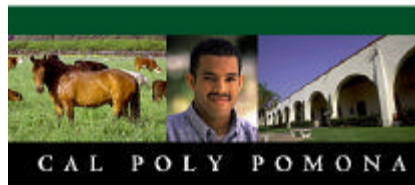


**Assessment of Faculty Housing
Issues at Cal Poly Pomona**



Prepared for:
California State Polytechnic University, Pomona
and the
Office of the Chancellor

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Study Observations

The views expressed in this report are those of the study participants, not necessarily those of the campus community in its entirety or the CSU system. Because the study captures opinions based on the personal experiences of the participants, not all members of the campus community will agree with all expressed concerns or proposed solutions. Nevertheless, every effort was made to capture the “feeling” of the input and the range of issues raised by participants, including some issues that are peripherally related to housing, recruitment or retention. It should also be noted that the study was completed largely during the summer months of 2001, and in some cases people who would have been interested in participating in the study were not available to participate. Overall, 39 individuals participated in the qualitative portion of the study, including 10 administrators, 19 recently-hired faculty, and 10 candidates who declined positions at Cal Poly Pomona.

Executive Summary

Purpose of the Assessment

This report summarizes the research, findings, and conclusions of a Housing Assessment conducted for Cal Poly Pomona. The purpose of the Assessment is to provide a systematic analysis of the impacts of housing costs on the ability of California State University (CSU) campuses to attract and retain faculty and hard-to-hire staff.

The Assessment is based on a combination of quantitative and qualitative data, including analysis of a systemwide survey of recently-hired faculty and staff (i.e., hired in the past four years, January 1997 through December 2000) conducted by the Chancellor's Office in February 2001, a series of ten campus-specific "key informant" interviews of deans and search committee chairs involved in faculty/hard-to-hire staff recruitment, a series of two campus-specific focus groups of 19 recently-hired faculty, and interviews with 10 faculty who declined position offers at Cal Poly Pomona. The Assessment also includes analysis of the market "gap" in the area from which the majority of CSU faculty and staff commute, in order to understand more about the relationships between household incomes and the cost of housing (both rental and for-sale) for existing faculty and hard-to-hire staff.

Overview of Housing Issues

Overall housing is a more critical issue among surveyed recently-hired faculty, support staff than management personal-plan (MPP) staff. According to the recent systemwide survey of housing issues conducted by the Chancellor's office:

- ✍ 67 percent of recently-hired faculty relocated to accept their position,
- ✍ 41 percent of recently-hired faculty and 44 percent of staff rent their housing,
- ✍ 40 percent of recently-hired faculty are dissatisfied with their current housing,
- ✍ 42 percent of recently-hired faculty have considered leaving CSU because of housing issues, and
- ✍ Over 30 percent of recently-hired faculty and staff reported facing financial barriers to homeownership.

Market Gap Analysis

Cal Poly Pomona has a small housing affordability gap between the amount which faculty/staff households can "afford" to pay and the monthly cost of rental and ownership housing in the Pomona marketplace. The analysis indicates that there is a sufficient supply of affordable for-sale and rental housing in the primary commute-shed for Cal Poly Pomona such that virtually all employee households can afford to rent or buy without spending more than 30 percent of their income on housing. For example, larger households (3+ people) with the weakest home purchasing power (income less than \$50,000) can afford to purchase 28 percent of all larger housing units in the Cal Poly Pomona commute-shed, based on current market data for the area. Eighty percent of large households can also afford the average rent for an apartment with two or more bedrooms.

It should be noted, however, that this first analysis conducted did not assess the quality of the available housing stock or neighborhood quality, both of which influence the true viability of housing options.

At the request of Cal Poly Pomona, BAE completed a second analysis which sought to consider the housing desirability factor by focusing on recent sales of houses in neighborhoods which already had a significant number of Cal Poly Pomona Faculty living there. The second analysis found a sufficient supply of affordable housing for small Cal Poly Pomona employee households, but a shortage of affordable housing units for larger households earning between \$50,000 and \$75,000 per year.

Recruitment/Retention and Housing

Contrary to the findings of the market gap analysis, interviewed administrators and search committee chairs viewed the cost of housing near Cal Poly Pomona as a major concern affecting recruitment efforts, particularly in relation to pay. Many administrators interviewed for this report stated that the issue of high housing costs could be overcome during recruitment negotiations if Cal Poly Pomona were able to offer higher salaries.

BAE also interviewed a group of faculty “declinees,” individuals who had declined offers of employment made by Cal Poly Pomona. All of the declinees interviewed report earning higher salaries at their current position than the salary offered by Cal Poly Pomona. Moreover, the salary offer was the primary reason declinees gave for not choosing Cal Poly Pomona. Complaints about salaries were often linked to the cost of housing; as one declinee stated “the salary they offered would not [even] compensate for the cost of living difference.” Declinees also identified a heavier work load and/or a loss of security or title relative to their current position as important reasons for not accepting position offers at Cal Poly Pomona.

While most recently-hired faculty who participated in focus groups felt that housing was not as expensive as perceived, they still identified housing costs as a burden on their households. Recently-hired faculty seeking to purchase homes reported frustration with the long commutes necessitated by the expensive housing market, the quality of schools, and the challenge of saving the required large downpayment. Additionally, focus group participants described the rental market as “very tough.” According to focus group participants, in the LA region, “rents tend to be higher than mortgage payments and tend to increase by about \$100 every six months.”

A large segment of current Cal Poly Pomona faculty who live in the primary commuted-for the campus have two incomes. Based on the surveyed population, Cal Poly Pomona faculty have the highest rate of two-person household incomes in the CSU system. From a recruitment perspective, Cal Poly Pomona’s urban location is desirable in that it offers a wide variety of employment options to the spouse or partner not employed at the University. Consequently, it is likely that Pomona has more difficulty hiring faculty who are the sole contributor to the household income.

A solid majority of recently-hired faculty recruits who accepted employment with Cal Poly Pomona did so for personal reasons. They were willing to accept a lower salary in a higher cost area because they wanted to return to the area to be near family and friends, or because their spouse had a job in the area. Candidates without personal reasons for being

in the LA area tended to base their decision on an economic calculation that found a disparity between offered salaries and the high cost of housing.

Administrators and faculty identified two housing assistance strategies with significant value to them: down payment assistance and temporary faculty housing. Faculty also identified three low-cost strategies which would be useful during recruitment and transition into the new job. The University could provide: short-term housing (for 3-6 months) in University Village or elsewhere; a list of recommended real estate agents; and a map indicating where current faculty live, crime rates by area, and school test scores to help candidates find a suitable neighborhood.

Seventy percent of faculty focus group participants have considered leaving Cal Poly Pomona since accepting their position, primarily due to the cost of housing, high work loads, and urban sprawl. Other campuses in high-cost urban areas like San Jose, San Francisco, and Los Angeles have similarly high rates of faculty who have considered leaving the university because of the cost of housing. If housing prices continue to rise more quickly than household incomes, a likely scenario is that retention may become a more serious issue for the Cal Poly Pomona campus in future years.

Conclusions

Cal Poly Pomona faces a continuing need to recruit high quality faculty and staff in substantial numbers. The general perception that housing costs are high relative to salaries is likely to continue. To mitigate the potential negative impact of this situation and preserve the broadest possible candidate pool, the campus may want to explore housing assistance strategies with high benefit and limited expense to the University. Strategies suggested by those interviewed for this report include:

- ✍ Housing search assistance (realtors, neighborhood information, etc.),
- ✍ Temporary or transitional housing, and
- ✍ Downpayment assistance.

In addition to enhanced housing assistance, research for this report indicated that broader process improvements could be made to increase recruitment success rates for faculty and hard-to-hire staff. These potential improvements should focus on an earlier start to and streamlining of the recruitment process to broaden the applicant pool and improve hiring rates.

Introduction

Purpose of the Housing Assessment

The purpose of the Housing Assessment is to provide a systematic analysis of the impacts of housing costs on the ability of CSU campuses to attract and retain faculty and hard-to-hire staff and to identify opportunities to improve recruitment.

Housing costs in California are among the highest in the U.S. In 2000, the median house sale price in California overall was \$236,400, compared with \$151,000 for the U.S. The highest housing prices in California occur in large urban areas. For example, San Francisco led the state in median housing prices (\$550,000) for a single family home in 1999, followed by San Jose (\$480,000), San Diego (\$340,000), Hayward/Oakland (\$330,000), Los Angeles (\$320,000), and Sacramento (\$250,000).¹ Due to the location of many CSU campuses within these same urban areas, CSU faculty and staff often face high housing costs in their market areas. This market condition can create unique challenges of housing affordability and recruitment for the CSU campuses in these communities.

The CSU system, as the largest public university system in the U.S., faces the challenge of extensive faculty and staff recruitment over the next 10 years as many current faculty members approach retirement age. While the recent *Report on Faculty Recruitment Survey* indicates varying degrees of recruitment success at different CSU campuses and among different disciplines, the Chancellor's Office is interested in assessing the specific impacts of California's high housing costs on this process. The results of this assessment will be used by the campus and the Chancellor's Office as each moves forward in considering various strategies to mitigate housing cost impacts on recruitment.

Twelve of CSU's 23 campuses elected to participate in this study². The remaining campuses elected not to participate, either because housing was perceived to be a less critical issue in their region or because they had already completed significant housing and retention studies of their own.

While this report is specific to the California Poly Pomona campus, the overall study process also includes a Multi-Campus Report which summarizes the findings of the Assessment across all 12 participating campuses. These reports are intended to be useful to the CSU as it considers what initiatives might be feasible and prudent in addressing the underlying housing issues.

Methodology

The Assessment is based on a combination of quantitative and qualitative data, including results of a systemwide survey of recently-hired faculty and staff (i.e., hired in the past four years, January 1997 through December 2000) conducted by the Chancellor's Office in February 2001, a series of campus-specific "key informant" interviews of deans and

¹ 2001, National Association of Home Builders, www.nahb.com

² Participating campuses include: CSU Fullerton, Cal State Hayward, CSU San Marcos, Cal Poly Pomona, CSU Los Angeles, San Francisco State University, CSU Sacramento, CSU Fresno, CSU Northridge, CSU Domingues Hills, Chico State, San Diego State University

search committee chairs involved in faculty recruitment, a series of campus-specific focus groups of recently-hired faculty, and interviews with faculty who declined offers of employment at Cal Poly Pomona. The Assessment also includes analysis of the market “gap” in the area from which the majority of surveyed CSU faculty and staff commute, in order to understand more about the relationships between household incomes and the cost of housing (both rental and for-sale) for recently-hired faculty and hard-to-hire staff.

The following describes the method of data collection from each sources and the approach used to analyze data for this Assessment:

- ✍ **Systemwide Survey** – In February 2001, the CSU Chancellor’s Office conducted a systemwide Housing Assistance Needs Survey of faculty, management, and support staff hired in the past four years, January 1997 through December 2000. The survey instrument was developed in-house, and emailed to more than 7,000 personnel systemwide. Participation in the survey was voluntary. Respondents provided their input using a “radio-button” format and e-mailed their completed questionnaires to the Chancellor’s Office. The Chancellor’s Office conducted data entry and initial analysis of the results. BAE was provided with the raw data and conducted additional analysis of the survey results focused on responses related to housing issues. BAE also cross-tabulated responses in order to ascertain results for key questions from all respondents as well as by employment category and date of hire.
- ✍ **“Key Informant” Interviews** – BAE conducted a series of key informant interviews at each participating campus. The interviews were arranged by a campus liaison based on selection criteria and direction provided by BAE. Targeted key informants included deans, search committee chairs, and other personnel with first-hand recent recruitment experience. For Pomona, a total of 6 interview sessions with 10 individuals were conducted during a two-day visit in early June, 2001. Appendix A presents the interview guide used for the interviews, along with a listing of the departments represented by key informants (note: positions not shown to maintain confidentiality).
- ✍ **Focus Groups** – BAE also conducted two focus groups at Pomona with faculty hired within the last two years. Nineteen faculty participated in the focus groups, which were videotaped to enable effective information collection. The focus groups followed the general focus group guide shown in Appendix B. Additional qualitative information was solicited by the facilitator using campus-specific questions. Focus group participants also completed a confidential one-page survey that compared their CSU offer with either their former place of employment or their other best offer (see Appendix C for sample survey form).
- ✍ **Declinee Interviews** – In addition to the above research, BAE also conducted 10 telephone interviews with faculty who were offered positions at Pomona within the past two years, but declined the offer. Key informants selected the list of potential interviewees and provided the last known contact information for each to BAE. A list of current employers for the interviewees as well as the survey instrument is shown in Appendix D.
- ✍ **Market Gap Analysis** – BAE assessed the extent of the housing affordability gap by comparing campus-specific household incomes (based on responses to the

systemwide survey of recently-hired faculty and staff) with the cost of for-sale and rental housing currently available within the campus' primary commute-shed. BAE analyzed data for recent home sales, current market rental rates, and rental vacancies for units within ten miles of the Cal Poly Pomona campus, the area from which the majority of Cal Poly Pomona employees commute (per survey responses). BAE compared the distribution of these housing costs to the household income distributions for each major employment category at the University to identify affordability gaps.

Overview of Housing Issues: Systemwide Survey

This section summarizes campus-specific results from the systemwide survey of recently-hired faculty and staff conducted by the Chancellor's Office in February 2001. Systemwide, a total of 2,857 out of 7,000 surveyed employees participated in the survey, for an overall response rate of approximately 40 percent. For Cal Poly Pomona, a total of 139 of 355 responded, for a campus response rate of 39 percent. Of the total 139 respondents, 77 respondents were self-classified as Academic Support Staff, 40 respondents as Faculty, and 21 respondents as Management Personnel.

Key findings from the Cal Poly Pomona respondents are as follows:

- ✍ 67 percent of recently-hired faculty relocated to accepting their position,
- ✍ 41 percent of recently-hired faculty and 44 percent of staff rent their housing,
- ✍ 40 percent of recently-hired faculty are dissatisfied with their current housing,
- ✍ 42 percent of recently-hired faculty have considered leaving CSU because of housing issues, and
- ✍ Over 30 percent of recently-hired faculty and staff have financial barriers to homeownership

Overall, approximately 34 percent of all Cal Poly Pomona survey respondents reported relocating from elsewhere in order to accept their current CSU position, a considerably lower rate than systemwide relocation patterns.³ Pomona faculty are less likely to have relocated to accept their current position than surveyed faculty systemwide. According to the faculty focus groups and key informant interviews, the relatively low rate of faculty relocation results from the difficulty of attracting candidates from outside of L.A. due to high perceived housing/living costs.

Table 1: Employee Relocation to Accept CSU Position

<u>Employee Category</u>	<u>CSU Pomona</u>	<u>CSU System</u>
Support Staff	16.9%	20.1%
Faculty	67.5%	76.4%
Management	33.3%	43.8%
All Categories	34.1%	42.7%

Notes: CSU Pomona, N = 138
 CSU System, N = 2,827

Sources: CSU Housing Assistance Needs Survey, 2001; BAE, 2001.

Approximately 62 percent of Pomona survey respondents own their home, a slightly higher ownership rate than systemwide (55 percent owners). Within the job classifications at Pomona, 59 percent of faculty own homes, while 90 percent of recently-hired management employees and 55 percent of support staff are homeowners.

³ Note: Survey Tables 1 - 7 show the percent of respondents that answered affirmatively to the issue represented. Total responses do not equal 100%, because negative responses were not included so that the tables are easier to read. For example Table 1 does not include the percent of people who did not relocate to accept their position, since it is understood to be the remainder of each category. Missing responses were excluded from the analysis as indicated by the value for N.

Table 2: Housing Status by Employment Category

<u>Employee Category</u>	<u>CSU Pomona</u>		<u>CSU System</u>	
	<u>Owner</u>	<u>Renter</u>	<u>Owner</u>	<u>Renter</u>
Support Staff	55.8%	44.2%	50.8%	49.2%
Faculty	59.0%	41.0%	54.9%	45.1%
Management	90.5%	9.5%	68.5%	31.5%
All Categories	62.0%	38.0%	54.5%	45.5%

Notes: Survey respondents who chose "Other (e.g. live with friends)" were considered Renters.

CSU Pomona, N = 137

CSU System, N = 2,817

Sources: CSU Housing Assistance Needs Survey, 2001; BAE, 2001.

At Pomona, recently-hired faculty are less satisfied with their current housing than their staff or management counter-parts. Forty percent of faculty are dissatisfied with their housing, while 19 percent of management and 30 percent of staff are unhappy with their housing. Housing dissatisfaction at Pomona differs only slightly from that of recently-hired CSU employees systemwide.

Table 3: Housing Dissatisfaction

<u>Employee Category</u>	<u>CSU Pomona Dissatisfied</u>	<u>CSU System Dissatisfied</u>
Support Staff	29.9%	31.8%
Faculty	40.0%	42.3%
Management	19.0%	27.4%
All Categories	31.2%	34.9%

Notes: CSU Pomona, N = 138

CSU System, N = 2,829

Sources: CSU Housing Assistance Needs Survey, 2001; BAE, 2001.

Faculty are more likely to have considered leaving CSU as a consequence of housing issues than staff or management. Forty-three percent of recently-hired faculty have considered leaving Pomona because of housing issues, while only five percent of managers and thirteen percent of support staff have considered this action.

Table 4: Employees Considered Leaving Because of Housing

<u>Employee Category</u>	<u>CSU Pomona</u>	<u>CSU System</u>
Support Staff	13.0%	25.9%
Faculty	42.5%	43.8%
Management	4.8%	25.7%
All Categories	20.3%	32.1%

Notes: CSU Pomona, N = 138

CSU System, N = 2,816

Sources: CSU Housing Assistance Needs Survey, 2001; BAE, 2001.

Financial reasons are the most common barriers specified by recent-hires for not owning a home. At Cal Poly Pomona 32 percent of these faculty report financial barriers to homeownership. Forty-eight percent of faculty systemwide report financial barriers to ownership. Forty-four percent of support staff and ten percent of managers report financial barriers to ownership.

Table 5: Financial Barriers to Home Ownership

<u>Employee Category</u>	<u>CSU Pomona</u>				<u>CSU System</u>	
	<u>Can't afford down-payment</u>	<u>Can't afford monthly payment</u>	<u>Other debts too high</u>	<u>Other financial reason</u>	<u>Total with financial barriers</u>	<u>Total with financial barriers</u>
Support Staff	16.7%	11.1%	5.6%	1.9%	35.2%	44.6%
Faculty	17.9%	3.6%	10.7%	0.0%	32.1%	47.7%
Management	12.5%	0.0%	6.3%	0.0%	18.8%	29.3%
All Categories	16.3%	7.1%	7.1%	1.0%	31.6%	43.8%

Notes: CSU Pomona, N = 138

CSU System, N = 2,018

Sources: CSU Housing Assistance Needs Survey, 2001; BAE, 2001.

Support for home purchase assistance programs is very high at Cal Poly Pomona. Programs which focus on monthly mortgage, down payment and closing costs assistance were most favored. Down payment assistance received the most support with 73 percent of surveyed employees favoring it.

Table 6: Employees that View Housing Assistance as Important

<u>Employee Category</u>	<u>Mortgage Assistance</u>	<u>Down Payment</u>	<u>Closing Costs</u>	<u>Renovation Loan</u>	<u>Relocation Information</u>	<u>Loan Information</u>
Support Staff	66.2%	79.2%	66.2%	52.7%	62.2%	71.4%
Faculty	69.2%	64.1%	66.7%	28.6%	62.2%	54.1%
Management	42.9%	66.7%	61.9%	33.3%	42.9%	52.4%
All Categories	63.5%	73.0%	65.7%	43.1%	59.1%	63.7%

Notes: CSU Pomona, N = 137

Sources: CSU Housing Assistance Needs Survey, 2001; BAE, 2001.

Faculty Recruitment

Attraction Factors

Cal Poly Pomona's deans and search committee chairs found commonality in their assessment of key factors that help attract new faculty to the campus. The campus primarily attracts faculty from the immediate LA Basin; a majority of new hires already live in the LA area, and for some of these candidates, the ability to drive a "reverse commute" was reportedly an important job consideration. In addition, the campus attracts retirees with pre-existing retirement income allowing them to accept lower pay faculty positions. Other factors noted included the appeal of Southern California's ethnic diversity to foreign-born and minority candidates. Finally, administrators judged that Pomona attracts faculty who appreciate the physical environment of the campus, the emphasis on teaching, the reputation of Cal Poly Pomona, the quality of students (who are also attracted by Cal Poly Pomona's reputation), and the rural "feeling" in a metropolitan area.

Faculty focus group participants, in contrast, stated that they came to the University primarily because of Pomona's location close to family or friends, or because participants already lived in the area. Recently-hired faculty were specifically attracted to Cal Poly Pomona versus other CSU campuses in the LA region because of Cal Poly Pomona's reputation, the reputation of individual departments, job fit and satisfaction, or a personal acquaintance within the existing faculty who could provide the "inside scoop" on departmental activities. Recently-hired faculty were also drawn to Cal Poly Pomona because of its "rural setting in an urban area," the academic connections to other area universities (e.g., other CSU campuses and UCLA), and job opportunities for spouses in the area.

With respect to obstacles in attracting new faculty, administrators and recently-hired faculty identified many common factors, specifically: salaries that have not kept pace with the cost of living and the cost of housing, CSU teaching loads, traffic congestion, smog, and the isolation and lack of "community" within the Los Angeles region.

The Recruitment Process

In general, recently-hired faculty felt that they had a very positive recruitment experience. The most frequently mentioned positive aspects were the warmth, friendliness, and quality of interaction with faculty peers. Recently-hired faculty were also pleased with the accommodations at Kellogg West (where many new hires stayed during the interview process), the speed with which verbal offers were made by individual schools and departments, and staff responsiveness to questions of every nature.

To improve the process with respect to housing issues, recently-hired faculty suggested the following:

- ✍ Schedule campus interviews so that candidates can stay the weekend to explore the area and housing options.

- ✍ Provide more detailed information about living in the area, such as a map with locations of where current faculty live, information on neighborhood quality, housing costs, and a tour with a recommended real estate agent.

In addition, recently-hired faculty suggestions about process improvements unrelated to housing included as follows:

- ✍ Reduce the quantity of documents currently required by various departments that must be completed prior to the candidate interview. For example, recently-hired faculty found that the requirement to supply an official set of transcripts, a college employment application, and letters of recommendation were particularly burdensome given that these had to be produced prior to being granted an interview.
- ✍ Provide the formal written offer from the university more quickly.
- ✍ Encourage more faculty and students to attend candidate presentations.

Administrators also suggested recruitment process improvements, including the following:

- ✍ Simplify paperwork required prior to scheduling interviews. Administrators explained that their current understanding of their department's process was cumbersome and lengthy and in some cases required over 30 documents to be completed. Consequently, many candidate files are not completed in a timely manner and are, therefore, not included in the qualified applicant pool. This has possibly reduced the number of applicants in the pool and may, as a result, be lowering the quality of eligible candidates. Administrators recommended that official transcripts and reference letters could be requested of candidates once the short list of interviewees is finalized, rather than requiring all candidates to submit them at the beginning of the application process.
- ✍ Initiate searches in the summer; otherwise Cal Poly Pomona is at a disadvantage relative to semester campuses.
- ✍ Expedite written offers. Some administrators were concerned that some candidates were lost because formal offer letters were not sent quickly enough.

Committee chairs and administrators expressed concern regarding the quality and size of their applicant pools. Many noted that the size of applicant pools has decreased from roughly 30 to 15 applicants in recent years, with some department chairs experiencing applicant pools of less than 10 candidates. Some search committee participants reported cases where they could not identify a qualified candidate to successfully complete the recruitment process. In addition, some departments routinely accepted 2nd choice and lower ranked candidates because they are unable to attract their top choice. Depending on the department, the top candidate was hired in zero to 50 percent of the searches, the second best candidate was hired in 10 to 75 percent of searches, and the third choice or below was hired in 10 to 100 percent of searches.

Based on similar discussions held at other CSU campuses for this report, the paperwork burdens imposed by some departments on Cal Poly Pomona faculty candidates appear to be high. Also, interestingly, other campuses in the LA region reported larger applicant pools during their recruitment processes.

Comparison of Faculty Offers

Based on confidential survey forms collected during the focus groups with recently-hired faculty at Pomona (n=19), more than half of recent hires in the focus group received two or more offers during their job search. On average, candidates received 2.1 offers.

- ✍ Among focus group participants, the average of all salary offers to candidates who accepted employment at Pomona was \$2,891 less than the salary of the employee's other top offer or previous employer.
- ✍ Candidates with more than one employment offer received an average of \$869 more from Cal Poly Pomona than from their other top offer. Candidates with only their offer from Pomona received \$9,781 less from Pomona than they earned at their previous employer. In other words, candidates who leave employers with only one offer tend to receive less pay while candidates with more than one offer tend to receive higher pay at Pomona relative to their other offers.
- ✍ Roughly one quarter of candidates with multiple offers accepted employment at Cal Poly Pomona even though they received more generous offers from another employer.

Focus group participants were also asked to record the top three factors that influenced their decision to accept a faculty offer at Cal Poly Pomona. The most frequently selected reasons for accepting the CSU offer, as shown in Table 7, were salary and personal connection to the area (such as friends or family living in the area).

Table 7: Offer Comparison for Cal Poly Pomona vs. Other Employer

	Percent Ranking Cal Poly Higher than Other Employer	Top Three Decision Factors
Salary	56%	24%
Benefits	30%	4%
Work load	86%	4%
Job fit/satisfaction	93%	12%
Research opportunities	36%	12%
University reputation	62%	4%
Quality of life	42%	12%
Spouse job opportunities	67%	8%
Personal connection to area	75%	20%

Based on 10 declinee interviews conducted by BAE, almost all declinees earn better salaries in their current position than the salary offered to them by Cal Poly Pomona. For most candidates, this was the primary reason they chose not to come to Cal Poly Pomona. However, salary discussions were always tied to the cost of housing; as one declinee stated “the salary (Pomona) offered [though higher than the salary at the position accepted] would not even compensate for the cost-of-living difference.” Candidates also declined positions at Cal Poly Pomona because it entailed a heavier work load, especially given the quarter system which requires more class preparations than in a semester system (e.g. the quarter calendar typically requires faculty to prepare 9 course syllabi and lecture notes, while campuses with the semester calendar must prepare 8 course syllabi and lecture notes); and/or a loss of security or title (e.g., a change from tenured Full Professor

to untenured Associate Professor, or from Associate Professor to a more junior faculty position).

Most declines said a higher salary offer was the most important action that Cal Poly Pomona could have taken to induce them to accept the offered position.

Housing and Recruitment

Administrators believe that the perception of high housing costs inhibits many qualified candidates from even applying to Cal Poly Pomona. While the relationship between high housing costs and salaries was well understood by administrators, in most cases, administrators reported insufficient latitude to increase the salary offer to address this problem. Administrators also noted that high housing costs limit the University's ability to recruit faculty from outside the LA area, especially if candidates have families. This view was largely corroborated by interviews with declines who felt that the high cost of housing was a "big disincentive" to accepting an offer from Pomona.

Thus, the combination of high housing costs, the inability to increase salary offers, burdensome recruitment processes tend to decrease the size of candidate pools which negatively affects the outcome of the recruitment process.

With respect to those candidates who did accept Pomona offers, administrators noted that the biggest housing issues facing the new faculty were the cost of for-sale housing, the difficulty in saving down payments and finding an affordable neighborhood with good schools. Faculty seeking to own a home reported frustration with the long commutes necessitated by the housing market.

Most recently-hired faculty participating in focus groups also noted the challenge of saving a sufficient down-payment. Faculty found creative solutions to this challenge including: teaching additional courses for several summer sessions, borrowing funds from a family member or budgeting a spousal salary towards a down-payment savings account. In addition, focus group members felt intimidated by LA's housing market, making it "difficult to figure out the right time to buy." Most focus group participants felt that housing was not as expensive as perceived, but nevertheless a burden to their households.

Recently-hired faculty focus group participants at Cal Poly Pomona described the rental market for new hires as "very tough." One interviewee noted, "In the LA region, rents tend to be higher than a mortgage and seem to increase by about \$100 every six months." With low vacancies rates, faculty found that most advertised units are either of low quality or very expensive. The best way to find rental housing was "through word of mouth and networking." The typical faculty member took three to six months to find adequate rental housing.

Based on research conducted by BAE for unrelated projects, it should be noted that many of these reported concerns reflect general first-time buyer concerns with entering the housing market. These concerns tend to be more acute when salaries or household incomes are relatively low, housing prices are high, and the household does not have equity earned from the ownership of a prior housing unit.

Housing Strategies

Administrators and faculty felt that two housing assistance strategies offer significant value, namely:

- ? Provide downpayment assistance, which is critical for recently-hired faculty with student loan burdens and little or no savings.
- ? Provide temporary faculty housing, which would offer an opportunity for newly hired faculty to become familiar with the LA region before looking for a permanent home and give them additional time to focus on teaching during their first year.

Faculty identified a number of low-cost strategies which would help with housing issues during recruitment and transition, including:

- ✍ Provide a “layered” map indicating where current faculty live, crime rates by area, and school test scores. This would help candidates find a suitable neighborhood among the numerous options offered by the Los Angeles Basin housing market.
- ✍ Provide a list of recommended residential real estate agents, or contract with a relocation specialist to assist newly hired faculty and their families.
- ✍ Offer short-term housing (for three to six months) in University Village or elsewhere, which would allow faculty “to settle into the job and search effectively” for rental housing or to purchase housing.

Retention

Administrators felt that retention is an issue only in hard-to-hire competitive fields such as computer science, business, and math, because of the salary discrepancy between CSU and the private sector. Administrators felt that retention is not currently a problem for other departments and that housing costs do not currently affect retention at Cal Poly Pomona. Administrators also expressed concern that some salary concessions made to more-recently hired faculty could contribute to dissatisfaction among faculty hired three to five years ago and could lead to higher turnover in the future.

Expected retirements of long-term faculty is also a concern among administrators at Cal Poly Pomona. This flood of retirements within the next five years will increase the level of new faculty hiring in the very near future.

Discussions with recently-hired faculty in the focus groups indicated that retention may be an important issue from their perspective. Seventy percent of focus group participants have considered leaving Cal Poly Pomona since accepting their position. The primary reasons noted by participants were:

- ✍ The cost of housing,
- ✍ High work loads, particularly committee and teaching loads and their impact on time for research and personal life,
- ✍ Urban sprawl and pollution,
- ✍ Lack of support for junior faculty, and
- ✍ Personal feelings that diversity is not fully embraced.

Market and Affordability Gap Analysis

Many regions of California have experienced dramatic increases in the cost of housing during the past decade. In some cases, home prices and rental rates have created an affordability gap for CSU employee households, similar to that faced by many moderate income households across the state.

To assess the relationship between Cal Poly Pomona employee household incomes and housing market conditions, BAE compared CSU employee household income distributions (and corresponding maximum “affordable” housing payments) with the price distributions for housing currently available within the campus’ primary commute-shed.⁴

Methodology

To analyze the relationship between campus employees’ household incomes, affordable units, and market supply available for sale or rent, the following assumptions were used.

The primary commute-shed for Cal Poly Pomona was defined as a circle of twenty miles in diameter with the Cal Poly Pomona campus in its center. The selection of this target area was based on analysis of campus employee survey results, which indicated a majority of recently-hired campus employees live within this distance of the campus. This primary commute-shed includes cities as far west as El Monte and as far east as Ontario.

It is important to note that this definition accounts for distance, but not for the quality of neighborhoods, school districts, or housing unit characteristics within the commute-shed area. Thus, while a housing supply may exist that is “affordable” to a campus employee household, the actual desirability of any given unit, on a subjective basis, will vary for each family.

A for-sale housing unit was defined as “affordable” to a household if no more than 30 percent of the household’s monthly income is spent on principal, interest, taxes, and insurance (known as PITI). This is a standard assumption used nationally by housing analysts and economists. BAE has further assumed a 30 year mortgage with a five percent down payment, an interest rate of 7.25 percent, and a private mortgage insurance rate of 0.5 percent in calculating mortgage costs (generally required by lenders when downpayments are less than 20 percent of sale price). Given these assumptions, a household earning between \$50,000 and \$74,999 a year can afford to purchase a home for between \$160,000 and \$234,999.

To further refine the analysis, the data regarding households was disaggregated by household size, to better match affordable unit size with recently sold units (also disaggregated by size). Specifically, the income distribution of smaller households (those with one or two persons) were compared with sale prices for houses and condominiums with two or fewer bedrooms. The income distribution of large households (three or more

⁴ Household income data was gathered from the CSU Housing Assistance Needs Survey, which included 139 respondents from Cal Poly Pomona. Of Cal Poly Pomona respondents, 77 people classified themselves as Academic Support Staff, 40 as Faculty, and 21 as Management Personnel. Unfortunately, household income data was gathered in \$25,000 intervals, limiting the specificity of the analysis.

persons) were compared with larger homes and condominiums, i.e., those with two or more bedrooms. The analysis includes the results of all employees (faculty, MPP, and support staff) as well as a separate analysis of faculty households respondents to the housing survey conducted by the Office of the Chancellor.

For-Sale Housing

Small Households

Table 8 compares the income distribution of smaller households who responded to the CSU survey with the distribution of current sales prices for one and two bedroom condominiums and single-family homes.⁵ (Note: additional housing data detail in available in Appendix E.) As indicated in Table 8, both condominiums and single-family homes sold at prices that were affordable to most small Cal Poly Pomona employee households; i.e., for the 34 percent of Cal Poly Pomona employee households earning less than \$49,999, 100 percent of the one and two-bedroom condominiums and 71 percent of the single-family homes are affordable.⁶ However, one and two-bedroom units comprise only 22 percent of all units on the market, while small households comprise 47 percent of all Cal Poly Pomona households. So while units are generally affordable, finding an appropriate unit may be more difficult for small households than for larger households.⁷

Only ten percent of faculty households earn less than \$49,999, so faculty households are better able to purchase a home than Cal Poly Pomona employees generally. It should be noted that recently-hired Cal Poly Pomona faculty have the highest percent of two-income households in the CSU system: over 67 percent of households have more than one income. Thus, working spouses or partners enable higher household incomes for Cal Poly Pomona faculty, which in turn improves housing affordability.

Table 8: Cal Poly Pomona Housing Affordability for Small Households (1-2 person households)

Income Range	Employee Household Income Distribution	Faculty Household Income Distribution	Affordable Home Price	Percent of Small* Single Family Homes on the Market	Percent of Small Condos on the Market	Percent of All Small Units on the Market
Less than \$24,999	3%	0%	Less than \$80,000	4%	3%	3%
\$25,000 - 49,999	31%	10%	\$80,000 - \$159,999	67%	97%	79%
\$50,000 - 74,999	22%	29%	\$160,000 - \$234,999	29%	0%	17%
\$75,000 - 99,999	16%	19%	\$235,000 - \$314,999	0%	0%	0%
\$100,000 - 124,999	14%	24%	\$315,000 - \$394,999	0%	0%	0%
\$125,000 - \$149,999	12%	14%	\$395,000 - \$474,999	0%	0%	0%
\$150,000 or more	2%	5%	\$475,000+	0%	0%	0%

Source: CSU Chancellor's Office Housing Survey, February 2001

BAE, 2001; First American Real Estate Solutions (FARES), June of 2001

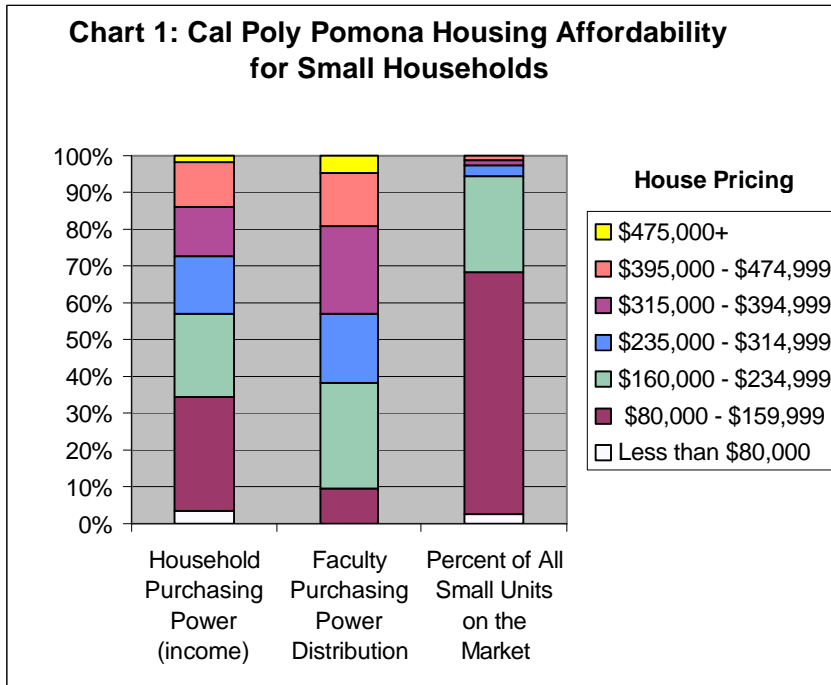
*Small units have two or fewer bedrooms

⁵ Sale data for the commute shed from April to June of 2001, as provided by First American Real Estate Solutions (FARES), a subscription service that publishes all recorded property sales per county assessor records.

⁶ In order to determine if there is sufficient supply of housing at a given affordability level, the tables allocate housing units based on the price that is affordable to the income category in the same row. For example, the 45 percent of employees who earn between \$25,000 and \$49,999 can afford to purchase homes in the \$80,000 - \$159,000 price range. For detail on how to read these tables, and additional information on housing mix and affordability see Appendix E.

⁷ Please see appendix E to review the number of housing units that sold in each price category.

Chart 1 illustrates the data in Table 8 in graph form.



The above chart is characteristic of a housing market which prospective buyers would characterize as having "Moderate Affordability." For comparison purposes, the income/housing cost profiles of other campus markets that could be characterized as having "High Affordability," "Moderate Affordability," "Marginal Affordability," and "Very Low Affordability" are displayed in Appendix F, along with a discussion of how to use and interpret these charts.

Larger Households

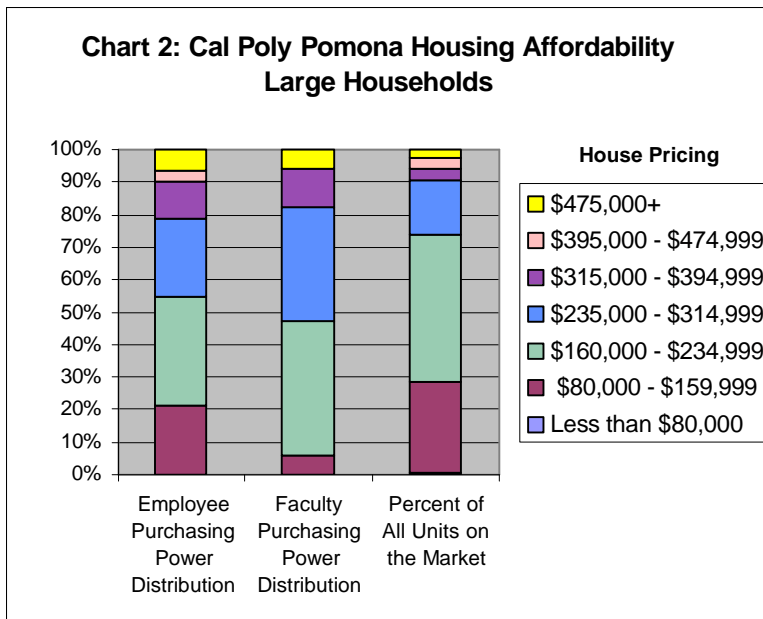
The results for larger households (three or more persons) echo those for smaller households. For the most part, survey respondents with three or more persons can also afford homes within the primary commute-shed. Chart 9 shows that the 21 percent of Cal Poly Pomona employee households with incomes of less than \$50,000 can afford to purchase 29 percent of the all large housing options, including 71 percent of appropriately-sized condominiums and 18 percent of the single-family homes. Again, faculty generally have more purchasing power than Cal Poly employees overall, further improving faculty housing options.

Table 9: Cal State Pomona Housing Affordability for Large Households (3+ people)

Income Range	Employee Income Distribution	Faculty Income Distribution	Affordable House price	Percent of Large* Single Family Homes on the Market (2+ bedrooms)	Percent of Large Condos on the Market (2+ bedrooms)	Percent of All Large Units on the Market
Less than \$24,999	0%	0%	Less than \$80,000	0%	1%	1%
\$25,000 - 49,999	21%	6%	\$80,000 - \$159,999	18%	70%	28%
\$50,000 - 74,999	34%	41%	\$160,000 - \$234,999	47%	25%	43%
\$75,000 - 99,999	24%	35%	\$235,000 - \$314,999	20%	3%	17%
\$100,000 - 124,999	11%	12%	\$315,000 - \$394,999	7%	0%	6%
\$125,000 - \$149,999	3%	0%	\$395,000 - \$474,999	4%	0%	4%
\$150,000 or more	6%	6%	\$475,000	3%	0%	3%

Source: CSU Chancellor's Office Housing Survey, February 2001
 BAE, 2001; First American Real Estate Solutions (FARES), June of 2001
 *Large units have two or more bedrooms

This information is also displayed graphically in Chart 2.



In summary, for-sale housing stock within the primary commute is affordable to most Cal Poly Pomona employees. Three additional notes relating to this general finding are required: first, some of the more affordable data points captured by FARES (First American Real Estate Solution) may be in neighborhoods considered undesirable by employees of the University; secondly, some employees at the bottom of each household income range may struggle more with affordability than is reflected in this report because the available household income data was collected using relatively broad income ranges; finally, actual condo affordability is slightly less relative to incomes than reported due to the payment of homeowners association fees which are not included in these estimates.

Customized Market Gap Analysis

At the request of Cal Poly Pomona, BAE completed a second analysis of the FARES data which limited the analysis to cities in the Cal Poly Pomona commute shed in which a significant percentage of faculty currently live. In this second analysis, BAE limited the FARES data to the cities of Chino,⁸ Covina, Claremont, Diamond Bar, Pomona, San Dimas, Upland, and West Covina. These cities are more likely to be considered “desirable” by Cal Poly Pomona faculty, since a significant percentage of faculty live in them. This customized analysis found higher affordability for small households and less housing affordability for larger Cal Poly Pomona faculty households.

For small households, Table 8b, below indicates that both condominiums and small single family homes are more affordable to faculty and employees. Overall affordability of all units is also higher in this second analysis for small households.

Table 8b: Cal State Pomona Housing Affordability for Small Households (1-2 people)

Income Range	Employee Household Income Distribution	Faculty Household Income Distribution	Affordable Home Price	Percent of Small Single Family Homes on the Market (1-2 bedrooms)	Percent of Small Condos on the Market (1-2 bedrooms)	Percent of All Small Units on the Market
Less than \$24,999	3%	0%	Less than \$80,000	0%	0%	0%
\$25,000 - 49,999	31%	10%	\$80,000 - \$159,999	100%	76%	84%
\$50,000 - 74,999	22%	29%	\$160,000 - \$234,999	0%	19%	13%
\$75,000 - 99,999	16%	19%	\$235,000 - \$314,999	0%	5%	3%
\$100,000 - 124,999	14%	24%	\$315,000 - \$394,999	0%	0%	0%
\$125,000 - \$149,999	12%	14%	\$395,000 - \$474,999	0%	0%	0%
\$150,000 or more	2%	5%	\$475,000+	0%	0%	0%

Chancellor's Office Housing Survey, 2001; First American Real Estate Solutions, 2001; BAE, 2001

However, for large households, Table 9B indicates a more complicated situation. In this second analysis there are more affordable single-family homes and fewer affordable condominiums to households earning less than \$50,000. For households in the next income category (earning between \$50,000 and \$75,000) there is a significant shortage of affordable single family homes: only 17 percent are priced between \$160,000 and \$234,999, while 41 percent of faculty households earn sufficient income to afford these units. These same households can clearly afford to purchase the 26 percent of single family homes that sold for between \$80,000 and \$160,000, so there are additional housing options though probably less desirable ones to this population.

Table 9B: Cal State Pomona Housing Affordability for Large Households (3+ people)

Income Range	Employee Household Income Distribution	Faculty Household Income Distribution	Affordable House price	Percent of Large* Single Family Homes on the Market (2+ bedrooms)	Percent of Large Condos on the Market (2+ bedrooms)	Percent of All Large Units on the Market
Less than \$24,999	0%	0%	Less than \$80,000	0%	0%	0%
\$25,000 - 49,999	21%	6%	\$80,000 - \$159,999	26%	46%	30%
\$50,000 - 74,999	34%	41%	\$160,000 - \$234,999	17%	46%	22%
\$75,000 - 99,999	24%	35%	\$235,000 - \$314,999	29%	9%	26%
\$100,000 - 124,999	11%	12%	\$315,000 - \$394,999	13%	0%	11%
\$125,000 - \$149,999	3%	0%	\$395,000 - \$474,999	8%	0%	7%
\$150,000 or more	6%	6%	\$475,000	6%	0%	5%

Source: CSU Chancellor's Office Housing Survey, February 2001
BAE, 2001; First American Real Estate Solutions (FARES), June of 2001

*Large units have two or more bedrooms

⁸ The percent of faculty living in Chino is 3.9 percent, Covina (1.2 percent) Claremont (19 percent), Diamond Bar (4.5 percent), Pomona (5 percent), San Dimas (2.2 percent), Upland (6.8 percent), and West Covina (2 percent).

Rental Housing

The rental housing market surrounding CSU Pomona is also relatively affordable to CSU survey respondents. BAE assumed that an “affordable rent” is 30 percent or less of a household’s monthly income. Thus, a household earning between \$50,000 and \$74,999 a year can afford to spend between \$1,250 and \$1,875 per month on rent.

BAE used RealFacts, a subscription service that tracks rental housing data at larger multifamily unit complexes, to assess rental rates in Pomona, Covina, West Covina, Walnut, San Dimas, and Ontario. The average rent for one and two bedroom apartments in this region was under \$900 per month for the second quarter of 2001. Seventy percent of all small households and 90 percent of small faculty households earn sufficient income (from \$50,000 to \$74,999) to afford these rental rates.

Table 10: Cal Poly Pomona Rental Affordability for Small Households (1-2 people)

Unit Type	Number of Units	Percent of Units	Average Rent
1 bedroom	2,659	35%	\$785
2 bedroom	4,952	65%	\$850
All Small Units	7,611	100%	\$930

Source: BAE, 2001; Real Facts, 2001

For apartments with two or more bedrooms, the average rent was approximately \$1,020 per month. Eighty percent of Cal Poly Pomona’s three plus person households and 94 percent of larger faculty households earn sufficient income (from \$50,000 to \$74,999) to afford these rental rates.

Table 11: Cal Poly Pomona Rental Affordability for Large Households (3+ people)

Unit Type	Number of Units	Percent of Units	Average Rent
2 bedroom	4,952	89%	\$850
3+ bedroom	591	11%	\$1,121
All Large Units	5,543	100%	\$1,020

Source: BAE, 2001; Real Facts, 2001

According to the Department of Housing and Urban Development (HUD), Los Angeles County had a balanced overall rental market in the first quarter of 2001, with a vacancy rate of approximately five percent. The overall vacancy rate in San Bernardino County (part of which is in the primary commute-shed) in the last quarter of 2000 was eight percent, the highest rate in Southern California. However, newer and larger multifamily complexes (100 units or more) were reporting vacancy rates of four percent or less.

Conclusions

Cal Poly Pomona is facing challenges related to successful recruitment and retention of faculty and hard-to-hire staff. This finding is supported by administrators, search committee chairs, recent hires and declines. The market gap analysis, however, indicated a range of for-sale and rental housing supply within the commute-shed for this campus that appeared to be affordable to most Cal Poly Pomona employee households. As noted earlier, however, the original market gap analysis did not attempt to assess the desirability of neighborhoods, just their affordability. It should also be noted however, that Cal Poly Pomona's employees overwhelmingly live in two-income households. Without two incomes, seventy percent of larger homes would be unaffordable to most recently-hired faculty. Furthermore, the customized market gap analysis which included an evaluation of neighborhood quality, found more of an affordability gap, especially for larger households earning less than \$75,000.

Based on key informant interviews and focus group participants, suggestions from the campus representatives for a housing assistance strategy include the following:⁹

- ✍ Cal Poly Pomona should develop a standard package of detailed housing information for all faculty and hard-to-hire staff candidates. Currently, information is provided by individual departments, which results in duplicated efforts and a wide variety of information quality depending on the department and its resources. Recommended housing information should include a list of recommended real estate agents, and map information that graphically displays current faculty neighborhoods, school scores, crime statistics, average housing cost, and commute time to the Cal Poly Pomona Campus.
- ✍ Cal Poly Pomona should explore the possibility of providing temporary housing for incoming faculty at University Village or some other equivalent apartment complex. This would give new hires an opportunity to develop a sense of community within the campus, focus on their teaching load in the first six-months to a year and learn more about the local housing market.

Moreover, although unrelated to housing directly, administrators noted that:

- ✍ Cal Poly Pomona's various departments and the University as a whole should review their employee recruitment processes to reduce any burdensome paperwork requirements they make of potential candidates. Such a review could well increase the size and quality of applicant pools.

⁹ Note: These suggestions represent the views and opinions from the interviews and focus group participants, and do not necessarily represent BAE's opinion regarding most cost-effective housing assistance strategies. Upon request, BAE can provide a more thorough assessment of model housing assistance strategies, their costs and benefits, and recommendations related to the CSU System. However, those advisory services are beyond the scope of BAE's contract and direction from CSU Chancellor's Office.

Appendix A: Key Informant Guide & Departments Represented

Departments Represented

Accounting (2)
College of Business
Electrical and Computer Engineering (2)
Computer & Information Systems
Computer Science
Economics
Geography
Music

Key Informant Interview Guide Deans and Search Committee Chairs

1. Tell me briefly about your position and how you are involved in recruitment efforts.
2. What are the key factors that positively and negatively influence your ability to attract new faculty? How about hard-to-hire staff?
3. Tell me about a recent recruitment process that was successful/unsuccessful. Why was it successful/unsuccessful? Why was CSU chosen/not chosen by the candidate?
4. What could be done to improve the success of your recruitment efforts (at the department, campus, and system levels)?
5. What percent of the time do you get first or second choice in your recruitment efforts? How often are you unable to fill a position, because you cannot find a qualified candidate vs. when you can find but cannot hire a qualified candidate?
6. Which universities/colleges/employers are you competing against to attract new hire faculty? What about hard-to-hire staff?
7. For faculty and hard-to-hire staff that choose competitors, why do they choose those competitors?
8. Do you have a sense that potentially qualified candidates do not apply to the CSU specifically because of (or the perception of) the cost or unavailability of housing? If so, describe. How big an issue do you think this is?

Housing Questions

9. Do recruitment candidates ask about housing?
10. Is housing a factor in your recruitment efforts? How important is it?
11. Can you give some examples of how it impacted your recruitment efforts for faculty? What about for hard-to-hire staff?
12. What are the three most important housing issues for new hires/recruits?
13. What programs could CSU put in place to address these housing issues?
14. Do you have any housing assistance programs now? For example do you provide any special materials to candidates to address housing issues?

Retention Questions

15. Is retention of faculty, hard-to-hire staff, new hires an issue?
16. What is your employee turnover rate for faculty? Hard-to-hire staff? New hires?
17. What are the key factors effecting retention of faculty, hard-to-hire staff, new hires?
18. Do housing issues effect retention? Which ones?
19. Do you think that faculty/hard-to-hire staff have left CSU because of housing issues?
20. Is there something that we should have asked you about but didn't?
21. Do you have any last comments/recommendations/questions?

Appendix B: Focus Group Guide and Departments Represented

Faculty:

Architecture
Behavioral Sciences
Biological Sciences (3)
Business and Marketing
CEIS
Chemical & Materials Engineering
Collins School
Computer Science
Department of Education
English & Foreign Languages
Geography and Anthropology
Kinesiology & Health Promotion (2)
Mathematics
Mechanical Engineering
Music
Technology & Operations Management
University Writing Center

Focus Group Questions: CSU Faculty and Hard-to-hire staff

Recruitment Questions

1. Briefly discuss your recruitment experience when you came here to the university. Pick one thing that was good about the experience and one thing that could have worked better about the recruitment process itself.
2. What could your department or this university do to make recruitment efforts more successful? What could the Chancellor's Office do?
3. Why did you chose to come to CSU? What factors influenced you the most in your decision?

Housing Questions

4. Were you adequately informed regarding housing issues when you decided to accept the position? How did you obtain the information you did have?
5. Was housing an important factor when you choose to come to CSU? Why or why not? How did it impact your decision to join CSU, if at all?
6. For renters, tell us about your housing search when you came to this area. Easy? Hard? Now for home owners, tell us about your housing search when you came to this area?
7. What are your main housing concerns?
8. What could the University do to help address these issues?
9. Of the solutions we just outlined, which ones would have been most helpful when you first came to CSU?

Retention

10. What factors would or have influenced you to considered leaving the university?
11. For faculty or hard-to-hire staff who have left the university, do you know why they left?
12. Is there anything that we missed? Is there anything that you came wanting to say that you didn't get a chance to say?

Appendix C: Faculty and Staff Confidential Survey

Your individual data will be held completely confidential. Summary data will be incorporated into campus level and CSU wide reports on recruitment, retention and housing.

1. Since coming to CSU, have you considered leaving the university? ___yes ___no
Why or why not?

2. How many offers did you receive during your job search?
_____ Total number of offers (including CSU)

Please complete the form below which compares CSU's offer with that of your other top choice. Please indicate the name of your other top offer employer (whether or not it was by an educational institution or other employer). If you did not receive an offer from any employer besides CSU, please leave the second column blank.

	CSU Campus: (location) _____	Other top offer (name of employer): _____	Check top 3 influences of decision
1. Job Title			
2. Annual Salary	\$ _____	\$ _____	
3. Retirement/health benefits	high average low	high average low	
4. Please describe other benefits: (e.g. bonus, housing, relocation costs, research stipend, etc.) and dollar value of benefit.	Benefit type: Dollar value: \$ _____ Benefit type: Dollar value: \$ _____	Benefit type: Dollar value: \$ _____ Benefit type: Dollar value: \$ _____	
5. Work Load (4/4 or 2/2) (Please describe)			
6. Which job has the better fit/satisfaction? Check one			
7. Which employer provides better research opportunities/support?			
8. Which employer has a better reputation?			
9. Which location offers a higher quality of life?			
10. Do you have personal connections to the area? (Please describe)			
11. Was spouse job options a consideration? (please describe)			
12. Cost of living	high average low	high average low	
13. Other _____			

Appendix D: Declinee Interview Form and Confidential Survey

Interview Questions

1. Briefly discuss your recruitment experience when you came to the CSU campus. What was good about the experience? What was bad about it?
2. Why did you choose not to come to CSU? What three factors influenced you the most in your decision?
3. Was housing cost or availability an important factor? Why or why not? How did it impact your decision not to join CSU, if at all?
4. Could the University have done something to help address these issues during the recruitment process and thereby could they have changed your decision? What could the university have done?
5. How would you compare your CSU offer with the offer you accepted?

	CSU Campus:	Other top offer (name of employer): _____	Top 3 influences
1. Job Title			
2. Annual Salary	\$	\$	
3. Work Load (4/4 or 2/2) (Please describe)			
4. Which job has the better fit/satisfaction? Check one			
5. Which employer provides better research opportunities/support?			
6. Which employer has a better reputation?			
7. Which location offers a higher quality of life?			
8. Do you have personal connections to the area? (Please describe)			
9. Was spouse job options a consideration? (please describe)			
10. Cost of living	high average low	high average low	
11. Other _____ _____			

6. Would you consider CSU in the future?
7. Is there anything that we missed? Is there anything that you want to say about the CSU recruitment process that you didn't get a chance to say?

Appendix E: Housing Data Detail

Table 12: Condominium Sales Around CSU Pomona, April to June 2001

	<u>ALL UNITS</u>	<u>ALL UNITS</u>	<u>ONE BEDROOM</u>	<u>TWO BEDROOM</u>	<u>THREE BEDROOM</u>	<u>FOUR+ BEDROOM</u>
	<u>Number of Units</u>	<u>% of Total</u>	<u>Number of Units</u>	<u>Number of Units</u>	<u>Number of Units</u>	<u>Number of Units</u>
Less Than \$80,000	1	1.5%		1		
\$80,000 to \$159,999	46	70.8%		33	13	
\$160,000 to \$234,999	16	24.6%			16	
\$235,000 to \$314,999	2	3.1%			2	
\$315,000 to \$394,999	0	0.0%				
\$395,000 to \$474,999	0	0.0%				
\$475,000 and above	0	0.0%				
Total (a)	65	100.0%	0	34	31	0
Median Sale Price	\$135,000		NA	\$125,000	\$150,000	NA
Average Sale Price	\$141,498		NA	\$129,300	\$154,839	NA
Avg. Square Feet	1,226		NA	1,057	1,411	NA
Avg. Price per SF	\$115		NA	\$122	\$110	NA

Notes: (a) Represents all full and verified condominium sales in a 10 mile radius around CSU Pomona from April 2001 to June 2001.

Source: First American Real Estate Solutions; BAE, 2001.

Table 13: Single-Family Residence Sales Around CSU Pomona, April to June 2001

	<u>ALL UNITS</u>	<u>ALL UNITS</u>	<u>ONE BEDROOM</u>	<u>TWO BEDROOM</u>	<u>THREE BEDROOM</u>	<u>FOUR+ BEDROOM</u>
	<u>Number of Units</u>	<u>% of Total</u>	<u>Number of Units</u>	<u>Number of Units</u>	<u>Number of Units</u>	<u>Number of Units</u>
Less Than \$80,000	2	0.6%	1	1		
\$80,000 to \$159,999	61	19.6%	1	34	19	7
\$160,000 to \$234,999	154	49.4%		15	124	15
\$235,000 to \$314,999	59	18.9%		0	0	59
\$315,000 to \$394,999	14	4.5%		0	0	14
\$395,000 to \$474,999	12	3.8%		0	0	12
\$475,000 and above	10	3.2%			0	10
Total (a)	312	100.0%	2	50	143	117
Median Sale Price	\$201,000		\$100,000	\$160,000	\$188,000	\$248,000
Average Sale Price	\$232,464		\$105,000	\$173,506	\$204,090	\$286,521
Avg. Square Feet	1,580		489	1,113	1,365	1,997
Avg. Price per SF	\$147		\$215	\$156	\$150	\$143

Notes: (a) Represents all full and verified SFR sales in a 10 mile radius around CSU Pomona from April 2001 to June 2001.

Source: First American Real Estate Solutions; BAE, 2001.

Appendix F: Sample Housing Affordability Charts

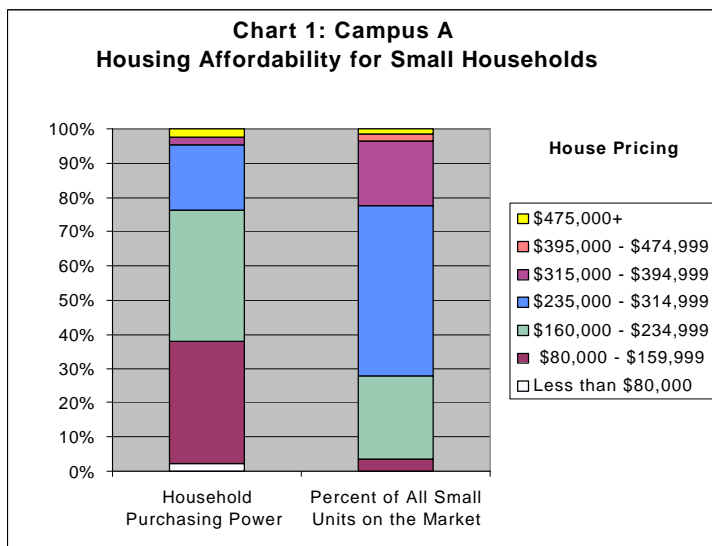
For comparison purposes, the following charts provide a comparison of housing markets of “Very Low Affordability,” “Marginal Affordability,” “Moderate Affordability,” and “High Affordability.”

When reading the charts, the “Purchasing Power” bar describes the percent of households that can purchase a home at each price range. Purchasing power is a direct function of household income. The bar on the right describes the distribution of actual home prices in the campus commute-shed.

To use these charts, first select a housing price range of interest, for example, the third category from the bottom in the housing prices legend shows houses priced between \$160,000 and \$234,999. Then, by looking at the bar on the right, note that 28% of the houses in the market are priced within or below this price range. Next, find the corresponding shaded area on the bar showing household purchasing power. In Chart 1, the third shaded band from the bottom, which extends from approximately 38% to approximately 75%. The difference between these two numbers, i.e., 37%, provides the percentage of households with gross incomes capable of purchasing homes in the price range from \$160,000 to \$234,999. These households could, therefore, also afford all houses less than \$160,000. Therefore, 37% of households have incomes that would allow them to purchase only 28% of the housing units in the market suitable for their needs.

In a “Very Low Affordability” market like that shown in Chart 1, the percentage of low-income households exceeds the percentage of low-priced homes. In Chart 1, the approximately 36 percent of households have incomes that would allow them to purchase a house priced between \$80,000 and \$159,999 and in this market, only four percent of homes are priced less than \$160,000. In markets with “very low affordability,” a significant percentage of households will be unable to purchase housing.

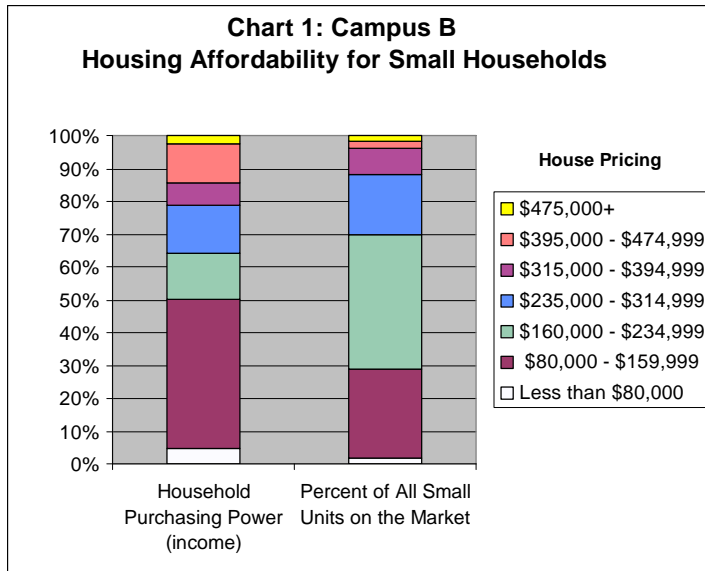
Market Characterization: “Very Low Affordability”



In a “Marginally Affordable” market the percent of households at the lower levels of purchasing power exceeds the proportion of available housing that is affordable. Markets

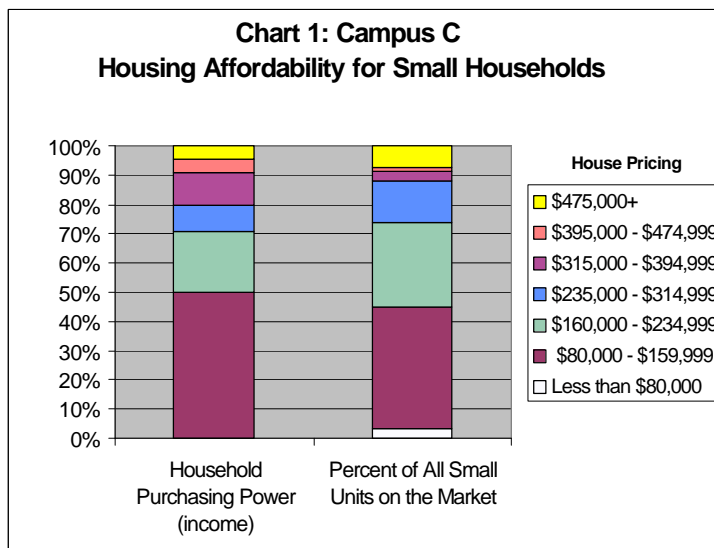
with marginal affordability offer few affordable housing options for those at the bottom half of the income distribution.

Market Characterization: “Marginal Affordability”



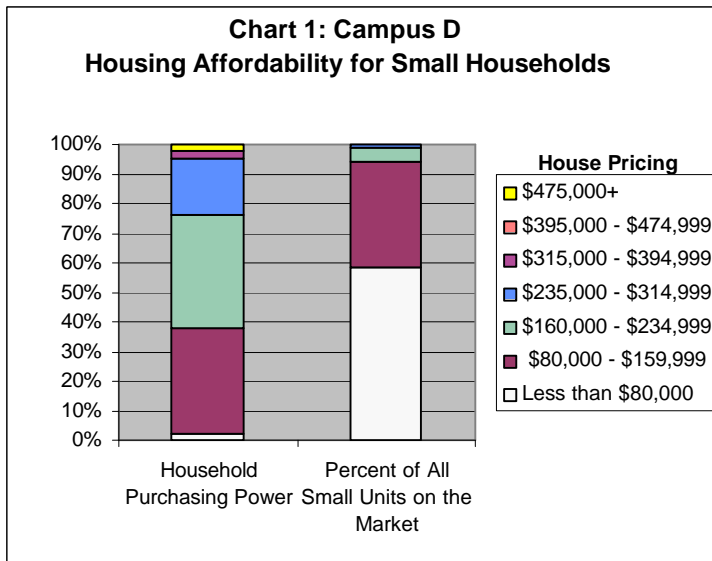
In a “Moderate Affordability” market, the distribution of households and home prices are largely similar at every level of affordability, indicating that a sufficient supply of affordable homes are available at each income range.

Market Characterization: “Moderate Affordability”



In a “High Affordability” market, the percentage of low-priced homes exceeds the percentage of low-income households. These markets provide households with many housing options from which they can choose an affordable home.

Market Characterization: “High Affordability”



Sources: First American Real Estate Solutions, 2001; February 2001 Housing Survey, CSU Chancellor’s Office; Bay Area Economics, 2001.