elev∧te
northeast florida

Chapter 3 Executive Summary:
Workforce Development Assessment

CAEL avalanche   September 2018

About the Strategy

In March 2018, JAXUSA Partnership, Northeast Florida Regional Council, CareerSource Northeast Florida, and other partners initiated a Regional Economic Development Strategy to improve regional competitiveness and collaboration throughout Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns Counties. Avalanche Consulting, a national economic development consultancy, and the Council for Adult and Experiential Learning (CAEL), a national nonprofit focused on lifelong learning, were selected to facilitate the preparation of the economic development and workforce development strategy.

Once complete, Elevate Northeast Florida will have four chapters:

Chapter 1: Economic Assessment & Community Benchmarking

The first chapter of the Elevate Northeast Florida Strategy includes an in-depth analysis of the region's current economic and demographic conditions, in comparison to national and statewide trends, as well as selected benchmark regions. The first chapter also includes a SWOT Analysis (strengths, weaknesses, opportunities, and threats) based on both quantitative and qualitative information gathered through focus groups, interviews, and an online survey.

Chapter 2: Target Industry Validation & Update

Chapter 2 examines the current status of the region's existing target industries and niche sectors that can be integrated into an updated target list for future economic development efforts. This Target Industry Validation & Update includes written profiles for each target industry, marketing messages, and an industry trend analysis.

Chapter 3: Workforce Development Assessment

The Workforce Skills Assessment report analyzes the skill sets of Northeast Florida's workforce and highlights workforce attributes that distinguish Northeast Florida from the competition or need improvement. Chapter 3 will also include an examination of existing educational pathways, current and potential gaps in workforce supply, and opportunities for transitioning workers into higher growth careers.

Chapter 4: Marketing & Strategic Plan

The final chapter of Elevate Northeast Florida will provide marketing and community investment recommendations to help the region be even more competitive globally. Chapter 4 will also include an implementation timeline, estimated budget, and performance metrics that will equip Northeast Florida leaders with the tools it needs successfully implement the Strategy.

Project Partners

The Elevate Northeast Florida Strategy is being developed by JAXUSA Partnership, CareerSource Northeast Florida, and the Northeast Florida Regional Council in partnership with Avalanche Consulting, CAEL, and local residents, public organizations, and private businesses.

JAXUSA Partnership

JAXUSA Partnership is a private, nonprofit division of the JAX Chamber and is Northeast Florida's regional economic development initiative. Its mission is to be a catalyst for economic growth and maximize the region's unique resources to aggressively recruit jobs and private capital investment to the region. JAXUSA coordinates economic development efforts across a seven-county region that includes Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns Counties.

Northeast Florida Regional Council (NEFRC)

The Northeast Florida Regional Council (NEFRC) is the regional planning organization for seven Northeast Florida counties (Baker, Clay, Duval, Flagler, Putnam, Nassau and St. Johns) and their 27 municipalities. The mission of the NEFRC is to celebrate the unique assets of Northeast Florida and to engage its people, businesses, governments and organizations. In 2009, NEFRC adopted a Comprehensive Economic Development Strategy (CEDS). Updated in 2012 and 2015, the CEDS buttresses other economic development efforts in the region through identifying programs and projects essential to the region's economic development objectives.

CareerSource Northeast Florida

CareerSource Northeast Florida is a publicly funded agency that provides extensive workforce-related services to six counties on Florida's First Coast – Baker, Clay, Duval, Nassau, Putnam, and St. Johns Counties. CareerSource opens the door to improved employment opportunities through education, training, and career services for workers. CareerSource administers an annual budget of more than $20 million.

Northeast Florida Residents & Businesses

Development of the Elevate Northeast Florida Strategy involved face-to-face discussions with private business leaders, representatives of philanthropic organizations, economic development professionals, and other civic champions. Additionally, more than 1,300 residents and business owners completed an online survey as part of the economic development strategic planning process.

(continued)

Project Partners (continued)

Avalanche Consulting, Inc.

Avalanche Consulting is the nation's premier economic development strategist. Avalanche is deeply driven to make a positive impact and seek clients who are equally inspired to energize their economies. Headquartered in Austin, Avalanche was established in 2005 and its team has a combined 80+ years of experience working with more than 150 cities, counties, and regions across the country.

Council for Adult and Experiential Learning (CAEL)

CAEL is a national, non-profit organization whose mission is to put meaningful learning, credentials and work within reach for every community. CAEL works to remove policy and organizational barriers to learning opportunities, identify and disseminate effective practices, and deliver value-added services. Since its founding in 1974, CAEL has been providing colleges and universities, companies, economic development organizations, labor organizations, and state and local governments with the tools and strategies they need for creating practical and effective lifelong learning solutions to address long-term skills needs.

Steering Committee Members

The Elevate project partners and consulting team sincerely thank the members of Elevate Northeast Florida's Strategy Committee for helping inform and guide the development of this strategic plan. Members include:

Tony Allegretti, *Cultural Council of Greater Jacksonville*
Katrina Austin, *Flagler County DEO*
Dr. Perry Bechtle, *Mayo Clinic*
Brian Bergen, *Putnam County EDC*
The Honorable Aaron Bowman, *City of Jacksonville*
Michelle Braun, *United Way of Northeast Florida*
Debbie Buckland, *BB&T*
Carolyn Clark, *Urban Land Institute*
Josh Cockrell, *Infinity Global Solutions*
Rena Coughlin, *Nonprofit Center*
Steve Crosby, *InvestJAX*
Jay Cunio, *JAA*
Dr. Mark Dawkins, *University of North Florida*
Laura DiBella, *Nassau County EDB*
Lara Diettrich, *Diettrich Planning*
Janice Donaldson, *Small Business Development Center*
Kevin Doyle, *Wexford Strategies*
Heather Duncan, *AT&T*
Karen Everett, *St. Johns County Chamber of Commerce*
Bruce Ferguson, *CareerSource Northeast Florida*
Mike Fleming, *Jacksonville University*

Elizabeth Feustel, *Jacksonville Civic Council*
Bill Garrison, *NEFBA*
Melissa Glasgow, *St. Johns County*
Jake Gordon, *Downtown Vision*
Shelley Hirsch, *Nassau County EDB*
Elaine Johnson, *Guidewell*
Will Ketchum, *Burdette Ketchum*
Robin King, *CareerSource Flagler Volusia*
Jana Kooi, *Florida State College at Jacksonville*
Dr. Anna Lebesch, Steering Committee Co-Chair, *St. Johns River State College*
Eric Mann, *First Coast YMCA*
Phyllis Martin, *United Way of Northeast Florida*
Trina Medarev, *World Affairs Council*
Jeanne Miller, *Jacksonville Civic Council*
Sherri Mitchell, *Nassau County EDB*
Katie Mitura, *Visit Jacksonville*
Candace Moody, *CareerSource Northeast Florida*
Alan Mosley, *Regional Transportation Commission*
The Honorable Don O'Brien, *Flagler County*
Mary O'Brien, *Meridian Waste*

Jeff Parsons, *AT&T*
Laura Pavlus, *Clay County EDC*
Robert Peek, *JAXPORT*
Jordan Pope, *JEA*
Crawford Powell, *Baker County Chamber of Commerce*
Ed Randolph, *City of Jacksonville OED*
Lake Ray, *FCMA*
Darryl Register, *Baker County Chamber of Commerce*
Bob Rhodes, *Attorney-At-Law*
Jeff Sheffield, *North Florida TPO*
Darnell Smith, Steering Committee Co-Chair *Florida Blue*
Kelly Smith, *Wells Fargo*
Jim Stallings, *Ps27 Ventures*
Chereese Stewart, *Clay County*
Crystal Stiles, *FPL*
Brian Teeple, *Northeast Florida Regional Council*
Brad Thoburn, *JTA*
Helga van Eckert, *Flagler County DEO*
Nina Waters, *Community Foundation for Northeast Florida*
Kirk Wendland, *City of Jacksonville OED*

About The Workforce Development Assessment

This Workforce Development Assessment is the third chapter of the Elevate Northeast Florida Comprehensive Economic Development Strategy. The Assessment provides an in-depth analysis of the education, talent, and workforce in the JAX region. The full report begins with qualitative analysis, followed by a gap analysis and ends with more detailed goals and strategies based on our findings.

Information Gathering and Key Takeaways

Stakeholder Engagement

During this project, CAEL and Avalanche led four two-hour Steering Committee workshops, four Workforce Partners workshops, two Regional Forum presentations, 13 interviews, 20 focus groups, and seven half-day workshops in each county in the region. More than 1,300 people participated in a regional survey.

Education & Talent SWOT Analysis

The SWOT Analysis provides another format for sharing themes that evolved from Elevate Northeast Florida's to-date research. The SWOT melds quantitative analysis with stakeholder input in order to summarize the region's strengths, weaknesses, opportunities, and threats as they relate to Education and Talent in the region. The SWOT serves as an inspiration for the final strategy's recommendations and marketing messages.

Workforce Plan: Goals, Strategies, and Best Practices

The Workforce Plan is a comprehensive analysis with detailed goals, strategies, and best practices based on all qualitative and quantitative data collected throughout this project. Key themes that are the focus of this strategy involve Awareness, Access & Alignment, Engagement & Career Mobility, Innovation & Elevation, and Resiliency.

Education Asset Inventory (EAI)

A review of secondary and postsecondary education and training programs identifies and inventories programs that support the target industries in the Northeast Florida region. We reviewed program offerings from secondary Career and Technical (CTE) programs, industry certifications, associate degrees, and doctorate level programs. The data in this analysis is based on institutions' course catalogs and available online information, and only includes program availability; student enrollment, and outcome measures were not included in the inventory. This section also includes the regional data overview, industry sector analysis and a review of workforce supply gaps.
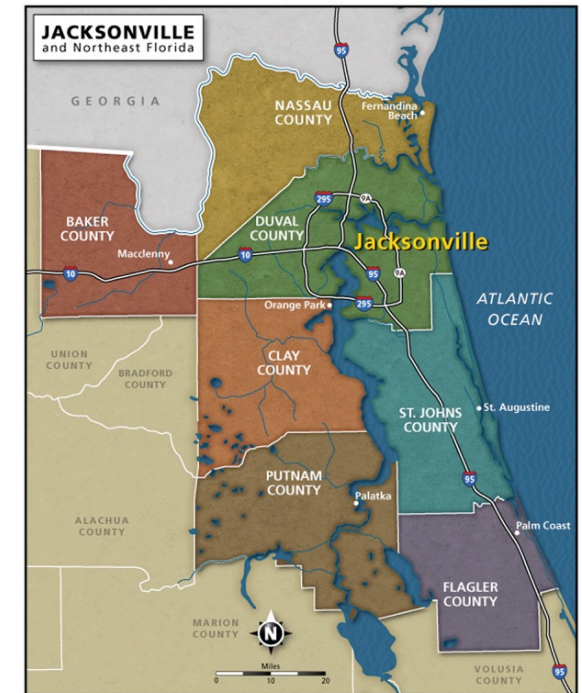
SWOT Findings: Talent, Education & Workforce

STRENGTHS

- Educational attainment in Northeast Florida at the associate's degree level exceeds national and statewide averages. The percent of workers with degrees has increased 3% since 2012.

- The region's workforce has grown at a faster pace than available jobs.

- Survey participants recognize the quality of the region's colleges and universities as one of its top five strengths. The region boasts a higher concentration of bachelor's degrees in Science & Engineering - related fields relative to the US average.

- Earn Up is a strength and a beacon to employers that area leaders are proactively improving educational attainment.

- The region's workforce programs for veterans are frequently cited by employers as one reason that they are located in Northeast Florida.

WEAKNESSES

- Educational attainment in Northeast Florida at the bachelor's and higher level is improving, but trails the US average.

- Due to the lack of transportation availability and geographic distance of education/service offerings, workers in some parts of Northeast Florida find it difficult to pursue additional education or access career assistance.

- Regional employers and leaders have voiced concerns about their ability to find a sufficient number of employees in certain fields, given the region's relatively low levels of unemployment.

- 42% of those surveyed for this strategy said that they are not aware of career opportunities or pathways in the region.

OPPORTUNITIES

- The region consistently attracts recent college graduates, contributing to the region's rising levels of educational attainment. Maintaining this trend, as well as investing in education programs and career pathway awareness at home, will greatly benefit the region's economy.

- Young professionals in Northeast Florida have higher than average educational attainment at the associate's degree level. Promoting this fact should help attract businesses seeking skilled tradespeople.

- The region is home to numerous colleges and universities that provide a continuous supply of new, skilled workers. The quality of regional post-secondary institutions is perceived by residents to be a core regional strength that should be expanded.

- New leadership has recently transitioned into many higher education institutions, providing opportunities to partner with institutional leaders on economic development and workforce development initiatives.

THREATS

- An aging population and the impending Baby Boomer retirement is a significant issue for many industries. It is beginning to limit the availability of workers in key fields such as production and engineering. This threat impacts many regions in the US, including Northeast Florida.

- Rising housing costs, especially in and around urban cores, have pushed a growing number of workers away from established employment centers. The misalignment between where people live and work, plus growing issues around the availability of transportation and highway congestion, could make hiring and worker retention more difficult.

Key Takeaways

Throughout conversations, focus groups, community responses and workshops conducted during the Workforce Strategy phase of the Elevate Northeast Florida process, the need for a talented workforce and cohesive education, training, and workforce system was expressed. In order for Northeast Florida to continue inclusive economic growth and be able to compete on a global scale, talent and business attraction is imperative. With an almost full employment labor market, there is the need to have a labor pool with the right skills, access, and support along a career pathway. The ability to attract and retain talent in the region is the key to success for any community – particularly in Northeast Florida where the population growth, since 2010, has increased at more than twice that of the national growth rate.

Talent attraction, retention, and development needs to be at the forefront in all standing JAXUSA engagements and is certainly core to the Elevate Northeast Florida Workforce Strategy. Infusing messages with language that bolsters, leverages, and builds upon existing talent initiatives will create a more regional, national, and even global understanding of how invested and committed this region is to creating a workforce system and talent supply that is ready to meet the needs of both the current and future economy. The following strategy provides five key themes and goals that Northeast Florida should adopt, implement, and sustain. This strategy includes a deep set of goals, strategies, and tactics, as well as examples of best practices that can be implemented to guide the action planning and implementation of these efforts. The strategy is intended to be a living document that the stakeholders and regional leadership should use to guide investments, programmatic solutions, and coordinated and collaborative efforts in order to achieve a world-class workforce system in Northeast Florida.

This strategy is reflective of the talent attraction, retention, development, and system alignment goals as identified through the Elevate Northeast Florida process. The subsequent goals, strategies, and tactics encompass efforts and activities, currently underway or in the process of being deployed, by all of the key stakeholders in the Northeast Florida labor and talent development market. Elevate Northeast Florida Workforce Strategy lays out a comprehensive plan that will increase coordination among employers, educators, workforce development leaders, economic development organizations, and other regional skill development efforts in order to create a highly skilled, highly competitive workforce that will spur and drive economic growth. This strategy is to be lead by leaders across the region and across systems. This is not a single source strategy with one main actor leading efforts long term. This is an ambitious plan with bold and innovative goals which require partnership, coordination, and communication across many systems to achieve better talent alignment within the region.

Elevate NEFL Workforce Strategy – *Thematic Elements*

Goal 1 Theme – Awareness
Talent and Business Retention and Attraction

Goal 2 Theme – Access and Alignment
Inclusive Economic Development and Growth

Goal 3 Theme – Engagement and Career Mobility
Industry Partnerships and Career Pathways

Goal 4 Theme – Innovation and Elevation
Business Development and Incubation

Goal 5 Theme – Resiliency
Value of Lifelong Learning and Skill Development

Summary: Goals and Strategy

GOAL 1: Northeast Florida is known as a great place to live, work, and learn. *(Focus on Talent and Business Retention and Attraction)*

1.1 Common and reinforced messages on career opportunities in Northeast Florida

1.2 Outreach and career access opportunities targeted to college students locally (reinforce FindYourJAX)

1.3 Targeted marketing and outreach to southern region of US and state of Florida university students

1.4 Increase system coordination (Economic and Workforce Development) to support business retention, expansion, and attraction efforts

GOAL 2: All residents have an opportunity to thrive in Northeast Florida *(Focus on Inclusive Economic Development and Growth)*

2.1 Coordinate and deploy social and wrap-around services to reach residents in need

2.2 Support Learn and Earn skill development models for all working residents

2.3 Common advocacy agenda for regional investments to bridge the "Benefits Cliff"

GOAL 3: Northeast Florida industry partnerships are strong and career pathways enable mobility *(Focus on Industry Partnerships and Career Pathways)*

3.1 Transition entry-level working population into careers in growing industries

3.2 Remove policy, perception, and communication barriers to upward mobility within the Northeast Florida workforce

3.3 Consistent, coordinated, and effective employer engagement is deployed to support business needs across the seven county region

GOAL 4: New Economy and STEM focus drives investment and alignment efforts in Northeast Florida *(Focus on Business Development and Incubation)*

4.1 STEM awareness, interest, and skill development is formally supported and scaled across the region (reinforce STEM2Hub and Renaissance JAX)

4.2 Coordinate advocacy, funding, and venture capital investments for STEM professional development, entrepreneur efforts, research & development

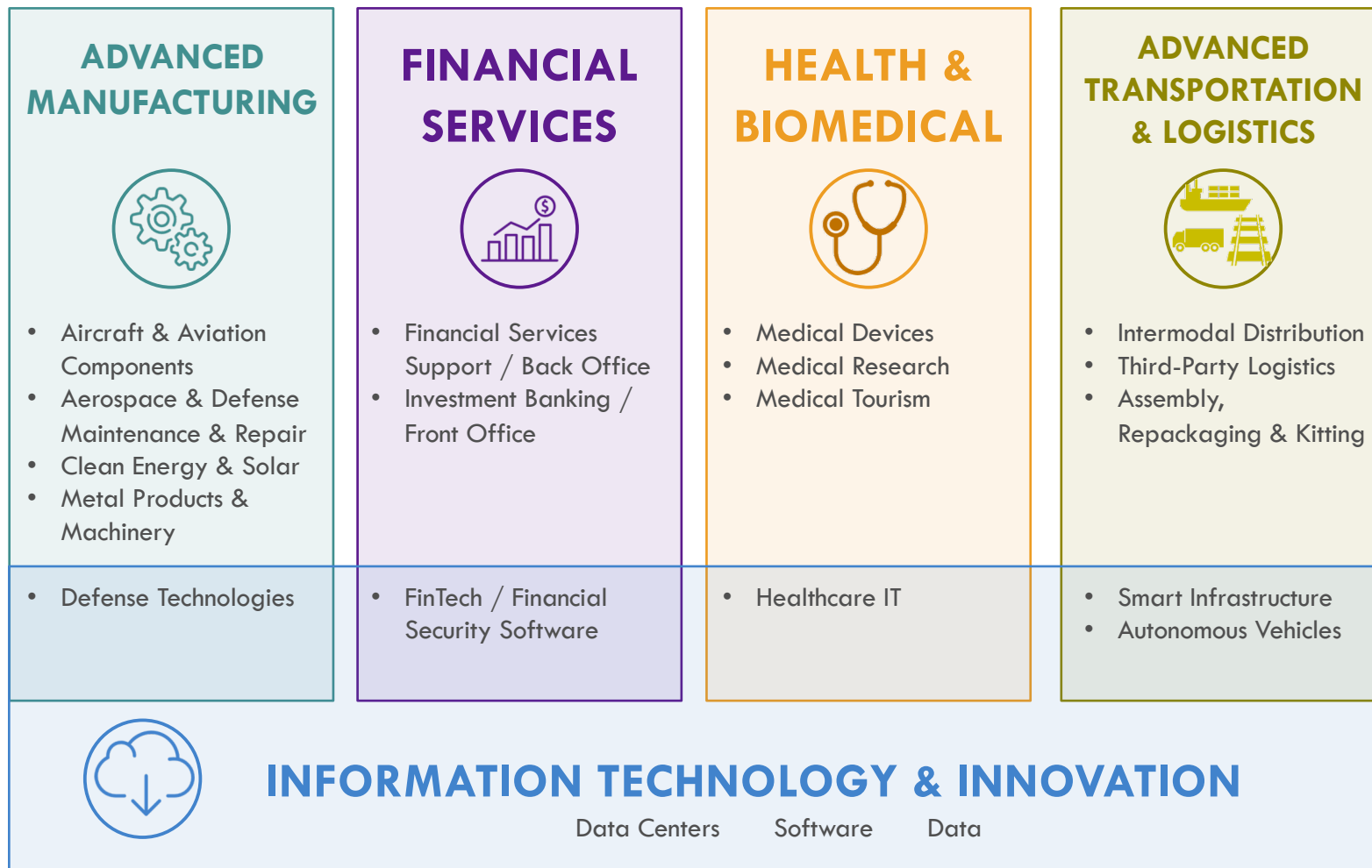**GOAL 5: Northeast Florida has a culture of lifelong learning and a resilient workforce** *(Focus on Value of Skills Development and Credential Attainment)*

5.1 Expand and formalize efforts to increase credential completion in Northeast Florida (formally support and structure Earn Up)

5.2 Leverage and empower new education leadership within the regional systems (both in Higher Education and Secondary K-12 systems)

Elevate NEFL Target Clusters

These target clusters were used as the basis of the education and training program review, inventory, and analysis detailed in the following section of Chapter 3.

ADVANCED MANUFACTURING

- Aircraft & Aviation Components
- Aerospace & Defense Maintenance & Repair
- Clean Energy & Solar
- Metal Products & Machinery

- Defense Technologies

FINANCIAL SERVICES

- Financial Services Support / Back Office
- Investment Banking / Front Office

- FinTech / Financial Security Software

HEALTH & BIOMEDICAL

- Medical Devices
- Medical Research
- Medical Tourism

- Healthcare IT

ADVANCED TRANSPORTATION & LOGISTICS

- Intermodal Distribution
- Third-Party Logistics
- Assembly, Repackaging & Kitting

- Smart Infrastructure
- Autonomous Vehicles

INFORMATION TECHNOLOGY & INNOVATION

Data Centers   Software   Data

Gap Analysis Methodology

For this analysis, CAEL and Avalanche used a combination of publicly available datasets listed below:

Education Asset Inventory

This inventory provides a review of secondary and postsecondary education, as well as training programs, identifying and inventorying programs which support the target industries in the region. We included program offerings, from secondary career and technical education (CTE) programs to industry certifications, associate's, bachelor's and up to doctorate level degrees. The data in this analysis is based on institutions' course catalogs and available online information and only includes program availability; student enrollment and outcome measures were not included in the inventory.

Integrated Postsecondary Education Data System (IPEDS)

Each year, the National Center for Education Statistics reports the number and types of degrees awarded by US postsecondary institutions. The survey, known as the Integrated Postsecondary Education Data System (IPEDS), collects data on the field of degree, the field of study, and the level of degree. IPEDS is an established system of interrelated surveys conducted annually by the US Department of Education's National Center for Education Statistics (NCES). IPEDS gathers information from every college, university, and technical and vocational institution that participates in the federal student financial aid programs.

Bureau of Labor Statistics (BLS)

Unemployment rates for counties are based on the Local Area Unemployment Statistics (LAUS) program. LAUS estimates are produced using models that incorporate data from the BLS Current Employment Statistics (CES) program, the BLS Quarterly Census of Employment and Wages (QCEW) program, the Census Bureau's American Community Survey (ACS), the BLS Current Population Survey (CPS), and individual state Unemployment Insurance (UI) data.

Competency Key

CAEL completed the full Education Asset Inventory for each target industry sector and grouped programs into larger competencies supporting skill development within each of the sectors. For reference, the Competency Key is included in Appendix A of this report. Please refer to these groupings when using the Education Asset for strategic investment and programmatic development purposes.

Summary: Gap Analysis in Target Industries

SEVERE SHORTAGE

Accountants & Tax Examiners
Financial Managers, Analysts & Advisors
Software Developers
Doctors, Pharmacists, Surgeons & Psychiatrists
Banking Analysts
Ship/Marine Engineers
Industrial Engineers

BALANCE

Registered Nurses
Environmental Science Technician
Computer Support Technicians
Civil Engineers
Supply Chain Managers & Analysts
Mechanical Drafters
Surgical Technologists
Medical & Lab Techs
Medical Records & Health Information Technicians

SHORTAGE

LPNs and LVNs
Rad. Tech/MRI/Sonographers
Industrial Production Technicians
Aerospace Engineers
Industrial Engineering Technicians
Computer Systems & Info Security Analysts
Environmental Scientists & Engineers
Computer Network Administrators
Dental Hygienists
Web Developers
Electrical & Electronics Engineers

SURPLUS

Welders
Chemical Technicians
Mechanical Engineering Technicians
Commercial Divers & Instructors
Biological Technicians
Medical & Health Services Managers

Summary: Gap Analysis in Target Industries, continued

UNKNOWN

Truck & Commercial Drivers
Nursing Aides
Home Health Aides
Law Enforcement,
Precision Equipment Repair
Auto Mechanics
Electricians
Medical Assistants
Industrial Machinery Maintenance
Machinists

For the Gap Analysis, we have included an "unknown" category for occupations that do not have non-credit, for-profit institution data. The occupations listed here are considered "unknown," as they have large demand for workers but an unknown level of certificate output (in order of most job openings).