
2021 - 2024 Regional Plan

ORANGE REGIONAL PLANNING UNIT

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REGIONAL PLAN CONTENT

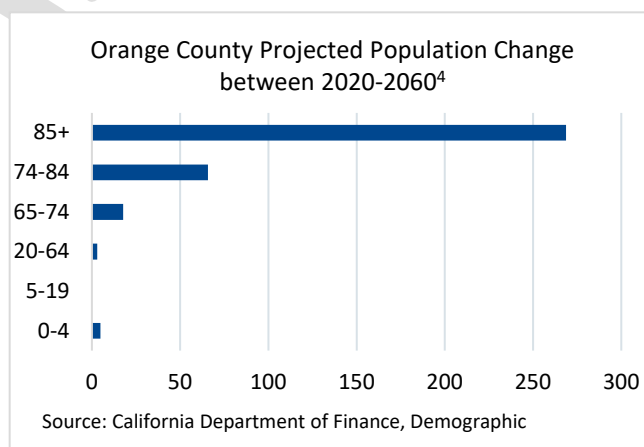
2A. ANALYTICAL OVERVIEW OF THE REGION

The Orange Regional Planning Unit (RPU) is comprised of three local Workforce Development Boards (WDBs) serving 34 cities and several large unincorporated areas in Orange County (OC). The RPU includes the Anaheim Workforce Development Board, which serves the City of Anaheim, the Santa Ana Workforce Development Board, which serves the City of Santa Ana, and the Orange County Workforce Development Board, which serves the remaining 32 cities and unincorporated areas of Orange County. Orange County is the third-most populous county in California (3,193,929 people)¹ and the sixth-most populous in the nation. The region's population has increased by 1.4% since 2015, growing by 44,649 people.

Orange County had experienced several years of job growth and economic vitality, resulting in record-low unemployment rates before the COVID-19 pandemic. The pandemic has since derailed this long streak of growth and the long-term social and economic impacts remain to be seen. Orange County's Gross Domestic Product (GDP) increased annually since 2009 to 269.2 billion in 2019.² Orange County's economy ranked 3rd in California and 8th nationally in 2018 based on its GDP. Orange County has employed 1,598,700 in nonfarm jobs as of December 2020. The median household income was \$85,400 in 2018, \$25,100 above the national average.³

Year	GDP
2015	\$ 225,178,787.00
2016	\$ 234,053,392.00
2017	\$ 247,314,645.00
2018	\$ 256,981,877.00
2019	\$ 269,229,776.00

Orange County is experiencing demographic shifts that have economic and workforce implications. Over the next several decades, Orange County's senior population will increase significantly while working-age populations fall. According to the California Department of Finance (DOF), estimates show seniors 65-74 will increase by 17.75%, 74-84 group by 65.7%, and 85 or older will increase by 268.7%. The population change will likely require increased employment in health care and other senior service occupations. Simultaneously, the shrinking working-age population could impact economic prosperity and cause more challenges for employers filling open positions.

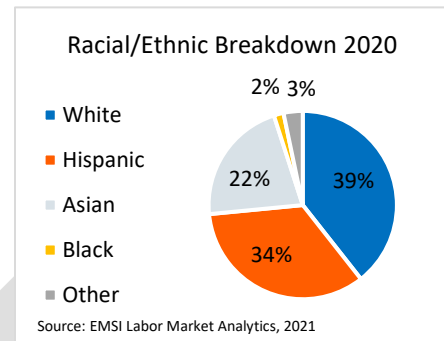


¹ EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

² "GDP: U.S. Bureau of Economic Analysis (BEA)." GDP | U.S. Bureau of Economic Analysis (BEA), www.bea.gov/data/gdp.

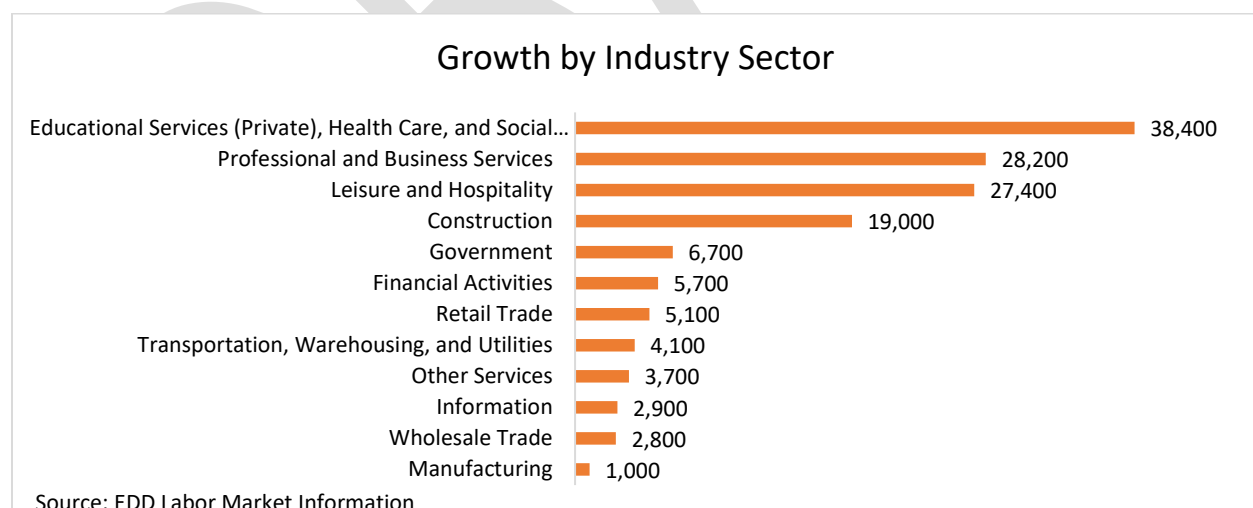
³ EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

Ethnic diversity in Orange County is high. The national average for an area the size of Orange County is 1,266,735 racially diverse people, while there are 1,910,690 in OC.⁴ Orange County's diversity is projected to continue to grow through 2060. Whites (39%) and Hispanics⁵ (34%) make up the largest percentage of the Orange County population, with the Hispanic population growth between 2015 and 2020 at 19%, while the white population declined by 4%.⁶ Growing diversity will increasingly be a key workforce and economic



development advantage for Orange County. Diversity often creates an environment where the exchange of ideas, strategies, and viewpoints fuel innovation and entrepreneurship, contributing to sustained economic success. Racial diversity challenges local education providers and workforce development to support English learners' success by improving program support and creating innovative programs such as vocational ESL programs. Non-English language speakers represent 45.5% of Orange County residents, which is higher than the national average of 21.9%. In 2018, Spanish was the most common non-English language spoken, with 24.8% of Orange County residents being native Spanish speakers. Vietnamese (6.44%) and Chinese (2.94%) are the second and third most common languages.⁷

Industry employment which includes self-employment, private household workers, farm and nonfarm jobs in Orange County, is projected to reach 1,853,600 by 2026, a 9.3% increase over the ten-year projection period of 2016 to 2026. Twelve of the 13 nonfarm industry sectors are projected to grow during this period.



Total nonfarm jobs are projected to gain 145,000 jobs by 2026. Significant job growth is projected in four industry sectors with educational, health services, and social assistance, leading to

⁴EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

⁵EMSI Labor Market Analytics, 2021, www.economicmodeling.com, Hispanic population includes all races that identify as Hispanic.

⁶EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

⁷Bureau, US Census. "American Community Survey Data Releases." *The United States Census Bureau*, 31 July 2020, www.census.gov/programs-surveys/acs/news/data-releases.2018.html.

expected gains of 38,400 jobs, with 17,300 projected to be in ambulatory health care services. Professional and business services is projected to add 28,200. Leisure and hospitality is projected to grow by 12.9%, adding 27,400 jobs. Construction is projected to add 19,000 with 13,700 of the jobs in the specialty trades subsector.⁸

The top five fastest-growing industry sectors are construction (19.5%), health care and social assistance (18.9%), leisure and hospitality (12.9%), information (11%), and professional and business services (9.5%).⁹

The industry sectors that added the most jobs between 2017 and 2020 are represented in the chart below.

NAICS	Description	2017 Jobs	2020 Jobs	2017 - 2020 Change
62	Health Care and Social Assistance	196,290	209,045	12,755
56	Administrative and Support and Waste Management and Remediation Services	153,583	162,612	9,029
54	Professional, Scientific, and Technical Services	151,234	156,909	5,674
55	Management of Companies and Enterprises	33,320	37,935	4,616
23	Construction	121,891	125,428	3,537

Source: EMSI Labor Market Analytics, 2021

Orange County is a thriving hub for medical device companies and cutting-edge industry sectors, including life sciences, information technology, digital arts and media, and advanced manufacturing. It is also known for its growing ecosystem of entrepreneurship and innovation. Many Southern California startups work on virtual and augmented reality, cybersecurity, biomedical science, bioengineering, medical imaging, medical device, and environmental health technologies. Over the next several years, Orange County is poised to be at the center of emergent industries based on educational and intellectual assets in the region. The county's most robust traded clusters with a high employment specialization in the area are medical device manufacturing (US Ranking 1), lighting and electrical equipment manufacturing (US Ranking 2), apparel manufacturing (US Ranking 3), information technology and analytical instruments manufacturing (US Ranking 5), and financial services (US Ranking 6).¹⁰

2Ai. Provide an analysis of current employment and unemployment data.

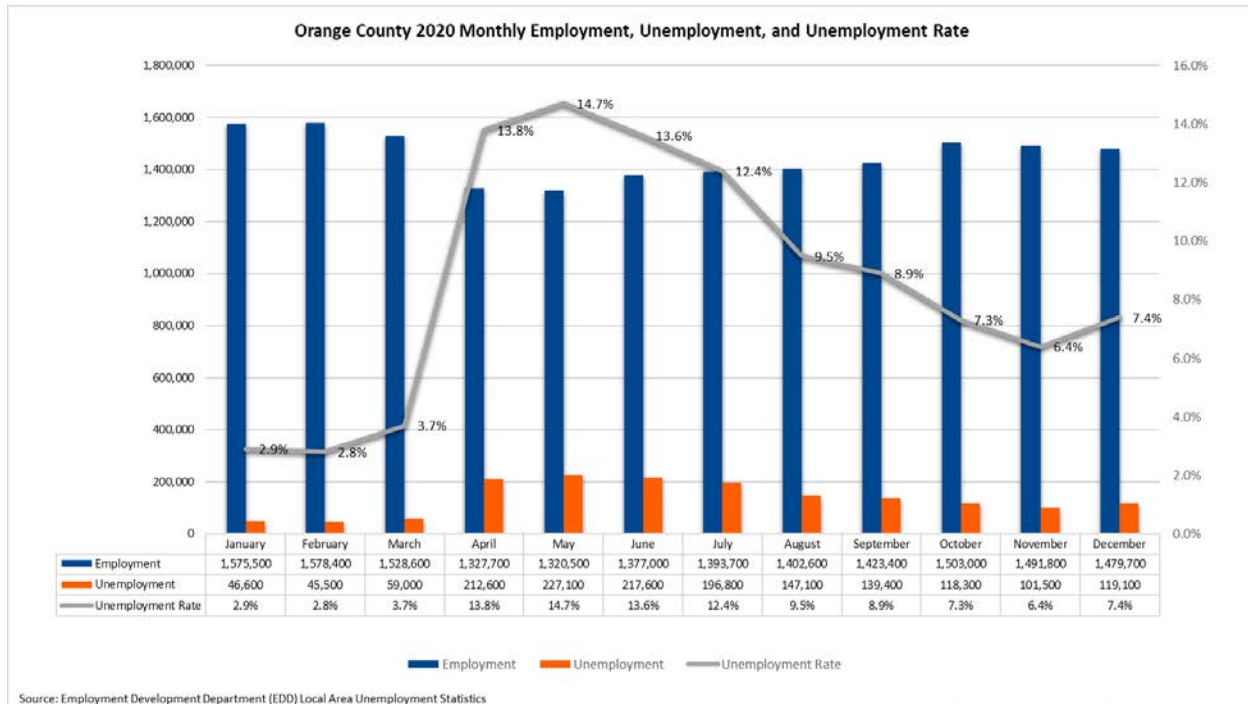
Orange County had a positive economic outlook before the impacts of the COVID-19 pandemic. In January of 2020, Orange County had an unemployment rate of 2.9%, the lowest in Southern California. In the preceding 12 months, the county's unemployment rate had not exceeded 3.1%. Before California's first statewide stay-at-home order issued in March, closing all nonessential businesses and restaurant dining, the unemployment rate stood at 2.8% in February of 2020. The economic disruption from COVID-19 resulted in steep job losses, with the unemployment rate quadrupling at its peak of 14.7% in May 2020, the highest unemployment rate ever recorded for

⁸ Labor Market Information, EDD, 2021, www.labormarketinfo.edd.ca.gov

⁹ Labor Market Information, EDD, 2021, www.labormarketinfo.edd.ca.gov

¹⁰ "U.S. Cluster Mapping: Mapping a Nation of Regional Clusters." U.S. Cluster Mapping | Mapping a Nation of Regional Clusters, www.clustermapping.us/.

Orange County. The rates slowly declined to 6.4% in November 2020 before ascending to 7.4% in December 2020 when regional stay-at-home orders went back into effect. This rate compares with an unadjusted unemployment rate of 8.8 percent for California and 6.5 percent for the nation during the same period.¹¹

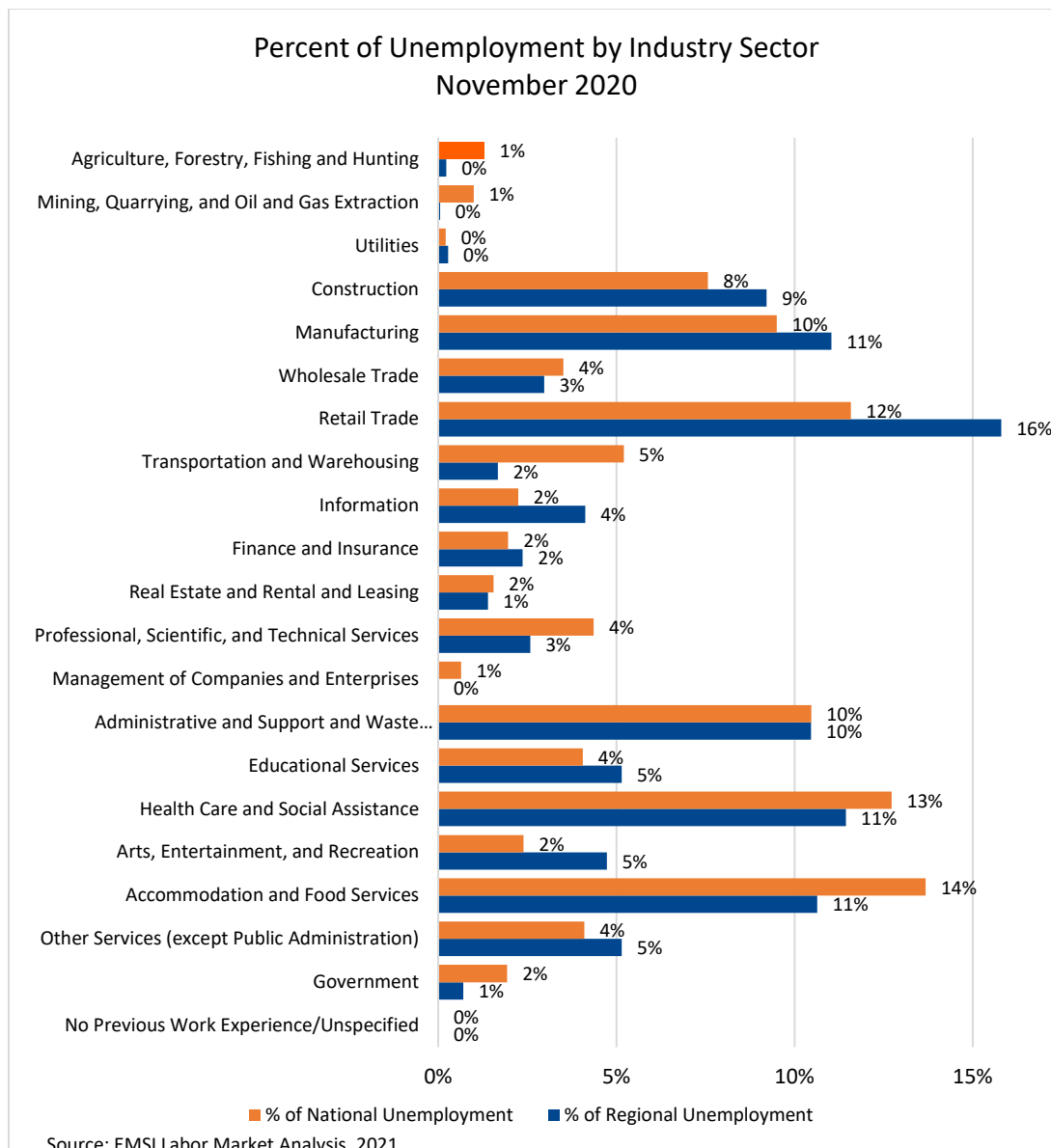


Concentrated job loss in hospitality and tourism stung more sharply in the Orange County region due to its economic dependence on tourism. In 2019, a record 50.2 million travelers visited Orange County, spending \$13.0 billion¹², however with the continued closure of major tourism sites, especially Disneyland Park, the leisure and hospitality industry and surrounding cities remain heavily impacted. The percent of unemployment by industry sector shows a grim picture for industries that rely heavily on tourism. As of November 2020, retail trade had the highest unemployment numbers at 16,063, and accommodation and food services had 10,815 unemployed. Other industries with high numbers of unemployment include Health Care and Social Assistance (11,628), Manufacturing (11,215), Construction (9,371).¹³

¹¹ Labor Market Information, EDD, 2021, www.labormarketinfo.edd.ca.gov/data/lmi-by-subjects.html.

¹² Orange County Visitors Association, 2019, *Orange County Visitors Association 2019-2021 Destination Marketing Plan*, www.travelcostamesa.com/visittheoc/wp-content/uploads/2019/08/Marketing.pdf.

¹³ EMSI Labor Market Analytics, 2021, www.economicmodeling.com.



The pandemic-induced recession caused a loss of 267,600 nonfarm jobs between February and April in Orange County. The employment loss between March and April of 2020 alone was 225,800, the largest ever recorded in a single month. All industry sectors experienced declines between February and April, but leisure and hospitality (down 102,800) accounted for 38 percent of the total nonfarm job loss during this period¹⁴. Most of the decline was between March and April, with a loss of 90,300 jobs. Seventy-seven percent of the drop occurred in accommodation and food services (down 70,300 jobs), led by decreases in food services and drinking places (down 59,800 jobs). Other significant drops during this period include arts, entertainment, and recreation, which fell by 20,000 jobs. Trade, transportation and utilities decreased by 31,400 jobs, with retail trade accounting for 66 percent of the decline (down 20,800 jobs). Wholesale trade dropped by 8,800 jobs, and transportation, warehousing and utilities decreased by 1,800

¹⁴ Labor Market Information, EDD, 2021, www.labormarketinfo.edd.ca.gov/data/lmi-by-subjects.html.

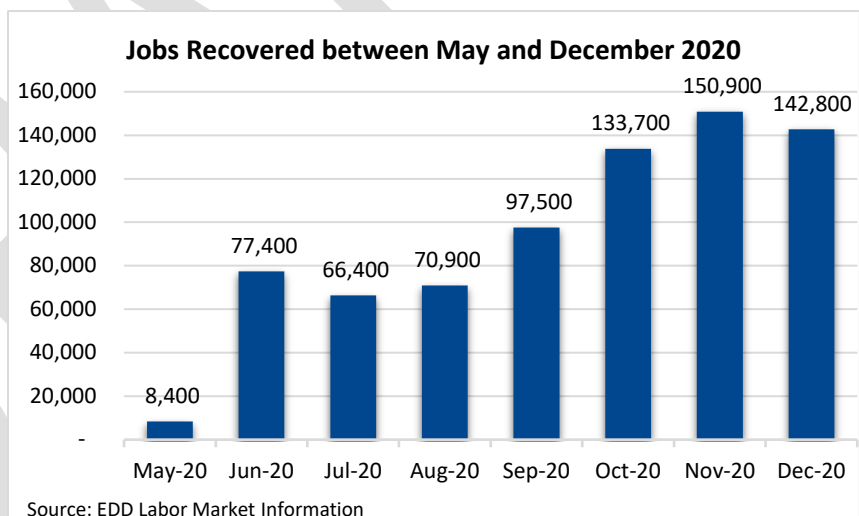
jobs. Professional and business services declined by 29,200 jobs. Administrative and support services, which includes temporary help firms, dropped by 18,900 jobs.¹⁵

Pandemic Job-Related Losses ¹⁶

Industry	Feb-20	Mar-20	Apr-20	Dec-20	Feb to Apr	% change	April to December	% of losses recovered	Shortfall as of December
Total Nonfarm	1,677,800	1,636,000	1,410,200	1,553,000	-267,600	15.9%	142,800	53.4%	124,800
Construction	105,400	100,600	96,800	107,900	-8,600	8%	11,100	129%	-2,500
Manufacturing	158,700	157,500	143,200	145,300	-15,500	9.8%	2,100	13.5%	13,400
Transportation & Warehousing	26,700	26,300	24,300	29,600	-2,400	9.0%	5,300	220.8%	-2,900
Professional & Business Services	326,300	313,300	288,400	318,400	-37,900	12%	30,000	79%	7,900
Educational Services	34,500	34,400	31,100	27,600	-3,400	9.9%	-3,500	-102.9%	6,900
Health Care & Social Assistance	200,600	198,800	172,600	196,400	-28,000	14.0%	23,800	85.0%	4,200
Leisure & Hospitality	227,500	215,000	124,700	168,700	-102,800	45.2%	44,000	42.8%	58,800
Other Services	50,800	44,400	33,000	41,100	-17,800	35.0%	8,100	45.5%	9,700
Government	168,700	170,500	162,000	156,100	-6,700	4.0%	-5,900	-88.1%	12,600

As California moves toward reopening, regional differences will contribute to the pace of recovery. The current depth of job losses and Orange County's reliance on service sectors means the region will have more ground to make up. How quickly businesses reopen and rehire will depend on their viability and how public health risks evolve within the area. For sectors and companies that rely on in-person interaction,

the recovery pace is likely to be slower. As of December 2020, the county recovered 142,800 nonfarm jobs, which is equivalent to 53% of the job losses since the pandemic recession. Most industries are experiencing incremental job gains monthly. Transportation and utilities and construction jobs have exceeded pre-pandemic levels, with the largest month-over increase, up 4,200 jobs. Wholesale trade gained 1,800 jobs, retail trade added 1,500 jobs, and transportation, warehousing and utilities expanded by 900 jobs.¹⁷

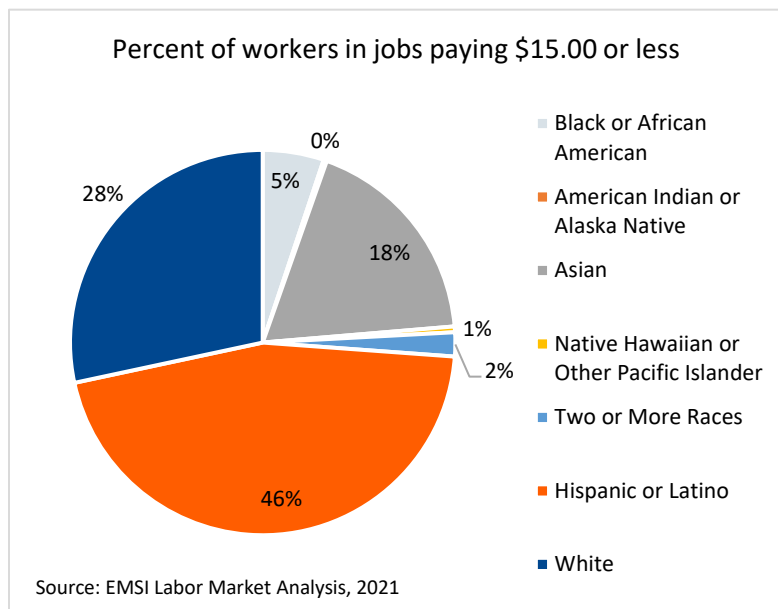


¹⁵ Labor Market Information, EDD, 2021, <https://www.labormarketinfo.edd.ca.gov/geography/orange-county.html>

¹⁶ EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

¹⁷ Labor Market Information, EDD, 2021, www.labormarketinfo.edd.ca.gov/data/lmi-by-subjects.html.

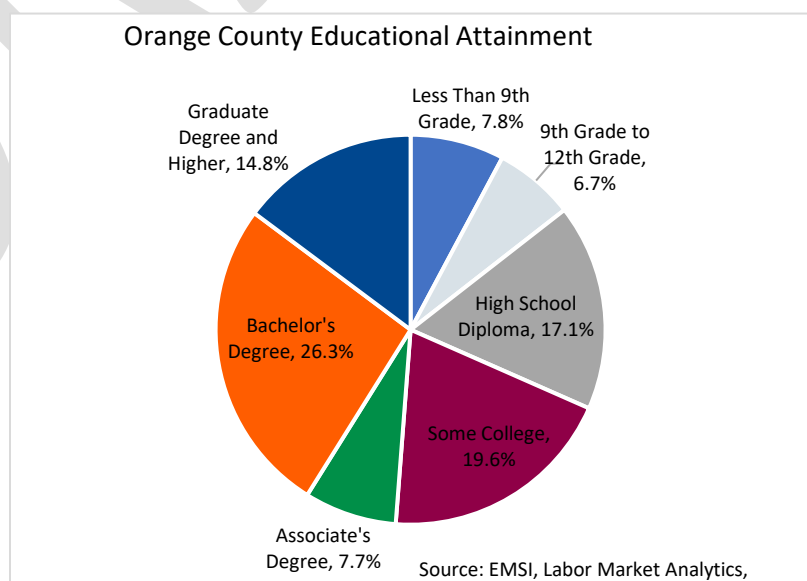
According to Opportunity Insight's Economic Tracker, the drastic difference between the low and high quartiles shows that lower-income bracket workers are disproportionately affected by the pandemic. In Orange County, as of November 15, 2020, employment rates among workers in the bottom wage quartile (<\$27K) decreased by 25.4%, middle quartile (\$27K-\$60K) decreased by 1.4%, and high quartile (>\$60K) increased 6.8% compared to January 2020¹⁸. Minority residents mostly held these lower-paying jobs and went into this economic crisis much more financially insecure and unstable.



2Aii. Provide an analysis of the current educational and skill levels of the workforce, the current needs of employers in the region, and any relevant skill gaps between the two.

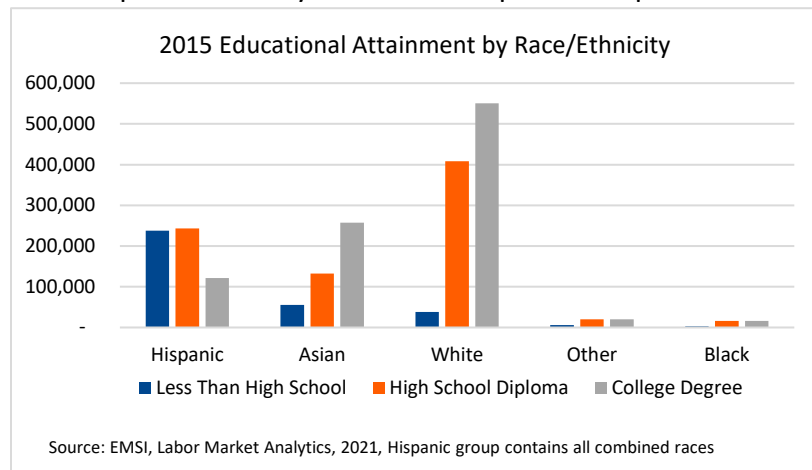
Orange County is home to major universities such as the University of California, Irvine (UCI), California State University, Fullerton (CSUF), and Chapman University. It has four community college districts with nine community colleges. These community colleges educate approximately 310,000 students in credit and noncredit courses each year.

Orange County's primary competitive advantage is a talent pool of highly educated, qualified residents. In Orange County, 48.8% of adults over the age of 25 have an associate degree or higher, while only 14.5% lack a high school diploma. Orange County residents who possess a bachelor's degree are 6.3% above the national average, and 7.7% hold an associate degree, which is 0.9% below the national average.



¹⁸ "The Economic Tracker." Economic Tracker, tracktherecovery.org/.

Education data covers the population aged 25 years or older, indicating the highest level of education achieved. Inequitable access to postsecondary education is a persistent problem. One way in which this manifests is through widely varying educational attainment across race and ethnicity. California's Post-secondary to Prosperity Dashboard shows only 16% of Latinx residents hold a four-year degree. The dashboard also shows that most Latinx residents have no college experience (59%), greater than all other groups.¹⁹




The most popular majors in Orange County are Liberal Arts and Sciences (21,289 and 25%), Business Administration and Management (8,251 and 10%), and General Psychology (8,251 and 3%).

Orange County Regional Institutions Program Completions²⁰

CIP Code	Program	Completions (2015)	Completions (2016)	Completions (2017)	Completions (2018)	Completions (2019)
24.0101	Liberal Arts and Sciences/Liberal Studies	9,762	10,444	11,289	11,990	21,289
52.0201	Business Administration and Management, General	7,093	7,993	7,914	7,758	8,251
42.0101	Psychology, General	2,145	2,208	2,138	2,462	2,637
30.0101	Biological and Physical Sciences	1,045	1,210	1,134	1,440	1,918
51.3801	Registered Nursing/Registered Nurse	1,366	1,523	1,731	1,655	1,844
9.0101	Speech Communication and Rhetoric	1,325	1,401	1,541	1,524	1,601
45.1101	Sociology	1,041	1,025	1,141	1,286	1,281
11.0701	Computer Science	592	840	929	1,132	1,274
26.0101	Biology/Biological Sciences, General	1,101	1,056	1,015	1,083	1,200
12.041	Nail Technician/Specialist and Manicurist	865	1,195	1,230	870	1,163

Employer need in the Orange County region is based on job posting and employment data analysis, and educational programs' completions. Per the two-digit Standard Occupational Classification (SOC) code group, there are twenty-four occupations


610 Programs
 1,639 programs can train for this job, while only 610 programs have produced completers in this region.


86,656 Completions (2019)
 The completions from all regional institutions for all degree types.


196,852 Openings (2019)
 The average number of openings for an occupation in the region is 261.

¹⁹ "P2P Regions." *California Competes*, californiacompetes.org/p2p/regions?region=orange.

²⁰ *EMSI Labor Market Analytics*, 2021, www.economicmodeling.com.

and 610 programs in the region of study that may train for these occupations. Of these programs, there were 86,656 program participant completions in 2019 and 196,852 job openings that needed to be filled.

Identified in the table below are the occupations with the highest projected skills gap for Orange County between 2015 and 2025. This analysis indicates a continued need to identify strategies to fulfill training needs in various high-gap occupational areas. The research includes data based on the following:

- Occupations where the 2020 median income hourly wage is higher than \$16.00 an hour
- Openings greater than 10 (openings represent replacement jobs and Bureau of Labor Statistics(BLS) growth estimates)
- Entry-level education that was greater than a postsecondary nondegree award and equal to or less than a bachelor's degree
- Top 15 occupations with a skills gap greater than zero (skills gap is the difference between the projected openings and completions)
- The Openings figure estimates the change in growth and replacement jobs (Growth + Replacements = Openings). Growth captures the change in the total number of workers employed in an occupation. At the same time, replacement jobs are estimates of workers permanently leaving a career and needing to be replaced by new hires. A combination of both numbers indicates total openings.

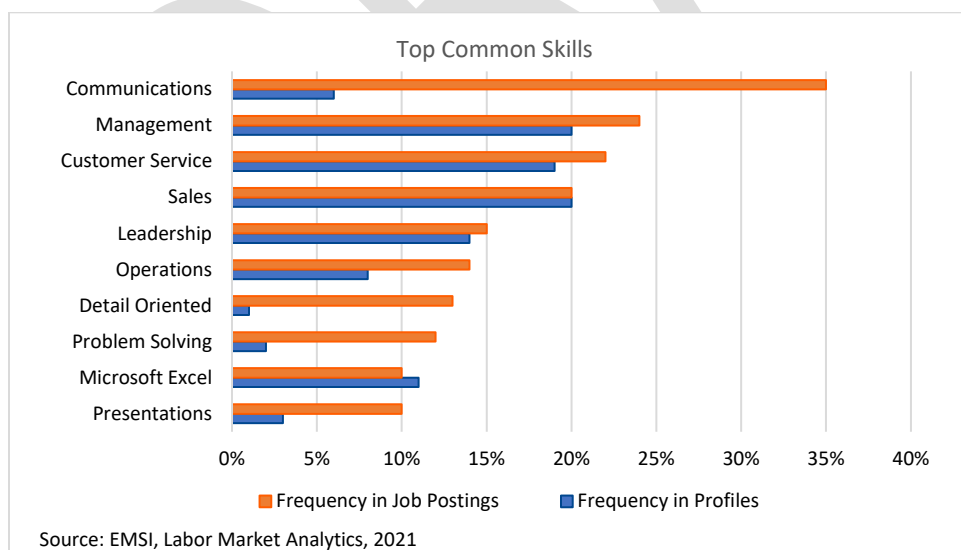
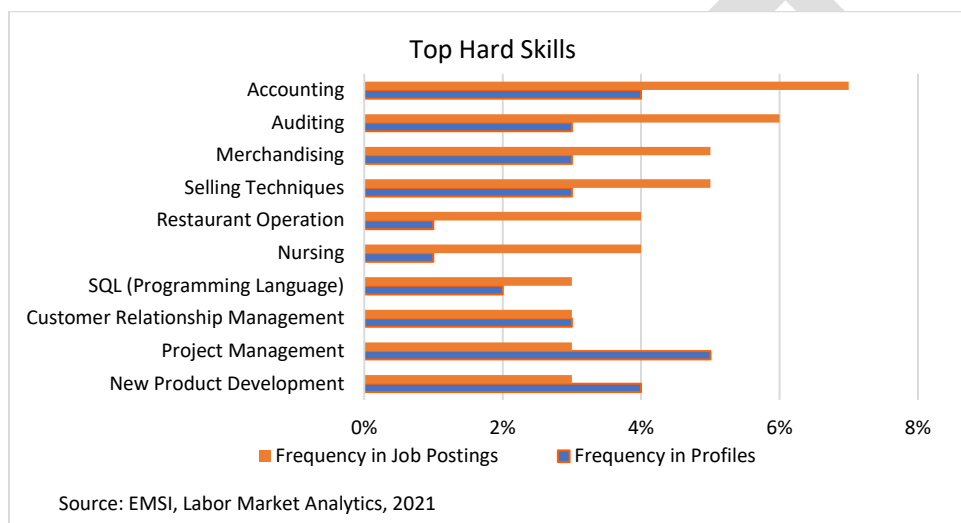
Skills Gap by Occupation²¹

SOC	Description	2020 Jobs	2025 Jobs	2020 - 2025 Change	2020 - 2025 Replacement Jobs	2020 - 2025 Openings	Regional Completions (2019)	Skills Gap	Median Hourly Earnings	Typical Entry Level Education
43-3031	Bookkeeping, Accounting, and Auditing Clerks	20,984	20,603	(381)	11,058	13,243	676	12,567	\$22.58	Some college, no degree
25-9045	Teaching Assistants, Except Postsecondary	11,752	12,207	455	5,678	7,391	45	7,346	\$17.63	Some college, no degree
53-3032	Heavy and Tractor-Trailer Truck Drivers	10,600	10,908	308	5,433	6,891	133	6,758	\$22.92	Postsecondary nondegree
31-1131	Nursing Assistants	9,546	10,594	1,049	5,118	7,441	1,178	6,263	\$16.75	Postsecondary nondegree
31-9092	Medical Assistants	8,628	9,548	920	4,476	6,496	2,156	4,340	\$17.62	Postsecondary nondegree award
31-9011	Massage Therapists	4,714	5,489	775	2,556	4,013	1,097	2,916	\$16.96	Postsecondary nondegree
23-2011	Paralegals and Legal Assistants	4,308	4,662	354	2,143	3,009	174	2,835	\$22.87	Associate degree
49-3023	Automotive Service Technicians and Mechanics	6,645	6,526	(119)	2,867	3,435	608	2,827	\$21.99	Postsecondary nondegree
31-9091	Dental Assistants	5,617	5,799	182	2,846	3,648	1,295	2,353	\$19.39	Postsecondary nondegree
43-4151	Order Clerks	3,576	3,337	(240)	1,826	2,211	41	2,170	\$17.34	Some college, no degree
49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	3,944	4,182	238	1,727	2,354	262	2,092	\$29.66	Postsecondary nondegree
15-1232	Computer User Support Specialists	7,826	8,244	418	2,690	3,724	1,647	2,077	\$26.56	Some college, no degree
29-2061	Licensed Practical and Licensed Vocational Nurses	6,214	6,894	680	2,254	3,520	1,506	2,014	\$28.94	Postsecondary nondegree

²¹ EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

SOC	Description	2020 Jobs	2025 Jobs	2020 - 2025 Change	2020 - 2025 Replacement Jobs	2020 - 2025 Openings	Regional Completions (2019)	Skills Gap	Median Hourly Earnings	Typical Entry Level Education
49-2022	Telecommunications Equipment Installers and Repairers, Except Line Installers	2,327	2,099	(228)	1,119	1,331	0	1,331	\$29.93	Postsecondary nondegree
17-3023	Electrical and Electronic Engineering Technologists and Technicians	2,202	2,217	15	919	1,122	1	1,121	\$30.84	Associate degree

The top three hard skills requested by employers in job postings between January 2020 to January 2021 were accounting, auditing, and customer relationship management. The following charts show the top common hard skills and the top common skills in relation to the frequency these skills appeared in job seeker profiles.



2Aiii. Provide an analysis of industries and occupations with an emerging demand.

The RPU analyzed location quotient, total jobs, and competitive effect data to identify industries and occupations with an emerging demand. An analysis of location quotient data demonstrated which occupations and industries are unique and specialized in the Orange County region (compared to the national average). The competitive effect indicates how much of the job change results from some unique competitive advantage in the area. The competitive effect measures the job change that cannot be explained by national growth and industry mix. The change in competitive effect points to regional-specific factors on the change in local employment numbers. Factors such as labor force training and education, skills, transportation, supply chains, aging demographics, and other regionally influenced factors may impact these industries and occupations' competitiveness.

Using the 3-digit NAICS code, the emerging industries identified had a location quotient that increased between 2015 and 2020 and had a location quotient less than 1.2. The industry list was filtered to include industries with a competitive effect greater than 1, percent change in jobs higher than 10%, and more than 1,000 jobs.

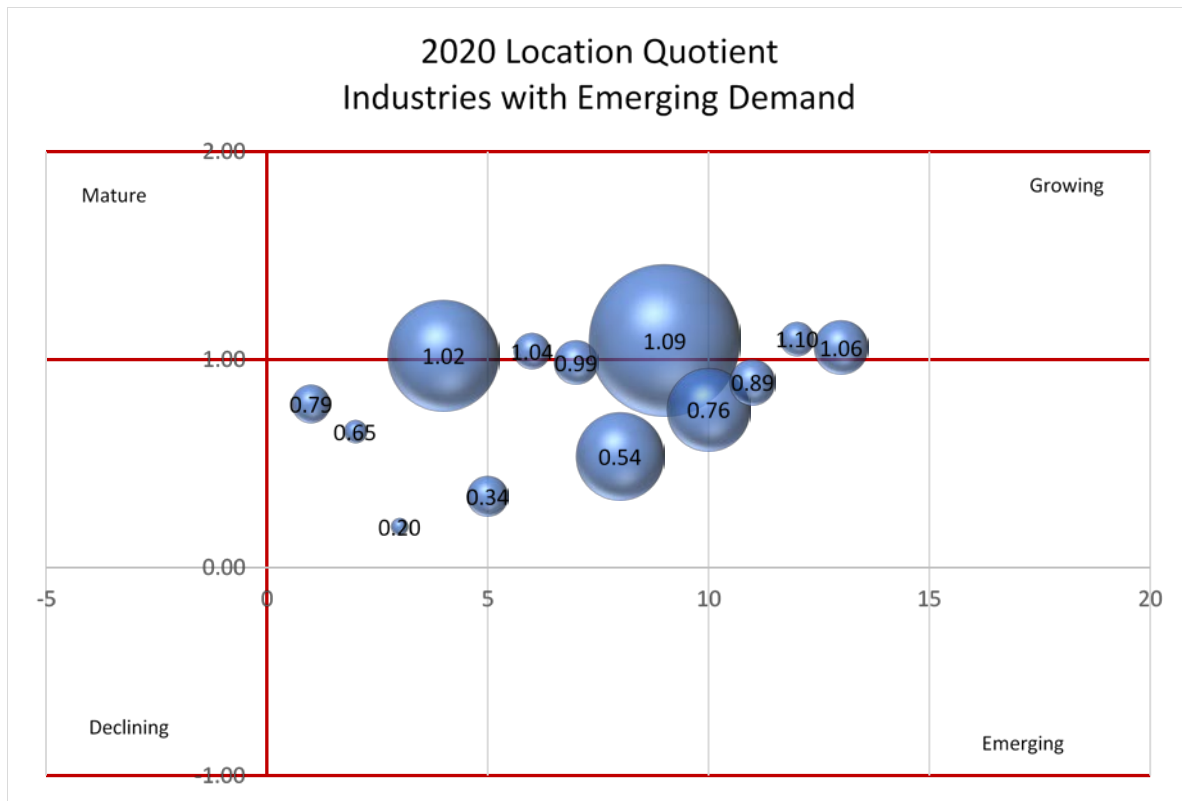
The following chart consists of a list of the top thirteen emerging industries in Orange County. This combined list of sectors accounted for 273,362 jobs in 2020. This group of industries is projected to grow to 327,315 jobs by 2030.

Mature	Growing
Location Quotients are greater than 1.2 and steadily decreasing	Location Quotients are greater than 1.2 and steadily increasing
Declining	Emerging
Location Quotient is less than 1.2 and steadily decreasing	Location Quotient is less than 1.2 and steadily increasing

Industries with Emerging Demand

NAICS	Description	2015 Jobs	2020 Jobs	2015 - 2020 Change	2015 - 2020 % Change	Competitive Effect	2015 Location Quotient	2020 Location Quotient	% Change in LQ
485	Transit and Ground Passenger Transportation	4,245	6,136	1,891	45%	1,209	0.64	0.79	14.56%
312	Beverage and Tobacco Product Manufacturing	1,551	2,080	529	34%	125	0.62	0.65	3.04%
481	Air Transportation	827	1,091	264	32%	197	0.16	0.20	3.29%
624	Social Assistance	41,749	50,822	9,072	22%	3,690	0.96	1.02	6.02%
484	Truck Transportation	5,604	6,621	1,017	18%	841	0.30	0.34	3.92%
562	Waste Management and Remediation Services	4,665	5,385	720	15%	158	1.02	1.04	1.58%
454	Nonstore Retailers	6,937	7,948	1,011	15%	273	0.97	0.99	2.00%
902	State Government	28,208	32,308	4,100	15%	3,552	0.48	0.54	5.19%
621	Ambulatory Health Care Services	84,699	96,614	11,915	14%	3,346	1.07	1.09	2.24%
623	Nursing and Residential Care Facilities	25,146	28,413	3,267	13%	2,887	0.69	0.76	6.72%
325	Chemical Manufacturing	7,473	8,441	968	13%	595	0.84	0.89	5.07%
337	Furniture and Related Product Manufacturing	4,263	4,802	540	13%	646	0.97	1.10	13.38%
446	Health and Personal Care Stores	10,942	12,253	1,312	12%	1,524	0.94	1.06	11.82%

Source: EMSI, Labor Market Analytics, 2021



The following is a list of the top occupations in Orange County with emerging demand. These occupations have a location quotient of less than 1.2 as of 2020. The location quotient has increased since 2015. The competitive effect is positive in these professions, demonstrating a high degree of regional-specific factors influencing job growth.

SOC	Description	2015 Jobs	2020 Jobs	2015 - 2020 Change	2015 - 2020 % Change	Median Hourly Earnings	Competitive Effect	2015 Location Quotient	2020 Location Quotient	% Change in LQ
31-1100	Home Health and Personal Care Aides; and Nursing Assistants, Orderlies, and Psychiatric Aides	30,483	54,644	24,161	79%	\$13.52	20,036	0.59	0.91	0.33
19-5000	Occupational Health and Safety Specialists and Technicians	574	877	303	53%	\$40.62	142	0.59	0.70	0.10
21-1000	Counselors, Social Workers, and Other Community and Social Service Specialists	17,852	24,920	7,068	40%	\$23.94	5,082	0.77	0.96	0.18
33-1000	Supervisors of Protective Service Workers	1,127	1,383	256	23%	\$33.60	64	0.37	0.38	0.01
25-9000	Other Educational Instruction and Library Occupations	16,127	19,323	3,196	20%	\$18.30	1,792	0.85	0.93	0.07
53-3000	Motor Vehicle Operators	29,104	34,733	5,629	19%	\$19.04	3,050	0.61	0.66	0.05
53-2000	Air Transportation Workers	1,013	1,205	192	19%	\$45.77	115	0.28	0.31	0.03
11-9000	Other Management Occupations	39,256	46,246	6,991	18%	\$43.06	2,157	0.98	1.01	0.03
45-1000	Supervisors of Farming, Fishing, and Forestry Workers	94	111	17	17%	\$29.59	19	0.15	0.18	0.03
47-4000	Other Construction and Related Workers	3,271	3,835	564	17%	\$28.06	292	0.70	0.74	0.05

SOC	Description	2015 Jobs	2020 Jobs	2015 - 2020 Change	2015 - 2020 % Change	Median Hourly Earnings	Competitive Effect	2015 Location Quotient	2020 Location Quotient	% Change in LQ
51-8000	Plant and System Operators	1,618	1,842	224	14%	\$39.74	263	0.45	0.52	0.07
45-3000	Fishing and Hunting Workers	81	91	10	12%	\$19.64	24	0.19	0.26	0.07
53-7000	Material Moving Workers	76,369	85,529	9,160	12%	\$14.41	2,204	1.06	1.07	0.01
39-1000	Supervisors of Personal Care and Service Workers	2,551	2,841	290	11%	\$17.43	99	0.96	0.98	0.02
29-1000	Healthcare Diagnosing or Treating Practitioners	47,605	52,687	5,082	11%	\$51.85	906	0.79	0.79	0.00
39-9000	Other Personal Care and Service Workers	21,724	23,853	2,130	10%	\$14.05	2,621	0.81	0.90	0.09
25-1000	Postsecondary Teachers	17,453	19,004	1,551	9%	\$42.07	1,599	0.87	0.93	0.07
49-9000	Other Installation, Maintenance, and Repair Occupations	28,031	30,368	2,337	8%	\$22.97	643	0.83	0.83	0.01
33-2000	Firefighting and Prevention Workers	1,783	1,918	136	8%	\$40.45	110	0.48	0.50	0.02
21-2000	Religious Workers	4,340	4,639	299	7%	\$29.84	166	0.84	0.85	0.02
51-3000	Food Processing Workers	6,764	7,042	278	4%	\$14.06	198	0.76	0.77	0.01
45-4000	Forest, Conservation, and Logging Workers	116	120	4	4%	\$14.14	4	0.14	0.15	0.00
37-2000	Building Cleaning and Pest Control Workers	48,275	49,995	1,720	4%	\$14.85	3,534	1.01	1.07	0.06

Source: EMSI, Labor Market Analytics, 2021

2B. FOSTERING DEMAND-DRIVEN SKILLS ATTAINMENT

2Bi. Identify the in-demand industry sectors or occupations for the region.

The Orange RPU has identified four priority industry sectors (or industry clusters) with a substantial current and potential impact on the regional economy based on labor market information. Advanced manufacturing, health care, information communication technology and digital media, and retail, hospitality and tourism contribute to the growth and stability of other supporting businesses, industry sectors, and jobs that lead to economic self-sufficiency and advancement opportunities for Orange County residents.

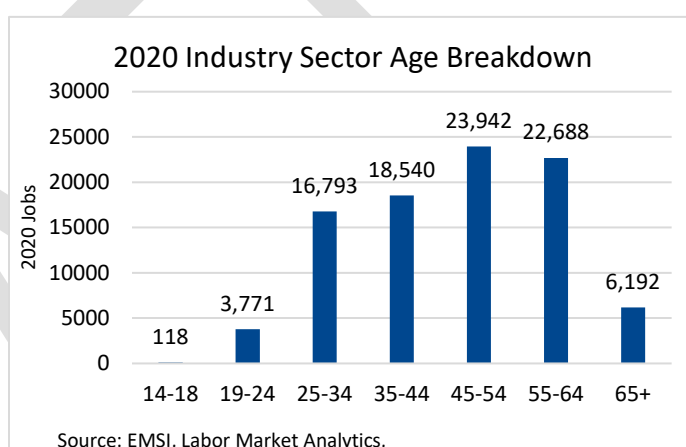
NAICS industry codes included in each sector

Industry	NAICS
Advanced Manufacturing	3240, 3251-54, 3259, 3271, 3279, 3311, 3313, 3315, 3331-3333, 3336, 3339, 3341-3346, 3351-3353
Healthcare	621,622,623
Information and Communications Technology (ICT)/Digital Media	51, 5415
Retail, Hospitality, & Tourism	44, 45, 71,72

The Advanced Manufacturing sector has 92,045 full and part-time jobs. The average earnings per job in 2020 was \$122,840. There were 2,169 payrolled businesses in the Orange County region in 2020. The industry growth between 2017 and 2020 was .9%, below the state average of 1.9%. Regardless of this slight upward percentage movement, manufacturing has been on the decline in the region and the nation. The expected change between 2020 to 2030 is -5.2%, with a loss of 4,741 jobs. Automation, change in skills required to perform new tasks, import competition, and a decrease in mobility are all reasons cited as contributions to the decline.

Despite the declining jobs, advanced manufacturing is a priority in the Orange RPU due to the number of jobs and the impact on the local economy, given the sector's total gross regional product (GRP) of \$23.8 billion. This sector represents approximately 10% of the county's total GRP. The advanced manufacturing sector has highly specialized and growing advanced manufacturing subsectors in Orange County. Medical equipment and supplies manufacturing had a concentration in the Orange County region five times higher than typical regional areas, with a location quotient of 5.43. Medical equipment and supplies manufacturing also increased jobs by 12% between 2015 and 2020, bringing the total employment in 2020 to 19,776. Other healthy and growing subsectors in the region are semiconductor and other electronic component manufacturing (LQ 3.28), audio and video equipment manufacturing (LQ 4.89), semiconductor and Other Electronic Component Manufacturing (LQ 3.28), and Manufacturing and Reproducing Magnetic and Optical Media (LQ 3.12), aerospace product and parts manufacturing (LQ 1.95).

Manufacturing companies will need a skilled worker pipeline to fill jobs in these specialized subsectors and retirement positions. The sector has an aging workforce regionally and nationally. Workers 65 and older represent 6.7% of the workers, and 24.6% are between 55 and 64. Recruiting and retaining a high-quality workforce for new technology-driving positions will be necessary for manufacturing innovation. There are multiple opportunities at various entry points for individuals with a high school diploma, a certification program, or a 2-4 year college degree.



The Healthcare sector has 158,224 full and part-time jobs. The average earnings per job in 2020 was \$77,496. There were 11,248 private and public healthcare establishments in the Orange County region in 2020. The industry growth between 2017 and 2020 was 5.4%, above the state's growth percentage of 5.2%. The expected change between 2020 to 2030 is 18.2%, with a gain of 28,832 jobs. The sector contributes \$15.5 billion in GRP, 9% of the county's total GRP. The healthcare sector comprises several related subsectors and supporting industries that include ambulatory health care services, hospitals, and nursing and residential facilities. The healthcare sector is growing and continues to be a stalwart industry throughout the pandemic. Healthcare is one of the few recession-proof industries, with registered nurses being the top posted occupation between January 2020 to 2021²². The sector will likely continue to be a driver of economic activity given the rapidly aging Orange County population, increasing the likelihood that many residents will require more health care and support services.

²² EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

The ICT/Digital Media (ICT) sector has 54,096 full- and part-time jobs. Computer programming services, computer systems design services, and software publishers have the highest number of jobs in the county, at 33,410 jobs combined. The average earnings per job in 2020 was \$132,987. There were 4,545 payrolled business locations in the Orange County region in 2020. The industry growth between 2017 and 2020 was 0.8%, below the nation's percentage of 3.5%. The expected job growth between 2020 to 2030 is 7.1%, with a gain of 3,849 jobs. The sector contributes \$16.1 billion in GRP, 11% of the county's total GRP. The technology sector accounts for a significant portion of Orange County's economic activity, as economies, jobs, and personal lives become more digital and automated. The ICT sector develops innovative services and products that impact all industries in a region. The ICT applications can be seen in manufacturing with computer simulation and the healthcare industry with the rise of telemedicine and telehealth. Training and upskilling of existing staff in the industry will be crucial in ensuring regional competitiveness.

The Retail, Hospitality, and Tourism sector has 369,332 full- and part-time jobs, making it the largest targeted sector of the RPU. The average earnings per job were \$39,625 in 2020. There were 19,500 payrolled establishments in the Orange County region in 2020. The number of jobs declined by 5.9% between 2017 and 2020. The state and the nation declined by 5.7% during the same period. The expected change between 2020 to 2030 is a growth of 3.0% and 11,153 job gains. The sector contributes \$26.2 billion in GRP, 10% of the county's total GRP. According to the Orange County Visitors Association, OC welcomed 50.2 million visitors who spend 413 billion dollars in 2019. This sector is part of Orange County's DNA and was hit the hardest by the pandemic's effects. The industry sector is diverse and includes hotels, restaurants, entertainment venues, cultural attractions, sports parks, theme parks, food establishments, retail stores, and other venues. The industries with the highest numbers of jobs in 2020 were full-service restaurants (60,461), limited-service restaurants (52,828), and amusement and theme parks (27,368).

Often the jobs within these industries are characterized by low-wages. The industry has historically offered entry-level employment opportunities to new immigrants and candidates with a high school diploma. While many jobs exist in lower-paid, entry-level classifications, there are many opportunities to secure positions offering higher compensation. The challenge is ensuring those in entry-level positions obtain additional job-specific skills and English language skills necessary to qualify for promotional opportunities. Sector strategies and incumbent worker training are workforce development strategies that can play an essential role in lifting people up from lower-wage jobs.

2Bii. Describe how the RPU and regional partners will expand or develop, and then implement sector initiatives for those in-demand industry sectors or occupations.

Orange RPU started the regions sector partnership work under the Slingshot grant. The RPU engaged John Melville, a national leader in the design and practice of next-generation industry engagement. John Melville's initial work guided the launch of Industry Sector Partnerships (ISP) in the RPU's four priority sectors using the Next Gen Sector Partnership model. The first

collaboration meetings occurred just before the COVID-19 pandemic. These meetings represented a starting point for a partnership that will deepen and grow over the next several years. The RPU had participation from core partners, employers, chambers, and unions. The Orange RPU regional organizer will continue to lead the sector partnership work.

The goal of the RPU sector partnership strategy is three-fold:

1. Conduct regular sector meetings with employers to identify common industry priorities, address shared vitality issues, and understand hiring and training needs to create a pipeline of qualified candidates in growing sectors.
2. Develop workforce strategies in partnership with adult education, community colleges, and other partners that include mapping career pathways, work-based learning, and apprenticeship programs.
3. Unify and coordinate business engagement efforts by all partners to minimize duplication of efforts, minimize employer fatigue, and promote systemic change that benefits the industry, workers, and the community.

To address upward income mobility and improve economic self-sufficiency, continuous and authentic industry leadership and shifts in workforce strategies are needed to transition low-skill job seekers into middle-skill careers and address underemployment in the region. The pandemic has slowed the industry sector's work progress. The RPU is still committed to re-engaging employers and partners and building upon the industry sector work started.

The RPU will work jointly with the Los Angeles/Orange County Regional Consortium (LAOCRC) as the lead sector strategy convening team. LAOCRC serves as a regional framework to communicate, coordinate, collaborate, promote and plan career and technical education and workforce and economic development in the Los Angeles/Orange County Region. In Orange County, LAOCRC includes nine community colleges and one stand-alone continuing education (noncredit) center within four community college districts. LAOCRC Regional Consortium has identified separate priority sectors for each subregion. Orange County community college sectors are shown below. Four of the community college sectors align with the Orange RPU priority industry sectors; however, the RPU changed the titles to match those of the community college to ensure no confusion on the region's priority industries.

Priority Sectors for the OC Region

Sectors	Community Colleges	Orange RPU
Advanced Manufacturing	✓	✓
Advanced Transportation & Logistics	✓	
Life Sciences/Biotech	✓	
Business and Entrepreneurship	✓	
Energy, Construction, and Utilities	✓	
Healthcare	✓	✓
ICT/Digital Media	✓	✓
Retail, Hospitality, & Tourism	✓	✓

In partnership with LAOCRC, the RPU will expand sector partnerships by working with Orange County chambers of commerce and other community and educational partners to identify additional core team members who will support strengthening industry sector partnerships. Orange County has many state, county, and local civic organizations, four community college school districts, twenty-seven K-12 school districts, California State University and University of California systems, and numerous other public and private stakeholders with a vested interest in workforce and economic development. Such a large number of stakeholders requires a great deal of commitment from the core group to build deep, sustainable relationships resulting in career pathways and a steady pipeline of workers within our identified priority sectors.

This core team will be responsible for developing and carrying out an action plan that provides a strategic and coordinated effort to unify business engagement efforts, identify and engage industry champions, other businesses, and support partner organizations. The core team will relaunch sector meetings in the four sectors to gather information about the challenges and opportunities. After the initial meetings, employers will be invited to regular meetings to set goals to address their needs and take actions with the partners on those goals. Meetings and agendas will be employer-driven, and actions taken will create a pipeline of qualified candidates who meet industry needs for in-demand occupations.

Although the RPU has started using the Next Gen model, fidelity is not as important as determining the appropriate strategies tailored to the Orange County regional economy, industry sectors, and worker populations. The RPU will schedule industry sector group meetings, and the groups will begin to identify strategies, design appropriate programs and services, and then move into the implementation of sector projects. Implementation will likely include a mix of basic strategies that include:

- Training and skills development to bring new employees into specific industries and occupations
- Business development
- Incumbent worker training
- Labor market and industry research
- Restructuring of work environments to improve recruitment, hiring, training, compensation, and retention strategies
- Integrating two or more of these strategies in a multifaceted approach

2C. ENABLING UPWARD MOBILITY FOR ALL CALIFORNIANS

2Ci. Describe how the RPU will prioritize working with employers who provide quality jobs that provide economic security through family-sustaining wages and comprehensive benefits. This should include whether the RPU has, or plans to develop, a formal policy related to job quality.

The Orange RPU is committed to identifying strategies that improve the workforce system, ensuring that it enables economic growth and shared prosperity for employers and employees. The California Workforce Development Board defines quality jobs as employment that provide

family-sustaining wages, health benefits, a pension, worker advancement opportunities, and collective worker input and are stable, predictable, safe, and free of discrimination. The local boards are attuned to the pandemic's increased impact on residents in lower-paying jobs and the increasing national attention given to those in low-wage jobs and who face increased inequality. The RPU and regional partners work tirelessly to move unemployed and underemployed individuals, especially those with barriers to employment, into higher-paying jobs with benefits.

Before the pandemic, Orange County's unemployment numbers were historically low. But unfortunately, low unemployment did not mean all Orange County residents were thriving. Based on the two hundred and sixty-sixth percentile (266%) of the 2020 Federal Poverty Levels, the self-sufficiency standard in Orange County is \$23.89 an hour for a family size of 2. Low-wage workers have suffered the most in this pandemic-induced recession. In 2020, 741,966 of the 1,805,612 jobs (42%) had an average wage of less than \$20.00 an hour. The majority of these jobs (511,322) were held by minority workers, with Hispanics holding the largest share of these lower-wage jobs (46%). Massive job losses have been concentrated among lower-wage workers in retail, hospitality and tourism, and food service jobs.

The region's targeted industry sectors show potential for family-sustaining wages but are not immune to offering lower wages. Such jobs are a big part of the Orange County regional economy, given its large footprint in the retail, hospitality, and tourism industry. While some of these entry-level occupations in targeted industry sectors have well-articulated career pathways to a job with self-sustaining wages, each of the professions provides foundational skills that will better qualify individuals for enhanced employment and income opportunities. Aspen Institute's work on sectoral workforce development strategies identified two fundamental approaches to helping people connect to better employment:

- 1) removing barriers to good jobs for low-income people and
- 2) improving the quality of jobs in key sectors in which many low-income people work²³.

The RPU and regional partners understand the importance of developing strategies that accomplish both. Through industry sector work, the RPU is committed to ensuring that job training is a bridge to more financial stability and not a funnel for low-skill individuals into low-wage occupations.

The Orange RPU understands its role in investing in and advocating for quality jobs. The RPU will develop a standard tool for determining job quality to assess what industries, companies, and jobs to target. The RPU will prioritize working with employers who provide quality jobs and those interested in improving their job quality and being part of moving low-wage workers into better-paying positions. The RPU will develop business engagement protocols that focus on engaging businesses that provide quality jobs or have an interest in improving job quality. The RPU will work with industry sector business leaders to ask questions and begin conversations around job

²³ Maureen Conway et al., *Sectoral Strategies for Low-Income Workers: Lessons from the Field* (Washington, DC: Aspen Institute, October 1, 2007), <https://www.aspeninstitute.org/publications/sectoral-strategies-low-income-workers-lessons-field/>

quality, helping businesses understand how workforce investments can improve their competitive advantage.

Through sector work, the RPU will work with the businesses and regional partners to identify entry-level positions and develop career pathways with multiple entry and exit points, ensuring individuals understand their path to self-sufficiency. The RPU will review high-road employment practices and strategies, such as the National Fund's Design Framework, to design better jobs. Their approach meets employers where they are and supports them along a continuum of improvement. Lastly, the RPU will target limited dollars for on-the-job training and incumbent worker training towards quality jobs that provide upward mobility.

2Cii. Describe how the RPU and regional partners will work together to identify shared target populations and develop targeted service strategies

The one-stop delivery system provides the local boards and partners the framework to continue and advance discussions of how workforce programs can be more effective, efficient, and aligned. The regional partners recognize that the answers will only come when we step out of our respective silos. The RPU and partner organizations have identified and are currently addressing the needs of shared target populations that include English language learners, justice-involved individuals, individuals with disabilities, Veterans, and disconnected and foster youth. A recurring theme in our planning meetings was that organizations seeking to serve these populations feel they would benefit from better linkages with other organizations doing the same work or complementary work.

The RPU has regularly scheduled meetings to address service delivery and performance for all but one of these targeted groups, English language learners. During the regional planning meetings, the local boards and partners shared promising practices to address English language learners' specific challenges. The group discussed two distinct subcategories, those with low skills and education and those with higher skills and educational degrees from other countries. The RPU and partners made commitments to reconvene to discuss how we can collectively improve service delivery to English language learners and determine if other populations warrant different workforce development strategies to serve them more effectively.

2Ciii. Describe how the RPU and regional partners will work with employers and training providers to ensure that historically unserved and underserved communities have equal access to the regional sector pathways, earn and learn opportunities, supportive services, and other approaches identified by the RPU. This should include whether the RPU has, or plans to develop, a formal policy related to equity.

The RPU and regional partners will ensure historically unserved and underserved populations have equal access to regional sector career pathways and other services and support through sector partnerships. Through sector partnership work, the RPU and partners will have the opportunity to work with employers to create career pathways that help mitigate the many challenges unserved and underserved populations face in completing educational goals and

moving into employment with family-sustaining wages. Workforce development programs and supports should not be designed as a one-size-fits-all solution. The populations we serve are diverse, and program designs should reflect this diversity if we are going to close the skills gap and combat economic inequality. Career pathways are a service-delivery model that can close achievement gaps and advance racial equity by helping individuals build skills over time. Career pathways are a long-term approach to serving individuals with limited basic skills or other employment barriers that the local boards are committed to developing.

Sector partnership work will also provide an opportunity for the RPU to address issues such as degree inflation that tend to exclude minorities from jobs during the hiring process. According to Manjari Raman, director of Harvard Business School's project on Managing the Future of Work, degree inflation refers to jobs that historically required more than a high school diploma or less than a college degree but now require a college degree²⁴. Explicitly requiring degrees for positions instead of the jobs' skills exacerbates the effect of racial disparities in educational achievement and eliminates workers who may have acquired the skills in other ways. Also, through sector partnership work, other hiring practices that disproportionately affect minorities, such as automatically excluding potential employees using criminal background checks and credit checks, can be discussed.

Another strategy that the sector partnerships will address is creating work-based learning programs and pre-apprenticeship programs. Pre-apprenticeships can be valuable for people of color who have been historically underrepresented in apprenticeships. Work-based learning programs can provide vital formal access to employers that the population may not have had when relying on their existing professional and social networks.

During the regional planning meetings, two general themes surfaced every session. One was how some people lacked access to OC One-Stop services and the second issue was the lack of digital literacy and access to broadband services. These are issues that the pandemic has exacerbated. Attendees discussed how transportation and childcare needs, and a general lack of understanding of the services available, contribute to preventing a large percentage of those most in need of assistance from accessing them. The local boards recognize specific populations require more outreach and require unique methods and strategies for locating, attracting, and retaining their participation in workforce programs. The Orange County Board recently purchased a mobile unit equipped with 12 computers inside and a monitor outside for presentations. The mobile unit is accessible by wheelchair by using the wheelchair lift. The mobile unit will serve as a mobile One-Stop Center for the Orange County community. During the regional planning meetings, the local boards discussed options for deploying the mobile unit to low-income communities, areas not close to a comprehensive One-Stop Center, and partner locations to increase access and awareness of services. Also, the partners will explore developing and using outreach and communication responsive to the targeted populations. The boards and partner agencies will also explore additional referral agreements and referral processes with

²⁴ Morgan, Kate. "Degree Inflation: How the Four-Year Degree Became Required." BBC Worklife, BBC, 28 Jan. 2021, www.bbc.com/worklife/article/20210126-degree-inflation-how-the-four-year-degree-became-required#:~:text=Corbett%20is%20a%20victim%20of,Managing%20the%20Future%20of%20Work.

other organizations that can be engaged as partners to serve targeted people in their communities. Disadvantaged and vulnerable populations need increased support services, multiple service strategies, co-enrollment in additional programs, referrals to community service providers, and a team approach to succeed in the labor market.

Broadband internet access is necessary for participants to complete enrollment applications, financial aid applications, and work requirements. Job openings are now almost exclusively accessible via the internet. Many job search websites are not fully accessible to mobile phone users. The digital divide between people who have broadband internet access and those who have no access or cell phone-only access is also a huge barrier to accessing post-secondary education and entering the workforce. The RPU and regional partners have discussed the need for partners to collectively address the digital divide and commit to convening a workgroup to address this issue.

The RPU has had informal conversations on strategies to address issues related to equity. The boards are committed to continuing the dialogue on regional equity issues and policy development related to equity.

2D. ALIGNING, COORDINATING, AND INTEGRATING PROGRAMS AND SERVICES

2Di. Describe any regional service strategies, including use of cooperative service delivery agreements or MOU.

A cooperative service agreement has been established between the three local boards to solidify the commitment to the overall workforce and economic development of the OC Region through system alignment, integration of service delivery, and leverage/braiding of funding. The regional boards have a very active and healthy partnership. Regional service strategies include:

- Improve and enhance customer experience by ensuring staff receives ongoing professional development training and cross-training
- Meet the needs of employers by implementing and scaling career pathways
- Improve the quality of the workforce by improving alignment and partner connections
- Align investments in targeted populations and industry sectors
- Expand opportunities for employers and participants to engage in integrated learning and work experience activities
- Sharing resources and braiding funds for tools and services that support the region as a whole

2Dii. Describe any regional administrative cost arrangements, including the pooling of funds for administrative costs for the region.

The three boards in the Orange County RPU collaborate on multiple projects, with one or the other board acting as the fiscal agent. The RPU does not have any overarching arrangements or intent to pool funds for administrative costs at this time.

Orange County RPU's goal is to better align workforce services with economic development, educational institutions, and business. The boards will consider administrative costs arrangements if it allows the RPU to accomplish the objectives of the RPU more efficiently.

DRAFT

APPENDICES:

3A. STAKEHOLDER AND COMMUNITY ENGAGEMENT SUMMARY

DRAFT

3B. PUBLIC COMMENTS RECEIVED THAT DISAGREE WITH THE REGIONAL PLAN

DRAFT

3C. SIGNATURE PAGE

ORANGE COUNTY REGIONAL PLANNING UNIT

The regional plan represents the Orange Regional Planning Unit efforts to maximize and coordinate resources available under Title I of the Workforce Innovation and Opportunity Act. This regional plan, inclusive of a unified local plan, is submitted for the period July 1, 2021, through June 30, 2024, in accordance with the provisions of WIOA.

LOCAL BOARD CHAIRS

ORANGE COUNTY WORKFORCE DEVELOPMENT BOARD

Signature

Teri Hollingsworth

Name

Chair, Orange County Workforce Development Board

Title

Date

ANAHEIM WORKFORCE DEVELOPMENT BOARD

Signature

Joe Paquette

Name

Chair, Anaheim Workforce Development Board

Title

Date

SANTA ANA WORKFORCE DEVELOPMENT BOARD

Signature

Stacey Sanchez

Name

Chair, Santa Ana Workforce Development Board

Title

Date

LOCAL ELECTED OFFICIALS

COUNTY OF ORANGE BOARD OF SUPERVISORS

Signature

Andrew Do

Name

Chair, Orange County Board of Supervisors

Title

Date

CITY OF ANAHEIM COUNCIL

Signature

Harry Sidhu

Name

Mayor, City of Anaheim

Title

Date

CITY OF SANTA ANA COUNCIL

Signature

Vicente Sarmiento

Name

Mayor, City of Santa Ana

Title

Date

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REGIONAL PLAN CONTENT

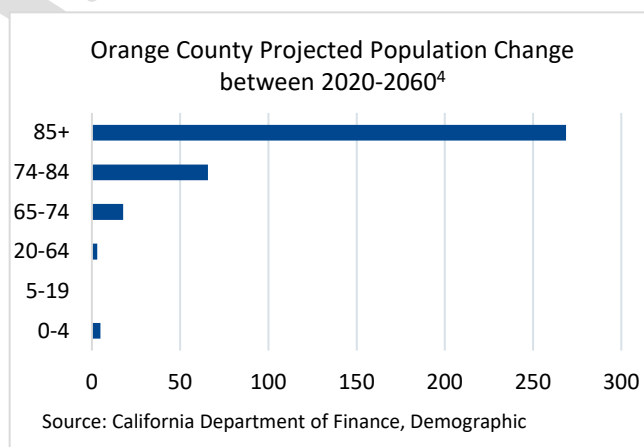
2A. ANALYTICAL OVERVIEW OF THE REGION

The Orange Regional Planning Unit (RPU) is comprised of three local Workforce Development Boards (WDBs) serving 34 cities and several large unincorporated areas in Orange County (OC). The RPU includes the Anaheim Workforce Development Board, which serves the City of Anaheim, the Santa Ana Workforce Development Board, which serves the City of Santa Ana, and the Orange County Workforce Development Board, which serves the remaining 32 cities and unincorporated areas of Orange County. Orange County is the third-most populous county in California (3,193,929 people)¹ and the sixth-most populous in the nation. The region's population has increased by 1.4% since 2015, growing by 44,649 people.

Orange County had experienced several years of job growth and economic vitality, resulting in record-low unemployment rates before the COVID-19 pandemic. The pandemic has since derailed this long streak of growth and the long-term social and economic impacts remain to be seen. Orange County's Gross Domestic Product (GDP) increased annually since 2009 to 269.2 billion in 2019.² Orange County's economy ranked 3rd in California and 8th nationally in 2018 based on its GDP. Orange County has employed 1,598,700 in nonfarm jobs as of December 2020. The median household income was \$85,400 in 2018, \$25,100 above the national average.³

Year	GDP
2015	\$ 225,178,787.00
2016	\$ 234,053,392.00
2017	\$ 247,314,645.00
2018	\$ 256,981,877.00
2019	\$ 269,229,776.00

Orange County is experiencing demographic shifts that have economic and workforce implications. Over the next several decades, Orange County's senior population will increase significantly while working-age populations fall. According to the California Department of Finance (DOF), estimates show seniors 65-74 will increase by 17.75%, 74-84 group by 65.7%, and 85 or older will increase by 268.7%. The population change will likely require increased employment in health care and other senior service occupations. Simultaneously, the shrinking working-age population could impact economic prosperity and cause more challenges for employers filling open positions.

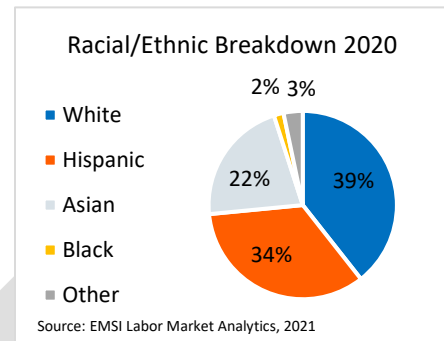


¹ EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

² "GDP: U.S. Bureau of Economic Analysis (BEA)." GDP | U.S. Bureau of Economic Analysis (BEA), www.bea.gov/data/gdp.

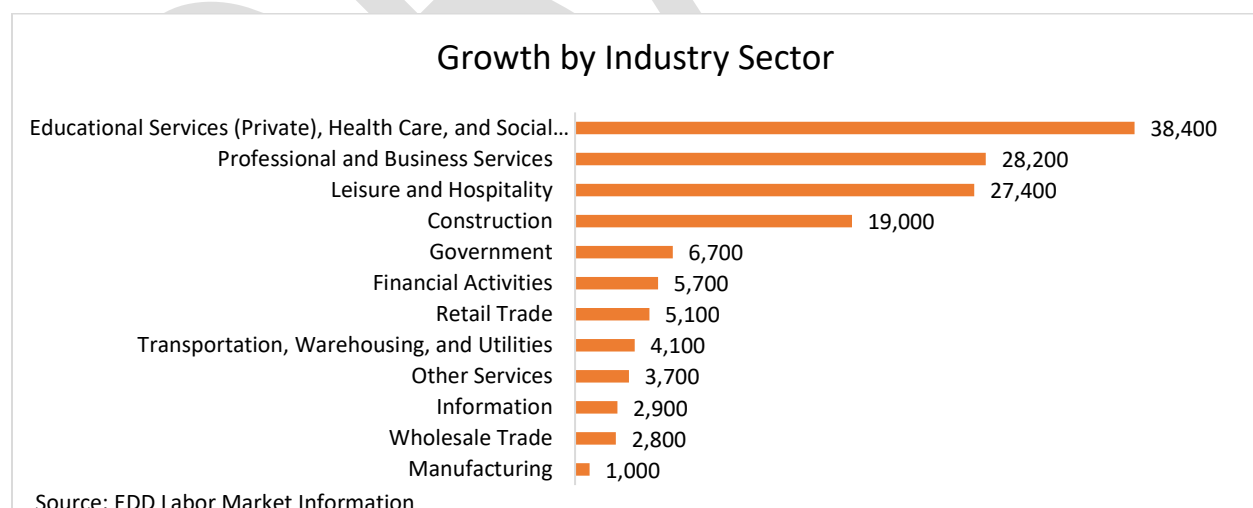
³ EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

Ethnic diversity in Orange County is high. The national average for an area the size of Orange County is 1,266,735 racially diverse people, while there are 1,910,690 in OC.⁴ Orange County's diversity is projected to continue to grow through 2060. Whites (39%) and Hispanics⁵ (34%) make up the largest percentage of the Orange County population, with the Hispanic population growth between 2015 and 2020 at 19%, while the white population declined by 4%.⁶ Growing diversity will increasingly be a key workforce and economic



development advantage for Orange County. Diversity often creates an environment where the exchange of ideas, strategies, and viewpoints fuel innovation and entrepreneurship, contributing to sustained economic success. Racial diversity challenges local education providers and workforce development to support English learners' success by improving program support and creating innovative programs such as vocational ESL programs. Non-English language speakers represent 45.5% of Orange County residents, which is higher than the national average of 21.9%. In 2018, Spanish was the most common non-English language spoken, with 24.8% of Orange County residents being native Spanish speakers. Vietnamese (6.44%) and Chinese (2.94%) are the second and third most common languages.⁷

Industry employment which includes self-employment, private household workers, farm and nonfarm jobs in Orange County, is projected to reach 1,853,600 by 2026, a 9.3% increase over the ten-year projection period of 2016 to 2026. Twelve of the 13 nonfarm industry sectors are projected to grow during this period.



Total nonfarm jobs are projected to gain 145,000 jobs by 2026. Significant job growth is projected in four industry sectors with educational, health services, and social assistance, leading to

⁴EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

⁵EMSI Labor Market Analytics, 2021, www.economicmodeling.com, Hispanic population includes all races that identify as Hispanic.

⁶EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

⁷Bureau, US Census. "American Community Survey Data Releases." *The United States Census Bureau*, 31 July 2020, www.census.gov/programs-surveys/acs/news/data-releases.2018.html.

expected gains of 38,400 jobs, with 17,300 projected to be in ambulatory health care services. Professional and business services is projected to add 28,200. Leisure and hospitality is projected to grow by 12.9%, adding 27,400 jobs. Construction is projected to add 19,000 with 13,700 of the jobs in the specialty trades subsector.⁸

The top five fastest-growing industry sectors are construction (19.5%), health care and social assistance (18.9%), leisure and hospitality (12.9%), information (11%), and professional and business services (9.5%).⁹

The industry sectors that added the most jobs between 2017 and 2020 are represented in the chart below.

NAICS	Description	2017 Jobs	2020 Jobs	2017 - 2020 Change
62	Health Care and Social Assistance	196,290	209,045	12,755
56	Administrative and Support and Waste Management and Remediation Services	153,583	162,612	9,029
54	Professional, Scientific, and Technical Services	151,234	156,909	5,674
55	Management of Companies and Enterprises	33,320	37,935	4,616
23	Construction	121,891	125,428	3,537

Source: EMSI Labor Market Analytics, 2021

Orange County is a thriving hub for medical device companies and cutting-edge industry sectors, including life sciences, information technology, digital arts and media, and advanced manufacturing. It is also known for its growing ecosystem of entrepreneurship and innovation. Many Southern California startups work on virtual and augmented reality, cybersecurity, biomedical science, bioengineering, medical imaging, medical device, and environmental health technologies. Over the next several years, Orange County is poised to be at the center of emergent industries based on educational and intellectual assets in the region. The county's most robust traded clusters with a high employment specialization in the area are medical device manufacturing (US Ranking 1), lighting and electrical equipment manufacturing (US Ranking 2), apparel manufacturing (US Ranking 3), information technology and analytical instruments manufacturing (US Ranking 5), and financial services (US Ranking 6).¹⁰

2Ai. Provide an analysis of current employment and unemployment data.

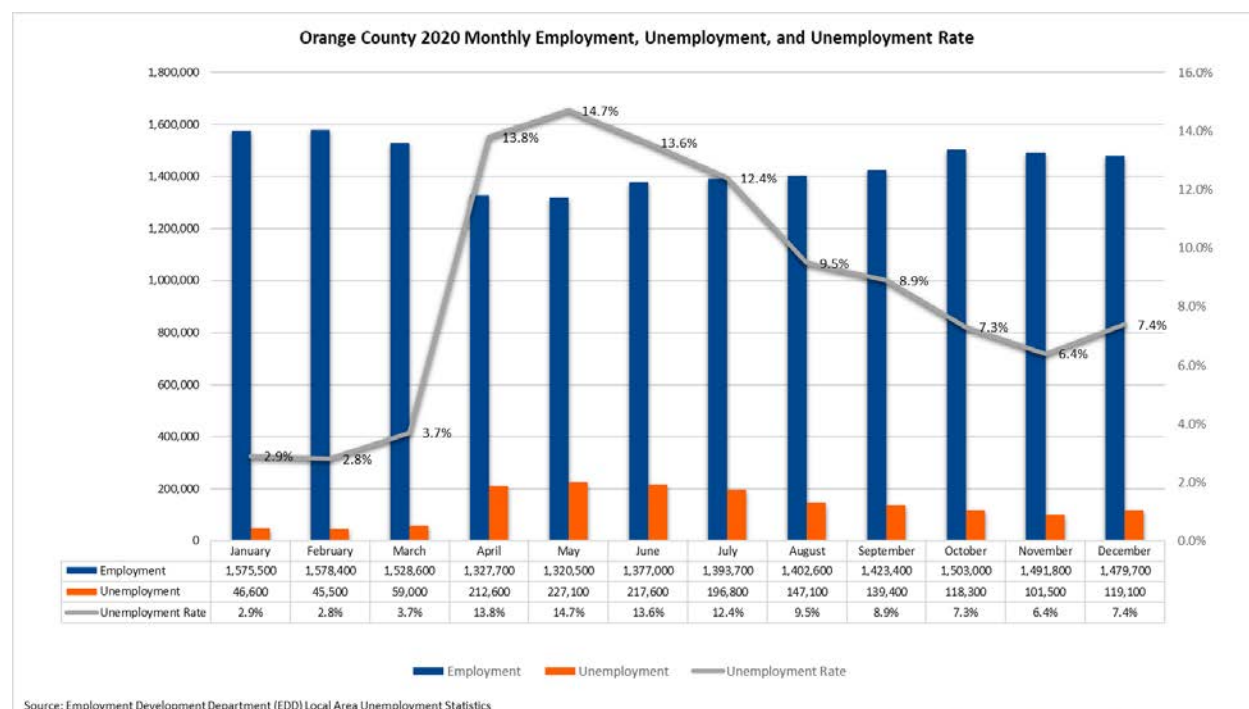
Orange County had a positive economic outlook before the impacts of the COVID-19 pandemic. In January of 2020, Orange County had an unemployment rate of 2.9%, the lowest in Southern California. In the preceding 12 months, the county's unemployment rate had not exceeded 3.1%. Before California's first statewide stay-at-home order issued in March, closing all nonessential businesses and restaurant dining, the unemployment rate stood at 2.8% in February of 2020. The economic disruption from COVID-19 resulted in steep job losses, with the unemployment rate quadrupling at its peak of 14.7% in May 2020, the highest unemployment rate ever recorded for

⁸ Labor Market Information, EDD, 2021, www.labormarketinfo.edd.ca.gov

⁹ Labor Market Information, EDD, 2021, www.labormarketinfo.edd.ca.gov

¹⁰ "U.S. Cluster Mapping: Mapping a Nation of Regional Clusters." U.S. Cluster Mapping | Mapping a Nation of Regional Clusters, www.clustermapping.us/.

Orange County. The rates slowly declined to 6.4% in November 2020 before ascending to 7.4% in December 2020 when regional stay-at-home orders went back into effect. This rate compares with an unadjusted unemployment rate of 8.8 percent for California and 6.5 percent for the nation during the same period.¹¹

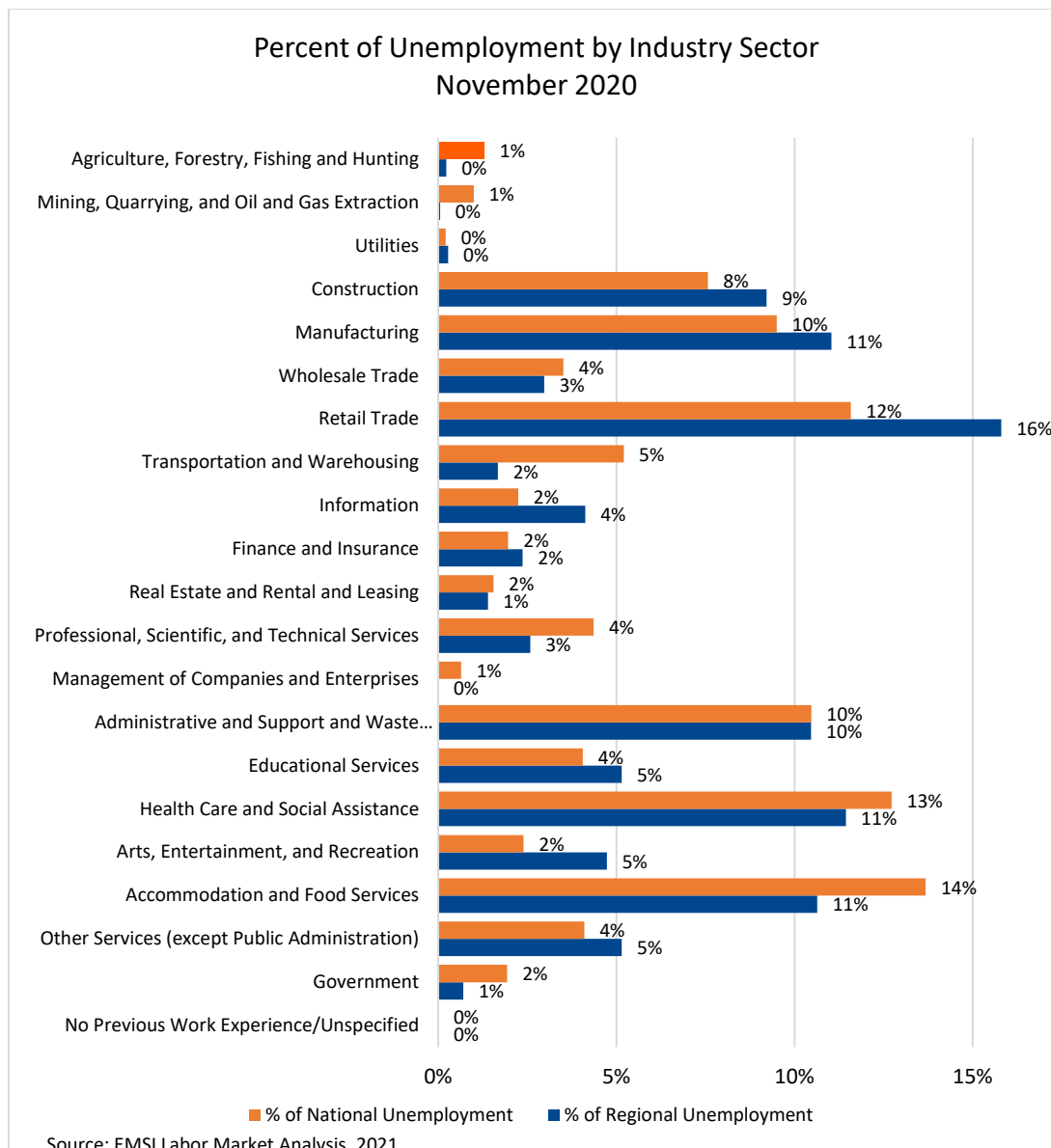


Concentrated job loss in hospitality and tourism stung more sharply in the Orange County region due to its economic dependence on tourism. In 2019, a record 50.2 million travelers visited Orange County, spending \$13.0 billion¹², however with the continued closure of major tourism sites, especially Disneyland Park, the leisure and hospitality industry and surrounding cities remain heavily impacted. The percent of unemployment by industry sector shows a grim picture for industries that rely heavily on tourism. As of November 2020, retail trade had the highest unemployment numbers at 16,063, and accommodation and food services had 10,815 unemployed. Other industries with high numbers of unemployment include Health Care and Social Assistance (11,628), Manufacturing (11,215), Construction (9,371).¹³

¹¹ Labor Market Information, EDD, 2021, www.labormarketinfo.edd.ca.gov/data/lmi-by-subjects.html.

¹² Orange County Visitors Association, 2019, *Orange County Visitors Association 2019-2021 Destination Marketing Plan*, www.travelcostamesa.com/visittheoc/wp-content/uploads/2019/08/Marketing.pdf.

¹³ EMSI Labor Market Analytics, 2021, www.economicmodeling.com.



The pandemic-induced recession caused a loss of 267,600 nonfarm jobs between February and April in Orange County. The employment loss between March and April of 2020 alone was 225,800, the largest ever recorded in a single month. All industry sectors experienced declines between February and April, but leisure and hospitality (down 102,800) accounted for 38 percent of the total nonfarm job loss during this period¹⁴. Most of the decline was between March and April, with a loss of 90,300 jobs. Seventy-seven percent of the drop occurred in accommodation and food services (down 70,300 jobs), led by decreases in food services and drinking places (down 59,800 jobs). Other significant drops during this period include arts, entertainment, and recreation, which fell by 20,000 jobs. Trade, transportation and utilities decreased by 31,400 jobs, with retail trade accounting for 66 percent of the decline (down 20,800 jobs). Wholesale trade dropped by 8,800 jobs, and transportation, warehousing and utilities decreased by 1,800

¹⁴ Labor Market Information, EDD, 2021, www.labormarketinfo.edd.ca.gov/data/lmi-by-subjects.html.

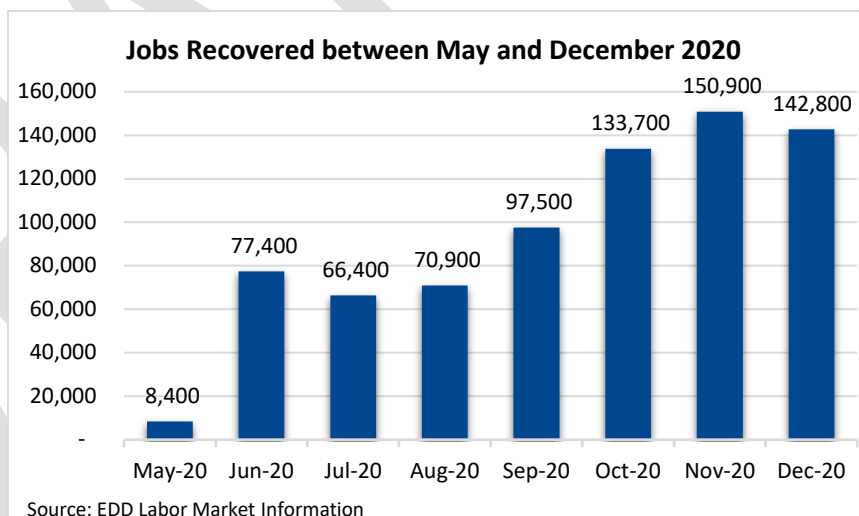
jobs. Professional and business services declined by 29,200 jobs. Administrative and support services, which includes temporary help firms, dropped by 18,900 jobs.¹⁵

Pandemic Job-Related Losses ¹⁶

Industry	Feb-20	Mar-20	Apr-20	Dec-20	Feb to Apr	% change	April to December	% of losses recovered	Shortfall as of December
Total Nonfarm	1,677,800	1,636,000	1,410,200	1,553,000	-267,600	15.9%	142,800	53.4%	124,800
Construction	105,400	100,600	96,800	107,900	-8,600	8%	11,100	129%	-2,500
Manufacturing	158,700	157,500	143,200	145,300	-15,500	9.8%	2,100	13.5%	13,400
Transportation & Warehousing	26,700	26,300	24,300	29,600	-2,400	9.0%	5,300	220.8%	-2,900
Professional & Business Services	326,300	313,300	288,400	318,400	-37,900	12%	30,000	79%	7,900
Educational Services	34,500	34,400	31,100	27,600	-3,400	9.9%	-3,500	-102.9%	6,900
Health Care & Social Assistance	200,600	198,800	172,600	196,400	-28,000	14.0%	23,800	85.0%	4,200
Leisure & Hospitality	227,500	215,000	124,700	168,700	-102,800	45.2%	44,000	42.8%	58,800
Other Services	50,800	44,400	33,000	41,100	-17,800	35.0%	8,100	45.5%	9,700
Government	168,700	170,500	162,000	156,100	-6,700	4.0%	-5,900	-88.1%	12,600

As California moves toward reopening, regional differences will contribute to the pace of recovery. The current depth of job losses and Orange County's reliance on service sectors means the region will have more ground to make up. How quickly businesses reopen and rehire will depend on their viability and how public health risks evolve within the area. For sectors and companies that rely on in-person interaction,

the recovery pace is likely to be slower. As of December 2020, the county recovered 142,800 nonfarm jobs, which is equivalent to 53% of the job losses since the pandemic recession. Most industries are experiencing incremental job gains monthly. Transportation and utilities and construction jobs have exceeded pre-pandemic levels, with the largest month-over increase, up 4,200 jobs. Wholesale trade gained 1,800 jobs, retail trade added 1,500 jobs, and transportation, warehousing and utilities expanded by 900 jobs.¹⁷

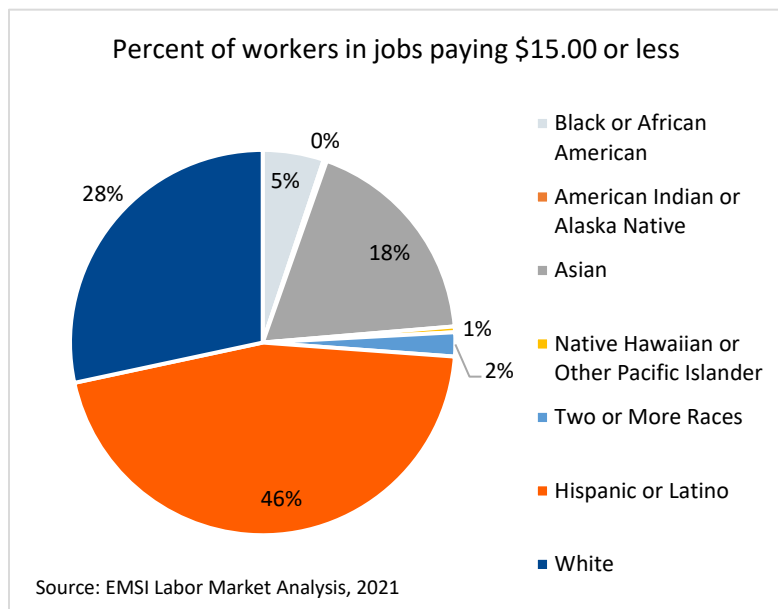


¹⁵ Labor Market Information, EDD, 2021, <https://www.labormarketinfo.edd.ca.gov/geography/orange-county.html>

¹⁶ EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

¹⁷ Labor Market Information, EDD, 2021, www.labormarketinfo.edd.ca.gov/data/lmi-by-subjects.html.

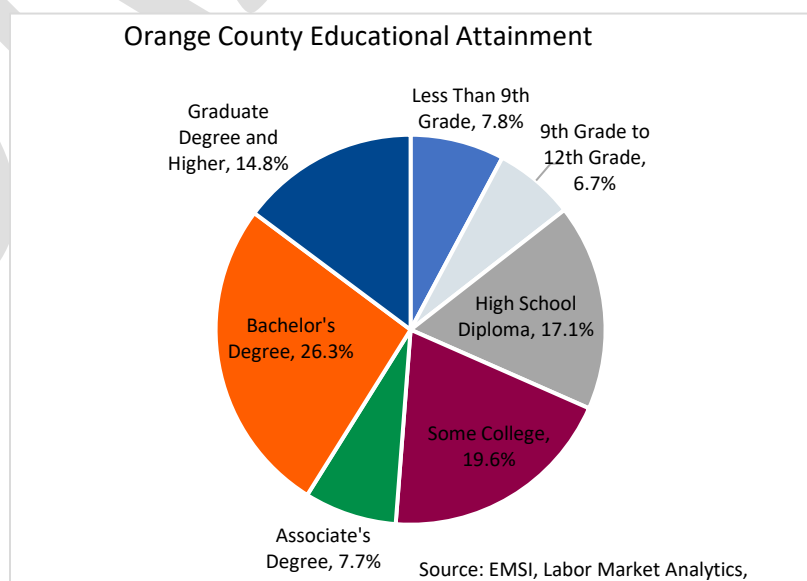
According to Opportunity Insight's Economic Tracker, the drastic difference between the low and high quartiles shows that lower-income bracket workers are disproportionately affected by the pandemic. In Orange County, as of November 15, 2020, employment rates among workers in the bottom wage quartile (<\$27K) decreased by 25.4%, middle quartile (\$27K-\$60K) decreased by 1.4%, and high quartile (>\$60K) increased 6.8% compared to January 2020¹⁸. Minority residents mostly held these lower-paying jobs and went into this economic crisis much more financially insecure and unstable.



2Aii. Provide an analysis of the current educational and skill levels of the workforce, the current needs of employers in the region, and any relevant skill gaps between the two.

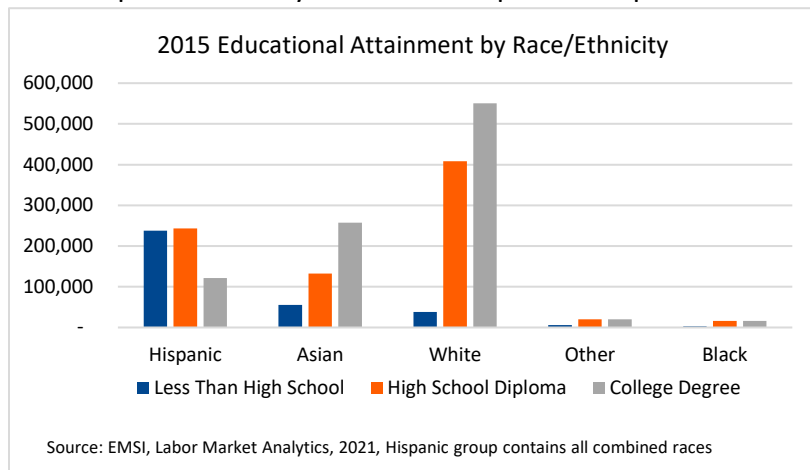
Orange County is home to major universities such as the University of California, Irvine (UCI), California State University, Fullerton (CSUF), and Chapman University. It has four community college districts with nine community colleges. These community colleges educate approximately 310,000 students in credit and noncredit courses each year.

Orange County's primary competitive advantage is a talent pool of highly educated, qualified residents. In Orange County, 48.8% of adults over the age of 25 have an associate degree or higher, while only 14.5% lack a high school diploma. Orange County residents who possess a bachelor's degree are 6.3% above the national average, and 7.7% hold an associate degree, which is 0.9% below the national average.



¹⁸ "The Economic Tracker." Economic Tracker, tracktherecovery.org/.

Education data covers the population aged 25 years or older, indicating the highest level of education achieved. Inequitable access to postsecondary education is a persistent problem. One way in which this manifests is through widely varying educational attainment across race and ethnicity. California's Post-secondary to Prosperity Dashboard shows only 16% of Latinx residents hold a four-year degree. The dashboard also shows that most Latinx residents have no college experience (59%), greater than all other groups.¹⁹





The most popular majors in Orange County are Liberal Arts and Sciences (21,289 and 25%), Business Administration and Management (8,251 and 10%), and General Psychology (8,251 and 3%).

Orange County Regional Institutions Program Completions²⁰

CIP Code	Program	Completions (2015)	Completions (2016)	Completions (2017)	Completions (2018)	Completions (2019)
24.0101	Liberal Arts and Sciences/Liberal Studies	9,762	10,444	11,289	11,990	21,289
52.0201	Business Administration and Management, General	7,093	7,993	7,914	7,758	8,251
42.0101	Psychology, General	2,145	2,208	2,138	2,462	2,637
30.0101	Biological and Physical Sciences	1,045	1,210	1,134	1,440	1,918
51.3801	Registered Nursing/Registered Nurse	1,366	1,523	1,731	1,655	1,844
9.0101	Speech Communication and Rhetoric	1,325	1,401	1,541	1,524	1,601
45.1101	Sociology	1,041	1,025	1,141	1,286	1,281
11.0701	Computer Science	592	840	929	1,132	1,274
26.0101	Biology/Biological Sciences, General	1,101	1,056	1,015	1,083	1,200
12.041	Nail Technician/Specialist and Manicurist	865	1,195	1,230	870	1,163

Employer need in the Orange County region is based on job posting and employment data analysis, and educational programs' completions. Per the two-digit Standard Occupational Classification (SOC) code group, there are twenty-four occupations


610 Programs
 1,639 programs can train for this job, while only 610 programs have produced completers in this region.


86,656 Completions (2019)
 The completions from all regional institutions for all degree types.


196,852 Openings (2019)
 The average number of openings for an occupation in the region is 261.

¹⁹ "P2P Regions." *California Competes*, californiacompetes.org/p2p/regions?region=orange.

²⁰ *EMSI Labor Market Analytics*, 2021, www.economicmodeling.com.

and 610 programs in the region of study that may train for these occupations. Of these programs, there were 86,656 program participant completions in 2019 and 196,852 job openings that needed to be filled.

Identified in the table below are the occupations with the highest projected skills gap for Orange County between 2015 and 2025. This analysis indicates a continued need to identify strategies to fulfill training needs in various high-gap occupational areas. The research includes data based on the following:

- Occupations where the 2020 median income hourly wage is higher than \$16.00 an hour
- Openings greater than 10 (openings represent replacement jobs and Bureau of Labor Statistics(BLS) growth estimates)
- Entry-level education that was greater than a postsecondary nondegree award and equal to or less than a bachelor's degree
- Top 15 occupations with a skills gap greater than zero (skills gap is the difference between the projected openings and completions)
- The Openings figure estimates the change in growth and replacement jobs (Growth + Replacements = Openings). Growth captures the change in the total number of workers employed in an occupation. At the same time, replacement jobs are estimates of workers permanently leaving a career and needing to be replaced by new hires. A combination of both numbers indicates total openings.

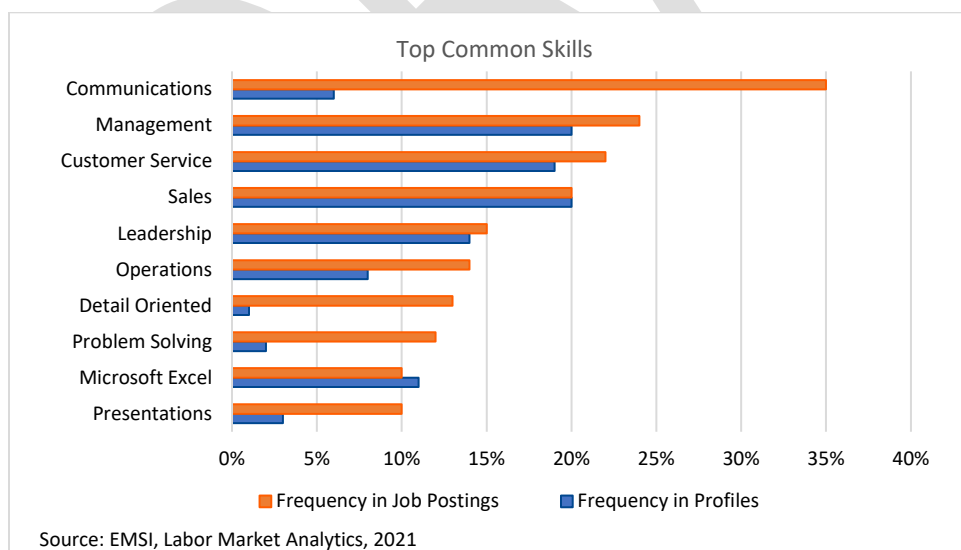
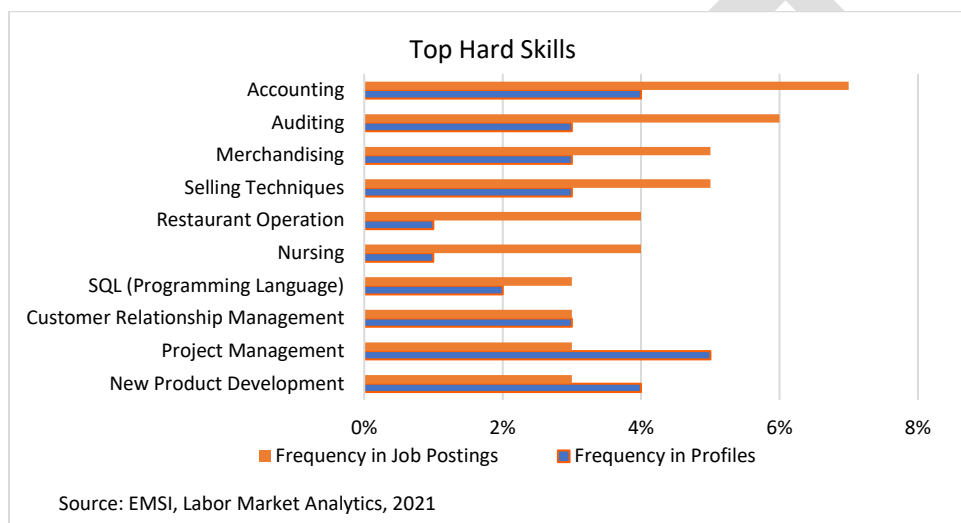
Skills Gap by Occupation²¹

SOC	Description	2020 Jobs	2025 Jobs	2020 - 2025 Change	2020 - 2025 Replacement Jobs	2020 - 2025 Openings	Regional Completions (2019)	Skills Gap	Median Hourly Earnings	Typical Entry Level Education
43-3031	Bookkeeping, Accounting, and Auditing Clerks	20,984	20,603	(381)	11,058	13,243	676	12,567	\$22.58	Some college, no degree
25-9045	Teaching Assistants, Except Postsecondary	11,752	12,207	455	5,678	7,391	45	7,346	\$17.63	Some college, no degree
53-3032	Heavy and Tractor-Trailer Truck Drivers	10,600	10,908	308	5,433	6,891	133	6,758	\$22.92	Postsecondary nondegree
31-1131	Nursing Assistants	9,546	10,594	1,049	5,118	7,441	1,178	6,263	\$16.75	Postsecondary nondegree
31-9092	Medical Assistants	8,628	9,548	920	4,476	6,496	2,156	4,340	\$17.62	Postsecondary nondegree award
31-9011	Massage Therapists	4,714	5,489	775	2,556	4,013	1,097	2,916	\$16.96	Postsecondary nondegree
23-2011	Paralegals and Legal Assistants	4,308	4,662	354	2,143	3,009	174	2,835	\$22.87	Associate degree
49-3023	Automotive Service Technicians and Mechanics	6,645	6,526	(119)	2,867	3,435	608	2,827	\$21.99	Postsecondary nondegree
31-9091	Dental Assistants	5,617	5,799	182	2,846	3,648	1,295	2,353	\$19.39	Postsecondary nondegree
43-4151	Order Clerks	3,576	3,337	(240)	1,826	2,211	41	2,170	\$17.34	Some college, no degree
49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	3,944	4,182	238	1,727	2,354	262	2,092	\$29.66	Postsecondary nondegree
15-1232	Computer User Support Specialists	7,826	8,244	418	2,690	3,724	1,647	2,077	\$26.56	Some college, no degree
29-2061	Licensed Practical and Licensed Vocational Nurses	6,214	6,894	680	2,254	3,520	1,506	2,014	\$28.94	Postsecondary nondegree

²¹ EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

SOC	Description	2020 Jobs	2025 Jobs	2020 - 2025 Change	2020 - 2025 Replacement Jobs	2020 - 2025 Openings	Regional Completions (2019)	Skills Gap	Median Hourly Earnings	Typical Entry Level Education
49-2022	Telecommunications Equipment Installers and Repairers, Except Line Installers	2,327	2,099	(228)	1,119	1,331	0	1,331	\$29.93	Postsecondary nondegree
17-3023	Electrical and Electronic Engineering Technologists and Technicians	2,202	2,217	15	919	1,122	1	1,121	\$30.84	Associate degree

The top three hard skills requested by employers in job postings between January 2020 to January 2021 were accounting, auditing, and customer relationship management. The following charts show the top common hard skills and the top common skills in relation to the frequency these skills appeared in job seeker profiles.



2Aiii. Provide an analysis of industries and occupations with an emerging demand.

The RPU analyzed location quotient, total jobs, and competitive effect data to identify industries and occupations with an emerging demand. An analysis of location quotient data demonstrated which occupations and industries are unique and specialized in the Orange County region (compared to the national average). The competitive effect indicates how much of the job change results from some unique competitive advantage in the area. The competitive effect measures the job change that cannot be explained by national growth and industry mix. The change in competitive effect points to regional-specific factors on the change in local employment numbers. Factors such as labor force training and education, skills, transportation, supply chains, aging demographics, and other regionally influenced factors may impact these industries and occupations' competitiveness.

Using the 3-digit NAICS code, the emerging industries identified had a location quotient that increased between 2015 and 2020 and had a location quotient less than 1.2. The industry list was filtered to include industries with a competitive effect greater than 1, percent change in jobs higher than 10%, and more than 1,000 jobs.

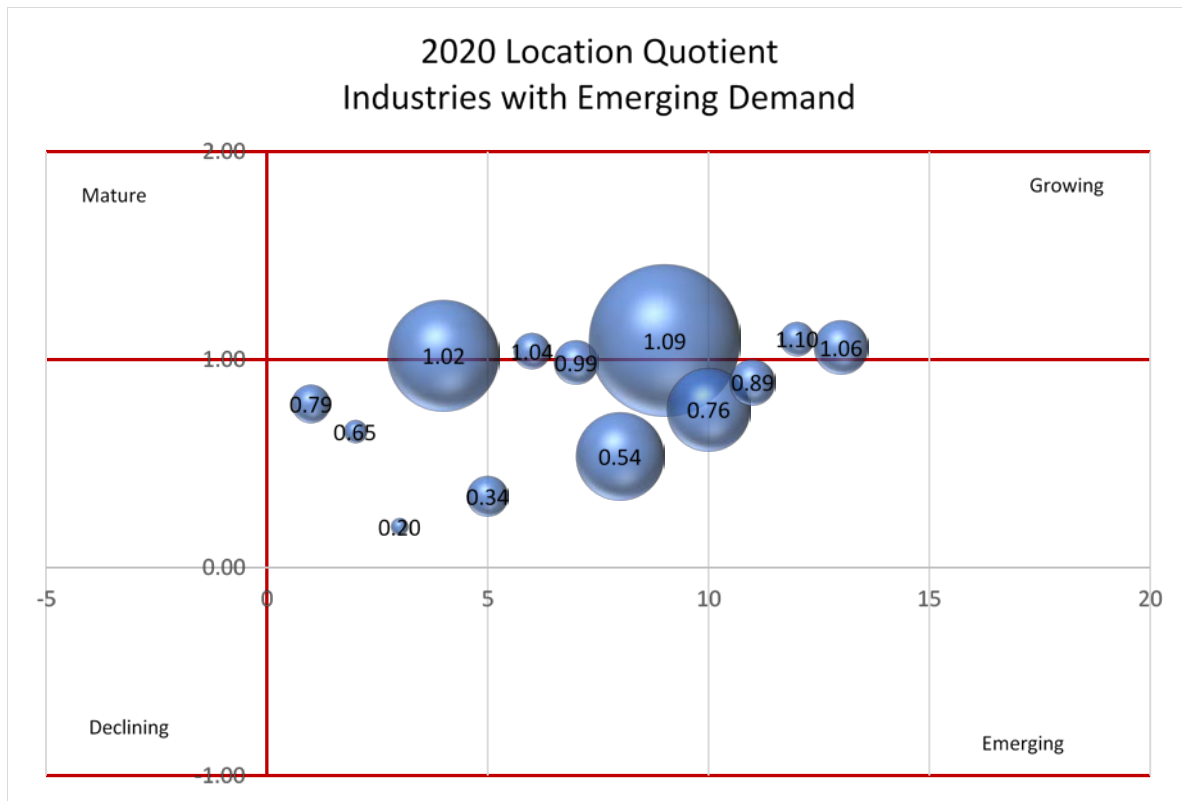
The following chart consists of a list of the top thirteen emerging industries in Orange County. This combined list of sectors accounted for 273,362 jobs in 2020. This group of industries is projected to grow to 327,315 jobs by 2030.

Mature	Growing
Location Quotients are greater than 1.2 and steadily decreasing	Location Quotients are greater than 1.2 and steadily increasing
Declining	Emerging
Location Quotient is less than 1.2 and steadily decreasing	Location Quotient is less than 1.2 and steadily increasing

Industries with Emerging Demand

NAICS	Description	2015 Jobs	2020 Jobs	2015 - 2020 Change	2015 - 2020 % Change	Competitive Effect	2015 Location Quotient	2020 Location Quotient	% Change in LQ
485	Transit and Ground Passenger Transportation	4,245	6,136	1,891	45%	1,209	0.64	0.79	14.56%
312	Beverage and Tobacco Product Manufacturing	1,551	2,080	529	34%	125	0.62	0.65	3.04%
481	Air Transportation	827	1,091	264	32%	197	0.16	0.20	3.29%
624	Social Assistance	41,749	50,822	9,072	22%	3,690	0.96	1.02	6.02%
484	Truck Transportation	5,604	6,621	1,017	18%	841	0.30	0.34	3.92%
562	Waste Management and Remediation Services	4,665	5,385	720	15%	158	1.02	1.04	1.58%
454	Nonstore Retailers	6,937	7,948	1,011	15%	273	0.97	0.99	2.00%
902	State Government	28,208	32,308	4,100	15%	3,552	0.48	0.54	5.19%
621	Ambulatory Health Care Services	84,699	96,614	11,915	14%	3,346	1.07	1.09	2.24%
623	Nursing and Residential Care Facilities	25,146	28,413	3,267	13%	2,887	0.69	0.76	6.72%
325	Chemical Manufacturing	7,473	8,441	968	13%	595	0.84	0.89	5.07%
337	Furniture and Related Product Manufacturing	4,263	4,802	540	13%	646	0.97	1.10	13.38%
446	Health and Personal Care Stores	10,942	12,253	1,312	12%	1,524	0.94	1.06	11.82%

Source: EMSI, Labor Market Analytics, 2021



The following is a list of the top occupations in Orange County with emerging demand. These occupations have a location quotient of less than 1.2 as of 2020. The location quotient has increased since 2015. The competitive effect is positive in these professions, demonstrating a high degree of regional-specific factors influencing job growth.

SOC	Description	2015 Jobs	2020 Jobs	2015 - 2020 Change	2015 - 2020 % Change	Median Hourly Earnings	Competitive Effect	2015 Location Quotient	2020 Location Quotient	% Change in LQ
31-1100	Home Health and Personal Care Aides; and Nursing Assistants, Orderlies, and Psychiatric Aides	30,483	54,644	24,161	79%	\$13.52	20,036	0.59	0.91	0.33
19-5000	Occupational Health and Safety Specialists and Technicians	574	877	303	53%	\$40.62	142	0.59	0.70	0.10
21-1000	Counselors, Social Workers, and Other Community and Social Service Specialists	17,852	24,920	7,068	40%	\$23.94	5,082	0.77	0.96	0.18
33-1000	Supervisors of Protective Service Workers	1,127	1,383	256	23%	\$33.60	64	0.37	0.38	0.01
25-9000	Other Educational Instruction and Library Occupations	16,127	19,323	3,196	20%	\$18.30	1,792	0.85	0.93	0.07
53-3000	Motor Vehicle Operators	29,104	34,733	5,629	19%	\$19.04	3,050	0.61	0.66	0.05
53-2000	Air Transportation Workers	1,013	1,205	192	19%	\$45.77	115	0.28	0.31	0.03
11-9000	Other Management Occupations	39,256	46,246	6,991	18%	\$43.06	2,157	0.98	1.01	0.03
45-1000	Supervisors of Farming, Fishing, and Forestry Workers	94	111	17	17%	\$29.59	19	0.15	0.18	0.03
47-4000	Other Construction and Related Workers	3,271	3,835	564	17%	\$28.06	292	0.70	0.74	0.05

SOC	Description	2015 Jobs	2020 Jobs	2015 - 2020 Change	2015 - 2020 % Change	Median Hourly Earnings	Competitive Effect	2015 Location Quotient	2020 Location Quotient	% Change in LQ
51-8000	Plant and System Operators	1,618	1,842	224	14%	\$39.74	263	0.45	0.52	0.07
45-3000	Fishing and Hunting Workers	81	91	10	12%	\$19.64	24	0.19	0.26	0.07
53-7000	Material Moving Workers	76,369	85,529	9,160	12%	\$14.41	2,204	1.06	1.07	0.01
39-1000	Supervisors of Personal Care and Service Workers	2,551	2,841	290	11%	\$17.43	99	0.96	0.98	0.02
29-1000	Healthcare Diagnosing or Treating Practitioners	47,605	52,687	5,082	11%	\$51.85	906	0.79	0.79	0.00
39-9000	Other Personal Care and Service Workers	21,724	23,853	2,130	10%	\$14.05	2,621	0.81	0.90	0.09
25-1000	Postsecondary Teachers	17,453	19,004	1,551	9%	\$42.07	1,599	0.87	0.93	0.07
49-9000	Other Installation, Maintenance, and Repair Occupations	28,031	30,368	2,337	8%	\$22.97	643	0.83	0.83	0.01
33-2000	Firefighting and Prevention Workers	1,783	1,918	136	8%	\$40.45	110	0.48	0.50	0.02
21-2000	Religious Workers	4,340	4,639	299	7%	\$29.84	166	0.84	0.85	0.02
51-3000	Food Processing Workers	6,764	7,042	278	4%	\$14.06	198	0.76	0.77	0.01
45-4000	Forest, Conservation, and Logging Workers	116	120	4	4%	\$14.14	4	0.14	0.15	0.00
37-2000	Building Cleaning and Pest Control Workers	48,275	49,995	1,720	4%	\$14.85	3,534	1.01	1.07	0.06

Source: EMSI, Labor Market Analytics, 2021

2B. FOSTERING DEMAND-DRIVEN SKILLS ATTAINMENT

2Bi. Identify the in-demand industry sectors or occupations for the region.

The Orange RPU has identified four priority industry sectors (or industry clusters) with a substantial current and potential impact on the regional economy based on labor market information. Advanced manufacturing, health care, information communication technology and digital media, and retail, hospitality and tourism contribute to the growth and stability of other supporting businesses, industry sectors, and jobs that lead to economic self-sufficiency and advancement opportunities for Orange County residents.

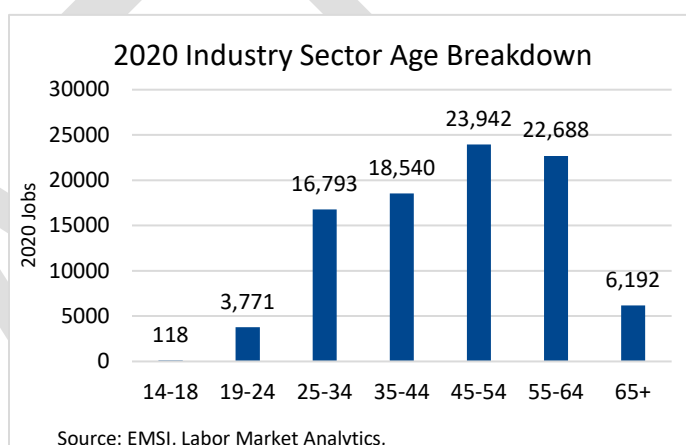
NAICS industry codes included in each sector

Industry	NAICS
Advanced Manufacturing	3240, 3251-54, 3259, 3271, 3279, 3311, 3313, 3315, 3331-3333, 3336, 3339, 3341-3346, 3351-3353
Healthcare	621,622,623
Information and Communications Technology (ICT)/Digital Media	51, 5415
Retail, Hospitality, & Tourism	44, 45, 71,72

The Advanced Manufacturing sector has 92,045 full and part-time jobs. The average earnings per job in 2020 was \$122,840. There were 2,169 payrolled businesses in the Orange County region in 2020. The industry growth between 2017 and 2020 was .9%, below the state average of 1.9%. Regardless of this slight upward percentage movement, manufacturing has been on the decline in the region and the nation. The expected change between 2020 to 2030 is -5.2%, with a loss of 4,741 jobs. Automation, change in skills required to perform new tasks, import competition, and a decrease in mobility are all reasons cited as contributions to the decline.

Despite the declining jobs, advanced manufacturing is a priority in the Orange RPU due to the number of jobs and the impact on the local economy, given the sector's total gross regional product (GRP) of \$23.8 billion. This sector represents approximately 10% of the county's total GRP. The advanced manufacturing sector has highly specialized and growing advanced manufacturing subsectors in Orange County. Medical equipment and supplies manufacturing had a concentration in the Orange County region five times higher than typical regional areas, with a location quotient of 5.43. Medical equipment and supplies manufacturing also increased jobs by 12% between 2015 and 2020, bringing the total employment in 2020 to 19,776. Other healthy and growing subsectors in the region are semiconductor and other electronic component manufacturing (LQ 3.28), audio and video equipment manufacturing (LQ 4.89), semiconductor and Other Electronic Component Manufacturing (LQ 3.28), and Manufacturing and Reproducing Magnetic and Optical Media (LQ 3.12), aerospace product and parts manufacturing (LQ 1.95).

Manufacturing companies will need a skilled worker pipeline to fill jobs in these specialized subsectors and retirement positions. The sector has an aging workforce regionally and nationally. Workers 65 and older represent 6.7% of the workers, and 24.6% are between 55 and 64. Recruiting and retaining a high-quality workforce for new technology-driving positions will be necessary for manufacturing innovation. There are multiple opportunities at various entry points for individuals with a high school diploma, a certification program, or a 2-4 year college degree.



The Healthcare sector has 158,224 full and part-time jobs. The average earnings per job in 2020 was \$77,496. There were 11,248 private and public healthcare establishments in the Orange County region in 2020. The industry growth between 2017 and 2020 was 5.4%, above the state's growth percentage of 5.2%. The expected change between 2020 to 2030 is 18.2%, with a gain of 28,832 jobs. The sector contributes \$15.5 billion in GRP, 9% of the county's total GRP. The healthcare sector comprises several related subsectors and supporting industries that include ambulatory health care services, hospitals, and nursing and residential facilities. The healthcare sector is growing and continues to be a stalwart industry throughout the pandemic. Healthcare is one of the few recession-proof industries, with registered nurses being the top posted occupation between January 2020 to 2021²². The sector will likely continue to be a driver of economic activity given the rapidly aging Orange County population, increasing the likelihood that many residents will require more health care and support services.

²² EMSI Labor Market Analytics, 2021, www.economicmodeling.com.

The ICT/Digital Media (ICT) sector has 54,096 full- and part-time jobs. Computer programming services, computer systems design services, and software publishers have the highest number of jobs in the county, at 33,410 jobs combined. The average earnings per job in 2020 was \$132,987. There were 4,545 payrolled business locations in the Orange County region in 2020. The industry growth between 2017 and 2020 was 0.8%, below the nation's percentage of 3.5%. The expected job growth between 2020 to 2030 is 7.1%, with a gain of 3,849 jobs. The sector contributes \$16.1 billion in GRP, 11% of the county's total GRP. The technology sector accounts for a significant portion of Orange County's economic activity, as economies, jobs, and personal lives become more digital and automated. The ICT sector develops innovative services and products that impact all industries in a region. The ICT applications can be seen in manufacturing with computer simulation and the healthcare industry with the rise of telemedicine and telehealth. Training and upskilling of existing staff in the industry will be crucial in ensuring regional competitiveness.

The Retail, Hospitality, and Tourism sector has 369,332 full- and part-time jobs, making it the largest targeted sector of the RPU. The average earnings per job were \$39,625 in 2020. There were 19,500 payrolled establishments in the Orange County region in 2020. The number of jobs declined by 5.9% between 2017 and 2020. The state and the nation declined by 5.7% during the same period. The expected change between 2020 to 2030 is a growth of 3.0% and 11,153 job gains. The sector contributes \$26.2 billion in GRP, 10% of the county's total GRP. According to the Orange County Visitors Association, OC welcomed 50.2 million visitors who spend 413 billion dollars in 2019. This sector is part of Orange County's DNA and was hit the hardest by the pandemic's effects. The industry sector is diverse and includes hotels, restaurants, entertainment venues, cultural attractions, sports parks, theme parks, food establishments, retail stores, and other venues. The industries with the highest numbers of jobs in 2020 were full-service restaurants (60,461), limited-service restaurants (52,828), and amusement and theme parks (27,368).

Often the jobs within these industries are characterized by low-wages. The industry has historically offered entry-level employment opportunities to new immigrants and candidates with a high school diploma. While many jobs exist in lower-paid, entry-level classifications, there are many opportunities to secure positions offering higher compensation. The challenge is ensuring those in entry-level positions obtain additional job-specific skills and English language skills necessary to qualify for promotional opportunities. Sector strategies and incumbent worker training are workforce development strategies that can play an essential role in lifting people up from lower-wage jobs.

2Bii. Describe how the RPU and regional partners will expand or develop, and then implement sector initiatives for those in-demand industry sectors or occupations.

Orange RPU started the regions sector partnership work under the Slingshot grant. The RPU engaged John Melville, a national leader in the design and practice of next-generation industry engagement. John Melville's initial work guided the launch of Industry Sector Partnerships (ISP) in the RPU's four priority sectors using the Next Gen Sector Partnership model. The first

collaboration meetings occurred just before the COVID-19 pandemic. These meetings represented a starting point for a partnership that will deepen and grow over the next several years. The RPU had participation from core partners, employers, chambers, and unions. The Orange RPU regional organizer will continue to lead the sector partnership work.

The goal of the RPU sector partnership strategy is three-fold:

1. Conduct regular sector meetings with employers to identify common industry priorities, address shared vitality issues, and understand hiring and training needs to create a pipeline of qualified candidates in growing sectors.
2. Develop workforce strategies in partnership with adult education, community colleges, and other partners that include mapping career pathways, work-based learning, and apprenticeship programs.
3. Unify and coordinate business engagement efforts by all partners to minimize duplication of efforts, minimize employer fatigue, and promote systemic change that benefits the industry, workers, and the community.

To address upward income mobility and improve economic self-sufficiency, continuous and authentic industry leadership and shifts in workforce strategies are needed to transition low-skill job seekers into middle-skill careers and address underemployment in the region. The pandemic has slowed the industry sector's work progress. The RPU is still committed to re-engaging employers and partners and building upon the industry sector work started.

The RPU will work jointly with the Los Angeles/Orange County Regional Consortium (LAOCRC) as the lead sector strategy convening team. LAOCRC serves as a regional framework to communicate, coordinate, collaborate, promote and plan career and technical education and workforce and economic development in the Los Angeles/Orange County Region. In Orange County, LAOCRC includes nine community colleges and one stand-alone continuing education (noncredit) center within four community college districts. LAOCRC Regional Consortium has identified separate priority sectors for each subregion. Orange County community college sectors are shown below. Four of the community college sectors align with the Orange RPU priority industry sectors; however, the RPU changed the titles to match those of the community college to ensure no confusion on the region's priority industries.

Priority Sectors for the OC Region

Sectors	Community Colleges	Orange RPU
Advanced Manufacturing	✓	✓
Advanced Transportation & Logistics	✓	
Life Sciences/Biotech	✓	
Business and Entrepreneurship	✓	
Energy, Construction, and Utilities	✓	
Healthcare	✓	✓
ICT/Digital Media	✓	✓
Retail, Hospitality, & Tourism	✓	✓

In partnership with LAOCRC, the RPU will expand sector partnerships by working with Orange County chambers of commerce and other community and educational partners to identify additional core team members who will support strengthening industry sector partnerships. Orange County has many state, county, and local civic organizations, four community college school districts, twenty-seven K-12 school districts, California State University and University of California systems, and numerous other public and private stakeholders with a vested interest in workforce and economic development. Such a large number of stakeholders requires a great deal of commitment from the core group to build deep, sustainable relationships resulting in career pathways and a steady pipeline of workers within our identified priority sectors.

This core team will be responsible for developing and carrying out an action plan that provides a strategic and coordinated effort to unify business engagement efforts, identify and engage industry champions, other businesses, and support partner organizations. The core team will relaunch sector meetings in the four sectors to gather information about the challenges and opportunities. After the initial meetings, employers will be invited to regular meetings to set goals to address their needs and take actions with the partners on those goals. Meetings and agendas will be employer-driven, and actions taken will create a pipeline of qualified candidates who meet industry needs for in-demand occupations.

Although the RPU has started using the Next Gen model, fidelity is not as important as determining the appropriate strategies tailored to the Orange County regional economy, industry sectors, and worker populations. The RPU will schedule industry sector group meetings, and the groups will begin to identify strategies, design appropriate programs and services, and then move into the implementation of sector projects. Implementation will likely include a mix of basic strategies that include:

- Training and skills development to bring new employees into specific industries and occupations
- Business development
- Incumbent worker training
- Labor market and industry research
- Restructuring of work environments to improve recruitment, hiring, training, compensation, and retention strategies
- Integrating two or more of these strategies in a multifaceted approach

2C. ENABLING UPWARD MOBILITY FOR ALL CALIFORNIANS

2Ci. Describe how the RPU will prioritize working with employers who provide quality jobs that provide economic security through family-sustaining wages and comprehensive benefits. This should include whether the RPU has, or plans to develop, a formal policy related to job quality.

The Orange RPU is committed to identifying strategies that improve the workforce system, ensuring that it enables economic growth and shared prosperity for employers and employees. The California Workforce Development Board defines quality jobs as employment that provide

family-sustaining wages, health benefits, a pension, worker advancement opportunities, and collective worker input and are stable, predictable, safe, and free of discrimination. The local boards are attuned to the pandemic's increased impact on residents in lower-paying jobs and the increasing national attention given to those in low-wage jobs and who face increased inequality. The RPU and regional partners work tirelessly to move unemployed and underemployed individuals, especially those with barriers to employment, into higher-paying jobs with benefits.

Before the pandemic, Orange County's unemployment numbers were historically low. But unfortunately, low unemployment did not mean all Orange County residents were thriving. Based on the two hundred and sixty-sixth percentile (266%) of the 2020 Federal Poverty Levels, the self-sufficiency standard in Orange County is \$23.89 an hour for a family size of 2. Low-wage workers have suffered the most in this pandemic-induced recession. In 2020, 741,966 of the 1,805,612 jobs (42%) had an average wage of less than \$20.00 an hour. The majority of these jobs (511,322) were held by minority workers, with Hispanics holding the largest share of these lower-wage jobs (46%). Massive job losses have been concentrated among lower-wage workers in retail, hospitality and tourism, and food service jobs.

The region's targeted industry sectors show potential for family-sustaining wages but are not immune to offering lower wages. Such jobs are a big part of the Orange County regional economy, given its large footprint in the retail, hospitality, and tourism industry. While some of these entry-level occupations in targeted industry sectors have well-articulated career pathways to a job with self-sustaining wages, each of the professions provides foundational skills that will better qualify individuals for enhanced employment and income opportunities. Aspen Institute's work on sectoral workforce development strategies identified two fundamental approaches to helping people connect to better employment:

- 1) removing barriers to good jobs for low-income people and
- 2) improving the quality of jobs in key sectors in which many low-income people work²³.

The RPU and regional partners understand the importance of developing strategies that accomplish both. Through industry sector work, the RPU is committed to ensuring that job training is a bridge to more financial stability and not a funnel for low-skill individuals into low-wage occupations.

The Orange RPU understands its role in investing in and advocating for quality jobs. The RPU will develop a standard tool for determining job quality to assess what industries, companies, and jobs to target. The RPU will prioritize working with employers who provide quality jobs and those interested in improving their job quality and being part of moving low-wage workers into better-paying positions. The RPU will develop business engagement protocols that focus on engaging businesses that provide quality jobs or have an interest in improving job quality. The RPU will work with industry sector business leaders to ask questions and begin conversations around job

²³ Maureen Conway et al., *Sectoral Strategies for Low-Income Workers: Lessons from the Field* (Washington, DC: Aspen Institute, October 1, 2007), <https://www.aspeninstitute.org/publications/sectoral-strategies-low-income-workers-lessons-field/>

quality, helping businesses understand how workforce investments can improve their competitive advantage.

Through sector work, the RPU will work with the businesses and regional partners to identify entry-level positions and develop career pathways with multiple entry and exit points, ensuring individuals understand their path to self-sufficiency. The RPU will review high-road employment practices and strategies, such as the National Fund's Design Framework, to design better jobs. Their approach meets employers where they are and supports them along a continuum of improvement. Lastly, the RPU will target limited dollars for on-the-job training and incumbent worker training towards quality jobs that provide upward mobility.

2Cii. Describe how the RPU and regional partners will work together to identify shared target populations and develop targeted service strategies

The one-stop delivery system provides the local boards and partners the framework to continue and advance discussions of how workforce programs can be more effective, efficient, and aligned. The regional partners recognize that the answers will only come when we step out of our respective silos. The RPU and partner organizations have identified and are currently addressing the needs of shared target populations that include English language learners, justice-involved individuals, individuals with disabilities, Veterans, and disconnected and foster youth. A recurring theme in our planning meetings was that organizations seeking to serve these populations feel they would benefit from better linkages with other organizations doing the same work or complementary work.

The RPU has regularly scheduled meetings to address service delivery and performance for all but one of these targeted groups, English language learners. During the regional planning meetings, the local boards and partners shared promising practices to address English language learners' specific challenges. The group discussed two distinct subcategories, those with low skills and education and those with higher skills and educational degrees from other countries. The RPU and partners made commitments to reconvene to discuss how we can collectively improve service delivery to English language learners and determine if other populations warrant different workforce development strategies to serve them more effectively.

2Ciii. Describe how the RPU and regional partners will work with employers and training providers to ensure that historically unserved and underserved communities have equal access to the regional sector pathways, earn and learn opportunities, supportive services, and other approaches identified by the RPU. This should include whether the RPU has, or plans to develop, a formal policy related to equity.

The RPU and regional partners will ensure historically unserved and underserved populations have equal access to regional sector career pathways and other services and support through sector partnerships. Through sector partnership work, the RPU and partners will have the opportunity to work with employers to create career pathways that help mitigate the many challenges unserved and underserved populations face in completing educational goals and

moving into employment with family-sustaining wages. Workforce development programs and supports should not be designed as a one-size-fits-all solution. The populations we serve are diverse, and program designs should reflect this diversity if we are going to close the skills gap and combat economic inequality. Career pathways are a service-delivery model that can close achievement gaps and advance racial equity by helping individuals build skills over time. Career pathways are a long-term approach to serving individuals with limited basic skills or other employment barriers that the local boards are committed to developing.

Sector partnership work will also provide an opportunity for the RPU to address issues such as degree inflation that tend to exclude minorities from jobs during the hiring process. According to Manjari Raman, director of Harvard Business School's project on Managing the Future of Work, degree inflation refers to jobs that historically required more than a high school diploma or less than a college degree but now require a college degree²⁴. Explicitly requiring degrees for positions instead of the jobs' skills exacerbates the effect of racial disparities in educational achievement and eliminates workers who may have acquired the skills in other ways. Also, through sector partnership work, other hiring practices that disproportionately affect minorities, such as automatically excluding potential employees using criminal background checks and credit checks, can be discussed.

Another strategy that the sector partnerships will address is creating work-based learning programs and pre-apprenticeship programs. Pre-apprenticeships can be valuable for people of color who have been historically underrepresented in apprenticeships. Work-based learning programs can provide vital formal access to employers that the population may not have had when relying on their existing professional and social networks.

During the regional planning meetings, two general themes surfaced every session. One was how some people lacked access to OC One-Stop services and the second issue was the lack of digital literacy and access to broadband services. These are issues that the pandemic has exacerbated. Attendees discussed how transportation and childcare needs, and a general lack of understanding of the services available, contribute to preventing a large percentage of those most in need of assistance from accessing them. The local boards recognize specific populations require more outreach and require unique methods and strategies for locating, attracting, and retaining their participation in workforce programs. The Orange County Board recently purchased a mobile unit equipped with 12 computers inside and a monitor outside for presentations. The mobile unit is accessible by wheelchair by using the wheelchair lift. The mobile unit will serve as a mobile One-Stop Center for the Orange County community. During the regional planning meetings, the local boards discussed options for deploying the mobile unit to low-income communities, areas not close to a comprehensive One-Stop Center, and partner locations to increase access and awareness of services. Also, the partners will explore developing and using outreach and communication responsive to the targeted populations. The boards and partner agencies will also explore additional referral agreements and referral processes with

²⁴ Morgan, Kate. "Degree Inflation: How the Four-Year Degree Became Required." BBC Worklife, BBC, 28 Jan. 2021, www.bbc.com/worklife/article/20210126-degree-inflation-how-the-four-year-degree-became-required#:~:text=Corbett%20is%20a%20victim%20of,Managing%20the%20Future%20of%20Work.

other organizations that can be engaged as partners to serve targeted people in their communities. Disadvantaged and vulnerable populations need increased support services, multiple service strategies, co-enrollment in additional programs, referrals to community service providers, and a team approach to succeed in the labor market.

Broadband internet access is necessary for participants to complete enrollment applications, financial aid applications, and work requirements. Job openings are now almost exclusively accessible via the internet. Many job search websites are not fully accessible to mobile phone users. The digital divide between people who have broadband internet access and those who have no access or cell phone-only access is also a huge barrier to accessing post-secondary education and entering the workforce. The RPU and regional partners have discussed the need for partners to collectively address the digital divide and commit to convening a workgroup to address this issue.

The RPU has had informal conversations on strategies to address issues related to equity. The boards are committed to continuing the dialogue on regional equity issues and policy development related to equity.

2D. ALIGNING, COORDINATING, AND INTEGRATING PROGRAMS AND SERVICES

2Di. Describe any regional service strategies, including use of cooperative service delivery agreements or MOU.

A cooperative service agreement has been established between the three local boards to solidify the commitment to the overall workforce and economic development of the OC Region through system alignment, integration of service delivery, and leverage/braiding of funding. The regional boards have a very active and healthy partnership. Regional service strategies include:

- Improve and enhance customer experience by ensuring staff receives ongoing professional development training and cross-training
- Meet the needs of employers by implementing and scaling career pathways
- Improve the quality of the workforce by improving alignment and partner connections
- Align investments in targeted populations and industry sectors
- Expand opportunities for employers and participants to engage in integrated learning and work experience activities
- Sharing resources and braiding funds for tools and services that support the region as a whole

2Dii. Describe any regional administrative cost arrangements, including the pooling of funds for administrative costs for the region.

The three boards in the Orange County RPU collaborate on multiple projects, with one or the other board acting as the fiscal agent. The RPU does not have any overarching arrangements or intent to pool funds for administrative costs at this time.

Orange County RPU's goal is to better align workforce services with economic development, educational institutions, and business. The boards will consider administrative costs arrangements if it allows the RPU to accomplish the objectives of the RPU more efficiently.

DRAFT

APPENDICES:

3A. STAKEHOLDER AND COMMUNITY ENGAGEMENT SUMMARY

Mode of Outreach	Target of Outreach	Summary of Attendance	Comments
Email, phone, social media, local board websites, Eventbrite	WIOA Core Program Partners	76 individuals registered and 43 attended	The meeting was well attended by representatives from several core partner agencies. We had representatives from the local boards, adult schools, community colleges, conservation corps, job corps, community-based organizations, and housing authorities, EDD.
Email, phone, social media, local board websites, Eventbrite	CalFresh Employment and Training Partners	38 individuals registered and 27 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, Orange County Social Services Agency.
Email, phone, social media, local board websites, Eventbrite	Child Support Services Partners	27 individuals registered and 18 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, Orange County Social Services Agency.
Email, phone, social media, local board websites, Eventbrite	Competitive Integrated Employment Partners	34 individuals registered and 28 attended	The meeting was attended by representatives from the local boards, community colleges, ROP programs, Goodwill Industry, City of Irvine Disabilities, and other community-based organizations.

Email, phone, social media, local board websites, Eventbrite	English Language Learners Partners	22 individuals registered and 19 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, adult schools.
Email, phone, social media, local board websites, Eventbrite	Re-Entry Services Partners	40 individuals registered and 24 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, State Parole, Orange County Sheriff, Mental Health Services
Email, social media, local board websites, Eventbrite	Community at large, Businesses, Chambers, Core Partners	66 individuals registered and 33 attended	The meeting was attended by representatives from the local boards, community colleges, community-based organizations, adult schools, Veteran Serving Organizations, EDD, State of California WSB.

3B. PUBLIC COMMENTS RECEIVED THAT DISAGREE WITH THE REGIONAL PLAN

DRAFT

3C. SIGNATURE PAGE

ORANGE COUNTY REGIONAL PLANNING UNIT

The regional plan represents the Orange Regional Planning Unit efforts to maximize and coordinate resources available under Title I of the Workforce Innovation and Opportunity Act. This regional plan, inclusive of a unified local plan, is submitted for the period July 1, 2021, through June 30, 2025, in accordance with the provisions of WIOA.

LOCAL BOARD CHAIRS

ORANGE COUNTY WORKFORCE DEVELOPMENT BOARD

Signature

Teri Hollingsworth

Name

Chair, Orange County Workforce Development Board

Title

Date

ANAHEIM WORKFORCE DEVELOPMENT BOARD

Signature

Joe Paquette

Name

Chair, Anaheim Workforce Development Board

Title

Date

SANTA ANA WORKFORCE DEVELOPMENT BOARD

Signature

Stacey Sanchez

Name

Chair, Santa Ana Workforce Development Board

Title

Date

LOCAL ELECTED OFFICIALS

COUNTY OF ORANGE BOARD OF SUPERVISORS

Signature

Andrew Do

Name

Chair, Orange County Board of Supervisors

Title

Date

CITY OF ANAHEIM COUNCIL

Signature

Harry Sidhu

Name

Mayor, City of Anaheim

Title

Date

CITY OF SANTA ANA COUNCIL

Signature

Vicente Sarmiento

Name

Mayor, City of Santa Ana

Title

Date