



Workforce Alliance of the North Bay

Labor Market Analysis & Strategy



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About

Lightcast is the world's leading authority on job skills, workforce talent, and labor market dynamics, providing expertise that empowers businesses, education providers, and governments to find the skills and talent they need and enabling workers to unlock new career opportunities. Headquartered in Boston, Massachusetts, and Moscow, Idaho, Lightcast is active in more than 30 countries and has offices in the United Kingdom, Italy, New Zealand, and India. The company is backed by global private equity leader KKR.

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This report is prepared for Workforce Alliance of the North Bay by Lightcast. The content is solely the responsibility of the author and does not necessarily represent the official views of Workforce Alliance of the North Bay. Proper acknowledgement of Lightcast should be included in publications, presentations, or other developed materials.

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Overview





The Workforce Alliance of the North Bay (WANB) retained Lightcast to conduct a custom analysis, providing insights to the state of workforce in the North Bay region, with focused breakouts of each county within the WANB region. This first breakout summary focuses on Napa County. The organization's goal is to understand the North Bay counties' baseline economic conditions, current workforce capacity, job demand, key skills gaps, and the strategic opportunities created by industry shifts, migration trends, and the rise of remote work since the Covid-19 pandemic.

Insights presented in this report will inform local workforce priorities to help align education and skills training investments with emerging industry needs and facilitate the economic mobility of citizens along key career pathways. Which industries drive your local economy, which occupations and skills are most important to those industries, and where might there be gaps between industry needs and the talent development pipeline?

This report provides insights and recommendations to help drive workforce investment priorities and the development of collaborative community partnerships.

A comprehensive talent alignment strategy balances focus on the now, near, and far:

- Matching current workforce with job openings in the near-term;
- Attracting and retaining a skilled talent pool in the region;
- Addressing the unique barriers to labor force participation for different target populations
- Providing visible on-ramps and bridges to high quality career pathways;
- Leveraging and improving the responsiveness of short-term training and workforce development funds to target key skills gaps;

- Aligning post-secondary certificate and degree programs with industry needs;
- Back mapping industry needs into K-16 education; and
- Building the awareness of high-potential career pathways for those currently in the education pipeline or in career transition.

Strategic recommendations are intended to be actionable for a wide range of stakeholders including workforce and economic development organizations, K-12 and higher education systems, community and civic leaders, and policy makers. Advancing community goals will require stakeholders to (1) coordinate and collaborate; (2) follow the lead of employers; and (3) focus on skills.

Economic Overview – Napa County



Key Industries

Napa County’s main industries are diverse, reflecting the nature of the region as well as its workforce. When looking at a 2-digit NAICS breakdown, Napa County’s largest industries are Manufacturing and Accommodation & Food Services, followed by Government.

The table below provides a detailed breakdown of the Top 10 industries at a more granular 3-digit NAICS level, shedding light on their expected growth, average earnings and location quotient¹. Reflecting Napa County’s unique setting, the share of jobs in Beverage Manufacturing is 75.22 times larger than the national average. In addition to this extraordinarily large location quotient (LQ), Beverage Manufacturing provides more employment than the next two largest industries, combined.

With the exception of Local Government, the remaining Top 10 industries are expected to grow or stay level in upcoming years, with the largest (percentage) growth forecasted within the Accommodation and Social Assistance Industries.

¹ Location Quotient quantifies the concentration of a particular industry, occupation or cluster. It can reveal what makes a particular region unique in comparison to the national average.

Industry (3-digit NAICS)	2022 Jobs	2028 Jobs	2022 - 2028 Change	2022 - 2028 % Change	Avg. Earnings	2028 LQ
Beverage (and Tobacco Product) Manufacturing	12,555	13,061	506	4%	\$103,867	75.22
Food Services and Drinking Places	6,929	8,270	1,340	19%	\$46,704	1.30
Local Government	5,840	5,691	-149	-3	\$115,010	0.81
Accommodation	4,022	4,955	932	23%	\$58,316	5.27
State Government	3,980	4,091	110	3%	\$114,537	1.55
Administrative and Support Services	3,435	3,437	2	0%	\$55,664	0.66
Support Activities for Agriculture and Forestry	3,363	4,018	654	19%	\$65,737	13.53
Social Assistance	3,018	3,685	667	22%	\$39,931	1.39
Specialty Trade Contractors	2,896	2,911	16	1%	\$87,991	0.95
Ambulatory Health Care Services	2,859	3,330	471	16%	\$109,792	0.71

In order to better guide training and upskilling efforts and understand the strengths and weaknesses of the region, it is important to not only look at the industries expecting the largest growth, but also at those expecting the largest shed of jobs, as a way of anticipating potential talent pools that will be available in the region.

In Napa County, Food Services and Drinking Places and Accommodation are the industries expecting the highest growth in upcoming years, with a combined total of 2,272 new jobs by 2028. On the other hand, Hospitals, Educational Services and Local Government are forecasted to experience the greatest decreases, with a total of 500 lost jobs. Facilitating the relocation of workers from one industry to another can help promote economic stability and lateral mobility across industries.

Spotlight on Beverage Manufacturing (Winemaking):

It is no surprise that Napa County has an extraordinary concentration of employment and output in the Beverage Manufacturing industry, **with 3% continued growth projected through 2027.**

High average earnings per job within Beverage Manufacturing reflects the industry's diversified staffing pattern - offering jobs across a broad spectrum of functions, education/skills requirements, and salary ranges.

Within the industry, demand for several higher wage professional roles is expected to grow by 2028. Sales Representatives, General Operation Managers and First-

Beverage manufacturing, with a **75.22** location quotient is expected to see 3% growth through 2027.

Line Supervisors of Production and Operating Workers expect a 4% increase in wages, placing their average wages between \$38 and \$49 per hour.

This provides unique opportunities for industry leaders and workforce development partners to build high-mobility career pathways across different occupation subsectors, i.e. production, sales and marketing, business and financial operations, administrative support. More detail on the requirements, average wages and expected growth for Beverage Manufacturing Occupations can be found in Appendix 1.

In contrast, staffing patterns in Food Services & Drinking Places and Accommodation do not show the same breadth of opportunity or wage potential. As an example, First-Line Supervisors of Food Preparation and Serving Workers earn a median hourly wage less than the [MIT living wage](https://livingwage.mit.edu/counties/06055)² for a single adult with no children in Napa County (\$21.62/hr or \$44,970 annually).

According to [Mercer's Inside Employees' Minds 2022 report](https://www.mercer.us/our-thinking/2022-inside-employees-minds-in-the-retail-industry.html)³, retail and hospitality employees are “raising concerns about their long-term financial wellness and are looking for increased support from their employers.” Wage increases seen during and after the Covid-19 pandemic have been diluted by inflation and persistent workforce shortages make it difficult for employers to offer predictable scheduling or flexibility. In order to retain hospitality employees, it will be necessary for employers to keep pace with compensation in adjacent industries and address workplace policies that affect employee engagement.

Occupations and Skills in Demand



² <https://livingwage.mit.edu/counties/06055>

³ <https://www.mercer.us/our-thinking/2022-inside-employees-minds-in-the-retail-industry.html>

Automation Indices for some occupations indicate those jobs have a high risk of displacement as industries automate tasks.

The top three jobs (by volume) in Napa County are Farmworkers & Laborers, Home Health & Personal Care Aides, and Cashiers. Automation Indices above 100 for Farmworkers & Laborers, Cashiers, Waiters & Waitresses, and Fast Food & Counter Workers indicate those jobs have **an above average risk of being displaced as industries automate tasks**. In spite of high automation indices, demand for most frontline roles in Napa County's key industries is projected to grow robustly, likely **exacerbating current worker shortages**.

Eight of the Top 10 occupations in Napa County earn median wages below \$40,000 (and fall below \$30,000 when adjusted for Napa County's cost of living) while Registered Nurses and General & Operations Managers command the highest wages, with yearly wages over \$100k. The table below provides more detail on the Top 10 occupations in Napa County.

Top 10 Occupations - by volume	2022 Jobs	2028 Jobs	2022 - 2028 % Change	2022 Hires	Annual Openings	2028 LQ	Automation Index	Median Annual Earnings
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	3,524	3,896	11%	6,849	656	11.51	113	\$33,187
Home Health and Personal Care Aides	2,602	3,141	21%	1,961	520	1.35	93.6	\$30,243
Cashiers	1,922	1,901	-1%	1,902	362	1.12	105.5	\$33,530
Waiters and Waitresses	1,810	2,118	17%	2,411	450	1.84	129.8	\$33,488
Retail Salespersons	1,554	1,628	5%	1,356	243	0.81	93.4	\$34,653
Registered Nurses	1,528	1,493	-2%	322	86	0.88	85.3	\$134,493
Fast Food and Counter Workers	1,411	1,623	15%	2,045	363	0.89	130.8	\$34,133
General and Operations Managers	1,401	1,536	10%	794	150	0.86	82.2	\$102,419
Demonstrators and Product Promoters	1,264	1,296	3%	1,169	238	53.87	106.9	\$38,230
Maids and Housekeeping Cleaners	1,231	1,436	17%	1,225	219	2.38	124.5	\$34,777

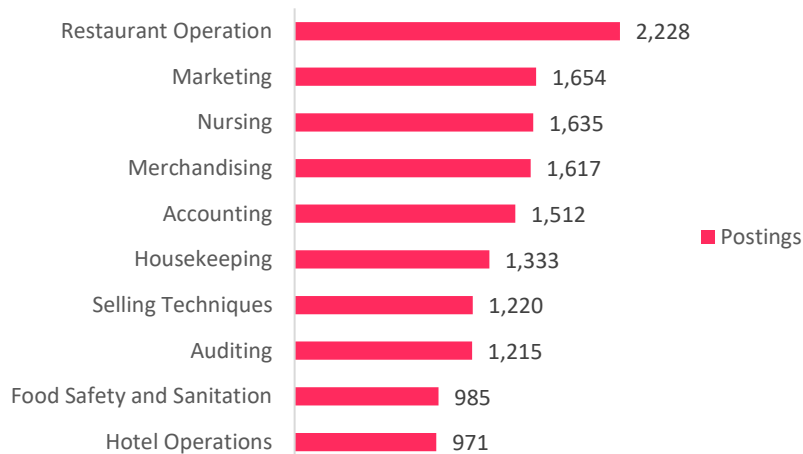
Real-Time Job Demand as Reflected in Job Postings Data

Lightcast supplements traditional survey-based labor market information sources with proprietary real-time job postings data, which provides more timely intelligence on demand for occupations, skills, and levels of education within a selected geography. The forward-looking nature of job postings data captures current and emerging labor market trends, of particular interest for communities working to align education and training programs to rapidly-evolving industry needs.



Napa County had a total of **27,229 unique job postings** during 2022. Monthly postings volume hit a peak in March 2022 with 2,926 postings, then ticked downward to end the year with 1,737 postings in December.

Employers with the largest number of postings in Napa County during 2022 represented Healthcare/Hospital systems, Hotels and Resorts, State Government, and Accounting- Related Services. Job postings demand for accounting services were centered with Moss Adams, a large public accounting firm with a Napa office specializing in services to wineries and vineyards.

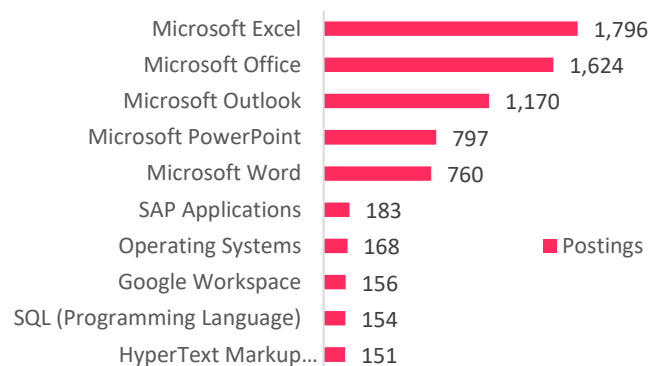


A diverse array of specialized skills that are prevalent in Food Service, Accommodation, Retail Sales, and Healthcare are in demand in Napa County. Many of the top common skills are transferable across industries and can provide a durable foundation for future career pathways.

An important set of skills that have gained more relevance in recent years are software skills. For some occupations and job titles, software skills become essential, core skills. For other occupations, they are important complements that might provide an advantage to a worker interviewing or attempting to relocate into another occupation.

In Napa County, more traditional Microsoft Office skills are in highest demand and are also frequently listed in worker profiles, reflecting a balance of supply and demand. Less traditional software skills, such as SAP Applications and SQL, with a gap between demand and the frequency listed in profiles provide opportunities for targeted training efforts.

Another important aspect when looking at Job Postings are the specific credentials or qualifications demanded by employers in the region. In Napa County, qualifications related to the Healthcare industry experience the highest demand, with **Registered Nurse, Basic Life Support (BLS) Certification and Cardiopulmonary Resuscitation Certification (CPR)** requested the most often in job postings.





Digital Skills

In line with trends identified in Lightcast research [Rural's Rise⁴](#), job postings have increased in Napa County while postings were down significantly in San Francisco County during 2022 as compared to 2019. However, an analysis of skills demand growth does not indicate a significant increase in technology skills demand that rural population centers outside of Silicon Valley may have anticipated. Rather than an abrupt increase in technology skills demand, Napa County should expect organic demand growth as legacy sectors adopt digital skills requirements across functions, including frontline roles.

County	Unique Job Postings January - December 2019	Unique Job Postings January - December 2022	Percentage change
San Francisco	425,618	371,533	-13%
Napa	17,419	27,229	+56%

Some digital skills are foundational, for example data entry, e-mail, e-commerce transactions, and timekeeping software. Others are industry-specific skills, such as restaurant servers using a point-of-sale interface or nursing assistants using Epic, an electronic medical records system. Investing in digital skills development, even for frontline roles can pay off in higher wages and reduced productivity bottlenecks.⁵

⁴ <https://lightcast.io/resources/research/rurals-rise>

⁵ https://nationalskillscoalition.org/wp-content/uploads/2023/02/NSC-DigitalDivide_report_Feb2023.pdf



Workforce Capacity and Alignment to Local Industry Needs



Demographics, Workforce and Community Characteristics

Napa County's population **is projected to shrink 3% by 2030**, shedding nearly 4,500 residents. The expected decrease is concentrated in two race and ethnicity categories: White, non-Hispanic residents (-10,000+) and American Indian or Alaskan Native, Non-Hispanic (-90).

The region experienced a net loss of 882 residents in 2020 (5,319 inbound and 6,201 outbound migrations), drawing and losing residents primarily from/to other counties in California. The highest net out-migration was to Solano County, Lake County, Sonoma County, Sacramento County, and Ada County, Idaho.

When building a community workforce strategy, it is helpful to dive deeper into population trends to identify which age cohorts are expected to grow as a share of the region's population. By 2030, Napa County **is projected to see a declining youth population tempered by a moderate increase in 35–54-year-olds**, generally considered to be in their prime-earning years. An increasing number of older residents, ages 75+ will place increased demand on regional health care systems that are already grappling with workforce shortages.

Risk of retirement is high in the region and the millennial population is lower than the national average.

Surrounding counties in the North Bay region are expected to see growth in younger population, ages 15-24, a trend that Napa County employers **should plan to leverage for staffing entry-level jobs in key frontline industries like Beverage Manufacturing, Food Services and Drinking**

Places, and Accommodation. To attract young talent, it will be key to demonstrate career pathway potential via the foundational skills gained in these entry-level roles.

Napa County's unemployment rate in November 2022 was 3.15%, decreasing from 3.68% 5 years before and from a peak of 9.08% during the 2020 pandemic year. **A threat to Napa County's full economic recovery is a decreasing labor force participation rate** - the total of the county's citizens who are employed or officially considered unemployed divided by total population over age 16. Shrinking labor force participation, even when unemployment is low, means fewer people are able or willing to engage in the workforce.

Indicators	Napa County
Population (2022)	135,886
Labor Force (Sept. 2022)	70,669
Jobs (2022)	81,473
Unemployment Rate (Nov. 2022)	3.16%
Unemployment in 2020	9.08%
Labor Force Participation Rate (Nov. 2022)	60.78%
Labor Force Participation Rate (2017)	65.19%



According to the US Census Bureau's American Community Survey (ACS), Napa County's 4.9% poverty level is well below the national average of 9.1%, however the cost of living is significantly higher than the national average – which impacts citizens and the workforce in many ways. Child-care costs, which can be a driver of labor force participation, are a higher share of household income in Napa County than elsewhere in the US. For medium US counties (population 100,000 - 499,999), the median yearly price for infant center-based care in 2022 was \$11,354 in 2022, 13.9% of family income. By comparison, **Napa County families pay a median \$18,909, a 17.3% share of their income.**

Indicators	Napa County
Median Household Income	\$92,219
% Poverty Level	4.9%
Cost of Living	144.1
Childcare Price as Share of Family Income ⁶	17.3%
Median Yearly Childcare Price ⁷	\$18,909



⁶ Infant Center Based 2022

⁷ Infant Center Based 2022



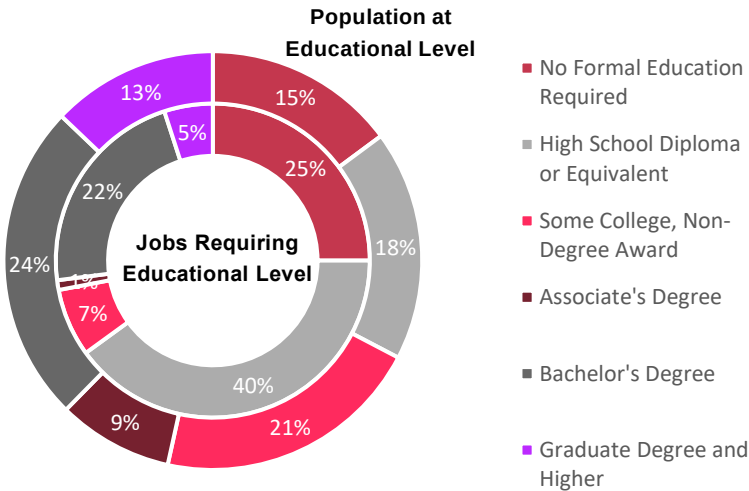
According to the ACS, just 1.4% of Napa County commuters take public transportation to work, with the vast majority (74.9%) driving alone to work - another financial consideration when gasoline prices are high.

How do available jobs in Napa County match up to residents' education levels?

The majority of jobs (65%) in Napa County require either no formal education or a high school diploma only, while 22% require a Bachelor's degree and 5% a graduate degree or higher. However, Associate's, Bachelor's and graduate degree holders are oversupplied in Napa County relative to job demand which indicates **many residents may be underemployed in roles with lower requirements.**

This dynamic, coupled with worker preferences for roles with predictable hours and flexibility could drive those with more education and sought-after skills (thus, more bargaining power) to **seek employment outside of Napa County** or seek a job that can be performed remotely.

In fact, 7.3% of Napa County residents report working exclusively from home – exactly the national average. Just under 30,000 Napa County residents commute to other counties for work, with roughly 15% of those commuting to either Marin or San Francisco County. 36,000+ workers commute to Napa County, with more than 35% of those coming from neighboring Solano County.



Focus for Workforce Development Investments

Of particular interest to workforce development organizations are jobs in demand that require credentials beyond high school, but not necessarily a degree. Training for those roles can often be funded through federal and state workforce development programs and provides an entry point to high-mobility career pathways. Top posted jobs in Napa County that require more than a high school diploma but not a Bachelor’s degree include Bookkeeping, Accounting & Auditing Clerks, Nursing Assistants, Licensed Practical & Licensed Vocational Nurses, and Automotive Service Technicians & Mechanics.

As additional education and credentials are obtained, these middle skill jobs can serve as a springboard for career pathway advancement and economic mobility. For example, the top “next-step” jobs for Bookkeeping, Accounting & Auditing Clerks are Accountants & Auditors and Financial Managers, both of which offer a significant salary differential.

Feeder Occupation	Opportunity Occupations	Mean Salary Difference
▪ Bookeeping, Accounting and Auditing Clerks 	▪ Accountants and Auditors	\$27,305
	▪ Financial Managers	\$70,101
	▪ First-Line Supervisors of Office and Administrative Support Workers	\$13,503
	▪ Payroll and Timekeeping Clerks	\$6,026
	▪ Property, Real Estate, and Community Association Managers	\$7,787
	▪ Credit Counselors	\$9,956



Strategic Recommendations

These recommendations are designed to help Workforce Alliance of the North Bay leaders and their community partners cultivate a sustainable workforce pipeline that nurtures the growth of key industries, employers, and jobs that provide long-term career development and economic mobility for citizens of Napa County.

Understanding Macro Trends

The walls between economic and workforce development have come down as regions recognize that talent drives economic growth, and the availability of skilled talent is a top concern for companies considering whether to locate or expand in an area.

Successful regions are promoting the capacity of their current workforce *in addition to* a cohesive strategy for building a sustainable and adaptable talent pipeline - giving employers the confidence they can grow. It is important to shorten the feedback loops between economic and workforce development and align around shared targets for attracting high-quality jobs to the region while simultaneously building a skills development pipeline that fuels continued growth - a virtuous circle.

Workforce alignment has evolved from “selling” candidates for jobs to “selling” job opportunities to citizens.

The historically tight labor market is unlikely to reverse course as the drivers of local and national workforce shortages are largely structural - rather than situational. While short-term interventions can show impact, communities should invest in cross-sector planning and innovation to develop creative strategies that address long-term demographic trends, industry shifts and the effects of digital disruption across sectors.

Workforce alignment has evolved from “selling” candidates for jobs to “selling” job opportunities to citizens. Alongside efforts to attract business to locate and expand, regions must also focus on the drivers of talent retention and attraction, with a compelling value proposition around high-mobility career opportunities and vibrant quality of life.

In the North Bay region, there are unique challenges around several key industries as well as unique opportunities given the proximity to the Bay Area’s tech ecosystem and the implications of changes in work arrangements/preferences since the Covid-19 pandemic. If not addressed, low labor force participation and high cost of living could be a drag on continued economic recovery. Undersupply of jobs for degree-holders could fuel continued out-migration.

A Strategic Partnership Framework

Strategic recommendations are organized around **six phases** of talent attraction/development, each with its own planning horizon, unique set of key stakeholders, and time-to-payoff for the community. A comprehensive community strategy will invest simultaneously in all phases - to compound future benefits and buffer against shifts in market conditions. An effective workforce strategy should also be integrated with community planning for housing, infrastructure (i.e. broadband, transportation), childcare, and livability amenities.

	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6
	Talent Attraction	Transferable Skills	Technical & Certificate Programs	Advanced Skill Sets	Information gap	Starting Early
Time Frame	0-6 Months	6 Months - 2 Years	2 - 4 Years	4 - 7 Years	7-10 Years	10 - 15 Years
Focus	Better matching current workforce with local openings.	Upskilling and reskilling workers in the area	Alignment of industry demand to local talent development programs.	Long-term alignment with higher education programs.	Build awareness of high-demand career pathways in middle and high school.	Spark interest in STEM and the world of work.
Partners						
Employers and Industry Groups	✓	✓	✓	✓	✓	✓
Staffing and Job Placement Agencies	✓					
Career Service Providers	✓	✓				
Local Chambers of Commerce and EDOs	✓					
Destination Marketing Partners	✓					
Community and Technical Colleges	✓	✓	✓		✓	✓
Training Providers (non-traditional education)		✓				
Colleges and Universities	✓	✓	✓	✓	✓	
Workforce Development Agencies	✓	✓	✓		✓	
Federal, State and Local Development Workforce Boards	✓	✓	✓	✓		
Local Human Services Organizations	✓	✓				
K-12 Education						✓

PHASE 1 - Talent Attraction (0 to 6 Months)

Focus: Better matching of current workforce with local job openings; attracting skilled out-of-market talent to fill jobs where demand eclipses local workforce capacity.

- Labor market data cannot substitute for direct consultation with the end-customers of your area's talent "supply chain" – local employers. Leverage your data to provide a shared understanding of local labor market conditions and augment this with primary accounts of employers' current hiring needs/challenges, emerging skills requirements, and their expectations for future demand.



- Encourage employers to examine job descriptions and confirm that skills and experience requirements match job responsibilities. Coach jobseekers to include in-demand specialized skills and qualifications, as well common skills and software skills on their resume and online profiles.
- Seek immediate labor force participation gains by reducing fragmentation in job search and career support services across the region; develop centralized ways to market job opportunities and promote programs available to support immediate employment (i.e. childcare subsidies, short term reskilling programs).
- Help employers widen their talent pools by considering non-traditional or “hidden” talent - for example, veterans transitioning back into civilian life or the formerly incarcerated - and promote skills-based hiring as a better measure to assess whether a candidate can successfully perform a job. [Recent findings by Bain & Company⁸](#), using Lightcast data indicate that more than 60% of middle-skill jobs require a bachelor’s degree when, in actuality, a four-year degree is not a good proxy for the skills needed to perform the job. Putting the focus on skills over degrees in the hiring process widens potential talent pools and aligns criteria more closely with future job performance.
- Work with industry partners to market local hospitality, food service, and personal care jobs as “launchpads” where workers can build in-demand transferable skills. Promote employers in those industries that provide upskilling, career development, and/or tuition reimbursement for further education.⁹
- [Remote work is successfully drawing disabled workers off the sidelines¹⁰](#). Work with local industry and employer groups to assess where you might build pockets of remote-enabled employment opportunities targeted for Napa County’s disabled population.
- Understand the concerns of current and potential workers about the jobs and quality of life in your community. With industry and economic development partners, establish a profile of your key targets for talent attraction. Leverage migration trends data (see below) to identify competitive markets for relocation, especially markets where relocating to the North Bay area may provide a comparative wage gain. For example, the five markets below are ranked by

⁸ <https://www.bain.com/insights/eliminate-a-degree-of-difficulty-hire-for-skills-not-school>

⁹ <https://www.linkedin.com/news/story/hotels-new-job-pitch-career-growth-5194865/>

¹⁰ <https://fortune.com/2023/02/24/remote-work-disabled-employment-record-high-remote-work-office-man-dates/>



the opportunity to attract Registered Nurses, which will continue to be a vital role in Napa County as the aging population grows and requires more health care services.

County	Total Pool of RNs	Earnings Gain if Relocate
Los Angeles, CA	94,720	\$11.09
Salt Lake, UT	12,746	\$13.00
San Francisco, CA	12,488	\$7.44
Maricopa, AZ	40,551	\$14.32
DuPage, IL	11,047	\$13.87

- Drive out-of-market prospects to a website that sells the advantages of living and working in your region, based on an understanding of their top concerns.
- Leverage tech industry dispersion and remote work trends as an opportunity to attract technology workers to fill key roles now or work remotely from the North Bay area. Identify whether there are opportunities to transition displaced H1-B Visa holders to local technology roles, even in legacy industries.
- Partner with destination marketing organizations in the North Bay region to promote opportunities to live and work to area visitors. Leverage the region's natural assets and concentration of hospitality amenities to attract remote or contract/contingent workers, (like travel nurses). Promote local opportunities to current remote workers through networking events and/or marketing in those "third spaces" where remote workers congregate.

PHASE 2- Transferable Skills (6 Months to 2 Years)

Focus: Upskilling and reskilling workers already in your area with short-term training and credentials that are nimble enough to evolve with market demand

- Confirm with employer partners their hiring timeline projections for key positions (i.e. plan to hire 15 new production workers in Q3) and the skills required to qualify for the roles. Where the skills of available talent don't match up, work with employers and training providers to spin up responsive short-term credentialing programs.
- Create incentives to upskill/reskill by prioritizing programs that are short-term, low or no cost, provide stackable (micro)credentials and rolling enrollment opportunities. Incentivize employers to offer upskilling to incumbent workers on-the-job or to hire an employee before



training commences. Connect training and upskilling to “next jobs” along priority pathways. Backfill vacated roles with new entrants from bridge programs.

- Work with industry partners in food services, accommodation, and hospitality to standardize the foundational training and credentialing as skills are obtained on the job. Once training pathways are standardized, provide group upskilling opportunities (in a digital format where possible to reach the largest number of workers).
- Ensure that local human services organizations are fully integrated into the Workforce Development System/One Stop and work with these organizations to address the barriers to labor force participation for targeted talent pools in the community. This will allow businesses to access untapped labor pools.
- Prioritize digital upskilling, even for frontline roles - to address digital skills gaps and promote economic mobility. [Recent research by the National Skills Coalition¹¹](#) estimates that 36% of workers in the hospitality industry have limited or no digital skills and this “digital skill divide disproportionately impacts workers of color, low-income individuals, and rural residents.” According to recent [Brookings research¹²](#), “workers that qualify for jobs that require even one digital skill can earn an average of 23% more than in a job requiring no digital skills. Moving from a job requiring no digital skills to one requiring at least three can increase pay by an average of 45%.”
- Consult with local industry/employers to identify industry-specific digital skills that could be conferred on the job or in short-term “boot camp” settings. For example, Lightcast identifies the following emerging digital skills that are in-demand in the retail sector: Ecommerce, Point of sale systems, Retail analytics (e.g. SAS), and Robotics.
- Investigate the viability of [“Returnsips”¹³](#) to draw displaced workers back into jobs by providing training in the latest digital skills/technologies, networking opportunities, job placement and support.
- Identify prospective talent pools for education and upskilling to meet future demand, where public workforce development funds can be best leveraged. Within the four North Bay counties, there are 152,695 residents with a high school diploma only, or some college

¹¹ <https://nationalskillscoalition.org/resource/publications/the-new-landscape-of-digital-literacy/>

¹² <https://www.brookings.edu/research/as-the-digitalization-of-work-expands-place-based-solutions-can-bridge-the-gaps/>

¹³ <https://www.aarp.org/work/job-search/returnships-adult-internships/>

credits, but no degree - that could be targeted for middle skill technical roles or incentivized to complete a degree program.

PHASE 3 - Technical and Certificate Programs (2 to 4 Years)

Focus: Near-term alignment of forecasted industry demand with local talent development programming to facilitate attainment of the most relevant degrees and certifications

- Confirm with employers the key post-secondary programs that confer high-demand skills and credentials. Collaborate to promote and drive enrollment in these preferred programs of study.
- Define with cross-sector partners what constitutes a “good job” in the region. Identify a list of targeted “good jobs” that require post-secondary training/credentials. Identify the career pathways that lead to those jobs and where those jobs can lead with even more education, training, and experience.
- Develop on-ramps to high-demand, high-potential pathways that are projected to grow in the next several years. Provide bridges to priority pathways from industries and jobs with less potential for mobility.
- Consider how earn and learn models like Apprenticeship can be applied – even in non-traditional industries.
- Promote successful workforce alignment to attract new business investment in the region. Align business attraction with the region’s talent development strengths.

PHASE 4 - Advanced Skill Sets (4 to 7 Years)

Focus: Long-term alignment of higher education programming to develop a sustainable highly-skilled pipeline for the region’s driver industries

- Map where employers are participating on industry advisory boards at local colleges and universities, advising on the alignment of program curriculum to success in the and the knowledge, skills, and abilities that set up students for (1) successful job placement; and (2) lifelong career development.
- Aggregate input across boards to provide better intelligence to all organizations in the talent development system. Promote collaboration across institutions to fill programming gaps in the region, or downsize or sunset programs where industry demand isn’t sufficient to provide



employment for graduates. Collaborate to drive enrollment in programs of study that fuel local industry needs.

- Improve speed to market of skilled talent (credential attainment) by facilitating seamless articulation agreements between community college and university programs and where possible, providing credit for prior learning.
- Improve attachment to job opportunities in your market by supporting employers' capacity to offer internships for current college & university students. Work with career services departments to drive employer participation in career fairs, collaborate on specialized career fairs that appeal to employers' hiring priorities - by industry or sector.

PHASE #5 - Information Gap (7 to 10 Years)

Focus: Build awareness of high-demand high-potential career pathways with industry-aligned programming in middle and high schools.

- Provide semi-annual labor market updates to K-12 leaders and policy makers to communicate current and emerging skillsets that set up students for future success.
- Establish a list of entry-level job requirements across industries. Leverage youth funds to provide earn and learn opportunities that combine hourly work with foundational skills development and career counseling.
- Grow the number of programs offering dual enrollment opportunities that confer post-secondary credits and industry-recognized credentials to increase the likelihood of post-secondary enrollment and/or attachment to the workforce after graduation.
- Communicate preferred credentials/degrees and local programs of study that fuel industry needs and connect the dots to enrollment.
- Backmap established local career pathways into K-12 and cultivate future talent by fostering industry partnerships with local high schools to offer a range of career experiences. Provide awareness of local opportunities and relevance for classroom learning through business/plant tours, job shadows, industry-supported classroom projects, work experience, and more.



PHASE #6 - Starting Early: 10 to 15 Years

Focus: Draw students to foundational career and technical education programs by sparking interest in STEM and the world of work.

- Promote the work of [local STEM partnerships](#) to galvanize community support for programming that builds foundational skills, interests and aptitudes for the jobs of tomorrow.
- Grow access to out-of-school enrichment programs that focus on future employability skills, including Junior Achievement, 4-H Clubs, Boys and Girls Clubs, YMCA programs, coding camps, Boy Scouts, Girl Scouts and more. Connect young people participating in those programs to information about career and technical education programs available to them in middle and high school.
- Leverage local community college and university resources to provide youth summer camps, hackathons, and other ways to “try out” a career program of study.

Advancing this strategic framework as a community will require stakeholders to:

1. **Coordinate and collaborate** across organizations, understanding that the work cannot be accomplished in siloes. Each partner organization brings unique expertise, networks, and resources to the table and should understand their organization’s role in advancing key pieces of the overall strategy.
2. **Follow the lead of employers**, the end-users of your region’s talent “supply chain.” Focus on the benefits to employers of collaborating - even with competitors - to grow the pool of talent for all and the skills that are aligned to common industry pain points.
3. **Focus on skills**, the common language that brings together job seekers, employers, and educators for mutual benefit.



Appendix 1

Occupation	% of Total Jobs in Industry (2022)	Employed in Industry (2022)	Employed in Industry (2028)	Projected % Change (2022 - 2028)	Median Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
Demonstrators and Product Promoters	10.40%	1,196	1,224	2%	\$18.38	No formal educational credential	Short-term on-the-job training
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	9.50%	1,097	1,104	1%	\$29.42	High school diploma or equivalent	Moderate-term on-the-job training
Packaging and Filling Machine Operators and Tenders	6.90%	801	811	1%	\$22.22	High school diploma or equivalent	Moderate-term on-the-job training
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	6.60%	756	756	0%	\$15.96	No formal educational credential	Short-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	5.30%	613	637	4%	\$38.19	High school diploma or equivalent	Moderate-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	3.20%	364	379	4%	\$17.59	No formal educational credential	Short-term on-the-job training
Waiters and Waitresses	3.20%	364	380	5%	\$16.10	No formal educational credential	Short-term on-the-job training
Bartenders	2.50%	285	305	7%	\$16.06	No formal educational credential	Short-term on-the-job training
Retail Salespersons	2.40%	279	291	4%	\$16.66	No formal educational credential	Short-term on-the-job training
General and Operations Managers	2.00%	227	237	4%	\$49.24	Bachelor's degree	None
First-Line Supervisors of Production and Operating Workers	1.90%	223	232	4%	\$36.96	High school diploma or equivalent	None

Industrial Truck and Tractor Operators	1.90%	218	226	4%	\$21.38	No formal educational credential	Short-term on-the-job training
Merchandise Displayers and Window Trimmers	1.80%	209	218	5%	\$17.74	High school diploma or equivalent	Short-term on-the-job training
Industrial Production Managers	1.40%	166	171	3%	\$61.11	Bachelor's degree	None
Sales Managers	1.40%	161	166	3%	\$62.60	Bachelor's degree	None
Maintenance and Repair Workers, General	1.40%	159	164	3%	\$23.23	High school diploma or equivalent	Moderate-term on-the-job training
Market Research Analysts and Marketing Specialists	1.40%	158	170	7%	\$36.98	Bachelor's degree	None

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