April - 23 - 2019

Sonoma County Economic Development Board

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Spring "Future of Work" Conference

April 26th, 2019

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Strategic Sonoma Progress

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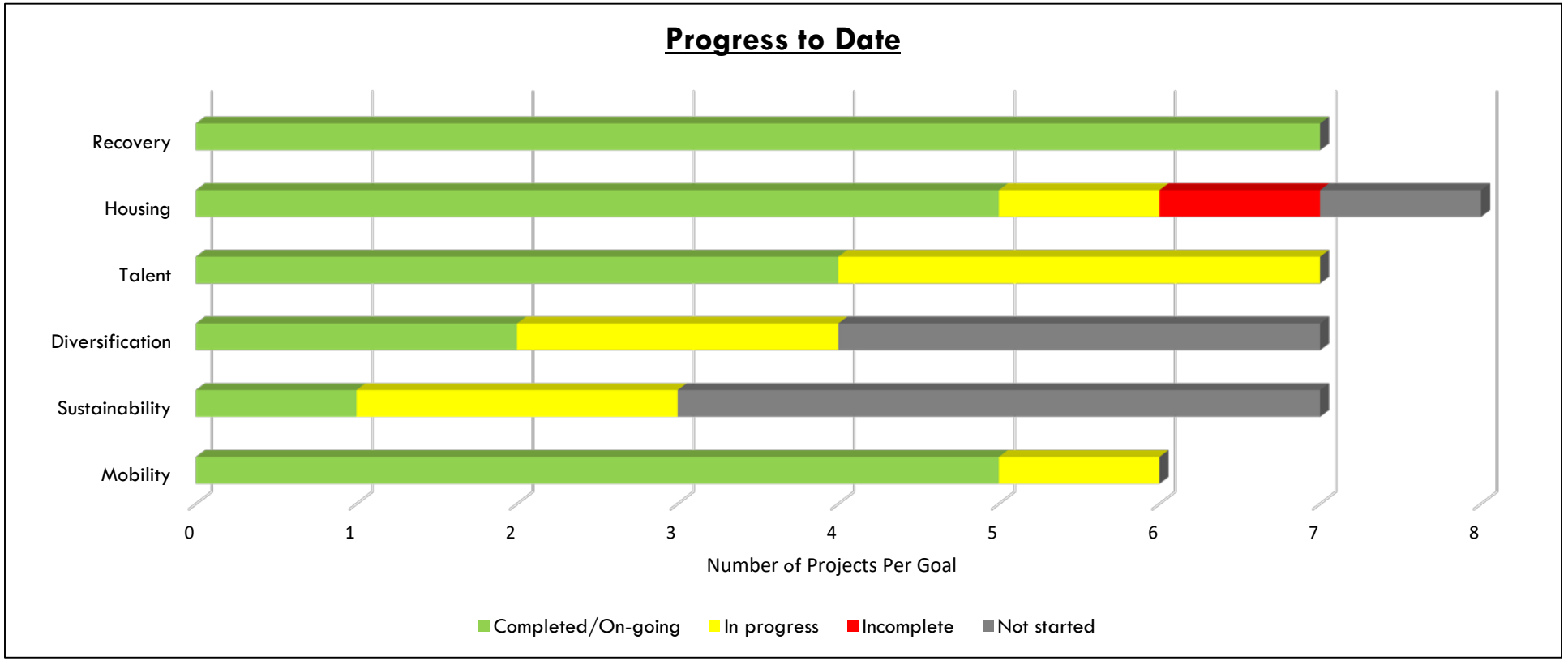
SONOMA COUNTY EDB ECONOMIC DEVELOPMENT BOARD



Employer Housing Council

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SONOMA COUNTY ECONOMIC DEVELOPMENT BOARD EDB

STRATEGIC SONOMA

SANTA ROSA METROCHAMBER

- **15** of the County's **major employers**
- Soliciting **capital investment**, participating financially to **stimulate development**, and **supporting outreach**
- Launching a **Housing Trust** to invest in housing projects

Manufacturing and Tech Alliance

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Workforce Gap

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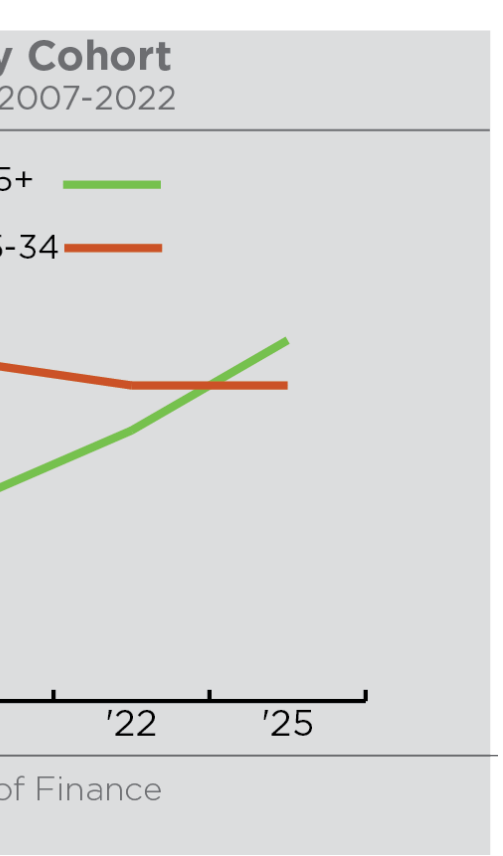

7 working age people for every 1 retiree in 2007

Today, only **3.5** working age people per retiree

Sonoma County Connections

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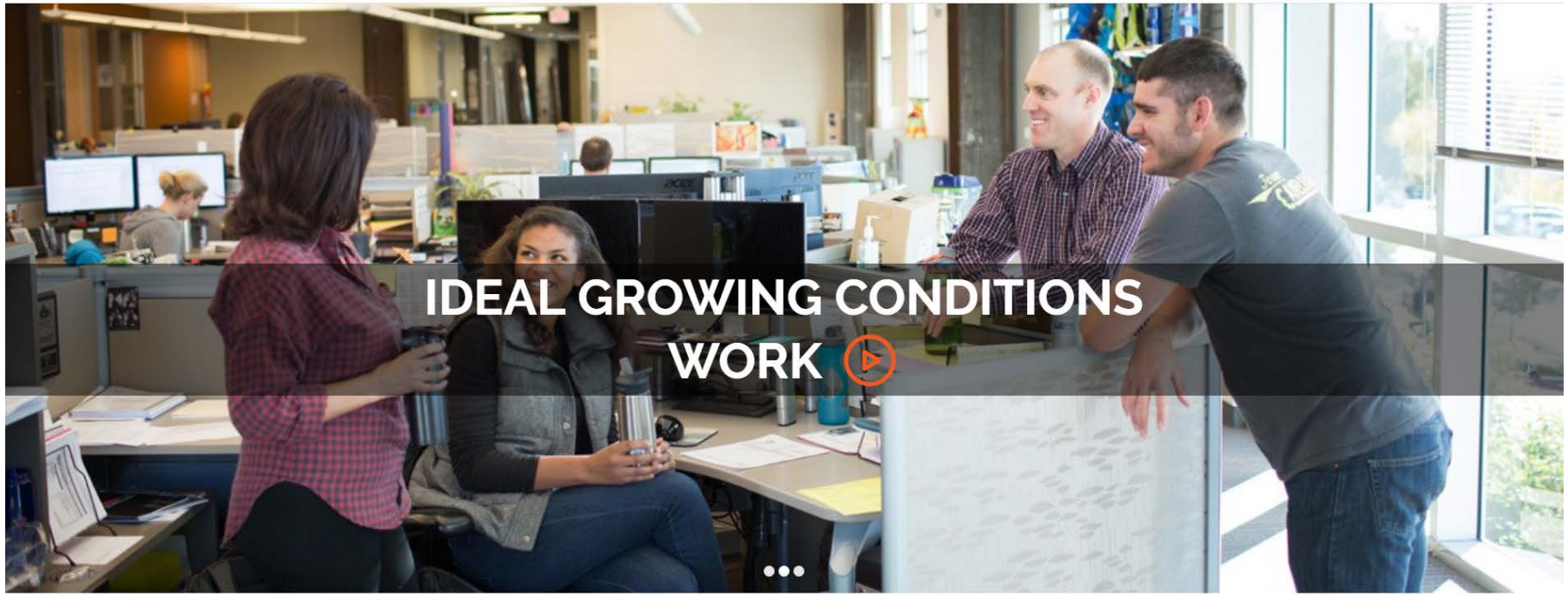
sonoma county connections

LIVE WORK PLAY CITIES STORIES



Sonoma County Connections was created to showcase what makes this county such an inspiring place to grow, both personally and professionally. By introducing you to people who live and work here. By serving up all the information you need to make an informed choice about living and working here. By connecting you to all the exciting and emerging business opportunities in the County.

Talent Alignment Council

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- Key Employer/Educator Partners:
  - 8 employers from 6 Strategic Sonoma target industries
  - SSU, SRJC, and Empire College
  - Workforce Investment Board and CTE Foundation
- Focused on retaining talent in the county

Education Report Card

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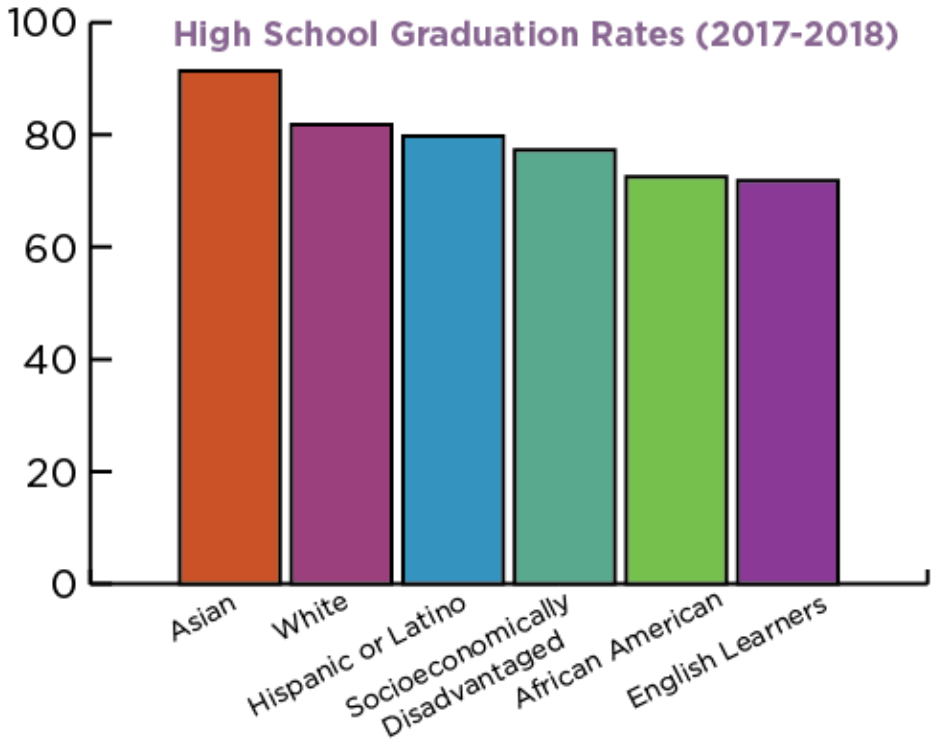
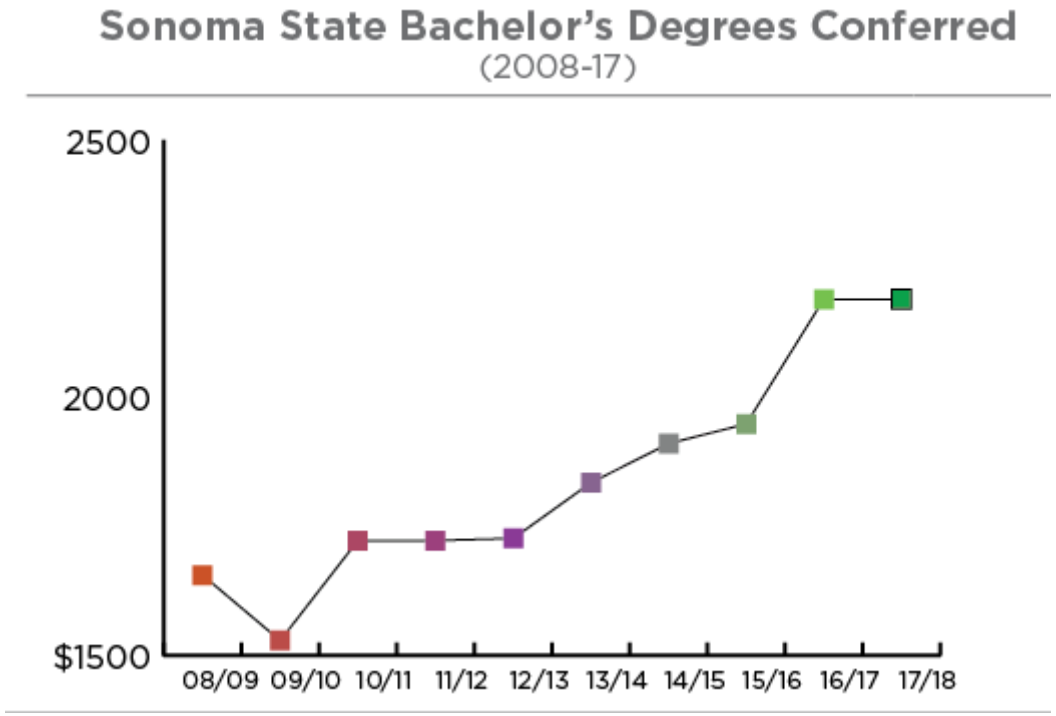
SONOMA COUNTY EDB ECONOMIC DEVELOPMENT BOARD

The **ethnicity gap** of high school graduation rates between White and Hispanic or Latino students is now 2%, **down from ~7%** between 2014-2017, with the gap between White and African American **decreasing by 7%**





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Best Practices

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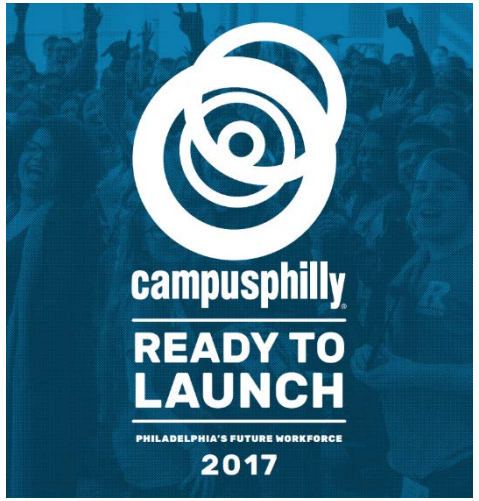

- Talent Forecast Report
- Holiday Job Fair
- Summer Internship Mixer

Launch Sonoma

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Supervisor David Rabbitt

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Introducing
Dr. Micah Weinberg

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The Present and Future of the Sonoma County Economy

April 2019

BAY AREA COUNCIL ECONOMIC INSTITUTE

A Profile of Sonoma on the 2nd Anniversary of the Fires

Building on work with its knowledge partners on analysis and technical assistance, the Institute will publish the Profile in November 2019. This will build on previous work such as the Portrait of Sonoma.

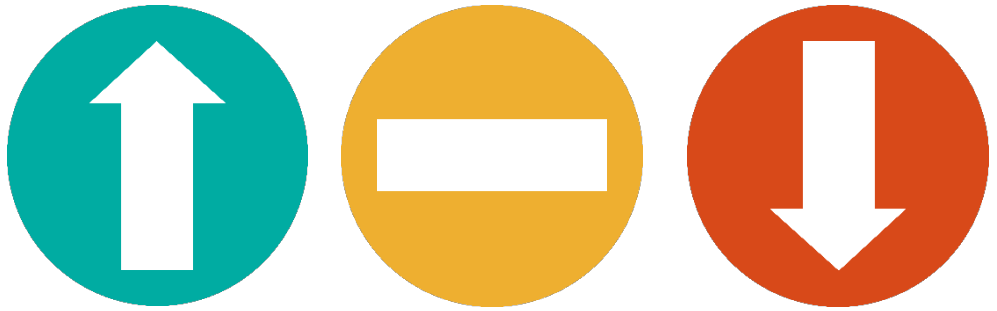
To provide clear measurement of progress on public priorities, the Profile will adopt similar focus areas as outlined in the original *Profile of Sonoma* and the County's *Recovery & Resiliency Framework*:

- Housing
- Economy
- Health and Safety Net Services
- Natural Resources
- Community Preparedness

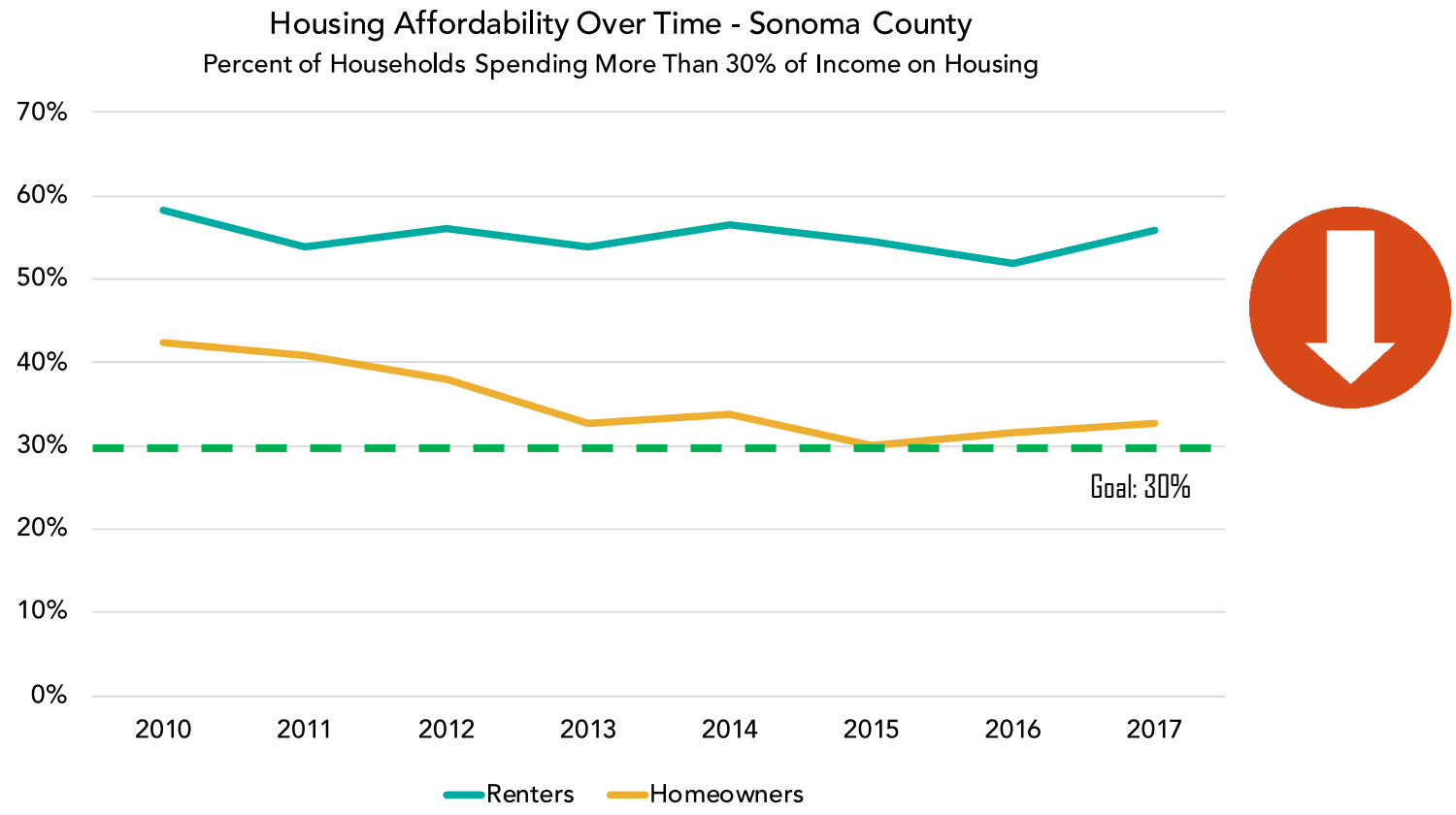
Indicators, Goals, and Policy Recommendations

The project will present a series of key indicators and indices across a range of different areas.

- Point estimates and progress on these measures will be evaluated relative to goal;
- Policy recommendations will be directly tied to likelihood of achieving or moving further way from these goals;
- These recommendations will be vetted by key stakeholders through public and private meetings from May to July 2019;
- Final form of the product or products to be determined (e.g., policy recommendations may be issued independent of indicator set).



Housing: Affordability Over Time

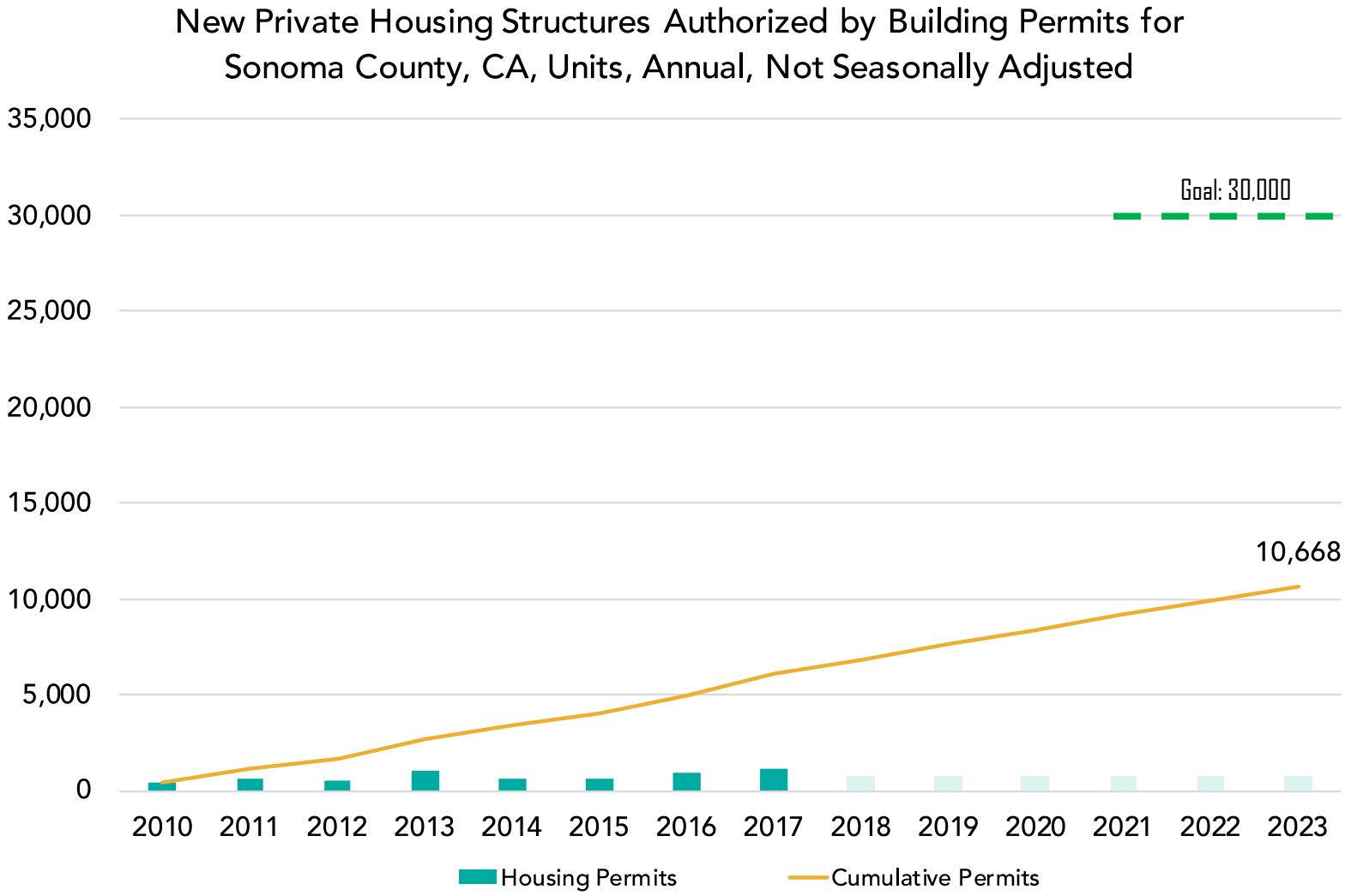


Source: U.S. Census Bureau, American Community Survey
Analysis: Bay Area Council Economic Institute

Plus (+) – JPA Incentivizes production of housing that matches community need

Minus (-) – Rolling back of streamlined permitting processes

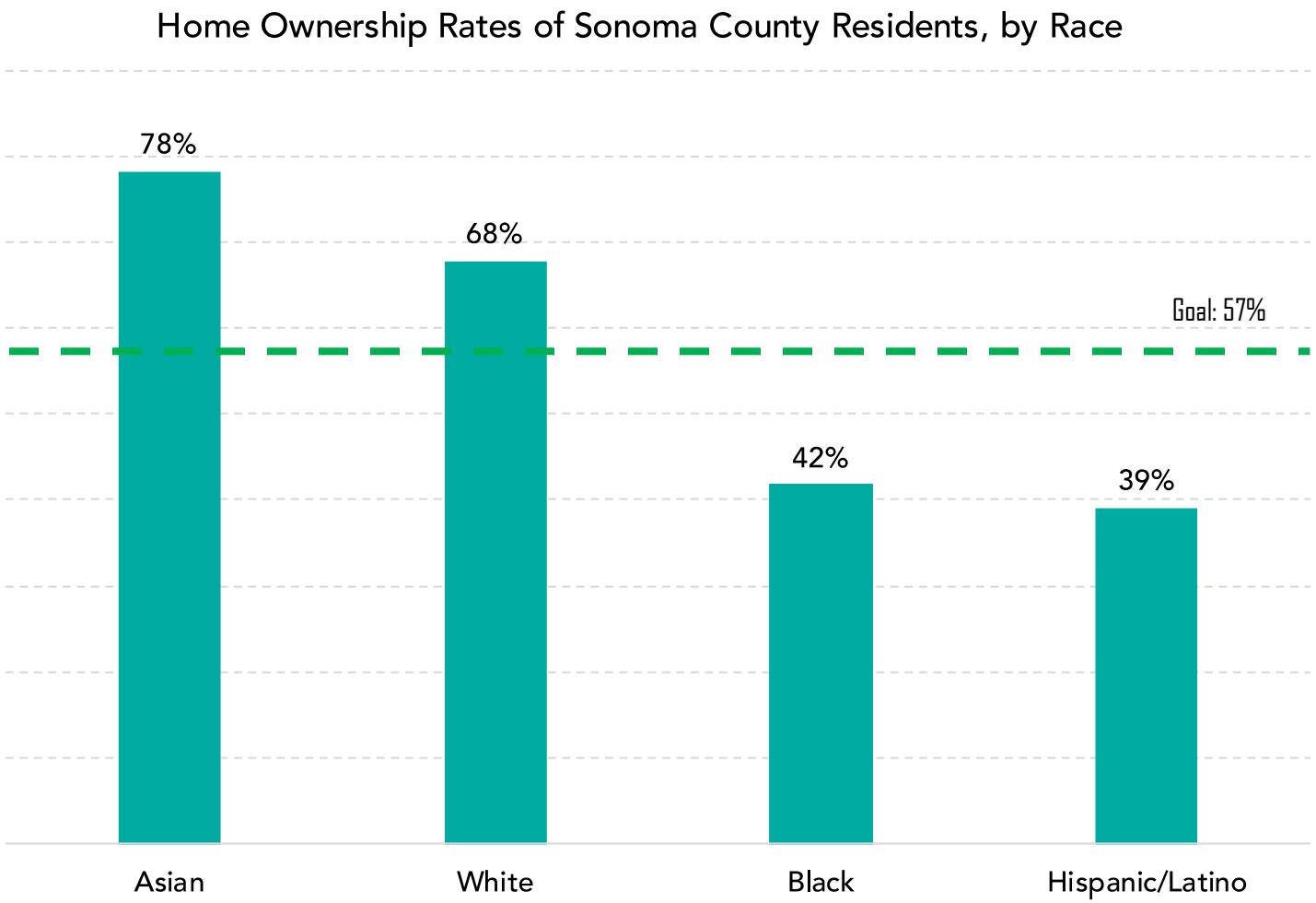
Housing: Production



Source: U.S. Census Bureau, American Community Survey

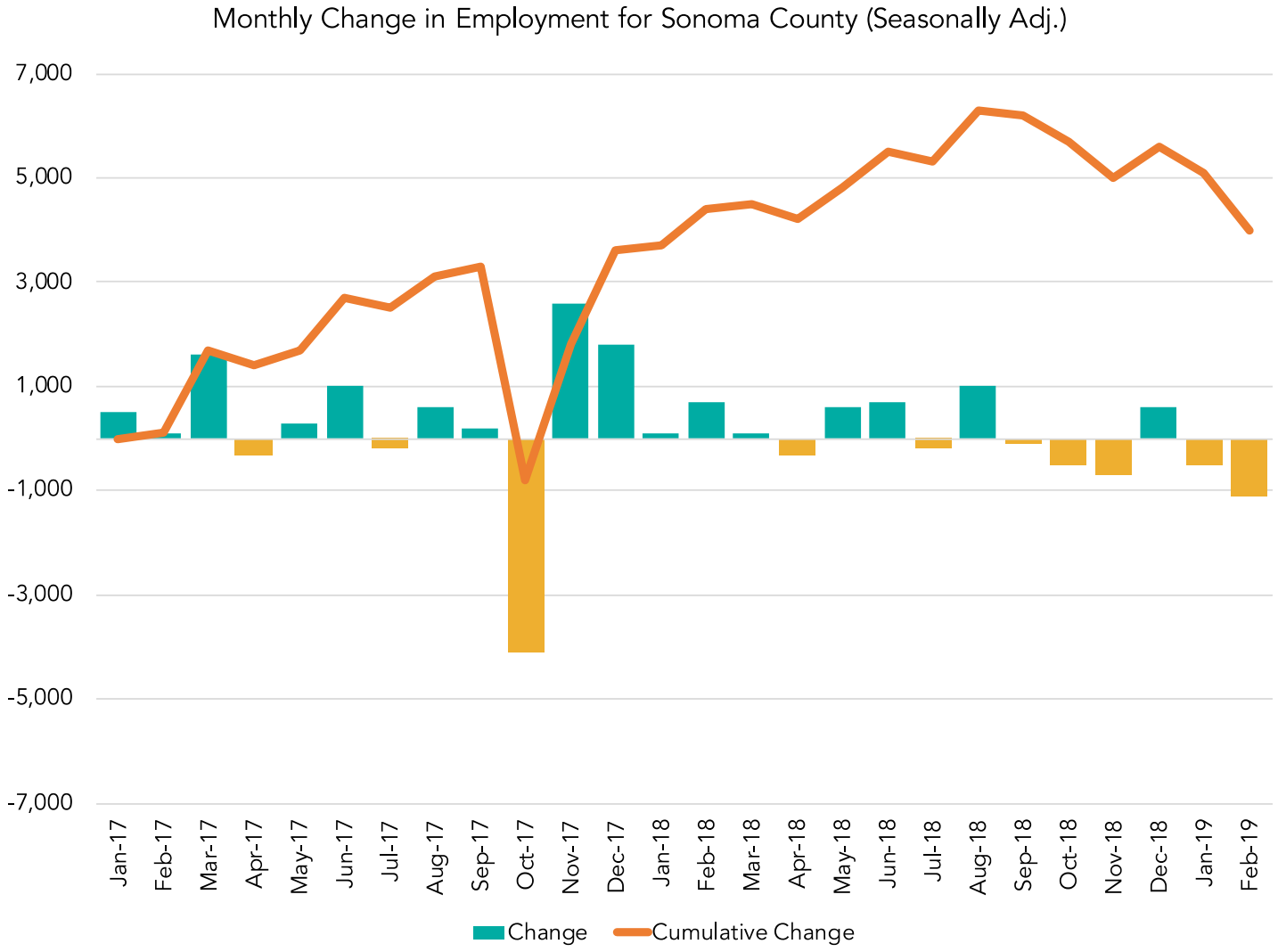
Analysis: Bay Area Council Economic Institute; Note: From 2018-2023, we used the average number of permits from 2010-2017 (762 units annually)

Housing: Home Ownership by Race



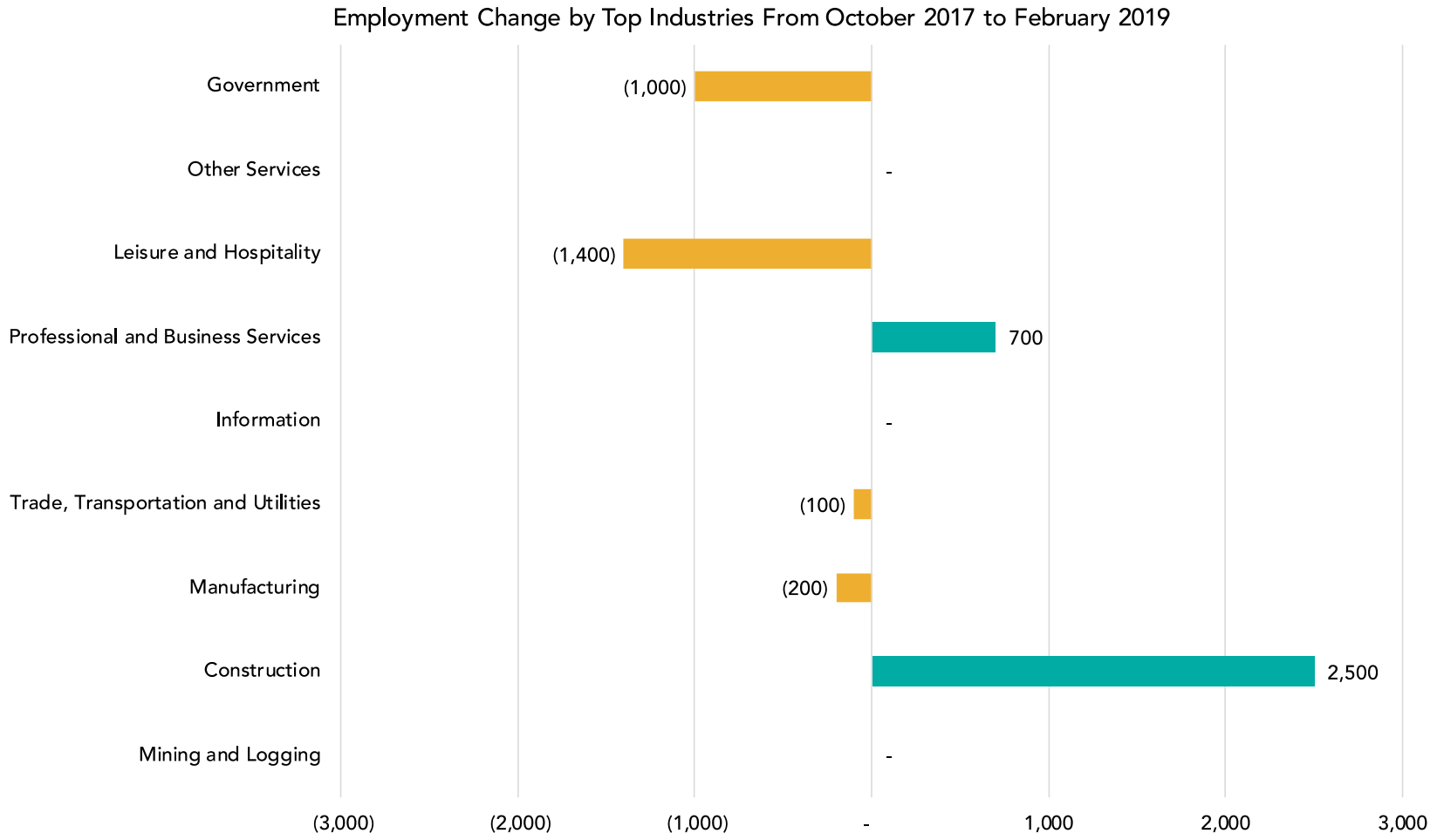
Source: U.S. Census Bureau, American Community Survey (2018)
Analysis: Bay Area Council Economic Institute

Economy: Tracking Employment



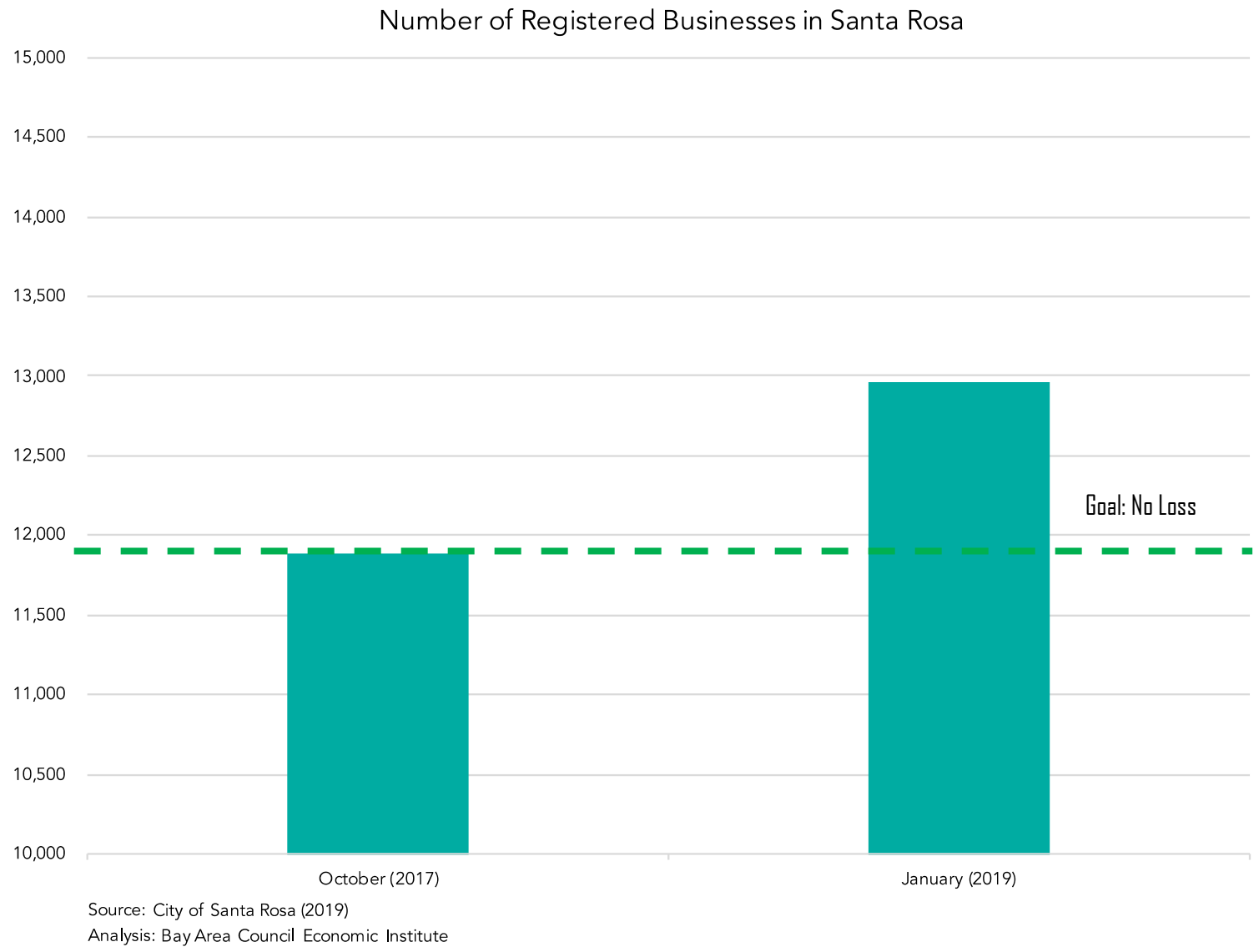
Source: California Emplyment Development Department
Analysis: Bay Area Council Economic Institute

Economy: Industry Employment



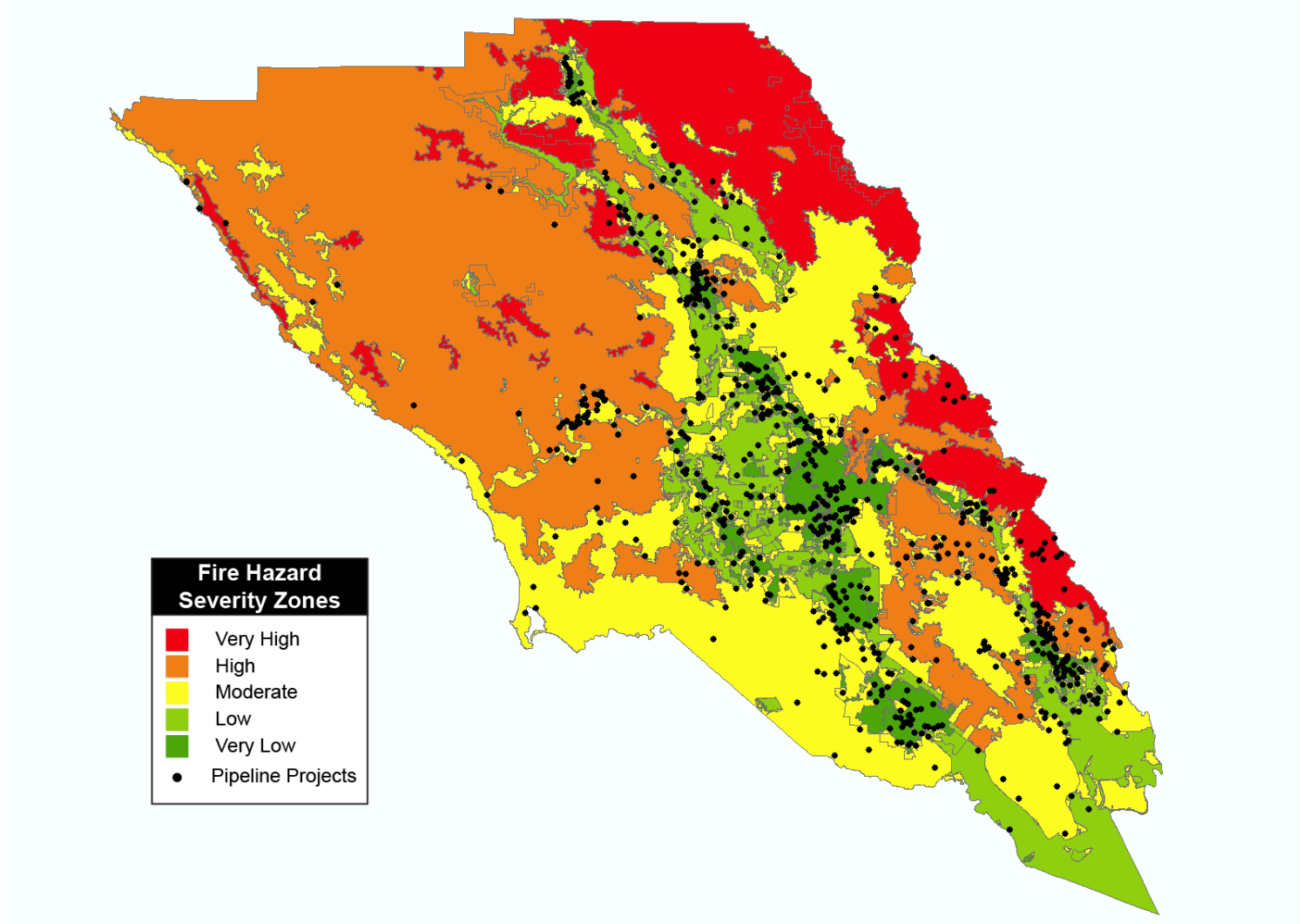
Source: California Emplyment Development Department
Analysis: Bay Area Council Economic Institute

Economy: Business Dynamics

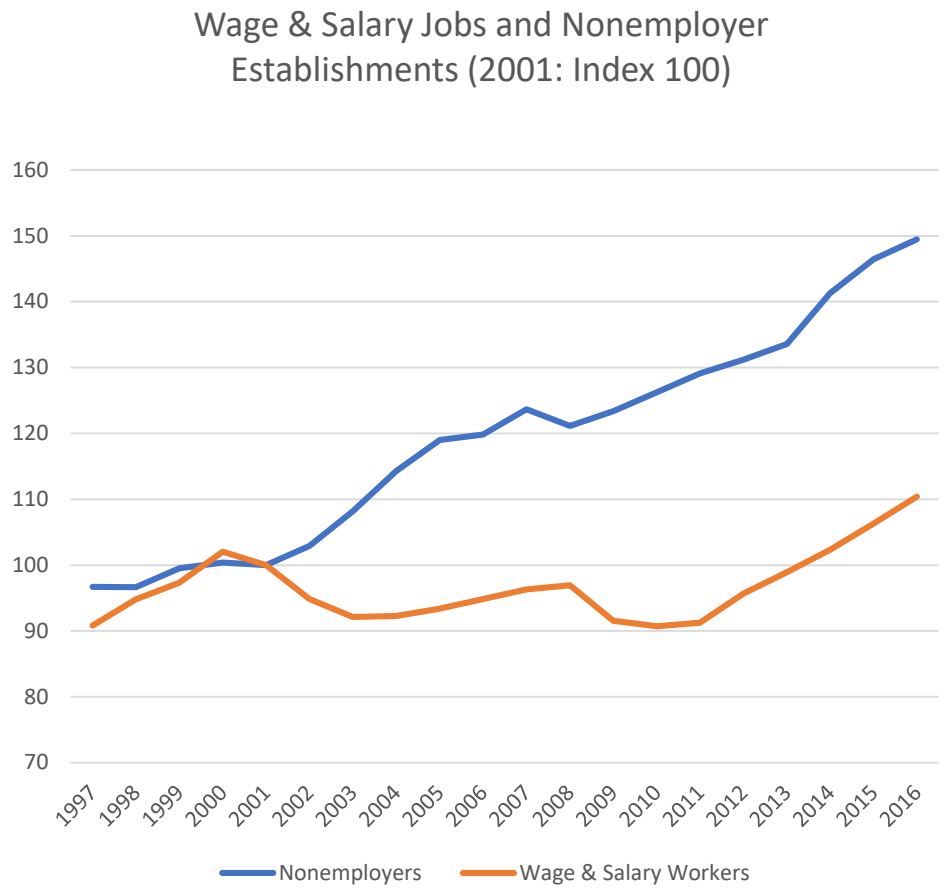


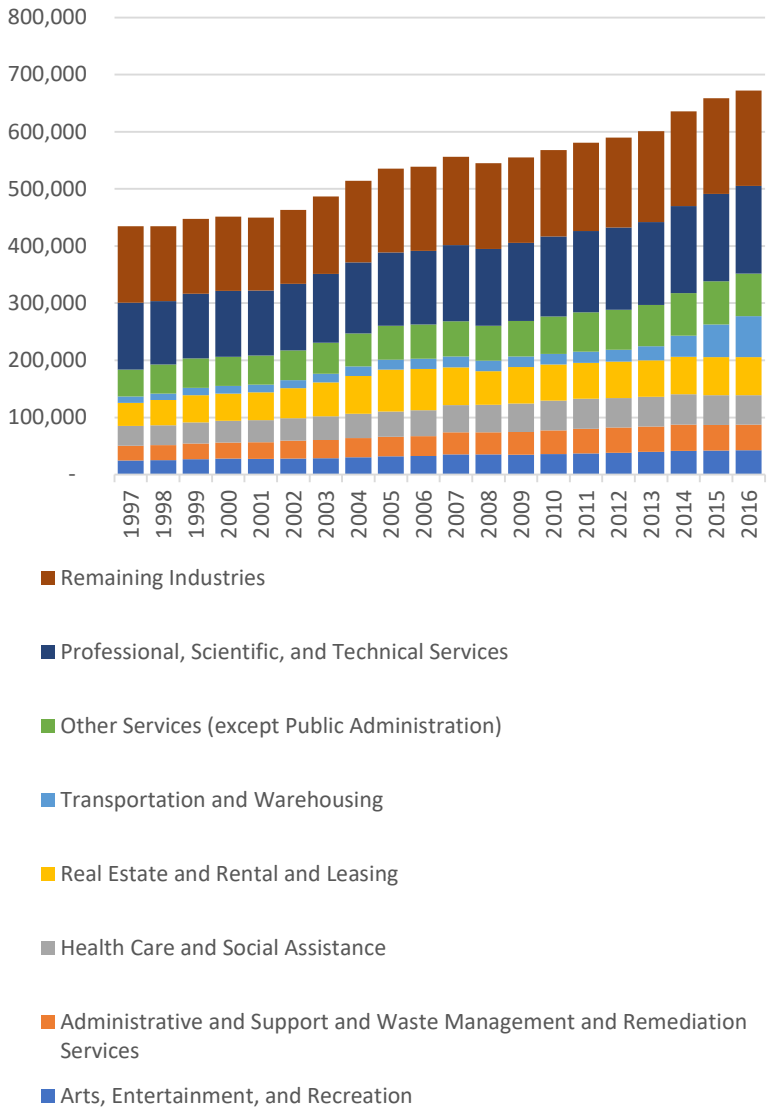
Source: City of Santa Rosa (2019)
Analysis: Bay Area Council Economic Institute

Natural Resources: Housing in the WUI



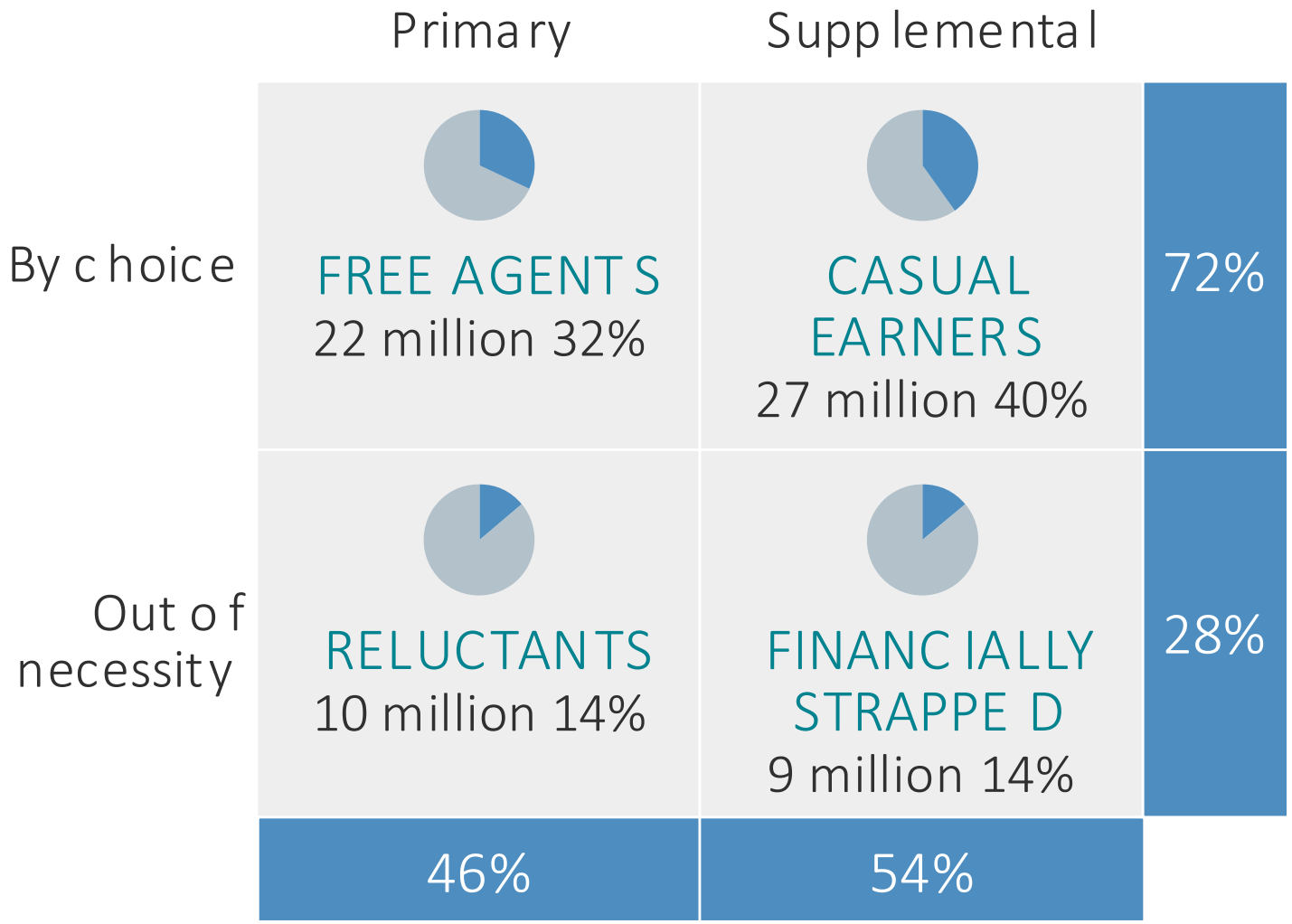
Bay Area: Alternate Arrangements Outpaced Wage + Salary Emp





What Do We Know About Independent Workers?

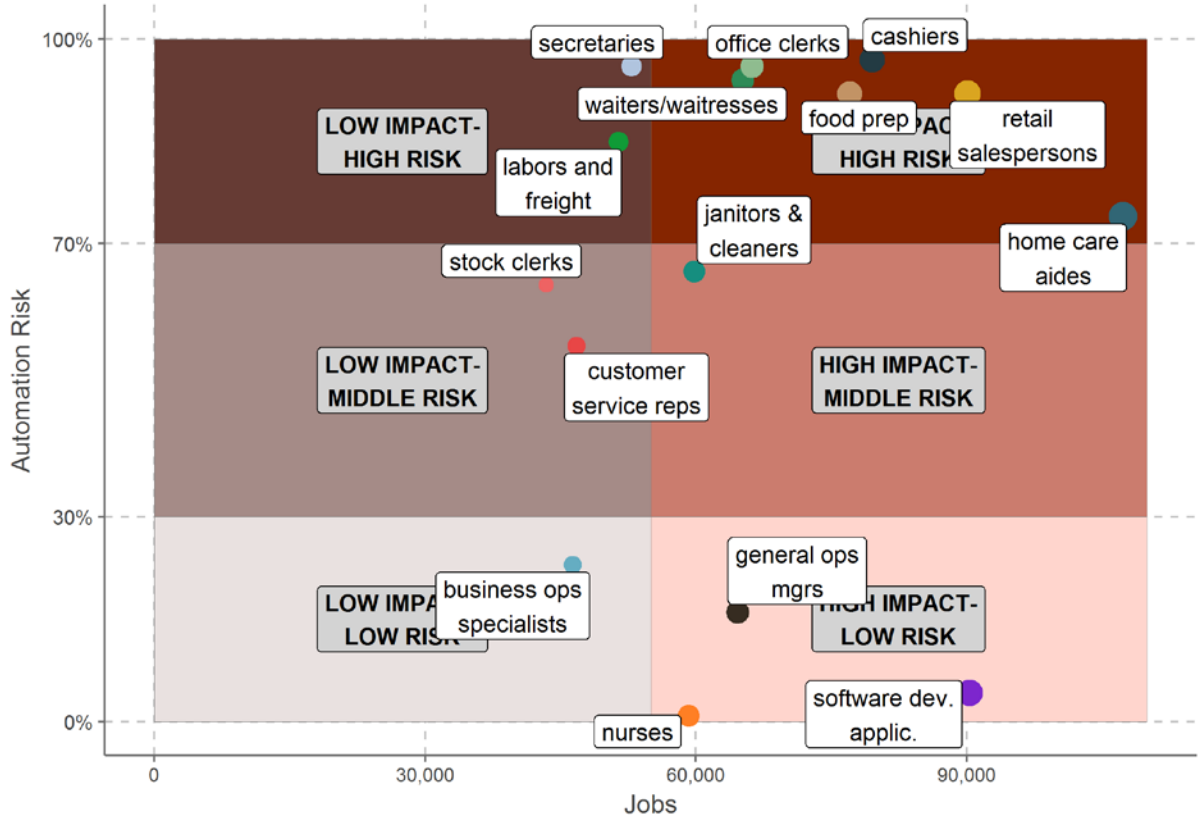
- Just under half of all "gig economy" workers are relying on this work as their **primary source of income**.
- **"Casual earners"** are the largest demographic, accounting for 4 in 10 workers.



Source: US data, Manyika et al. (2016)

Top 20 Bay Area Occupations Most at Risk of Automation

- Top 20 occupations: ~1m workers
- Frey / Osborne (2017) data on automation risk
- High risk band: typically entry level jobs
- Low risk band: typically professionals

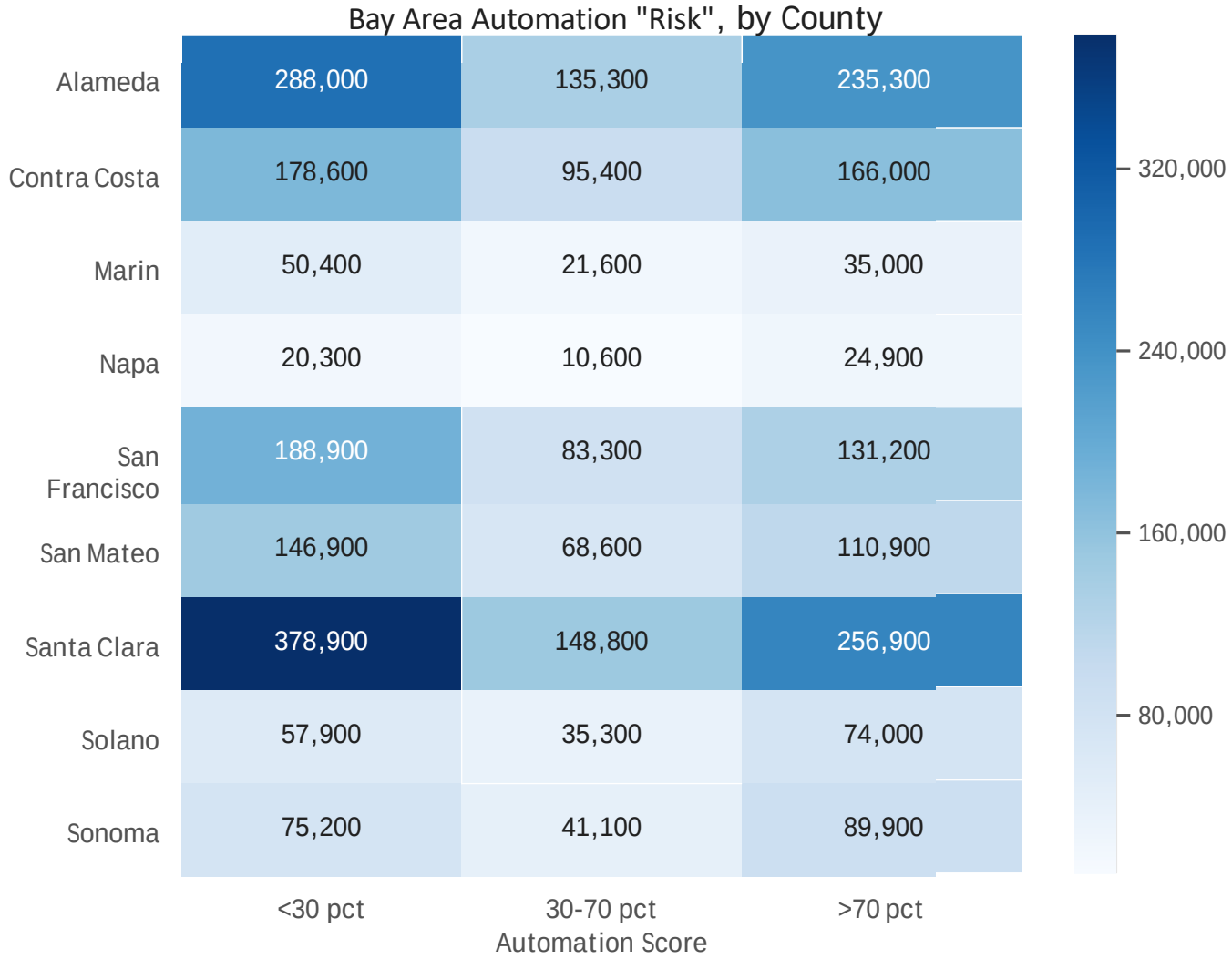


Automation data from Frey & Osborne (2017). Employment data from BLS OES, Bay Area MSAs.
*F&B asked: "Can the tasks of this job be **sufficiently specified**, conditional on the availability of big data, to be performed by state of the art computer-controlled equipment"*

County Comparisons: Sonoma Relatively High Automation Risk

Which areas are most at risk?

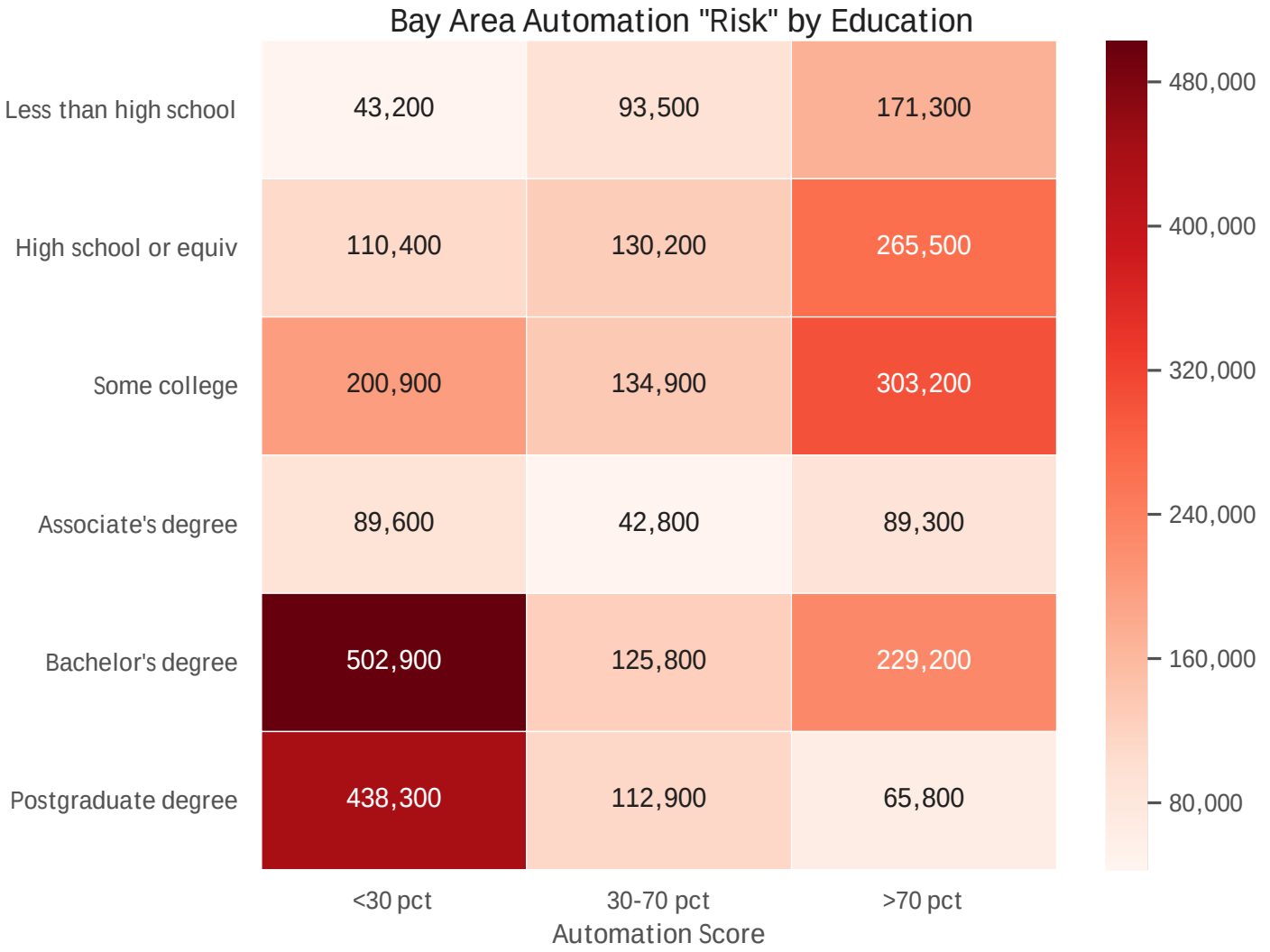
- High costs may spur faster automation of some tasks
- Strategic development functions and skills highly concentrated here-likely to continue, even increase
- North Bay Counties more workers in high risk category, South Bay, West Bay



Source: Automation Data From Frey & Osborne 2017; Demographic Data From US Census ACS PUMS 2015-2017

Bay Area Automation Risk by Level of Education

- Brookings: Bay Area to be at less-than average risk, citing high levels of education



Source: Automation Data From Frey & Osborne 2017; Demographic Data From US Census ACS PUMS 2015-2017

THINK
सोचिए
$24,000
Who is Stoker?
$ 1,000
$77,147
Who is Bram Stoker?
$ 17,973
$21,600
$5600

Questions?

Introducing Katie Greaves

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Creative Solutions Panel

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Amelia Ceja
President & CEO,
Ceja Vineyards

Tarek Salaway
Sr. VP / Area Manager
Kaiser Permanente

Dominique Szarmach
VP, Talent Management
Cannacraft

Doug Hamilton
President
Oak Grove Construction

Joe Bartolomei
Managing Partner
Famrhouse Inn
& Restaurant

MFG Day – October 4th, 2019

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2018 MFG DAY SONOMA COUNTY

April 30, 2019

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Fall Economic Forecast
October 11th, 2019

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