



PASCO EDC
NORTH TAMPA BAY, FLORIDA

2020 WORKFORCE REPORT

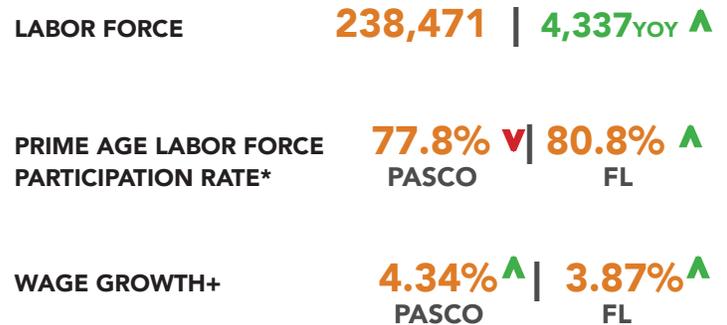
A Pasco EDC Publication

The WorkforceCONNECT annual report aggregates economic data from September 2019 to August 2020. This year's report was shaping up to show historically low unemployment, steady wage increases and describe a workforce that is more educated, younger and more skilled than any time in recent history. Then the sudden onset of COVID-19 changed everything. Local unemployment shot up to 13.8%, higher than what was seen during the great recession, all schools went remote after a multi-week break. Restaurants and retail were forced to shut down for weeks. This shock will have long term effects on our local labor market, some effects will be permanent and uncertainty is the prevailing sentiment among businesses as they try to reopen, restructure and begin to hire again.



LABOR MARKET OVERVIEW

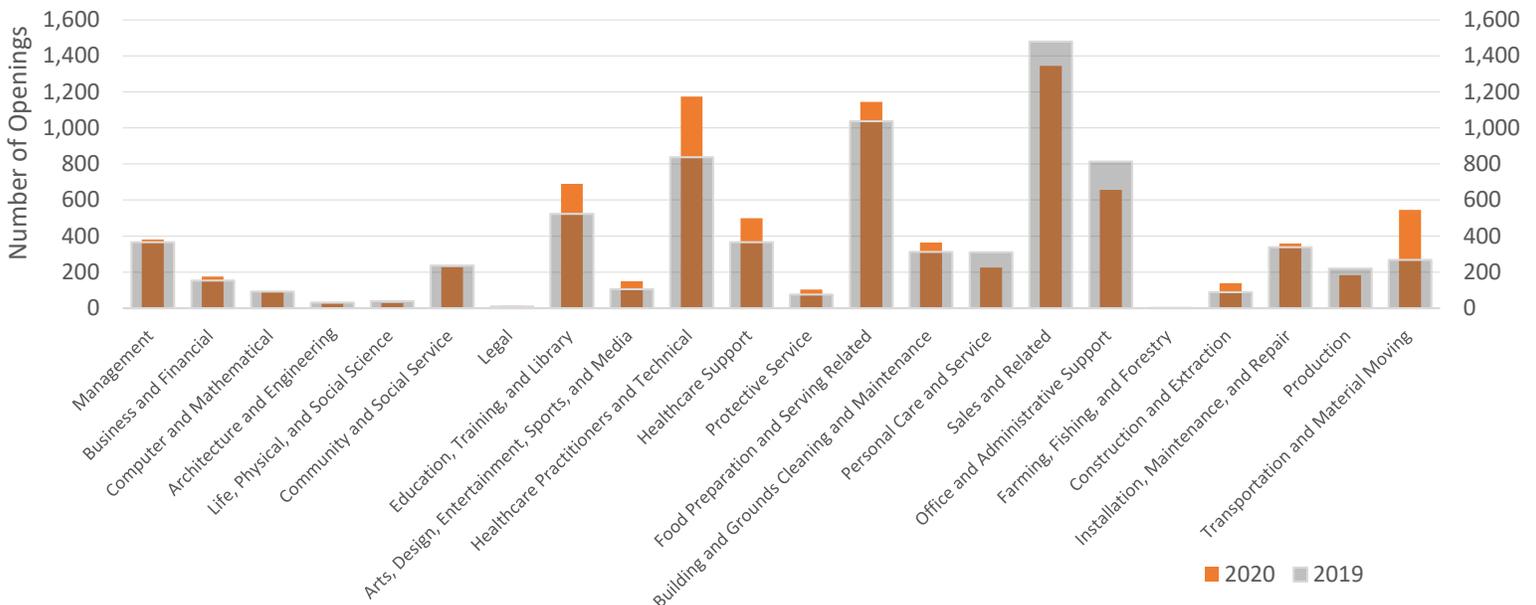
Source: FL DOE Aug. 19-20 non-seasonally adjusted



*American Community Survey 2018, +Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research April 2019

JOB OPENINGS BY INDUSTRY

Source: Jobs EQ Aug. 19-20



ANNUAL SURVEY RESULTS

INDUSTRY MIX

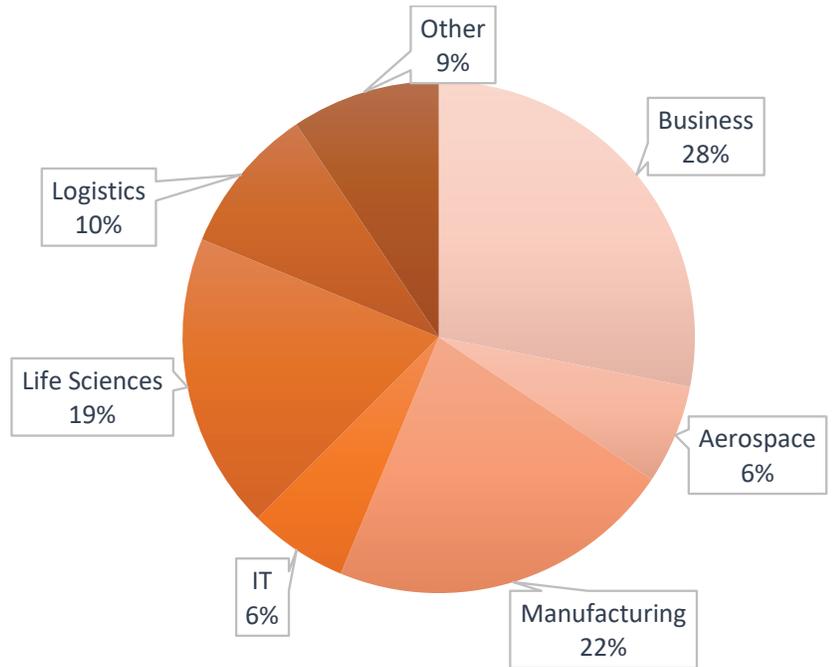


SURVEYS DISTRIBUTED 783

RESPONSES RECEIVED 36

HIRING CLIMATE

The businesses who offered data to support this year's Workforce Report represented some of the largest employers in the county. Combined they employ thousands of workers across all of our major industry sectors. From public institutions to multinational firms to non-profit organizations all are growing in Pasco and their insights into our region's workforce will help shape its future.



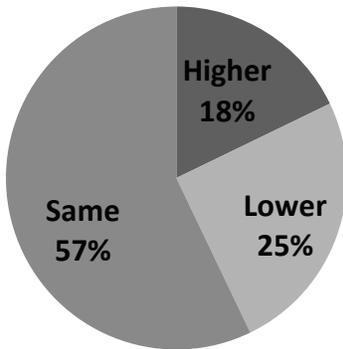
Do you have a need to hire employees that have an industry recognized credential/license?

YES 33%
NO 67%

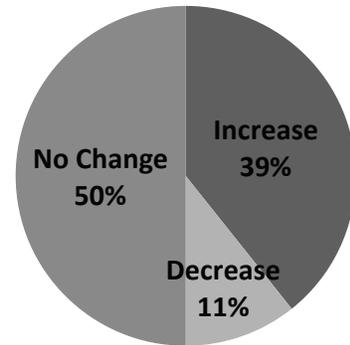
Do you have difficulty recruiting employees?

YES 64%
NO 36%

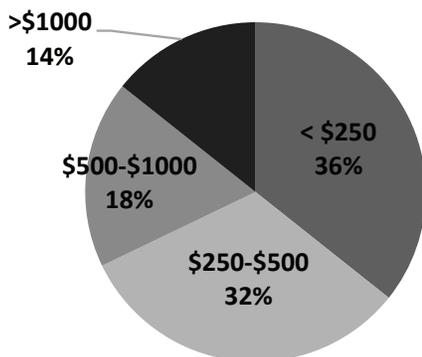
Is the number of employees compared to last year?



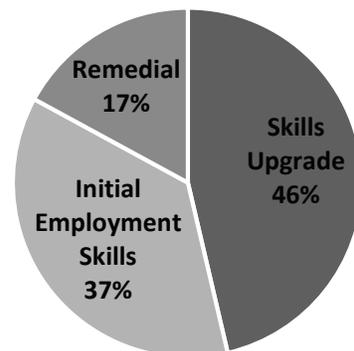
What employment changes do you anticipate this year?



How much do you invest annually per employee in training/skills development?

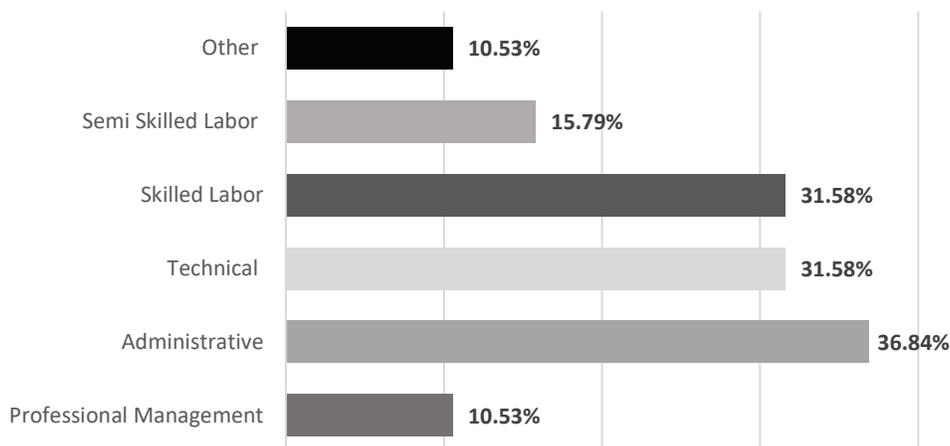


What type of employee training do you invest in annually?



EMPLOYEE RECRUITMENT

Which of the following skilled categories do you have difficulty recruiting employees?



TRAINING & ECONOMIC DEVELOPMENT ASSISTANCE

Businesses were asked to respond to the familiarity and use of training and economic development assistance programs in Pasco County. The results are shown below:

Programs	Familiar With	Have Used	Unfamiliar With
American Manufacturing Skills Initiative (AmSkills)	13.79%	3.45%	79.31%
CareerSource Pasco Hernando Job Placement Services	41.38%	20.69%	34.48%
CareerSource Pasco Hernando On-the-Job Training (OJT)	34.48%	10.34%	48.28%
CareerSource Pasco Hernando Employed Working Training	24.14%	3.45%	62.07%
CareerSource Florida FL FLEX Training Grant	13.79%	0.00%	75.86%
CareerSource Florida Incumbent Worker Training Grant	17.24%	0.00%	75.86%
Florida DEO Work Opportunity Tax Credit Program	31.03%	0.00%	58.62%
Florida Job Creation Incentive Programs	24.14%	0.00%	65.52%
Florida Ready-to-Work Credential Program	17.24%	0.00%	79.31%
James Irvin Education Center	17.24%	0.00%	82.76%
Marchman Technical College	41.38%	0.00%	48.28%
Pasco County Job Creation Incentive Programs	17.24%	0.00%	72.41%
Pasco District Schools Certified Career Academies	20.69%	0.00%	72.41%
Pasco-Hernando State College Career and Technical Training	44.83%	0.00%	48.28%

RATING OF CURRENT WORKFORCE

How do you rate workers with respect to the following items?

3.2/5 AVAILABILITY	3/5 QUALITY	3/5 STABILITY	2.5/5 PRODUCTIVITY
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How would you rate your employees with respect to certain skills?

- C+** Basic Writing/Math/Reading
- C** Computer/Technology
- B-** OSHA/Safety
- C** Supervisory/Development
- C** Communication
- C** Customer Service
- B** Mechanical/Technical

COVID-19 SURVEY RESULTS



COVID-19 SURVEY RESPONSES

COVID-19 BUSINESS IMPACT SURVEY MARCH 2020 - 28 RESPONSES

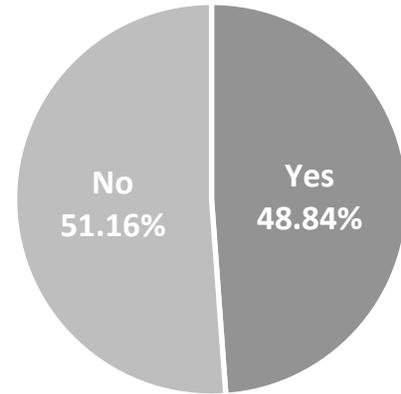
How are you keeping up employee morale and spirit for employees unable to get to their usual place of work?

- Find work for all employees
- Positive attitudes and confidence
- Phone calls, words of encouragement and webinars
- Working from home
- Open communication
- Send them encouraging texts and emails, ask about family, keep lines of communication open

COVID-19 BUSINESS IMPACT SURVEY MARCH 2020 - 43 RESPONSES

4

Does your business expect to layoff or furlough workers due to the COVID-19 Pandemic?



- One-on-one phone calls regularly
- Reaching out weekly
- Discussing furlough vs layoff
- Continuing payroll
- Staying positive and reassuring staff there are plans in place to keep them employed and get the company through the crisis

REFOCUS VIRTUAL WORKSHOPS

“Being together with other entrepreneurs during the COVID crisis gave me a feeling of relief that we are all in this together and we will come out of this crisis. I took away some great tips on addressing client needs and how to start an open-ended line of communication with my customers to address current problems. Hopefully, it lasts longer than just the next hour but I feel a new spark.”

-Gretchen Frapwell, Salon Snob

COVID-19 ASSESSMENT SURVEY APRIL 2020 - 377 RESPONSES

What was the reason for your business closing?

- 11.11% Workforce Retention

Do you plan to reopen your business after the crisis has ended?

- 74.47% Yes

Employee Distribution



Number of Employees

■ 1 - 10 ■ 11 - 50 ■ 51-100 ■ >100

To better understand the results of the mailed survey, 50 human resource managers representing diverse industries with the greatest economic impact across the county were invited to engage in a candid discussion about workforce challenges and opportunities. Of the companies invited, 27 companies attended the focus group and answered the following questions.

1) What challenges are you facing in retaining and recruiting employees during past 6 months?

The second and third quarters of 2020 were those hardest hit by the pandemic. Many of our employers had to face the decisions to furlough and/or layoff parts of their workforces in order to keep their companies afloat and that was a monumental shift compared to the first quarter of 2020 which saw record low unemployment. As these companies began to invite their employees back many faced a new obstacle of competing with the state with regard to wages. Many entry-level and blue-collar workers were making more money on unemployment than they would have returning to work. This added competition has slowed the recovery of jobs for some of our employers. Now that those benefits have been reduced, we hope to see the employment recovery pickup.

2) What are we currently doing right in the community to address workforce needs and what should we continue to do to ensure a continuous pipeline of talent?

Soft skill development has been notable in entry-level positions. Pasco Schools has done a great job in instilling many of these essential job-skills such as communication, organization, and time management, which the employers appreciate and continue to encourage. Also, the growing number of workers with industry recognized credentials helps employers better assess a job seekers ability, however, the employers still weight experience over credentials when it came to many trade positions.

3) Where are you recruiting from? Are you finding your workforce from within the county, the region or are you having to recruit from across the country? What role, if any, is the work-from-home model having on your recruitment efforts?

Our employers that require professional experience are seeing benefits and negatives to the current workforce landscape. The benefits being that for many who are able to transition their open positions to a work-from-home model are able to expand their candidate search to include regional talent whereas before they had to look local. On the other side, employees are beginning to expect and demand these remote positions and recruiting for in-person only positions has become more difficult. This is forcing employers to innovate and adapt to ensure both the employer and employees are establishing a balance between productivity and safety.

4) What motivators are you seeing as retainer or recruitment tools? Are they wages, benefit packages, shifts in company culture, etc.?

The difference continue to follow previous years responses to a generational divide when it relates to motivators to recruitment and retainment efforts. Millennial workers look for corporate responsibility and the big picture consequences of their work. They also value clear professional development plans and avenues for advancement. This generation divide is also seen in median tenure for workers. Those aged 65 and over see a median tenure of 10.3 years according to a 2018 survey by the Bureau of Labor Statistics, whereas the same number for 25-34-year-olds was only 3.2 years. This highlights the willingness of younger workers to change jobs if they aren't satisfied with their roles within the company or with the company's direction as a whole.

5) Investing in employee training can prove to be an important tool for retaining and upskilling your current workforce. What training would be most beneficial to you and your workforce? (e.g. OSHA Certifications, Technical Certifications, CDL, Other Industry Recognized Certifications)

The same certificates that were in-demand last year continue to be: Basic Life Support, CPR, OSHA and technical skill training. The conversation branched off this year to career exploration opportunities and exposing younger children to industry training and experiences. Soft skills as mentioned above are especially important for entry-level positions and apprenticeships continue to have their place in manufacturing and professional services such as HVAC and electrical occupations.

ACHIEVEMENT

Census Bureau American Community Survey 2019

BACHELOR'S DEGREE OR HIGHER 25.4% PASCO | 29.7% FL



ASSOCIATE'S DEGREE 12.2% PASCO | 11% FL



HIGH SCHOOL OR LESS 40.4% PASCO | 39% FL



FL PASCO

KEY INDICATORS

Census Bureau American Community Survey 2019

DISCONNECTED YOUTH 5.9% PASCO ▲ | 3.1% FL ▲

3 AND 4 YEAR OLDS ENROLLED IN SCHOOL 48.6% PASCO ▲ | 53.1% FL ▲

HIGH SCHOOL GRADUATION RATE 88.3% PASCO ▲ | 86.9% FL ▲

TOP 10 EDUCATION PROGRAMS

AWARDS

Liberal Arts and Sciences/Liberal Studies	1902
Business Administration and Management	1289
Criminal Justice/Safety Studies	699
Psychology, General	286
Registered Nursing/Registered Nurse	242
Business Administration, Management & Operations	167
Emergency Medical Technology/Technician	149
Social Work	139
Accounting	136
Human Services	100

Source: JobsEQ, 2018-2019 academic year

AWARDS GAPS

Current surpluses and shortages in awards represent the difference in estimated regional demand for specific occupations versus the number of post-secondary certificates and degrees earned for specific occupations. This metric allows us to identify industries in which we have a competitive advantage in talent and areas in which we need to bolster our training efforts to meet demand. Source: Jobs EQ August 2019-2020

Largest Awards Shortages by Occupation



Largest Awards Surplus by Occupation