COMMUNITY ASSESSMENT

EXECUTIVE SUMMARY

Prepared by: MIG
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ACKNOWLEDGMENTS

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The Parasol Tahoe Community Foundation (Parasol) is a non-profit organization focused on cultivating community philanthropy to enhance and preserve the quality of life at Tahoe. By creating a perpetual source of community capital, Parasol is able to support a broad range of charitable organizations.

As the oldest and largest community foundation serving the Tahoe region, Parasol’s highest goal is to benefit Lake Tahoe residents and communities, strengthening the place they call home both today and for future generations. Through the generosity of its donors, Parasol has granted over $66.5 million to charitable causes since its inception. All discretionary funding is invested locally.

Since its inception in 1996, Parasol has focused on several timely initiatives to benefit the community, beginning with volunteerism through Parasol’s AmeriCorps program, that ran from 1997 through 2015. This grant program provided 230 AmeriCorps member volunteers serving at 23 non-profit organizations. The Parasol AmeriCorps volunteers provided direct services including, educating local children, feeding the hungry, and protecting the environment.

Parasol has focused on non-profit collaboration throughout its existence. To support non-profits working together in the community, Parasol opened the Donald W. Reynolds Community Non-Profit Center (DWR Center) in 2002. The DWR Center provides offices for non-profits with a variety of missions, as well as storage space and meeting rooms for local non-profits serving Incline Village, Crystal Bay and Kings Beach. This innovative grant program has provided more than $10.5 million of operational in-kind grant support and continues to offer non-profits abundant opportunities for collaboration.

Parasol envisions a thriving community created through meaningful philanthropy, inclusive communication, and the willingness to explore possibilities together. Parasol currently focuses its community efforts in six program areas, including:

- A. Basic Needs
- B. Education and Youth Development
- C. Health and Well-Being
- D. Environment
- E. Arts, Culture and Heritage
- F. Community and Civic Engagement
Purpose of this Document

In the spring of 2018, Parasol’s Board of Directors initiated a comprehensive community assessment in partnership with MIG, Inc. (MIG), to support and inform the development of an updated Strategic Plan. The Strategic Plan will define the future direction and priorities of the Community Foundation and will be used to guide thoughtful decision making, leading to even greater positive impacts.

This assessment is interested in examining the priority issues, needs and challenges in the Tahoe Region today, and how these priorities may affect the future of the Tahoe Region.

By evaluating existing community needs, priorities, services, service gaps and opportunities, the Community Assessment will ensure that the Strategic Plan is responsive to the current needs and priorities of community members and stakeholders. The document may be useful to others in the Tahoe Region, providing a snapshot of conditions, needs and priorities that are important to the community.

Methodology

This Community Assessment incorporates both primary and secondary forms of research.

In addition to collecting and analyzing secondary data sources, MIG conducted five primary research activities that surveyed and interviewed Parasol donors, key partners, community leaders and the general public. These included an Online Donor Survey, a Donor Focus Group, Interviews of Community Influencers, a Community Survey and a Service Network Mapping Analysis. Each activity collected input on significant opportunities related to the Community Foundation’s community impact grantmaking strategy, such as current community needs, community members’ prioritization of program areas, and the existing network of service providers.

Parasol staff oversaw two additional primary research activities, including a second community survey, and in-person interviews with its grantees, conducted by a third-party. Unlike the Community Survey conducted by MIG and EMC Research (EMC), which was targeted to mailing addresses in jurisdictions along the Nevada side of the lake, Parasol’s survey was open to the public. While this survey is not statistically representative, Parasol was adamant about allowing every stakeholder the opportunity to provide input.

The Online Donor Survey collected input from Parasol donors on current and future community needs in August 2018 via SurveyMonkey. To delve further into the donor perspective, MIG convened a focus group of current and local donors in September 2018. This 90-minute conversation yielded more detailed information about the perceptions of community issues and needs in the Tahoe Nevada area, as well as the potential role Parasol might play in addressing these. Next, Parasol identified a set of local “influencers” – members of the community that have been active in various realms of service and leadership – to be interviewed for their opinions. These “influencer interviews” revealed and reinforced a number of the challenges currently facing the Tahoe region, as well as opportunities for greater community
engagement around these issues.

These inputs were supplemented by a broader reach into community opinion that was garnered in a community-wide survey, administered by EMC Research in September-October 2018. The survey, designed to be statistically valid, was sent to 8,000 residents, randomly selected from a merged list of mail addresses and County Assessors’ lists within the target area. Participants were asked to identify local needs and priorities based on parameters determined through the Online Donor Survey, Donor Focus Group and Influencer Interviews. The survey further collected input on the public’s general awareness and perceptions of the Community Foundation and its partners. The EMC team collected 425 responses.

The Service Network Mapping Analysis was launched in September 2018, utilizing Kumu, an online data visualization platform. The activity asked participants to enter basic information about their respective organizations. The purpose of the Network Mapping Analysis is to understand and assess the network of existing service providers to reveal service gaps and inform future grantmaking and collaboration opportunities. The analysis further helped to identify community needs and priorities. Parasol and MIG identified and invited local service providers to participate, including nonprofits, government agencies, schools, civic and business leagues, the four community foundations in the region, and veterans’ organizations. This process provided Parasol with a robust data set to share with the community.

The Assessment’s secondary research largely relies upon U.S. Census data collected through the American Community Survey program. Other databases and community reports supplement census data as needed. These reports include the 2009 Douglas County, Nevada Community Assessment, the 2012 Incline Village/Crystal Bay, Nevada Community Assessment, Barton Health’s 2018 Community Health Needs Assessment, the 2018 Tahoe Forest Health System Community Health Needs Assessment, Tahoe Prosperity Center’s 2018 Measuring for Prosperity report, UC Davis’ Tahoe: State of the Lake Report 2018 and the Nevada Department of Education Public Accountability Portal, among others. The secondary data sources provide a snapshot of the demographic characteristics and trends that influence community needs and preferences.

Translating Data into Grantmaking Strategy
The Community Assessment as a whole, and to some extent the demographic profile, is intended to illuminate the context for the Parasol Tahoe Community Foundation’s commitment to support the local community in strategic, targeted and impactful ways. The data suggests needs that were then verified and prioritized through the donor and community surveys. Combined with all planning activities, the data may be used by Parasol to help direct its community impact partnership and grantmaking strategies that will result in positive changes in the Tahoe Nevada area.

Data can be limited by inconsistencies in geographic units and years collected, however, trends and patterns are evident and useful. Some indicators on their own are not significant, but combined with other indicators, tell a story about what is happening in the
community. For example, looking at education indicators in combination with economic indicators can describe what is happening in the workforce but also with school quality; looking at housing indicators in combination with economic security indicators can describe what is happening to housing accessibility and the quality of jobs. Data needs to be read in “herds” to tell a story.

As noted, the community profile is one chapter in the Community Needs Assessment. Each Indicator includes graphic visualization of trends and a summary of notable trends or patterns. More in-depth analysis was conducted using these visuals in conjunction with other elements of the Assessment, such as the community survey results. This yields valuable information to inform Parasol’s decision-making strategy and deliver better impact from targeting resources.

**Community Profile**

The Community Profile (Chapter 3) presents data to define and understand the population characteristics of Parasol’s primary service area. While Parasol awards grants to organizations throughout the Lake Tahoe Region, this Community Assessment is limited to Parasol’s primary service area, which consists of the Nevada portion of the Lake Tahoe Basin (Tahoe Nevada). This assessment evaluates the current conditions within the six ZIP Codes situated along the northeastern, eastern and southeastern shores of Lake Tahoe (named as follows for the purposes of this assessment), including Crystal Bay (89402), Glenbrook (89413), Zephyr Cove (89448), Stateline (89449), Incline Village A (89450) and Incline Village B (89451). There are two ZIP codes associated with Incline Village: 89450 represents a set of residents with post office boxes; 89451 is the remainder of residents in the town. Data is presented separately because the datasets are reported separately in the Census/American Community Survey. Methodological standards call for consistent units of analysis, which is why the two Incline Village ZIP codes cannot be aggregated. Crystal Bay (89402), Incline Village A (89450) and Incline Village B (89451) are located in Washoe County, Nevada. Glenbrook (89413), Zephyr Cove (89448) and Stateline (89449) are located in Douglas County, Nevada.

**A. Combined Geography**

In 2017, the total population for Tahoe Nevada was 14,155. Ninety-one percent (91%) of Tahoe Nevada residents lived in or had mailing addresses in the places of Crystal Bay, Glenbrook, Incline Village, Kingsbury, Stateline and Zephyr Cove at this time. In 2017, the majority of the population identified as white non-Hispanic (86%) or Hispanic or Latino (17%). The population is older relative to Nevada residents overall, with 45% of the total population aged 55 years and older. The six ZIP codes are also more affluent relative to Nevada residents. However, evaluating the six ZIP codes as a whole masks the extreme differences between individual ZIP codes and communities. For example, in 2017, Incline Village A (89450) had a Median Household Income (MHI) of $135,469, whereas Stateline (89449) had an MHI of $53,846.

**B. Crystal Bay (89402)**

Crystal Bay (89402) is a small, affluent community comprised of white, non-Hispanic adults 55 years and older. In 2017, Crystal Bay (89402) had 15 residents. At this time, every household had an annual income of $200,000 or more and every occupied housing unit was owner-occupied.
C. Glenbrook (89413)
Glenbrook (89413) is an older, more affluent and more highly educated community relative to Nevada overall. In 2017, Glenbrook (89413) had a population of 599. Sixty-six percent (66%) of residents were adults 55 years and older and 85% of residents identified as white at this time. Five percent (5%) of residents identified as Hispanic or Latino and 11% of residents identified as Asian. Along with Incline Village B (89451), Glenbrook (89413) has the second-highest proportion of limited English-speaking households, at 4%. Glenbrook had an MHI of $91,442 at this time. Sixty-three percent (63%) of residents 25 years and older held undergraduate, graduate or professional degrees.

D. Zephyr Cove (89448)
In 2017, the ZIP code of Zephyr Cove (89448) was the third most populous in Tahoe Nevada, with 1,371 residents. Ninety-seven percent (97%) of residents identified as white and 57% of residents held bachelor’s, graduate or professional degrees at this time. In 2017, Zephyr Cove (89448) had the second lowest MHI, at $75,833, despite 19% of its households having earned $200,000 or more that year. Fifty-four percent (54%) of Zephyr Cove (89448) households were rent burdened or severely rent burdened in 2017.

E. Stateline (89449)
With the lowest proportion of white non-Hispanic residents and the lowest MHI, Stateline (89449) has a distinct community profile among the six Tahoe Nevada ZIP codes. In 2017, Stateline (89449) had 3,284 residents, making it the second most populous ZIP code in Tahoe Nevada. Twenty percent (21%) of Stateline (89449) residents identify as Hispanic or Latino. The majority of Tahoe Nevada residents who identify as black or African American (78%) live in Stateline (89449). Stateline (89449) is also one of the youngest ZIP codes, with only 42% of its population 55 years and older, and with the greatest proportion of prime working-aged adults, 35 to 54 years (27%). In 2017, Stateline (89449) had the lowest levels of educational attainment, with 35% of its population holding bachelor’s degrees or higher.

F. Incline Village A (89450)
Incline Village A (89450) stands out for having the highest MHI and the highest level of educational attainment. In 2017, Incline Village A (89450) had 91 residents and 100% of its residents identified as white non-Hispanic. Unlike Crystal Bay (89402), however, Incline Village A (89450) includes family households with children 17 years and younger. Every resident 25 years and older has attended at least some college. Thirteen percent (13%) and 74% of residents 25 years and older held bachelor’s degrees and master’s or professional degrees respectively, in 2017. While 18% of occupied housing units are renter-occupied, 0% of households are rent burdened.

G. Incline Village B (89451)
Incline Village B (89451) is the most populous ZIP code in Tahoe Nevada, with 8,795 residents. The population of Incline Village B (89451) is the second most diverse after Stateline (89449), with 19% of residents identifying as Hispanic or Latino in 2017. Incline Village B (89451) has the youngest population, with the greatest proportion of residents 34 years and younger (34%) and the second greatest proportion of working-aged residents 35 to 54 years (25%). In 2017, 55% of Incline Village B (89450) residents held bachelor’s degrees or
higher. The ZIP code’s MHI was $81,585 at this time.

**Parasol Community Assessment Program Areas**

This Assessment is organized around Parasol’s six traditional program areas, including Arts, Culture and Heritage; Basic Needs; Education and Youth Development; Health and Well-Being; the Environment; and Community and Civic Engagement. Parasol has focused on supporting and funding organizations that work in these issue areas since its inception in 1996.

To collect more detailed information about the community’s needs and priorities, the primary research activities inquired about two sub-areas of the environment: animal welfare and recreation. The primary research activities therefore ranked community program area priorities using these eight program areas; these priority rankings are summarized in a matrix at the end of this Executive Summary. Rather than providing an exhaustive evaluation of each of these program areas, chapters 4 through 9 each focus on the specific priority issues within these areas, identified by the community in the primary research activities, and particularly in the Community Survey.

**Key Findings**

The findings below are based on an analysis of the data collected for Tahoe Nevada, as well as results and input from the various primary research activities.

**Community Profile**

- **Shrinking Middle Class** – Between 2012 and 2017, the proportion of low- and middle-income households decreased while the proportion of high-income households increased.

- **Isolation, Separation and Diversity** – The decline in full-time residents perpetuates feelings of isolation and contributes to a lost sense of community. Residents with similar levels of income, educational attainment and racial and ethnic backgrounds are concentrated in individual ZIP codes. Census data indicates that minority populations are concentrated within individual ZIP codes.

- **Aging Population** – The Tahoe Nevada population is aging, and a variety of data indicators suggest that the region may not have the physical or medical infrastructure to adequately support seniors, including: the region’s high proportion of seniors living in non-family households and in family households without children, low proportion of workers with lower levels of education and lack of alternative modes of transportation.
Environment

- **The Five-Year Drought** – The five-year drought negatively impacted lake clarity and forest health.¹
- **Climate Change** – While the Lake Tahoe Basin is already being impacted by climate change, researchers project that temperatures could rise from 7 to 12 degrees Fahrenheit by the end of the 21st century. Extreme climatic and hydraulic events will also become increasingly common.²
- **Fire Prevention and Safety** – Local, state and federal agencies provide construction and maintenance guidelines to developers and homeowners to prepare for wildfires, which require wide-spread participation to maximize effectiveness.

Basic Needs

- **Rent Burden** – The proportion of rent burdened households increased between 2010 and 2017, despite maintaining high median household incomes, low levels of unemployment and high levels of educational attainment.
- **Impacts of a Tourism-Based Economy** – The region’s tourism-driven economy contributes to low wages, high vacancy rates and high rates of non-resident homeowners, thereby contributing to the area’s housing affordability crisis.³ The Tahoe Transportation District reported that recent studies have determined that there are about 50 million vehicle trips into, out of and within the Lake Tahoe Basin annually. Of these trips, about 75% are made by visitors and 25% are made by residents and workforce.
- **Low Rate of Housing Development** – Only 78 housing units (0.6% of 2017 housing stock) were built between 2010 and 2017. The region’s slow rate of development exacerbates the housing affordability crisis.

Community and Civic Engagement

- **Community Engagement and Social Cohesion** – Participants across all primary research activities identified community engagement, communication, and social cohesion as priority issues. The Tahoe Forest Health System (TFHS) also found that residents in its service area reported feeling disconnected from the community.

Impacts of Tourism

- **Vacation Home Rentals and Housing Affordability** – A 2017 study published by the City of South Lake Tahoe found that the city’s housing shortage stemmed from a shortage of units available on the market for long-term occupancy rather than a shortage of units more generally. The profitability of short-term rentals exacerbates the conversion of occupied housing to vacant housing for seasonal and vacation rentals.
- **Transportation Infrastructure** – The Tahoe Regional Planning Agency’s 2017 Regional Transportation Plan finds that visitors are overburdening the region’s transportation system during peak seasons and at heavily visited destinations. The Plan aims to manage congestion by expanding the area’s non-vehicle transportation options, including public transportation and trails for biking and walking.

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² UC Davis Tahoe Environmental Research Center (2018).
Health and Well-Being

- **Environment** – Tahoe Nevada’s high rates of educational attainment and low rates of poverty suggest a social and physical environment more likely to support positive health outcomes.\(^4\)
- **Comparatively Favorable Health Rankings** – Washoe County and Douglas County have favorable health rankings relative to Nevada counties.
- **Mental Health** – The TFHS 2018 Community Health Needs Assessment found that 21% of surveyed residents reported experiencing depressive symptoms in the two weeks prior to the survey, and 34% of residents reported experiencing one or more days of poor mental health in the month prior to the survey.
- **Barriers to Mental Health Care** – The 2018 Barton Health Community Health Needs Assessment found that the Lake Tahoe Basin lacks mental health facilities, including resident mental health facilities. Other obstacles to mental health care include a lack of affordability and county-level budget cuts. Barton Health finds that these obstacles create an inability to provide ongoing mental health care for residents in need.
- **Binge Drinking** – The TFHS found that binge drinking is “prevalent” in its service area; 28% of residents surveyed reported having had a binge drinking episode in the month prior to the survey.
- **Housing Affordability** – The TFHS found that the region’s high housing costs creates stress and impacts residents’ ability to access care.

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Education and Youth Development

- **Public Schools** – There are five public schools located in Tahoe Nevada, three of which are located in Incline Village B (89451) and two of which are located in Zephyr Cove (89448). The two schools located in Zephyr Cove (89448) as well as the High School in Incline Village B (89451) outperform Tahoe Nevada’s two school districts and the state of Nevada more broadly.
- **Private Schools** – Six private nursery schools and preschools and two private schools are located in Tahoe Nevada. Without scholarships or financial aid, many of these schools are unaffordable to the region’s low- and middle-income residents, including hospitality workers.
- **Vocational Training** – Vocational training opportunities are limited for Tahoe Nevada residents.

Arts, Culture and Heritage

- **Cultural Programming and Facilities** – The 2008 *Truckee-North Lake Tahoe Plan for Arts & Culture* evaluated cultural and performance art facilities in Crystal Bay (89402), Incline Village A (89450) and Incline Village B (89451) and found each facility to be of poor or average quality. The quantity and quality of facilities limits programming and the types of performances and events that take place in Crystal Bay (89402), Incline Village A (89450) and Incline Village B (89451).
- **Hispanic and Multi-Cultural Programming** – The 2008 *Truckee-North Lake Tahoe Plan for Arts & Culture* identified a significant unmet need for Hispanic and multi-cultural programming in the Truckee-North Tahoe area, which
includes Crystal Bay (89402), Incline Village A (89450) and Incline Village B (89451).

Summary of Community Priorities
The Community Assessment research is intended to present a set of community priorities that will help the Parasol Tahoe Community Foundation position itself to increase the impacts of charitable giving, form strategic partnerships, and lead on important community issues. When discussing the Tahoe Nevada area – the six ZIP codes comprising the study area – it is important to recognize that the overall population is 14,155 (from the 2017 American Community Survey), a relatively small number, distributed across a set of residential communities spanning the east side of the lake. In addition, the area is a diverse mix of resident types – from full-time, year-round to frequent visitors and second-home owners to vacationers and daytime tourists. The population fluctuates greatly by season, with many attendant variations in the quality and nature of “community.”

As stated earlier, this assessment is interested in examining the priority issues, needs and challenges in the Tahoe Region today, and how these priorities may affect the future of the Tahoe Region.

The Community Survey, sampling opinion from full-time and part-time residents and homeowners on the Nevada side of the Lake Tahoe Basin, was a central piece of the research. Parasol was interested also in potential differences of opinion based on tenure (full-time residents, frequent visitors, and less frequent visitors), on geography, and on household income.

• There is good correlation across methods that Environment, Basic Needs, Health & Well-Being and Education & Youth Development are the areas of overall greatest priority.

• Community residents value the natural environment and have concerns about its health. Strategies to increase lake clarity and the health, safety and sustainability of local forests are widely supported. Protecting wildlife and increasing outdoor activities are also noted as priorities.

• Within Basic Needs, affordable housing is a challenge, with a short supply and increasing costs, especially for lower income renters. Transportation was also a top concern among survey respondents, especially traffic congestion and other issues related to tourism and overcrowding.

• In addition, the data suggest that more attention is needed to health concerns related to mental health, substance abuse, and overall access to health care.

• Improved schools, classrooms and youth programs could increase long term outcomes for the area’s youngest residents.
Conclusion

The information provided shows that the Tahoe Nevada area is experiencing a number of pressures: increasing tourism and restricted development are driving up home rental and ownership costs, which in turn makes it difficult for service workers to live in the area. This impacts businesses of all types, including the hospitality sector and especially small businesses who struggle to attract and retain employees. Tourism is also bringing intense pressure on the transportation system, and the regional agency is looking at ways to ease congestion at peak visitation times through a “transit, trails, and technology” approach to managing the capacity of the area.

The increase in vacation rentals and part-time residents degrade the sense of community cohesion, a top-of-mind issue for many who have lived in the area for a long time. Recent wildfires in and around the Tahoe Basin have elevated the concern for forest health and safety, and there is an ongoing interest in protecting the region’s greatest asset, Lake Tahoe itself. For those who live in the Tahoe Nevada area year-round basic needs and quality of life issues -- such as access to health care, traffic congestion, housing affordability and educational and enrichment opportunities for youth -- are paramount. And finally, the Tahoe Nevada population is aging, and the infrastructure to support the senior population -- including access to health care, in-home support, and transportation -- may not be sufficient to meet their specific needs.

The good news is that there are many organizations – community-based as well as public sector agencies – who are working on all of these critical issues in and around the Tahoe Basin.

Communication, collaboration and coordination among these entities is essential to comprehensive and effective solutions. Since its inception, Parasol Tahoe Community Foundation has always had the big picture of the community in view and helped to enable and support these collective actions.

Under the motto, “Our cause is community,” there are many ways in which Parasol fulfills its mission as a community foundation: Parasol participates as an active partner in cross-sector teams working to meet community needs. It serves as a convener to bring people together to help investigate and discuss solutions to local issues. Parasol leads or champions in specific areas, especially where leadership is lacking. Parasol acts as an educator and mentor to individuals and organizations in areas for which it has specialized knowledge or expertise. In its discretionary grantmaking efforts, Parasol serves as a funder of a strategic set of key initiatives, filling unique funding gaps in the community that no other entity is currently addressing.

This Community Assessment provides information about the Tahoe Nevada region today and the important challenges it faces in preserving its vast natural resources and in sustaining a vibrant quality of life for residents and visitors alike. Parasol has proven in all its efforts to support the community, that it builds on an impressive legacy of effective investment strategy, excellent management, and a core of caring donors who hope to make a lasting difference.