



WORKFORCE DEVELOPMENT SURVEY REPORT

WORKFORCE REPORT

2021



SONOMA COUNTY
 **WORKFORCE
INVESTMENT BOARD**

*Report developed by the Sonoma
County Economic Development Board
in partnership with the Sonoma County
Workforce Investment Board*

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EXECUTIVE SUMMARY

The 2021 Workforce Development Survey Report is intended as a **tool to align local workforce development efforts with employer needs**. Between natural disasters and COVID-19, businesses in Sonoma County have been presented with a number of unique and unprecedented challenges in 2020 that have carried over into 2021. This year's survey was divided into two parts; part 1 was mandatory and aimed to gather relevant data on workforce trends and sought to understand some of the immediate challenges and concerns facing Sonoma County's workforce development. Part 2 was optional and sought to understand the employment needs for organizations who are currently hiring or seeking to hire new employees, as well as assess some of the more general difficulties and challenges employers are facing. This 2021 report summarizes findings obtained from the collective input of over 150 Sonoma County organizations. Taken together, **these findings are used to evaluate current workforce realities and develop programs relevant to employers' needs and opportunities**. The findings below are particularly important in developing a strong, resilient workforce.

2021 KEY FINDINGS & OPPORTUNITIES

COVID-19 has led to a variety of challenges for employers and employees alike

42%
of respondents
experienced hiring
difficulties

78%
of respondents
are very concerned about
housing and living costs
for employees

Finding #1

Due to the challenges COVID-19 has presented, 53% of respondents reported their employees have had to adopt a wider range of skills and 47% of respondents reported employees having to adopt more responsibilities. 75% of respondents reported having businesses expenses that have remained unchanged throughout the pandemic, and of those surveyed who had to reduce positions, 67% of those reduced positions were positions with skills related to customer service.

Opportunity: The EDB and WIB have training resources and funding available to assist businesses facing challenges created from the pandemic. These resources directly address some of the challenges participants noted throughout the survey.

Action: Sonoma County Job Link has offered training dollars to employers in an effort to help retrain the existing workforce that has had to absorb additional skills and responsibilities. Not many businesses have used this resource and the services are still available for those who are interested. Additionally, there is still funding available for returning and new applicants from the \$2.5 million grant fund developed by the EDB, in addition to funding from the Coronavirus Aid, Relief, and Economic Security (CARES) Act and the Paycheck Protection Program (PPP) Loan.

Finding #2

Hiring difficulties often act as an impediment to potential economic growth. Of the businesses surveyed, 42% responded that they had experienced hiring difficulties. The top reasons for difficulties with hiring were lack of relevant work experience, insufficient number of applicants, lack of education credentials, and an unwillingness to return to work due to COVID-19 concerns or an unwillingness to stop receiving unemployment benefits.

Opportunity: Sonoma County has a diverse range of employers with a strong presence in manufacturing, healthcare, professional services, and other industries along with educational resources to help connect students with job opportunities.

Action: The EDB is working on talent attraction projects that will showcase and support Sonoma County's key organizations and industries. Through Strategic Sonoma, Sonoma County Connections, and other initiatives, key employers and community stakeholders are working together to address hiring challenges. Additionally, the EDB and WIB have partnered to offer free support services for local employers, including talent recruitment and retention.

Finding #3

In terms of how concerned businesses are with workforce issues, housing and living costs for employees ranks as the number one issue, with 78% of respondents expressing they were very concerned about this issue.

Opportunity: The EDB has developed an action plan seeking to implement a variety of strategies organized around the following categories: business recovery, workforce recovery, and community recovery.

Action: Through the [Economic Recovery Action Plan](#), the EDB is working to ensure that community members know how to access the comprehensive safety net services provided by multiple government agencies, nonprofit and faith-based organizations, and educational institutions throughout the county. Additionally, the EDB is working to address housing and transportation needs and seeking to develop a dedicated fund to support community residents who are unable to access existing safety net programs and explore options that provide rental support structures and assistance, including prioritizing the use of federal funds to keep people in their homes.



OPPORTUNITIES

KEY OPPORTUNITIES AND RESOURCES

Resources are available to help employers find qualified applicants.

- The **EDB** partners with the **WIB** to offer valuable, free support services for local employers, including talent recruitment and retention, customized employee trainings, specialized hiring events through Job Link, Sonoma County's One-Stop career center, and more.
- **Job Link** hosts monolingual and bilingual job fairs to help keep employers attuned to demographic shifts in Sonoma County and the rapid growth of the Latinx population. To meet employers' specialized needs, Job Link also provides **industry-specific job** fairs to spotlight critical industries and match employers with enthusiastic candidates that have the right skill sets.
- **Job Link's Team Workforce**, a multi-agency business-serving group, takes a coordinated approach to raise the visibility of employers' recruitment opportunities and to match job seekers with compatible employers.
- With **Sonoma County Connections**, an online talent attraction hub, the EDB is working to address concerns over the lack of qualified candidates in specialized fields.
- The EDB provides **customized and industry-specific business intelligence** around HR and labor market trends, including the number of job postings for a position and the top skills employers are looking for.

Training resources are closing the skills gap between the skills workers bring to the labor force and the skills most sought-after by employers.

- The EDB, WIB, and other partners developed the **Strategic Sonoma initiative**, a regional program that brings together stakeholders from around the County to identify and effectively address critical local economic development issues.
- Programs that emphasize filling specialized skills gaps are now available. For example, the **Work Experience Department** at **Santa Rosa Junior College (SRJC)** helps develop desirable work habits, attitudes, and soft skills through internships, apprenticeships, community involvement and other opportunities. Additionally, the **Integrated Education and Training course** at **SRJC** is focused on both ESL and Basic Construction skills. Students receive vocational counseling and supportive services through Job Link, including job search and job development.
- Work-based learning opportunities are offered through a number of sources; see the resource matrix on page 7 of this report for a list of programs.

Employer expectations are rising, reflected by the growing demand for top candidates with a Bachelor's or Advanced degree. Education is a top priority for Sonoma County and resources for continuing education programs are vital to success.

- Sonoma County offers a number of top-rated K-12 schools and a variety of innovative charter schools as well as higher education institutions such as SRJC, Sonoma State University, and Empire College.
- **Apprenticeship programs, service opportunities, and internships** are offered at **SRJC** and **SSU** to supplement students' education and allow students to gain valuable technical experience in their chosen field.
- The **Career Technical Education Foundation (CTE Foundation)** integrates educational opportunities with technical and STEM-related skill development. CTE Foundation courses provide curriculum and experiences that engage high school students in exploring their interests and preparing for college and careers.

RECOMMENDATIONS & RESOURCES

- The **Workforce Investment Board** and **Economic Development Board** are leading coordinated and sustained initiatives that support industry partnerships in Healthcare, Manufacturing, and Construction. These initiatives are aimed to focus on industry-involved curriculum development, talent recruitment and development, and apprenticeship and career pathways.
- This year’s survey has shown that **many businesses already demonstrate the readiness to directly address many workforce training issues**, even despite the significant impacts posed by the pandemic. In addition to internal training, the EDB, WIB and Job Link should launch a marketing campaign to businesses on the array of local workforce development resources (see below) available and clearly communicate to educational and regional partners which skills are most needed in the workplace. The EDB and WIB are making services more accessible and helping employers identify persistently hard-to-fill positions and build training programs, including paid on-the-job training, around the skills needed in those critical jobs.
- The WIB and EDB are working to create an equity framework that defines “quality job” and identifies workforce strategies to implement. Included in this framework should be the structural problem of the preponderance of low-wage jobs in an area that has an 83% higher cost of living than the national average.
- The EDB has developed an **Economic Recovery Action Plan** that includes an array of strategies which aim to address business, workforce, and community recovery. These strategies seek to make funding easily accessible to businesses in addition to supporting the hardest-hit business sectors and ensuring businesses are prepared for future disasters. The action plan also seeks to provide solutions to strengthen the county’s childcare industry, retain and attract a Sonoma County workforce, ensure that safety net services are available to help the most vulnerable residents meet their basic needs, and address housing and transportation needs.
- **Workforce support and development agencies play a central role in supporting small business talent attraction and retention efforts.** By coordinating the efforts of individual businesses, agencies can help programs achieve the scale needed for success. The EDB is working to enhance the design and broaden the participant pool for future Workforce Development Surveys and, through the Strategic Sonoma initiative, is currently engaging local stakeholders to create an economic development action plan. In addition, the WIB is adapting its workshops and job fairs to reflect current workforce needs.

RESOURCES	SERVICES
Sonoma County Job Link (WIB)	Hosts job fairs to connect employers to a pool of qualified job seekers, screens candidates, offers support and financial assistance for workforce development and training, customized training in hard and soft skills and staff development. Job Link also provides layoff support and prevention and labor market information.
Career Technical Education Foundation	Offers grants to enhance or expand in-school programs for career technical education and training in Sonoma County that align with the economic development and workforce needs of local employers such as Advanced Technology and Manufacturing, STEM, and Sonoma specialties.
Sonoma County Office of Education	Established Maker Certificate Program, oversees Maker Design Lab in Santa Rosa, holds conferences on maker education movement to train educators, offers a California Career Pathways Trust Grant to support strong, integrated career pathways from high school through Community College.
Santa Rosa Junior College	Offers around 150 skills certificates and certificates of achievement to prepare students for an entry level job or for career advancement in a chosen field and prepares students for employment in current or emerging jobs. SRJC’s Contract Education Department provides training needs assessments, on-site customized training, seminars, and workshops.
Sonoma State University	Partners with Sonoma County Office of Education to implement the Maker Certificate Program and hold the Summer High School Internship Program, a science research program for students.
Empire College	Offers career training for in-demand careers in the Law industry.

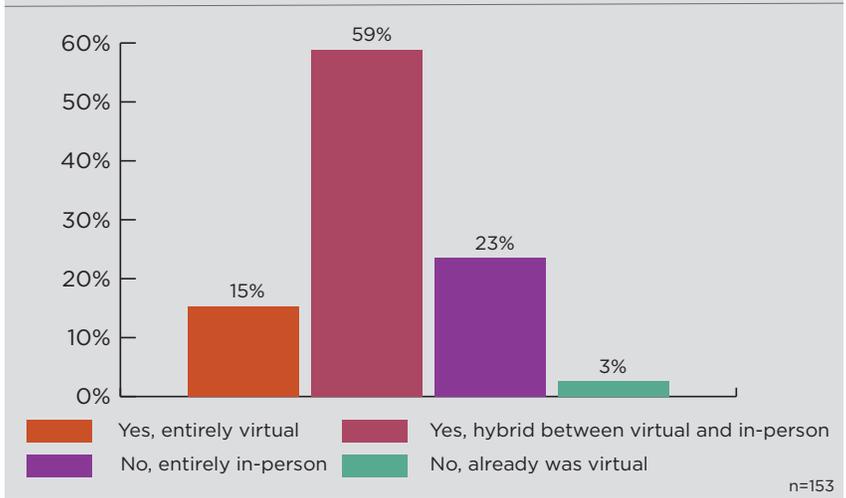


ORGANIZATIONAL CHANGES (PT. 1)

THE VIRTUAL SWITCH

COVID-19 has presented a variety of new challenges that businesses have had to adapt to. Many of the organizations surveyed have made changes in regards to the work setting for their employees. 64% of organizations surveyed have either switched to an entirely virtual work setting or have adopted an in-person/virtual hybrid work setting as a result of social distancing restrictions. Only 23% of the surveyed participants noted that their work setting has remained entirely in-person.

Has your organization switched from an in-person work setting to any sort of virtual work setting in 2020?



We asked businesses whether jobs will return to in-person after social distancing restrictions are lifted...

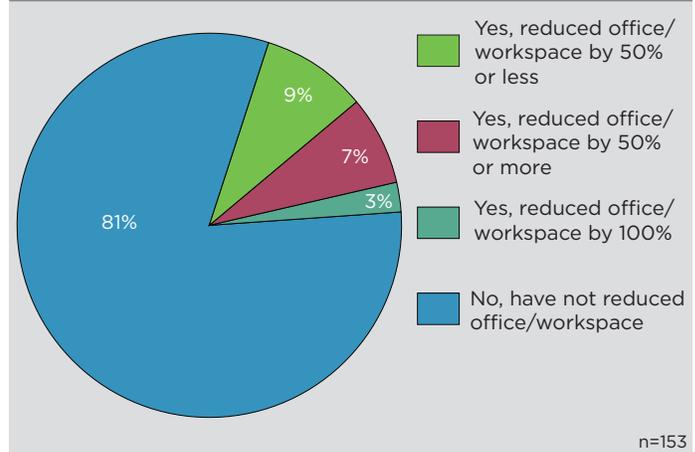
40% answered all jobs will return to in-person

5% answered all jobs will remain permanently virtual

32% answered some positions will remain permanently virtual while others will go back to in-person

23% answered not applicable/no jobs are virtual

Has your organization reduced its office or workspace in 2020?



NEW TOOLS AND TECHNOLOGY

The switch to a virtual or socially distanced work setting has led many businesses to adopt new tools and technologies in order to adapt to the new landscape COVID-19 has created.

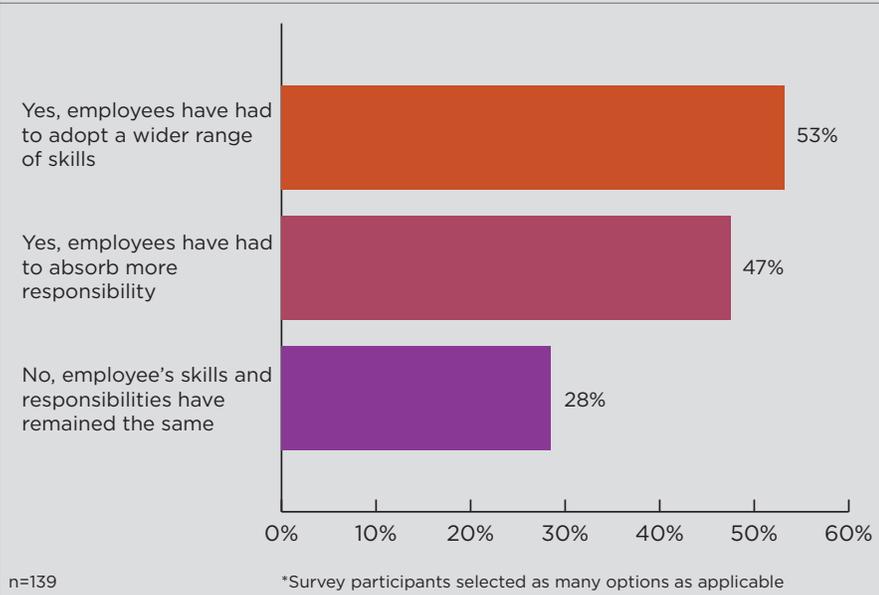
67% of respondents have adopted some form of new technology/tools, such as project management, virtual meeting, or food-service related software.

Of 139 responses, **71 respondents** specifically noted they have adopted some type of virtual meeting software like Zoom or Microsoft Teams.



ORGANIZATIONAL CHANGES (PT. 1)

In terms of organizational changes your business may have been faced with, have your employees had to adopt/absorb a wider range of skills or more responsibilities in 2020?



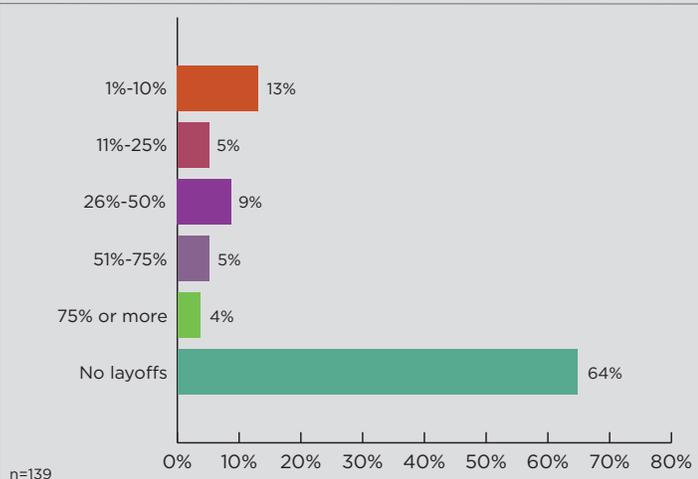
EMPLOYEE SKILLS AND RESPONSIBILITIES

COVID-19 has played a role on the individual skills and responsibilities employees have historically held. Of the businesses surveyed, 53% of respondents noted that their employees have had to adopt a wider range of skills and 47% of respondents noted their employees have had to adopt more responsibilities. Only 28% of the businesses surveyed noted no changes in terms of employees' range of skills or responsibilities.

REDUCED SKILLS

While COVID-19 has presented businesses with extreme challenges in terms of both operations and finances, the majority of businesses surveyed (64%) noted that they did not have to lay off any of their employees. Those who did lay off employees noted the top skills pertaining to those reduced positions were customer service skills (67%) interpersonal skills (37%), and knowledge skills (35%).

If your organization has had to lay off employees in 2020, what percentage of total jobs in the organization were reduced?



Top 10 skills related to those positions which have been reduced in 2020

	Skill	% of Organizations Selecting Skill
1	Customer Service skills	67%
2	Interpersonal skills	37%
3	Knowledge skills	35%
4	Analytical skills	31%
5	Organizational skills	29%
6	Physical skills	29%
7	Other/Misc. skills	29%
8	Basic Computer skills	27%
9	Motivation skills	20%
10	Language skills	14%

*Survey participants selected as many skills as applicable

ORGANIZATIONAL EXPENSES (PT. 1)

75% of survey participants noted that their organization has expenses (rent, lease, financing, utilities, etc.) that have remained unchanged during the pandemic. A number of those with unchanged expenses noted that these expenses have exceeded business revenue/income.

“Our expenses and operating hours to meet needs of students in virtual learning, have increased 150%”

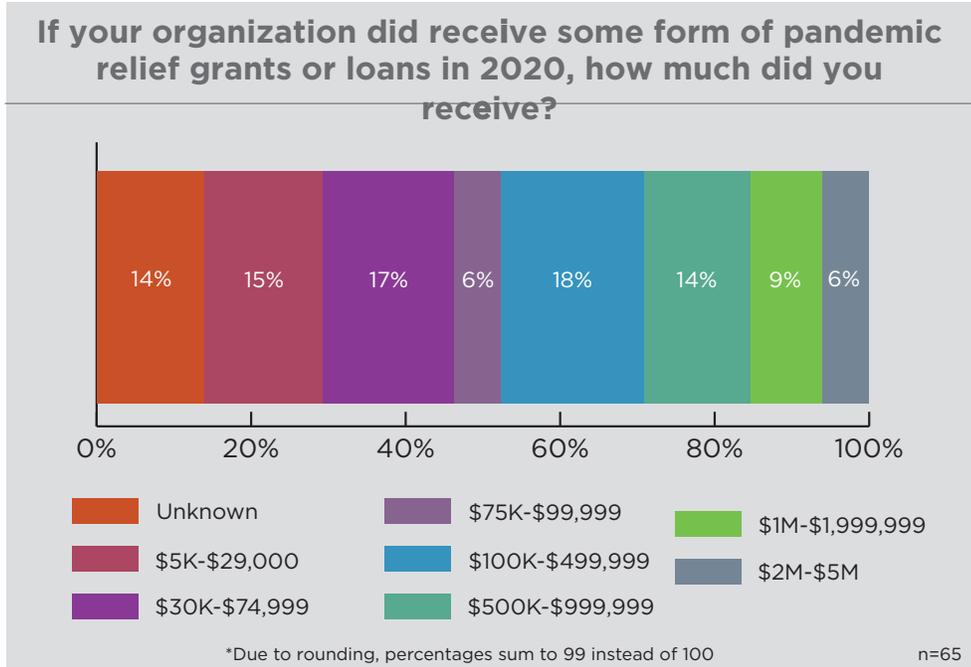
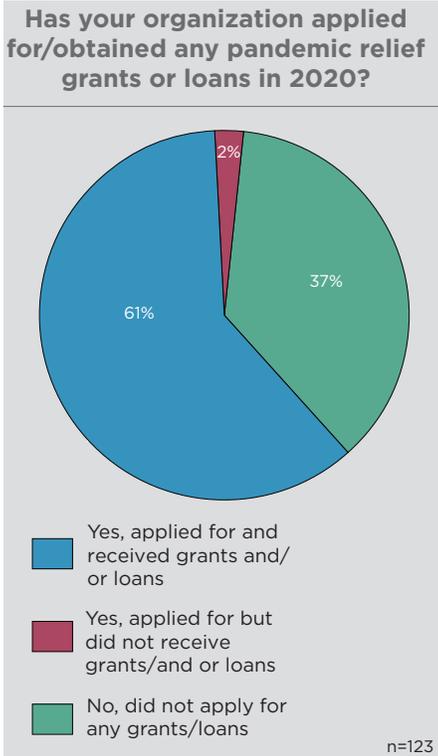
“Rent/utilities/insurance have remained unchanged. Some months they do not exceed our revenue, others have exceeded from 25%-50%”

“We had to reduce staffing costs to offset these expenses”

“Revenue has dropped to essentially \$0”

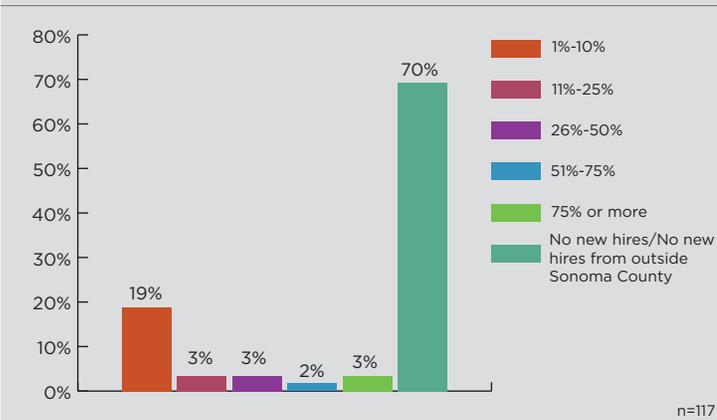
“Expenses exceeded revenue by about \$2M”

“Paid the expenses with savings and have now completely wiped out my savings”



HIRING & RECRUITMENT (PT. 2)

If your organization hired new full-time employees in 2020, what percentage of those hires came from outside Sonoma County?

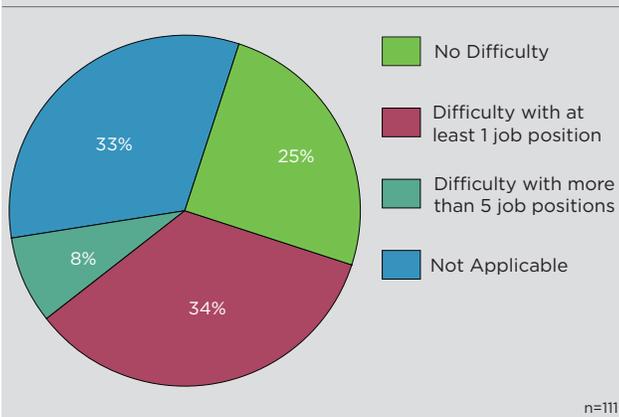


Top skills related to full-time hires made from outside Sonoma County in 2020

	Skill	% of Organizations Selecting Skill
1	Analytical skills	42%
2	Other/Misc. skills	42%
3	Interpersonal skills	39%
4	Knowledge skills	39%
5	Basic Computer skills	33%
6	Customer Service skills	33%

*Survey participants selected as many skills as applicable

Did your organization experience any hiring difficulties in 2020?



Top reasons organizations experienced hiring difficulties:

Lack of Relevant Work Experience

Insufficient Number of Applicants

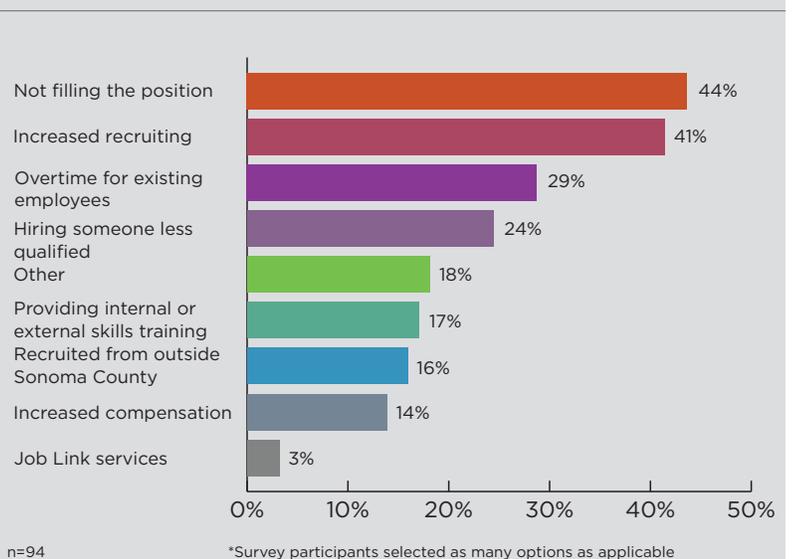
Lack of Education Credentials

Unwilling to Work Due to COVID-19/Unwilling to Give Up Unemployment Benefits

HIRING DIFFICULTIES

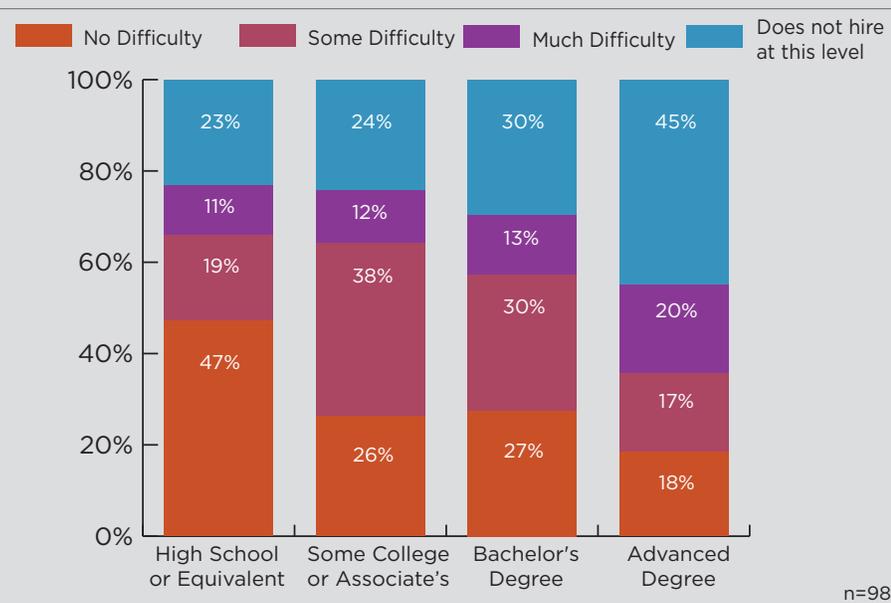
42% of survey participants experienced hiring difficulties with at least one position in 2020. The most commonly noted explanation for difficulty hiring was a lack of relevant work experience. However, a number of respondents experienced hiring difficulties due to the fact that individuals were either unwilling to return to work due to concerns related to COVID-19 or an unwillingness to give up unemployment benefits. In terms of how organizations respond to these hiring difficulties, the top response was to not fill the position (44%).

How does your organization respond to hiring difficulties?



EDUCATION, SKILLS, & TRAINING (PT. 2)

Has your organization experienced significant difficulty finding applicants at the following education levels?



EDUCATION, INTERNSHIPS, & CO-OPS

57% of survey participants said they would be more willing to hire someone without the minimum required level of education if the candidate was bilingual.

51% of survey participants said they would be interested in internship opportunities in partnership with local universities. 10% of participants have existing internship programs.

47% of survey participants said they interested in cooperative educational opportunities in partnership with local universities. 18% of participants have existing co-op programs.

SKILLS & TRAINING

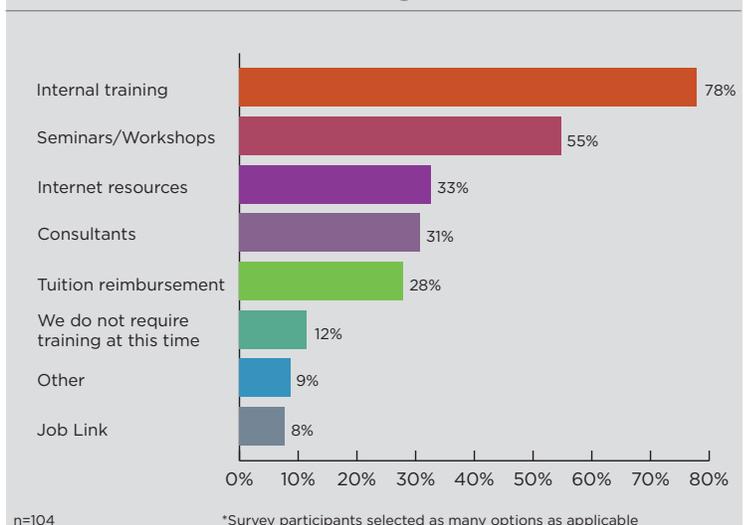
We asked participants what skills were lacking in the workforce. Motivation skills (53%), knowledge skills (45%), and analytical skills (41%) were the top 3 selected responses. In terms of resources used by organizations in order to meet training needs, internal training was the most selected response amongst survey participants (78%). Seminars/workshops (55%) and internet resources (32%) were the other most popular responses. Only 12% of participants do not require any type of training.

Responses for Specific Skills Lacking in the Workforce

	Skill	% of Organizations Selecting Skill
1	Motivation skills	53%
2	Knowledge skills	45%
3	Analytical skills	41%
4	Customer Service skills	40%
5	Organizational skills	39%
6	Interpersonal skills	38%
7	Other/Misc. skills	25%
8	Basic Computer skills	24%
9	Physical skills	21%
10	Language skills	21%

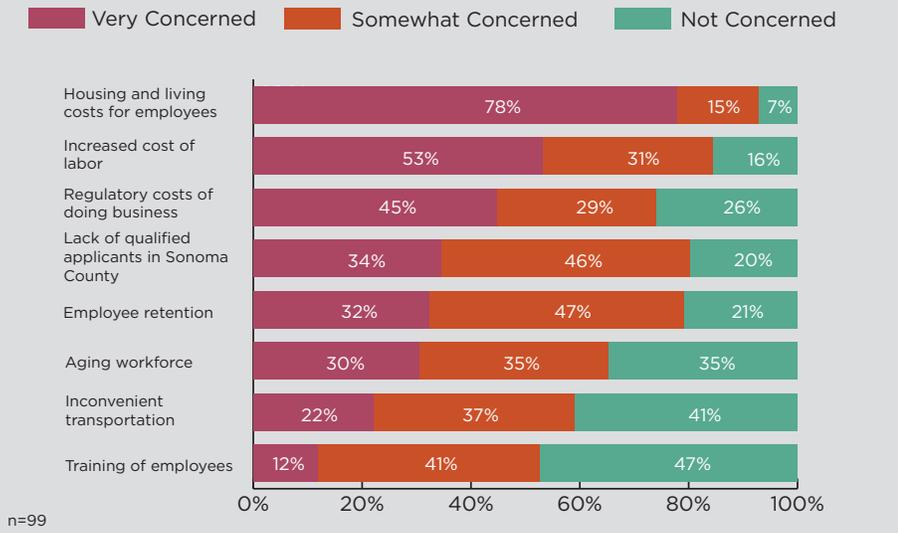
*Survey participants selected as many skills as applicable

What resources does your organization use to meet training needs?



CONCERNS & ASSISTANCE (PT. 2)

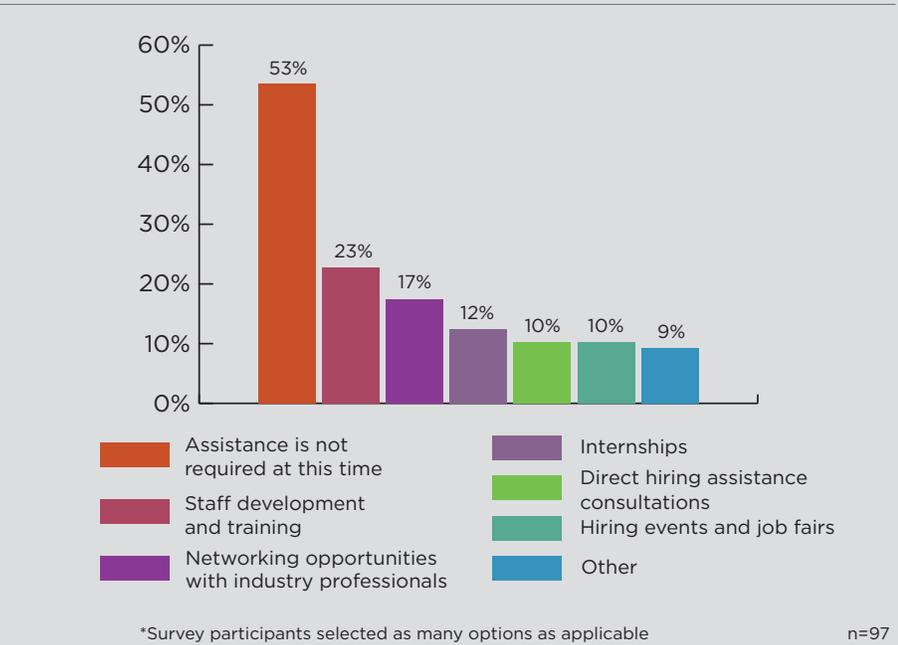
How concerned is your organization with the following workforce issues?



WORKFORCE CONCERNS

Since the previous Workforce Development Survey Report in 2017, housing and living costs for employees continue to be the number one issue organizations choose as a concern, with 78% of participants noting they were very concerned about this issue. An increase in the cost of labor was cited as the second most common concern businesses face, with 53% of participants stating they were very concerned about this issue. These findings suggest that businesses are continuing to anticipate high costs of attracting and retaining their workforce.

What areas does your organization need assistance in?

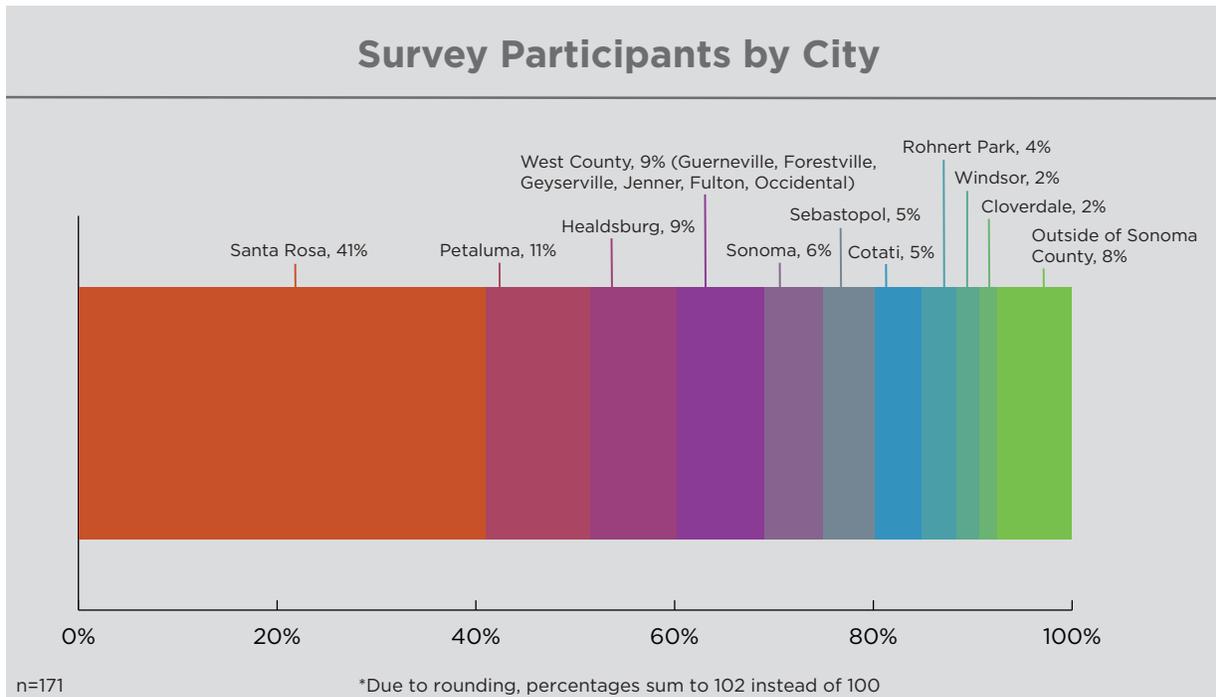


WORKFORCE ASSISTANCE

Despite the concerns businesses are facing as noted above, 53% of survey participants responded that assistance is not required at this time. This supports the trend that organizations are choosing to address both training and hiring needs internally. Those organizations that did express a need for assistance cited staff development and training (23%) and networking opportunities with industry professionals (17%) as the top desired resources for assistance.

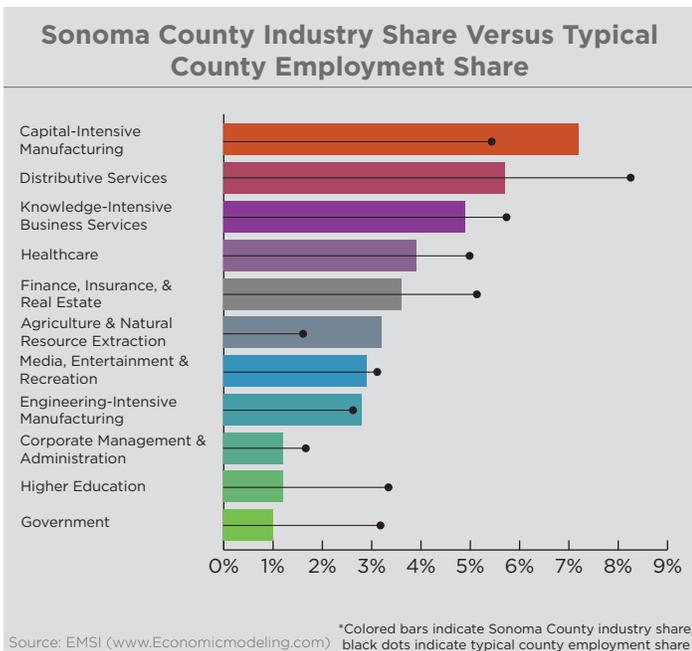


PROFILE OF RESPONDENTS



INDUSTRY DIVERSITY

Sonoma County scores high in industry diversity, ranking 51st out of 3,142 US counties with an industry diversity rating of 98.4%. This means that employment is distributed more evenly amongst the 12 industry clusters when compared to the typical county. High diversity regions can signal greater economic stability and better withstand economic pressures than regions with low industry diversity (EMSI).



Sonoma County Industry Diversity Chart

Industry Cluster	2020 Jobs	% of Total Employment	% of Typical County Employment
1 *Non-Function Employment	147,943	62.4%	55%
2 Capital-Intensive Manufacturing	17,039	7.2%	5.4%
3 Distributive Services	13,601	5.7%	8.2%
4 Knowledge-Intensive Business Services	11,652	4.9%	5.8%
5 Healthcare	9,258	3.9%	5%
6 Finance, Insurance & Real Estate	8,471	3.6%	5.1%
7 Agriculture & Natural Resource Extraction	7,537	3.2%	1.6%
8 Media, Entertainment & Recreation	6,956	2.9%	3.1%
9 Engineering-Intensive Manufacturing	6,664	2.8%	2.6%
10 Corporate Management & Administration	2,864	1.2%	1.7%
11 Higher Education	2,852	1.2%	3.3%
12 Government	2,271	1%	3.2%
Total	237,108	100%	100%

*Non-function employment refers to industries that primarily serve local markets and are non-export based industries such as retail, dentist offices, and construction
Source: EMSI (www.Economicmodeling.com)



SURVEY NOTES & METHODOLOGY

SURVEY NOTES

The 2021 Workforce Development Survey Report provides a detailed overview of the workforce needs of Sonoma County employers. Data utilized in the report was obtained through the creation and distribution of an online survey to a diverse sample of Sonoma County businesses, non-profits, and public agencies.

The 2021 Workforce Development Survey Report is not intended to provide a complete analysis of the needs of Sonoma County employers. The Economic Development Board (EDB) and Workforce Investment Board (WIB) believe that the information contained within this report is accurate and reflective of the most current data available, but this does not guarantee accuracy or completeness. Use of data from an outside source does not represent an endorsement of any product or service by the EDB, WIB, or any of their members or affiliates.

Interested readers are encouraged to contact data resource agencies for further research or to visit the EDB website, www.sonomaedb.org for more information. Readers are also encouraged to direct all inquiries or suggestions for future reports to the EDB by calling (707) 565-7170 or emailing edb@sonomacounty.org.

SOURCES

2021 Workforce Development Survey

EMSI (www.Economicmodeling.com)

(All quotes are from 2021 Workforce Development Survey respondents)

SURVEY METHODOLOGY

Invitations to complete the 2021 Workforce Development Survey were emailed to businesses identified by the EDB and WIB and posted on the EDB's Facebook, Twitter, and LinkedIn. Both an English and Spanish version of the survey were distributed. The 29-question survey was administered using SurveyMonkey, and 173 responses were received. Survey answers are equally represented and are not weighted. Some graphs and percentages may not add up to 100%, as survey respondents were able to select multiple answers on some questions in order to accurately reflect their employer needs.

The [EDB](#) offers business tools that include assistance in talent attraction, navigating the permit process; market research tools to identify growth potential; site selection assistance to help locate a site to meet business needs; customized demographic and psychographic information to help identify customers; and connections to additional resources to help local business grow and expand. [Sonoma County Job Link](#), the one-stop career center administered by the WIB, offers job counseling, training, financial assistance for employers, scholarships, hiring events and job fairs, and business referral services. Employers and job seekers are encouraged to take advantage of these resources.

ACKNOWLEDGMENTS

Max Brownlee is the Workforce and Public Policy Project Coordinator (2020-2021), and was responsible for the management of this report including the preparation, development, data collection, data cleaning, statistical analysis, and finalization of the 2021 Workforce Development Survey Report.

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