



**BUSINESS AND WORKFORCE
PERFORMANCE IMPROVEMENT INITIATIVE**



**Industry Scans:
Executive Summaries**

**“Strategic Opportunities for
Community Colleges”**

September 2005

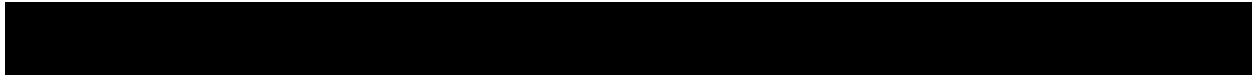
Prepared By:

The California Community Colleges
Economic and Workforce Development Program:

Centers of Excellence

Elaine Gaertner, Statewide Director
John Carrese, City College of San Francisco
Pamela Lyau, City College of San Francisco
Jan Wessell, Los Rios Community College District
Valerie Carrigan, Los Rios Community College District
John Milburn, Bakersfield College
Sharon Dwyer, Ventura College
Lisa Lewenberg, Los Angeles Community College District
Kari Caldwell, Rancho Santiago Community College District
Audrey Reille, Mount San Antonio College
Steve Sutorus, San Bernardino Valley College

* The Business and Workforce Performance Improvement Initiative is a grant-funded project through the Economic & Workforce Development Program of the California Community Colleges. Our mission is to strengthen California’s workforce and advance economic growth through education, training and job development.



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Executive Summary Industry Scan Report Orange County

Biomedical

“Production & Manufacturing Careers”



Prepared By:

**Center of Excellence, Orange County
Hosted at Rancho Santiago Community College District**

September 2005

PRODUCTION AND MANUFACTURING JOBS WITHIN THE BIOMEDICAL CLUSTER ARE PROJECTED TO GROW AT 34% AND ADD 1,957 JOB OPENINGS FROM 2004-2006.

Executive Summary

During 2004 and 2005, the Orange County Center of Excellence hosted at Rancho Santiago Community College District began conducting an Industry Scan to identify Strategic Opportunities for Community Colleges to meet high-growth, high demand training needs of employers in the surrounding community and region.

It was discovered that the biomedical industry within Orange County will grow 34% and add 1,957 new jobs to the workforce by 2006. A biomedical cluster study commissioned by the Orange County Workforce Investment Board (OCWIB) indicated that these new jobs include: assemblers & fabricators, technicians, technologists, inspectors and auditors.

According to the Orange County Business Council, "Orange County is known as the birthplace of the medical device industry and has significant emerging clusters in pharmaceuticals and biotechnology." The county has seen the development of the significant biomedical cluster with an estimated 31,300 workers and 769 firms.

That development has been spurred, in part, because biotechnology firms are receiving the major share of venture capital investments in Southern California (23.4% or \$395 million in 2003) with Orange County firms leading in awards. Proposition 71, the \$3 billion stem cell research initiative, has further made California a key center for biomedical researchers and investors.

In addition to the expected job growth, the pay scales within these occupations compare quite favorably with those of Orange County. Medical lab technologists can start at \$31,200 in the county's biomedical cluster according to the OCWIB. Chemical technicians can start at \$27,600 and assemblers & fabricators can begin at \$20,400. In each case, they can earn more money than the average starting salary in all jobs in Orange County (\$17,931).

The Orange County Biomedical strategic opportunity was identified for prospective adaptation of Community College education and training programs.

This opportunity is detailed within a full report along with reference to key data sources, a profile of the industry and specific training needs to address this opportunity. A request for the full report can be sent to caldwell_kari@rscdd.org.

Acknowledgements

Prepared By:

The Orange County Center of Excellence
Hosted at Rancho Santiago Community College District
Economic and Workforce Development
2323 N. Broadway, Suite 328, Santa Ana Ca 92706
Phone: (714) 564-5529 Fax: (714) 796-3924
caldwell_kari@rsccd.org www.cccewd.net

In Collaboration With:

John Husing, Ph.D.
Economics and Politics, Inc.
961 Creek View Lane, Redlands, CA 92373
Phone: (909) 307-9444 Fax: (909) 748-0620
john@johnhusing.com www.johnhusing.com

Strategic Partners: Industry

Southern California Biomedical Association

Strategic Partners: Education and Government

Orange County Workforce Investment Board.
Orange County Business Council
Employment Development Department, Labor Market Division.
California Community Colleges Economic and Workforce Development Program,
Biotechnology Initiative

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Executive Summary Industry Scan Report Greater Sacramento Region

Construction

“Image Makeover and Training Basics Expand the Pipeline to Dynamic Construction Careers”



Prepared By:

**Center of Excellence, Northern California Region
Hosted at Los Rios Community College District**

August 2005

THE CONSTRUCTION INDUSTRY IN THE GREATER SACRAMENTO REGION WILL GROW 7.6% BY 2008, ADDING 8,000 ENTRY LEVEL JOBS TO THE WORKFORCE

Executive Summary

The Strategic Opportunity for Community Colleges to meet the changing and high-demand training needs of the Construction Industry in the Greater Sacramento Region includes an image makeover of the industry, training basics, and developing a pipeline of trained workers into the industry. Every community college in the region can participate in this response.

The Business and Workforce Performance Improvement Initiative (BWPI) of the California Community College Economic and Workforce Development (CCCEWD) Program, has undertaken Environmental Scanning to provide targeted and valuable information to community colleges on high growth industries and occupations. This Environmental Scan is intended to provide colleges with information on which to base their response to the industry's workforce needs.

The Environmental Scan included a review of the California Regional Economies Project reports (*Northern California Economic Base Report, the Northern Sacramento Valley Economic Base Report and the Greater Sacramento Economic Base Report*) and Employment Development Department (EDD) Labor Market Information (LMID) projections that cover the communities of these colleges. The Scan also included a review of the US Department of Labor (DOL) *President's High Growth Job Training Initiative* findings.

There is potential for all colleges in the Center of Excellence region to address this Strategic Opportunity. As John Orr (Building Industry Association of Superior California) states:

The building industry in the greater Sacramento area continues to experience challenges in meeting its workforce needs. One valuable solution to the challenge has been for the industry to draw upon construction-related companies located in the counties north of the Sacramento area, who are able to augment the skilled trades workers that are based in Sacramento. The effort to complete almost 20,000 housing units in the capitol region has been aided in no small measure by this approach of casting a wider net in the search for quality construction personnel.

According to the Bureau of Labor Statistics, the education requirement for the Construction Industry Occupations is primarily on-the-job training. These occupations provide workers with even limited education (a High School Diploma or less) the opportunity to start at relatively good pay (between \$8/hr. and \$11/hr) and move to a wage level with full benefits (\$44,500/yr) within 18 months that is above Estimated Median Earnings (\$30,204; Sacramento-Yolo Metropolitan Statistical Area: 2002; US Census).

The opportunities for employment in the Construction Industry are expanding significantly. In the Greater Sacramento region, construction grew by 42,200 to 70,400 (150%) between 1992 and 2004 and, continuing at this rate, the Construction Industry would add an additional 12,953 jobs between 2004 and 2008. It is, in fact, expected to surpass the 2001-2008 EDD projections reaching 73,100 this year (2005).

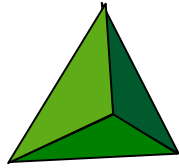
The Construction Industry is, however, often overlooked as a preferred career option. In a recent survey conducted by Sacramento-Sierra Building and Construction Trades Council only 10% of the parents surveyed affirmed that they would encourage their children to pursue a career in Construction.

The Construction Industry representatives who participated in a focus group report:

- 1) They do not have an adequate supply of applicants, and**
- 2) The majority of those that do apply do not have the basic "workability" skills to be hired and retained in construction businesses.**

While the industry states that it can provide the technical skills for individuals to perform well on the job, it is not able to provide the fundamental "workability" skills. **This is a tremendous Strategic Opportunity for the community colleges to assist** in providing the industry with a pipeline of candidates with basic training and skills who will then have the opportunity to advance quickly to well-paid positions.

This opportunity is detailed within a full report along with references to key data sources, a profile of the industry and specific training needs to address this opportunity. A request for the full report can be sent to wesselj@losrios.edu



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Executive Summary – Industry Scan Report South Central Region

CONSTRUCTION



Prepared By:

**Center of Excellence, South Central Region
Hosted at Ventura College**

September 2005

CONSTRUCTION INDUSTRY CREATES JOBS & OPPORTUNITIES FOR SOUTH CENTRAL REGIONAL COLLEGES

Executive Summary

During 2004 and 2005, the Center of Excellence hosted at Ventura College, began conducting an Industry Scan to identify Strategic Opportunities for South Central Community Colleges to meet high-growth, high demand industry needs. The timing is exceptional for South Central Regional Colleges (serving San Luis Obispo, Santa Barbara, Ventura and Los Angeles Counties) to be demand driven and market responsive to address the **construction industry pipeline issues** and establish themselves as a **point of entry** for new workers in the industry.

The construction industry has been identified as **one of nine** high growth/high demand and economically vital industries in the U.S. by the Department of Labor. Nationally, the industry is predicted to add nearly **1 million new jobs** between 2002 and 2012, an increase of 15%. It is expected to reach an **employment level of 7.8 million** by 2012, which places it as one of the **economy's top 10 largest sources of job growth**. (U.S. Bureau of Labor Statistics)

The same predictions hold true for the state of California. According to the Employment Development Department, the construction industry in the state is predicted to add nearly **230,000 new jobs (over 25% of the national growth)** between 2002 and 2012, an increase of 29.7%. South Central regional job growth is exceeding projections. The 2001-2008 projection for San Luis Obispo, Santa Barbara and Ventura Counties indicates an increase of jobs totaling 2,510; in actuality **2,300 jobs were added in 2004 alone**. (Employment Development Department Labor Market Statistics Division)

The construction industry faces a critical shortage of laborers and skilled workers. This is across the industry – nationally, statewide and locally. Its workforce is aging – the average age of a construction worker is 47 years. Fewer young people are entering the industry – pipeline and image issues are contributing to the shortage. There are basic skills and work ethic deficiencies with entry-level workers. **These workforce challenges create opportunities for community colleges.**

This report provides a profile of the construction industry; its workforce challenges and the opportunity South Central Regional Colleges have to be demand driven and market responsive to specific industry needs. A request for the full report can be sent to sdwyer@vcccd.net.

Acknowledgements

Prepared by:

The Ventura College Center of Excellence
Hosted at Ventura College
Institute for Community & Professional Development
71Day Road
Ventura, California 93003

Phone: (805) 648-8976 Fax: (805) 648-8918
sdwyer@vcccd.net www.ccewd.net

The Business and Workforce Performance Improvement Initiative is a grant-funded project through the Economic & Workforce Development Program of the California Community Colleges.

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Executive Summary

Industry Scan Report

Riverside and San Bernardino Counties

Construction Industry

“Home Construction Job Skill Ladder”



Prepared By:

**Center of Excellence, Riverside and San Bernardino Counties
Hosted at San Bernardino Community College District**

September 2005

CALIFORNIA'S CONSTRUCTION INDUSTRY SECTOR IS EXPECTED TO GROW BY MORE THAN 160,000 JOBS (24%) BY THE YEAR 2010 – Source: California State Employment Development Department

Executive Summary

During 2004 and 2005, the Riverside and San Bernardino Counties Center of Excellence hosted at San Bernardino Community College District began conducting an Industry Scan to identify Strategic Opportunities for Community Colleges to meet high-growth, high demand training needs of employers in the surrounding community and region.

It was discovered that Home Construction is a blue-collar sector that offers workers with marginal education levels the opportunity to start work at reasonably good pay and move up a variety of skill ladders to much higher incomes. Completely untrained workers can enter this field in "helper" positions averaging \$9.29 an hour (*Beginning Construction Worker*), well above the \$6.75 minimum wage. With training and experience, these workers can begin learning the various skills found on a job site and move up to average pay of \$16.48 an hour (*Entry Level: Skilled Worker*). Those workers that use experience and training to become fully qualified craftsmen can specialize in 21 different trades averaging \$23.60 an hour (*Specific Craft Skilled Worker*). Those transitioning to management can make an average of \$31.85 an hour (*Front Line Supervisor*).¹

From 1993-2004, the Inland Empire construction industry has added an annual average of 6,518 jobs (9.9% compounded) including 11,800 in 2004 (11.9%).² Home Construction workers can feel confident that their sector will continue offering employment for years to come. This is the case because rapid population growth in Southern California and the Inland Empire has meant that the Home Construction industry has had trouble building houses at the rate they are demanded. Thus, there is enough work to employ workers for decades.

"The community colleges have a strategic opportunity to develop training programs (both credit and not-for-credit) that can help workers move up a four step skill ladder towards higher incomes and responsibility in the Home Construction industry."

For the community colleges, the sector offers an opportunity to make an important contribution to assisting the 46.8% of Southern California's workforce that has never had a college class to start the process of moving toward the middle class (*Inland Empire: 50.3%*). Industry employers indicate that they find a need for several types of training, in both credit and not-for-credit settings. Entry-level workers need to understand the culture of work and appropriate behavior within it. Workers wishing to stay in the sector need the basic educational foundation required to master a skill. Workers wanting to become proficient at one of the 21 skill specialties must be taught

the theory and practice of their trade and learn to use the specialized tools to handle job sites challenges. First line supervisors need to learn how to transition from doing work to directing it.

There are, however, some difficulties. Large home builders do not have a history with the community colleges so relationships must be built from scratch. Meanwhile, most projects involve large numbers of small sub-contractors performing specialized tasks for a master developer. Complaints about worker quality or job site behavior by master developers are often a commentary on the employees of their sub-contractors. These smaller firms often expand by hiring relatives or friends of existing workers so it may be difficult to gain their acceptance of certified students or a hiring preference for them. In addition, many sub-contractors are craftsmen themselves and not business owners in the traditional managerial sense. Many will be Spanish-speaking. College program staff must thus become an integral part of a very specialized working community if they are to understand it and gain acceptance for their training programs.

Another issue is that of unions. Historically, the movement first succeeded when the construction trades organized all those with specific skills and limited the supply of workers by controlling training. Today, though many skilled workers are non-union and having learned their trades on-the-job, organized labor still controls many formal training programs. Also, though master home developers and their sub-contractors tend to be non-union, they must pay union scale due to "prevailing wage" laws applicable to projects with any from of public funding. For these reasons, the entrance of the community colleges into this arena may prove to be a challenge.

Meanwhile, students entering this sector will have families, relatively low incomes, no college experience and an appetite for a quick return on their education investment. Many courses will thus have to be in short increments and offered at non-traditional hours and off-campus. The educational fundamentals needed by many of the workers will be very basic. That said, in overcoming these difficulties, the community colleges will be fulfilling an important part of their mission.

This opportunity is detailed within a full report along with reference to key data sources, a profile of the industry and specific training needs to address this opportunity. A request for the full report can be sent to misaac@sbccd.cc.ca.us.

Acknowledgements

Prepared By:

Center of Excellence, EWD Region 9
Riverside and San Bernardino Counties
San Bernardino Community College District
114 S. Del Rosa Avenue, San Bernardino, CA 92408
Phone: (909) 382-4037 Fax: (909) 382-6005
ssutorus@sbccd.cc.ca.us
www.cccewd.net

In Collaboration With:

John Husing, Ph.D.
Economics and Politics, Inc.
961 Creek View Lane Redlands, CA 92373
Phone: (909) 307-9444 Fax: (909) 748-0620
john@johnhusing.com www.johnhusing.com

Strategic Partners: Industry

Building Industry Association of Southern California
Building Industries Association, Riverside and Baldy View

Strategic Partners: Education and Government

San Bernardino County Workforce Investment Board
San Bernardino City Workforce Investment Board
Southern California Association of Governments
Employment Development Department, Labor Market Division.

THE BUSINESS AND WORKFORCE PERFORMANCE IMPROVEMENT INITIATIVE IS A GRANT-FUNDED PROJECT THROUGH THE ECONOMIC & WORKFORCE DEVELOPMENT PROGRAM OF THE CALIFORNIA COMMUNITY COLLEGES. OUR MISSION IS TO STRENGTHEN CALIFORNIA'S WORKFORCE AND ADVANCE ECONOMIC GROWTH THROUGH EDUCATION, TRAINING AND JOB DEVELOPMENT.



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Executive Summary Industry Scan Report Los Angeles County

Logistics and Distribution *“Warehousing Career Ladder”*



Prepared By:

**Center of Excellence, Los Angeles County
Hosted at Mt. San Antonio Community College**

September 2005

SCAG'S RESEARCH INDICATES 400,000 JOBS WILL BE CREATED IN SOUTHERN CALIFORNIA'S LOGISTICS AND DISTRIBUTION SECTOR BY 2030.

Executive Summary

In 2005, the Los Angeles County Center of Excellence hosted at Mt. San Antonio Community College conducted an Industry Scan to identify Strategic Opportunities for Community Colleges to meet high-growth, high demand training needs of employers in the surrounding community and region.

The Strategic Opportunity for Community Colleges to meet the high-growth high-demand workforce needs of the Logistics Industry in Southern California includes education, training and working collaboratively with workforce development partners and high-schools to develop a pipeline of trained workers into the industry.

This first scan focuses on Warehousing; separate reports will be released on other sectors of the logistics and distribution industry. Warehousing is a sector that offers blue-collar workers with limited education the opportunity to start work at reasonably good pay and move up a variety of skill ladders to much higher incomes. The average starting pay for workers with no training is \$7.80. However, the average pay for a trained worker doing manual tasks is \$11.90 an hour (entry level: manual work). Meanwhile, this puts workers on the first rung of a four level skill ladder up which they can move by on-the-job learning and job skill training to positions that successively average: \$12.71 an hour (mid-level: equipment operation & tending), \$22.26 an hour (advanced level: equipment maintenance & repair) and \$24.07 an hour (front-line supervisor). The relatively high wages are the result of numerous factors including the shortage of qualified workers, the importance of labor as the key to productivity and profits and the utilization of information technology.

The opportunities for employment in warehousing and distribution are expanding rapidly due to the growth of international trade through the ports of Los Angeles and Long Beach and because Southern California's increasing population will require growing wholesale and retail sectors. **The sector studied in this report is expected to grow by 20% and create 28,600 new jobs in Los Angeles County between 2002 and 2012.** It is also a sector that cannot easily leave Southern California since its operations must be near the ports and the area's large population mass. Employers state that they have increasing difficulties finding qualified workers at all levels of the job ladder.

For the community colleges, the Warehousing sector offers a strategic opportunity to make an important contribution to assisting the 48.9% of Los Angeles County's workforce who have never taken a college class to earn incomes allowing self-sufficiency. Industry executives indicate that they have a need for four types of training:

- Entry-level workers need basic skills, workplace competencies, job-specific skills and often English as a Second Language classes.
- Advanced training in warehousing will allow mid-level workers to move into positions involving tasks like coordination of floor operations, inventory control, sales and customer service, or import/export.
- Supervisory training is needed to promote workers to first-line supervisor or team lead positions. This training can open up the possibility of moving further up the ladder, and potentially transitioning to supply chain management.
- Employers also need short-term training delivered through contract education at their sites.

This is a tremendous Strategic Opportunity for the Community Colleges to assist in providing the industry with a pipeline of candidates with basic training and skills, who will then have the opportunity to advance quickly to well-paid positions, and to train incumbent workers to allow them to move up the career ladder.

This opportunity is detailed within a full report along with reference to key data sources, a profile of the industry and specific training needs to address this opportunity. A request for the full report can be sent to areille@mtsac.edu.

Acknowledgements

Prepared By:

The Los Angeles County Center of Excellence
Hosted at Mt. San Antonio Community College
Economic and Workforce Development
1100 N. Grand Avenue, Bldg. 35, Walnut, CA 91789
Phone: (909) 594-5611 Fax: (909) 468-4093
areille@mtsac.edu www.ccewd.net

In Collaboration With:

John Husing, Ph.D.
Economics and Politics, Inc.
961 Creek View Lane, Redlands, CA 92373
Phone: (909) 307-9444 Fax: (909) 748-0620
john@johnhusing.com www.johnhusing.com

Strategic Partners: Industry Associations

Distribution Management Association
Council of Supply Chain Management Professionals

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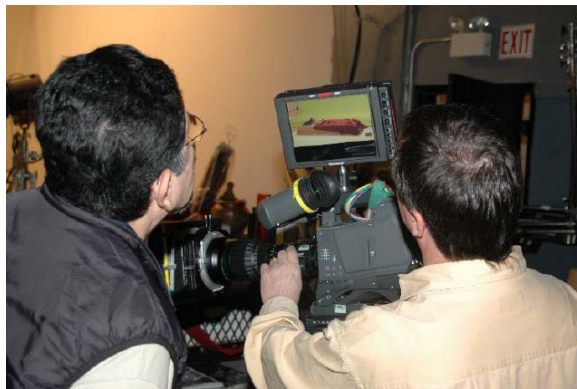
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Executive Summary Industry Scan Report Los Angeles

Entertainment

“Overview with an Emphasis on Technology”



Prepared By:

**Center of Excellence, Los Angeles County
Hosted at the Los Angeles Community College District**

September 2005

VIDEO INFOTAINMENT WILL RISE FROM \$76 MILLION THIS YEAR TO \$1.6 BILLION IN 2010¹

Executive Summary

One of Southern California's key economic clusters is the Visual Entertainment Industry. It is composed of those firms involved in the production, post-production, distribution, and visual effects and animation, in the making of motion pictures, television programs, music videos and computer games. The area of technical support services also plays a vital role in the industry and impacts all four of the aforementioned segments. The Los Angeles Economic Development Corporation (LAEDC) projects that the industry will add 3,100 jobs to the region during 2005.

This is a complex industry and while potential opportunities deserving further exploration are touched upon, this report attempts to provide an overview of industry concerns and needs, while maintaining emphasis on occupations within the industry utilizing technology, which are projected to grow in Los Angeles County. Many of these growing occupations are identified in numerous additional industries, potentially enabling those who are trained in these areas to be marketable across industries.

Opportunities exist for the colleges to expand existing programs, integrate entrepreneurial and additional soft-skills training into curricula, and provide enhanced instruction regarding how the industry works. There is also a lack of understanding regarding the breadth of occupations and opportunities to those interested in entering the field.

Students interested in the sector should understand that it is a highly competitive one in which they will face a good deal of competition for jobs. One reason for this extensive competition stems from the fact that the sector is subject to intensive booms and busts. Another, is the result of the project-based organization of work in which teams are formed to produce a movie, television program, music video, or video game and then disperse as soon as the project is over. This means that a worker's ability to have continuous work will depend on their abilities, their contacts and social network, and their ability to find jobs outside of the industry that also require their skills.

Lead workers in the various occupations of the sector almost always require at least a bachelor's degree level of training to stay at the forefront of technology. However, they can be supported by technicians with less than four-year degrees, provided they are well trained and have a solid understanding of the technologies they are using.

¹ Strategy Analytics, August 2005

One area in need of further exploration is within the area of digital cameras. This technology is widespread within the industry and growing. There are presently an insufficient number of technicians who know how to accurately operate and maintain digital equipment. Manufacturers usually provide training on equipment as well as software, but it is typically not enough to bring workers up to speed with the products. These are areas where community colleges could strengthen existing programs and provide a valuable service to students and the industry. Proprietary schools often provide these types of courses but they can range upward of \$3,000 for a three-day course.

The rapid pace of evolving technology impacts the industry in multiple ways. Not only are the areas of high definition and digitalization factors, increasingly, there is an emphasis on cell phone content. This is becoming a reality and it is projected that the North American market for mobile content will likely reach 14 billion by 2008.² As highlighted above, video Infotainment will rise from \$76 million this year to \$1.6 billion in 2010.

It should be noted that whether a student works in the Visual Entertainment Industry or not, the training they receive in preparing for the technology related jobs identified in the full report will assist them in winning well-paying technology jobs in a wide range of industry sectors.

This report is closely connected to a recent study conducted in partnership with the Multimedia Entertainment Initiative by the Entertainment Economy Institute, in which 32 occupations within the Entertainment Industry were identified as "technology occupations." Given the project-based nature of the industry, the idea that workers may have skills that enable them to additionally work in other industries was explored. If these occupations could be identified and validated with the industry, the colleges would have a better understanding of how to best prepare students for the industry, while also guiding them to be marketable across industries. Thus, it was discovered that there are at least 32 technology related jobs within the industry which reveal the potential to have equivalents in other sectors, and workers with these skills are well compensated in and out of the industry allowing them to be essentially "cross-trained."

This opportunity is detailed within a full report along with reference to key data sources, a profile of the industry, and specific training needs to address this opportunity. A request for the full report can be sent to lewenble@lacc.edu

² Strategy Analytics, June 2005.

Acknowledgements

Prepared By:

Los Angeles County Center of Excellence
Hosted at the Los Angeles Community College District
770 Wilshire Blvd, 7th Floor, Los Angeles, CA 90017
Phone: (213) 891-2162 Fax: (213) 891-2055
lewenble@laccd.edu www.ccewd.net

In Collaboration With:

John Husing, Ph.D.
Economics and Politics, Inc.
961 Creek View Lane Redlands, CA 92373
Phone: (909) 307-9444 Fax: (909) 748-0620
john@johnhusing.com www.johnhusing.com

Strategic Partners: Industry

Entertainment Economy Institute

Strategic Partners: Education and Government

Los Angeles Economic Development Corporation
Southern California Association of Governments
Employment Development Department, Labor Market Division
California Community Colleges Economic and Workforce Development Program,
Multimedia Entertainment Initiative

Photos

Cover Photo Courtesy "El Cid" / Producer Scott Billups

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BUSINESS AND WORKFORCE PERFORMANCE IMPROVEMENT INITIATIVE

Executive Summary

Industry Scan Report

Central San Joaquin Valley

FOOD & BEVERAGE MANUFACTURING



September 2005

Prepared By:
Center of Excellence, Central Region
Hosted at Kern Community College District

The Food and Beverage Manufacturing Industry within Region 5 Central San Joaquin Valley will grow 8% by 2008, adding 4,860 new openings for operators and technicians.

Executive Summary

The Business and Workforce Performance Initiative (BWPI) of the California Community College Economic and Workforce Development (CCCEWD) program has undertaken industry scanning to provide targeted and valuable information to community colleges for the years 2005-2006.

The Region 5 Central Center of Excellence (COE) has conducted an **Industry Scan** for the purpose of identifying **Strategic Opportunities for Community Colleges** to meet changing and high-demand training needs of the industries in the San Joaquin Valley (SJV) including Tulare, Kern, Kings, Merced, Fresno, Stanislaus, San Joaquin and Madera Counties.

Rapidly developing qualified workers for two occupations is critical to the economic well being of the San Joaquin Valley (SJV) and is a significant strategic opportunity for the Community Colleges if they choose to respond.

In addition to agriculture, **Food and Beverage Processing** is a key base industry generating economic wealth for the SJV. The industry is undergoing rapid modernization shifting to more automated processes. The SJV has the opportunity to capture more Food and Beverage Processing business if the industry is able to increase productivity by automating its food and beverage processing operations. Companies automating their processes are having difficulty finding the workforce to fill two high-demand and high-growth occupations. These occupations are:

1) AUTOMATION OPERATOR and 2) AUTOMATION TECHNICIAN

- **AUTOMATION OPERATORS** control and tend to various complex food and beverage processing machines and equipment. They operate cooking, slicing, cutting, heating, cooling, drying, and other computer-controlled equipment through automated systems and physical equipment.
- **AUTOMATION TECHNICIANS** install and maintain automated machinery and equipment working with builders, designers, engineers, customers, and clients. Automation technicians support and repair automated cooking machines and computer-controlled systems. In the home-building industry they might install computer systems that automate home theaters or security systems. In the medical industry, they might produce and maintain automated conveyer systems or room-temperature regulators in hospitals.

To meet the new industry requirements, **1,670 Automation operators** and **470 Automation technicians** will need to be trained in order to achieve the 2008 Occupational Projections as stated by the Labor Market Information Division of The Employment Development Department

of the State of California and to solidify the economic wellbeing of the SJV. Additionally, **1,990 new openings** are expected to be created because of people leaving the industry.

This Strategic Opportunity provides the colleges with the potential for enrollment in Credit, and Non-credit courses. There is the potential to deliver the needed training to incumbent workers through existing employers or groups/association of Food Processing employers.

Additionally this provides the colleges with the opportunity to meet a local business need that is critical to the economic well-being of the local communities.

By creating a program to deliver qualified, trained automation technicians and operators to food manufacturing, colleges can then extend that program into other manufacturing industries, such as plastics, paper and chemicals. Then, refine the program for other industries outside of manufacturing, thus giving these programs growth potential for providing automation technicians and operators to all industries across the region.

The manufacturing industry in the Central Valley region is poised to grow if it can overcome the challenge of a lack of a skilled workforce. Technology has affected all industries and is leading the way for manufacturers, like food and beverage processing, to become more efficient and effective at satisfying niche markets, such as cleaner, more nutritious fast foods, in a timely and profitable manner. If the various food and beverage manufacturers can become more flexible and efficient in technological upgrades and capital investments, then companies can (and will) capitalize on huge markets in which they are currently not participating. These technological advances are the opportunity that the sagging manufacturing industries need to remain competitive in the global market.

A 21st Century workforce needs to have the skills and training necessary to operate, maintain, troubleshoot, and control automated systems and equipment and the California Community Colleges are the place for them to acquire these skills.

This opportunity is detailed within a full report along with reference to key data sources, a profile of the industry and specific training needs to address this opportunity. A request for the full report can be sent to jmilburn@bakersfieldcollege.edu.

Acknowledgements

Prepared By:

Center of Excellence, Region 5
Hosted at Kern Community College District
2101 K Street
Bakersfield, CA 93305
Phone: 661-395-4728 Fax: 661-395-4757
jmilburn@bakersfieldcollege.edu
www.ccewd.net

In collaboration with:

WRDavis Collaborative
PO Box 1019, Davis, CA 95617
Ph: 916.806.6407 • Bill@WRDavisCollab.com

Strategic Partners:

The California Community Colleges Central Region Consortium

The California Central Valley Economic Development Corporation

California Manufacturers and Technology Association

California Workforce Investment Board

Employment Development Department, Labor Market Information Division

California Community Colleges Economic and Workforce Development Program

* The Business and Workforce Performance Improvement Initiative is a grant-funded project through the Economic & Workforce Development Program of the California Community Colleges. Our mission is to strengthen California's workforce and advance economic growth through education, training and job development.

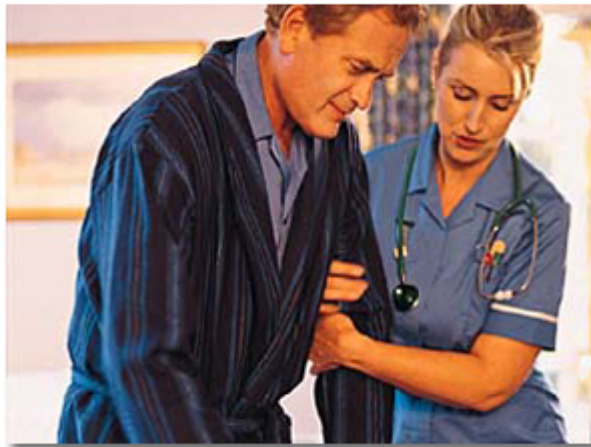


BUSINESS AND WORKFORCE PERFORMANCE IMPROVEMENT INITIATIVE

Executive Summary

Industry Scan Report San Francisco City and County

Health Care “Front-Line Occupations”



Prepared by:

**Center of Excellence, Bay Region
Hosted at City College of San Francisco**

September 2005

HEALTHCARE SUPPORT OCCUPATIONS WITHIN SAN FRANCISCO WILL GROW 10.5 % BY 2008, ADDING 850 NEW ENTRY-LEVEL JOBS TO THE WORKFORCE. WHEN OPENINGS DUE TO SEPARATIONS ARE INCLUDED, THIS NUMBER SWELLS TO 1,950 JOB OPENINGS BY 2008.

Executive Summary

The San Francisco Center of Excellence has identified a strategic opportunity for Bay Region community colleges in the area of health care support occupations. The current 8,080 Healthcare Support occupations in San Francisco will grow 10.5% and add 850 new entry level jobs to the labor market by 2008 (EDD/LMID SF Occupational Employment Projections 2001-2008). The new jobs will be positions such as nursing aides, home health aides, dental assistants, and medical assistants. A complete list of health care support occupations can be found on page 8 of this report.

The Centers of Excellence (COE) within the Business and Workforce Performance Improvement Initiative (BWPI) of the California Community College Economic and Workforce Development (CCCEWD) Program, have undertaken Environmental Scanning to provide targeted and valuable information to community colleges on high growth industries and occupations. This Environmental Scan is intended to provide colleges with information on which to base their response to the industry's workforce needs.

The Environmental Scan included a review of the California Regional Economies Project reports (*Northern California Economic Base Report*) and Employment Development Department (EDD) Labor Market Information (LMID) projections.

The following industry trends will impact the growth of health care support occupations:

- Over the next ten years in San Francisco, the population of people 55 and older is expected to increase 50%. For people 85 and older, the fastest growing segment of the population, projections are an increase of 100% over the same period. (U.S. Bureau of the Census).
- Managed care system consolidation is resulting in a large movement toward home and community -based care and away from facility-based care, shifting workers out of hospitals.
- Non-institutionalized settings (i.e. home and community-based care) require proportionately more direct-care staff.

- Overall, paraprofessional workers (i.e. nursing aides, home health aides, and medical assistants) provide about 80% of nursing home direct care and over 90% of formal home care.
- Increasing levels of consumer choice, competition and accountability
- Technological advancements requiring training for workers on new equipment.

The Center for Health Professions at UCSF stated in their 2003 report on the Allied and Auxiliary Health Care Workforce:

"The overriding challenge of the next decade will be to build partnerships among care delivery organizations, workers, and educators that allow institutions to create new approaches to health care that contain cost, increase quality and improve consumer satisfaction, while integrating the allied and auxiliary workforces into those new approaches, by cultivating their skills, creativity, loyalty and motivation."

Based on the information in this environmental scan, the Center of Excellence offers the following opportunities for Bay Region Community Colleges, specifically City College of San Francisco:

- Develop and expand partnerships with key healthcare industry associations, employers, labor unions and Workforce Investment Boards (WIBs) to respond to the training and education needs of front-line workers in the health services industry.
- Work with WIBs and key industry partners to secure funding for training both new students and incumbent workers - with a focus on closing the skills gap outlined in this report (see page 12) - so workers are prepared to fill the openings for healthcare support workers in San Francisco.
- Adapt delivery of existing programs, as appropriate, in Allied Health Care areas to help meet employers' need for skilled health care support workers.
- Market Contract Education services to Health Services employers to promote the college's ability to respond quickly to the workforce and training needs in the industry.

Community Colleges in the San Francisco Bay region, including City College of San Francisco, who develop partnerships with healthcare industry associations, employers and labor unions will benefit from their investment of time and resources by increasing FTES enrollments, contract revenue, and grants for the college. This opportunity is detailed within a full report along with reference to key data sources, a profile of the industry and specific training needs to address this opportunity. A request for the full report can be sent to jcarrese@ccsf.edu.

Acknowledgements

Prepared By:

The Bay Region Center of Excellence
Hosted at City College of San Francisco
Economic and Workforce Development
88 Fourth Street, San Francisco, CA 94103
Phone: (415) 267-6565 Fax: (415) 267-6536
jcarrese@ccsf.edu www.cccewd.net

Strategic Partners: Education and Government

San Francisco Workforce Investment Board
Employment Development Department, Labor Market Division.
California Community Colleges Economic and Workforce Development Program,
Health Care Initiative
The Center for the Health Professions at University of California, San Francisco
(UCSF)

The Business and Workforce Performance Improvement Initiative is a grant-funded project through the Economic & Workforce Development Program of the California Community Colleges. Our mission is to strengthen California's workforce and advance economic growth through education, training and job development.



CALIFORNIA
COMMUNITY
COLLEGES

**ECONOMIC &
WORKFORCE
DEVELOPMENT
PROGRAM**

BUSINESS AND WORKFORCE PERFORMANCE IMPROVEMENT INITIATIVE

Executive Summary Industry Scan Report Sonoma County

Tourism and Hospitality *“Tourism and Hospitality Careers”*



Prepared By:

**Center of Excellence, Bay Region
Hosted at City College of San Francisco**

September 2005

IT IS PROJECTED THAT THERE WILL BE 5,600 JOBS ADDED TO THE TOURISM AND HOSPITALITY INDUSTRY IN SONOMA COUNTY OVER THE NEXT FOUR YEARS, REPRESENTING A 25% INCREASE¹

Executive Summary

The Centers of Excellence within the Business and Workforce Performance Improvement Initiative of the California Community College Economic and Workforce Development program have undertaken Environmental Scanning to provide targeted and valuable information to community colleges on high growth industries and occupations. This Environmental Scan is intended to provide colleges with information on which to base their response to the industry's workforce needs.

The Strategic Opportunity for Sonoma County Community Colleges is to meet high-growth, high demand training needs in the hospitality and tourism industry by assisting colleges in providing a pipeline of candidates with basic training and skills, who can then have the opportunity to advance to well-paid positions. Every community college in California can participate in this response.

This Industry Scan includes a review of the California Regional Economies Project *Bay Area Economic Base Report* and *Northern California Economic Base Report* as well as California State Employment Development Department (EDD) Labor Market Information (LMID) data for Sonoma County. The scan also includes a review of United States Department of Labor (DOL) *Presidents High Growth Job Training Initiative* findings. In this process the Environmental Scan identifies a Strategic Opportunity for Community Colleges to meet the changing and high-demand training needs of the Tourism and Hospitality industry in Sonoma County.

Tourism and Hospitality is one of the top three leading major Base Industry sectors (industries supplying goods and services to areas outside the region and thus importing revenues) in Northern California Economic Region which consists of Del Norte, Humboldt, Lake, Lassen, Mendocino, Modoc, Nevada, Plumas, Sierra, Siskiyou, and Trinity counties (Northern California Economic Base Report, 2004, pp. 14 and 16). In 2005, it is also the fourth largest industry in Sonoma County.

¹ Sonoma County's Advantage in the Economic Recovery, 2004, pp. 40-41

Ranked by Highest Job Gain

www.labormarketinfo.edd.ca.gov

Sonoma County	1990	2004	Job Gain/Loss	Percent Change
Educational and Health Services	13,700	22,600	8,900	65.0%
Professional and Business Services	11,700	19,700	8,000	68.4%
Leisure and Hospitality	13,700	20,200	6,500	47.4%
Government	24,100	29,500	5,400	22.4%
Trade, Transportation and Utilities	28,700	34,000	5,300	18.5%
Manufacturing	20,200	24,300	4,100	20.3%
Construction	10,400	13,600	3,200	30.8%
Other Services	4,900	6,400	1,500	30.6%
Information	2,800	4,200	1,400	50.0%
Financial Activities	8,600	10,000	1,400	16.3%
Total Farm	5,600	5,900	300	5.4%
Natural Resources and Mining	500	300	-200	-40.0%

The *Sonoma County Tourism Indicator's Report Spring 2005* states that destination spending in Sonoma County is for the first time over \$1 billion, a 3% increase from 2002. During 2003, travel spending (one component of Tourism and Hospitality) in Sonoma County directly supported 15,180 jobs with earnings of \$327.4 million. The greatest number of jobs generated by travel spending is in accommodations (7,290), arts, entertainment and recreation (6,190 jobs), and retail (1,410 jobs). Between 2002 and 2003, Tourism-related employment increased by 0.8%, while local earning generated from travel spending increased 2.4%. In comparison, California Tourism accounted for an estimated 892,100 jobs, a 2.5% gain from 2003, and almost \$26.5 billion in annual earnings in 2004, a 5.6% increase from 2003. (pp. 4)

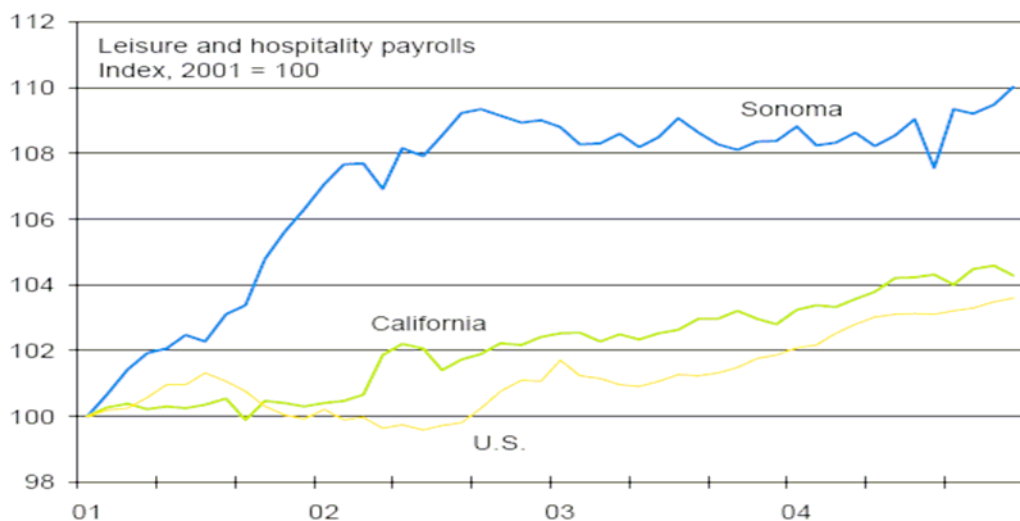
The Tourism and Hospitality industry in Sonoma County has in fact grown more rapidly than was projected by EDD for the period 2001-2008. EDD had estimated that the industry would grow by an average job growth of 2% per year yet it grew by 2,300 jobs (an annual average job growth of 13%) between 2000 and 2004. The *Sonoma County Tourism Indicator's Report Spring 2005* states that "now, with the U.S. recovery well ensconced, demand for leisure and hospitality services will be firm, which will support Sonoma County payrolls." (pp. 3). The 2004 *Sonoma County's Advantage in the Economic Recovery* report (pp. 39) projects that Tourism and Hospitality will reach 25,300 jobs by 2009 (4,167 new jobs or 19% growth). Additionally, EDD projects 900 separations (workers leaving careers in this industry) per year. Refer to Appendix 5 for more details.

While entry level jobs start off at a relatively low wage (\$6.75 per hour) a worker has the potential to move up to \$14 per hour or \$25,200 per year in three years. This level of earnings is near the estimated median earnings for Sonoma County of \$30,083 per year. Management positions have the potential earnings of \$50,000 per year.

A 2002 survey of Sonoma County Tourism and Hospitality related businesses identified that these businesses were having difficulties in locating and hiring both skilled and unskilled labor (Tourism Survey Report 2002, Section II –Survey Findings, prepared by the Sonoma County Economic Development Board, May 2004). The most recent Sonoma County *Tourism Indicator's Report* (2005) indicates that since that time the tourism industry has faced increasing demands as it recovered more rapidly from 9/11 than California and the nation as a whole. **This is a tremendous Strategic Opportunity for the community colleges to assist** in providing the industry with a pipeline of candidates with basic training and skills who will then have the opportunity to advance to well-paid positions. This will address the workforce needs of an important business to the Sonoma County Economy while also effectively helping workers find good jobs with good wages and promising career pathways.

Chart 1

Leisure Payrolls Look Well Supported



(Sonoma County Tourism Indicator Report 2005, Section II – Survey Findings)

This opportunity is detailed within a full report along with reference to key data sources, a profile of the industry and specific training needs to address this opportunity. A request for the full report can be sent to plyau@ccsf.edu.

Acknowledgements

Prepared By:

The Bay Region Center of Excellence
Hosted at City College of San Francisco
Economic and Workforce Development
88 4th Street, San Francisco, Ca 94103
Phone: (415) 267-6571 Fax: (415) 267-6536
plyau@ccsf.edu www.ccewd.net

Strategic Partners: Industry

Bill Davis, WRDavis Collaborative

Strategic Partners: Education and Government

Ben Stone, Executive Director
Sonoma County Economic Development Board

Cynthia Solorio, Labor Market Consultant
Employment Development Department, State of California

Stephanie Thompson, Director of Vocational Services
Santa Rosa Junior College

* The Business and Workforce Performance Improvement Initiative is a grant-funded project through the Economic & Workforce Development Program of the California Community Colleges. Our mission is to strengthen California's workforce and advance economic growth through education, training and job development.

Business & Workforce Improvement Initiative

Description of the BWPI Initiative:

The Business and Workforce Performance Improvement (BWPI) initiative is focused on building the capacity of the colleges in the area of economic and workforce development to enhance their ability to deliver education and training services to businesses and workers in high growth industries and new technologies.

The Centers of Excellence (COE) within BWPI provide information regarding workforce trends, increasing awareness and visibility about the colleges economic and workforce development programs and services, and building partnerships with business and industry.

The difference this will make to the colleges is that it will position them as the workforce partners of choice to business and industry and ensure that college programs are current and responsive. This will contribute to the overall economic vitality of the communities in which they serve.

How to Use an Industry Scan:

The Centers of Excellence within the Business and Workforce Performance Improvement Initiative of the California Community College Economic and Workforce Development Program have undertaken Industry Scanning to provide targeted and valuable information to community colleges on high growth industries and occupations.

A scan is intended to assist the decision-making process of California community college administrators and planners in addressing local and regional workforce needs and emerging job opportunities in the workplace as they relate to college programs. The information contained in the report can be used to guide program offerings, strengthen grant applications, and support other economic and workforce development efforts.

The full industry scan report is designed to provide current industry data that will:

- Define potential strategic opportunities relative to an industry's emerging trends and workforce needs;
- Influence and inform local college program planning and resource development; and
- Promote a future-oriented and market responsive way of thinking among stakeholders.

The Industry Scan included a review of the California Regional Economies Project reports and Employment Development Department (EDD) Labor Market Information (LMID) projections that cover the communities in the specific region, as well as many other sources as listed.

Important Disclaimer:

All representations included in this Industry Scan product/study have been produced from a secondary review of publicly and/or privately available data and/or research reports. Efforts have been made to qualify and validate the accuracy of the data and the reported findings. The purpose of the Industry Scan is to assist the California Community Colleges to respond to emerging market needs for workforce performance improvement. However, neither the Business and Workforce Performance Improvement Centers of Excellence, COE host college nor California Community Colleges Chancellor's Office are responsible for applications or decisions made by recipient community colleges or their representatives based upon this study including components or recommendations.