

Contra Costa Community College District Environmental Scan 2025

Prepared by the office of Research and Planning

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Strategic Planning Context

Public Perceptions of Higher Education

Public perceptions of higher education have improved nationally, with 38% of Americans believing it is heading in the right direction, 44% remain unsure, and 19% view it as on the wrong track (Lederman, 2022). Although many Americans recognize the value of college credentials, perceptions are mixed regarding the overall quality of education and benefits for graduates. Trade schools and community colleges are generally considered good alternatives to traditional four-year institutions (Graham, 2024). Concerns about affordability and value persist, but higher education is still recognized for its importance to individual attainment (Kelderman, Elias, O'Leary, 2023).

Locally, the Contra Costa Community College District (4CD) and its colleges are viewed favorably by the community. In January 2024, EMC Research conducted a survey of Contra Costa County voters, which found that the colleges were overwhelmingly rated as providing good or excellent overall quality and educational value. Fewer than 14% of respondents expressed an unfavorable view of the District or its colleges. These results closely mirror findings from a similar survey conducted by EMC Research in October 2013, reflecting a consistent and sustained positive perception of 4CD over the past decade (Bernstein, Smith-Holmes, Louie, & Rogers, 2024).

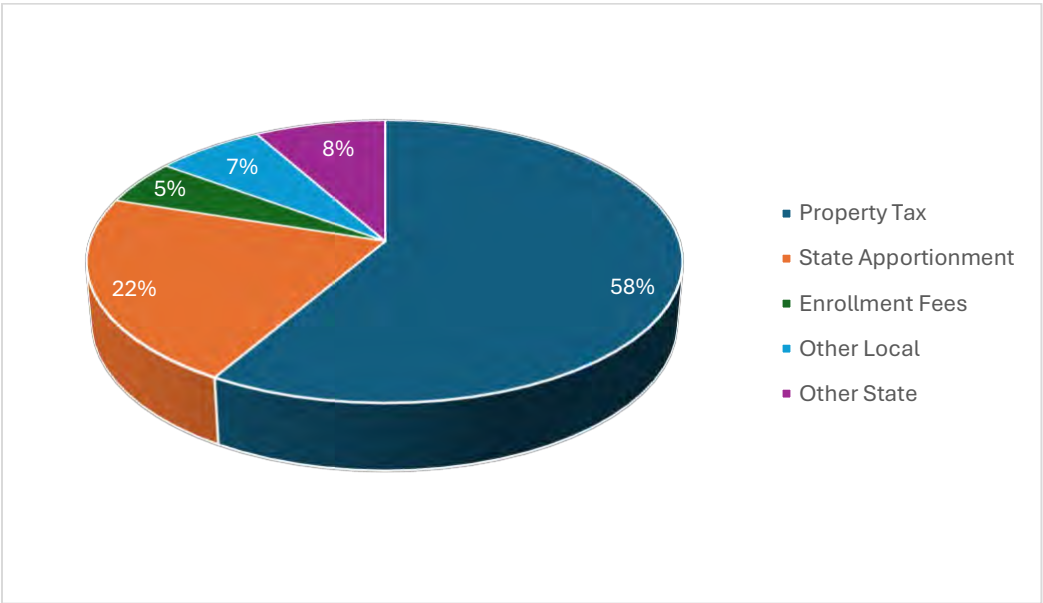
While public perception of higher education has improved, concerns about the cost and value remain. Among Contra Costa County voters, the District and its colleges are viewed favorably and believed to provide a high quality of education.

Financial Overview

California Community Colleges are funded through a combination of state, local, federal, and other revenue sources. A significant portion of this funding comes from Proposition 98, a constitutional amendment that guarantees a minimum annual funding level for K-14 education. Proposition 98 funding for community colleges is based on the Student-Centered Funding Formula (SCFF) and comes from a combination of state General Fund revenue and local property taxes.

4CD is funded through a combination of local property taxes, enrollment fee revenue, and state aid apportionment. While local property taxes account for a significant percentage (58%) of total revenues, 4CD remains dependent on state apportionment revenues to fund the operational budget (see Figure 1).

Figure 1. 4CD Funding Sources



Source. 4CD Finance Services Department, February 2025.

As illustrated in Table 1 below, 4CD’s Fund 11 revenue grew from \$213.8 million in 2020 to \$267.7 million in 2025, representing a growth of 25%, primarily driven by the increase in Proposition 98 revenue. Although local property taxes generate the largest source of funding, they are insufficient to cover the required Proposition 98 guarantee. Consequently, 4CD depends on state support to bridge the gap.

Table 1. Fund 11 Revenue Sources, 2020 vs. 2025

Revenue Sources (Fund 11)	AB 2020	AB2025	5-Year Change	
Property Tax	\$114,224,027	\$156,396,443	\$ 42,172,416	37%
State Apportionment	\$ 46,745,533	\$ 57,687,341	\$ 10,941,808	23%
Enrollment Fees	\$ 16,705,035	\$ 13,659,573	\$ (3,045,462)	-18%
Other Local	\$ 21,095,225	\$ 18,129,818	\$ (2,965,407)	-14%
Other State	\$ 15,017,686	\$ 21,739,825	\$ 6,722,139	45%
Federal	\$ 28,365	\$ 45,830	\$ 17,465	62%
Total	\$213,815,871	\$267,658,830	\$ 53,842,959	25%

Source. 4CD Finance Services Department, February 2025.

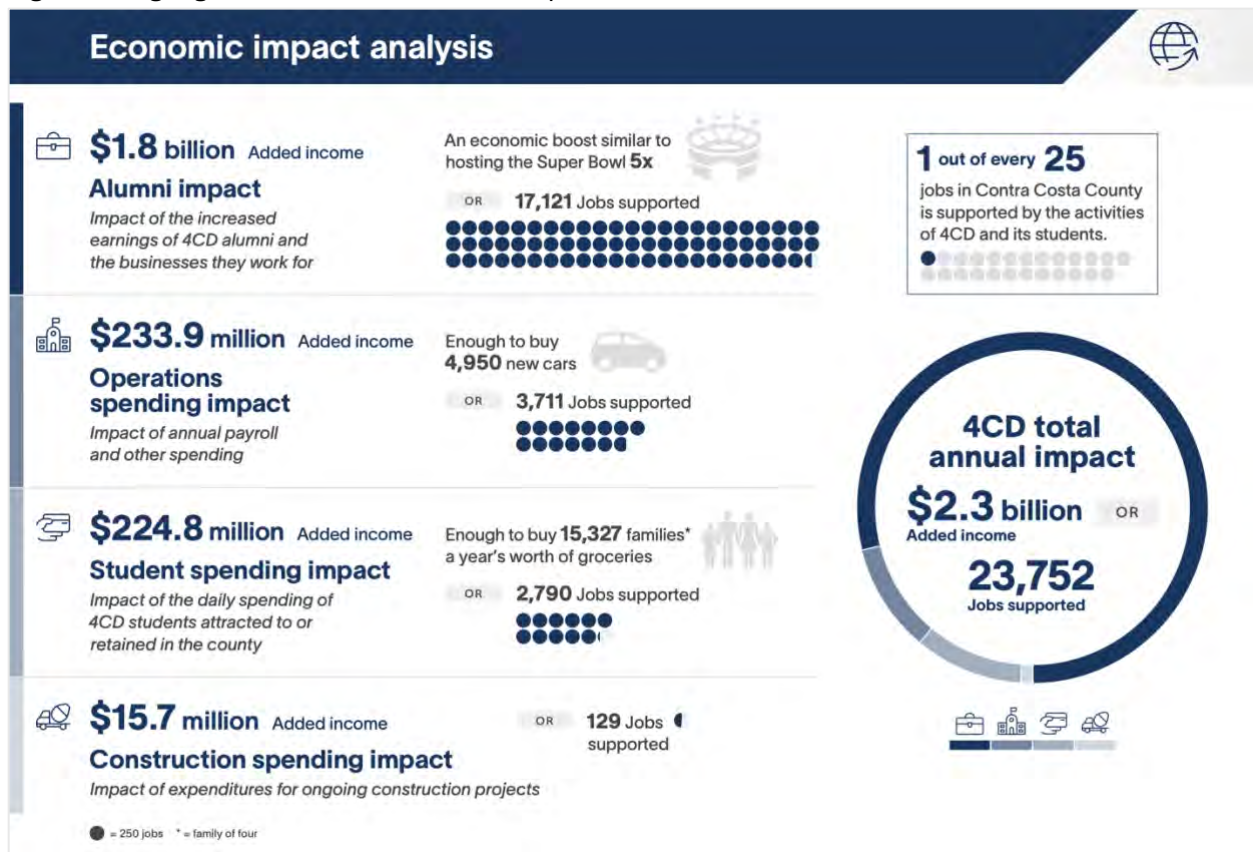
District Profile

In 2024, the District celebrated 75 years of service to Contra Costa County communities. In addition to the state-level context, 4CD's strategic planning effort considers this history as well as the District's service area, financial picture, and student composition.

4CD Economic Contributions

According to a report commissioned by the District, the overall impact of 4CD on the economy is an estimated addition of \$2.3 billion in income annually (see Figure 2). "The additional income of \$2.3 billion created by 4CD is equal to approximately 2.6% of the total gross regional product of Contra Costa County. For perspective, this impact from the District is larger than the County's entire Transportation and Warehousing industry. The impact of \$2.3 billion is equivalent to supporting 23,752 jobs. For further perspective, this means that one out of every 25 jobs in Contra Costa County is supported by the activities of the District and the colleges' students." (Lightcast, 2024, p. 9).

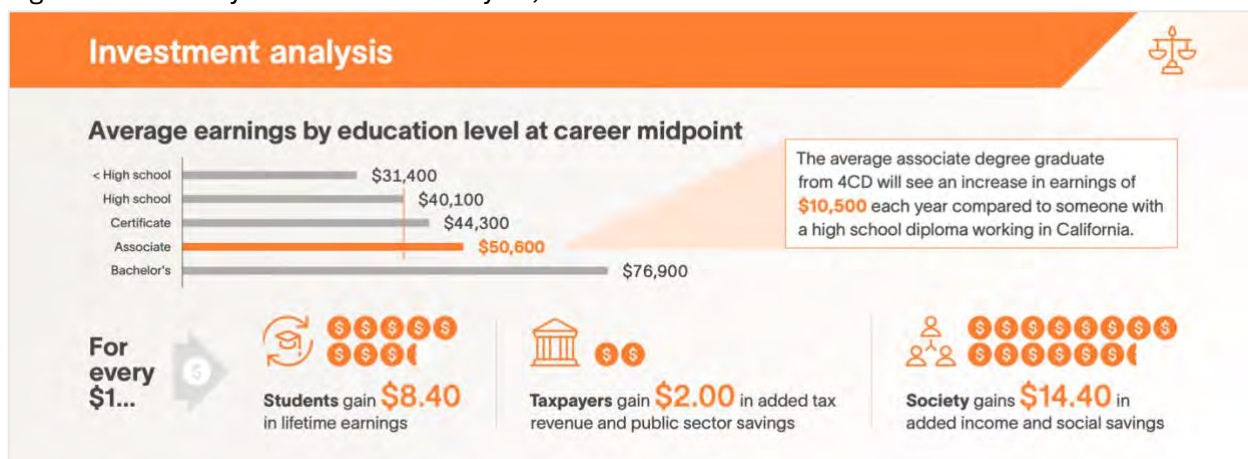
Figure 2: Highlights of District Economic Impact, Fiscal Year 2022-2023



Source. Lightcast (2024). *The Economic Value of the Contra Costa College District* [White paper].

Furthermore, data from this economic impact study reveals that 4CD has a significant positive impact on the economic well-being of county residents and generates substantial financial returns for students and residents. For every dollar of student spending on tuition and fees, students receive, on average, \$8.40 in the form of higher future lifetime earnings. Similarly, for every dollar of public money provided in support of 4CD, taxpayers receive a cumulative value of \$2.00. The return to society in added revenue and social savings is estimated at \$14.40 (see Figure 3).

Figure 3. Summary of Investment Analysis, Fiscal Year 2022-2023



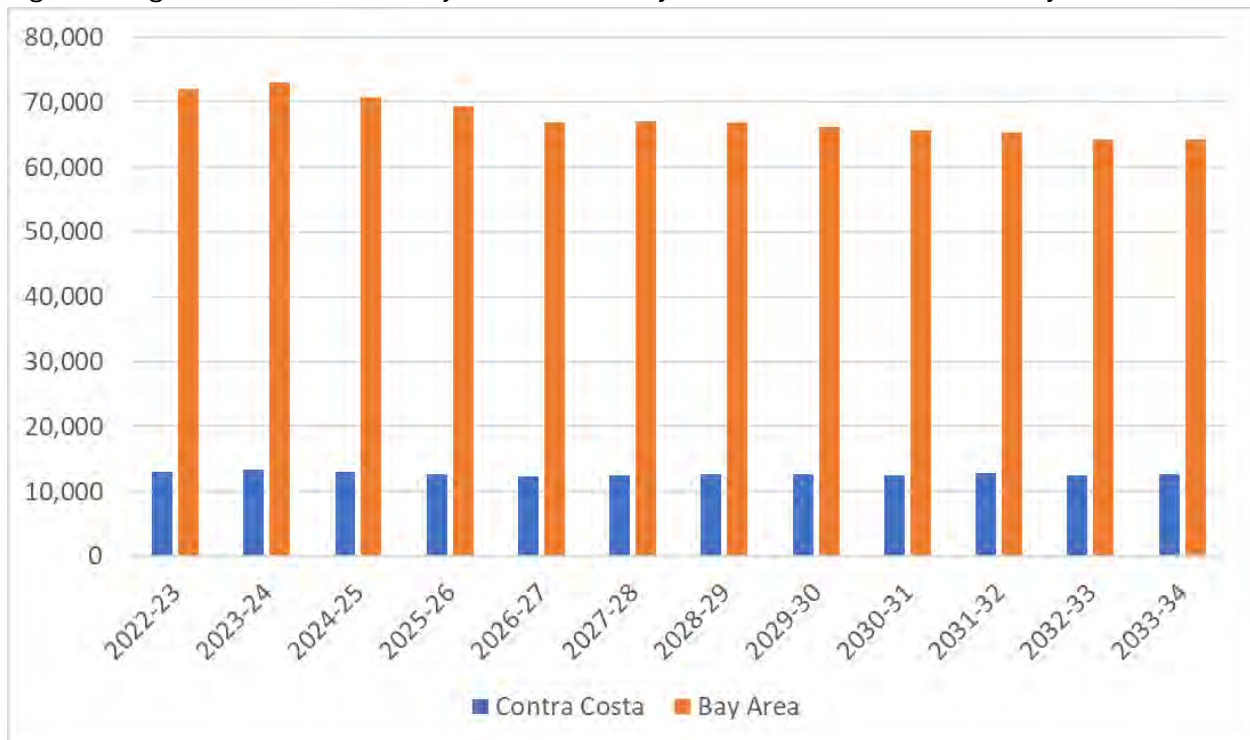
Source. Lightcast (2024). *The Economic Value of the Contra Costa College District* [White paper].

Service Area

Service Area Demographic Trends

A 2023 study by the California Department of Finance predicts small population growth for Contra Costa County at an average of about 0.4% annually through 2033 (Demographics Research Unit, 2024). The population is projected to shift toward more older residents over the next decade. Except for those under 18 and those 65 and older, each age group is projected to remain relatively stable through 2033, with about 70% of the population being 25 or older. However, the number of residents aged 65 and over is projected to increase by about 62,000 people, a 29% increase, while the population under 18 is expected to decrease by about 31,000 people, or 13% (Demographics Research Unit, 2024). This shift in the County's population toward an older population is important to consider as there is expected little to no growth in high school graduates, a traditional source of 4CD enrollments (see Figure 5).

Figure 5. High School Graduate Projection for the Bay Area and Contra Costa County



Note: The Bay Area value is derived from its nine counties.

Source. California Public K-12 Graded Enrollment Projections Table 2024 Series. State of California, Department of Finance - Demographic Research Unit. Retrieved from <https://dof.ca.gov/forecasting/demographics/public-k-12-graded-enrollment/>

Within the County's 25 years or older population, a notable proportion may find value in starting or continuing an associate degree with 4CD. As of 2023, about 382,000 people 25 years old or older, 47%, had not completed an associate degree or higher (see Table 2). As the economic landscape of Contra Costa County evolves over the next 5 to 10 years, understanding and addressing the educational needs of this population will be increasingly important.

Table 2. Educational Attainment, Persons 25 and Older

Educational Attainment	California	California %	Contra Costa County	Contra Costa County %
Total Population 25 year+	26,941,198	100.0%	810,988	100.0%
Less than 9th grade	2,343,992	8.7%	43,968	5.4%
9th-12th grade, no diploma	1,805,154	6.7%	40,273	5.0%
High School/Equivalent	5,496,195	20.4%	143,600	17.7%
Some college, no degree	5,327,128	19.8%	153,775	19.0%
Associate's degree	2,134,368	7.9%	65,156	8.0%
Bachelor's degree	6,035,609	22.4%	221,951	27.4%
Graduate/Professional	3,798,752	14.1%	142,265	17.5%
Degree and Higher				
High school or higher	22,792,052	84.6%	726,747	89.6%
Bachelor's degree or higher	9,834,361	36.5%	364,216	44.9%

Source. Educational Attainment for the Population 25 Years and Over, American Community Survey 5-year estimates. U.S. Census Bureau (2019-2023). Retrieved from <https://censusreporter.org> Table Code: B15003 - Educational Attainment for the Population 25 Years and Over.

The County's residents range across income levels (see Table 3). Contra Costa has a higher proportion of households earning over \$149K compared to the state, but this does not fully offset the high living expenses. The annual livable wage for a single adult with no children is about \$64K in the county, higher than the state's about \$60K (Glasmeier, 2025). Poverty rates vary significantly within the county, from 0% to nearly 30% in different areas. For example, Antioch and San Pablo have poverty rates around 12%, while San Ramon and Lafayette are around 4% (U.S. Census Bureau, 2023). This federal poverty measure likely underestimates the true extent of poverty, as it does not account for the high cost of living in the area.

Table 3. 2023 12-Month Household Income Comparison by County (In 2023 Inflation-adjusted Dollars)

Income Group	California	Contra Costa	Alameda	Marin	Sacramento	Solano
Less than \$49,999	27%	19%	21%	18%	28%	23%
\$50,000 to \$99,999	25%	21%	20%	20%	28%	27%
\$100,000 to \$149,999	18%	18%	17%	14%	19%	21%
\$150,000 to \$199,999	11%	14%	12%	11%	11%	13%
\$200,000 or more	19%	29%	31%	37%	14%	16%

Note. The increment for the income group range was adjusted from \$10,000 to \$50,000

Source. U.S. Census Bureau (2019-2023). Household Income in the Past 12 Months (In 2023 Inflation-adjusted Dollars) American Community Survey 5-year estimates. Retrieved from <https://censusreporter.org>

Service Area Economic Trends and Assumptions

Job growth is projected to continue in the near term (Employment Development Department, 2023), but 2024 saw an increase in unemployment from the prior two years (Employment Development Department, 2025). Additionally, the national landscape could experience significant economic shifts as the Federal administration implements changes to longstanding trade and other economic policies.

Contra Costa County continues to experience economic expansion. Key growth sectors include Health Care; Government; Transportation, Warehousing, and Utilities; Natural Resources and Construction; and Education. Investments in transportation, workforce development, and business incentives support long-term growth, while challenges such as housing affordability and infrastructure demands remain (Beacon Economics, 2025).

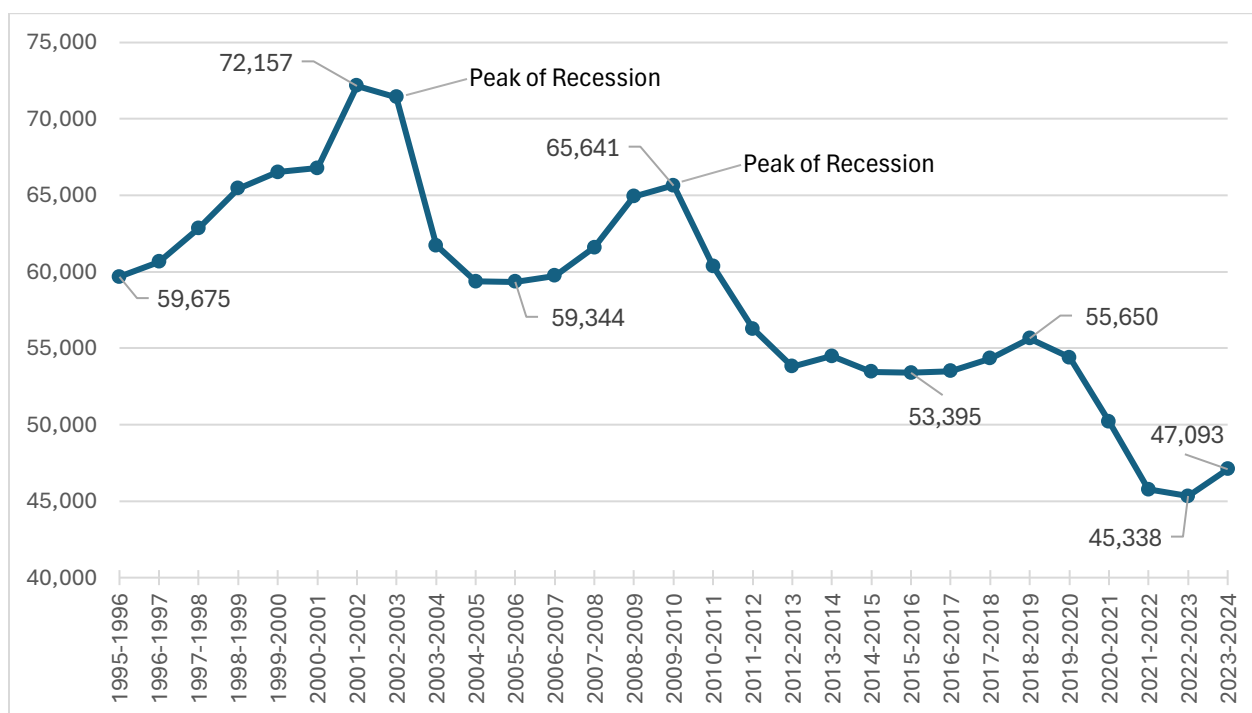
Contra Costa County is a significant hub for oil refineries in Northern California, hosting four of the five refineries in the region. As these refineries age and the shift away from fossil fuels gains momentum, there is an increasing likelihood that some refineries will go idle or close, drastically downsizing their workforce. A recent study outlines several significant impacts that the idling or closing of refineries will likely have on the County (Parks & Baran, 2023). In 4CD's planning context, the potential loss of high-paying jobs that do not require a bachelor's degrees is particularly relevant. 4CD can play a critical role in providing targeting training and reskilling opportunities for individuals affected by refinery downsizing, closures, or the broader shift to a clean-energy economy.

4CD Students

Student Enrollment Trends

After several years of continuing decline, largely due to the impacts of COVID-19, 4CD enrollments have been increasing over the last two years (see Figure 6). Typically, enrollment is driven more by economics in the area than changes in the overall population size. Enrollment tends to increase when there is less economic opportunity in the region. However, during COVID-19 and the related economic downturn, this enrollment trend did not occur, breaking a reliable pattern often used in enrollment planning. The break in this pattern highlights an increasing complexity in peoples' decisions to pursue post-secondary education.

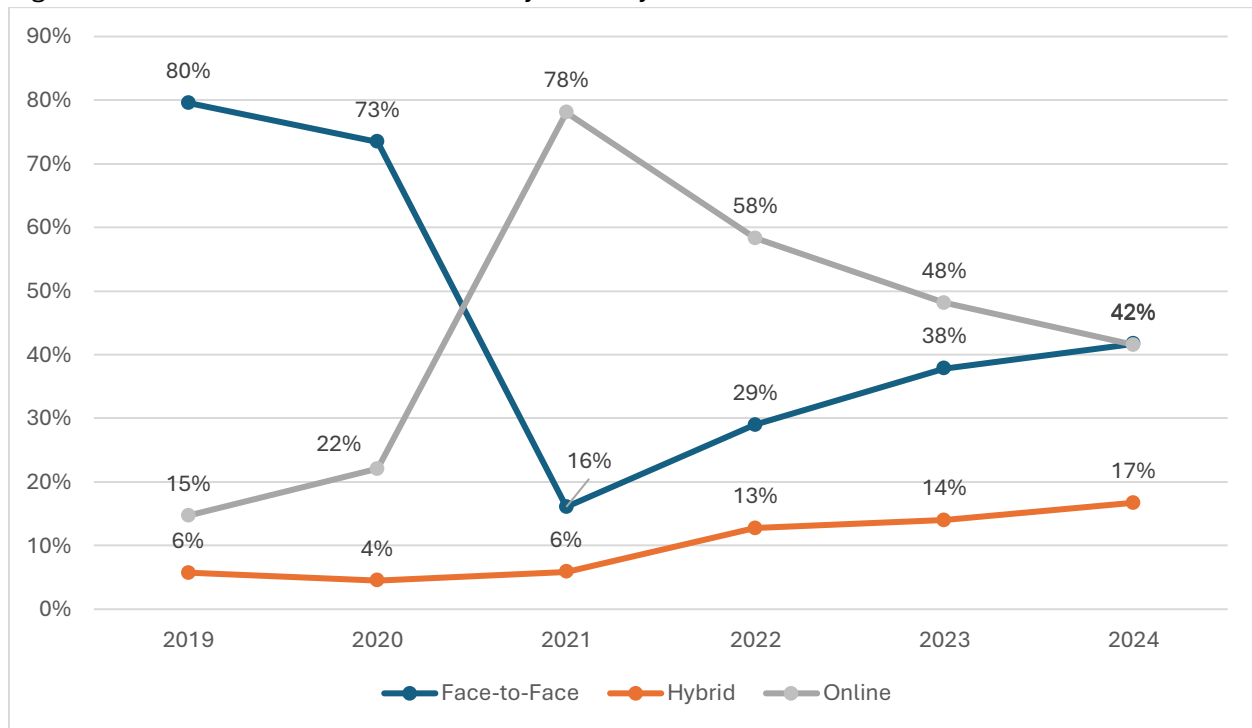
Figure 6. 4CD Annual Headcount



Source. 4CD internal data system retrieved February 2025.

The impact of COVID-19 and the switch to more virtual activities has diversified the learning modalities available to students. Post-pandemic, students continue to take advantage of courses across the three primary modalities: Face-to-face, hybrid, and online. As of fall 2024, the district saw equal enrollment in face-to-face and online courses, with hybrid enrollments showing steady growth (see Figure 7).

Figure 7. Credit Student Fall Enrollment by Modality

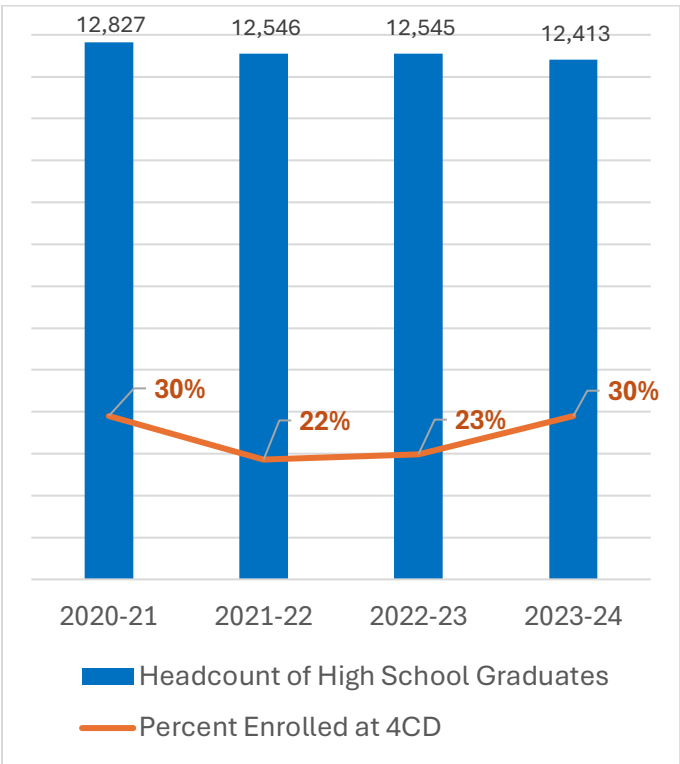


Note. Fall 2020 counts are inaccurate due to guidance from the California Community College Chancellor's Office to maintain prior modality designations for accurate emergency conditions apportionment reporting.

Source. 4CD internal data system retrieved March 2025.

Local High school graduates transitioning to 4CD have historically been a dependable source of enrollment. However, with the expected decline of high school graduates, it will be important to maintain current efforts and explore other recruitment methods for these students. As seen in Figure 8, the number of graduates has declined over the last few years, but fortunately the COVID-19 dip in transitioning students appears to be recovering.

Figure 8. Local High School Transitions to 4CD



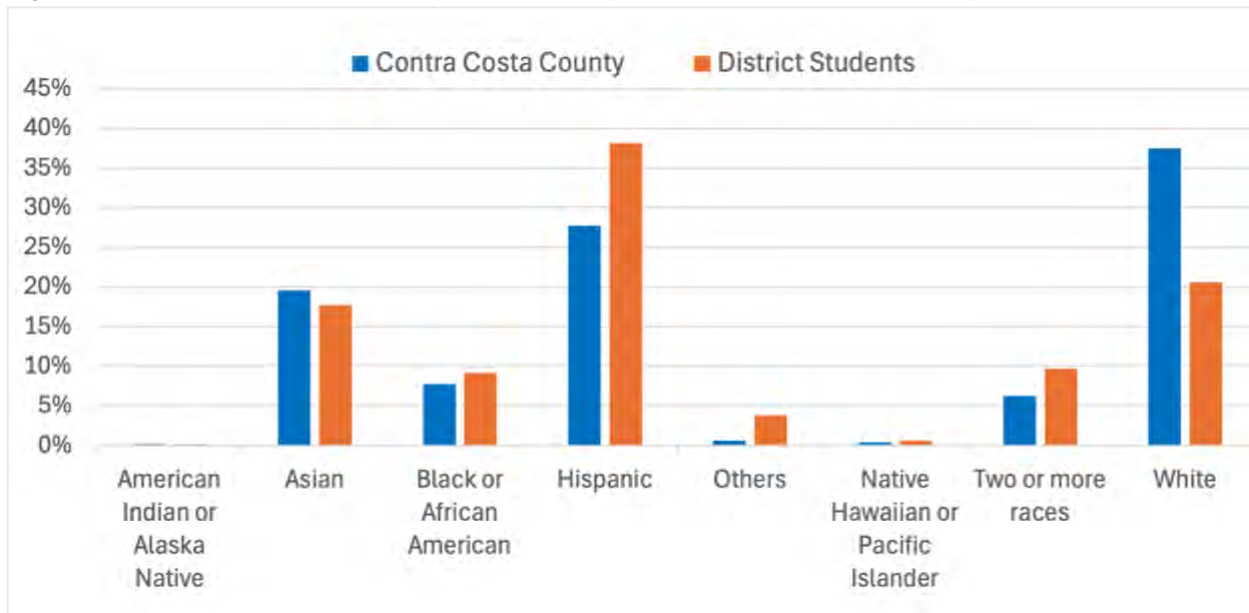
Source. 4CD internal data system, March 2025, and California Department of Education DataQuest. Retrieved from <https://www.caschooldashboard.org/reports/07616480000000/2024/academic-engagement#graduation-rate>

Consistent with broader community college trends, 4CD students tend to be part-time rather than full-time. The five-year average for 4CD is 67% part-time students and 33% full-time students with very little variation around this average.

Student Race and Ethnicity

The demographic makeup of 4CD students broadly reflects the diversity of Contra Costa County. The 4CD student body has higher concentrations of Hispanic, African American, and students identifying as Two or More races (see Figure 9). This diversity is further reflected in the distinct student populations served by each of the District’s colleges (see Figure 10).

Figure 9: 4CD Student Ethnic Composition Compared to Contra Costa County

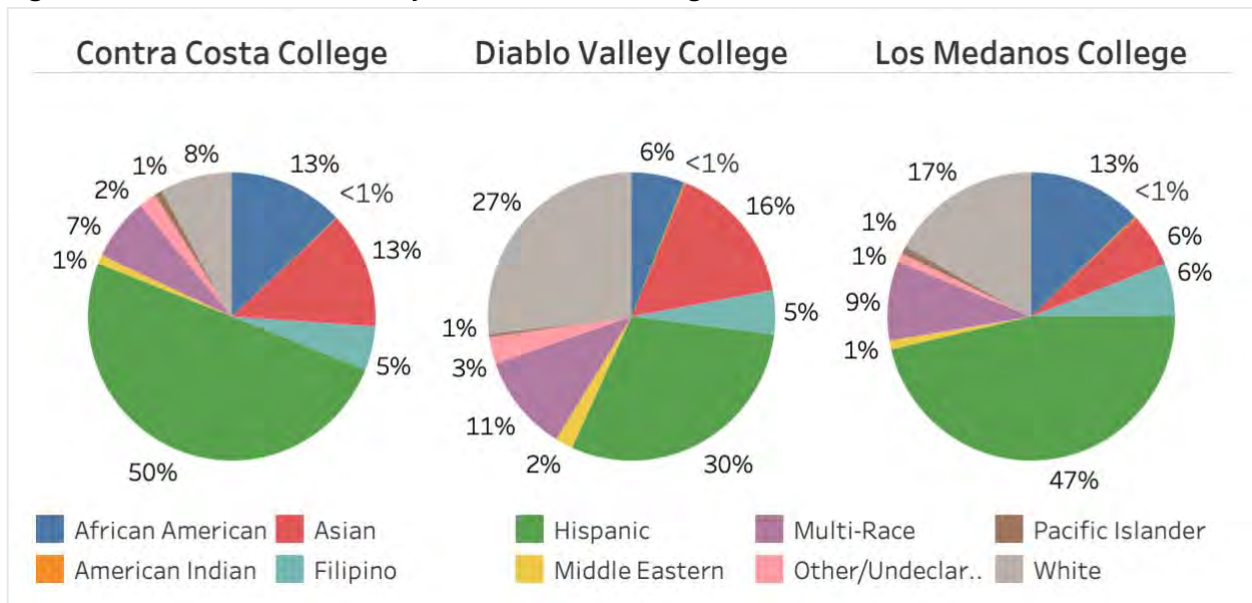


Note. Filipino students were added to Asian category and Middle Eastern students were added to Others.

Source: 4CD internal data system and American Community Survey 2023 1-year retrieved from

<https://censusreporter.org/profiles/05000US06013-contra-costa-county-ca/>

Figure 10. Student Race/Ethnicity across District Colleges



Source. 4CD internal data system retrieved March 2025.

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