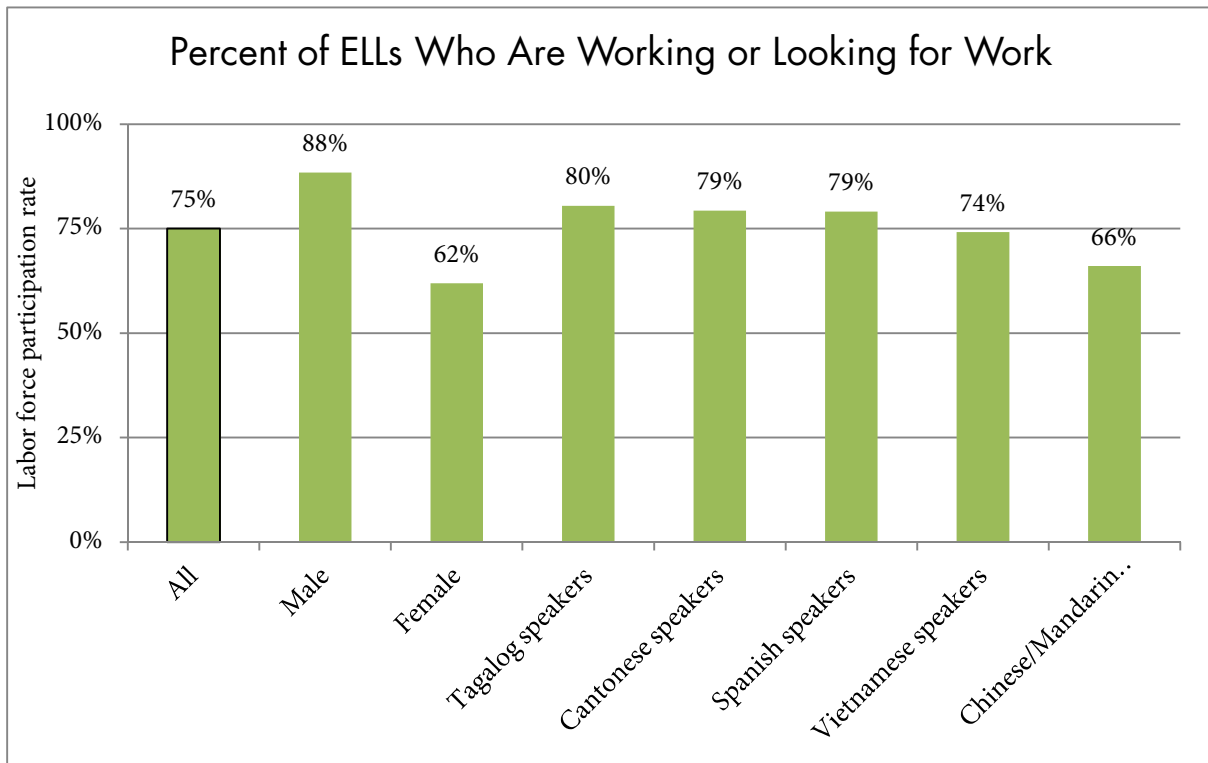
Among Silicon Valley’s English language learners (ages 18 to 64), 75% are labor force participants, meaning they are either employed, or unemployed and actively looking for work.

This is slightly lower than the 80% labor force participation for the general population in the same age bracket, due to the fact that women who are English language learners are less likely than women overall to be in the labor force, with labor force participation rates of 65% and 73% respectively. On the other hand, men who are English language learners are slightly *more* likely

than men overall to be in the labor force (88% versus 86%).

The graph below shows labor force participation rates of English language learners by gender and primary language spoken.

Among employed English language learners, the large majority (78%) work for a private for-profit employer; 5% work in the nonprofit sector and 6% in the public sector. The remaining 11% are self-employed or work without pay for a family business.



EARNINGS FROM WORK

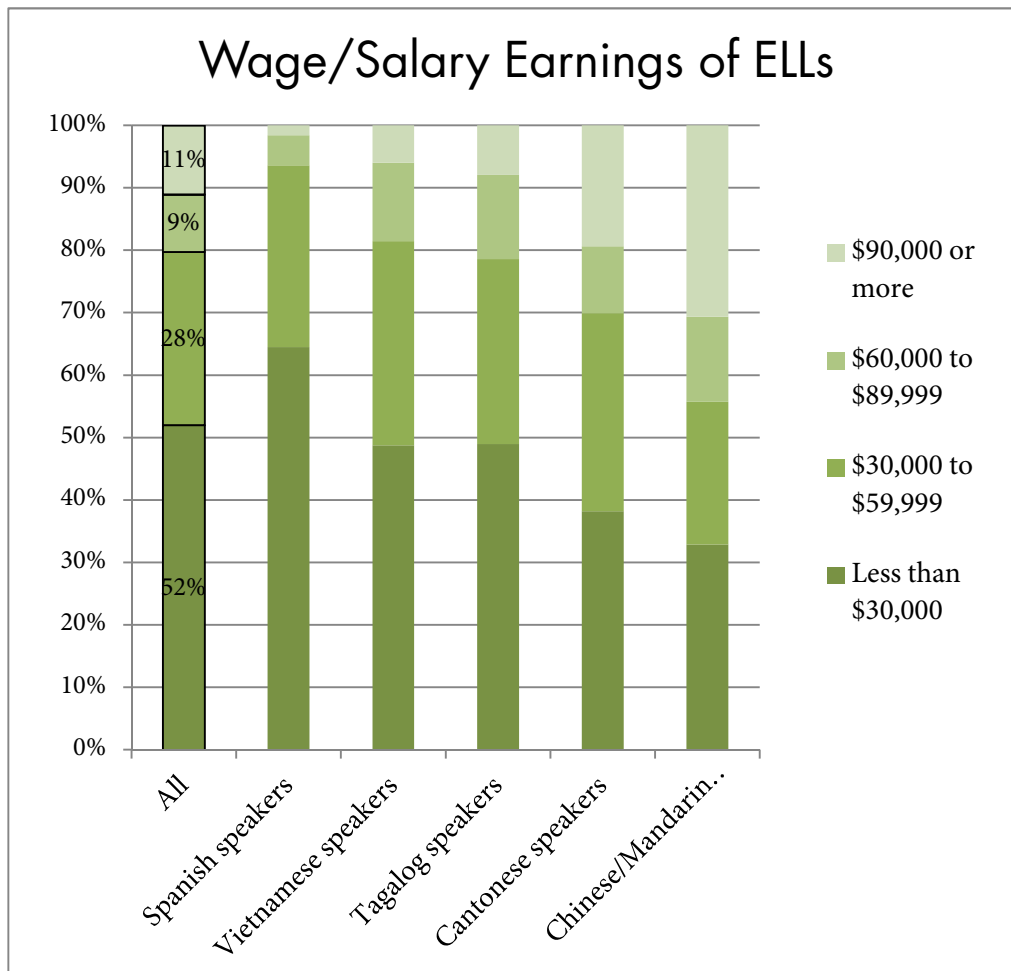
- **Over half (52%) of working English language learners earn less than \$30,000 per year.**
- **Spanish-speakers are the most likely to earn low wages, followed by Vietnamese- and Tagalog-speakers.**

In contrast to the image of Silicon Valley as a high-tech, high-wage employment center, most English language learners working in the region earn low to moderate wages.

Among ELL workers (ages 18 to 64), 52% had annual wage/salary earnings of less than \$30,000, which equates to just below \$15 per hour for a full-time, year-round job. Another 28% earned between \$30,000 and \$60,000. Nine percent earned between \$60,000 and \$90,000; the remaining 11% earned more than \$90,000. By comparison, among *all* workers in Santa Clara

County, only 36% earned less than \$30,000, and 27% earned more than \$90,000.

There is considerable differentiation in ELLs' earnings between different language communities. As shown in the graph below, among the largest language communities, Spanish-speakers are the most likely (64%) to work in jobs paying less than \$30,000, followed by Vietnamese and Tagalog speakers (both at 49%). In contrast, there is much greater diversity in earnings of Chinese/Mandarin speakers: 33% earn less than \$30,000, while another 31% earn more than \$90,000.



CURRENT OCCUPATIONS

- **The top five occupations in which ELLs work are cook, construction laborer, janitor, maid/housekeeper, and personal care aide; four of the five pay less than \$15 per hour.**
- **Higher-wage occupations with notable concentrations of ELLs include software developers, accountants/auditors, engineering techs, registered nurses, and some supervisory or managerial positions.**

In San Mateo and Santa Clara Counties, adult English language learners work in 287 distinct occupations. However, the majority of workers are concentrated in just a few dozen types of jobs.

The top 42 occupations employ two-thirds of all English language learners. A chart of these occupations (all those employing at least 2,000 English language learners), the employment concentration in each, and the approximate median wage is provided on the following page.

Notably, the majority of these occupations tend to be low-wage service sector positions, although there are a few high-wage occupations such as software developer. Of the top 42 occupations, 19 have median wages in Santa Clara County of less than \$15/hr; 36% of all ELLs work in one of those low-wage occupations. At the other extreme, 5 of the top 42 pay over \$50/hr; only

7% of ELLs work in one of these occupations.

There are notable gender differences in the type of jobs employing ELLs. The top three occupations for men are construction laborer, cook, and ground maintenance worker; for women, the top three are personal care aide, maid/housekeeper, and childcare worker.

Different language communities also tend to be concentrated in different occupations, although there is some overlap. As shown in the table below, Spanish-speakers are most likely to be cooks; Chinese or Mandarin speakers to be software engineers; Vietnamese speakers to be “miscellaneous personal appearance workers”, such as at a nail salon; and both Cantonese and Tagalog speakers are most likely to be personal care aides, such as homecare or home health aides.

Occupations Employing the Highest Concentrations of English Language Learners (includes all occupations in which >5% of a given language community works)				
Spanish speakers	Chinese/ Mandarin speakers	Cantonese speakers	Vietnamese speakers	Tagalog speakers
<ul style="list-style-type: none"> • Cooks • Construction laborers • Janitors • Maids & housekeepers • Grounds maintenance 	<ul style="list-style-type: none"> • Software developers, applications & systems • Accountants & auditors 	<ul style="list-style-type: none"> • Personal care aides • Retail salespersons • Accountants & auditors 	<ul style="list-style-type: none"> • Misc. personal appearance workers (e.g., nail salons) • Dishwashers 	<ul style="list-style-type: none"> • Personal care aides • Retail salespersons • Registered nurses

Current Occupations of ELL Adults in Silicon Valley		
Occupation	Percent of All ELLs	Approx. Median Wage (2014 Q1)
Cooks	4.4%	\$11.25
Construction laborers	3.8%	\$20.78
Janitors	3.4%	\$11.39
Maids & housekeepers	3.3%	\$11.37
Personal care aides	3.0%	\$12.32
Grounds maintenance	2.9%	\$13.82
Software developers, applications & systems	2.6%	\$62.75
Cashiers	2.3%	\$10.88
Laborers & hand materials movers	2.0%	\$13.75
Driver/sales & truck drivers	2.0%	\$15.09
Childcare workers	1.8%	\$14.86
Retail salespersons	1.8%	\$11.17
Misc. assemblers & fabricators	1.8%	\$15.81
Waiters & waitresses	1.7%	\$9.34
Misc. managers	1.7%	\$73.39
Inspectors, testers, samplers, sorters & weighers	1.6%	\$20.68
Accountants & auditors	1.6%	\$38.79
Food prep workers	1.5%	\$10.28
Nursing & home health aides	1.5%	\$11.10
Misc. personal appearance workers (e.g, nail salons)	1.3%	\$9.10
First-line supervisors of retail workers	1.3%	\$21.24
Engineering techs, except drafters	1.3%	\$27.21
Electrical & electronics assemblers	1.2%	\$16.14
Misc. agricultural workers	1.2%	\$9.43
Automotive techs & mechanics	1.1%	\$24.95
Food service managers	1.1%	\$25.85
Hairstylists & cosmetologists	1.0%	\$10.44
Carpenters	1.0%	\$28.68
Customer service reps	1.0%	\$21.24
Misc. engineers	1.0%	\$54.59
Misc. metal & plastic workers	1.0%	n/a
Registered nurses	0.9%	\$63.28
Stock clerks & order fillers	0.8%	\$11.84
Designers	0.8%	\$28.52
Electrical & electronics engineers	0.8%	\$59.88
Painters & paperhangers	0.8%	\$24.98
Misc. production workers	0.7%	\$15.07
Taxi drivers & chauffeurs	0.7%	\$13.67
Secretaries & admin assistants	0.7%	\$20.14
First-line supervisors of non-retail sales workers	0.7%	\$41.48
Security guards	0.7%	\$14.17
Dishwashers	0.7%	\$9.02

OCCUPATIONS OF OPPORTUNITY

- **Significant numbers of job openings are projected in a number of occupations in Silicon Valley including occupations accessible without a college degree which typically pay \$15 to \$30 per hour.**
- **The large majority of occupations of opportunity require at least a high school diploma.**

For the purpose of this analysis, occupations of opportunity are defined as those detailed occupational categories that fulfill two criteria. First, it must be among the “occupations with the most job openings” within that county as projected by the California Employment Department; these projections include both new jobs created and replacement job openings. Second, it must have a 75th percentile wage greater than \$15 per hour. (The 75th percentile wage is used in recognition that some jobs may pay a lower wage at the entry level and median, but offer opportunities for advancement with higher pay.)

As discussed in the Demographics section of this report, English learner adults in Silicon Valley carry a wide range of educational backgrounds; there are substantial populations at every level, from those with very little formal education to those holding advanced degrees. Occupations of opportunity for each county are thus presented in two groups: those that require a college degree (associate’s or higher), and those that do not.

It is important to note that the educational level given is the minimum typically required of workers in that occupation. In many

occupations, additional education, training or certifications can give a job applicant an edge even if they are not required, especially in a competitive job market such as exists for many of the occupations listed.

The charts on the following pages show the occupations of opportunity for each county. Note that occupational projections for San Mateo alone are not available; the data shown are for the region that includes both San Mateo County and San Francisco.

Notably, there are few occupations of opportunity open to individuals without a high school diploma or equivalent. In Santa Clara County, there are only three such occupations; in San Mateo/San Francisco, there are six. This presents a significant barrier to the 33% of the adult ELL population who do not possess a high school diploma.

The prevalence of high school diploma as a requirement for entry highlights the importance of access to adult basic education classes, GED preparation, and adult high school completion programs for ELLs’ ability to progress along a career pathway.

Occupations of Opportunity Not Requiring a College Degree Santa Clara County					
Occupation	Projected Job Openings Over 10 Years	25th Percentile Wage	Median Hourly Wage	75th Percentile Wage	Minimum Education Required*
Computer Support Specialists	4,800	\$22.12	\$31.94	\$44.08	Some college + medium-term OJT
Teacher Assistants	3,080	n/a	\$15.39	n/a	HS diploma + short-term OJT
Security Guards	3,460	\$12.07	\$14.17	\$17.25	HS diploma + short-term OJT
Landscaping & Groundskeeping Workers	3,390	\$11.96	\$13.82	\$17.15	Less than HS + short-term OJT
Childcare Workers	2,330	\$11.87	\$14.86	\$16.90	HS diploma + short-term OJT
First-Line Supervisors of Retail Sales Workers	2,900	\$16.37	\$21.24	\$28.65	HS diploma + 1 to 5 years experience
First-Line Supervisors of Office & Admin. Support Workers	4,010	\$23.31	\$30.78	\$39.67	HS diploma + 1 to 5 years experience
Bookkeeping, Accounting & Auditing Clerks	2,800	\$18.26	\$22.40	\$28.42	HS diploma + medium-term OJT
Customer Service Representatives	4,830	\$15.30	\$21.24	\$28.22	HS diploma + short-term OJT
Receptionists & Information Clerks	2,750	\$13.44	\$16.59	\$19.31	HS diploma + short-term OJT
Stock Clerks & Order Fillers	3,450	\$9.58	\$11.84	\$16.77	Less than HS + short-term OJT
Executive Secretaries & Executive Admin. Assistants	3,090	\$23.94	\$31.38	\$37.79	HS diploma + 1 to 5 years experience
Office Clerks, General	5,650	\$12.81	\$18.14	\$23.94	HS diploma + short-term OJT
Carpenters	2,250	\$21.83	\$28.86	\$38.82	HS diploma + apprenticeship
Electricians	2,250	\$21.80	\$29.73	\$39.10	HS diploma + apprenticeship
Laborers & Freight, Stock, & Material Movers, Hand	6,290	\$11.02	\$13.75	\$17.80	Less than HS + short-term OJT

* HS= High school. OJT = On-the-job training.

Occupations of Opportunity Not Requiring a College Degree San Mateo / San Francisco					
Occupation	Projected Job Openings Over 10 Years	25th Percentile Wage	Median Hourly Wage	75th Percentile Wage	Minimum Education Required*
Property, Real Estate, & Community Assn. Managers	1,950	\$16.70	\$34.87	\$54.47	HS diploma + 1 to 5 years experience
Computer Support Specialists	2,250	\$22.12	\$31.94	\$44.08	Some college + medium-term OJT
Teacher Assistants	2,270	n/a	\$16.18	n/a	Some college
Police & Sheriff's Patrol Officers	2,050	\$42.26	\$48.38	\$54.50	HS diploma + medium-term OJT
Security Guards	3,820	\$12.07	\$14.17	\$17.25	HS diploma + short-term OJT
First-Line Supervisors of Food Prep. & Serving Workers	2,870	\$13.93	\$17.91	\$23.01	HS diploma + 1 to 5 years experience
Bartenders	2,860	\$10.40	\$11.53	\$17.28	Less than HS + short-term OJT
Maids & Housekeeping Cleaners	4,570	\$12.66	\$17.59	\$20.86	Less than HS + short-term OJT
Landscaping & Groundskeeping Workers	2,570	\$11.96	\$13.82	\$17.15	Less than HS + short-term OJT
First-Line Supervisors of Retail Sales Workers	1,970	\$16.37	\$21.24	\$28.65	HS diploma + 1 to 5 years experience
First-Line Supervisors of Office & Admin. Support Workers	3,460	\$23.31	\$30.78	\$39.67	HS diploma + 1 to 5 years experience
Customer Service Representatives	4,180	\$15.30	\$21.24	\$28.22	HS diploma + short-term OJT
Receptionists & Information Clerks	2,090	\$13.44	\$16.59	\$19.31	HS diploma + short-term OJT
Stock Clerks & Order Fillers	3,010	\$9.58	\$11.84	\$16.77	Less than HS + short-term OJT
Secretaries & Admin. Assistants	3,510	\$15.91	\$20.36	\$25.79	HS diploma + short-term OJT
Office Clerks, General	5,230	\$12.81	\$18.14	\$23.94	HS diploma + short-term OJT
Carpenters	2,680	\$21.83	\$28.86	\$38.82	HS diploma + apprenticeship
Construction Laborers	2,930	\$17.37	\$24.91	\$29.56	Less than HS + short-term OJT
Maintenance & Repair Workers, General	2,050	\$16.74	\$22.79	\$30.74	HS diploma + long-term OJT
Laborers & Freight, Stock, & Material Movers	3,940	\$11.02	\$13.75	\$17.80	Less than HS + short-term OJT

Occupations of Opportunity Requiring a College Degree Santa Clara County			
Occupation	Projected Job Openings Over 10 Years	Median Hourly Wage	Minimum Education Required*
Marketing Managers	3,410	\$76.13	Bachelor's degree + 1-5 years experience
Sales Managers	2,400	\$74.18	Bachelor's degree + 1-5 years experience
Computer & Information Systems Managers	3,680	\$80.72	Bachelor's degree + >5 years experience
Financial Managers	2,390	\$68.61	Bachelor's degree + >5 years experience
Architectural & Engineering Managers	2,630	\$79.31	Bachelor's degree + >5 years experience
General & Operations Managers	4,700	\$66.97	Associate's degree + 1-5 years experience
Management Analysts	2,970	\$50.00	Bachelor's degree + 1-5 years experience
Market Research Analysts & Marketing Specialists	4,610	\$51.22	Bachelor's degree
Accountants & Auditors	4,230	\$38.06	Bachelor's degree
Computer Systems Analysts	4,080	\$47.24	Bachelor's degree
Computer Programmers	2,150	\$46.21	Bachelor's degree
Software Developers, Applications	11,910	\$57.14	Bachelor's degree
Software Developers, Systems Software	11,590	\$63.58	Bachelor's degree
Network & Computer Systems Administrators	2,750	\$46.36	Bachelor's degree
Information Security Analysts, Web Developers & Computer Network	3,600	\$54.35	Bachelor's degree + 1-5 years experience
Computer Hardware Engineers	3,920	\$59.50	Bachelor's degree
Electronics Engineers, Except Computer	3,730	\$59.02	Bachelor's degree
Lawyers	2,480	\$85.93	Professional degree
Elementary School Teachers	4,280	\$29.42	Bachelor's degree
Secondary School Teachers	2,420	\$35.69	Bachelor's degree
Registered Nurses	5,260	\$60.40	Associate's degree
Sales Representatives, Wholesale & Mfg, Technical & Scientific...	3,090	\$48.16	Bachelor's degree
Sales Engineers	2,050	\$62.77	Bachelor's degree

Occupations of Opportunity Requiring a College Degree San Mateo / San Francisco			
Occupation	Projected Job Openings Over 10 Years	Median Hourly Wage	Minimum Education Required*
Marketing Managers	2,110	\$76.13	Bachelor's degree + 1-5 years experience
Computer and Information Systems Managers	2,620	\$80.72	Bachelor's degree + >5 years experience
Financial Managers	2,220	\$68.61	Bachelor's degree + >5 years experience
General and Operations Managers	5,680	\$66.97	Associate's degree + 1-5 years experience
Management Analysts	5,450	\$50.00	Bachelor's degree + 1-5 years experience
Market Research Analysts and Marketing Specialists	5,630	\$51.22	Bachelor's degree
Accountants and Auditors	6,060	\$38.06	Bachelor's degree
Financial Analysts	2,470	\$51.90	Bachelor's degree
Computer Systems Analysts	3,800	\$47.24	Bachelor's degree
Computer Programmers	2,290	\$46.21	Bachelor's degree
Software Developers, Applications	7,250	\$57.14	Bachelor's degree
Software Developers, Systems Software	4,980	\$63.58	Bachelor's degree
Web Developers	1,910	\$43.14	Associate's degree
Medical Scientists, Except Epidemiologists	2,060	\$52.83	Professional degree
Lawyers	3,640	\$85.93	Professional degree
Elementary School Teachers, Except Special Education	2,800	\$29.42	Bachelor's degree
Registered Nurses	4,790	\$60.40	Associate's degree

OCCUPATIONS OF OPPORTUNITY: ACCESS FOR ENGLISH LANGUAGE LEARNERS

- **Occupations of opportunity that currently employ a large number of ELLs include childcare workers, maids and housekeepers, grounds maintenance workers, construction laborers, hand laborers and freight/stock/material movers, maintenance and repair workers, and carpenters.**
- **Most college-level occupations of opportunity hire primarily individuals who are fluent in English (though they may speak another language at home) and have U.S. citizenship.**

For each identified occupation of opportunity, the graphs on the following pages show the portion of the total workforce (in both San Mateo and Santa Clara counties) who are English learners. They also show the portion of the workforce who speak another language at home, including those who are English fluent. The former provides a measure of an occupation's accessibility to workers who do not speak fluent English; the latter is a more general measure of whether there is a long-term pathway into that occupation for second language speakers.

Among those 23 occupations of opportunity not requiring a college degree, 15 of the occupations have a workforce that is less than 20% ELLs (recall that ELLs are 21% of the overall workforce.) But there are several occupations that employ a large number of ELLs: these include childcare workers, maids and housekeepers, grounds maintenance workers, construction laborers, hand laborers and freight/stock/material movers, maintenance and repair workers, and carpenters.

Among those occupations of opportunity that require a college degree – which are also typically the higher-paying jobs – very few currently employ substantial numbers of workers who are not fluent in English. There are, however, a number of occupations that employ workers who are English fluent but speak another language at home.

This dynamic indicates the importance of pathways to intermediate and advanced ESL classes even for immigrants who have a college or advanced education.

Another important characteristic to note is that, with the exception of some jobs in the tech sector, most of the college-level occupations of opportunity hire primarily U.S. citizens. Only 12% of accountants and auditors are non-citizens, only 10% of financial managers, and only 7% of registered nurses. Access to citizenship services may thus also be important for career advancement.

These data have multiple implications for ELLs, service providers and policymakers:

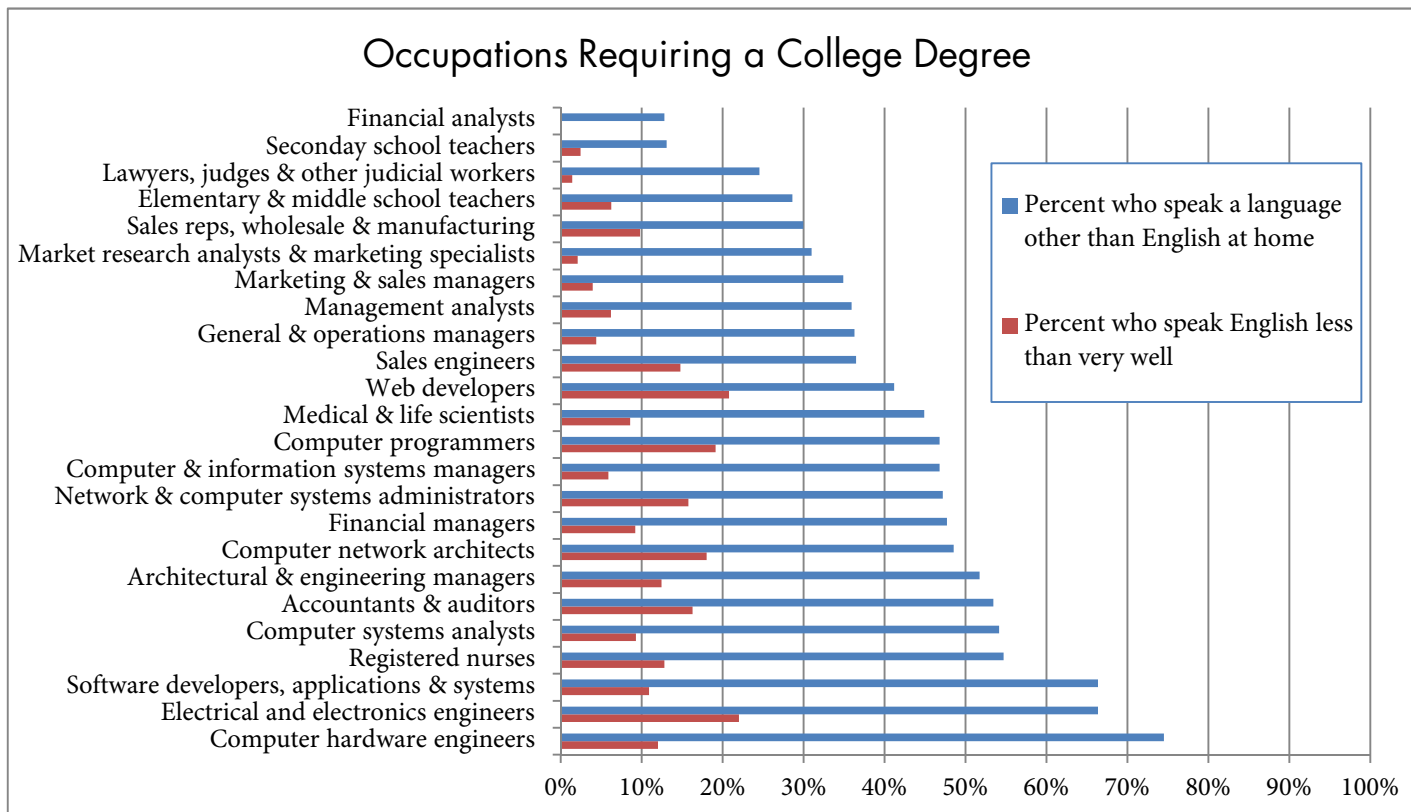
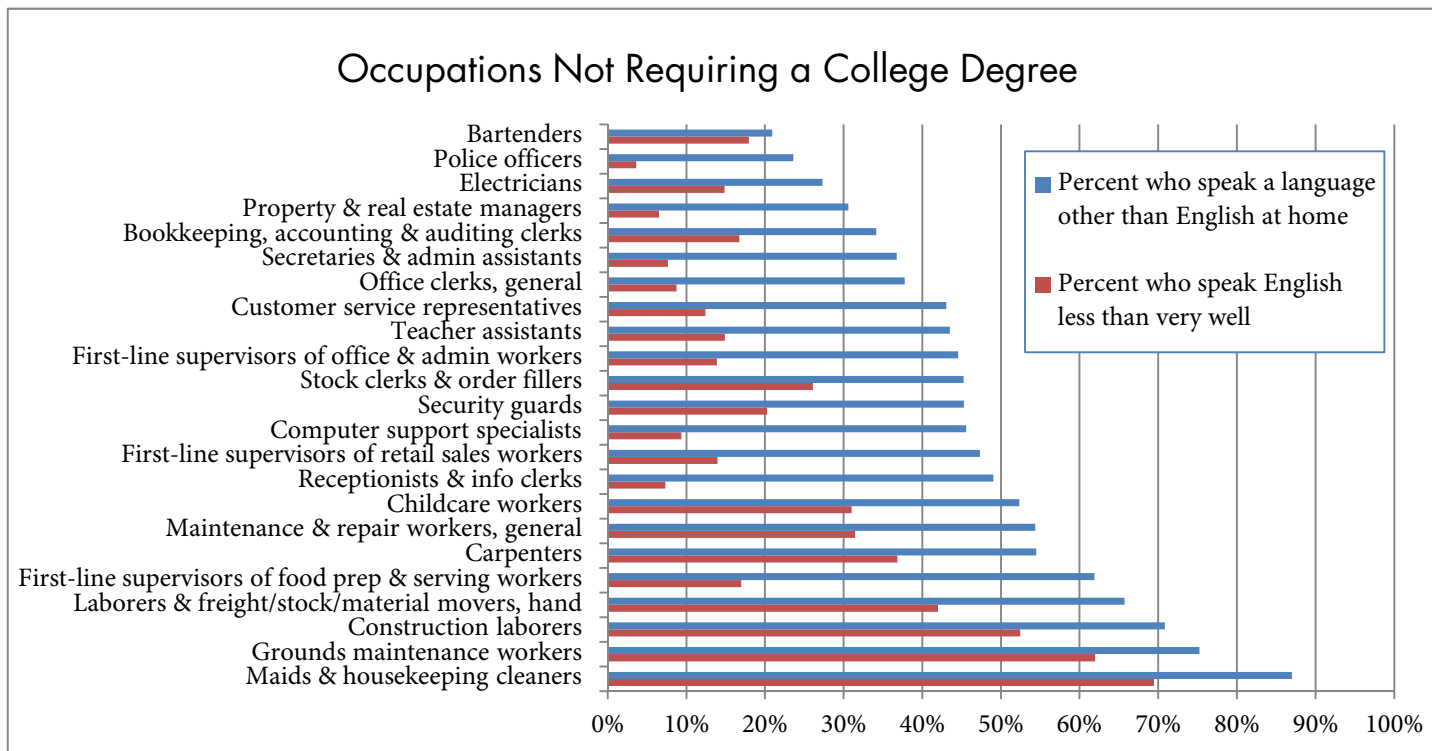
- English learner adults seeking employment and careers are likely to find the greatest access in those jobs that currently employ substantial numbers of English learners. Job counselors assisting ELLs may also find more success in referring clients to jobs where being an English learner appears not to be a major barrier to entry.
- However, agencies developing longer-term sector strategies or career pathway programs may wish to consider the benefits of expanding opportunities for English learners by targeting education and career navigation to open up those occupations of opportunity where there are currently few ELLs.

- In those occupations which employ disproportionately few workers who speak another language at home – even when those workers are English fluent – there may be hidden barriers in the recruitment and hiring process that result in excluding second language speakers for reasons not related to their English ability or job qualifications. In these occupations, there may be a role for employers to examine their recruitment and hiring processes.

Finally, although the listed occupations are projected to have substantial job openings, in the

larger picture there is a dearth of job openings in occupations of opportunity relative to likely jobseekers. Region-wide, there are currently 1.1 million lower-wage workers in the Bay Area, yet projected Bay Area job openings in all middle-wage occupations of opportunity total just 309,000 over the next ten years (30,900 annually).⁶ Absent a change in economic development strategies and growth patterns, ELLs are thus likely to continue to face intense competition for these relatively scarce middle-wage job openings.

Characteristics of Workers in Occupations of Opportunity



ADDITIONAL REFERENCES

With the exceptions noted below, all data provided in this brief are derived from the associated SV ALLIES research brief and are cited therein.

¹ American Community Survey 2013. The Census Bureau does not provide data on all languages, so this is likely an under-estimate.

² Specifically, the geographic areas indicated are the Census Bureau's 2010 Public Use Microdata Areas (PUMAs), which are the smallest geographic areas for which detailed microdata are made available to the public.

³ Migration Policy Institute analysis of U.S. Census Bureau data (2015).

<http://www.migrationpolicy.org/data/unauthorized-immigrant-population/county/6081>

⁴ In 2015, the Federal Poverty Level for a single person is \$11,770. For a family of four, it is \$24,250.

⁵ For a family of four, 100 – 250% FPL is between \$24,250 and \$60,625.

⁶ *Economic Prosperity Strategy for the Bay Area* (Oct. 2014). Metropolitan Transportation Commission.

http://www.wpusa.org/EPS_FullReport.pdf

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