



Workforce Alliance of the North Bay

Marin County Labor Market Analysis & Strategy



MAY 2023

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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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Acknowledgements

Lightcast gratefully acknowledges the support of Workforce Alliance of the North Bay. A special thank you goes to Bruce Wilson and Sylwia Palczewska for their leadership, collaboration, and commitment to the success and prosperity of the North Bay region and all of the counties – individual and collectively – that comprise it.

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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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 snapshot report focuses on Marin 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 residents 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.

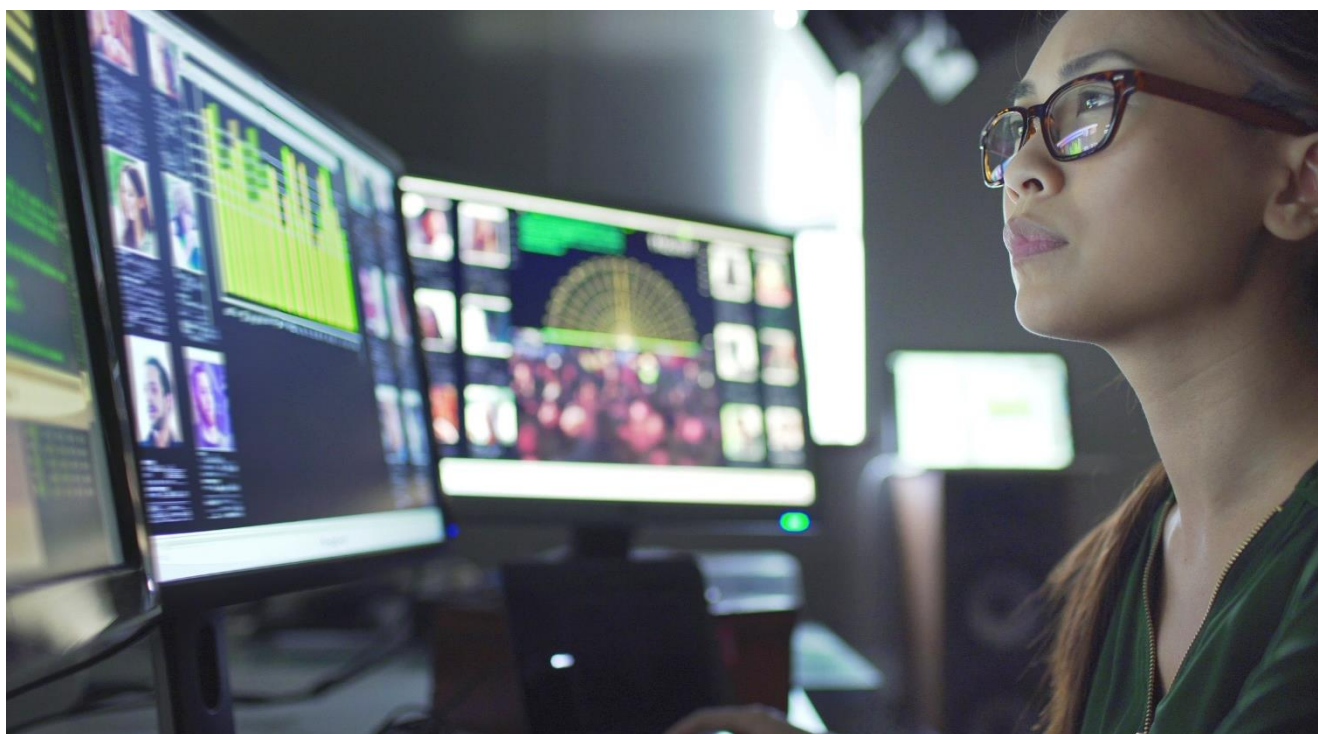
A comprehensive talent alignment strategy balances focus on the now, near, and far:

- 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 – Marin County



Key Industries

Marin 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, the County's largest industries are Health Care & Social Assistance and Government, followed by Retail Trade. The table on the next page 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.

Average earnings
Marin County are
highest in
Professional,
Scientific & Technical
Services and Local
Government.

Industries in Marin County with the highest projected 2028 location quotient are Private Households (6.06) and Food & Beverage Stores. Average earnings are highest in Professional, Scientific & Technical Services (\$158,395), Local Government (\$137,236), and Ambulatory Health Care Services (\$128,242). In contrast, low average earnings in Private Households, Food Services & Drinking Places, and Social Assistance fall below the [MIT living wage](https://livingwage.mit.edu/)² for a single adult with no children in Marin County (\$26.63/hr. or \$55,390 annually).

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.

² <https://livingwage.mit.edu/>

Industry (3-digit NAICS)	2023 Jobs	2028 Jobs	2023 - 2028 Change	2023 - 2028 % Change	Avg. Earnings	2028 LQ
Local Government	11,896	12,320	425	4%	\$137,236	1.19
Food Services and Drinking Places	10,512	11,398	886	8%	\$39,744	1.23
Professional, Scientific, and Technical Services	8,799	8,647	(152)	(2%)	\$158,395	1.03
Ambulatory Health Care Services	7,221	8,079	858	12%	\$128,242	1.23
Administrative and Support Services	5,826	6,073	247	4%	\$83,685	0.87
Social Assistance	4,942	5,368	426	9%	\$47,550	1.46
Private Households	4,808	5,324	516	11%	\$22,504	6.06
Educational Services	4,433	4,806	373	8%	\$68,463	1.47
Specialty Trade Contractors	4,263	4,474	211	5%	\$100,193	1.19
Food and Beverage Stores	3,991	3,890	(101)	(3%)	\$51,257	1.73

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.

With the exception of Professional, Scientific & Technical Services and Food & Beverage Stores, the remaining top 10 industries are expected to grow in upcoming years. Food Services & Drinking Places and Ambulatory Health Care Services are the industries expecting the highest growth in upcoming years, with a combined 1,700+ new jobs by 2028. On a percentage basis, **notable growth is expected in emerging industries Computer and Electronic Product Manufacturing and Chemical Manufacturing.**

Hospitals, Professional, Scientific & Technical Services, Real Estate, Insurance Carriers and the Federal Government are forecasted to experience moderate decreases, with an estimated 664 combined lost jobs by 2028. Facilitating the relocation of workers from one industry to another can help promote economic stability and lateral mobility across industries.

Spotlight on Professional, Scientific & Technical Services

The Professional, Scientific & Technical Services industry in Marin County provides high average earnings per job, although As the table on the following page shows, highly skilled professionals across a range of business functions can earn wages well above the median in Marin County, with most top roles requiring at least a Bachelor's degree for entry. It should be noted that a decline in the number of many of these jobs is expected by 2028. Conversations with local employers can help pinpoint where and why these job shifts may be happening and how upskilling/reskilling can help mitigate the disruption.

Professional, Scientific & Technical Services Industry Top 10 Occupations	% of Total Jobs in Industry (2022)	2023 Jobs	2028 Jobs	2023 - 2028 % Change	Median Hourly Earnings	Typical Entry Level Education
Software Developers	6.0%	516	466	(10%)	\$70.07	Bachelor's degree
Accountants and Auditors	5.1%	443	424	(4%)	\$46.16	Bachelor's degree
Lawyers	4.4%	390	393	1%	\$73.57	Doctoral or professional degree
Management Analysts	3.2%	275	249	(9%)	\$50.10	Bachelor's degree
General & Operations Managers	3.1%	269	262	(2%)	\$58.62	Bachelor's degree
Market Research Analysts & Marketing Specialists	2.6%	224	215	(4%)	\$42.10	Bachelor's degree
Paralegals & Legal Assistants	2.6%	225	229	1%	\$31.90	Associate's degree
Computer & Information Systems Managers	2.4%	207	184	(11%)	\$88.84	Bachelor's degree
Architects	2.3%	202	211	5%	\$45.66	Bachelor's degree
Business Operations Specialists, All Other	2.1%	185	175	(5%)	\$37.99	Bachelor's degree

Occupations and Skills in Demand

The top three jobs (by volume) in Marin County are Home Health & Personal Care Aides, Cashiers, and Retail Salespersons.

Automation Indices above 100 for Fast Food & Counter Workers, Waiters & Waitresses, Maids & Housekeeping Cleaners, Janitors & Cleaners, and Cashiers indicate those jobs have **an above average risk of being displaced as industries automate tasks**. Despite these high automation indices, demand for frontline roles, customer-facing, and support roles across Marin County is projected to grow steadily through 2028, likely **exacerbating current worker shortages**.

Automation Indices for several occupations indicate those jobs have an elevated risk of **displacement** as industries automate tasks.

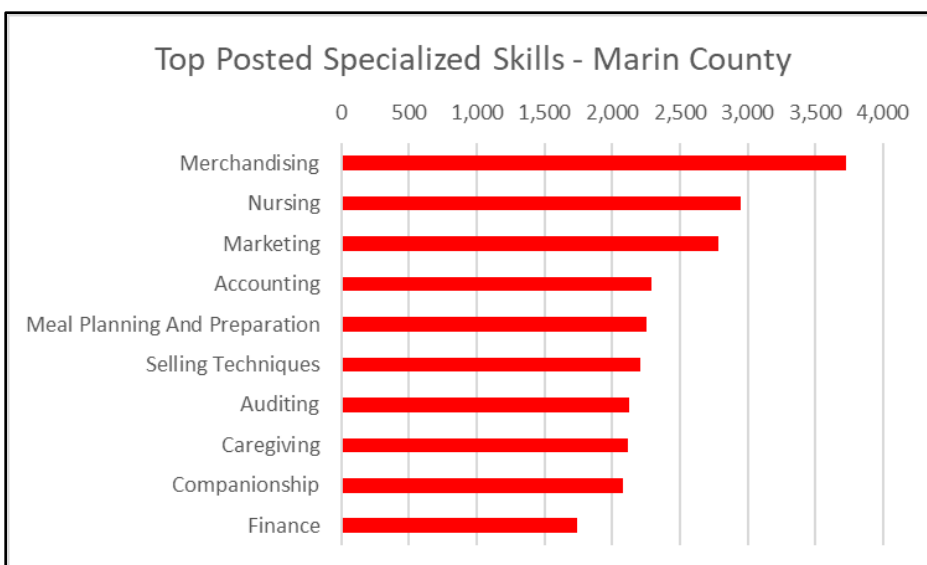
Eight of the top 10 occupations in Marin County earn median annual wages below the MIT living wage for a single adult with no children in Marin County (\$55,390), which compounds the challenge of filling these mostly frontline service and hospitality roles. Registered Nurses and General & Operations Managers command higher wages - at \$150,909 and \$121,920 respectively, but require specialized education and experience. The table on page 9 provides more detail on the top 10 occupations in Marin County.

Marin County Top 10 Occupations	2023 Jobs	2028 Jobs	2023 - 2028 % Change	Annual Openings	2028 LQ	Automation Index	Median Annual Earnings
Home Health & Personal Care Aides	5,925	6,790	15%	1,123	2.03	93.6	\$34,900
Cashiers	3,596	3,475	(3%)	670	1.44	105.5	\$35,699
Retail Salespersons	2,999	3,077	3%	456	1.07	93.4	\$38,322
Fast Food & Counter Workers	2,692	2,939	9%	656	1.12	130.8	\$38,053
Janitors & Cleaners	2,383	2,532	6%	373	1.46	122.5	\$33,209
General and Operations Managers	2,304	2,378	3%	219	0.92	82.2	\$121,920
Registered Nurses	2,163	2,204	2%	133	0.91	85.3	\$150,909
Waiters & Waitresses	1,983	2,077	5%	430	1.25	129.8	\$34,399
Maids & Housekeeping Cleaners	1,974	2,113	7%	312	2.44	124.5	\$33,495
Childcare Workers	1,867	2,017	8%	352	2.96	88.0	\$33,291

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.

Marin County had a total of **48,958 unique job postings** during 2022. Monthly postings volume hit a peak in April 2022 with 5,177 postings, then ticked downward to end the year with 3,136 postings in December. Employers with the largest number of postings in Marin County were health care and hospital systems, local government, major retailers, and life sciences research & development firm BioMarin Pharmaceutical.



Skills related to retail operations, nursing & health care, accounting & finance, and personal in-home care services are in highest demand in Marin County as reflected in 2022 job postings. Top software skills include the Microsoft Office suite of products, Salesforce, and programming languages Python, Java, and SQL.



Digital Skills

In line with trends identified in Lightcast research [Rural's Rise](#)³, job postings increased in Marin 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 population centers outside of San Francisco may have anticipated. Rather than an abrupt increase in technology skills demand, Marin and other North Bay counties 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%
Marin	34,351	48,528	+41%

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.⁴

³ <https://lightcast.io/resources/research/rurals-rise>

⁴ 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

Marin County's **population is projected to grow 1% by 2030**, adding just under 1,900 residents. Population growth is expected in all race and ethnic categories, with the exception of White, non-Hispanic residents, where a 5% decline is expected.

Marin County experienced a net loss of 771 residents in 2020, both losing and drawing new residents primarily from other counties in California. Marin County saw the highest net in-migration from San Francisco County, San Mateo County, Alameda County, Santa Clara County, and New York County (NY). The highest net out-migration was to Sonoma County, Solano County, Contra Costa County, Placer County, and Sacramento County.

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, Marin County is projected to see a declining youth population, tempered by increases in key age cohorts, including early entrants to the workforce (20 to 29 years) and 35-49 year olds, generally considered to be in their prime-earning years. An already robust local healthcare industry will require even more resources to support the increasing number of older residents, ages 75+.

Marin County's population is expected to grow in several key workforce-age demographics by 2030.

Marin County's unemployment rate in January 2023 was 3.05%, decreasing from a peak of 6.95% during the 2020 pandemic year, but higher than the 2.45% rate five years ago. **A threat to Marin County's full economic recovery is a decreasing labor force participation rate** - the total of the county's residents 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	Marin County
Population (2023)	260,901
Labor Force (Jan. 2023)	130,754
Jobs (2022)	119,291
Unemployment Rate (Jan. 2023)	3.05%
Unemployment in 2020	6.95%
Labor Force Participation Rate (Jan.2023)	60.65%
Labor Force Participation Rate (2018)	66.65%



According to the US Census Bureau's American Community Survey (ACS), Marin County's 3.9% poverty level is well below the national average of 9.1%, however the cost of living (163.3) is significantly higher than the national average – which impacts residents and the workforce in many ways. Childcare costs, which can be a driver of labor force participation, are a higher share of household income in Marin 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, Marin County families pay a median \$24,196, a 14.7% share of their income.

Indicators	Marin County
Median Household Income	\$121,671
% Poverty Level	3.9%
Cost of Living	163.3
Childcare Price as Share of Family Income ⁵	14.7%
Median Yearly Childcare Price ⁶	\$24,196



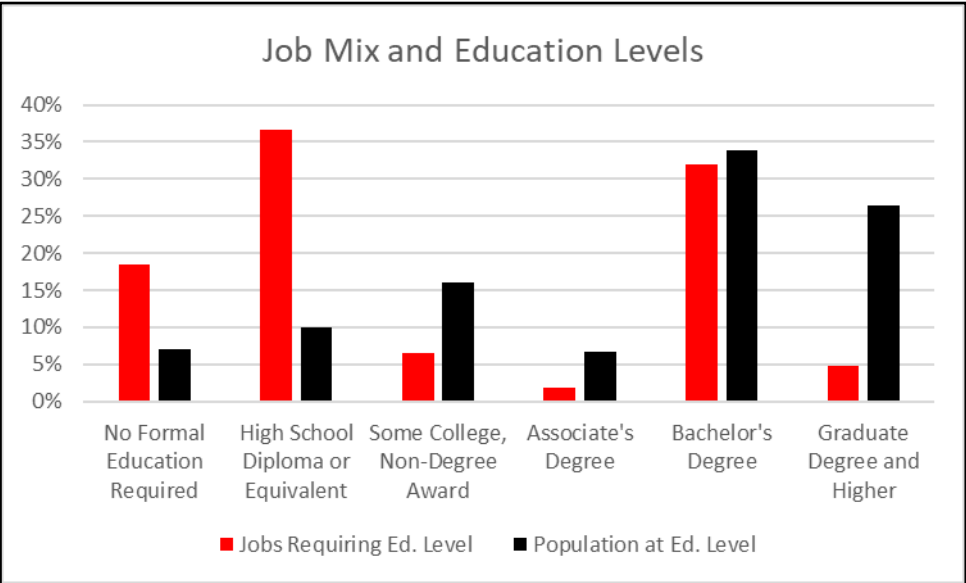
According to the ACS, 8% of Marin County commuters take public transportation to work, with the vast majority (62.5%) driving alone to work - another financial consideration when gasoline prices are high.

⁵ Infant Center Based 2022

⁶ Infant Center Based 2022

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

The majority of jobs (55%) in Marin County require either no formal education or a high school diploma only, while 32% require a Bachelor's degree and 5% a graduate degree or higher. Associate's, Bachelor's and graduate **degree holders are oversupplied** in Marin 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 Marin County** or seek a job that can be performed remotely. In fact, 16.8% of Marin County

residents report working exclusively from home, more than double the national average of 7.3%.

Over 60,000 Marin County residents commute to other counties for work, with 44% of those commuting to San Francisco County, 13% to Alameda County, and another 10% to Sonoma County. 60,000+ residents of other counties commute to Marin County to work, with 25% of those coming from Sonoma County, 17% from Contra Costa County, and 15% from San Francisco 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 Marin County that require more than a high school diploma but not a Bachelor's degree include Licensed Practical & Licensed Vocational Nurses, Bookkeeping, Accounting & Auditing Clerks, Nursing Assistants, Automotive Service Technicians & Mechanics, and Medical Assistants.

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 Licensed Practical and Licensed Vocational Nurses are Registered Nurses and Medical and Health Services Managers, both of which offer a significant salary differential.

Feeder Occupation		Opportunity Occupations	Mean Salary Difference
Licensed Practical and Licensed Vocational Nurses		Registered Nurses	\$53,463
		Medical & Health Services Managers	\$36,284
		Acupuncturists	\$19,727
		Cardiovascular Technologists & Technicians	\$16,654
		Surgical Technologists	\$21,657
		Radiologic Technologists & Technicians	\$27,204

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
▪ Bookkeeping, 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 residents of Marin 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 residents.

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 residents. 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 & Company⁷](#), 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.⁸
- [Remote work is successfully drawing disabled workers off the sidelines⁹](#). Work with local industry and employer groups to assess where you might build pockets of remote-enabled employment opportunities targeted for Marin 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 markets below are ranked by the

⁷ <https://www.bain.com/insights/eliminate-a-degree-of-difficulty-hire-for-skills-not-school>

⁸ <https://www.linkedin.com/news/story/hotels-new-job-pitch-career-growth-5194865/>

⁹ <https://fortune.com/2023/02/24/remote-work-disabled-employment-record-high-remote-work-office-man-dates/>



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

County	Total Pool of RNs	Earnings Gain if Relocate
Los Angeles, CA	95,034	\$8.73
New York, NY	36,344	\$26.02
Cook, IL (Chicago)	63,991	\$14.32
Maricopa, AZ	40,551	\$11.96
Philadelphia, PA	29,611	\$14.76

- 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 Coalition¹⁰](#) 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 research¹¹](#), “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 [“Returnships”¹²](#) 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 credits (but no degree) that could be targeted for middle skill technical roles or incentivized to complete a degree program.

¹⁰ <https://nationalskillscoalition.org/resource/publications/the-new-landscape-of-digital-literacy/>

¹¹ <https://www.brookings.edu/research/as-the-digitalization-of-work-expands-place-based-solutions-can-bridge-the-gaps/>

¹² <https://www.aarp.org/work/job-search/returnships-adult-internships/>



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 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.



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