



Jefferson and Franklin counties labor market analysis

July 2020

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Authorship:

- Mark C. White, PhD, Associate Extension Professor; State Specialist, Labor and Workforce Development; Interim Director, Institute of Public Policy, Truman School of Public Affairs.
- Robert Russell, PhD, Assistant Extension Professor; State Specialist, Labor and Workforce Development.
- Mistti Ritter, County Engagement Specialist in Community Economic Development, Jefferson County.

Technical inquiries can be directed to the [lead author](#).

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Executive Summary

Jefferson and Franklin counties occupy a unique place with the St. Louis metropolitan area. They are not urban job centers (e.g., St. Louis City, St. Louis County) or fast growing counties (e.g., St. Charles County), but rather are very similar counties that have experienced steady growth over the past decade. As commuter counties, the region's workers fill jobs based in Jefferson and Franklin counties and many other counties throughout the metro area.

As a result, the workforce's competitiveness matters to both employers in Jefferson and Franklin counties and the entire metro area. This report provides a detailed analysis of the Jefferson-Franklin regional workforce and the labor market needs of its employers.¹ Using a combination of secondary data analysis and stakeholder focus groups, we are able to identify regional workforce characteristics, current and future sources of industry and occupational demand, and the key challenges and priority workforce issues facing the Jefferson-Franklin region.

Detailed publically available information is often only provided at the broader regional level (e.g. St. Louis MO-IL Metropolitan Statistical Area) and therefore does not speak to the specific characteristics and conditions in Jefferson and Franklin counties. By contrast, this reports presents information that is specific to Jefferson and Franklin counties, and better contextualizes these counties, their workers, and their employer needs within the larger metropolitan area. It will help the region's key workforce development actors—the Jefferson/Franklin Regional Workforce Consortium, Jefferson and East Central Colleges, K-12 school systems, and University of Missouri Extension—make more data-driven decisions about how to more effectively meet the needs of their constituents (students, job seekers, and employers).

Key findings

About the region

- Although not as large as St. Louis County or as fast growing as St. Charles County, Jefferson and Franklin counties are similar counties that have demonstrated steady growth over the past decade.
- Jefferson and Franklin counties are predominantly commuter counties. Combined, these counties accounted for 5.4 percent of the state's population and 3.1 percent of the state's 2018 economy.
- In 2018, the Jefferson-Franklin region's per capita income (\$43,709) lagged behind both the state (\$47,746) and the nation (\$54,446).

¹ The report is intended to provide information that help the Jefferson/Franklin Regional Workforce Consortium more effectively serve two of its primary constituents—jobseekers and employers. The project was made possible through a generous grant from the Jefferson Memorial Community Foundation.

- COVID-19 has created significant economic disruption, at least in the short-term. In May 2020, there were 17,300 unemployed workers—an increase of over 10,000 since March 2020. Another 8,250 regional workers—or 5 percent of Jefferson and Franklin counties’ March labor force—left the labor market during the same period.

Labor force supply

- The region’s labor force is aging, but its overall labor force participation rate remains slightly higher than the state and nation.
- The share of workers with at least a high school degree is consistent with the rest of the metro area and the nation as a whole, but the Jefferson-Franklin region has a below average share of people with 4-year degrees.
 - Approximately 25 percent of the region’s population (Age 25+) have started, but not completed, 2- or 4-year degrees.
- Jefferson and Franklin counties are both commuter counties.
 - In 2017, 71 percent of workers that lived in Jefferson and Franklin counties worked outside of the region. These commuting patterns vary, as there are distinct differences between North and South Jefferson County, as well as East and West Franklin County.
- In addition to incumbent and displaced workers, the region must also assist new sources of workers looking to enter the workforce. This means finding career opportunities for youth looking to enter the workforce for the first time, or transitioning military moving into their civilian career.
 - In some instances, workers need assistance to move into a different type of work. In difficult economic times, workers must often create their own job through self-employment. For instance, there were 35,360 sole proprietors in Jefferson and Franklin counties; almost two-thirds of these proprietorships were in Jefferson County.

Employer demand

- Many of the region’s current and emerging jobs are in locally-serving industries such as trade, transportation and utilities (which accounts for about 1 out of every 5 jobs in the region), Government (which includes public schools), and education and health services.
- The region’s 14,000 manufacturing jobs are a critical part of the region’s economic base, and the sector accounts for 1 in 4 jobs in Franklin County.
 - Average annual wages in manufacturing are \$52,500, and therefore almost 30 percent higher than the regional average.

- Occupational projections reflect the region’s economic structure, as the occupations with the highest number of projected openings are found in areas such sales and food service (e.g., as food preparation and serving workers, cashiers and retail salespersons).
 - A growing population also leads to an increased demand for health services (e.g., registered nurses, nurses’ aides) and education (e.g., elementary school teachers, teachers’ aides).
- Two large employing industries—manufacturing and healthcare—create numerous middle skill occupations that align well with the educational attainment level of the regional workforce.
- Within the healthcare sector, almost a third of jobs were in occupations that typically required some form of postsecondary education but not a bachelor’s degree.
 - Nursing and allied health occupations are projected to have steady demand for workers to fill these occupations over the next decade.
 - Online jobs postings show that registered nurse positions are the most commonly advertised jobs, followed by other nursing jobs (e.g. CNA, LPN/LVN) and support positions such as patient service representatives, medical secretaries, and housekeepers.
 - Almost 1 out of 4 people completing certification and degree programs at Jefferson and East Central Colleges do so from a healthcare-related program.
- Over 55 percent of the region’s manufacturing workforce is in an occupation that typically requires more than one month of OJT.
 - The in-demand manufacturing jobs that require significant experience (more than one month of OJT) includes machinists, welders and a variety of machine operators and fabricators.
 - Occupations that typically require an associate’s degree or postsecondary certification (e.g., tool and die makers, industrial engineering technicians, mechanical drafters and CNC machine tool programmers) all have average annual earnings above \$50,000.

Moving forward

Moving forward, the Jefferson/Franklin Regional Workforce Consortium—and its private sector, government, higher education, and K-12 partners—can focus on a number of activities that would better prepare workers for jobs and meet employer workforce needs. The current economic and public health challenges created by the COVID-19 pandemic, makes it difficult for people to fully engage in longer-term planning. This crisis will subside at some point in the future and these longer-term challenges will still need to be addressed.

The region can address some of these challenges by:

- **Raising career awareness among new workers:** The Jefferson/Franklin Regional Workforce Consortium and its partners should work to promote careers in important industries (e.g., health

care, manufacturing, construction) that offer multiple career opportunities and pathways. They should also work to create a wide array of work-based learning and career exploration opportunities for students.

- **Promoting continuing education and career pathways for displaced workers:** Continuing education is a tool that can be used to better position displaced workers for reenter the workforce. It can also equip incumbent workers with the skills they need to switch careers or keep their skills current and up to date. One segment of the population that perhaps needs the most support and assistance are the roughly 1 out every 4 people (aged 25+) in the region has a high school degree and some college credit, but has not completed their post-secondary degree.
- **Increasing awareness and usage of existing workforce support programs:** In an era of tight resources there are limited opportunities to create new programs, so increasing usage of existing programs is one way to expand continuing education within the region. Many employers, particularly small employers, are unaware of these programs or how to access them. As a result, the Jefferson/Franklin Regional Workforce Consortium could expand its efforts to promote existing programs such as ACT WorkKeys, customized training, apprenticeships, and entrepreneurial and small business support services.

The areas for moving forward laid out above all involve the Jefferson/Franklin Regional Workforce Consortium working to expand its capacity to serve as a convener, promoter and investor in regional efforts to address pressing workforce challenges.

Introduction

Jefferson and Franklin counties occupy a unique place within the broader St. Louis, MO metropolitan statistical area (hereafter the St. Louis metro area). These counties differ from other parts of the metro area in that they are not the primary urban job centers (e.g., St. Louis City, St. Louis County), nor are they the fastest growing counties (e.g., St. Charles County). Rather they are stable, largely residential counties that face a distinct set of economic and workforce challenges that must be addressed for them to continue growing and prospering.

This report provides a detailed analysis of the Jefferson-Franklin regional workforce and the labor market needs of its employers.² The analysis draws upon a variety of public data sources to describe key economic and workforce trends and characteristics. Data provided primarily by Economic Modeling Specialists International (EMSI)—a nationally recognized proprietary vendor of labor market information—allows us to identify current and future sources of industry and occupational demand within the region.³ In addition, multiple focus groups held in Franklin and Jefferson counties allowed us to better understand some of the key challenges and priority workforce issues facing the Jefferson-Franklin region.

Understanding these trends and issues is a necessary step for making strategic decisions about the how to respond to the region's workforce challenges and opportunities. Often detailed publically available information is only provided at the regional level (e.g. St. Louis MO-IL Metropolitan Statistical Area) and therefore does not speak to the specific characteristics and conditions in Jefferson and Franklin counties. By contrast, this report presents information that is specific to Jefferson and Franklin counties and better contextualizes their positions within the metro area. It will help the region's key workforce development actors— the Jefferson/Franklin Regional Workforce Consortium, Jefferson and East Central Colleges, K-12 school systems, and University of Missouri Extension —make more data-driven decisions about how to more effectively meet the needs of their constituents (students, job seekers, and employers).

Conducting any kind of economic and workforce analysis in the midst of the COVID-19 pandemic can prove challenging. At the time of this writing (May to June 2020), there remains a high degree of economic uncertainty about the depth and length of the current economic downturn. Given the magnitude and severity of the crisis, focusing on the region's longer-term workforce challenges can prove difficult. Nevertheless, addressing long-term workforce challenges remains an important priority and can be achieved through greater information and collaboration.

This report is organized as follows. It first examines the economic trends shaping the Jefferson-Franklin regional economy and how those trends compare to the nation and the rest of the St. Louis metro area.

² The report is intended to provide information that help the Jefferson/Franklin Regional Workforce Consortium more effectively serve two of its primary constituents—jobseekers and employers. The project was made possible through a generous grant from the Jefferson Memorial Community Foundation.

³ Unless noted otherwise, the labor market information presented in this section is drawn from Economic Modeling Specialists International (EMSI). The EMSI data combine U.S. Bureau of Labor Statistics employment payroll data from its Quarterly Census of Employment and Wages. EMSI then estimates data where BLS privacy standards do not allow it to disclose publicly. These estimates allow us to get greater industry detail, as well as detailed industry data specific to Jefferson and Franklin counties.

It then describes regional workforce characteristics and trends (e.g., age, labor force participation, educational attainment, etc.) within the context of the St. Louis metro, and the state more broadly. Given the region's residential nature, we also consider the commuting patterns of workers within the region and across the broader metro area.

In addition to these labor supply issues, the report also examines the region's demand for workers. We pay particular attention to the current and projected demand for specific occupations. Given the regional importance of healthcare and manufacturing, we provide further analysis of these two important sectors. As a result, we use online job advertisements to understand their short-term workforce needs, and ten-year occupational projections to forecast their longer-term occupational needs.



The report concludes by highlighting several key findings and offering several broad recommendations for the region. These recommendations are intended to help the Jefferson/Franklin Regional Workforce Consortium and its partners focus their workforce development efforts moving forward. These recommendations focus around ongoing challenges such as creating career exploration or work-based learning opportunities for students, or ensuring that employers have access to the training and support they need to keep their workforce competitive. In spite of the current economic crisis the economy will eventually recover and the region must be proactive prepare to address these issues.

About the region and its economic performance

Among the counties of the St. Louis metro area, Jefferson and Franklin counties possess many similar economic and demographic characteristics. This section will describe the Jefferson-Franklin region's economic performance, relative to the state and the rest of the St. Louis, MO metro area. Many of the region's economic trends have been relatively consistent over the past decade. The social and economic consequences of the COVID-19 pandemic introduce some future uncertainty, but over the long-term these trends will likely continue.

Population trends affect local and regional economic conditions

In many parts of the St. Louis metro area, including Jefferson and Franklin counties, population growth is a primary determinant of economic growth. Both Jefferson and Franklin counties are residential centers within the broader St. Louis metro area. According to the US Census Bureau's annual population estimates, both counties grew 0.3 percent annually since 2010 (Figure 1). This pace of growth lags behind the national growth rate of 0.7 percent, but is consistent with both the state (0.3 percent) and the metro area (0.2 percent) during the same time period.

Overall the St. Louis, MO metro area is a slow growth region in a slow growth state, but there are differences within the region. The steady growth in Jefferson and Franklin counties falls between the

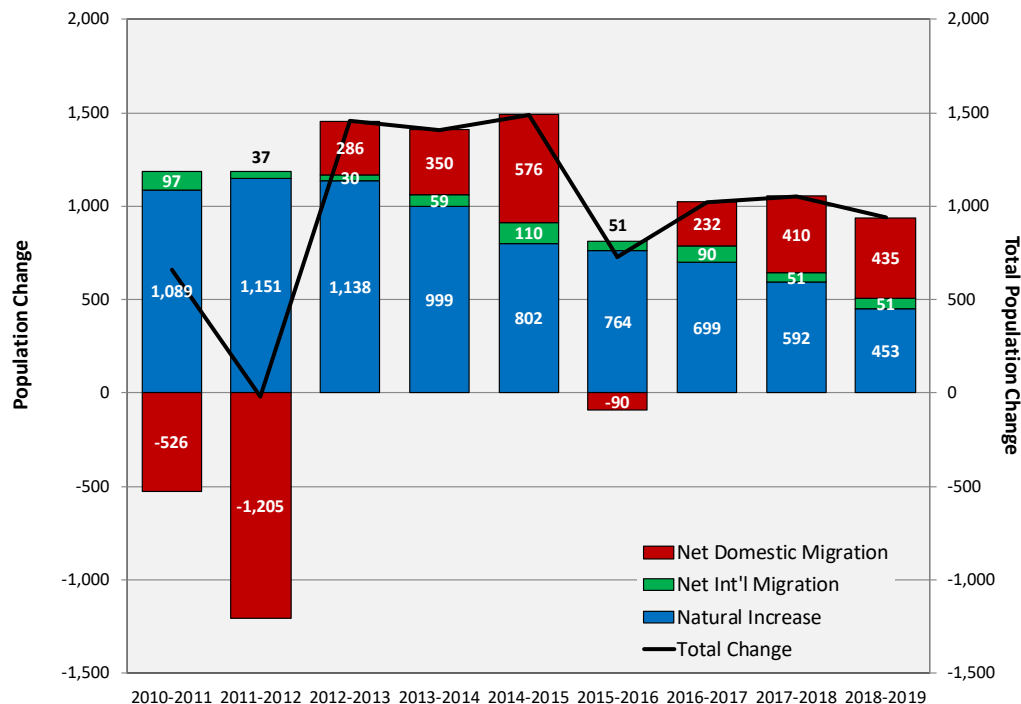
Figure 1: Population trends in the St. Louis, MO MSA (2019)

	2000 Population	2010 Population	2019 Population	Annual Growth (00-10)	Annual Growth (10-19)
United States	282,162,411	309,321,666	328,239,523	0.9%	0.7%
Missouri	5,607,285	5,995,974	6,137,428	0.7%	0.3%
St. Louis, MO MSA	2,029,863	2,111,015	2,145,243	0.4%	0.2%
Franklin	94,050	101,428	103,967	0.8%	0.3%
Jefferson	198,937	219,128	225,081	1.0%	0.3%
Lincoln	39,196	52,674	59,013	3.0%	1.3%
St. Charles	286,218	361,803	402,022	2.4%	1.2%
St. Louis	1,016,178	998,840	994,205	-0.2%	-0.1%
Warren	24,745	32,605	35,649	2.8%	1.0%
Washington	23,395	25,201	24,730	0.7%	-0.2%
St. Louis City	347,144	319,336	300,576	-0.8%	-0.7%

Source: US Census Bureau, Population and Housing Estimate, v2019

rapid growth of St. Charles and Lincoln counties and the population loss occurring in the metro area's urban core (St. Louis City and County). The Jefferson-Franklin region added a combined 8,500 net new residents since 2010, making these counties two of only 39 counties within the State of Missouri that experienced net population growth over the past decade. This population growth is one of the contributing factors that explains why Jefferson-Franklin region's locally-serving industries (e.g., healthcare, retail) have experienced job growth.

Figure 2: Components of population change in Jefferson and Franklin counties



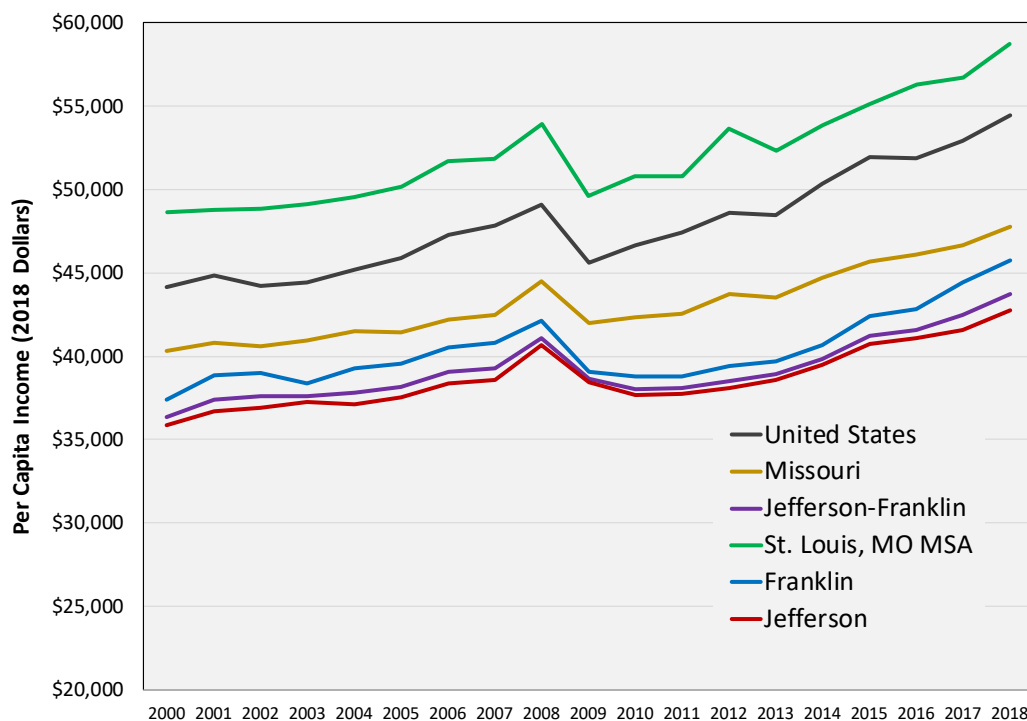
Source: US Census Bureau, Population Estimates Program, V2019

Since 2016, the region has added about 1,000 new residents per year, with the most growth occurring in Jefferson County’s unincorporated areas and Union in Franklin County. Figure 2 shows that natural increase (e.g., births minus deaths) accounted for much of the region’s population growth. However, over the past three years in-migration has been a growing source of population growth. Between 2018 and 2019, more than half of the region’s growth came from net domestic and international migration. Many of these in-migrants are likely coming from other parts of the metro area, but it net in-migration is often a characteristic of places that are attractive to live.

Per capita incomes lag behind the state and nation

According to the US Bureau of Economic Analysis (BEA), Jefferson and Franklin counties generated about \$10 billion of output in 2018. Jefferson and Franklin counties are predominantly residential counties, so their economic contributions are not commensurate with their contribution to the state’s population. Combined, they accounted for 3.1 percent of the state’s 2018 economy and 5.4 percent of the state’s population. Within the region, Franklin County—due to its large manufacturing sector—punches above its weight and was responsible for 45 percent of the region’s GDP, but only 32 percent of its population.

Figure 3: Per capita income change



Source: US Bureau of Economic Analysis

Figure 3 shows Per Capita Income (PCI) statistics for the Jefferson-Franklin region relative to the state and nation. At \$43,709 annually in 2018, the region’s PCI was about 92 percent of the Missouri’s PCI (\$47,746) and 80 percent of the nation’s annual PCI (\$54,446). Within the St. Louis metro area, PCI in Jefferson and Franklin counties lag behind the area’s wealthier counties, such as St. Louis (\$71,360) and St. Charles (\$53,745) counties. PCI growth was largely flat between 2000 and 2010, but increased over

Figure 4: Per Capita Incomes in the St. Louis, MO MSA

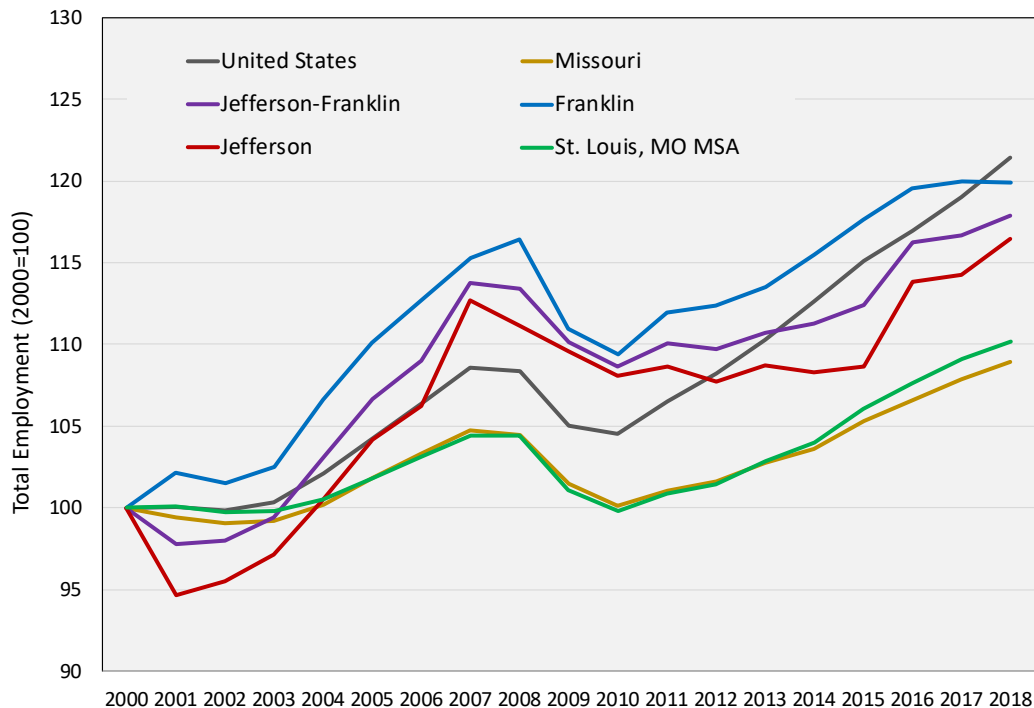
	2000	2010	2018	Annual Growth (00-10)	Annual Growth (10-18)
United States	\$44,146	\$46,628	\$54,446	0.5%	2.0%
Missouri	\$40,321	\$42,346	\$47,746	0.5%	1.5%
St. Louis, MO MSA	\$48,603	\$50,802	\$58,713	0.4%	1.8%
Jefferson-Franklin	\$36,362	\$38,034	\$43,709	0.5%	1.8%
Franklin	\$37,380	\$38,757	\$45,719	0.4%	2.1%
Jefferson	\$35,881	\$37,700	\$42,780	0.5%	1.6%
Lincoln	\$32,972	\$35,226	\$40,788	0.7%	1.8%
St. Charles	\$43,417	\$45,954	\$53,745	0.6%	2.0%
St. Louis	\$59,184	\$61,727	\$71,360	0.4%	1.8%
Warren	\$34,796	\$36,022	\$41,674	0.3%	1.8%
Washington	\$24,147	\$27,022	\$29,606	1.1%	1.1%
St. Louis City	\$36,634	\$40,893	\$47,643	1.1%	1.9%

Source: US Bureau of Economic Analysis, PCI adjusted for 2018 dollars

past decade. Between 2010 and 2018, PCI grew 1.8 percent annually which is slightly ahead of the state (1.5 percent) and consistent with the rest of the St. Louis, MO metro area (1.8 percent).

The growth of per capita incomes in Franklin County has helped raise the Jefferson-Franklin region's overall growth. Figure 4 shows that Franklin County's per capita income (\$45,719) is still below the state and national averages, but since 2010 Franklin County's per capita income has grown faster (2.1 percent

Figure 5: Total Employment Change (2000=100)



Source: US Bureau of Economic Analysis

Figure 6: Total employment in the St. Louis, MO MSA

	2000 Total Employment	2010 Total Employment	2018 Total Employment	Annual Growth (00-10)	Annual Growth (10-18)
United States	165,370,800	172,901,700	200,746,000	0.4%	1.9%
Missouri	3,470,846	3,475,301	3,779,836	0.0%	1.1%
St. Louis, MO MSA	1,339,817	1,337,233	1,476,397	0.0%	1.2%
Franklin	46,420	50,781	55,669	0.9%	1.2%
Jefferson	64,161	69,367	74,697	0.8%	0.9%
Lincoln	14,087	17,067	19,943	1.9%	2.0%
St. Charles	124,433	170,602	207,251	3.2%	2.5%
St. Louis	780,505	744,860	808,585	-0.5%	1.0%
Warren	9,626	10,649	12,179	1.0%	1.7%
Washington	7,228	6,565	7,296	-1.0%	1.3%
St. Louis City	293,357	267,342	290,777	-0.9%	1.1%

Source: US Bureau of Economic Analysis

annually) than any other Missouri county in the St. Louis metro area. Much of this growth has occurred in the last few years. Since 2016, Franklin County's per capita income has grown 3.4 percent annually—a much faster rate than either the state or nation.

Employment growth has exceeded the state, but the pace of growth has slowed since 2016

Employment growth within the Jefferson-Franklin region has exceeded statewide job growth over the past decade. Figure 5 shows that total regional employment is almost 18 percent higher than it was in 2000. By contrast, total employment statewide grew only 9 percent during the same period. In 2018, Jefferson County accounted for about 75,000 (57 percent) of the region's 130,000 jobs. As a result, it is the bigger, but slower growing of the two counties.

Figure 6 shows that since 2010 employment in Franklin County grew 1.2 percent annually, while employment growth in Jefferson County was somewhat slower (0.9 percent annually) during the same period. Even though Franklin County's per capita incomes have grown significantly since 2016, its total employment growth has been relatively flat. As a result, the county is becoming somewhat wealthier but this increased wealth has not yet translated into greater job growth.

COVID-19 has created significant economic disruption

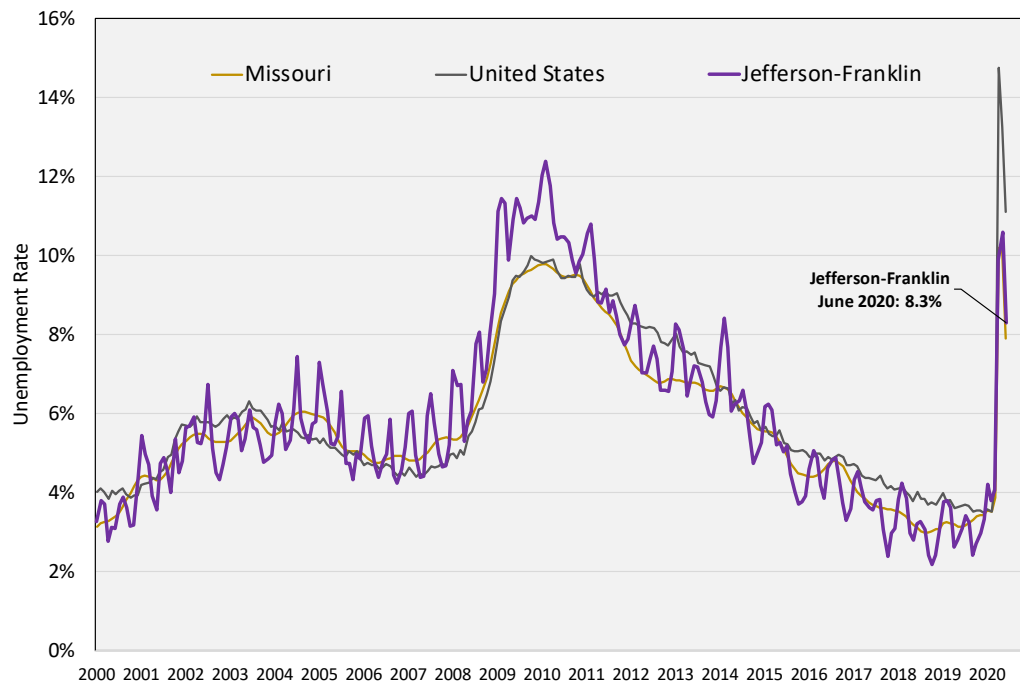
Over the past decade the longer-term trends have shown that Jefferson and Franklin counties have experienced steady population and employment growth, with more recent above average growth in per capita income. However, at the time of this writing the current economic outlook appears highly uncertain both in the short- and medium-term. The COVID-19 pandemic has created significant economic upheaval and Jefferson and Franklin counties have not been immune from those challenges.

Figure 7 shows that after a half-decade of relatively low unemployment, the region's unemployment rate spiked to 10.6 percent in May 2020. Both counties had similar unemployment rates, with Franklin County (10.9 percent) being slightly higher than the Jefferson County (10.4). These unemployment rates—which have remained relatively consistent with the rest of the metro area—started to come

down to just over 8 percent in June 2020 as the economy reopened. However, the economy remains somewhat unpredictable as COVID-19 outbreaks could once again severely restrict economic activity.

Given the COVID-19 pandemic, this remains a fluid situation but the economic impacts have nevertheless been profound. In June 2020, there were almost 14,000 unemployed workers—which is double the number in March 2020. Another 7,300 regional workers—or 4 percent of Jefferson and Franklin counties' March labor force—left the labor market during the same period. It should also be noted that these numbers represent an improvement from May 2020. Many of these job losses have occurred in sectors such as leisure and hospitality (incl. restaurants and hotels) and retail trade.

Figure 7: Unemployment in the Jefferson-Franklin region



Source: US Bureau of Labor Statistics; State and Nation seasonally adjusted, county rates are not seasonally adjusted

The extent to which the COVID-19 pandemic creates short-term shocks and/or long-term economic transformations remains to be seen. However, the region's fundamental workforce characteristics and economic foundations will not be transformed overnight. In spite of this uncertainty, greater knowledge of the basic characteristics and long-term trends shaping the regional economy and workforce can still inform regional workforce development efforts. The next two sections describe basic characteristics of the local labor force, and local sources of workforce demand.

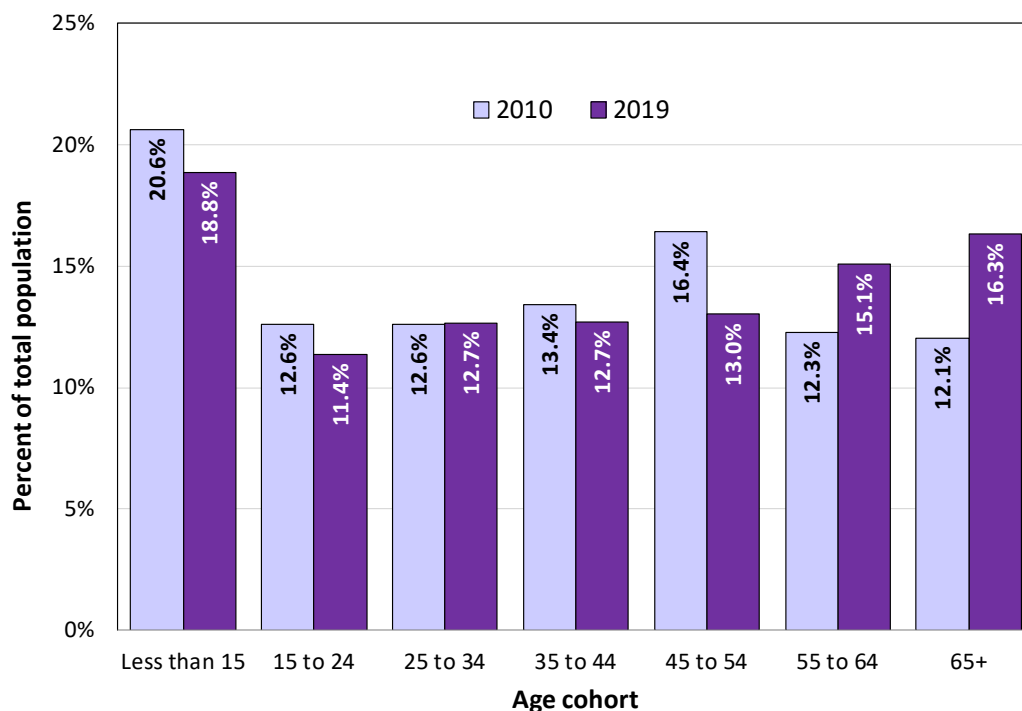
Labor force supply

The regional workforce cannot be viewed in a vacuum. The region's workers not only fill jobs based in Jefferson and Franklin counties, but many residents leave the region to work. As a result, the workforce's relative competitiveness matters to both employers in Jefferson and Franklin counties and employers throughout the entire metro area. This section describes some of the workforce characteristics, including workforce age, racial and ethnic diversity, overall level of educational attainment, and commuting patterns of Jefferson and Franklin counties' workforce.

The region's fastest population growth occurred in people aged 55 and older

Figure 8 shows that the Jefferson-Franklin region has an aging population. In 2010, 24.4 percent of the region's population was aged 55 and older; by 2019, 31.4 percent of the population fell within that age cohort. These demographic trends have consequences for the regional workforce, as the share of people in their prime working years (ages 25 to 54) has decreased by 4 percent (42.4 percent to 38.4 percent) over the past decade. These changes are generally consistent with state and national trends. Between 2010 and 2019, Missouri's 25 to 54 population declined 2.5 percent (40.2 percent to 37.7 percent) and nationally it declined 2 percent (41.1 percent to 39.1 percent).

Figure 8: Population by age cohort



Source: US Census Bureau, Population Estimates Program, v2019.

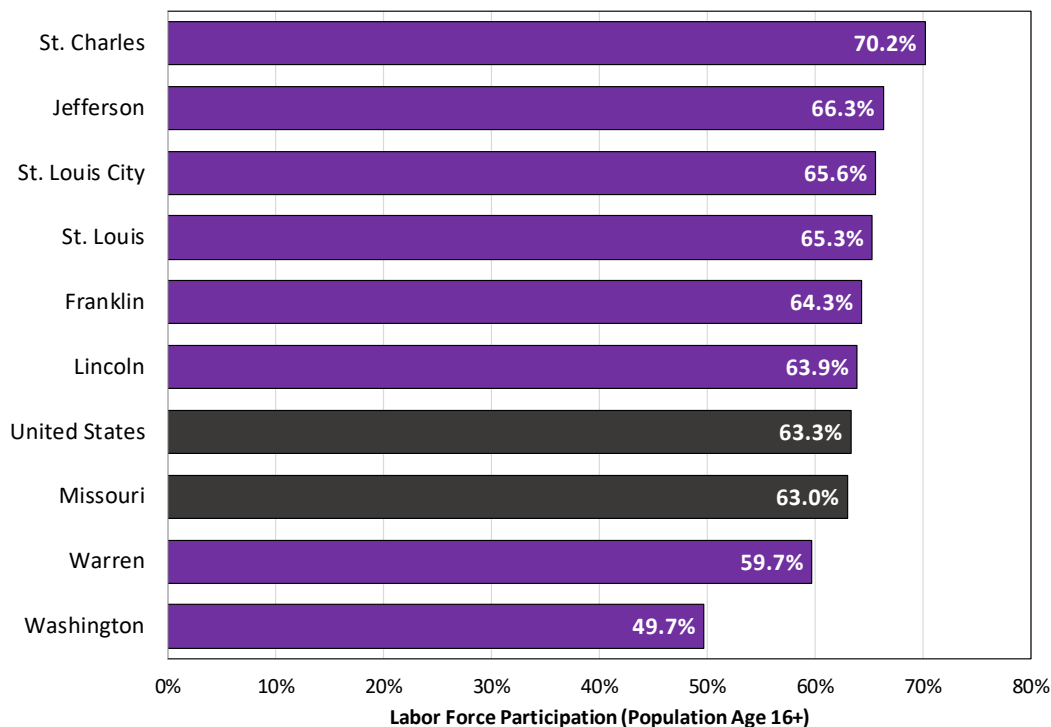
The region's labor force participation is slightly higher than the state and nation

Labor force participation rates measure the share of the working age population that is working or is actively searching for employment. According to the 2014-2018 American Community Survey, about 63

percent of the U.S. and Missouri populations aged 16 and older participated in the labor force. However, aging populations across many parts of the country (including the Jefferson-Franklin region) has led to lower labor force participation rates as the Baby Boom generation retires and the millennial generation fully enters the workforce.

Within the Jefferson-Franklin region, labor force participation rates run slightly higher than both the state and nation. Figure 9 shows that approximately 66 percent of working age people in Jefferson County were in the labor force, which trailed only St. Charles County (70.2 percent) amongst the Missouri counties of the St. Louis metro area. This means that there are approximately 170,000 people in the regional labor force. Workers with higher levels of educational attainment tend to be more active in the labor force, as are workers in their prime working years (ages 25-54). Among workers aged 20 to 64, men had higher labor force participation rates (85 percent) than women (74 percent).

Figure 9: Labor force participation rates in the St. Louis, MO MSA

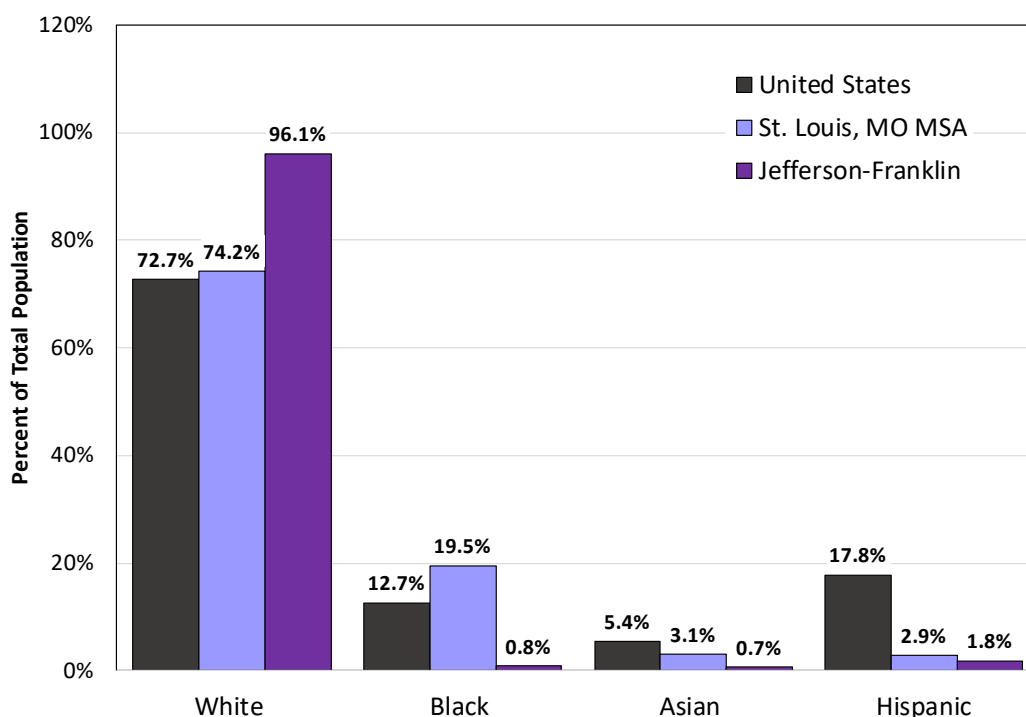


Source: US Census Bureau, 2014-2018 American Community Survey

The region has relatively limited racial and ethnic diversity

Figure 10 shows the racial and ethnic composition of the Jefferson-Franklin region and the St. Louis, MO metro area, relative to the state. The St. Louis, MO metro area is racially-diverse, but not ethnically diverse. More than a quarter of the metro area's population is not White, but the Hispanic population accounts for three percent of its population (relative to 18 percent of the US population). By contrast, the Jefferson-Franklin region lacks both racial and ethnic diversity. Over 96 percent of the region's population is White, non-Hispanic. As a result, the region's workers do not contribute to the diversity of the St. Louis metro area's workforce.

Figure 10: Population by race and ethnicity



Source: US Census Bureau, 2014 - 2018 American Community Survey

These racial and ethnic characteristics have consequences for some of the metro area's key employing sectors. According to the US Census Bureau's Longitudinal Household-Employer Dynamics (LEHD) Quarterly Workforce Indicators (QWI), with 28 percent of the metro area's health care workforce, the Black or African-American population is well represented relative to the metro area workforce overall. By contrast, Black or African-American workers are somewhat underrepresented in the metro area's manufacturing workforce (14 percent) relative to the metro area's overall workforce (18 percent). It is worth noting that the metro area's manufacturing sector is about 70 percent male, and the healthcare workforce is almost 80 percent female. Racial and ethnic minorities are perhaps most underrepresented in the metro area's construction industry, where Black or African-American (6 percent) or Hispanic (3 percent) workers comprise a relatively small share of the area's construction workforce.

Educational attainment is below average, particularly for those with 4-year degrees

At the most basic level, educational attainment within the Jefferson-Franklin region is consistent with state and national averages. Figure 11 shows that approximately 88 percent of the region's residents (age 25+) have at least a high school degree. This is roughly consistent with the state average of 89 percent and the national average of 87 percent. Within the region, Jefferson and Franklin counties trailed St. Charles and St. Louis counties, but were well ahead of St. Louis City and Washington County in the percentage of residents with at least a high school degree.

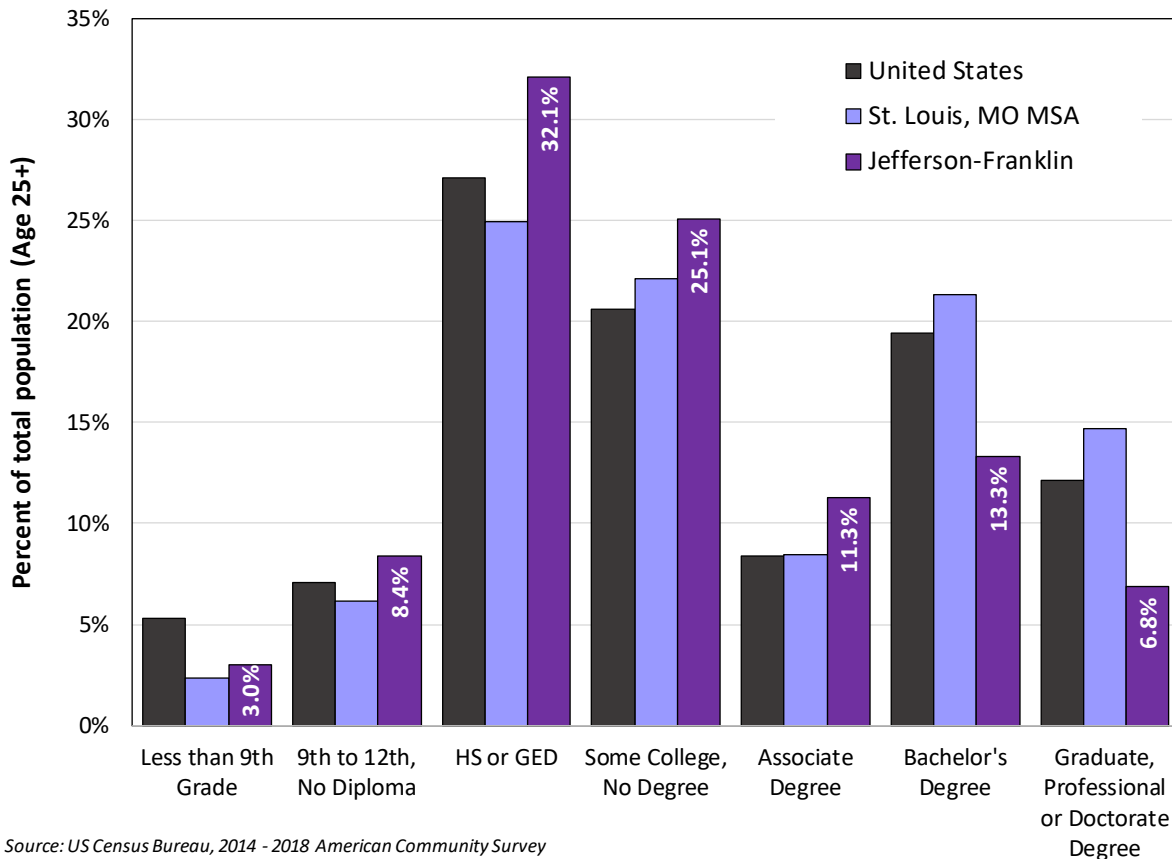
Figure 11: Educational attainment of counties in the St. Louis, MO MSA (Population aged 25+)

	High School or Greater	Bachelors or More
St. Louis	93.3%	43.2%
St. Charles	94.7%	37.8%
St. Louis City	86.9%	35.0%
<i>United States</i>	<i>87.7%</i>	<i>31.5%</i>
<i>Missouri</i>	<i>89.6%</i>	<i>28.6%</i>
Jefferson	88.8%	20.2%
Franklin	88.0%	20.1%
Warren	87.9%	18.6%
Lincoln	88.3%	15.9%
Washington	76.7%	9.4%

Source: American Community Survey, 2014-2018

However, more significant differences emerge when considering the share of the population with at least a 4-year degree where both Jefferson and Franklin counties lag significantly behind the nation and the state. Only 1 in 5 residents (age 25+) in the region had at least a 4-year degree, which is well behind the state (28 percent) and national averages (31 percent). It also significantly lags behind some peer

Figure 12: Educational attainment in Jefferson and Franklin counties (population age 25+)



counties in metro area, such as St. Louis County (43 percent), St. Charles County (37 percent), and St. Louis City (34 percent).

One of the factors contributing to this gap is that number of regional workers that started, but do not complete college. Figure 12 shows that approximately 25 percent of the region's population (age 25+)—an estimated 56,000 people—have a high school degree and some college, but have not completed a 2- or 4-year degree. This trend is consistent between Jefferson and Franklin counties, but represents a greater proportion of the population than the nation, state, or any other county within the St. Louis, MO metro area.

The lack of degree completions can potentially have consequences for people's earning power, as workers with higher levels of educational attainment tend to have higher paying jobs. This smaller proportion of people with post-secondary degrees—and particularly workers with at least a bachelor's degrees—contributes to the relatively low per capita incomes in Jefferson and Franklin counties. In order to help adults complete their degrees in a timelier manner, Jefferson College provides credit for prior learning.⁴ As a result, students who are proficient in a second language, have industry-recognized credentials (e.g. CompTIA in the IT field), have military educational and training credits, or have apprenticeship training can be awarded credits. These credits not only eliminate redundancy in learning, but also reduce the time and cost to adult learners.

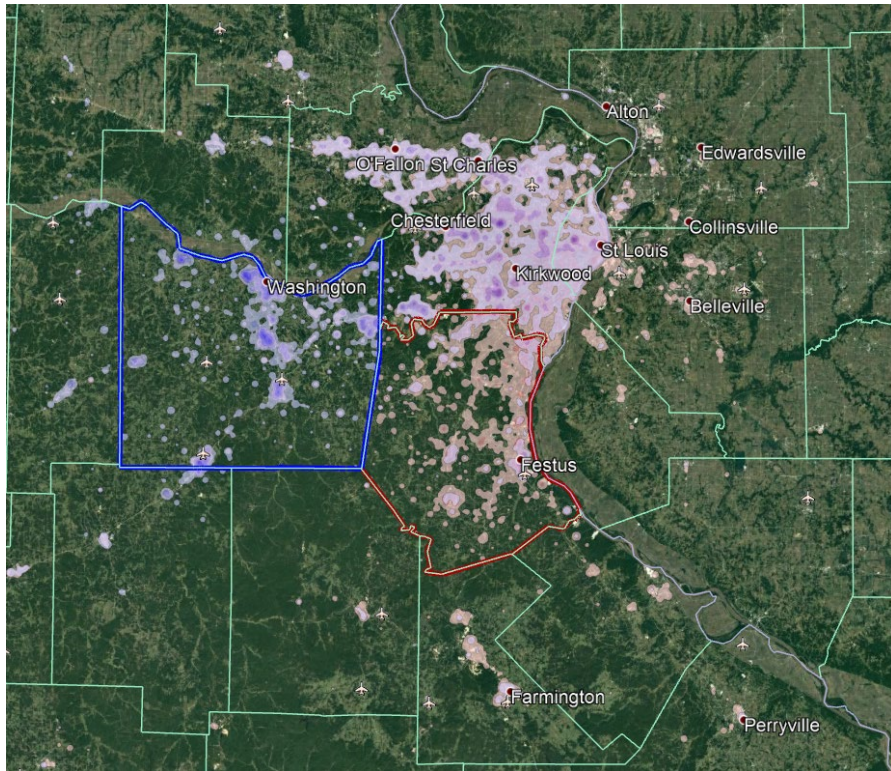


Jefferson and Franklin counties are both commuter counties

Many residents of Jefferson and Franklin counties travel throughout the metro area to go to work. Figure 13 shows that in 2017, 71 percent of workers that lived in Jefferson and Franklin counties worked outside of the region. Over half of the *workers that live* in Jefferson and Franklin counties commute to work in either St. Louis County (43 percent) or St. Louis City (11 percent). Figure 14 shows that among *workers that work* in Jefferson and Franklin counties, a greater proportion come from the region, as 55 percent of the people working in the region also lived in the region.

⁴ <https://www.jeffco.edu/current-students/admissions-enrollment/credit-prior-learning>

Figure 13: Where Jefferson-Franklin Residents Work

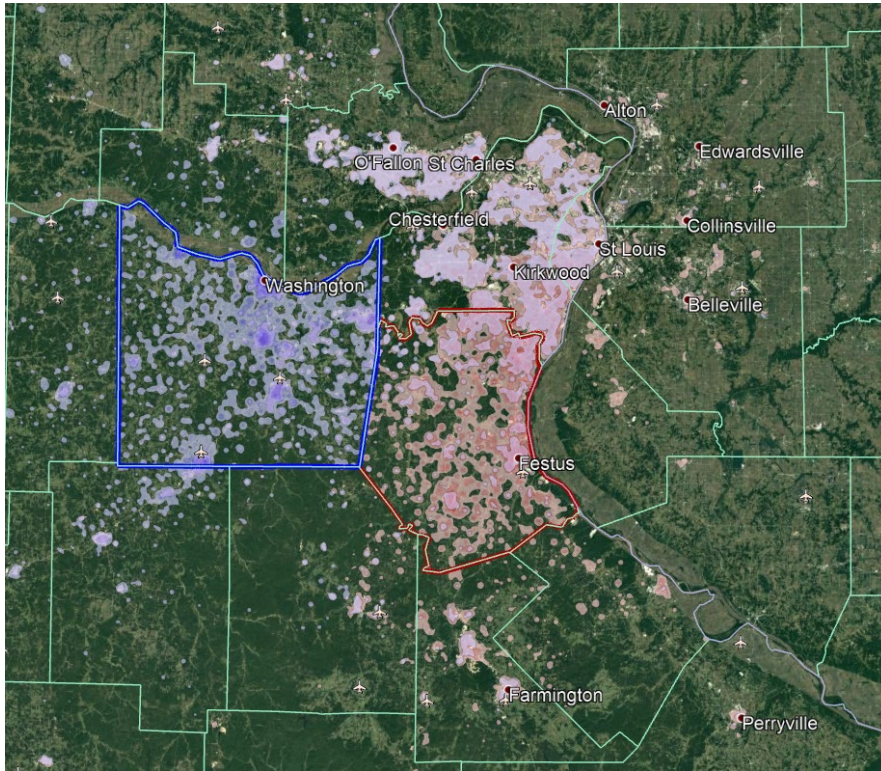


Source: US Census Bureau, Local Employment Dynamics, OnTheMap, 2017

Both counties are commuter counties, but there are a few key distinctions. In Jefferson County, 60 percent of workers that live in the county work in St. Louis County or St. Louis City. By contrast about 35 percent of workers living in Franklin County commute into St. Louis County or St. Louis City, and another 7 percent commute to St. Charles County. Roughly 40 percent of workers that live in Franklin County work in Franklin County, compared to only 20 percent of Jefferson County workers that live and work in Jefferson County.

The roads infrastructure facilitates these commuting patterns, as many Franklin and Jefferson County residents rely on Interstates 44 and 55, respectively, to get into St. Louis. However, the lack of a major connecting road between Franklin and Jefferson counties means that relatively few Jefferson County residents work in Franklin County and vice versa. Among workers who live in Franklin County, only 3 percent work in Jefferson County; just under 4 percent of workers who live in Jefferson County work in Franklin County. So although these counties are similar in many ways, there remains opportunities to create stronger functional connections between the two counties.

Figure 14: Where Jefferson-Franklin Workers Live

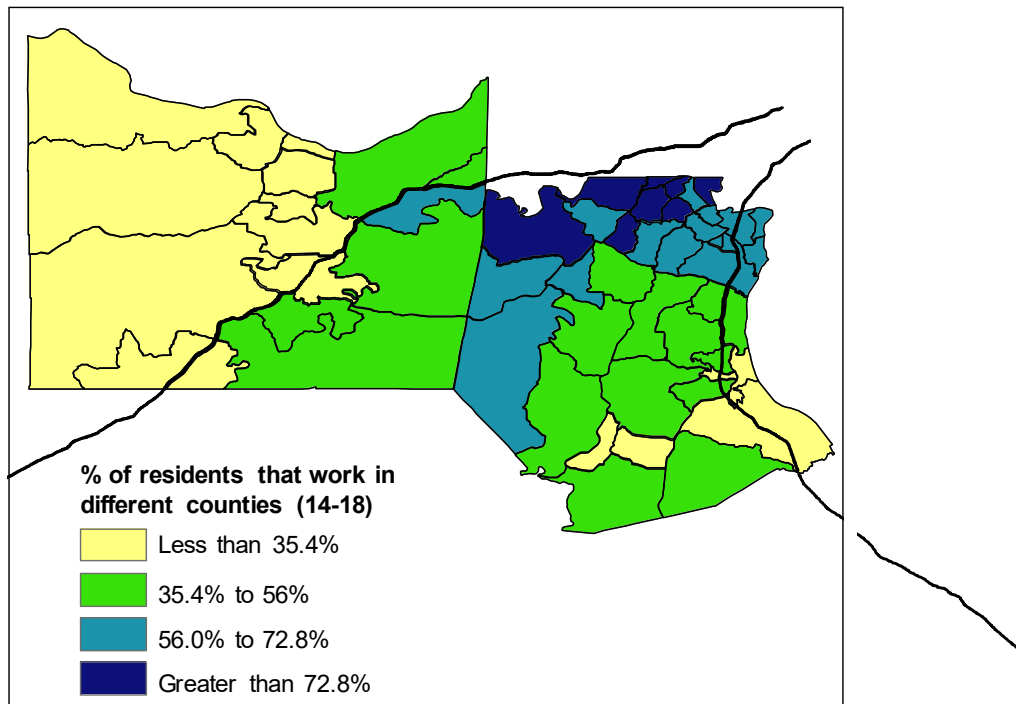


Source: US Census Bureau, Local Employment Dynamics, OnTheMap, 2017

These commuting patterns also reveal key differences within the counties. Figure 15 shows the percent of workers that work outside of their county of residence by census tract. These data show distinct differences between North and South Jefferson County, as well as East and West Franklin County. In some of the areas along Jefferson County's border with St. Louis County almost three-quarters of working residents, work outside the county. In Franklin County, less than a third of workers in areas west of Route 47 leave the county for work.

Regional stakeholders identified these intra-county differences as a critical regional challenge. There are few public transportation options in the region's more rural communities, which limits the number of employment opportunities available to the workers in those communities that do not have access to reliable personal transportation. For workers who live in southern Jefferson County, for instance, the

Figure 15: Percent of workers that work outside their home county



Source: US Census Bureau, American Community Survey (2014-2018)

lack of public transportation options hinders their ability to take advantage of employment and educational opportunities found elsewhere in the county.

Key workforce groups entering the workforce or moving into different types of work

In addition to incumbent and displaced workers, the region must also assist new sources of workers looking to enter the workforce. This means finding career opportunities for youth looking to enter the workforce for the first time, or transitioning military moving into their civilian career. In other instances, workers need assistance to move into a different type of work. In difficult economic times, workers must often create their own job through self-employment. This section describes the scale of these groups and the manner in which they are looking to enter or participate in the workforce.

Youth

Connecting young people to work opportunities is an important element of the public workforce system's mission. Youth employment opportunities not only help young people earn money, but the experience also prepares them for their future life in the workforce. According to the 2014-2018 American Community Survey, there are almost 8,000 workers aged 16 to 19 in the Jefferson and Franklin region; 5,300 in Jefferson County and 2,650 in Franklin County. These workers account for 50 percent of the 16,000 people in that age cohort. This figure is slightly higher than the Missouri counties of the St. Louis metro area overall (45 percent), the state (45 percent) and the nation (38 percent) during the same period. According to the LEHD QWI, the most common industries to employ younger workers (age 14-18) include food service and accommodation, and to a lesser extent retail trade.

Veterans

The 2014-2018 ACS estimates that Jefferson and Franklin counties are home to almost 12,000 working age (18-64) veterans. About 70 percent of these veterans live in Jefferson County. Veterans are viewed as important contributors to the regional workforce because they tend to possess many of the soft skills—basic leadership experience, working within organizational structures, and learning new processes and procedures—that regional employers want from their workforce.

Between, April 2012 and November 2018, just over 3,000 individuals from Jefferson and Franklin counties sought Division of Workforce Development services, and indicated that they had veteran status.⁵ Many of these veterans were transitioning out of their military career and into the civilian workforce. These individuals possessed several common characteristics, including:

- 90 percent were men.
- 90 percent had at least a high school degree, while almost 12 percent had at least a 4-year degree.
- These workers were mostly older, as only one-third were aged 45 or younger.
- The majority of these workers were interested in the types of occupations often found in the trades, such as Production (22.3 percent), Transportation (14.7 percent), Construction (11.7 percent) and Installation, Maintenance and Repair (11.1 percent).
- These figures are relatively consistent with the veteran jobseeker population statewide. The occupational interests of veteran jobseekers nevertheless align relatively well with the broad types of occupational demand found in Jefferson and Franklin counties. The primary exception to this alignment is in healthcare, which only about 2 percent of the veteran jobseekers in the region indicated an interest. This is likely due to disproportionate number of women that enter healthcare professions and the predominantly large proportion of men amongst veteran jobseekers.

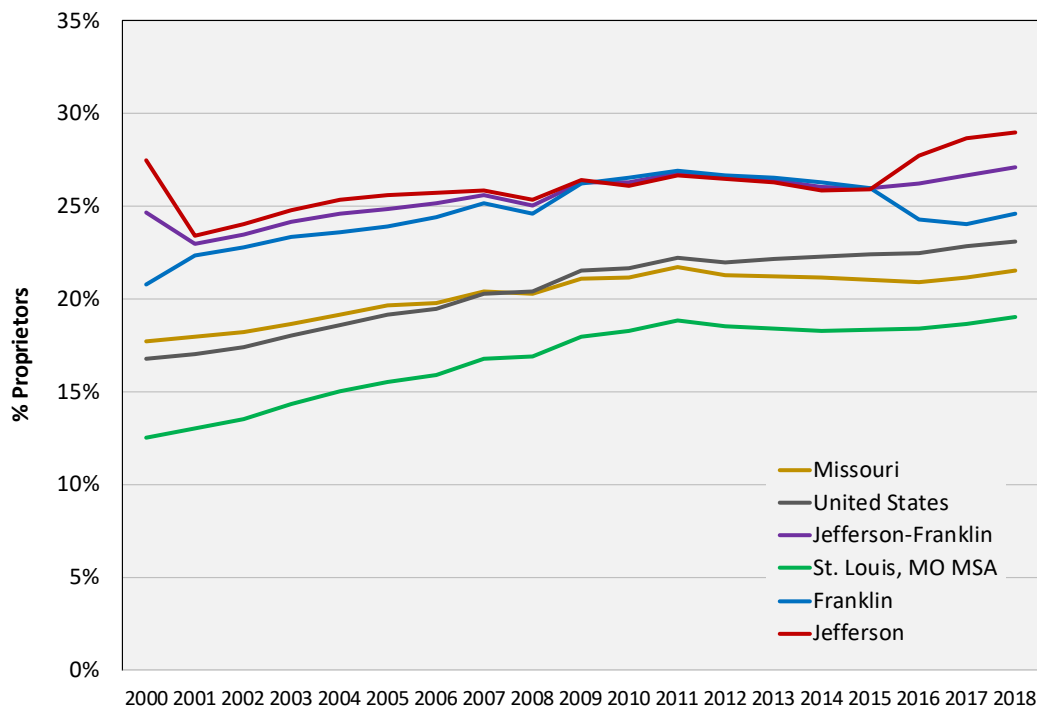
Entrepreneurs and the self-employed

While entrepreneurship is often viewed as a source of new companies, self-employment often occurs out of necessity rather than innovation. Particularly during difficult economic periods, self-employment is a vehicle for workers to supplement their current wages and take greater charge over their employment future and economic situation. Self-employed workers engage in a variety of activities such as management consultants, real estate agents, Uber drivers, or daycare providers. According the US Bureau of Economic Analysis, there were 35,360 sole proprietors in Jefferson and Franklin counties; consistent with population and employment within the region, almost two-thirds of these proprietorships were in Jefferson County.

Figure 16 shows that more than a quarter of all jobs in Jefferson and Franklin counties are sole proprietorships—a figure that is consistently higher than the nation, state or metro area. In 2018, the average proprietor income within Jefferson and Franklin counties was \$18,250 (\$19,250 in Jefferson

⁵ This information is drawn from data used by MU Extension and the Missouri Economic Research and Information Center (MERIC) to complete a statewide demographic and workforce overview of Missouri's Veterans. That report is available here: <https://extensiondata.missouri.edu/pub/pdf/miscpubs/mx0051.pdf>

Figure 16: Proprietorships as a percent of total income



Source: US Bureau of Economic Analysis

County, \$16,650 in Franklin County), which was 70 percent of the state average (\$26,050). The relatively low average proprietor income indicates that the majority of these jobs likely represent second jobs or sources of supplemental income.

While somewhat different than sole proprietorships, an examination of non-employers can show where individuals find opportunities to either earn extra income or create their own job.⁶ The US Census Bureau's Non-Employer Statistics (NES) show that Jefferson and Franklin counties had 20,450 non-employers in 2018 (67 percent were in Jefferson County). Among the region's non-employers, 16.5 percent (3,380) were in construction. Another 12 percent of non-employers were in 'other services' which includes activities like repair services, personal care (e.g. hair care, laundry services, pet care). Other industries with more than 2,000 non-employers in the region include retail trade; real estate; professional, scientific and consulting services; and administrative and support services. Transportation services (e.g., Uber/Lyft drivers) grew 18 percent between 2017 and 2018, with the vast majority of that increase occurring in Jefferson County.

These entrepreneurial trends are important to the region's overall workforce, as they help gauge the region's entrepreneurial capacity. They also highlight the areas where people are using their skills and knowledge to make money. These endeavors often help generate supplemental income, but in some instances—and with the proper support and guidance—these entrepreneurs might be able to convert these efforts into better paying wage and salary jobs or even new business starts.

⁶ Sole proprietorships are businesses that are owned and run by an individual, and there are no legal distinctions between the business and the individual. Non-employers are businesses with no paid employees and receipts greater than \$1,000 per year.

Employer demand

The section above describes the characteristics of the Jefferson-Franklin regional workforce. These workers fill positions both in the region, and throughout the St. Louis metro area, and preparing these workers for success is an important consideration. However, it is also important that employers within Jefferson and Franklin counties are able to find the workers they need to grow and succeed. As a result, we must also understand their current and future workforce needs. Examining employment trends and projections allows us to better understand the nature and extent of employer demand.

Industry and occupational employment data tell somewhat different stories. Industry data, based on the North American Industrial Classification System (NAICS), tells us **what companies make** (e.g., transportation equipment manufacturing), and which industries have added or lost employment. By contrast, occupational data, based upon the Standard Occupational Classification (SOC) system, explains **what workers do** (e.g., registered nurses, machinists, etc.). Using data provided primarily from Economic Modeling Specialists International (EMSI)—a nationally recognized proprietary vendor of labor market information—this section examines current and future sources of industry and occupational demand. These trends allow us to then identify the types of workers and training necessary to meet employer needs.

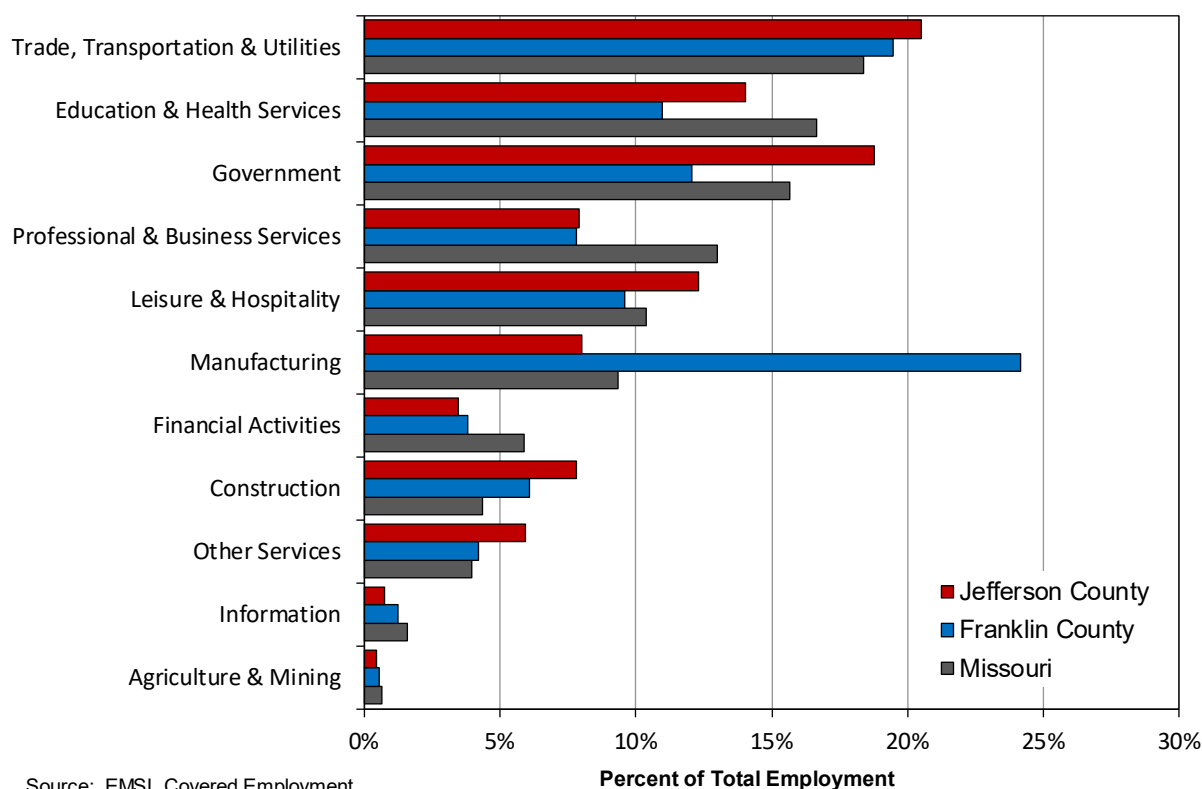


The structure of the regional economy dictates the demand for workers.

Many of the region's current and emerging jobs are in industries that serve Jefferson and Franklin counties' growing population. Figure 17 shows the share of wage and salary employment in the region by industry sector. Employment in sectors such as trade, transportation and utilities (including retail), education and health services, and government are locally-serving and generally recycle money within the community. Sectors like manufacturing are foundational to the region's economic base as they bring new money into the community. As shown below, each sector contains different sources of growth.

- *Trade, Transportation and Utilities* is the region's largest employing sector, and accounted for 1 out of every 5 jobs in the region (18,500) in 2019. Between 2014 and 2019 this sector added about 1,500 net new jobs, and most of this net growth occurred in retail trade (which was responsible for 70 percent of the sector's total employment). Although retail is a locally-serving industry, retail employment as a share of total employment is 35 percent greater in the Jefferson-Franklin region than it is nationwide. In spite of this relative strength, retail jobs are often part-time and pay below average wages. Annual wages within the region's retail trade industry are about 67 percent (\$27,200) of the regional average (\$40,300).

Figure 17: Share of wage and salary employment by sector (2019)



- Manufacturing* is critical part of Jefferson and Franklin counties' economic base. Twenty years ago manufacturing was the region's largest employing sector. In 2019, manufacturing contributed almost 14,000 jobs—15 percent of all jobs in the Jefferson-Franklin region. Regional manufacturers are particularly active in machinery manufacturing, plastics and rubber manufacturing and chemical manufacturing. These jobs also tend to be relatively good paying. Average annual wages in manufacturing are \$52,500, and therefore are almost 30 percent higher than the regional average. Manufacturing is particularly important in Franklin County, where the almost 10,000 manufacturing jobs represent 1 in 4 jobs in the county.
- Professional and Business Services* is the region's 6th largest sector, contributing about 7,250 jobs in the region or 8 percent of the total in 2019. Within these sector, 2,500 jobs were in the professional and technical services industry (which includes engineering, information, and consulting activities), and this industry grew about 25 percent between 2014 and 2019. These jobs tend to be relatively higher paying and export-oriented (bringing new money into the community), and are often located in more central, urban locations. Given the region's suburban nature, these activities are relatively underrepresented relative to the broader metro area. While industries such as engineering drove growth in the sector, job losses in industries such as call centers slowed overall growth in the region's professional and business services

sector. Employment in the region's telephone call centers declined from 860 to 325 between 2014 and 2019.

- Beyond the sectors discussed above, several other sectors make significant contributions to regional employment.
 - *Government* is the region's second largest sector employing about 14,500 workers. Roughly 90 percent of those workers are in local government (which includes public schools).
 - *Education and health services* represents almost 13 percent (11,675 jobs) of all regional jobs; leading employing industries within the sector include doctor's offices, nursing care facilities and hospitals (e.g. Mercy Health).
 - The region's *leisure and hospitality* sector generated over 10,000 jobs in 2019, most of which are in restaurants. This sector has been particularly impacted by the economic consequences of the COVID-19 pandemic.
 - The region's *construction* sector also contributed about 6,500 jobs. Construction employment has grown steadily since the recession, but remains well below its peak of 7,300 jobs in 2008.
 - *Agriculture* represents a relatively small number of wage and salary jobs (280 jobs). According to the US Bureau of Economic Analysis, however, the region was also home to almost 2,200 farm proprietors in 2018—72 percent of which were in Franklin County. As a result agriculture is a meaningful activity in the region's more rural areas, and for many an important source of supplemental income.



Occupational data highlights the types of workers that employers need.

Whereas industry data allows us to understand the types of activities undertaken by Jefferson and Franklin county employers, occupational data allows us to better understand what these employers need workers to actually do. However industries and occupations are related, and the large and growing occupations are reflective of the region's large and growing industries.

- Many of the region's most common occupations are in *sales and food service*. The region's three largest occupations are food preparation workers, cashiers and retail salespersons, which each accounted for at least 3,000 jobs in 2019. A growing population also leads to an increased demand for health services, and as a result Jefferson and Franklin county employers also employ significant numbers of personal care assistants (1,750 jobs), registered nurses (1,400 jobs), and nursing assistants (1,130 jobs). Similarly, the public school systems are also significant employers as secondary school teachers (1,130 jobs), elementary school teachers (1,130 jobs) and teacher

assistants (925 jobs) are all among Jefferson and Franklin counties' 20 most common occupations.



- Two occupations stand out among the region's *transportation and materials moving* occupations. In 2019, there were approximately 1,425 hand laborers and freight, stock, and material movers that support the movement of goods within the region, which was 200 more net jobs than there were in 2014. The region also had 1,335 heavy and tractor-trailer truck drivers in 2019, an increase of almost 235 net new jobs since 2014. This is a highly demanded occupation within the region, the broader St. Louis Metro Area, the state and the nation.
- Within the region's manufacturing sector, the most common *production* occupations in 2019 were first-line supervisors (620 jobs), machinists (620 jobs), assemblers and fabricators (590 jobs), and welders (475 jobs). With the exception of assemblers and fabricators, these occupations each added at least 70 net new jobs between 2014 and 2019. Although they often do not require more formal education than a high school degree, workers in these occupations often need significant on-the-job training (more than one month). Consequently, their average wages are similar to the St. Louis MO-IL, MSA median wage of roughly \$19 per hour.⁷
- Although fewer in number than many of the occupations listed above, *computer and mathematical* occupations are nevertheless important because they are good paying jobs that pay above average wages. They are often the types of jobs that attract new residents to the region. In 2019, the Jefferson-Franklin region's most common computer occupations were computer user support specialists (240 jobs), computer systems analysts (225 jobs), applications software developers (205 jobs), and network and computer systems administrators (160 jobs). With the exception of computer user support specialists, these jobs typically require a 4-year degree and pay almost twice the regional average wage. Even though computer user support specialists requires less formal post-secondary education, workers in this occupation still earn average wages that just above the regional average wage. Moreover, this occupation is an important entry point for workers seeking to pursue careers in information technology.

Employment projections highlight the next decade's in-demand job opportunities.

The above trends describe the current composition of the Jefferson-Franklin workforce. Industry and occupation employment projections (developed by EMSI) can provide further indication about the types of jobs that Jefferson and Franklin county employers will need to fill in the future. It is important to note that no one has a crystal ball, and past performance informs much of these forward looking projections.

⁷ Missouri Economic Research and Information Center, [2019 Occupational Employment and Wage Estimates](#).

This section, therefore, reviews industry and occupation employment trends in order to provide some insight about the job opportunities likely to emerge over the next decade.

Future industry demand

Manufacturing has been, and will continue to be, foundational to the region's economy particularly in Franklin County. EMSI's industry projections show that the region's manufacturing sector is projected to add over 800 net new jobs between 2019 and 2029. During this period, the industries within the sector that are projected to grow include transportation equipment manufacturing (600 net new jobs), machinery manufacturing (2,605 net new jobs) and food manufacturing (100 net new jobs).

Professional, scientific and technical services is another export-oriented industry projected to grow. Between 2019 and 2029, professional, scientific and technical services is project to add about 660 net new jobs. Most of these gains will occur in activities such as computer systems design; management, scientific, and technical consulting services; and advertising, public relations and related services. As noted above, these industries are important because they tend to pay above average wages.

Beyond the export-oriented activities discussed above, locally-serving industries such as retail and healthcare are projected to create much of the region's net new employment. For instance, healthcare and social assistance industries are projected to add almost 1,500 net new jobs in the region between 2019 and 2029. Most of these jobs will be in ambulatory healthcare services (e.g., doctor's offices) and social assistance (e.g., services for elderly and people with disabilities, childcare facilities).

Retail trade is another locally-serving industry projected to add jobs, as the region is projected to add roughly 775 net new jobs between 2019 and 2029; about 20 percent of this growth will be in general merchandise stores (e.g., Walmart, Target). Beyond retail, the region's food services industry is projected to add roughly 830 net new jobs over the next decade. Again, much of this growth is based on the assumption of continued population growth.

Future occupational demand

The projected number of openings can provide insight into the types of jobs that will need to be filled in the future. The types of occupations projected to create job opportunities reflect the region's large and/or growing industries. Using 10-year projections from EMSI, we can determine the average annual number of openings for each occupation and therefore we can better understand the education required of the region's workforce. Even though 68 percent of jobs in 2019 required a high school degree or less, 80 percent of the projected annual openings between 2019 and 2029 will require this level of education.

Figure 18: Projected occupations requiring a high school degree or less (2019-2029)

SOC	Description	2019 Jobs	Project Annual Openings (19-29)	Median Hourly Earnings	Typical Entry Level Educ.	Typical OJT
35-3021	Combined Food Prep. & Serving Workers, Incl. Fast Food	3,429	689	\$8.81	No formal edu. credential	Short-term OJT
41-2011	Cashiers	3,132	608	\$10.18	No formal edu. credential	Short-term OJT
41-2031	Retail Salespersons	3,075	503	\$11.20	No formal edu. credential	Short-term OJT
35-3031	Waiters & Waitresses	1,702	343	\$8.70	No formal edu. credential	Short-term OJT
39-9021	Personal Care Aides	1,741	320	\$10.29	HS diploma (incl. GED)	Short-term OJT
53-7062	Hand Laborers & Freight, Stock, & Material Movers	1,425	227	\$14.38	No formal edu. credential	Short-term OJT
43-6014	Sec'y's & Admin. Ass'ts, Except Legal, Medical, & Exec.	1,796	195	\$16.07	HS diploma (incl. GED)	Short-term OJT
43-5081	Stock Clerks & Order Fillers	1,325	193	\$10.95	HS diploma (incl. GED)	Short-term OJT
35-2014	Restaurant Cooks	1,106	187	\$10.80	No formal edu. credential	Moderate-term OJT
43-4051	Customer Service Representatives	1,212	159	\$15.84	HS diploma (incl. GED)	Short-term OJT

Source: Economic Modeling Specialists Int'l, 2020 Q4

The greatest number of openings are typically in occupations that require little education and pay relatively low wages. These conditions lead to higher turnover, and therefore more openings. Figure 18 shows that common occupations, such as food preparation and serving workers, cashiers and retail salespersons have the greatest number of projected annual openings. Each of these occupations will have over 500 annual openings in the region between 2019 and 2029, and they all pay well below the St. Louis, MO-IL MSA median wage of almost \$19/hr.⁸

By contrast, jobs that require more education have lower turnover rates and therefore have fewer projected openings. In 2019, 11 percent of the Jefferson-Franklin region's jobs required a 2-year degree or some college, and a similar percentage—(10 percent)—of annual openings required a comparable level of education. Figure 19 shows that among more middle-skill occupations, the highest number of projected annual openings over the next decade are for heavy and tractor-trailer truck drivers and nursing assistants. Among the in-demand middle skill occupations, occupations such as automotive service technicians and mechanics, licensed practical nurses, and heavy and tractor-trailer truck drivers pay relatively higher wages.

Much like the occupations requiring an associate's degree or some college, occupations requiring at least a 4-year degree pay better, have less turnover, but are fewer in number. Figure 20 shows that among these occupations, general and operations managers had the most projected annual openings (1,351/year) and also pay median hourly wages of almost \$40/hr. Other occupations requiring a 4-year

⁸ Missouri Economic Research and Information Center, [2019 Occupational Employment and Wage Estimates](#).

Figure 19: Projected occupations requiring more than a high school degree, but less than a 4-year degree (2019-2029)

SOC	Description	2019 Jobs	Project Annual Openings (19-29)	Median Hourly Earnings	Typical Entry Level Educ.	Typical OJT
53-3032	Heavy & Tractor-Trailer Truck Drivers	1,337	175	\$21.51	Postsec. nondegree award	Short-term OJT
31-1014	Nursing Ass'ts.	1,131	127	\$11.35	Postsec. nondegree award	None
25-9041	Teacher Ass'ts.	924	101	\$11.10	Some college, no degree	None
43-3031	Bookkeeping, Accounting, & Auditing Clerks	853	100	\$16.59	Some college, no degree	Moderate-term OJT
49-3023	Automotive Service Techs. & Mechanics	745	78	\$20.65	Postsec. nondegree award	Short-term OJT
39-5012	Hairdressers, Hairstylists, & Cosmetologists	214	38	\$10.19	Postsec. nondegree award	None
31-9091	Dental Ass'ts.	185	36	\$18.37	Postsec. nondegree award	None
31-9092	Medical Ass'ts.	250	35	\$15.22	Postsec. nondegree award	None
25-2011	Preschool Teachers, Except Spec. Education	270	34	\$12.49	2-year degree	None
29-2061	Licensed Practical & Licensed Voc. Nurses	404	30	\$20.45	Postsec. nondegree award	None

Source: Economic Modeling Specialists Int'l, 2020 Q4

degree with over 50 projected annual openings over the next ten years include school teachers, accountants and auditors, and registered nurses. Nine of the ten 4-year degree requiring occupations with the most projected annual openings all pay average wages above the region average; only substitute teachers—which is often a part-time occupation—pay below average wages.

Figure 20: Projected occupations requiring at least a 4-year degree (2019-2029)

SOC	Description	2019 Jobs	Project Annual Openings (19-29)	Median Hourly Earnings	Typical Entry Level Educ.	Typical OJT
11-1021	Gen. & Ops. Mgrs.	1,419	138	\$39.25	4-year degree	None
25-2021	Elem. School Teachers, Except Spec. Ed.	1,129	87	\$22.51	4-year degree	None
29-1141	Registered Nurses	1,395	84	\$29.00	4-year degree	None
25-2031	Secondary School Teachers, Except Spec. & CTE	1,129	83	\$26.48	4-year degree	None
25-3098	Substitute Teachers	536	64	\$12.15	4-year degree	None
13-2011	Accountants & Auditors	593	62	\$30.55	4-year degree	None
25-2022	Middle School Teachers, Except Except Spec. & CTE	718	56	\$25.08	4-year degree	None
13-1071	Human Resources Specialists	287	32	\$27.36	4-year degree	None
13-1161	Market Research Analysts & Marketing Specialists	210	29	\$27.02	4-year degree	None
21-1021	Child, Family, & School Social Workers	224	27	\$16.60	4-year degree	None

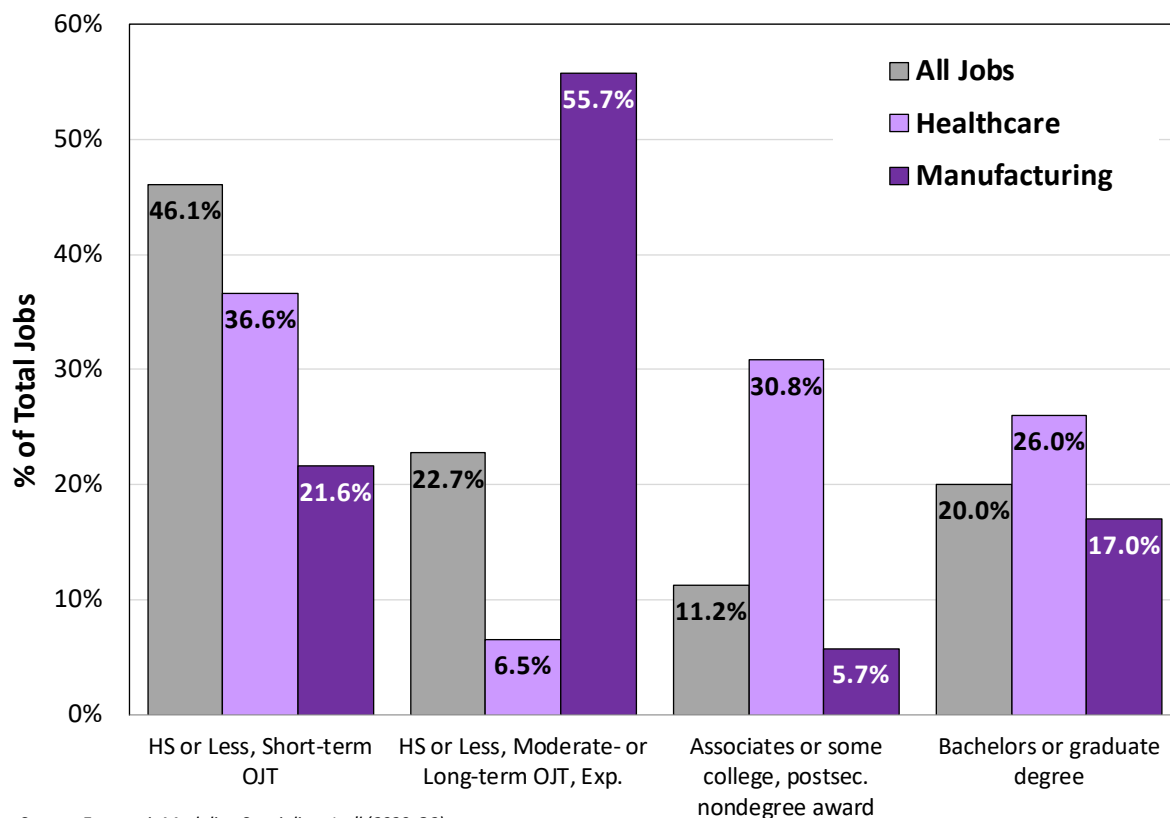
Source: Economic Modeling Specialists Int'l, 2020 Q4

The projected annual openings indicate likely sources of demand, and the occupations with the most projected annual openings often do not require post-secondary education. However employers make clear that even though they often do not need workers with specialized skills, but they do need workers who can learn and possess ‘essential’ workplace skills (e.g., ability to communicate, work in teams, and adhere to basic workplace rules and expectations). The workers that possess these essential skills are more likely to receive opportunities to grow and advance in their careers; those that do not are more likely to cycle through a series of relatively lower paying jobs.

Manufacturing and healthcare represent two important sources of opportunity

Within Jefferson and Franklin counties, two industries—manufacturing and healthcare—generate significant numbers of ‘middle-skill’ jobs which require additional post-secondary education and/or extensive training beyond high school, but often require less than a 4-year degree. Figure 21 shows the percentage of jobs by their typical education requirement, in the region’s healthcare and manufacturing sectors as well as the overall workforce. Whereas almost half of the region’s jobs require a high school degree or less and short-term (less than month) on-the-job training (OJT), only a third of healthcare workers and a fifth of manufacturing workers required similar levels of education. By contrast, over half of the region’s manufacturing workforce (55.7 percent) were in occupations that typically require moderate- (1 month to 1 year) or long-term (more than 1 year) OJT. Within the healthcare sector, almost a third of jobs were in occupations that typically required some form of postsecondary education

Figure 21: Percent of jobs by typical required education (2019)



but not a bachelor's degree. These kinds of occupations offer more than just a paycheck; they often allow workers to build careers through greater experience and continuing education.

Healthcare

Healthcare is an important source of employment, particularly for women who account for roughly 80 percent of Jefferson and Franklin counties' healthcare workforce. Healthcare jobs are found in a variety of places including hospitals, doctor's offices, assisted living and rehabilitation facilities, as well as providing home healthcare services. Whether in nursing or allied health professions, these occupations often present multiple career opportunities and pathways. Figures 22 and 23 show the most prominent occupations⁹ within the healthcare industry by the typical required level of education.

Figure 22 shows that the most common healthcare occupations requiring post-secondary education are found in nursing. Within Jefferson and Franklin counties, there are over 1,000 registered nurses and certified nursing assistants, and another 350 licensed practical and licensed vocational nurses. As a result, these occupations generate steady demand. They also illustrate the benefits that come from continuing education, as average earnings increase when moving from a CNA (\$23,600) to an LPN (\$42,500) to an RN (\$60,300). Similar gains are also in the dental industry where there is a big gap in median earnings from a dental assistant (\$38,200) to a dental hygienist (\$71,000).

Figure 22: Healthcare occupations requiring post-secondary education (2019-2029)

Occupation	Employment (2019)	Avg. Annual Openings (19-29)	Median Annual Earnings
Bachelors degree or more required			
Registered Nurses	1,227	72	\$60,323
Sub. Abuse, Behavioral Disorder, & Mental Health Counselors	121	17	\$34,440
Healthcare Social Workers	101	11	\$41,085
Medical & Health Services Managers	116	11	\$93,454
Child, Family, & School Social Workers	76	11	\$34,521
Associates degree or post-secondary certification required			
Nursing Assistants	1,073	117	\$23,608
Dental Assistants	225	33	\$38,205
Medical Assistants	253	32	\$31,655
Preschool Teachers, Except Special Education	244	26	\$25,976
Licensed Practical & Licensed Vocational Nurses	350	26	\$42,546
Dental Hygienists	227	22	\$71,069
Clinical Laboratory Technologists & Technicians	154	13	\$47,902

Source: Economic Modeling Specialists, Int'l (2020 Q2)

Beyond nursing, healthcare occupations that require at least a four year degree include medical and health services managers and a variety of counselors and social workers. Occupations requiring an associate's degree or some kind of post-secondary certification, include medical assistants or clinical lab technicians. Positions like radiologic technician are important, but the projected annual demand for these jobs pales in comparison to nursing occupations.

⁹ These occupations were identified by examining staffing patterns within healthcare and social assistance (NAICS 62)

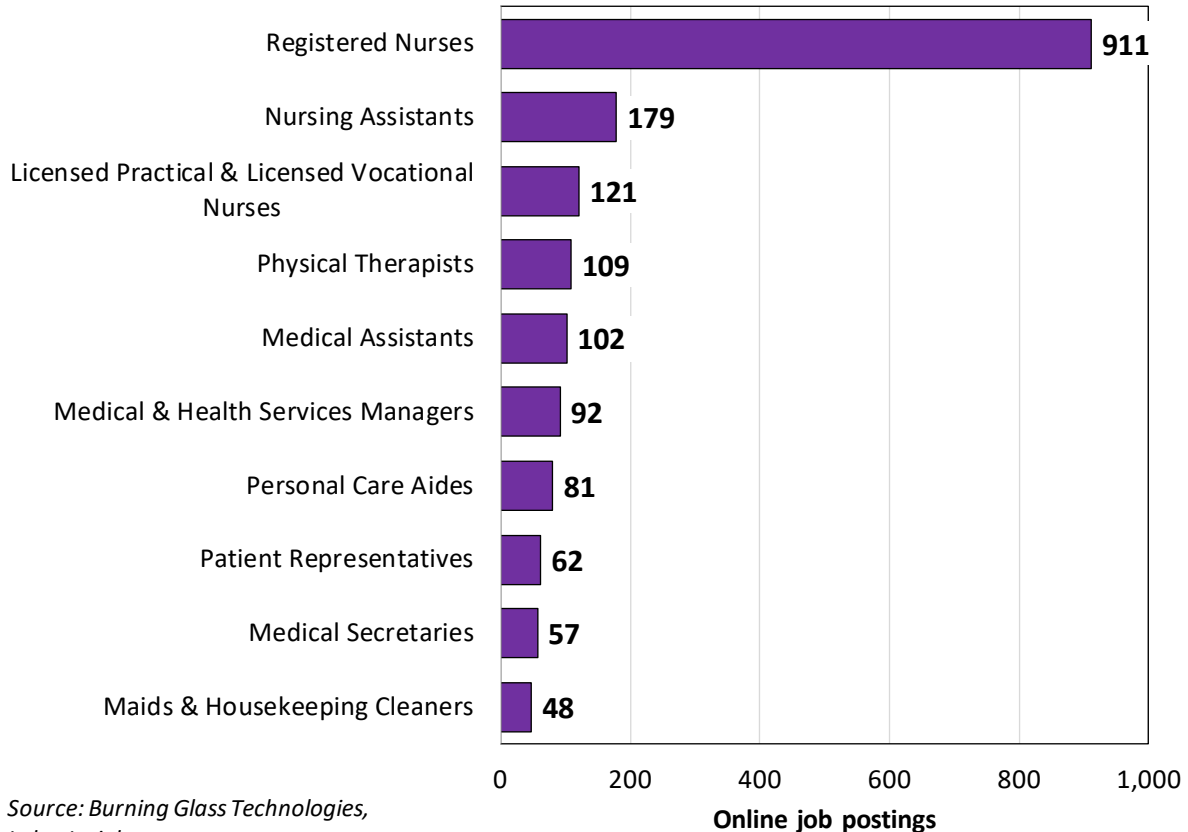
Figure 23: Healthcare occupations not requiring post-secondary education (2019-2029)

Occupation	Employment (2019)	Avg. Annual Openings (19-29)	Median Annual Earnings
No post-secondary education			
Personal Care Aides	1,672	287	\$21,400
Medical Secretaries	439	56	\$36,312
Childcare Workers	281	47	\$21,108
Home Health Aides	295	41	\$24,388
Receptionists & Information Clerks	188	29	\$26,260
Maids & Housekeeping Cleaners	163	22	\$20,253
Sec'y's & Admin. Ass'ts, Except Legal, Medical, & Exec.	160	18	\$33,421
Cooks, Institution & Cafeteria	127	18	\$21,598
Food Servers, Nonrestaurant	101	16	\$19,833
Office Clerks, General	112	15	\$26,002
Social & Human Service Assistants	64	11	\$27,192
Billing & Posting Clerks	91	11	\$32,944

Source: Economic Modeling Specialists, Int'l (2020 Q2)

The healthcare industry also needs a wide array of workers in occupations that do not require post-secondary education. Figure 23 shows that there are almost 1,700 personal care aides within Jefferson and Franklin counties. Regional employers will need to hire about 300 personal care aides per year over the next decade. Healthcare employers also must fill administrative, cleaning and food service positions,

Figure 24: Healthcare job postings in Jefferson and Franklin counties (2019)



Source: Burning Glass Technologies, LaborInsight

many of which do not require any post-secondary education. Regional hospitals and assisted living facilities noted that cleaning and food service jobs were particularly difficult to fill.

While these data show the projected long-term occupational needs within healthcare, an analysis of online job advertisements can illustrate where employers experience more immediate needs. The region's largest healthcare employers—Mercy Health, BJC Healthcare—accounted for the majority of healthcare-related job advertisements. In addition, dental chains (e.g. Aspen Dental) and assisted living facilities (e.g., HCR ManorCare) were another source of online job advertisements.

Figure 24 shows the most commonly advertised healthcare jobs in 2019. Registered nurse positions were the most commonly advertised jobs, and approximately 13 percent of those positions were for critical care nurses. Other nursing jobs (e.g. CNA, LPN/LVN) were also commonly advertised jobs. Support positions such as patient service representatives, medical secretaries, and housekeepers were also among the 10 most commonly advertised positions in 2019.

Jefferson and Franklin counties' healthcare employers face a number of challenges in meeting their workforce needs. These challenges include:

- The market for healthcare workers is regional in nature. For healthcare workers this creates a wider array of employment opportunities, provided they have reliable transportation. Healthcare employers in Jefferson and Franklin counties, however, must compete with employers elsewhere in the metro area—particularly in St. Louis County—that often pay higher wages. As with many jobs, workers are willing to travel further for better paying jobs. As a result, regional employers have been able to draw workers from smaller surrounding areas (e.g., Farmington) because employers in the St. Louis metro area pay better than in more rural areas.
- Creating a consistent pipeline of healthcare workers is crucial for meeting the region's long-term workforce needs. Several healthcare employers noted the importance of career exploration for showcasing the wide array of jobs and available career opportunities to young people. To this end, a number of the region's healthcare employers participate in career fairs and other school outreach programs. In addition, some employers support job shadowing opportunities to better expose students to what nurses or allied health professionals actually do in a typical workday. This type of exposure is important, not only to generate interest in healthcare-related careers, but also to direct students to the types of post-secondary education they need to enter these professions.
- Continuing education is vital for career advancement and worker retention. Within many healthcare professions, there are clear opportunities for career advancement with continuing education. This is particularly true in nursing where additional education allows workers to move from CNAs to LPNs to RNs and on to Nurse Practitioners. At each step, workers not only gain more responsibility but also receive greater compensation. To this end, partners such as Jefferson College and East Central College provide these educational opportunities, and employers provide the required clinical opportunities. Many employers recognize the benefits of these continuing educational opportunities, as a part of a grow-your-own strategy to filling

many of their key positions. As a result, employers provide financial support for workers looking to further their education. One employer noted that they had a loan forgiveness program to support nursing education, and viewed this program as critical for retaining their nursing staff. These kinds of retention programs are particularly important for workers that fill leadership or supervisory roles, as well as important positions such as critical care nurses.

Manufacturing

Whereas many middle-skill jobs in healthcare often require some form of post-secondary education, middle-skill jobs in manufacturing often are more reliant on experience and on-the-job training. Figure 25 shows the occupations within the manufacturing sector with the most projected annual openings over the next decade. Occupations that typically require moderate (1 month to 1 year) or long-term (more than 1 year) OJT include skilled production occupations such as machinists and welders, along with a variety of machine operators and assemblers and fabricators. Many of these occupations pay higher median annual earnings than the median earnings for all production workers within the St. Louis workforce development area (\$36,900).¹⁰ Production occupations are the most common occupations

Figure 25: Manufacturing occupations that do not require post-secondary education (2019-2029)

Occupation	Employed in MFG (2019)	Average Annual Openings in MFG (19-29)	Median Annual Earnings
No post-secondary education, but significant OJT required			
Machinists	580	67	\$42,492
Team Assemblers & Fabricators	512	61	\$38,433
Welders, Cutters, Solderers, & Brazers	368	46	\$36,136
Metal & Plastic Cutting, Punching, & Press Machine Operators	359	40	\$36,134
Inspectors, Testers, Sorters, Samplers, & Weighers	334	39	\$37,565
Packaging & Filling Machine Operators	302	38	\$28,913
Metal & Plastic Molding, Coremaking, & Casting Machine Operators	342	36	\$30,952
Sales Representatives, Wholesale & MFG Except Tech. & Sci. Products	312	35	\$57,174
Electronic, & Electromechanical Assemblers	259	32	\$30,313
All Other Production Workers	205	26	\$26,236
Metal & Plastic Computer-Controlled Machine Tool Operators	211	23	\$38,132
Paper Goods Machine Operators	217	23	\$44,287
General Maintenance & Repair Workers	216	23	\$35,986
Chemical Equipment Operators	211	21	\$40,694
No post-secondary education or significant OJT required			
First-Line Spvrs. of Production & Operating Workers	535	60	\$56,711
Hand Laborers & Freight, Stock, & Material Movers	348	53	\$29,909
Helpers--Production Workers	200	32	\$28,917
Shipping, Receiving, & Traffic Clerks	241	25	\$31,018
Customer Service Representatives	160	21	\$32,942

Source: Economic Modeling Specialists, Int'l (2019 Q4)

¹⁰ The Missouri Economic Research and Information Center (MERIC) defines the St. Louis Workforce Development Area as the counties contained in the Jefferson/Franklin Regional Workforce Consortium, the workforce investments in each of St. Charles County, St. Louis County, and St. Louis City. [2019 Occupational Employment and Wage Estimates](#).

within manufacturing, but the sector also needs workers to fill positions related to sales and general maintenance and repair.

Jobs that require more education and experience generally pay higher median annual wages. Figure 26 shows that jobs requiring an associate's degree or postsecondary certification often pay higher average earnings, but are fewer in number. For instance, occupations such as tool and die makers, industrial engineering technicians, mechanical drafters and CNC machine tool programmers all have average annual earnings above \$50,000. Similarly, workers in manufacturing occupations that typically require at least a 4-year degree (e.g., managers, engineers) make well above average wages.

Although the greatest demand for workers within manufacturing is in jobs that typically do not require a high schools degree, Figure 27 shows that regional manufacturers only posted 35 online job advertisements for production workers in 2019. Manufacturers typically do not advertise available positions online with the same regularity as healthcare employers, and instead rely more on employee referrals, temp-to-hire, or in some workplaces post through the union hall. Rather, the firms with the most job postings tend to be larger employers (e.g., General Dynamics, Alcoa), and they use to online job postings to address certain segments of their workforce. For instance, manufacturers advertising for jobs online did so for positions where the scale of demand is small but the need is great, such as engineers (e.g., computer, electrical), information technology staff (e.g., network administrators, software or web developers), or sales representatives.

Figure 26: Manufacturing occupations requiring post-secondary education (2019-2029)

Occupation	Employed in MFG (2019)	Average Annual Openings in MFG (19-29)	Median Annual Earnings
<i>Bachelors degree or more required</i>			
General & Operations Mgrs.	303	29	\$81,648
Industrial Engineers	240	22	\$86,285
Industrial Production Mgrs.	169	14	\$97,228
Accountants & Auditors	125	13	\$63,537
Mechanical Engineers	123	11	\$81,980
Buyers & Purchasing Agents	104	11	\$58,227
Electrical Engineers	115	9	\$89,729
<i>Associates degree or post-secondary certification required</i>			
Heavy & Tractor-Trailer Truck Drivers	170	21	\$44,744
Bookkeeping, Accounting, & Auditing Clerks	133	16	\$34,508
Tool & Die Makers	91	10	\$56,313
Industrial Engineering Techs.	79	9	\$57,263
Mechanical Drafters	59	6	\$53,007
Metal & Plastic CNC Machine Tool Programmers	42	5	\$59,785

Source: Economic Modeling Specialists, Int'l (2019 Q4)

Moving forward, Jefferson and Franklin counties' manufacturers must address several challenges to meet their ongoing and future workforce needs. These challenges include:

- Manufacturing as an industry is often misunderstood. Many people hold outdated stereotypes of manufacturing careers as requiring little skill, paying low wages and offering limited career opportunities. While the misperceptions are relatively common, Jefferson and Franklin counties also have some uniquely challenging misperceptions. Namely, several stakeholders noted that many workers are reluctant to encourage their children to pursue manufacturing careers because they, or a relative, were directly affected by Chrysler closing their Fenton assembly plants in 2008. While area workers are more likely to understand the work involved, they are more skeptical about manufacturing's long-term viability. Area manufacturers and stakeholders, therefore, must highlight the region's diverse array of manufacturing industries and opportunities and how these opportunities differ from their experience with the automotive industry during the last recession.
- In order to create a sustainable pipeline of manufacturing workers, young people—particularly non-college bound students—need greater exposure to manufacturing careers. This can happen in a number of ways. For instance, Jefferson College's Career and Technical Education (CTE) faculty will go to middle school career days and talk about what they do. However, employer engagement is critical. While large factory tours and open houses may be curtailed in the short- and medium-term due to COVID-19, there will remain a need to expose students to these kinds of workplaces. Jefferson College has also helped to organize Manufacturing Day¹¹ activities that provide local manufacturers the opportunity to talk about manufacturing careers, offer factory tours, or demonstrate robotic or 3-D printing equipment.
- Students can gain further exposure to these careers through work-based learning opportunities, but this requires a greater degree of collaboration between schools and employers. In order to help promote these kinds of opportunities, East Central College is exploring opportunities to implement its High School-to-Hire program—a partnership between high schools, manufacturers and East Central College designed to move students seamlessly from high school into the workforce. There are, however, key logistical issues that must be addressed. For instance, several stakeholders noted the importance of early releases from schools to allow students to get work to on time.
- Even though many non-college bound students can pursue manufacturing careers straight out of high school, this should not preclude them from pursuing post-secondary education. In fact, continuing education is critical for moving people into middle-skill careers and keeping them in manufacturing. Additional training and education allows workers to build greater skills, knowledge and experience and consequently advance in their careers. The State of Missouri has

¹¹ Manufacturing Day is a nation event held on the first Friday of October. It is designed to provide an opportunity for local manufacturers to open their doors to students, parents, teachers and community leaders so that they can learn more about careers in advanced manufacturing. <https://www.creatorswanted.org/mfgday/>

made a concerted effort to support and promote registered apprenticeships. Apprenticeships enable workers to pursue additional training and education, while continuing to earn a salary. They also help employers develop and retain good employees, particularly for key in-demand jobs like industrial maintenance.

Meeting the needs

Jefferson College and East Central College are the region's two most prominent education and training providers.¹² Figure 28 shows that between 2014 and 2018, an average of 930 students completed degrees and certificate programs at Jefferson College and East Central College averaged 505 completers. As with many community colleges, these institutions provide a relatively lower cost-alternative for students pursuing a post-secondary degree. In many instances, students plan to subsequently transfer to a 4-year institution. In 2018, 44 percent of Jefferson College completers and 55 percent of East Central College completers completed general studies or liberal arts degree programs that often prepare students for further post-secondary education.

However, community colleges also play a vital role in educating and training students—either through associate's degree or certification programs—to enter the workforce. Within Jefferson and Franklin counties, these programs have been critical for meeting the needs of the region's healthcare providers. Approximately 1 out of every 4 people completing a degree or certificate program at Jefferson College did so from a healthcare-related program; healthcare programs also accounted for 1 in 5 completers at East Central College. Many of these completers graduated from RN and LPN/LVN programs, as well as programs related to healthcare administration and allied health.¹³ Among allied health programs, both colleges have radiologic technology and occupational therapy programs, as well as EMT training programs. East Central and Jefferson College also have medical assistant programs, and Jefferson College has one of only three veterinary technician programs in Missouri.¹⁴

These colleges also offer programs that support the region's manufacturers. Between 2014 and 2018, Jefferson College and East Central College averaged about 55 and 35 completers from engineering and precision production-related programs, respectively. More specifically, Jefferson College offers certification programs related to manufacturing technology and welding, as well as degree programs in computer industrial manufacturing and applied technology (which can support workers pursuing careers

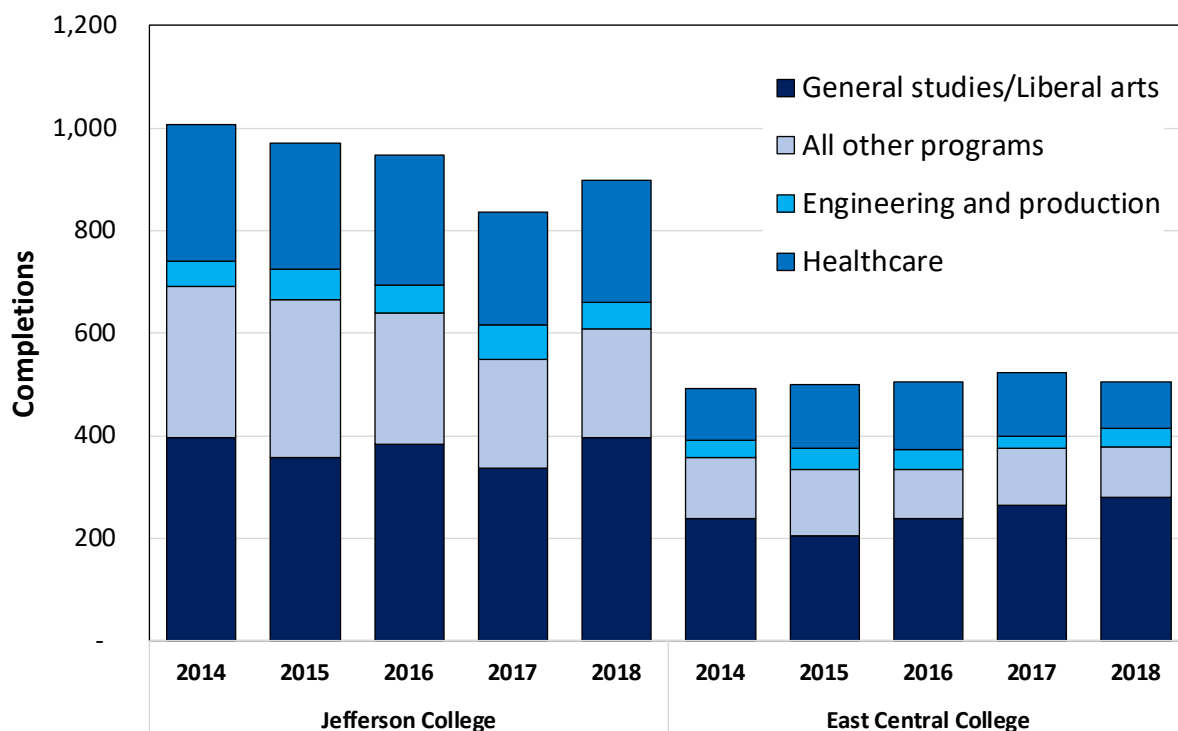


¹² Whereas Jefferson College serves Jefferson County, East Central College has a wider service area. In addition to Franklin County, East Central College also serves Warren, Gasconade, Osage, Maries, Phelps, Dent and Crawford Counties.

¹³ Four Rivers Career Center in Washington, MO also has a Licensed Practical Nursing program that had 27 completers in 2018.

¹⁴ The others are Crowder College and Metropolitan Community College. There will soon be a fourth program, as Moberly Area Community College is just starting a new Vet Tech program.

Figure 28: Degree and Certification Completions (2014-2018)



Source: National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS); EMSI

in industrial maintenance). The relevant programs at East Central College include degree and certification programs related to industrial engineering technology, biotechnology, precision machining and welding.

Many programs require students to have practical on-the-job experience as part of their course work and the region's employers provide venues for students to get that experience. These types of partnerships allow employers to try out potential employees before hiring them full-time. In many instances, these students are already employed and are seeking continuing education as a way to advance their careers.

In addition to degree and certification programs, community colleges are also key providers of customized training. This is particularly important for many manufacturers who look to the colleges to help train their workers on topics related to workplace safety (e.g., OSHA) or basic IT skills. As a result, the contributions that these colleges make to the region's workforce development efforts go far beyond their degree programs.

Moving forward

The COVID-19 pandemic has created a great deal of economic uncertainty, but at some point the economy will recover and once again will likely reflect more recent, long-term historical trends. These trends show that the Jefferson-Franklin region has experienced slow, steady growth over the past two

decades. These counties are largely residential counties and the majority of locally-created jobs are locally-serving, and as a result population growth drives the job creation. In addition, the majority of workers who live in the region, work outside of the region. This is particularly true in Jefferson County where 80 percent of workers work out of the county.

Regional workforce development efforts, therefore, must focus on better preparing workers for jobs in Jefferson and Franklin counties and throughout the broader metro area. The region faces a number of different workforce challenges, most notably a relatively low level of educational attainment. The Jefferson-Franklin region has a relatively low number of workers with a 4-year degree, but 25 percent of the population (age 25+)



have some college but did not finish their degrees. Therefore the region's workforce is best positioned for middle-skill jobs that requires more than high school and less than a bachelor's degree, but nevertheless offers workers career opportunities through additional training and continuing education. Many of these opportunities within the region are likely to be found in manufacturing and healthcare. Both industries provide a significant number of middle-skill job opportunities that allow people to build careers.

The current economic and public health challenges created by the COVID-19 pandemic makes it difficult for people to focus on longer-term planning. However, these crises will subside at some point in the future and these longer-term challenges will need to be addressed proactively. The trends and issues described above will continue to challenge the region's employers, workers and education and training providers. They will require consistent attention in order for the region to address them in a systematic and sustainable manner.

Areas for future action

Moving forward, the Jefferson/Franklin Regional Workforce Consortium—and its private sector, government, higher education, and K-12 partners—can focus on a number of activities that would better prepare workers for jobs and meet employer workforce needs. The Jefferson/Franklin Regional Workforce Consortium already provides a wide array of career services for workers including resume assistance, job placement, referrals to other agencies, and veteran's employment services. It also helps employers with hiring assistance, OJT wage reimbursements and other types of support programs. That said, the Jefferson/Franklin Regional Workforce Consortium can increase its impact through deeper collaboration with its partner organizations and institutions.

The current economic crisis and the challenges it creates, should not be dismissed. Not only are workers and employers under significant financial stress, but so too are state and local governments which limits their ability to respond to these crises or invest in more long-term solutions. Given this environment, the activities described below are basic fundamental activities for supporting the region's workforce in the

short-, medium-, long-term. In addition, they do not require significant investments of funding to support. These activities include:

1. Raising career awareness among new workers

Employers within key regional industries (e.g., health care, manufacturing, construction) offer a wide array of career opportunities and pathways. A consistent challenge that employers face is that many workers, particularly new workers, are unaware of these opportunities and the steps they need to take in order prepare themselves for these jobs. Since many of these jobs do not require a 4-year degree, the barriers to entry are not too onerous. Consequently, it is important for workers and students—particularly non-college bound students—to become more aware of these jobs and the longer-term opportunities they provide.

There are a variety of ways to promote career exploration. Often employers will come to schools, either through career fairs or individual presentations, to describe the range of jobs found in their businesses. For instance, construction trades unions will come to area schools to highlight career opportunities in the trades. Similarly, facility tours can help students better visualize what different workplaces look like. The region's community colleges, in partnership with area manufacturers, have also organized 'Manufacturing Day' events to promote manufacturing careers. Job shadowing opportunities provide give students a greater 'day in the life' perspective of what is involved in different careers. Youth programs like *Project Lead The Way*¹⁵ and groups like FFA and 4-H play an important role in introducing students to manufacturing and agricultural careers, respectively.

Other methods for bringing the workplace into the classroom include teacher externships, where teachers spend time in actual workplaces. This allows them to better understand how math and science are used in real-world settings so that they can adapt their curricula to help students better understand the applications of the material. In addition, partnering with employers can help create work-based learning opportunities where students engage in meaningful real-world projects as part of their coursework. East Central College is looking to take these efforts even further through their High School-to-Hire program which will—beginning in high school—prepare students for manufacturing careers through a combination of classroom learning and workplace experience.

All of these efforts help students make more informed choices about careers they hope to pursue and what they must do prepare themselves for those careers. It is important to begin career exploration early (e.g., middle school). This allows middle school students to make more informed decisions about the educational path they might elect to take in high school. For instance, students interested in pursuing manufacturing careers benefit from enrolling in Career and Technical Education programs. Students interested in pursuing more middle-skill occupations that require post-secondary education (e.g., nursing, allied health, information technology) can also plan to take advantage of dual credit opportunities that can help save time and money.

Many of these career exploration and work-based learning opportunities emerge from ad hoc interactions between employers and educators. However, expanding these programs and making a

¹⁵ <https://pltw.mst.edu/>

bigger regional impact, will require deeper and more extensive collaboration between K-12 schools, community colleges and employers. Maintaining this relationships can prove challenging as many high school counselors, for instance, have a heavy workload which makes prioritizing these efforts challenging. There are also a number of logistical issues that must be addressed in making these programs successful.



For instance, students must have access to reliable transportation and early dismissals in order to take advantage of these work opportunities.

Given its relationships with the employer community and training and education providers, the Jefferson/Franklin Regional Workforce Consortium can play a vital role in these efforts by serving as a broker to more systematically create these opportunities. Moreover, the Jefferson/Franklin Regional Workforce Consortium could direct some of its funding for youth workforce programs to provide scholarships for the most successful or innovative work-based learning and career exploration programs.

2. Promoting continuing education and career pathways for displaced workers

While there are always displaced workers in need of assistance, the COVID-19 pandemic makes these struggles more immediate and pressing. As noted earlier, the number of unemployed workers in the region increased by over 10,000 between March and May 2020 and unemployment rates are as high as they were during the height of the great recession. Moreover, another 8,250 workers have fallen out of the labor market during that same period. As a result the region faces a profound challenge of getting these workers back to work, and doing so in an environment with a great degree of economic uncertainty.

Continuing education is one tool that can help displaced workers reenter the workforce. It can also help incumbent workers keep their skills current or prepare them to switch careers. For others, this may involve completing degree programs that they never completed. Roughly 1 out every 4 people age 25+ in the region has a high school degree and some college, but has not completed their post-secondary degree. As noted earlier, programs such as Jefferson College's credit for prior learning can reduce the time and cost to adult learners and eliminate redundancy in learning.

The Jefferson/Franklin Regional Workforce Consortium and its partners can promote continuing education in several ways. For instance, they could connect displaced workers that have started but have not completed post-secondary degrees, to the information and resources to help them complete those degrees. This might involve connecting them to counselors at Jefferson College or East Central College. In other instances, this assistance may involve making them aware of programs that provide

financial support. For instance, the Missouri Fast Track program¹⁶ provides grants to adults (age 25+) interested in pursuing certificates, degrees, or industry-recognized credential in a field designated as high need within the state.



Often the time commitment involved in pursuing degree programs is not feasible for many displaced workers. Rather shorter training courses that result in some form of industry-recognized credential is a more appropriate option. Ideally, however, these credentials would not just prepare for jobs but would support their overall career advancement. To this end, the Jefferson/Franklin Regional Workforce Consortium could

promote the use of ‘stackable’ credentials. These kinds of credentials allow workers to progress towards more advanced certifications or an associate’s degree in their field. Missouri’s Workforce Innovation and Opportunities Act (WIOA) state plan encourages Missouri job center staff to promote stackable credential programs, which are often delivered by many community colleges. These stackable credentials are often a better vehicle for non-traditional students—like working adults and parents—to pursue continuing education. These credentials can be found in a wide array of industries from information technology to healthcare to the trades.

The Jefferson/Franklin Regional Workforce Consortium could actively promote these kinds of programs and connect workers to the resources that makes it easier for them to use. However, there are other barriers that can limit access to these programs such as access to public transportation or childcare availability that can also limit their access to continuing education. The Jefferson/Franklin Regional Workforce Consortium could also convene its government and education partners to identify, discuss, and solve these and other barriers.

3. Increasing awareness and usage of existing workforce support programs

Continuing education is also important for employers, as they must keep their workers skills current in order to remain competitive. Providing workers with additional training and advancement opportunities also strengthens their ability to retain their best workers. In an era of tight resources there are limited opportunities to create new programs, so making more effective use of existing programs is one way to expand continuing education throughout the region. Unfortunately, however, many employers—particularly small employers—are unaware of these programs or how to access them.

As a result, the Jefferson/Franklin Regional Workforce Consortium could expand its efforts to promote a number of education and training programs to the region’s employers. This includes:

¹⁶ More information is available at: https://dhewd.mo.gov/initiatives/fast_track.php

- Further utilization of employer services available through the Jefferson/Franklin Regional Workforce Consortium:** The Jefferson/Franklin Regional Workforce Consortium offers a number of employer services including hiring assistance or connecting employers to Welfare-to-Work or Work Opportunity Tax Credits.¹⁷ The Regional Workforce Consortium can also provide Incumbent Worker Training (IWT) funds to help employers retain skilled workers or facilitate layoff aversion. The employers expected contributions to this program varies by size, with employers with 50 or fewer employees contributing 10 percent of the total cost and firms with more than 100 employees contribute 50 percent.
- Continued usage of ACT WorkKeys:** The Jefferson-Franklin region has been a leader within the state in use and promotion of ACT WorkKeys assessments. These assessments test workers on workplace skills such as applied math, writing or finding information. The assessments enable workers to receive a National Career Readiness Certificate (CRC), which in turn provides a clearer signal (relative to a high school degree) to employers about what the worker can do. Employers that prefer or require CRCs, in conjunction with the use of ACT job profiles, are more likely to find workers who better fit with the jobs they need filled.
- Leverage the customized training capacity of area community colleges:** Jefferson College's Business and Workforce Development Center and East Central College's Center for Workforce Development both provide customized training for area employers. These training programs are specifically designed to meet the needs of individual employers and can cover topics such as workplace safety (OSHA), basic IT literacy, or more specialized types of technologies. Contracting out these types of training courses is often a more efficient and effective than having to develop and deliver them in-house. The State of Missouri's One Start program¹⁸ can help offset some of the costs of this training for employers in targeted industries (predominantly manufacturing industries).
- Expand usage of apprenticeships:** Greater use of apprenticeships is another way the region can support continuing education and strengthen career pathways. Apprenticeships allow employers to provide customized training for workers in critical positions. They are also important for worker retention. For workers, apprenticeships allow them to make money while the gain specialized work experience and classroom instruction. Moreover, apprenticeships allow them to earn industry recognized credentials. While apprenticeships are often found in manufacturing, they are not exclusive to manufacturing. The State of Missouri has invested heavily in apprenticeships, in part by shouldering much of the administrative burden often associated with registered apprenticeships.¹⁹

¹⁷ <https://www.jeff-frankjobs.com/services/employer-services>

¹⁸ <https://missourionestart.com/>

¹⁹ Missouri has made significant investments in apprenticeships, as Missouri had almost 15,000 active apprentices in roughly 475 programs in 2019. For more information: https://dhewd.mo.gov/apprenticeship_missouri.php

- **Promote entrepreneurial and small business support services:** Not all workers want to work in a wage and salary job. In some instances, workers may opt to start their own business rather than find a wage and salary job. Regional actors should ensure that entrepreneurs are aware of the counseling services offered by, for instance, the Missouri Small Business Development Center (SBDC). SBDC counselors can help these aspiring entrepreneurs learn how to start a business, or perhaps more importantly whether to start a business. In many instances, the training that small businesses and entrepreneurs need relates more to basic business skills (e.g., implementing marketing strategies, identifying financial resources, properly pricing goods and services, etc.) than some kind of technical subject matter. Missouri Enterprise also provides business services and training to small and medium sized manufacturers.

The areas for moving forward laid out above all involve the Jefferson/Franklin Regional Workforce Consortium to expand its capacity to fill several key roles. These roles include:

- **Promoter:** As noted above, there are many existing programs designed to help workers get the education and career support they need and to assist employers meet their hiring and training challenges. Given the Jefferson/Franklin Regional Workforce Consortium's role as an intermediary between those two groups more extensively promoting these programs should continue to be an area of emphasis moving forward, particularly during a period of limited resources. This promotion should also be active in nature. This means ensuring that employers or workers are not just aware of available programs and resources, but actively connected to the people who are best positioned to help them take advantage of these programs.
- **Convener:** The Jefferson/Franklin Regional Workforce Consortium is well positioned to serve as a regional convener for discussing key workforce issues, through its current set of activities and the membership of the regional workforce investment board. While already one of the region's leading organizations for discussing workforce issues generally, the consortium could use its connections to government, education, and the private sector to discuss more specific regional challenges (e.g., public transportation challenges in different parts of the region). The ability to bring the right people to the table is an important step toward addressing regional challenges.
- **Investor:** Using its WIOA funding, the Jefferson/Franklin Regional Workforce Consortium can support innovative programs that target specific issues or challenges. For instance, this might involve providing scholarships for programs like East Central College's High School-to-Hire program that helps students move into manufacturing careers. It could also provide financial support for adults that want to return to one of the region's community colleges to complete a degree they were previously unable to finish. Given funding limitations, the Consortium should not be viewed as the sole source of funding but rather as seed funding for innovative programs, or complementary funding to expand the impact of existing efforts.

The region faces profound short-term and a number of ongoing longer-term challenges. The steps laid out above can help the Jefferson/Franklin Regional Workforce Consortium, in collaboration with its partners, more systematically address many of these challenges.