



# North Bay Employment Connection (NBEC) Workforce Innovation and Opportunity Act Regional Plan (2021-2024)

**TWO YEAR MODIFICATION - 2023**



**RDA**  
CONSULTING



Workforce  
Development Board  
of Solano County



**WORKFORCE ALLIANCE**  
OF THE NORTH BAY  
DRIVING WORKFORCE TALENT



SONOMA COUNTY  
**WORKFORCE**  
INVESTMENT BOARD

This report was developed by RDA Consulting  
under contract with NBEC.



RDA Consulting, 2023



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## A. Analytical Overview of the Region

- Provide an analysis of current employment and unemployment data.
- Provide an analysis of the current educational and skill levels of the workforce, the current needs of employers in the region, and any relevant skill gaps between the two.
- Provide an analysis of industries and occupations with an emerging demand.

### Population Overview

The North Bay Regional Planning Unit (RPU) is comprised of the counties of Lake, Marin, Mendocino, Napa, Solano, and Sonoma. Within the RPU, the Workforce Alliance of the North Bay is a Joint Powers Agency representing four counties (Marin, Napa, Lake, and Mendocino) under one Workforce Development Board. The North Bay RPU is also commonly referred to as NBEC, or the North Bay Employment Connection, and has been collaborating regionally since 2000. “North Bay RPU” and “NBEC” are used interchangeably throughout this plan.

The geographic spread of the RPU is vast, covering 9,498 square miles and stretching from Marin County just north of the Golden Gate Bridge northward over 180 miles through Sonoma and Mendocino Counties on the Pacific Coast, and through Solano, Napa, and Lake Counties on the eastern border of the RPU. These six counties are home to 1.5 million people and a labor force of over 723,000.

### Demographics

There is significant variance in the demographics of each of the NBEC counties, as shown in Table 1. The rural areas of the region experience greater poverty and lower median household incomes. Mendocino County has the highest percentage of its population living below the federal poverty line, at 15.9% (almost 7% above the overall percentage for California), as well as the lowest median income at \$59,444. Marin County has the lowest percentage of its population living in poverty at 7.5%, and the highest median income at \$118,209.

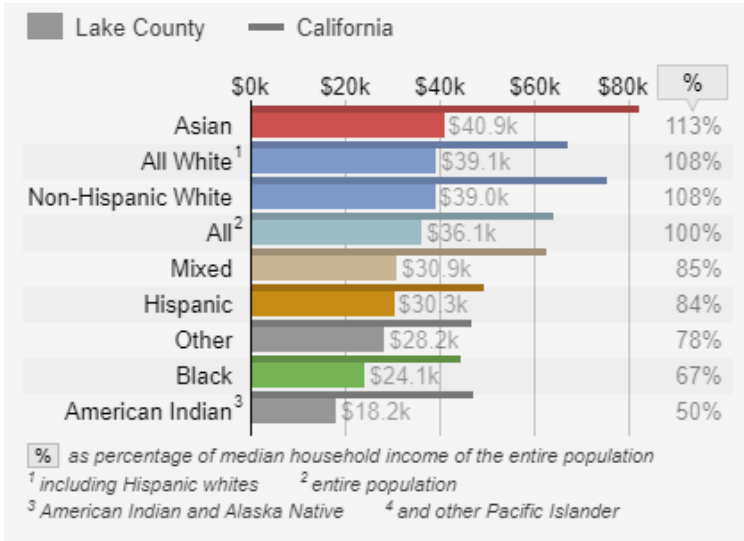
**Table 1. Income and Poverty**

	<b>Population</b>	<b>Median household income</b>	<b>Below poverty</b>
<b>Lake</b>	68,123	\$61,221	12.9%
<b>Marin</b>	262,321	\$118,209	7.5%
<b>Mendocino</b>	91,601	\$59,444	15.9%
<b>Napa</b>	138,019	\$97,213	9.0%
<b>Solano</b>	453,491	\$87,770	9.9%
<b>Sonoma</b>	488,863	\$94,295	9.0%
<b>California</b>	39,237,836	\$84,907	9.0%

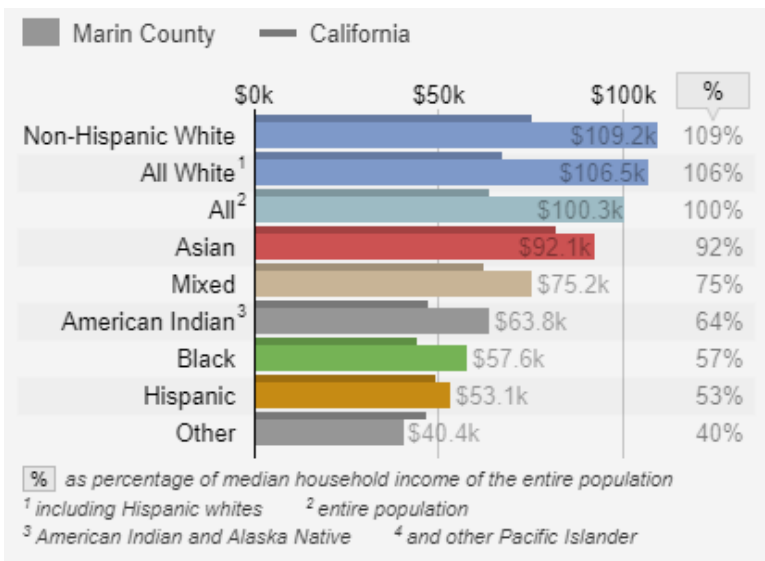
Source: 2021 American Community Survey

Within the NBEC counties, household income varies significantly based on household demographics. Figure 1 - Figure 6 demonstrate the variance in median household income by Race for each county respectively. Across the region, All White, Non-Hispanic White, and Asian populations earn the highest median annual incomes, and Hispanic, American Indian, Black, and other race populations earn the lowest annual incomes on average. This illuminates the need for equity considerations to be built into workforce development programs in the region to reduce these disparities.

**Figure 1. Median Household Income by Race, California and Lake County (Statistical Atlas<sup>1</sup>)**



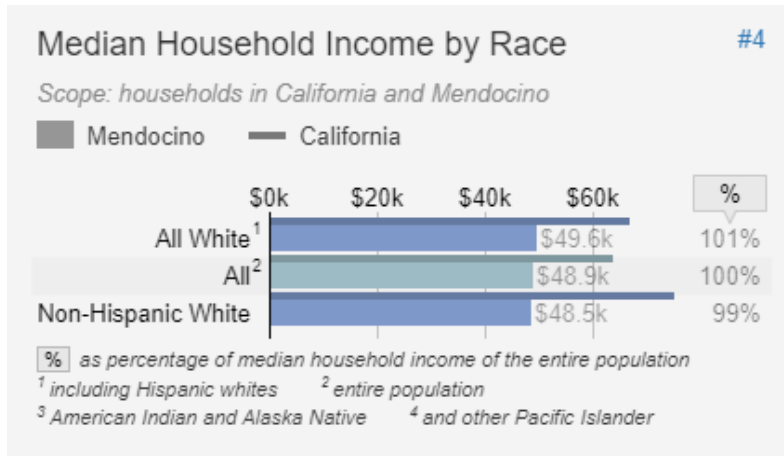
**Figure 2. Median Household Income by Race, California and Marin County (Statistical Atlas<sup>2</sup>)**



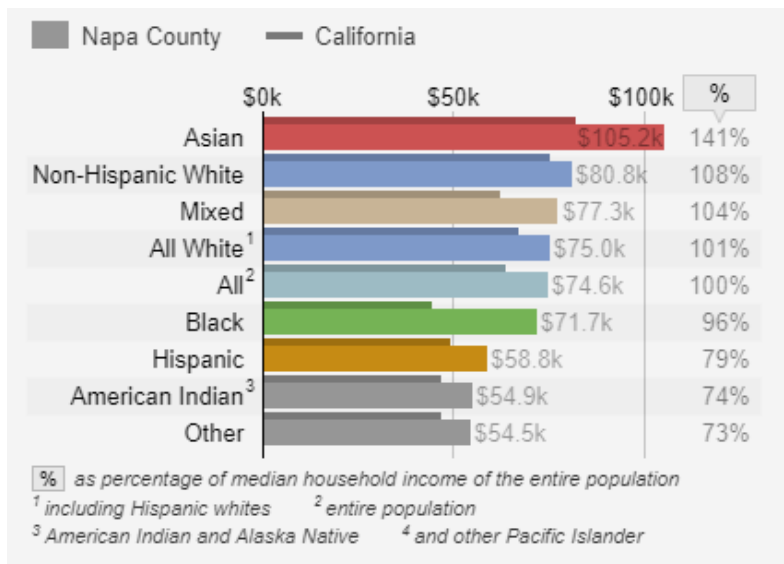
<sup>1</sup> <https://statisticalatlas.com/county/California/Lake-County/Household-Income#figure/median-household-income-by-race>

<sup>2</sup> <https://statisticalatlas.com/county/California/Marin-County/Household-Income>

**Figure 3. Median Household Income by Race, California and Mendocino County (Statistical Atlas<sup>3</sup>)**



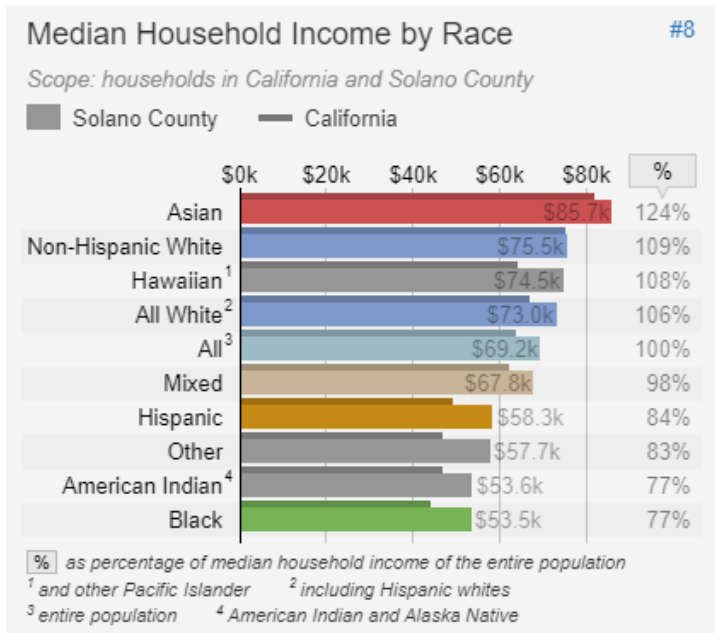
**Figure 4. Median Household Income by Race, California and Napa County (Statistical Atlas<sup>4</sup>)**



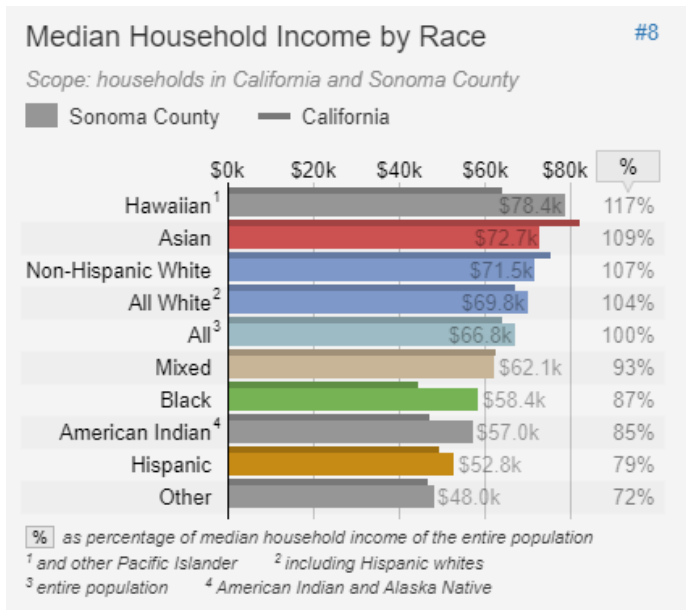
<sup>3</sup> <https://statisticalatlas.com/county/California/Mendocino-County/Household-Income>

<sup>4</sup> <https://statisticalatlas.com/county/California/Napa-County/Household-Income>

**Figure 5. Median Household Income by Race, California and Solano County (Statistical Atlas<sup>5</sup>)**



**Figure 6. Median Household Income by Race, California and Sonoma County (Statistical Atlas<sup>6</sup>)**



<sup>5</sup> <https://statisticalatlas.com/county/California/Solano-County/Household-Income>

<sup>6</sup> <https://statisticalatlas.com/county/California/Sonoma-County/Household-Income>



Not unexpectedly, the educational attainment rates of the population also vary significantly by county as shown in Table 2. Overall, the region has a lower percentage of high school non-completers than the state average. Across the region, approximately 120,000 have less than a high school degree. Lake has the highest percentage of the population with only a high school diploma or less at 52.3%, followed by Mendocino with 42% compared to the state overall at 36.2%. Within the region, Marin’s population has the highest percentage with a baccalaureate degree or higher at 59.5%, followed by Sonoma at 38.3%, compared to the state average of 36.1%. This highly skilled workforce is part of the Bay Area regional economy, but high housing costs and long commutes are major challenges to the workforce and economic development, issues identified in multiple stakeholder sessions.

**Table 2. Educational Attainment age 25+**

	<b>Less than HS degree</b>	<b>HS graduate or equivalent</b>	<b>Some college</b>	<b>Associate's degree</b>	<b>Bachelor's degree or higher</b>
<b>Lake</b>	13.9%	38.4%	28.0%	10.4%	23.2%
<b>Marin</b>	7.1%	9.9%	16.6%	7.0%	59.5%
<b>Mendocino</b>	15.9%	26.1%	24.9%	8.1%	25.0%
<b>Napa</b>	16.0%	17.8%	19.3%	9.1%	37.8%
<b>Solano</b>	10.9%	23.8%	25.8%	10.2%	29.4%
<b>Sonoma</b>	11.0%	18.7%	22.6%	9.3%	38.3%
<b>California</b>	15.5%	20.7%	19.7%	7.9%	36.1%

Source: 2021 American Community Survey

Compared to 2019 (before the COVID-19 pandemic), the level of educational attainment in some areas of the region has risen. Between 2019 and 2021, the percentage of the population with a baccalaureate degree or higher rose in every county in the region. In Sonoma, the percentage of the population with a baccalaureate degree or higher rose from 34.1% in 2019 to 38.3% in 2021. In Lake, this figure increased even more dramatically, from 15.7% to 23.2%. These increases exceed the trend for the state, in which the percentage of the population

with a baccalaureate degree or higher rose from 35% in 2019 to 36.1% in 2021. Middle skill attainment levels are highest in Lake (38.4%) and Solano (36.0%).

Within the RPU, approximately 163,188 individuals speak English less than very well, and 275,906 individuals were born outside of the United States. The region overall has lower percentages of limited English-speaking individuals than the state figure of 17.4%. Napa County has the highest percentage in the region who speak English “less than very well,” at 15.8%. Spanish is the most commonly spoken language in the region’s LEP households. Solano has the highest foreign-born population in the region at 91,584 individuals. Given this large population, it has the largest population speaking another language other than Spanish at home. In fact, Solano has double the number of individuals than of any other workforce board service area speaking Asian languages, including Tagalog, Chinese, and Farsi.

**Table 3. Language Spoken & English Proficiency**

	<b>Individuals that speak English less than "very well"</b>	<b>Percentage of LEP individuals</b>	<b>Foreign-born population</b>	<b>Spanish speaking</b>	<b>Other language</b>
<b>Lake</b>	4,410	6.80%	8,139	11.40%	1.10%
<b>Marin</b>	24,121	9.70%	50,821	7.10%	8.60%
<b>Mendocino</b>	7,686	8.90%	10,741	10.60%	2.90%
<b>Napa</b>	20,529	15.80%	31,322	16.70%	7.20%
<b>Solano</b>	51,955	12.20%	91,584	12.50%	13.10%
<b>Sonoma</b>	54,487	11.80%	83,299	11.20%	6.50%

Source: 2021 American Community Survey

## Commute Patterns

Housing and transportation infrastructure play an important role in how integrated the regional workforce can be. For example, Sonoma, Marin, Solano, and Napa Counties are all relatively well-connected by various freeways and highways. Mendocino and Lake Counties

are more challenged in terms of access to major labor markets and employers, outside of government or retail, due to distance.

Housing and transportation naturally link labor markets between county economies. People travel between the core counties daily; Mendocino and Lake Counties have more outflow of workers than inflow, much like any other rural areas that are adjacent to more populated areas. Solano County residents commute to the East Bay, San Francisco, and Sacramento, leading to the highest commute rate in the North Bay RPU. If the cost of housing is less expensive in the North Bay, and jobs pay more in the core Bay Area, people are willing to commute.

The majority (81.2%) of workers across counties work within their county of residence, with larger majorities in Marin, Mendocino, Napa, and Sonoma. Overall, this figure has risen since the COVID-19 pandemic; the regional average in 2019 was 76%. Higher out-county movement can be observed in Lake and Solano, with an overall regional commute time of 25.5 minutes (down from 28 minutes in 2019). As of 2021, a substantial minority of the population in the region works from home (38.3%). In Marin, this population is particularly prominent, with over half of residents working from home.

**Table 4. Commute Patterns for Workers over 16**

	<b>Work in county of residence</b>	<b>Work from home</b>	<b>Average commute time (minutes)</b>
<b>Lake</b>	79.1%	29.7%	26.5
<b>Marin</b>	83.5%	52.4%	24.9
<b>Mendocino</b>	89.2%	25.4%	18.2
<b>Napa</b>	81.6%	44.5%	25.9
<b>Solano</b>	66.9%	37.8%	31.4
<b>Sonoma</b>	87.1%	40.2%	26.3
<b>Regional Average</b>	81.2%	38.3%	25.5

Source: 2021 American Community Survey

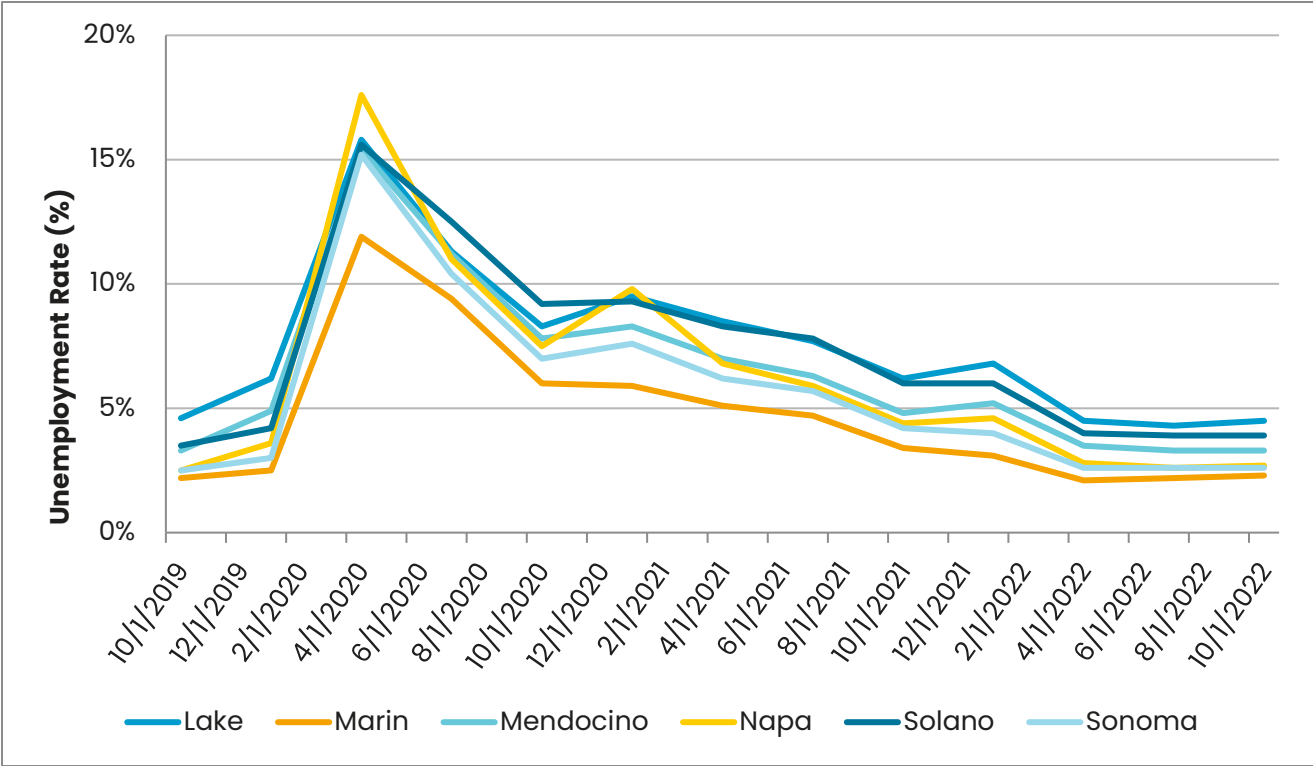
# Labor Force Overview

Given the large size of the RPU and the demographic profile of the labor force, the local economic drivers vary significantly throughout the region. Sonoma is the most populous county with 488,863 residents and 247,600 in the labor force, and Lake County is the least populous county, with 68,123 residents and 28,330 in the labor force.

# Unemployment and the COVID-19 Pandemic

The COVID-19 pandemic significantly impacted unemployment rates across the region in Spring of 2020, with the highest rates of unemployment reaching over 15% in April 2020. Napa had the largest spike in unemployment, with its unemployment rate reaching 17.6% in April 2020, up from 3.6% just three months earlier. Rates then gradually declined over the course of 2020 and 2021, leveling out by the middle of 2022. Figure 7 below demonstrates the trends in unemployment, by county, between late 2019 and late 2022, to illustrate the dramatic impact of the COVID-19 pandemic, and the labor market’s subsequent recovery.

**Figure 7. Unemployment Rates, COVID-19 Impacts**



Source: Employment Development Department (EDD) Labor Market Information Division (LMID)

By the end of 2022, unemployment rates returned to comparable levels to the end of 2019 (i.e. before the pandemic). Table 5 summarizes numbers employed and unemployed, as well as the unemployment rate in each county, as of November 2022.

**Table 5. Employment & Unemployment**

	<b>Labor force</b>	<b>Employed</b>	<b>Unemployed (#)</b>	<b>Unemployed (%)</b>
<b>Lake</b>	28,330	26,850	1,480	5.2%
<b>Marin</b>	128,400	125,300	3,200	2.5%
<b>Mendocino</b>	37,550	36,080	1,470	3.9%
<b>Napa</b>	67,700	65,500	2,100	3.2%
<b>Solano</b>	200,100	191,600	8,500	4.3%
<b>Sonoma</b>	247,600	240,500	7,100	2.9%

Source: EDD LMID, November 2022

Lake had the highest unemployment rate in the North Bay RPU at 5.2%, followed by Solano County at 4.3%. Solano had the highest volume of unemployed at 8,500, followed by Sonoma County at 7,100.

As illustrated in Table 6, some industries and some counties were more heavily impacted than others by reductions in employment following the onset of the COVID-19 pandemic. Sonoma saw the largest overall reduction in employment between December 2019 and December 2021, with 9,700 jobs lost. The industry with the largest job losses during this period was Leisure & Hospitality, with 10,690 jobs lost in total throughout the RPU.

**Table 6. Change (%) in Industry Employment, NBEC Counties and California, Dec. 2019 to Dec. 2021**

<b>Industry</b>	<b>Napa</b>	<b>Sonoma</b>	<b>Marin</b>	<b>Lake</b>	<b>Mendocino</b>	<b>Solano</b>	<b>California</b>
<b>Total farm</b>	-	(900)	(700)	-	(220)	(130)	(1,950)
<b>Total nonfarm</b>	(4,500)	(8,800)	(4,200)	(4,800)	(60)	(1,970)	(24,270)

Construction	(300)	1,500	(800)	400	30	150	980
Manufacturing	(100)	(500)	(500)	500	(30)	(120)	(750)
Wholesale trade	(200)	(300)	(100)	(100)	-	-	(700)
Retail trade	500	(300)	300	(900)	150	(100)	(350)
Transportation, warehousing, & utilities	700	300	(200)	100	230	210	1,340
Information	(300)	(300)	(100)	-	(20)	(40)	(760)
Financial activities	(100)	(900)	(300)	(100)	(20)	(50)	(1,470)
Professional & business services	(300)	(900)	500	700	30	(60)	(30)
Educational & health services	1,200	(2,400)	(300)	(800)	(120)	(300)	(2,720)
Leisure & hospitality	(3,300)	(2,700)	(1,500)	(2,100)	(20)	(1,070)	(10,690)
Other services	(400)	(900)	(300)	(800)	(20)	(100)	(2,520)
Government	(1,900)	(1,400)	(900)	(1,700)	(270)	(490)	(6,660)
<b>Total Changes</b>	<b>(4,500)</b>	<b>(9,700)</b>	<b>(4,900)</b>	<b>(4,800)</b>	<b>(280)</b>	<b>(2,100)</b>	<b>(26,280)</b>

Source: EDD, EFA, NEED via Economic Forensics and Analytics (EFA) NBEC Report, 2022

As the region recovers from the pandemic, employment demand by occupational group has also shifted.

Table 7 outlines the occupational groups with the highest demand for 2022–2025. Healthcare Support is the most in-demand occupational group for all but one county in the region (Napa). In Napa, Community and Social Service is the most in-demand occupational group.

**Table 7. Post-Pandemic Occupational Categories Forecasted to Have the Most Demand by NBEC County, 2022–2025.**

Lake	Marin	Mendocino	Napa	Solano	Sonoma
Healthcare Support	Healthcare Support	Healthcare Support	Community and Social Service	Healthcare Support	Healthcare Support
Healthcare Practitioners and Technical	Life, Physical, and Social Science	Transportation and Material Moving	Arts, Design, Entertainment, Sports, and Media	Community and Social Service	Construction and Extraction
Transportation and Material Moving	Farming, Fishing, and Forestry	Business and Financial Operations	Computer and Mathematical	Management	Healthcare Practitioners and Technical
Sales and Related	Building and Grounds Cleaning and Maintenance	Architecture and Engineering	Healthcare Support	Business and Financial Operations	Protective Service
Business and Financial Operations	Production	Legal	Business and Financial Operations	Transportation and Material Moving	Community and Social Service

Source: EFA NBEC Report, 2022

Local economic indicators and land purchases also indicate that climate transition and biomanufacturing industry and occupational clusters are emerging in the North Bay RPU as a direct result of natural disasters and the development of the California Biomanufacturing Center in Vacaville.

## Underemployment

An examination of Lightcast data allows for a comparison of the required educational level for available jobs to the education level of the population overall. An analysis for the North Bay finds that there are a greater number of jobs requiring minimal education (a high school diploma or less), compared to the education level of the labor force – in other words, more low skilled jobs than workers – and there are more people with some higher education (some college, associate’s degrees, and graduate degrees or higher) than jobs that require them.

**Table 8. Job Openings by Educational Level (2018–2028)**

<b>Educational Requirement</b>	<b>Number of Projected Job Openings</b>
No formal educational credential	277,610
High school diploma or equivalent	185,330
Bachelor's degree	84,650
Postsecondary non-degree award	44,120
Some college, no degree	18,900
Associate's degree	12,220
Master's degree	11,690
Doctoral or professional degree	9,520

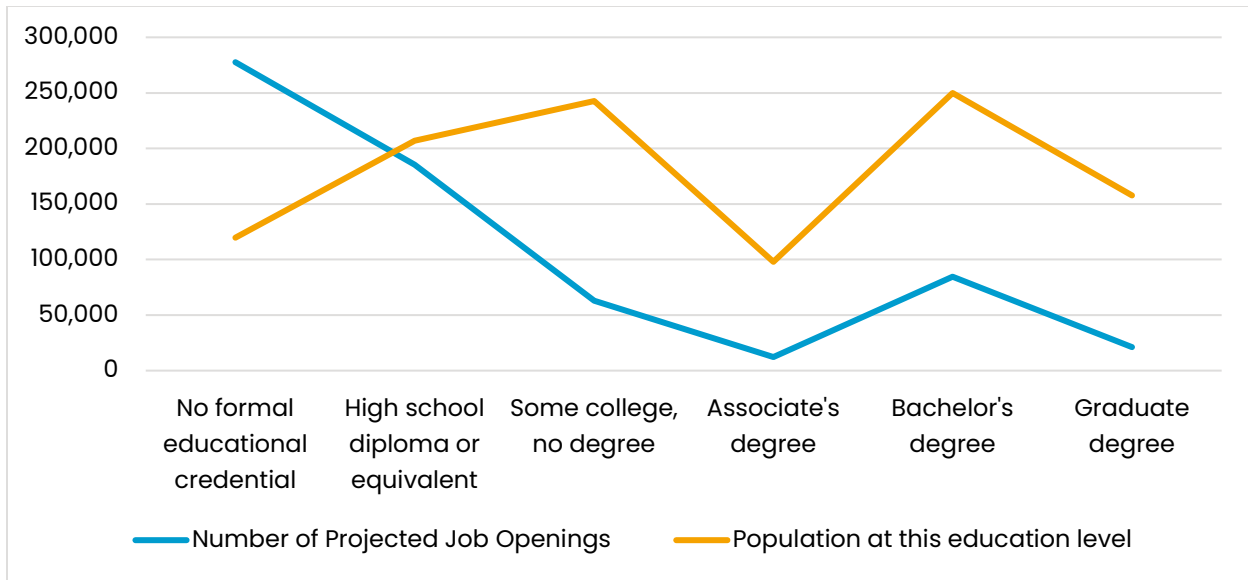
Source: Lightcast Q4 2022 Data Set<sup>7</sup>

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<sup>7</sup> [www.economicmodeling.com](http://www.economicmodeling.com)



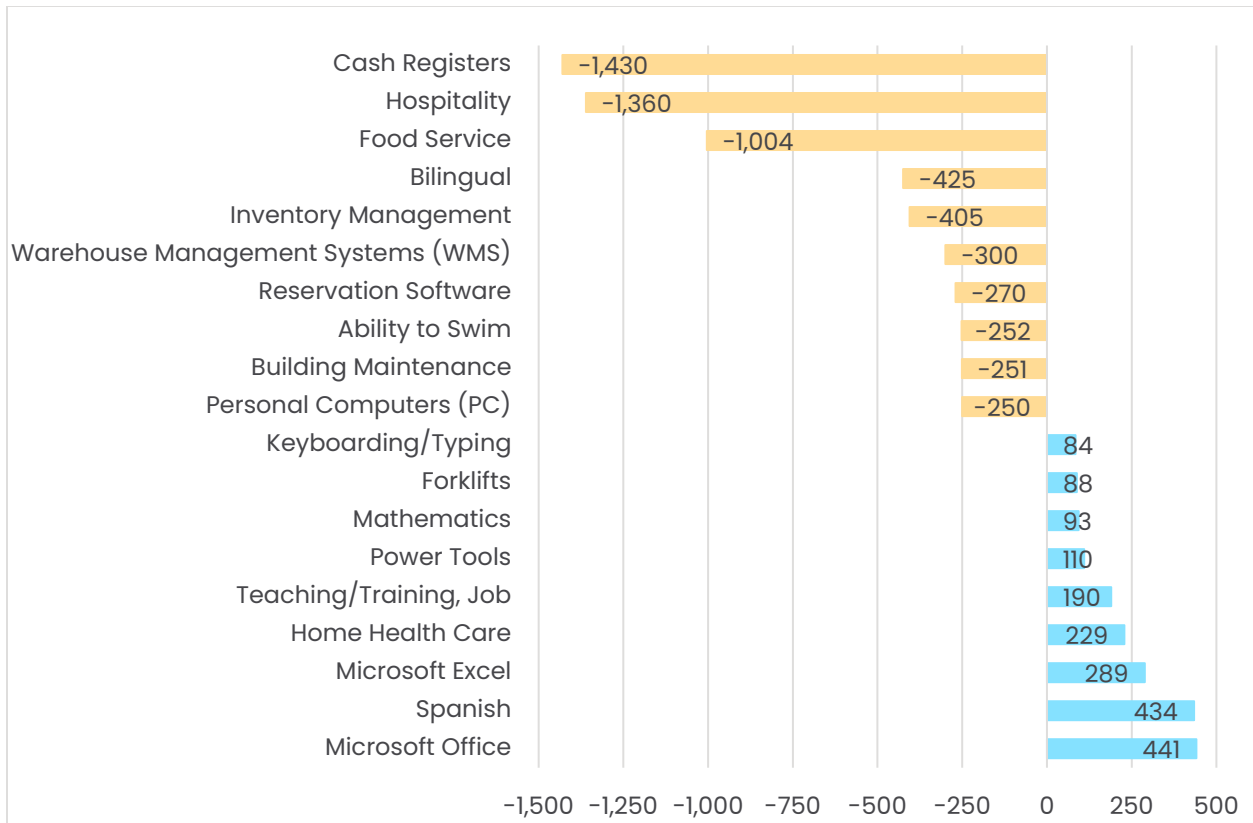
**Figure 8. NBEC Job Openings & Population by Education Level**



Source: EDD LMID, Occupational Employment Statistics (OES) and Occupational Employment Projections 2018-2028

A skill gap is defined as the difference between the supply and demand for a skill. Positive gaps are surpluses of a skill and negative gaps represent a shortage of a skill. Skill supply (candidates) is collected from resume data; demand (openings) is collected from job postings. Figure 9 illustrates a skills gap analysis for the North Bay region, using Jobs EQ data from 2022.

**Figure 9. Skills Gaps: Total – All Occupations, NBEC**



Source: JobsEQ®, Q2 2022

## Skills Needed

Dr. Rob Eyler, a professor of economics at Sonoma State University and the President of Economic Forensics and Analytics Inc (EFA), prepared an analysis of gaps between forecasted demand for employment and skill and educational levels of residents, in May 2022. Beginning with the industries with the highest projected demand, Dr. Eyler reported in Table 9 the projected growth in specific occupations and their corresponding skills levels. The following definitions were used for each skill level (low, medium, and high) and type:

- Low-skill jobs are defined as those for which just a high-school diploma or equivalency degree (GED, e.g.) is needed and, in some cases, not even a high-school diploma;
- Middle-skill jobs are defined as those that require certification or an associate degree beyond a high-school diploma or equivalency to qualify for such a job;
- High-skill jobs are those for which a bachelor's or higher degree is needed to qualify;

- Low, middle, and high skills depend on educational or training levels based on the Standard Occupational Classification (SOC) code information for education/training level;
- Technical skills are specific to a software package, machine, or other technology that is used to perform a job; and
- Soft skills are interpersonal or behavioral skills that workers need.

**Table 9. Top 20 Occupations Growth in NBEC Region and California, 2021–2025, Growth of Jobs, Skill Level for NBEC Top–20 Occupations**

<b>Occupation</b>	<b>NBEC Growth of Jobs</b>	<b>Skills Level</b>	<b>CA Growth of Jobs</b>
Home health and personal care aides	5,625	Middle	177,673
Fast food and counter workers	796	Low	43,976
Maids and housekeeping cleaners	612	Low	27,617
Security guards	603	Low	23,035
Registered nurses	595	High	22,501
Passenger vehicle drivers, except bus drivers, transit and intercity	585	Low	21,941
Construction laborers	563	Low	13,618
Heavy and tractor-trailer truck drivers	557	Middle	13,383
Nursing assistants	449	Middle	12,567
Medical and health services managers	420	High	11,400

General and operations managers	404	High	10,849
Substance abuse, behavioral disorder, and mental health counselors	389	High	10,607
Industrial machinery mechanics	376	Low	10,340
Medical assistants	368	Middle	9,201
Laborers and freight, stock, and material movers, hand	341	Low	8,891
Electricians	323	Low	8,596
Licensed practical and licensed vocational nurses	295	Middle	8,533
Social and human service assistants	286	Low	8,186
Animal caretakers	285	Low	8,076
Software developers and software quality assurance analysts and testers	274	High	7,379

Source: EDD, EMSI, EFA and NEED via EFA NBEC Report, 2022

An analysis of the top 20 growth occupations in the North Bay RPU shows a predominance of low-skilled and/or low-wage jobs. An occupation of particular focus for the region is home health and personal care aides. This occupation has a growth seven times higher in volume than the next highest occupational growth. It requires occupational training and certification, yet does not provide, on average, a family-sustaining wage. As a result, the North Bay RPU

has selected this occupation as a regional focus for joint job quality initiatives such as the CNA Upskilling Program, funded through Accelerator 10.0. This initiative aims to assist those working in low paid home health and person care aide roles to move into CNA careers, which offer better wages and more long-term stability.

Aggregating these findings, Table 10 summarizes the projected growth/decline of jobs by skill level across the region and the state.

**Table 10. Growth of Jobs by Skill Level (Low, Medium, and High), 2021–2025, NBEC Region and CA**

<b>Skill Level</b>	<b>New NBEC Jobs 2019 – 2025</b>	<b>New CA Jobs 2019–2025</b>	<b>NBEC % Change 2019–25</b>	<b>CA % Change 2019–25</b>
Low	-34,142	-653,401	-7.6%	-5.3%
Middle	-3,391	-39,168	-4.8%	-1.9%
High	-3,081	181,006	-1.9%	3.3%
<b>Totals</b>	<b>-40,614</b>	<b>-511,563</b>	<b>-5.9%</b>	<b>-2.6%</b>

Source: EDD, EMSI, EFA, and NEED via EFA NBEC Report, 2022

This table shows that low-skilled jobs are forecasted to show the largest level of decline in the North Bay RPU, at a rate above the state average. This will likely impact the scope of talent for small businesses in industries such as hospitality and other services. On the other hand, this high rate of low-skilled job decline will potentially leave low-wage workers more vulnerable to future economic shifts and recessions.

According to Eyer, “The literature on skills, occupations, and employment in the wake of the pandemic suggest that, through the 2020s, more workers will be needed with STEM (science, technology, engineering, and mathematics) and soft skills. Problem solving and critical thinking, as well as time and project management, are skills specifically mentioned in forecasts up to 2025.” Specifically, the following STEM-related skills are likely to be in demand:

- STEM-Related
  - Analytical thinking and innovation oriented
  - Complex problem solving
  - Technology design and programming

- Technology use, monitoring and control
- Soft Skills
  - Critical thinking
  - Problem solving
  - Self-management
  - Working in teams

## B. Fostering Demand-Driven Skills Attainment

- Identify the in-demand industry sectors or occupations for the region.
- Describe how the RPU and regional partners will expand or develop, and then implement sector initiatives for those in-demand industry sectors or occupations.

The largest industries in the North Bay RPU by volume of individuals employed (as of 2020 annual data) are:

1. Education and Health Services
2. Trade, Transportation and Utilities
3. Leisure and Hospitality
4. Professional and Business Services
5. Manufacturing
6. Construction

Table 11 includes the top occupations in demand for the region by number of projected job openings (for 2018-2028) along with their annual wages as of 2022.

**Table 11. Top Occupations (2018-2028)**

<b>Standard Occupational Classification and Occupational Title</b>	<b>Total Openings</b>	<b>Median Hourly Wage</b>	<b>Median Annual Wage</b>
31-1120: Home Health and Personal Care Aides	40,665	\$15.99	\$33,261

35-3023: Fast Food and Counter Workers	32,762	\$17.16	\$35,709
41-2011: Cashiers	31,888	\$16.70	\$34,723
35-3031: Waiters and Waitresses	27,013	\$16.62	\$34,580
41-2031: Retail Salespersons	26,779	\$17.37	\$36,137
45-2092: Farmworkers and Laborers, Crop, Nursery, and Greenhouse	17,683	\$17.87	\$37,177
35-2014: Cooks, Restaurant	15,101	\$19.40	\$40,359
37-2011: Janitors and Cleaners, Except Maids and Housekeeping Cleaners	13,510	\$18.25	\$37,952
53-7062: Laborers and Freight, Stock, and Material Movers, Hand	13,414	\$18.50	\$38,462
53-7065: Stockers and Order Fillers	12,114	\$18.20	\$37,866
43-9061: Office Clerks, General	11,581	\$21.38	\$44,466

Source: EDD LMID, Occupational Employment Statistics (OES) and Occupational Employment Projections 2018-2028

As shown above, the occupations with the highest numbers of projected job openings are all low wage positions, all falling below the \$21.82 per hour estimated living wage for the state of California overall for a single adult without children.<sup>8</sup>

Table 12 includes the top middle-skill occupations in demand for the region. These occupations have the highest projected long-term job openings for jobs in this skill level.

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<sup>8</sup> <https://livingwage.mit.edu/states/06>

Middle skill is defined here as having entry level educational requirements, including Associate's Degree, Postsecondary Non-Degree Award (Certificate), and Some College. On average, middle skill jobs, including those below, provide a living wage when considering an individual adult without children.

**Table 12. Top Middle Skill Occupations**

<b>Standard Occupational Classification and Occupation Title</b>	<b>Rank for Region</b>	<b>Total Openings</b>	<b>Median Hourly Wage</b>	<b>Median Annual Wage</b>
43-3031: Bookkeeping, Accounting, and Auditing Clerks	1	8,948	\$24.78	\$51,556
25-9045: Teaching Assistants, Except Postsecondary	2	6,940	**	\$39,703
53-3032: Heavy and Tractor-Trailer Truck Drivers	3	6,366	\$25.67	\$53,384
31-9092: Medical Assistants	4	5,618	\$25.62	\$53,294
31-1131: Nursing Assistants	5	5,306	\$19.49	\$40,528
31-9091: Dental Assistants	6	3,140	\$24.54	\$51,053
25-2011: Preschool Teachers, Except Special Education	7	3,081	\$18.50	\$38,486
49-3023: Automotive Service Technicians and Mechanics	8	2,964	\$28.02	\$58,285
39-5012: Hairdressers, Hairstylists, and Cosmetologists	9	2,450	\$17.37	\$36,132
29-2061: Licensed Practical and Licensed Vocational Nurses	10	2,299	\$34.09	\$70,925



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\*\*There is wide variation in hours worked. It is not feasible to calculate an annual wage.

Source: EDD LMID, Occupational Employment Statistics (OES) and Occupational Employment Projections 2018–2028

EFA conducted qualitative research to add to the above quantitative findings regarding target industries for job growth. Specifically, interviews were conducted with representatives of the following industries, which have experienced significant or prolonged job losses in the wake of the COVID-19 pandemic:

- Healthcare;
- Leisure and hospitality;
- Construction;
- Agriculture, wine, and cannabis;
- Manufacturing; and
- “Other services.”

Qualitative findings include the following major themes:

- Wages might still be too low to motivate workers to take the jobs currently offered, based on a mixture of the rising cost of living, increasing concerns about child/dependent care, and uncertainty about worker safety;
- Across all occupations and industries, technology-trained workers are needed;
- Finding skilled educators is a general problem in K–14 education across all six counties, with some differences in career technical education (CTE);
- Many of the NBEC region’s workforce development partners can partner with one another (especially at the county level) to create student/employee tracks that will fit region needs.

Seven sectors (or industry clusters) were identified as having a particularly prominent role in the economy of the North Bay RPU, in terms of projected employment growth for the future:

1. Healthcare and Social Assistance
2. Government
3. Retail Trade
4. Accommodation and Food Services
5. Manufacturing
6. Construction
7. Hospitality

After synthesizing quantitative and qualitative findings, the North Bay RPU chose to focus on the following sectors for its regional plan – and continues to focus on these sectors as of this

update – because of both the need to support recuperation from the sustained impacts on these industries of the COVID-19 pandemic and the availability of middle skill jobs with good wages and projected growth:

- Healthcare and Social Assistance
- Manufacturing
- Construction
- Hospitality

## Regional Industry Strategies

The RPU and its partners have undertaken efforts to support priority sectors and/or occupations through a number of strategies.

### **Healthcare and Social Assistance strategies:**

- Certified Nursing Assistant (CNA) upskilling: All the WDBs in the region are partners on an accelerator 10.0 grant from the California Workforce Development Board to provide incumbent worker training tied to wage increases with skilled nursing facilities in the region. This project is an effort to enhance the job quality of the region’s highest growing occupation.
- Sonoma County is establishing an additional Healthcare Career Pathway program focused on CNA certification. This program provides 303 training hours in both classroom and clinical/work-based settings to participants. The program is a coordinated partnership between the Adult Education Consortium, AJCC (Job Link) and three skilled nursing facility employers.

### **Hospitality strategies:**

- In Napa County, the Hospitality Industry Partnership is led by lodging and restaurant employers and supported by a range of community partners.
- Solano County, in partnership with the Vallejo Regional Educational Center, is currently running a program for culinary training, coordinating cohorts of trainees with local employers.

### **Construction and Climate Transition strategies:**

- In a partnership of the North Coast Builders’ Exchange, County of Sonoma Climate & Resiliency Division and the WDB/AJCC (Job Link), Sonoma County WDB is developing an Electric Vehicle Infrastructure Training Program (EVITP). This training will be aimed

at building capacity in the existing electrical manufacturing workforce to meet anticipated increase in demand due to local and national policies/building code changes regarding electrification.

- Solano County is working with Solano Land Trust and Solano County Office of Education, as well as other partners, to develop a climate transition career awareness and work-experience summer program for youth ages 16–24.

**Manufacturing strategies:**

- In Solano County, the WDB piloted a program in 2022 to provide work-and-learn placements within advanced manufacturing and biomanufacturing settings.

**Childcare strategies:**

- Solano and Napa Counties are collaborating with local Family and Children Services entities and the Solano-Napa Small Business Development Center to launch training cohorts in both English and Spanish to increase the availability of licensed family childcare providers.
- Sonoma County is also working to develop the childcare workforce. In partnership with Santa Rosa Junior College and Head Start, the AJCC is working to recruit students into Early Childhood Education coursework and to co-enroll in WIOA Title I services. The intention is to provide concrete supportive services to attract and retain students who might otherwise have barriers to employment to complete training in this field.

All the WDBs in the region are coordinating on an upcoming Regional Equity (RERP) grant, through which the RPU will partner with local community colleges on key industry sectors, determined by county, and aligned with the regional priority industries and occupations.

## C. Enabling Upward Mobility for All Californians

- Describe how the RPU will prioritize working with employers who provide quality jobs that provide economic security through family-sustaining wages and comprehensive benefits. This should include whether the RPU has, or plans to develop, a formal policy related to job quality.
- Describe how the RPU and regional partners will work together to identify shared target populations and develop targeted service strategies.
- Describe how the RPU and regional partners will work with employers and training providers to ensure that historically unserved and underserved communities have equal access to the regional sector pathways, earn and learn opportunities, supportive services, and other approaches identified by the RPU. This should include whether the RPU has, or plans to develop, a formal policy related to equity.

NBEC continues to prioritize employers who provide quality jobs in its priority sectors. These sectors as stated earlier are:

- Healthcare and Social Assistance
- Manufacturing
- Construction
- Hospitality

These sectors were identified given they offer family-sustaining wages and comprehensive benefits, are accessible to job seekers of varying education levels, and contain career ladders that allow for progression through greater training and develop economic security. The RPU keeps job quality central to its work. While the RPU has not developed a formal policy on job quality, the RPU's WDBs work collaboratively to prioritize industries, occupations, and initiatives that promote jobs that are sustainable, offer living wages and benefits, and can lead to long term career stability for individuals. The region demonstrates its value for high quality jobs through its initiatives. One example of this is the Certified Nursing Assistants (CNAs) UpSkilling Program (CUSP) that the North Bay has prioritized. In addition to being in a priority industry, the CUSP program addresses the low wages among CNAs and establishes pathways to micro-credentials and wage increases. As part of this initiative, the region is developing a job quality framework that can guide future endeavors with employers in the region.

As part of the labor market and community data analysis conducted by Dr. Eyler for the North Bay RPU, impacts of COVID-19 on various population groups in the North Bay were identified.

The definition of “vulnerable” for purposes of the analysis is a household with the following characteristics:

- Female head of household (HH); or
  - Household has at least one dependent (child under 18 or adult over 65) who is under the age of 65 with no other adults below 65; or
  - BIPOC person as the head of household;
- Household income of less than 200% of the federal poverty level in 2012 in adjusted dollars in 2019; or
- At least one person in the household has no health insurance.

Using this definition of vulnerability, Solano, Lake and Mendocino Counties have the largest vulnerable populations within the NBEC region. Both Sonoma and Marin Counties are not shown because they have fewer vulnerable households than the NBEC average. As seen Table 13 below, Lake, Mendocino, and Solano Counties are “vulnerable” in terms of having households with females as the prime income earners, more BIPOC households, households with more dependents (and thus less work-time flexibility), and lower-income households. Napa County is slightly more vulnerable than Sonoma and Marin Counties. For the NBEC region’s BIPOC communities, job losses might also be structural, in that the industries that lost the most jobs during the pandemic and more highly represented by BIPOC workers, might not recover the volume they had before the pandemic for years to come.

**Table 13. Vulnerability, NBEC Counties and Region, Selected Counties in California  
Vulnerability Index as Weighted Average of Criteria, 2019**

	<b>BIPOC HH</b>	<b>Female HH</b>	<b>At least 1 Dependent</b>	<b>In Poverty</b>	<b>Uninsured HH</b>	<b>Vulnerable Population</b>
<b>NBEC</b>	21.8%	9.3%	64.3%	3.1%	17.2%	10.9%
<b>Solano</b>	37.8%	11.2%	71.4%	2.7%	15.2%	14.6%
<b>Lake</b>	19.1%	10.8%	59.9%	2.5%	24.4%	13.2%
<b>Mendocino</b>	19.1%	10.8%	59.9%	2.5%	24.4%	13.2%
<b>Napa</b>	18.3%	7.9%	64.1%	5.3%	19.2%	11.1%

Source: ACS 5-Year PUMS, NEED, EFA via EFA NBEC Report, 2022

Table 14 further shows which jobs were lost or shifted between BIPOC workers and non-BIPOC workers between 2011 and 2019. The white non-Hispanic workforce grew by 5.5% whereas the BIPOC workforce grew by 35.9%.

**Table 14. Share of Job Losses Experiences by BIPOC Workers by Occupation – Marin, Napa, Sonoma, and Solano Counties Only**

Occupation	Total Employment		Jobs Lost	Share (%) BIPOC	BIPOC Jobs Lost
	2019	2020			
Management	24,000	23,850	-150	25.7%	-72
Business and financial operations	18,900	19,690	790	29.9%	132
Computer and mathematical	5,660	5,590	-70	35.0%	77
Architecture and engineering	6,120	5,310	-810	31.2%	-265
Life, physical, and social science	4,550	4,340	-210	26.2%	-102
Community and social service	7,670	7,780	110	38.4%	515
Legal	1,700	1,270	-430	21.3%	-53

Educational instruction and library	24,640	22,900	-1,740	27.6%	-701
Arts, design, entertainment, sports, and media	3,710	3,380	-330	24.4%	-154
Healthcare practitioners and technical	24,820	26,000	1,180	38.8%	334
Healthcare support	25,370	24,770	-600	54.8%	-553
Protective service	9,600	9,060	-540	42.0%	-399
Food preparation and serving related	45,460	36,510	-8,950	55.1%	-5,268
Building and grounds cleaning and maintenance	14,410	13,280	-1,130	73.6%	-773
Personal care and service	11,330	8,790	-2,540	47.6%	-1,880
Sales and related	46,460	41,650	-4,810	40.6%	-1,945

Office and administrative support	48,450	44,100	-4,350	40.5%	-2,155
Farming, fishing, and forestry	7,760	7,410	-350	86.3%	-276
Construction and extraction	26,810	24,790	-2,020	52.9%	-1,460
Installation, maintenance, and repair	14,890	14,110	-780	41.2%	-190
Production	24,210	21,780	-2,430	55.4%	-1,379
Transportation and material moving	30,590	29,070	-1,520	55.9%	-1,191

Source: ACS 5-Year PUMS, NEED, EFA via EFA NBEC Report, 2022

Based on this data, the RPU has worked collectively to identify target populations that represent the most vulnerable households in their communities. For the North Bay, these vulnerable populations include single parents, individuals with disabilities, and CalFresh recipients. Through its RPI 4.0 funds, the North Bay identified these same populations for developing a dashboard to track disaggregated WIOA outcomes for equity measures. In fact, the North Bay has been ahead of the curve in developing a dashboard which prioritizes job quality and equity. The RPU will use the MIT living wage calculator as the benchmark for measuring success after exit of programs. By establishing this dashboard, the RPU will be able to determine if residents in targeted populations have advanced as a result of WIOA supports, as well as identify opportunities for system improvements.

The RPU has partnered with a number of employers and training providers, particularly trade groups and unions, that serve historically unserved and underserved communities. These partners align with the key sectors identified earlier. In particular:



## Solano WDB

- **Buttons:** Provides industrial transportation of equipment.
- **County and Cities** as employers
- **Factory OS:** Builds lower cost multifamily modular housing.
- **Goodwill Industries:** Provides job training programs. (Serves all WDBs)
- **Michaels' Transportation:** Providing school bus transportation, charter bus rentals, shuttles and limousine service. (Serves Solano WDB and WANB)
- **Napa-Solano Building Trades Council:** Supports building and construction trades councils and unions in Napa and Solano. (Serves Solano WDB and WANB)
- **Napa-Solano Central Labor Council:** Supports 50 union affiliates in Napa and Solano Counties. (Serves Solano WDB and WANB)
- **Paradise Valley Estates:** key employer partner on the CNA Upskilling Program

## Sonoma WDB

- **Blentech Corporation:** Develops food processing equipment.
- **Goodwill Industries:** Provides job training programs. (Serves all WDBs)
- **Keen Garage Door:** Provides garage door services.
- **MOGA Transport:** Provides truck transportation.
- **North Bay Labor Council:** Represented some 70 union affiliates in Sonoma, Lake, Mendocino and Marin Counties. (Serves Sonoma WDB and WANB)
- **North Bay Building Trades:** Supports building and construction trades in Marin, Sonoma, Lake and Mendocino Counties. (Serves Sonoma WDB and WANB)
- **Petaluma Health Center:** Provides health centers and clinics in Sonoma County.
- **Pauline's Automotive:** Provides auto-repair and maintenance services.
- **Sonoma Family Meals:** Meal support to those in need.
- **Wine Country Computers & Technology Inc.:** Provides network management and consulting services.

## WANB

- **Adventist Health:** Provides healthcare services
- **Canal Alliance:** Workforce partner and employer
- **Chambers**
- **Community Action Marin:** Workforce partner and employer
- **County and Cities** as employers
- **Goodwill Industries:** Provides job training programs. (Serves all WDBs)
- **Michaels' Transportation:** Providing school bus transportation, charter bus rentals, shuttles and limousine service. (Serves Solano WDB and WANB)

- **Napa-Solano Building Trades Council:** Supports building and construction trades councils and unions in Napa and Solano. (Serves Solano WDB and WANB)
- **North Bay Building Trades:** Supports building and construction trades in Marin, Sonoma, Lake and Mendocino Counties. (Serves Sonoma WDB and WANB)
- **Napa -Solano Central Labor Council:** Supports 50 union affiliates in Napa and Solano Counties. (Serves Solano WDB and WANB)
- **North Bay Labor Council:** Represented some 70 union affiliates in Sonoma, Lake, Mendocino and Marin Counties. (Serves Sonoma WDB and WANB)
- **Salvation Army:** Provides job training programs.
- **School Districts:** Workforce partner and employer

In addition, the RPU collectively works with North Bay Trades Introduction Program (TIP). TIP is an MC3 pre-apprenticeship program that prepares students entry into for careers in the trades. The program provides education and skills training to anyone interested in pursuing an apprenticeship in one of 14 building trade unions. The training increases students' skill in construction, math, drafting, drawing, work readiness, and job safety, while developing relationships with the North Bay building trades industry and making them much more viable candidates for union apprenticeship.

The North Bay was also a strong collaborator for the Prison to Employment (P2E) grant program. The P2E program provided funding for workforce, reentry services, and supportive services, paving a pathway towards employment and away from recidivism for the formerly incarcerated and justice involved population. This community has been especially unserved and the RPU was able to enroll 83 participants in the program to receive training and/apprenticeships.

Beyond collaboration with employers and trades/unions, the North Bay continues to collaborate with a number of community-based organizations that have a strong pulse on historically unserved and/or BIPOC neighborhoods and communities throughout the North Bay. These CBOs traditionally provide wrap-around support for vulnerable populations including in language support. Below is an extensive list of the CBOs NBEC currently works with:

- California Human Development
- California Indian Manpower Consortium, Inc., CIMC
- Caminar
- Canal Alliance
- Career Service Provider (Lake and Mendocino Counties)
- Center for Employment Opportunities

- Center for Social and Environmental Stewardship
- CenterPoint
- CEO Works (Center for Employment Opportunities)
- Community Action Marin
- Community Action Partnership – Solano
- Community Action Partnership of Sonoma County
- California Conservation Corps North Bay
- COTS (Committee on the Shelterless)
- Dreamcatchers
- Felton Institute
- Fighting Back Partnership
- Goodwill Industries of the Redwood Empire
- Goodwill Industries of San Francisco
- Hispanic Chambers of Commerce
- Homeward Bound of Marin
- Housing and Economic Rights Advocates (HERA)
- Interfaith Shelter Network
- Legal Services of Northern California
- Marin City Community Development Corporation
- Marin Fire Foundry
- Mendocino County Youth Project
- Mission Samoa
- Napa Learns
- North Coast Opportunities, Inc.
- Petaluma People's Services
- Redwood Quality Management
- Shelter, Inc.
- Social Advocates for Youth
- Solano Land Trust
- SparkPoint
- Spaulding Marine Center
- Vallejo Project
- VOICES
- West County Community Services
- YWCA

It is this work with employers, trades, unions, and CBOs that the RPU continues to prioritize to ensure equity remains a top priority as they serve unserved and underserved communities. In addition, many of the Workforce Boards' host organizations or partners in local government are developing their own equity initiatives or offices. As part of CUSP, the Solano WDB is developing a job quality framework to guide regional standards of job quality. In addition, the Sonoma WDB is in the process of developing an Equity Framework to address workforce board composition, ongoing training/learning of Board members and evaluating program data using anti-racist Results Based Accountability.

## D. Aligning, Coordinating, and Integrating Programs and Services

- Describe any regional service strategies, including use of cooperative service delivery agreements or MOU.
- Describe any regional administrative cost arrangements, including the pooling of funds for administrative costs for the region.

The NBEC RPU developed and executed a regional MOU in May 2018 which established norms for partnering and communicating as an RPU. Solano County will serve as the fiscal agent beginning in 2023, although each initiative is evaluated on a case-by-case basis. Non-fiscal agent WDBs are treated as sub-recipients for purposes of shared regional grants, unless otherwise required by statute. The directors agreed to work together on meaningful shared projects that add value and to always maintain local decision-making authority. Additional regional service strategies have previously been described in this plan, including a robust use of data, targeting services to priority sectors, and ensuring access for all groups by working closely with local community partners.

Although for a variety of logistical, practical, and political reasons NBEC has not established administrative cost sharing arrangements or other formalized structures for the RPU, the three WDB directors work together to ensure regional initiatives have a positive impact on the North Bay.

Funded by the Solano WDB, an external consulting agency, RDA Consulting was hired in 2021 to provide the following services to the RPU:

- Regional Partner Convening and Coordination;
- Regional Training Coordinator (RTC) Duties;
- Regional Organizer (RO) Services

Independently and through the work of the Regional Organizer (“RDA Consulting”), NBEC has engaged in these additional regional service strategies:

- Sector Initiatives: Shared efforts on industry sector initiatives and business services.
- Regional Leadership Meetings: At the regularly scheduled regional meetings, strategies are discussed and shared on a variety of policy issues, including best practices and how to address challenges in tracking and reporting performance outcomes. Additionally, WDB members or trainings and staff are invited to attend WDB meetings in other local areas within the region to hear about or discuss a topic of mutual interest.
- Data Sharing: WDB staff work collaboratively across boards in the collection and analysis of regional labor market data and on targeted regional initiatives.
- Premier Virtual job fair: The WDBs have collaborated to jointly fund a Premier Virtual job fair platform for the RPU. The virtual job fair is an online platform that allows the region to host virtual career fairs and hiring events.
- Grant Storytelling: WDBs worked with a publication company (N&R Publications) to create a series of stories highlighting the impact of the Prison 2 Employment (P2E) grant program and amplify the stories on social media.

In summary, NBEC continues to meet and exceed the federal requirements for regional planning. The WDBs of the North Bay will continue to work together to meet the needs of a post-pandemic labor market and will strive to provide the best possible services to their communities.