



Rogue Workforce Partnership - Corporate Directors Meeting

Thursday May 17, 2018 • 3:00-5:00 p.m. | 100 E. Main Street, Suite A - Board Room • Medford

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Agenda

- | | |
|--|---------------|
| Call to Order (1-2m) | Jessica Gomez |
| ‣ Welcome & Introductions | |
| Approval of Minutes (1-2m) - Action Item | Jessica |
| ‣ May 17, 2018–RWP Corporate Directors Meeting | |
| Policy Approval (1-2m) - Action Item | Aurora |
| ‣ Revised OJT Policy | |
| RWP Strategic Roadmap - Part II (15-20m) | Aurora King |
| ‣ Reporting template samples for review | |
| State of the Workforce Report | Jim & Aurora |
| ‣ Review samples from other workforce regions & discuss next steps
(click on links below to view) | |
| ▪ Work Systems Lane Workforce Partnership Willamette Workforce Partnership | |
| Workforce Board Meetings | Jim |
| ‣ Frequency & Joint Meetings with SOESD/K-12 Superintendents & College Presidents | |
| Other Items | Jessica |
| Adjourn | Jessica |

= Documents attached in packet or will be handed out at meeting



MINUTES

ROGUE WORKFORCE PARTNERSHIP • CORPORATE DIRECTORS

April 19, 2018 ♦ 100 E. Main St., Suite A - Board Room ♦ Medford, OR

MEMBERS PRESENT

Commissioner Rick Dyer
Chair, Jessica Gomez
Vice-chair, Michael Donnelly (via phone)
Nikki Jones
John Underwood
Paul Macuga (via phone)
Shawn Hogan

MEMBERS ABSENT

Commissioner Dan DeYoung

OTHERS PRESENT

Jim Fong, Executive Director, Rogue Workforce Partnership
Sherri Emitte, Chief Finance and Administration Officer, Rogue Workforce Partnership (via phone)
Aurora King, Chief Operating Officer, Rogue Workforce Partnership
Tami Allison, Senior Project Manager, Rogue Workforce Partnership

Quorum Present: Yes

1) Call to Order

The meeting was called to order by Chair, Jessica Gomez at 3:04p.m. Introductions were made for the benefit of those joining remotely.

2) Approval of Minutes

COMMISSIONER DYER MOVED TO APPROVE THE MINUTES OF THE FEBRUARY 22, 2018 RVWC& RWP CORPORATE DIRECTOR'S MEETING. THE MOTION WAS SECONDED BY JOHN UNDERWOOD AND APPROVED UNANIMOUSLY.

3) RWP Budget Adjustment

Sherri reviewed the PY 17 Budget Modification with the group indicating that the budget presented last July was based on estimates of both revenues and expenditures at that moment in time, and that now that we have a better sense of what these amounts should be, we are bringing a modification forward for approval. Sherri went on to note that the importance of

processing this modification is that these would be the final budget amounts used in comparison with the audited financial statements. The proposed budget modification reduces both revenues and expenditures by \$347,800. Sherri added that as we get closer to the end of the program year, a formal fund transfer will be done between Adult and DW funds.

Jim and Sherri both explained how the “draw” process works- the amount of time we have to spend out the funds, and that it is all based on reimbursement. Jim went on to add that “even though the Omnibus Bill is showing the Workforce Investment Program has an additional 70 million dollars, our allocation is going down. Our unemployment rate is very low right now and our piece of the pie is decreasing while others are increasing”, Jim stated.

The discussion moved to “Other Income” and Jim added that we need to figure out how to sustain the capacity that Dana brings. Dana was previously funded through ESD grants and this year she was not budgeted in. Jim talked about the conversation he had recently with individual school superintendents about asking for measure 98 or other funds to help fund this position. Superintendents are very supportive; however, some districts are being hit with unexpected expenses and don’t have the money this year. Dana’s position will be absorbed into the RWP budget this year.

Discussion went on to the timeliness in which we receive grants from the state. The grant funds are -distributed almost immediately; however, the agreements seems to lag for months and then we are expected to spend out the money in a timely fashion. Jessica feels it is our job to advocate for the people who are in need of these services as it is difficult for service providers to serve the participants out of other funds and then when agreement is received, go through the work to reclassify the expenditures to the grant. Aurora indicated that feedback was given with the final report for the Summer Youth Employment Program (SYEP) indicating that it would be optimal to receive next year grant’s statement of work by April so that service plans can be defined (and customers engaged) well before school is released for the summer. . Jim added that a Secretary of State Audit just highlighted this deficiency.

More discussion will be held regarding this matter at a future date.

Jim reported that the IFA’s are back to the drawing board because they have not been approved by Department of Justice and they will not be implemented for this year. A new template is coming out and the hope is that we will have something in place for next year. Jim noted that rent agreements would potentially go away with the IFA’s.

Expenditures were reviewed with the group and it was reported that personnel costs have decreased by about \$80,000 due in large part to not replacing the Senior Project Manager who left last September; as well as our PTO expense is lower than expected due to staff being able to

take more PTO than expected. Other changes included a decrease of over \$55,000 in the contracted workforce services budget and an increase in budgeted operating expenses for both RWP and the One-Stop Centers of about \$37,000.

COMMISSIONER RICK DYER MOVED TO APPROVE THE PY 17 BUDGET MODIFICATION AS PRESENTED WITH AN ADJUSTMENT OF (\$347,800). THE MOTION WAS SECONDED BY SHAWN HOGAN AND APPROVED UNANIMOUSLY.

4) Endowment Fund Options & Next Steps

Sherri presented the Corporate Directors with background information and documents. Sherri asked the group for any feedback on the policies and procedures as well as the oversight and management documents as this information is historical, and it is important that the current group agrees with previous thinking. A proposed policy will be brought back to the May Corporate Director's meeting.

A brief discussion took place regarding maintaining an adequate pool of cash and cash equivalent funds. It was suggested that we add the wording, "for the purpose of granting funds" to the end of that sentence. Also discussed was what was thought a reasonable goal for a prudent investment would be over a period of time. The group felt that 6-8% would be realistic but would hope to exceed that goal in many years.

Sherri will talk to the investment people regarding what would be a realistic percentage that we could expect to earn.

Sherri also reviewed the Investment Advisor Selection and Termination document with the group and asked for feedback. Some comments included:

- Security of the funds are important
- Set up a framework for future interaction / updates to the Board.

Sherri reported that a Request for Information (RFI) was sent out to 11 different financial advisors and four responses were returned. Sherri will be setting up times to meet with three of the four respondents and invited any of the Corporate Directors to participate. John Underwood and Mike Donnelly indicated that they would like to be involved. Sherri will forward the responses to the Corporate Directors for their review.

The discussion moved to recommended distributions from the endowment fund. It was recommended that the following amounts be dispersed:

- \$9500 for Careers in Gear

- \$5000 for Southern Oregon Success

COMMISSIONER DYER MOVED TO AUTHORIZE UP TO A MAXIMUM OF \$9,500 FOR CAREERS IN GEAR AND \$5,000 FOR SOUTHERN OREGON SUCCESS. THE MOTION WAS SECONDED BY NIKKI JONES AND APPROVED UNANIMOUSLY.

5) RWP Strategic Roadmap - Part II

At the last Workforce Board meeting, quite a bit of discussion took place about how to strategically identify the people to champion the initiatives. “Championing is not about doing all the work, but is about tracking the progress and reporting out as well as having the pulse on and identifying natural places in the community to have the discussion”, Aurora stated. Aurora indicated that she is thinking about how to create a framework for an information portal where champions, as well as staff can populate information.

Aurora highlighted the importance of ensuring that businesses and stakeholders feel value was received each time we have the opportunity to engage with them. How do we create a template to track progress in each of the strategies – and continue to refine and improve so the information stays relevant (highlight what we said we would do and what we actually did). Some suggestions included:

- Bullet important information
- Exception based reporting – focus on what is not going smoothly
- Celebratory information

Aurora indicated that work needs to take place around how we organize support to make the work happen within the initiatives (i.e. key stakeholders, elected officials, identifying a committee, identify additional champions).

Aurora responded to an inquiry regarding the dashboard initiative and indicated that the Local Leadership Team (inclusive of required WIOA partners representing Title I, Title II, Title III, and Title IV) have been working with OMEP to focus on three metrics; retention, business satisfaction, and focusing on equity for people receiving our services. Aurora noted that the group is currently in progress of developing a definition of equity that can be use consistently across programs.

Mike suggested that we discuss the communication across the two counties – marketing, communication, and consolidation of efforts so as to not duplicate. For instance, how can we leverage other youth program providers so services are not duplicated? Jim indicated that this

topic overlaps with the Business & Education Partnership (BEP) as well as Southern Oregon Success (SORS).

6) Southern Oregon Career Networking Event (SOCNE) / Oregon Second Chance Tour

Jim reported that this year the SOCNE event will take place in September and will partner with the Veteran's group to do a stand down. The event will take place from 11 a.m. – 4 p.m. and will also dovetail with the Oregon Second Chance Tour event earlier in the morning. Jim indicated that we have a great partnership with ODOT, as well as other robust partnerships that we hope will participate in the event. Jim will follow up with Jackson County Parole & Probation Director Eric Guyer to find out what their participation will be with the Oregon Second Chance Tour. Save the date invitations will be sent out in the near future.

7) National Association of Workforce Boards Forum & Oregon Workforce Partnership - WORKing Together Inaugural Conference

Jessica, Aurora, and Jim reported on their trip to NAWB. Breakout sessions attended included; employee owned daycare, international industry, Apprenticeship 2.0, and The Future of Work.

Aurora spoke briefly about the Apprenticeship 2.0 which is a very effective apprenticeship model in Switzerland. The Swiss model engages students at 15 or 16 years of age, prepares them with 21st century skills for high-demand, high-skilled jobs, and allows them to pursue higher education (including university degrees) and training. Many students spend one or two days at school and the rest of their week applying what they learn in the workplace. This allows a healthy transition into working life—as evidenced by their low unemployment and high retention rates.

WORKing together is scheduled for September 26-27, 2018 in Eugene and will have Steve Brown (The Bald Futurist) as their keynote speaker.

8) State of the Workforce Report

This item was deferred to the next meeting.

9) Workforce Board Meetings

This item was deferred to the next meeting.

11) Other Business

No other business was brought before the RWP Corporate Directors.

12) Adjourn

With no further business, the RWP Corporate Directors meeting was adjourned at 5:01 p.m.

Respectfully Submitted,

Tami Allison
Senior Project Manager

<hr/>	
Approved	Date
Jessica Gomez, RWP Chair	

The RWP is a private/public partnership which addresses the workforce development needs of Jackson and Josephine Counties
100 E. Main Street, Suite A | Medford, OR 97501 | (541) 842-2500



Action Brief

To: Rogue Workforce Development Board Corporate Directors

From: Aurora King, Chief Operating Officer

Date: May 10, 2018

Subject: Policy Update for On-the-Job Training

Background

With a strategic goal to align supply (individuals seeking new careers and/or career development options) with demand (business needs), The Rogue Workforce Partnership's prerogative is to identify areas of opportunity that result in successful job placements, meeting both the needs of business with the needs of prospective workers. The creation of this 'match' requires creativity and flexibility.

It is the expectation of the Rogue Workforce Partnership (RWP) that On-the-Job Training (OJT) program placements result in both a solution to the needs of the business, and an entry to a sustainable career path for the participant. While many businesses in the region hire participants directly, it is common for other businesses to utilize staffing agencies to support recruitment and complete the necessary paperwork for the hiring process.

When a staffing agency is the only vehicle for a participant to gain an opportunity with a company, an agreement must be entered by the staffing agency, the business (e.g., OJT worksite), and the RWP's service provider, WorkSource Rogue Valley. As such, the agreement must require commitment for the individual to be considered for long-term employment, in the event that the training is successful and the OJT is a good match for both the participant and the business. In such instances when the training is unsuccessful or the OJT is not a good match for the participant and the business, reasons must be documented.

Recommendation

Staff recommends that the Rogue Workforce Development Board Corporate Directors approve the attached On-the-Job Training policy with updated language stating that agreements will only be entered with staffing agencies when that process is the participant's only vehicle for a permanent job. Additionally, the participant must be considered for long-term employment at the conclusion of their training period. The agreement must be acknowledged by the staffing agency, business, and service provider.



Title: On-the-Job Training

Purpose

To provide guidance for the On-the-Job Training (OJT) service activity for Title 1 Adult, and Dislocated Workers (DW) in Jackson and Josephine Counties, funded under the Workforce Innovation and Opportunity Act (WIOA), as well other funds allocated for OJT's.

References

Governing guidelines include WIOA 134(c)(3)(D) ii, CFR 680.700-680.710, as well as applicable state and local funding stream requirements for On-the-Job Training.

Scope

The purpose of an On-the-Job Training (OJT) contract is to assist businesses in training and retaining skilled, productive workers. Through the OJT contract and training plan, occupational training is provided for the participant in exchange for the reimbursement of up to 50 percent of the wages paid by the employer during the training period. OJT's may be used to help train new employees, eligible current employees, and employees hired to regular permanent employment through a staffing service relationship. This policy applies to recipients, sub-recipients, and any other authorized provider of WIOA Title 1B training funds.

Policy

In accordance with WIOA, funds for OJT's will be used for individuals in need of on-the-job skills training in order to secure new employment; to provide additional skills training to advance in their job; an opportunity to gain skills to earn a self-sufficient wage; capacity to support Registered Apprenticeship/partner programs; or to prevent job loss. The required skills and business needs will be determined and appropriately documented on an individual basis prior to contractual agreement. The candidate's "skills gap" must be clearly articulated, including a plan for the delivery of training to the individual, as well as an evaluation process to ensure that training was delivered and a standard was met. These funds are provided as a wage reimbursement for up to 50% of the employee's wages, and are provided to the employer, or the employer's financial representative, upon completion of the training agreement.

Employers will be reimbursed at an average of \$3,500 per OJT and, at the discretion of RWP staff, in coordination with appropriate sub-recipient staff, to approve up to an average of \$5,000 for higher wage/higher skills training opportunities. The following criteria apply to the implementation of an OJT where the employment position:

- Has a wage of at least \$11.00 per hour;
- Is at least 30 work hours or more per week;
- Offers benefits to the employee. (If no medical benefits are offered, it's preferred that the job pay at least \$12.00 per hour.)
- Has a training period for no less than 4 weeks and no more than 26 weeks (or six months) and;

- Is preferred to be an in-demand industry sector or occupation that falls in the local region's sector strategies, which include Advanced Manufacturing, Information Technology, Electronic Commerce, Healthcare, or as determined to be in demand by the support of local labor market information.

When a staffing agency is the only vehicle for a participant to gain an opportunity with a company, an agreement must be entered by the staffing agency, the business (e.g., OJT worksite), and the RWP's service provider, WorkSource Rogue Valley. As such, the agreement must require commitment for the individual to be considered for long-term employment, in the event that the training is successful and the OJT is a good match for both the participant and the business. In such instances when the training is unsuccessful or the OJT is not a good match for the participant and the business, reasons must be documented.

OJT contracts may be written for eligible employed workers when:

- The employee is not earning a self-sufficient wage or wages comparable to or higher than wages from previous employment; or
- The OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills; workplace literacy; or
- The OJT facilitates a wage gain of at least \$1.00 per hour or more by the end of the training period or sooner, and
- Results in an upgrade to a new position with a different scope of work and title.

An exception may be granted by Rogue Workforce Partnership. Examples of exceptions might include (but are not limited to) a worker who has a disability and requires retraining, medical benefits and regular employment status are gained as a result of the training, or a layoff can be averted through retraining.

Additional preferences includes the following:

- Employer will "backfill" with a new hire for the employee's previous position through WorkSource Rogue Valley when training is complete; or
- Employer offers concurrent skill building opportunities for the employee to access; or
- Business falls within a "traded-sector" industry.

Only businesses with a history of successful training and retention of OJT employees should be used as repeat OJT sites. Employers that use OJT to subsidize short-term "revolving door" positions will be decertified as OJT sites. For the purposes of re-contracting and "pattern of failure" considerations, additional OJT agreements and/or training plans should not generally be negotiated with any business that, having had five or more previous OJT training plans:

- Does not meet an employment (retention) rate of 75%.
- Exception: When a business does not meet the employment rate of 75% for five or more trainees, but agrees to a corrective action plan that addresses the identified problems, additional OJT training plans may be approved on an interim basis after the corrective action plan has received administrative approval from the Rogue Workforce Partnership. Absent an

approved corrective action plan, a business that has been determined to exhibit a pattern of failure to retain trainees will be decertified as an OJT site for a limited duration of two years.

- Such corrective action decisions should take into account the circumstances of trainees who have failed to complete training or have not been retained for 90 days or longer following training. A pattern of failure determination is generally not made until at least five OJT training plans have expired. Efforts should be made to determine why trainees failed to complete.





For other discretionary grant projects that provide OJTs as a training opportunity, a different reimbursement percentage, minimum wage, and hourly wage gain requirement may be established through Rogue Workforce Partnership for the project.

Approved by: _____
RWP Chair

Date: _____

By the end of 2021, RWP will be nationally recognized for building community partnerships that help government, education, and industry leverage resources that create a dynamic system of access points for career opportunities, resulting in economic growth, sustainable programs, and a more highly skilled workforce.




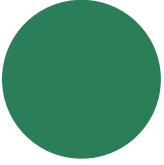

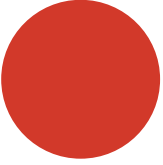
<p>MISSION</p>	<p><i>To advance the region's economic vitality by developing a business-responsive workforce that promotes prosperity.</i></p>		
<p>STRATEGIC DRIVER</p>	<p align="center">  Align and leverage industry, government and education resources around workforce sector needs. </p>		
<p>KEY STRATEGIC INITIATIVE</p>	<p align="center">Assess workforce/education skills training, & the gaps, barriers & potential connecting points; prioritize & consolidate efforts</p>		
<p>Sponsor</p>	<p>Alex Campbell</p>		
<p>Objective</p>	<p align="center">Inventory current efforts </p>	<p align="center">Assess Gaps </p>	<p align="center">Assess Barriers </p>
<p>Comments</p>			
<p>Additional supports or resources needed to move forward:</p>			
<p align="center"> Indicators: Green = in progress (meets & exceeds target) Yellow = Slowly making progress (within range of target) Red = Stalled/lost track (significantly off target) </p>			

STRATEGIC INTENT

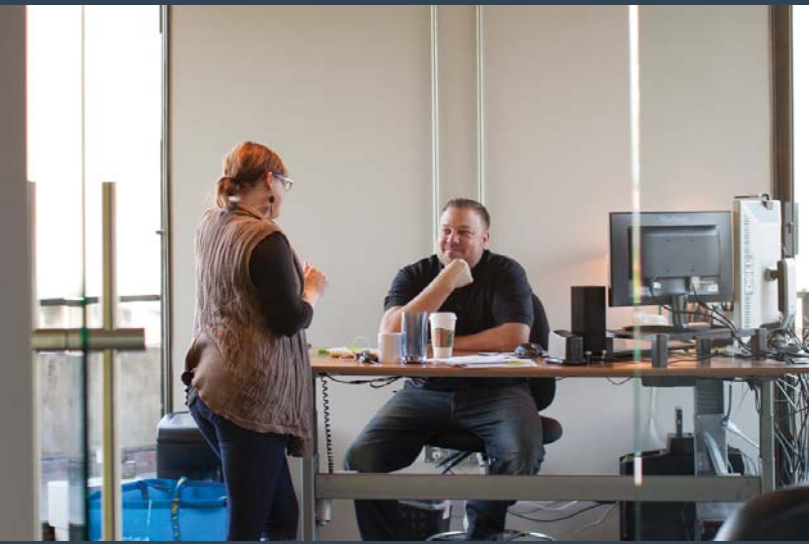
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ROGUE WORKFORCE PARTNERSHIP

<p>MISSION</p>	<p><i>To advance the region's economic vitality by developing a business-responsive workforce that promotes prosperity.</i></p>		
<p>STRATEGIC DRIVER</p>	<p>Align and leverage industry, government and education resources around workforce sector needs.</p>		
<p>KEY STRATEGIC INITIATIVE</p>	<p>Assess workforce/education skills training, & the gaps, barriers & potential connecting points; prioritize & consolidate efforts</p>		
<p>SPONSOR</p>	<p>Alex Campbell</p>		
<p>OBJECTIVE</p>	<p>Inventory Current Efforts</p>  <p>In Progress (Meets or Exceeds Target)</p>	<p>Access Gaps</p>  <p>Slowly Making Progress (Within Range of Target)</p>	<p>Assess Barriers</p>  <p>Stalled/Lost Track (Significantly Off Target)</p>
<p>COMMENTS</p>			
<p>ADDITIONAL SUPPORT OR RESOURCES NEEDED</p>			

2019 STATE OF THE WORKFORCE REPORT



LANE WORKFORCE
PARTNERSHIP



LANE WORKFORCE
PARTNERSHIP

2016 STATE OF THE
WORKFORCE REPORT

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MESSAGE FROM THE DIRECTOR

As the Executive Director of Lane Workforce Partnership, I am very pleased to present the 2016 State of the Workforce Report. The data presented in this report begins with local labor market data analyzed by Brian Rooney, Regional Economist from the Oregon Employment Department and is vetted with local businesses for additional input and information. I specifically want to thank Jessica McCormick, our Workforce Project Manager for her work in the overall construction, design, and writing of this report.

We last published this report in 2014 and since then the Lane County economy has continued to demonstrate strength, vitality, and diversity of industry. I am particularly proud of the creation of the Lane County Sector Strategy Team (LCSST). The LCSST is comprised of leaders throughout Lane County – business CEOs, elected officials, Chamber presidents, city managers and planning staff. Under the leadership of the Lane Workforce Partnership Board of Directors, and the Chair of the Board, Todd Edman, the team works collaboratively to address specific industry issues.

The first industry the LCSST chose to focus attention on was the growing tech industry. There are currently 418 tech companies in Lane County employing nearly 5,000 people with average wages of \$74,000. As a result, the Board invested in the creation of a local chapter of the Technology Association of Oregon (TAO).

Under the leadership of Matt Sayre, the Eugene TAO has led initiatives to empower local tech companies and entrepreneurs. TAO's 2016 Strategic Initiatives in greater Eugene include: 1) Connecting the local tech community to resources around the state and to one another. 2) Supporting workforce initiatives and STEM curriculum development among regional K-12 and higher-ed institutions. 3) Galvanizing efforts to make high speed Internet more accessible. 4) Helping promote the southern Willamette Valley tech community as a great place to work (and ensure that it really is).

However, tech isn't the only industry that is growing in Lane County. The food and beverage industry, made up of ice cream, popcorn, honey, and other specialty food manufacturers, as well as, beer brewers and wine makers is taking off and establishing national brand recognition. Under the leadership of Lynne Fessenden, Executive Director of the Willamette Farm and Food Coalition, a local brand for the food industry was created and recently released. The brand will bring national recognition to the region for growing and producing high quality food.

“It turns out that advancing equal opportunity and economic empowerment is both morally right and good economics, because discrimination, poverty and ignorance restrict growth, while investments in education, infrastructure and scientific and technological research increase it, creating more good jobs and new wealth for all of us.”

–William J. Clinton

A special thank you to Kari Westlund, CEO of Travel Lane County, for leading an earned media campaign for the region. This campaign resulted in a number of articles being published in Alaska, Horizon, and United Airlines magazines. Each article showcased the region’s diverse industries, talent opportunities, and the sheer beauty of our cities. Travel Lane County has also produced a number of videos that highlight the region’s quality of life while also encouraging tourism, and attracting talent to the region.

I would be remiss if I did not mention the strength and vitality of the wood products industry in Lane County. The wood products industry continues to be a backbone industry for Lane County, providing family wage jobs with career pathway opportunities supported by industry leaders.

Looking forward, I am excited to further our work through continued collaborations and partnerships with talented leaders. The strategic investments made in innovative workforce development activities will help local businesses continue to grow and will assist local job seekers in gaining the necessary skills to compete for family wage employment opportunities.

Let’s get things done...together!



Kristina Payne

MISSION: TO MEET THE
WORKFORCE NEEDS OF
EMPLOYERS AND INDIVIDUALS
THROUGH PARTNERSHIPS AND
INNOVATION.

VISION: LANE COUNTY WILL
HAVE A TRAINED WORKFORCE
AND INDIVIDUALS WILL HAVE
THE KNOWLEDGE AND SKILLS
FOR CAREER SUCCESS.

INTRODUCTION TO LANE COUNTY'S WORKFORCE SYSTEM

Oregon's Workforce Development System helps the emerging workforce (youth ages 14 to 26), the transitional workforce, and the current workforce obtain and succeed in family wage jobs. In addition, the Oregon Workforce Development System assists businesses in finding top candidates for job openings and works to find solutions to workforce challenges.

In Oregon, there are nine Local Workforce Development Boards who are responsible for brokering services for Adults, Dislocated Workers, and Youth through the Workforce Innovation and Opportunity Act (WIOA). In Lane County, Lane Workforce Partnership (LWP) is the Local Workforce Board.

The Workforce Innovation and Opportunity Act emphasizes alignment between workforce systems. As a result, local workforce boards have created coordinated four-year strategic plans that complement the goals adopted by the Oregon Workforce Investment Board (OWIB). The current OWIB goals include:

- **Creating a customer-centric** workforce system that is easy to access, highly effective, and simple to understand.
- Providing business and industry with **customized workforce solutions** to prepare and deliver qualified and viable candidates.
- **Investing in Oregonians** to build in-demand skills, match training and job seekers to opportunities, and accelerate career momentum.
- Creating and developing talent by **providing young people with information** and experiences that **engage their interests**, spur further career development, and connect to Oregon employers.

In 2016, Lane Workforce Partnership's Board of Directors adopted the following goals as part of the Strategic Plan for 2016-2020:

- **Goal 1:** Prepare workers for jobs in a new and changing economy.
- **Goal 2:** Prepare our youth for future employment.
- **Goal 3:** Connect individuals to education, skill-building, and employment opportunities in industries and occupations most impacted by retirements.
- **Goal 4:** Expand the use of services and increase job placements for under-represented populations, including: women, minority groups, those over 50, veterans, people with disabilities, and rural communities.
- **Goal 5:** Improve alignment among community leaders to meet key outcomes as identified by industry.

Lane County has been addressing similar goals at the local level over the past several years through effective sector strategies, innovative training programs, and the promotion and fostering of strong partnerships with partners across the County. Lane County is already well-positioned to continue to develop and implement valuable workforce services for its workers, employers, job seekers, and youth.

ECONOMY, TRENDS, STATISTICS

ECONOMIC TRENDS

The economy in Lane County has transformed over the past two decades from one that was largely dependent upon the wood products industry to one that is high-tech, forward thinking, environmentally conscious, and diverse (Table 1). Food product manufacturers have found niches in organic products, the software industry has grown, health care continues to strengthen the economy, and state and federal government agencies (including the University of Oregon) have continued to add jobs.

Unemployment rates in the county have typically averaged higher than the United States. This trend was unsurpassed between 2007 and 2010, during the Great Recession, when the county lost 15,900 jobs, or 10.1 percent of its employment (far exceeding the statewide percentage of 7.5). As of August 2016, the unemployment rate in Lane County was 5.9 percent.

**Table 1: Lane County Employment
June 2016**

Government	20%
Education and Health Services	15%
Retail Trade	13%
Professional and Business Services	11%
Leisure and Hospitality	11%
Manufacturing	9%
Financial Activities	5%
Construction	4%
Wholesale Trade	4%
Other Services	3%
Information	2%
Transportation, Warehousing, and Utilities	2%
Mining and Logging	1%

Source: Oregon Employment Department

Table 2 demonstrates how construction and manufacturing were particularly hard hit during the recession. Construction lost 36 percent of its employment and manufacturing lost 38

LANE COUNTY UNEMPLOYMENT DROPPED BY 1,247 PEOPLE BETWEEN 2014 AND 2016

UNEMPLOYMENT RATE 2014

6.9%

UNEMPLOYMENT RATE 2016

5.9%

LANE WORKFORCE PARTNERSHIP

percent. In manufacturing, wood products lost 1,100 jobs and transportation equipment lost 3,300 jobs (80 percent). Health care was the only industry to grow during the recession and added 1,100 jobs locally, due in part to the addition of the RiverBend Medical Center.

The most recent annual figures show growth coming out of the recession. Between 2014 and 2015 Lane County added 3,700 jobs for a 2.5 percent growth rate. Several industries are contributing to the rebound including manufacturing, construction, health care and government.

AN IMPROVING LABOR MARKET

The current trend towards a tightening labor market makes for more opportunities for workers looking for jobs, but also creates more competition for employers looking for good workers. Due to employment growth and retirements, the unemployment rate has dropped from 6.0 percent to 4.7 percent, the lowest seasonally adjusted rate since 1990.

Even though the county is seeing a strengthening economy with a tightening labor market, it still has not reached pre-recession levels of employment. Using monthly data, the county lost 18,000 jobs from the high in

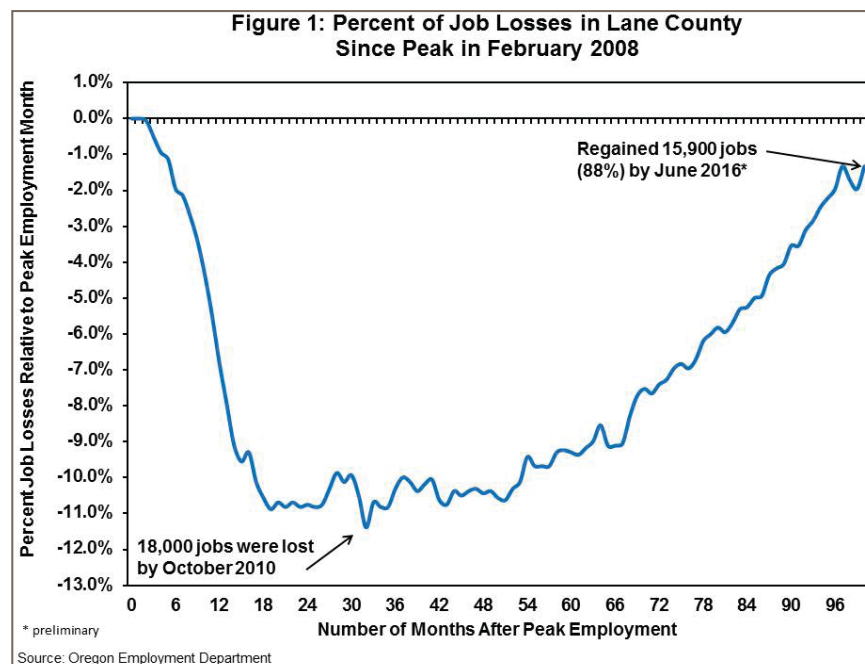
Table 2: Lane County Employment Change (Annual Average)

	2007-2010	2014-2015
Mining and logging	-200	-100
Construction	-2,900	300
Manufacturing	-7,600	200
Wholesale trade	-700	200
Retail trade	-1,900	800
Information	-700	-300
Financial activities	-1,000	400
Professional and business services	-1,700	300
Health care	1,100	900
Leisure and hospitality	-1,100	600
Other services	-300	200
Government	1,600	300

Source: Oregon Employment Department

February 2008 to the low in September 2010. As of June 2016, Lane County had gained back 15,100 jobs or 88 percent of those lost in the recession (Figure 1).

As the economy improves and the labor market tightens, we are seeing some of the residual challenges that workers faced coming out of the recession improve and the pool of workers available to employers shrink.



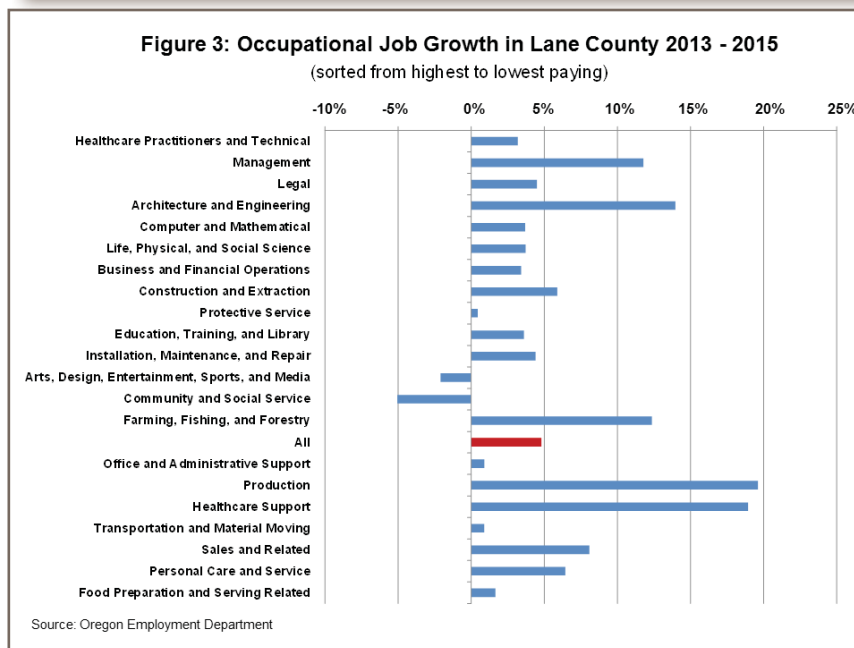
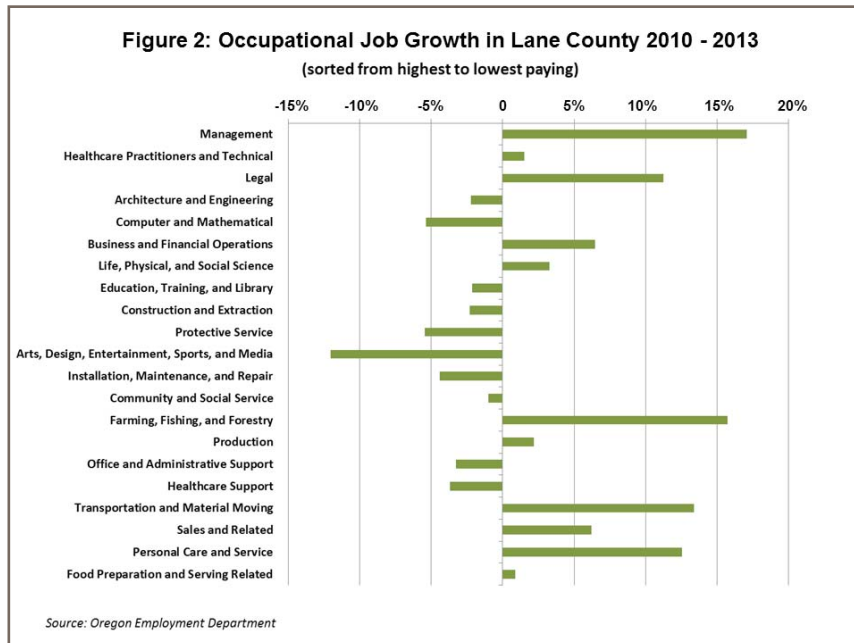
LANE WORKFORCE PARTNERSHIP

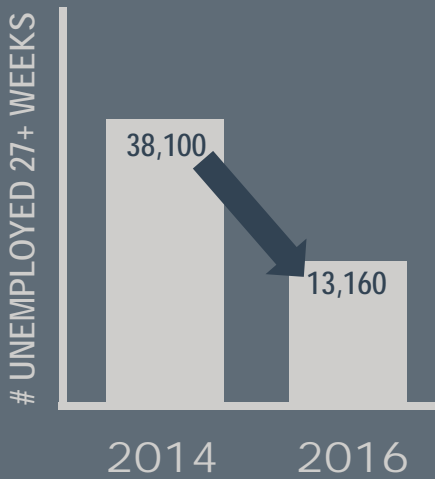
WAGE POLARIZATION

Another challenge for workers coming out of the recession is wage polarization, sometimes called the hollowing out of the middle class. During the recession, manufacturing and construction, two industries with a great deal of middle wage jobs, were two of the hardest hit. Subsequently, employment growth lagged in these industries during the recovery. In addition, as revenues to governments were reduced due to less income and lower property values, cuts were made to government, in particular, local education. The result was polarization, where

job growth during the recovery was seen in lower and higher paying occupations but not much in middle range.

Figure 2 and 3 show how wage polarization in Lane County is improving. Figure 3 illustrates that middle wage occupations in construction, education, installation, maintenance and repair have turned positive after being negative for several years. Even with the improvement in job growth from 2013 to 2015, middle wage jobs are growing at a slower rate than either higher or lower paying jobs.





Source: Oregon Employment Department

LONG TERM UNEMPLOYMENT DROPS 36 PERCENT IN TWO YEARS

Long-term unemployment, which remained at elevated levels for several years after the recession, is approaching pre-recession levels. As of April 2016, 15 percent of unemployed Oregonians had been out of work for more than six months. This is an improvement from 2014 when 27 percent of unemployed Oregonians had been out of work for more than six months. Each month on unemployment increases the odds a person will completely drop out of the labor market. Keeping the long-term unemployed engaged in the labor force until they can get back to work is one of the key challenges facing Oregon and Lane County.

LANE COUNTY'S EMPLOYMENT GROWTH

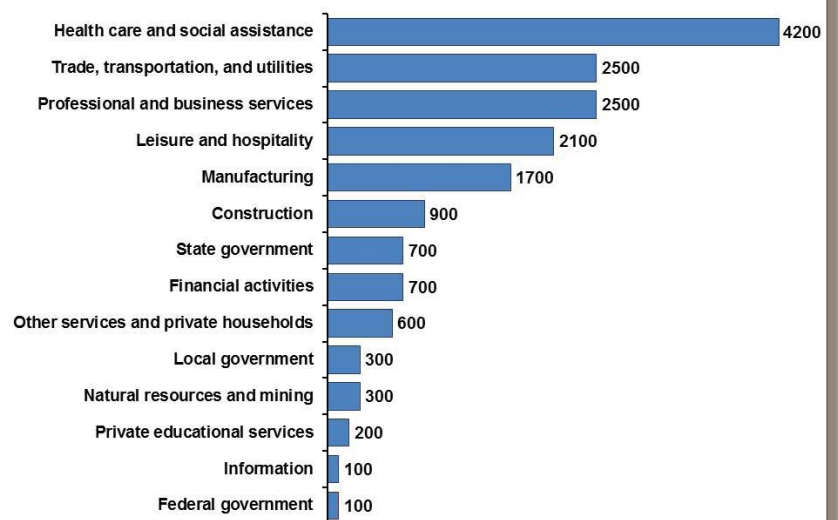
The 2014 to 2024 employment projections reflect a continuing recovery from the Great Recession. However, as the recovery from the Great Recession matures, growth will slow down. In Lane County, some industries are expected to continue to grow rapidly between 2014 and 2024 including health care, construction, and professional and business services. As shown in Figure 4, all Lane County industries are expected to add jobs from 2014 to 2024.

Lane County will add 16,800 jobs between 2014 and 2024. This represents an 11 percent increase in employment over 10 years. This is lower than the statewide increase of 14 percent over the same period. The growth stems from anticipated private-sector gains of 15,700 jobs (13 percent) and the addition of 1,100 jobs (4 percent) in government. The projected percent growth rate exceeds the one percent growth seen over the past decade.

Even in industries that are expected to grow slowly, there will

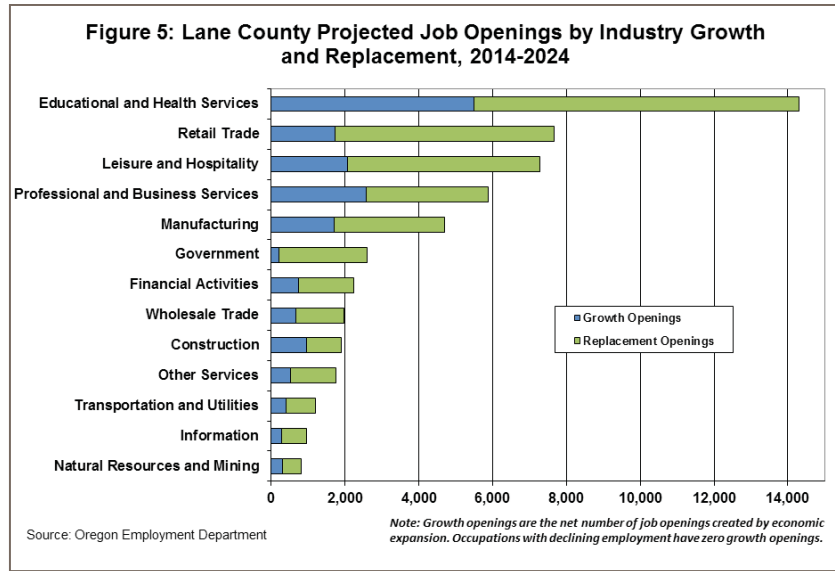
be opportunities created by replacement needs (Figure 5). Replacement needs are created when someone permanently leaves an occupation and does not include regular turnover. Retirement is a common reason for the creation of replacement openings. As the population ages and retirements increase, the level of replacement openings will increase.

Figure 4: All Lane County Industries Expected to Add Jobs, 2014-2024



Source: Oregon Employment Department

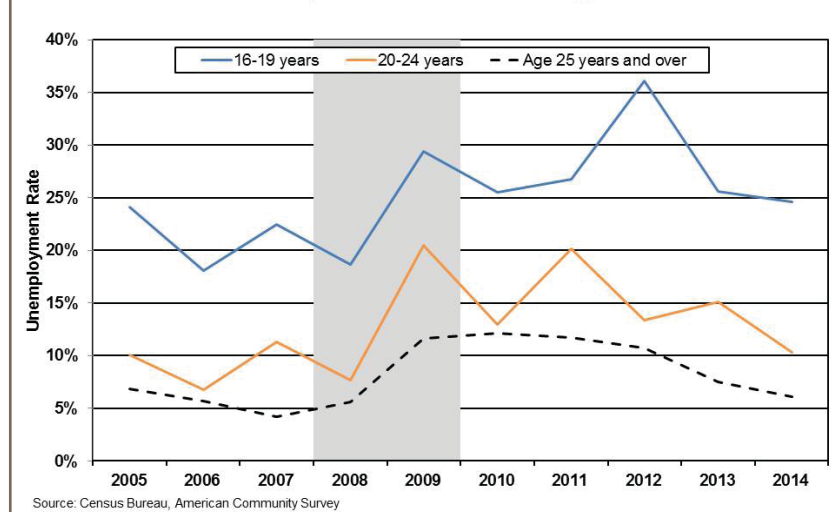
LANE WORKFORCE PARTNERSHIP



LANE COUNTY EMPLOYMENT GROWTH HIGHLIGHTS:

- Health care and social assistance adds 4,200 jobs and has the fastest growth due to a growing and aging population.
- Construction is expected to continue its rebound from large losses during the recession. Propelled by the need to fill low housing inventory, the industry is expected to add 900 jobs.
- Leisure and hospitality will add 2,100 jobs due to tourism and retirees.
- Manufacturing grows by 1,700. Durable goods manufacturing grows with the additions in computer and electronic manufacturing (Broadcom), wood products (Swanson Lumber Mill) and transportation equipment (Winnebago) early in the job forecast. Nondurable goods manufacturing grows, adding 400 jobs largely from food and beverage manufacturing.
- Natural resources and mining, which includes logging and sand and gravel mining, is expected to grow 300, due in part to an improving local construction industry.

Figure 6: Unemployment Rates for Lane County's Youth
(Years with Recession Shaded in Grey)



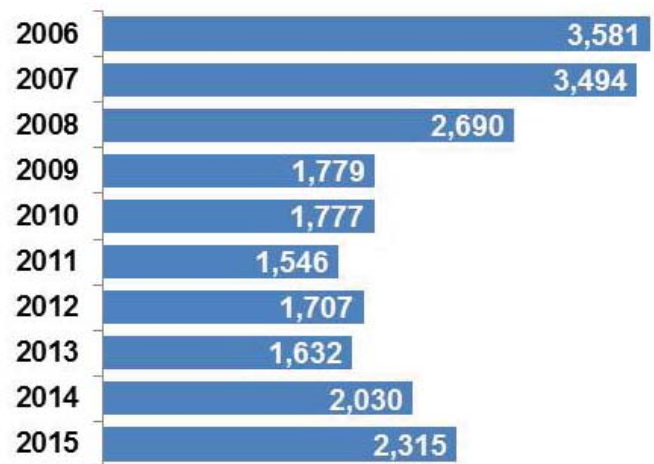
CHALLENGES FOR YOUNGER WORKERS

In addition to long-term unemployment and wage polarization, the recession has negatively affected opportunities for younger workers. The recession created more competition from older, more experienced workers, sending youth unemployment rates in Lane County to record highs. Figure 6 shows that these rates have remained high even as rates are beginning to fall for older workers.

Having a part-time or summer job used to be a normal situation for many teenagers. The impact of the recession was amplified for summer teen employment. In 2015, new hires in the third quarter (summer) were just over 2,300, whereas, during pre-recession periods, third quarter teen hires were closer to 3,500 (Figure 7).

All age groups were affected by the recession, but the effects on young workers could have long-term consequences. The workforce problems facing younger workers today may follow them well into the future through lower lifetime earnings. Many of the essential “soft” skills that employers value are gained through early work experience. Getting younger workers to work and establishing the experience and income that first jobs provide, is a key workforce challenge facing Lane County.

Figure 7: Lane County Teen Hiring



Source: U.S. Census Bureau, Local Employment Dynamics



WAGES

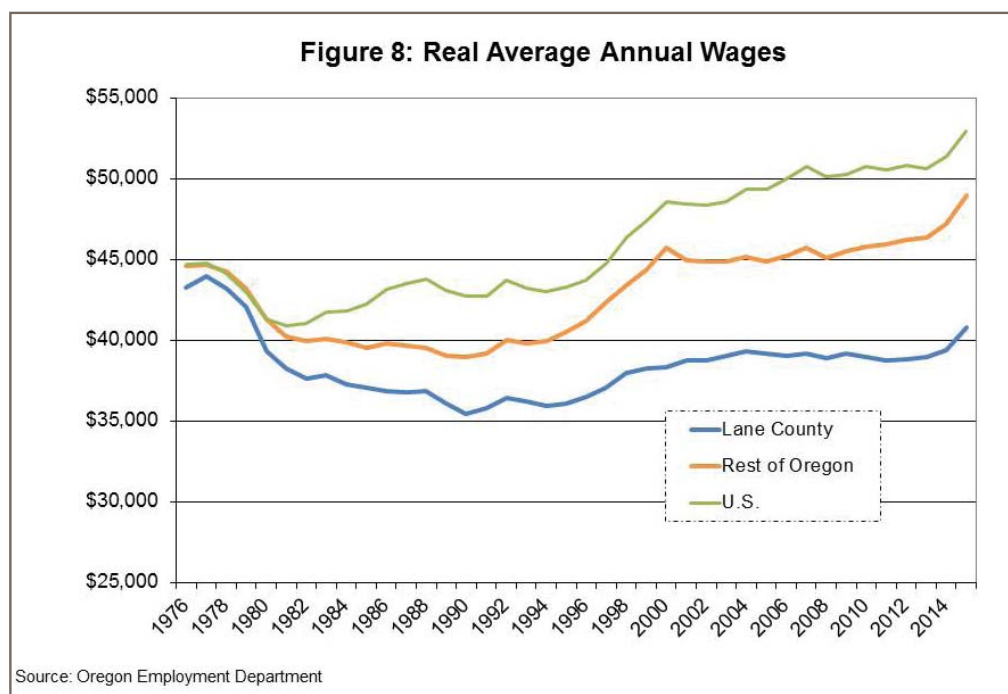
Real average wages in Lane County steadily increased with the addition of high tech manufacturing and stabilization in the wood products industry. Wages peaked in 2004 at \$39,276 up \$3,810, or 11 percent. Since then, wages have stagnated and remained around \$38,000. In 2015, an improved labor market and low overall inflation caused real average annual wages to top \$40,000 for the first time since 1979 at \$40,754.

The increase in real wages was not enough to keep the wage gap between Lane County and the rest of the state from expanding (Illustrated in Figure 8). In 1990, Lane County wages were 10 percent less than the rest of the state. By 2000, the gap had expanded to 19 percent, largely due to rapid growth in high-tech manufacturing in the Portland area. After some improvement, the wage gap with the rest of the state has grown to 20 percent.

An industry mix made up of lower-paying industries compared to the Portland area explains some of the wage gap between Lane County and the rest of the state. Additionally,

quality-of-life factors in Lane County such as less congestion, proximity to outdoor recreation, lower housing prices, and shorter commute times may also explain the wage differences of Lane County and the Portland area.

Although the earnings of the average worker in Lane County was \$40,754 in 2015, many earned considerably less. Roughly 65 percent of the jobs in Lane County were in occupations that averaged less than the county average of \$40,754 (Table 3). In Lane County, most of the largest occupations pay less than the average wages for all occupations. For example, retail sales, food preparation and serving workers, and cashiers pay less than \$29,000. Registered nurses and general operations managers are the exception for large occupations, paying \$82,139, and \$88,012 respectively.



LANE WORKFORCE PARTNERSHIP

Table 3: Largest Occupations and Highest Paying Occupations in Lane County		
Largest Occupations	2014 Employment	2016 Average Wages
Retail Salespersons	5,602	\$28,736
Cashiers	4,024	\$22,806
Combined Food Preparation and Serving Workers, Including Fast Food	3,786	\$21,490
Office Clerks, General	3,040	\$31,803
Registered Nurses	3,017	\$82,139
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2,485	\$34,494
Bookkeeping, Accounting, and Auditing Clerks	2,375	\$37,849
General and Operations Managers	2,357	\$88,012
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	2,351	\$26,882
Waiters and Waitresses	2,124	\$21,069
Personal Care Aides	2,124	\$23,664
Laborers and Freight, Stock, and Material Movers, Hand	2,070	\$28,055
Customer Service Representatives	2,040	\$36,155
Truck Drivers, Heavy and Tractor-Trailer	1,993	\$42,717
Cooks, Restaurant	1,641	\$25,754
Highest Paying Occupations	2014 Employment	2016 Average Wages
Dentists, General	219	\$222,938
Pediatricians, General	42	\$218,748
Family and General Practitioners	157	\$205,779
Judges, Magistrate Judges, and Magistrates	28	\$143,746
Chief Executives	191	\$139,982
Training and Development Managers	27	\$100,112
Pharmacists	302	\$123,552
Postsecondary School Administrators	265	\$117,860
Nurse Practitioners	89	\$115,484
Natural Sciences Managers	66	\$113,290
Computer Network Architects	27	\$109,784
Sales Engineers	53	\$109,362
Architectural and Engineering Managers	90	\$107,540
Sales Managers	459	\$105,175
Medical and Health Services Managers	300	\$104,878

Source: Oregon Employment Department

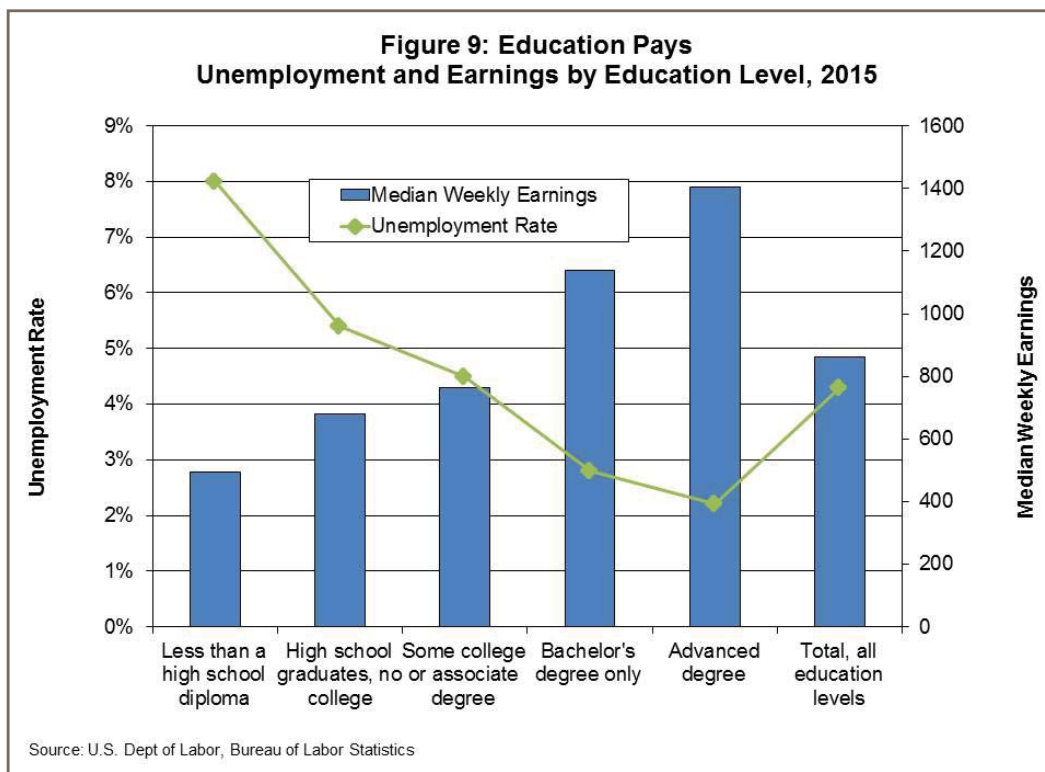
EDUCATION

Historically, a majority of jobs in Lane County required little in the way of training or education. New trends, illustrated in Table 4, show that some of the fastest growing occupations require post-secondary education and training even for entry-level work. The typical education for 63 percent of positions in 2024 will require a high school diploma or less — many of these jobs being lower-paying service and retail occupations. Jobs that require an associate's degree or other post-secondary training are expected to grow 11 percent overall and 14 percent in fast-growing occupations. Those requiring a professional or graduate degree will grow by 14 percent.

Data for the U.S. shows a direct correlation between education levels, earnings, and unemployment — the higher the education level, the higher the pay and the lower the chances of being unemployed (Figure 9). People with less than a high school diploma averaged \$493

in weekly earnings and an unemployment rate of 8.0 percent in 2015 while people with a bachelor's degree earned \$1,137 in weekly earnings and had a 2.8 percent unemployment rate.

Lane County's educational attainment levels have increased over time. The share of the 25 and older population with less than a high school degree declined from 17 percent in 1990 to 8.9 percent in 2014 while the share with a bachelor's degree or higher increased from 22.2 percent to 28.2 percent. As shown in Table 5, these percentages compare favorably with those from Oregon and the U. S. In 2014, the percentage of the population 25 and older with less than a high school diploma was lower in Lane County (8.9 percent) than Oregon (10.6 percent) and the U.S. (13.6 percent). The population with a bachelor's degree or higher was about the same in Lane County at 28 percent compared to 30 percent for Oregon and 29 percent for the U.S.



LANE WORKFORCE PARTNERSHIP

Table 4: Lane County Forecasted Typical Educational Attainment

Typical entry-level education							
Education	2014 Employment	2024 Employment	Employment Change	Percent Change	Growth Openings	Replacement Openings	Total Openings
Doctoral or professional degree	2,799	3,291	492	17.6%	493	603	1,096
Master's degree	5,754	6,463	709	12.3%	710	1,178	1,888
Bachelor's degree	28,538	32,317	3,779	13.2%	3,795	6,111	9,906
Associate's degree	3,899	4,458	559	14.3%	561	967	1,528
Postsecondary training (non-degree)	15,859	17,467	1,608	10.1%	1,733	7,775	4,508
High school diploma or equivalent	56,666	62,940	6,274	11.1%	6,555	12,077	18,632
Less than high school	42,945	48,071	5,126	11.9%	5,134	13,344	18,578
Typical competitive-level education							
Education	2014 Employment	2024 Employment	Employment Change	Percent Change	Growth Openings	Replacement Openings	Total Openings
Doctoral or professional degree	6,969	7,887	918	13.2%	920	1,418	2,338
Master's degree	11,264	12,549	1,285	11.4%	1,287	2,402	3,689
Bachelor's degree	26,823	30,606	3,783	14.1%	3,809	6,025	9,834
Associate's degree	15,121	16,354	1,233	8.2%	1,352	2,653	4,005
Postsecondary training (non-degree)	30,282	34,000	3,718	12.3%	3,779	6,060	9,839
High school diploma or equivalent	66,001	73,611	7,610	11.5%	7,834	18,597	26,431

Source: Oregon Employment Department

Table 5: 2014 Educational Attainment in Population 25 Years and Older

	Lane County	Oregon	United States
% less than high school	8.9%	10.6%	13.6%
% high school grad or higher	91.1%	89.4%	86.4%
% associate's degree	8.3%	8.2%	7.9%
% bachelor's degree or higher	28.2%	30.1%	29.3%

Source: 5 - Year American Community Survey

KEY MESSAGES FOR EDUCATIONAL REQUIREMENTS IN LANE COUNTY:

- Approximately 34 percent of Lane County's projected growth and replacement job openings will require post-secondary education or more as the typical entry-level educational requirement.
- A little over half of these openings will require post-secondary education from candidates who want to be really competitive for the positions.
- Roughly 64% of the high-wage, high-demand job openings require post secondary education or more.
- Growth in health care and federal and state government makes the overall need for post-secondary education a little more in Lane County than statewide.

NEW MINIMUM WAGE LAW

On March 2, 2016, Senate Bill 1532 was signed into law. As a result, Oregon's minimum wage will increase in steps through 2022. There will be three tiers (Standard, Portland Metro, and Nonurban Counties) of step increases, based on geography.

Lane County is in the Standard tier. This means that by 2022, Lane County's minimum wage will increase to \$13.50. The first increase in minimum wage took place on July 1, 2016.

LANE COUNTY MINIMUM WAGE INCREASE

2016	\$9.75
2017	\$10.25
2018	\$10.75
2019	\$11.25
2020	\$12.00
2021	\$12.75
2022	\$13.50

The Oregon Employment Department made a conservative estimate of the number of jobs affected by the minimum wage increase by looking at how many jobs paid at or below the new minimum wage level in the second quarter of 2015. During that time period, approximately 19,725 jobs paid at or below the new minimum wage scale in Lane County. This number is expected to increase due to the job growth in Lane County.

DEMOGRAPHICS

The 2015 population estimates indicate that Lane County is the fourth-most populous county in Oregon and the third-most populous metropolitan statistical area (MSA) after the Portland and Salem areas. The county's 362,150 residents are concentrated within

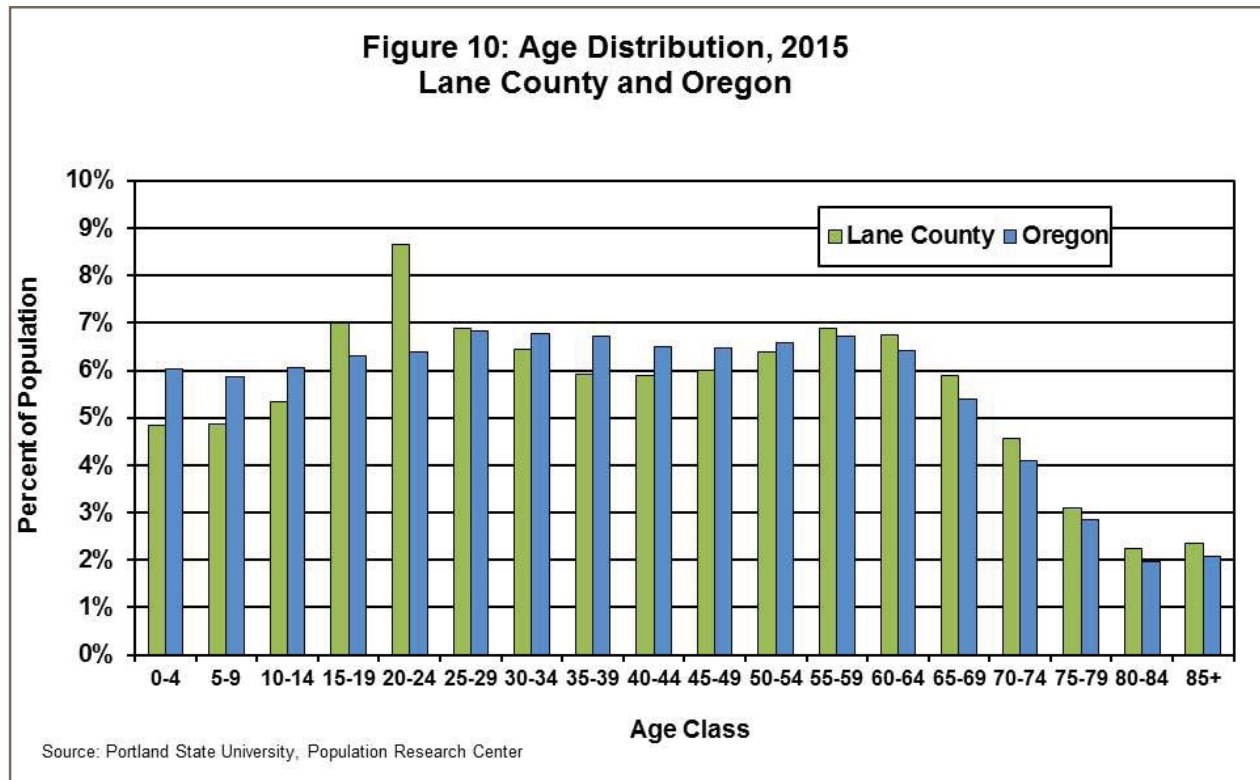
a relatively small region around the Eugene and Springfield urban area. Sixty-nine percent of the county's residents live in incorporated cities within a 30 mile radius of Eugene, largely along Interstate 5. The remainder of Lane County's population is located in rural areas including the corridor between Florence and Dunes City on the Pacific Coast, and the Oakridge area in the Cascade foothills. Lane County's population grew 3 percent between 2010 and 2015 compared to 4.8 percent statewide, ranking it the 18th fastest.

Long-term projections indicate that the county's population will continue to increase but the rate of growth will remain below the projected statewide growth rate. According to forecasts by the Oregon Department of Administrative Services, Office of Economic Analysis, the total increase in Lane County's population in the 20-year period between 2010 and 2030 is expected to amount to 58,237 people, or 17 percent compared with 24 percent growth statewide.

AN AGING POPULATION

The age distribution of Lane County's population has a higher proportion of its population in the young-adult (20-29) age group. The higher concentration of young adults can be easily explained by the fact that the University of Oregon and Lane Community College enroll thousands of out-of-county people.

The statewide and county age distributions have two distinct high points, the age group that include 45 to 64 year olds and the age group that include 15 to 34 year olds (Figure 10). The former represents the baby-boom generation and the latter, the millennials. While baby boomers are reaching retirement age, the millennials are in the early stages of their working years. The result may be a temporary skill shortage as more people retire than there are skilled people to replace them. How serious this skill gap will become is uncertain. Either



way, the aging of the baby boomers should create opportunities for younger people who develop the right skills and education.

Among the working age population, aging trends are driven by the baby boom generation – those born between 1946 and 1964. In 1970, before most baby-boomers entered the workforce, the share of the 45 to 64 year olds of the working-age population was approximately 27 percent. As young workers entered the workforce, the working-age population became much younger, with the 45 to 64 age group falling to a little over 20 percent of the working-age population. As the baby-boom generation has aged, so has the workforce. The share of the 45 to 64 age group rose to 28 percent of the working age population by 2010. It is expected to decline again and then increase slightly to 23 percent by 2040.

Although the millennials and in-migration will help lower the share of those ages 45 to 64 in the working age population and help close any skill or labor gaps that develop, the overall

aging of the population will have an impact on the economy. As the baby-boomers age, there is expected to be more demand for health care services and leisure and hospitality services. Additionally, there may be labor shortages in several industries due to more workers exiting the labor force than entering as the market recovers.

PARTICIPATION RATES

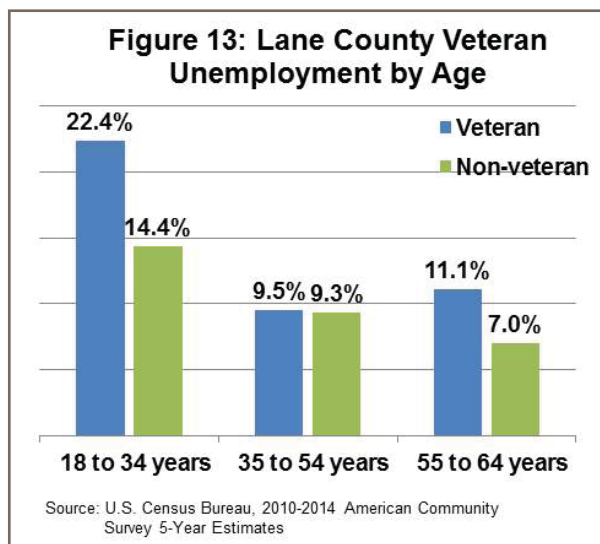
In addition to population trends, labor force participation rates – the percentage of population working or actively looking for work may affect labor and skill availability. National trends show a steady drop in younger workers' (ages 16 to 24) labor force participation, dropping from 68.1 percent in 1980 to 55 percent in 2015 (see Figure 11 on the next page).

The drop in younger workers is similar in Lane County, especially among teenagers. The share of Lane County residents ages 16 to 19 who are working or looking for work fell in the early 2000s and reached an historic low of 32 percent in 2012. This age group rebounded somewhat to 38 percent in 2014. The youth participation rate is still well below the 57 percent labor force participation rate for the total population over 16 years old in 2014 (see Figure 12 on the next page). In contrast, older workers' labor force participation has been on the rise. For workers age 55 and older, the participation rate has increased from 32.8 percent to 40 percent, potentially due to economic need and better health in retirement years.

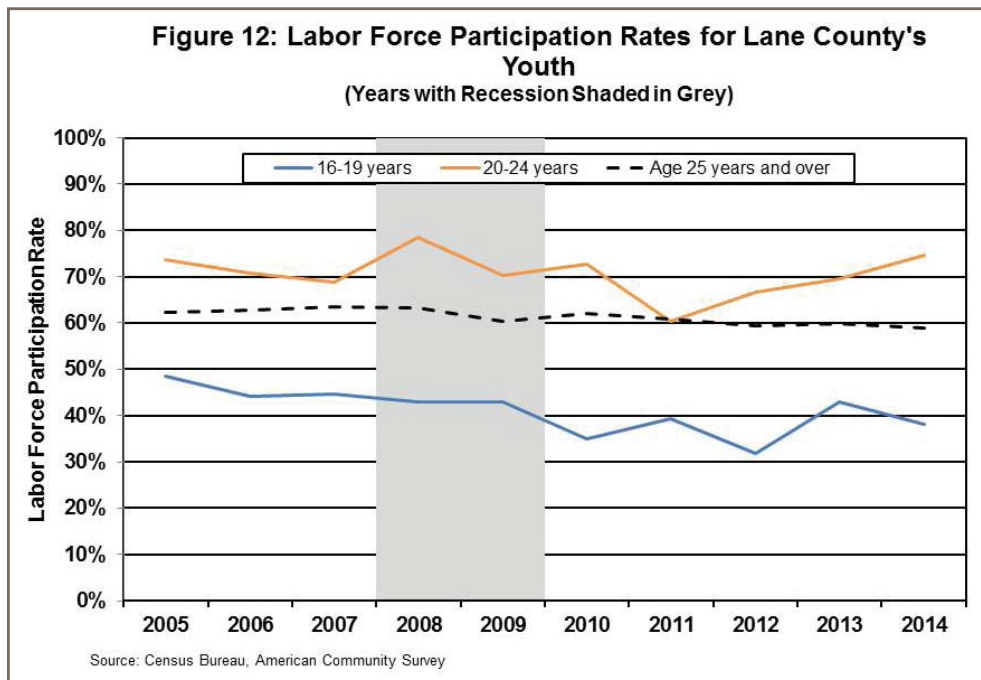
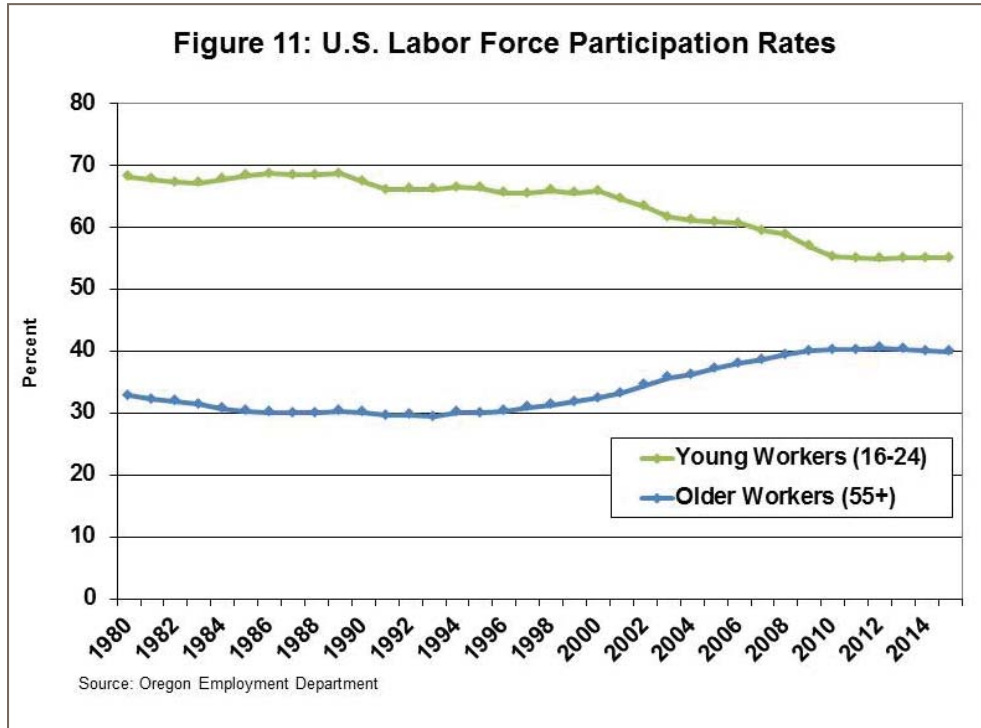
Industries that have high proportions of older workers may experience labor or skill shortages in the coming years. In 2015, at the broadest industry level, many working-class industries have over half of their workers in the 45 and higher age group including: logging and forestry (58 percent), mining—mostly sand and gravel (58 percent), manufacturing (50 percent), transportation and warehousing (63 percent), and utilities (58 percent). Construction is close at 46 percent of its workforce in that age group. Professional occupations with over half of their workers in this age group include: real estate (55 percent), education (58 percent), health care and social assistance (49 percent), management of companies and enterprises (50 percent), and public administration (57 percent).

LANE COUNTY VETERANS LABOR FORCE DATA

According to the U.S. Census Bureau's 2010-2014 American Community Survey, veterans in Lane County consistently have higher unemployment rates than non-veterans, especially younger (Gulf War Era II) veterans and older (Vietnam era) veterans. In Lane County, younger veterans unemployment is 22.4 percent compared to 14.4 percent for non-veterans (Figure 13). Assisting veterans with workforce training and education along with skills transferability is a main focus of WorkSource Lane staff.



LANE WORKFORCE PARTNERSHIP



SECTOR-BASED STRATEGIES

Sector work is embedded in Lane Workforce Partnership's (LWP) practices. Staff use sector-based approaches to respond to the ever-changing industry needs in the community. LWP is committed to working with business, industry, and community partners to solve workforce challenges.

The Lane County Sector Strategy Team (LCSST) convened for the first time in November 2014. The team is made up of regional workforce development, economic development, and city and business leaders. Utilizing local labor market data, the LCSST has identified the following industries as targeted sectors for the next several years: High Tech, Food and Beverage, Advanced Manufacturing, Mining and Construction, and Health Care. Figures 14 and 15 demonstrate that these target industries not only have above average wages for Lane County but they have a high growth forecast as well.

Over 36 percent of jobs on the high-wage high-demand jobs list for Lane County are in targeted sectors, with the majority of them

FIGURE 14: LANE COUNTY SECTOR AVERAGE ANNUAL PAY, 2015

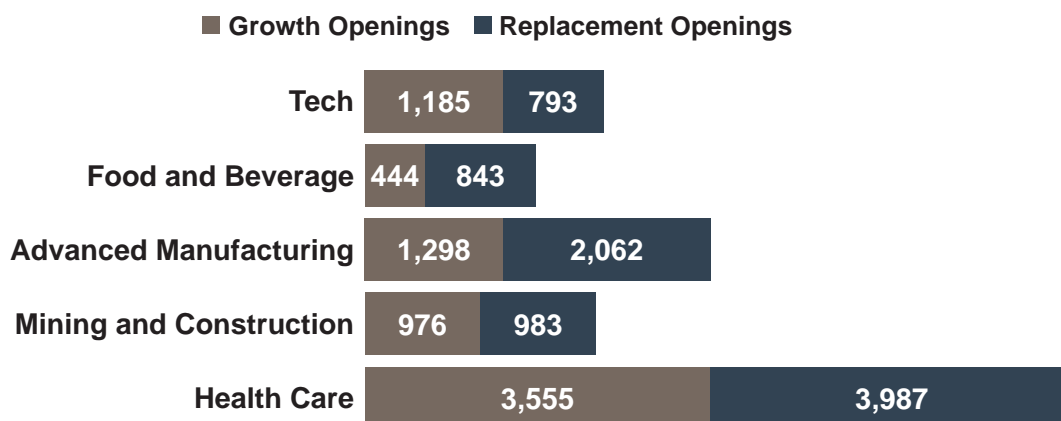
TECH.....	\$74,368
FOOD AND BEVERAGE.....	\$42,293
ADVANCED MANUFACTURING.....	\$54,182
MINING AND CONSTRUCTION.....	\$40,241
HEALTH CARE.....	\$52,490
LANE COUNTY AVERAGE.....	\$40,802

Source: Oregon Employment Department

being in health care and manufacturing. These jobs include: software and web developers, computer systems analysts, physicians assistants, nurse practitioners, carpenters, electricians, construction equipment operators, machinists, welders, and industrial machinery mechanics.

Sector strategy work goes beyond simply asking the local business community about workforce needs. The LCSST explores all challenges

Figure 15: Projected Job Openings in Lane County's Target Sectors, 2015



Source: Oregon Employment Department

LANE WORKFORCE PARTNERSHIP

that stand in the way of industry growing and thriving in Lane County. To date, the LCSST has convened industry professionals in the Tech Sector and the Food and Beverage Sector. The responses from the local industry resulted in the following task teams:

TECH SECTOR TASK TEAMS

- Creating business driven curriculum in local colleges.
- Improving the quality of K-12 education.
- Increased internet speed in downtown Eugene.
- Improving downtown image and safety in Eugene and Springfield.
- Improving air travel options in and out of the region.
- Branding and marketing of Lane County as a top tech community.

FOOD AND BEVERAGE SECTOR TASK TEAMS

- Develop shared resources for local industry to help start-up businesses, keep and grow existing businesses, and attract new businesses.
- Create awareness and recognition through coordinated branding efforts.

- Build a stronger workforce — aligning curriculum at local high schools and colleges; raise awareness of food and beverage careers.
- Smooth utility costs — increase awareness of utility assistance programs and utility costs.
- Streamline regulations and permitting.
- Increase collaboration across the industry.

A significant amount of work has already been accomplished through both the Tech Sector and Food and Beverage Sector task teams. The LCSST will continue to convene and will soon bring together the Advanced Manufacturing and Mining and Construction industry.

Through sector work, LWP is working to strengthen the local workforce for these industries to ensure business have the skilled workforce necessary to innovate and grow, and that workers and jobseekers in the county have the skills to take advantage of employment opportunities in these industries.



Photo courtesy of Lunar Logic

TECH SECTOR

Table 7: Lane County Tech Sector Employment Forecast

2014	2024	# Growth	% Growth	Replacements	Total Openings
4,233	5,418	1,185	28.0%	793	1,978

Source: Oregon Employment Department

The Tech Sector in Lane County includes roughly 400 firms in industries like software publishing, data processing services, and electronic manufacturing. Together, these firms employed 4,418 workers in 2015 and contributed almost \$329 million in covered payroll.

Trends show that, like most sectors, the Tech Sector in Lane County lost jobs during the Great Recession, dropping from an annual average of 5,658 jobs in 2007 to 4,002 in 2012 for a loss of 1,655, or 29 percent. After 2012, the sector grew, gaining roughly 520 jobs by 2014 from a variety of manufacturing, software, and computer service firms. In 2015, the sector lost about 100 jobs. This was due to layoffs at Symantec, however these job losses were countered by new and expanding tech firms.

Within the Tech Sector, software publishing is the largest industry and has a strong employment concentration, 5.2 times the U.S. concentration and even greater compared to Oregon.

At the industry level, Tech Sector wages are high. In 2015, the average annual wage was

\$74,368 compared to \$40,824 for all industries in Lane County.

At the occupational level, the most common occupations in the industry show a combination of highly paid technical occupations and generally lower paid office personnel. Table 8 shows the most common occupations in the Tech Sector along with average annual wages.

The Oregon Employment Department forecasts the tech sector will grow by 28 percent in Lane County between 2014 and 2024, compared to 11 percent for all industries (Table 7). Growth is helped by the published addition of a new Broadcom computer chip plant and several new and expanding firms. This will equate to an additional 1,185 tech sector jobs. In addition, there is expected to be 793 openings created through replacement needs equaling roughly 1,980 total openings or an average of 198 openings per year.

In early 2015, the Technology Association of Oregon (TAO) established a Southern Willamette Valley office. Since then, TAO has taken on the role of convener for the Lane County Tech Collaborative. Since its inception in February 2015, the Tech Collaborative has been tackling issues identified by the local tech industry. Six task teams were formed, two of which deal directly with workforce training and education — creating business-driven curriculum in local colleges and improving the quality of K-12 education.

According to TAO, the availability of qualified talent in our region continues to be the biggest limiting factor to even greater growth in the tech sector. In September of 2016, there were more than 200 active job openings identified in a survey of local tech companies. New

LOCAL RESPONSES TO TECH WORKFORCE NEEDS:

Investments: From 2014–2016, LWP has invested \$11,850 in scholarships related to high tech careers and an additional \$63,000 in on-the-job training contracts with local high tech employers. Through the Regional Innovation Training Funds, LWP invested \$50,000 to Hop Skip Mobile for the development of data science curriculum.

Table 8: Lane County Employment in the Tech Sector – Most Common Occupations

Occupational Title	2014 Employment	Average Annual Wages
Computer and Information Systems Managers	86	\$97,070
Software Developers, Applications	353	\$85,598
General and Operations Managers	102	\$83,653
Computer Systems Analysts	90	\$76,191
Architects, Except Landscape and Naval	108	\$63,526
Network and Computer Systems Administrator	103	\$62,839
Computer Occupations, All Other	90	\$62,182
Computer Network Support Specialists	83	\$59,086
Computer Programmers	93	\$58,195
Business Operations Specialists, All Other	85	\$56,224
Sales Representatives, Services, All Other	108	\$48,621
Social Science Research Assistants	95	\$44,390
Computer User Support Specialists	277	\$43,747
Market Research Analysts and Marketing Specialists	129	\$42,891

Source: Oregon Employment Department

programs like Talent Match and Experience Oregon Tech, both of which Lane Workforce Partnership was a founding partner in, are increasingly important to bring together job seekers with the many local opportunities.

Connected to these programs there are several emerging efforts to strengthen the talent pipeline. Connected Lane County, a regional education and workforce development consortium, is working with TAO to expand access to career technical education (CTE) courses in software engineering and programming in secondary education. It is envisioned that in-classroom learning will be complemented with applied learning opportunities through tech industry partnerships.

In the summer of 2016, the Oregon Talent Council awarded a grant to the University of Oregon for Project OnRamp. The University of Oregon now joins globally recognized programs such as Stanford,

MIT, and UC Berkeley all of whom have recently started to offer Internet of Things (IoT) and data science curriculum coupled together. “It’s fantastic to see this in-demand talent being developed in our own backyard. The greater Eugene tech community has responded very positively by creating new internships and targeted scholarships, reflecting industry’s commitment to increasing diversity in tech,” said Matt Sayre, Director of the Technology Association of Oregon.



Photo courtesy of IDX, LLC

FOOD AND BEVERAGE SECTOR

Table 9: Lane County Food and Beverage Sector Employment Forecast

2014	2024	# Growth	% Growth	Replacements	Total Openings
3,360	3,804	444	13.2%	843	1,287

Source: Oregon Employment Department

The Food and Beverage Sector is a traded sector that includes both manufacturers and wholesalers. It is important to Lane County as a growth industry and was one of the few industries along with health care to weather the Great Recession without major losses. Between the end of the recession in 2010 and 2015, the number of firms grew from 125 to 144 and employment grew from 2,907 to 3,572.

Going forward, the sector is expected to add 444 additional jobs by 2024 for a 13.2 percent growth rate compared to 11 percent for all industries (Table 9). In addition, there are expected to be 843 replacement openings. Total job openings will reach 1,287 over the 10-year period.

Unlike many areas, wages are higher in the Food and Beverage Sector in Lane County compared to overall industry wages. In 2015, the Lane County average annual wage in

the Food and Beverage Sector was \$42,293 compared to \$40,802 for all industries. Statewide, wages in this sector are somewhat less than the average for all industries. In Lane County, many firms in the food and beverage manufacturing portion of the sector produce specialized products such as organic food and craft beer as opposed to large food processors, helping to push wages higher.

Educational requirements for the Food and Beverage Sector are relatively low (Table 10). Nine out of the 10 of the largest occupations require a high school diploma or less, yet employers in the industry report having difficulty hiring and keeping workers.

The Lane County Food and Beverage Collaborative is currently tackling many issues facing the local industry. During the convening of the Lane County Food and Beverage industry, the issue of an inadequate workforce

was expressed by several companies. Employers struggle to find reliable and adequately trained employees. According to Wildtime Foods Co-owner, Whit Hemphill, “the challenge has primarily been in finding people with the sort of long-term potential benefitting our investment in training and wages.” Wildtime Foods has increased wages and benefits for employees in order to retain and attract



Photo courtesy of Wildtime Foods

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good workers. However, Whit has noticed “it simply takes a higher number of applications and interviews than in years past to find that right person.”

Additionally, work in the Food and Beverage Sector is often seasonal which can discourage potential workers from pursuing careers in the industry. As a result, a task team from the Food and Beverage Collaborative is working on an employee sharing program that would allow employees to secure year-round employment.

Such a program would keep a qualified workforce from leaving the area in pursuit of year-round employment in the industry and prevent employers from continuously paying the high costs of training associated with employee turnover.

Table 10: Lane County Top Food and Beverage Occupations and Entry Level Education

Occupational Title	2014 Employment	Typical Entry Level Education
Packaging and Filling Machine Operators and Tenders	216	High school diploma or equivalent
Driver/Sales Workers	207	High school diploma or equivalent
Food Mixing and Blending Machine Operators and Tenders	167	High school diploma or equivalent
Wholesale and Manufacturing Sales Representatives, Except Technical and Scientific Products	167	High school diploma or equivalent
Bakers	157	Less than high school
Laborers and Freight, Stock, and Material Movers, Hand	141	Less than high school
Truck Drivers, Heavy and Tractor-Trailer	140	Postsecondary training (non-degree)
Waiters and Waitresses	112	Less than high school
Shipping, Receiving, and Traffic Clerks	104	High school diploma or equivalent
Slaughterers and Meat Packers	101	Less than high school

Source: Oregon Employment Department

LOCAL RESPONSES TO FOOD AND BEVERAGE WORKFORCE NEEDS:

Future Workforce: LWP continues to partner with the Eugene City Club and Lane ESD to offer the Lane County Employment and Economy class. This ten week series involves local companies offering in-depth tours to area educators. The 2017 series will focus on local food and beverage manufacturers.

Investments: From 2014-2016, LWP has invested \$189,000 in on-the-job training contracts with local food and beverage employers.

ADVANCED MANUFACTURING SECTOR

Table 11: Lane County Manufacturing Sector Employment Forecast

2014	2024	# Growth	% Growth	Replacements	Total Openings
8,593	9,882	1,298	15%	2,062	3,360

Source: Oregon Employment Department

Advanced manufacturing includes manufacturers that use innovative technology to improve products and processes or produce innovative products. In Lane County, advanced manufacturing is a growing sector with higher than average wages. The 10-year projected growth rate is 15 percent compared to 11 percent for all industries with significant replacement openings due to retirements. This growth includes many higher paying technical occupations.

Wages are generally high in the advanced manufacturing sector. The 2015 annual average wage for the sector in Lane County was \$54,182 compared to the overall average of \$40,802 for all industries. Table 12 shows the top growth occupations within Advanced Manufacturing in Lane County.

The Oregon Employment Department forecasts that the sector will grow by 15

percent between 2014 and 2024, adding 1,298 new jobs. In addition, there are expected to be 2,062 openings due to replacement needs, for a total of 3,360 openings.

Wood product manufacturing remains, by far, the most prominent subsector within the Advanced Manufacturing Sector. In 2015, Lane County wood products manufacturing had about eight times more employment concentration than the U.S. and two times more than Oregon. Veneer, plywood, and engineered wood product manufacturing is still the largest Lane County employer in wood products manufacturing with employment numbers at 1,667 in 2014. While plywood and engineered wood manufacturers represent the largest employer, the employment concentration for these employers is third (20 times more than the U.S. in 2015) for the area behind hardwood and softwood veneer (50 and

27 times the concentration) and engineered wood (54 times the concentration than the US in 2015). Ten-year employment projections for wood products manufacturing show a 15 percent growth in Lane County into 2024.

Lane County machinery manufacturers are diverse, with the strongest concentration of employers in agriculture, construction, and mining machinery, industrial machinery for sawmills, and material



LANE WORKFORCE PARTNERSHIP

handling equipment. The employment for machinery is more concentrated in Lane County than in the U.S., with employment concentration of 1.5. There were 1,687 people employed at 45 businesses in 2015.

While manufacturing jobs are more skilled than in the past, they sometimes only require a high school education, on-the-job training, and good work ethic. Despite this, there is a challenge for local manufacturers to recruit appropriate candidates to fill open positions. Manufacturers need to recruit the next generation of workers to fill the skill gaps they will face as the current workforce retires.

According to Avril Watt, Human Resources Manager for JCI, Inc., “with an aging workforce

the concern that we can find and hire replacements is real, and that’s just to maintain status quo. Manufacturing can offer some great career paths for high school graduates and, at JCI, we have begun a Career Development Program as a means to do this.” JCI, Inc. is taking a multi-faceted approach to attracting the next generation of manufacturing workers. The company offers tours to area high schools, participates in school-to-work events like Lane County Manufacturing Career Day, and supports Career Technical Education in local schools. Avril believes “it really is going to take a combination of all of these activities and more to help us solve the workforce shortage.”

Table 12: Lane County Top Advanced Manufacturing Growth Occupations

Occupational Title	2014 Employment	Average Annual Wages
Welders, Cutters, Solderers, and Brazers	391	\$40,070
Wholesale and Manufacturing Sales Representatives, Except Technical and Scientific Products	237	\$50,944
Supervisors and Managers of Production and Operating Workers	216	\$51,680
General and Operations Managers	214	\$88,012
Industrial Machinery Mechanics	211	\$49,113
Computer-Controlled Machine Tool Operators, Metal and Plastic	183	\$41,001
Machinists	163	\$42,723
Inspectors, Testers, Sorters, Samplers, and Weighers	143	\$41,764
Electrical and Electronic Equipment Assemblers	98	\$58,454
Computer Programmers	94	\$57,527

Source: Oregon Employment Department

LOCAL RESPONSES TO MANUFACTURING WORKFORCE NEEDS:

Building a Pipeline: Lane Workforce Partnership collaborated with the Eugene Area Chamber of Commerce, Lane ESD, and Lane Community College for the inaugural Lane County Manufacturing Career Day. Over 40 high school students were given the opportunity to have hands-on exposure to manufacturing careers and education opportunities

Investments: From 2014–2016, LWP has invested \$10,420 in scholarships related to high tech careers and an additional \$211,000 in on-the-job training contracts with local manufacturing employers. Through the Regional Innovation Training Funds, LWP has invested over \$40,000 in Advanced Manufacturing LEAN Training between 2014 and 2016.

MINING AND CONSTRUCTION SECTOR

Table 13: Lane County Manufacturing Sector Employment Forecast

2014	2024	# Growth	% Growth	Replacements	Total Openings
6,298	7,362	1,064	16.9%	983	2,047

Source: Oregon Employment Department

Mining and construction are two closely related industries in Lane County that have been combined into a single sector. Almost all mining employment in Lane County is local sand and gravel companies that produce construction aggregate.

There are three official types of work in the construction industry: construction of buildings, heavy engineering, and specialty trades. Most of the employment and business in Lane County is in specialty trades such as masonry and cement, followed by construction of buildings (3,367 and 1,574 respectively).

Like most industry sectors, the mining and construction sector has seen growth following losses during the great recession. After bottoming out in 2011 at 5,618, employment has grown 1,073, or 19 percent, to reach 6,691 in 2015.

Mining and construction is expected to grow faster than the overall economy growing at 16.9 percent between 2014 and 2024 for 1,064 jobs, compared to 11 percent for all industries (Table 13). In addition, there are expected to be 983 replacement openings and 2,047 total openings over the ten-year period. Even with above average growth, employment does not reach pre-recession levels, which peaked in 2007.

Annual average wages in mining and construction are higher than the overall average for all industries at \$48,793 compared to \$40,802. In 2015, Lane County's total payroll in construction and mining was \$298,082,815, the third highest in the state.

Even though wages are higher on average than for all industries, most occupations in mining and logging require a only a high school diploma or less for the typical entry level position, providing good paying jobs at lower educational levels (Table 14).

The industry faces some challenges due to an aging workforce with 47 percent of its workers over the age of 45. The majority of the skilled workers are being lost and, according to local employers, it is difficult to attract younger workers who are more interested in high-tech rather than



Photo courtesy of Delta Sand and Gravel

Table 14: Lane County Top Mining and Construction Occupations and Entry Level Education

Occupational Title	2014 Employment	Typical Entry Level Education
Carpenters	682	High school diploma or equivalent
Electricians	415	High school diploma or equivalent
Construction Laborers	338	Less than high school
Office Clerks, General	322	High school diploma or equivalent
Operating Engineers and Other Construction Equipment Operators	289	High school diploma or equivalent
Plumbers, Pipefitters, and Steamfitters	265	High school diploma or equivalent
Cost Estimators	241	Bachelor's degree
Painters, Construction and Maintenance	220	Less than high school
Roofers	218	Less than high school
Supervisors and Managers of Construction Trades and Extraction Workers	208	High school diploma or equivalent

Source: Oregon Employment Department

construction. Additionally, a tightening labor market means employers struggle to find employees, especially in companies with specialized occupations and construction.

In 2016, a consortium of Lane County mining and construction businesses joined forces to offer a six-week training to expand the number of Commercial Driver's License (CDL) operators in the county. According to Kathy Neckels with Delta Construction Co. "the help of the Regional Innovation Training Funds

through Lane Workforce Partnership has given us the opportunity to fill skilled positions that are not easy to recruit for."

LOCAL RESPONSES TO MINING AND CONSTRUCTION WORKFORCE NEEDS:

Aligning Education and Industry: Currently LWP is working with the local construction-aggregate industry to identify and problem solve workforce issues and improve connections with Lane County high schools and Lane Community College.

Mining an Emerging Workforce:

Plans are underway for local business reps to visit with high school students and instructors to promote the mining and construction sector and paths to employment opportunities.

Investments: From 2014–2016, LWP has invested \$55,425 in scholarships related to mining and construction careers and an additional \$53,700 in on-the-job training contracts with local mining and construction employers. Through the Regional Innovation Training Funds, in 2016, LWP invested \$49,000 in CDL training through a consortium of local sand and gravel businesses.

HEALTH CARE SECTOR

Table 15: Lane County Manufacturing Sector Employment Forecast

2014	2024	# Growth	% Growth	Replacements	Total Openings
18,200	21,800	3,600	20%	4,000	7,600

Source: Oregon Employment Department

Health care is a large and growing sector in Lane County. Lane County is a regional center for health care in Oregon and, as a result, some services are consumed by patients outside the county. The Health Care Sector's concentration of employment is slightly higher than the nation. Health care is forecasted to have employment growth at a rate of 20 percent between 2014 and 2024.

Data for the Health Care Sector includes both health care and social assistance industry. Health care makes up the overwhelming majority at this industry level. The Health Care Sector had 1,173 firms that employed 20,840 people in 2015. Payroll in Lane County equaled \$1,068,781,456 in 2015 for the Health Care Sector, second only to Portland.

Health care is the only sector that did not drop during the recession. Job opportunities in the health care industry continue to grow, with high-paying jobs spanning the entire educational requirement spectrum. The 2015 annual average wage for health care and social assistance is \$48,112 compared to \$40,802 for all industries.

Fifty-six percent of the jobs in the health care industry are in high-wage, high-demand occupations. Among the top high-wage high-demand occupations in health care are: physician assistants, physical therapists and assistants, nurse practitioners, medical and clinical laboratory technologists, and registered nurses (Table 16).

Like most of the sectors targeted as having workforce needs, health care has an aging

workforce. About 48 percent of Lane County workers in health care are 45 years of age and older. The older workforce contributes to the need for replacement openings. There are expected to be 4,000 replacement openings between 2014 and 2024 (Table 15). When combined with growth openings, there are expected to be 7,600 total openings over the 10-year period.

According to Phil Hohnstein of Pinnacle Healthcare “the post-acute and long term care profession is confronting the graying of America on two fronts. The need for services is evolving and the workforce is changing – both are creating new challenges for providers. Developing and adopting best strategies to accommodate the needs and interests of older workers is one challenge. Another challenge is the often conflicting needs and interests of younger, replacement workers. Flexibility is an important strength in today's healthcare sector.”

In addition to the changes brought about by the Affordable Care Act and state-level initiatives, health care is undergoing dramatic shifts in terms of its workforce needs. There is more focus on patient engagement and empowerment, health promotion, disease prevention, population health, team-based care among providers, and coordinated care across health care organizations. These shifts are changing how care is delivered, resulting in workforce fluctuation. There is a shift to less intensive care, earlier intervention, and coordinated care.

Table 16: Lane County Top Health Care Growth Occupations

Occupational Title	2014 Employment	Average Annual Wages
Registered Nurses	2,803	\$82,139
Personal Care Aides	1,424	\$23,664
Medical Assistants	971	\$33,471
Nursing Assistants	1,477	\$29,863
Medical Secretaries	1,177	\$36,447
Dental Assistants	385	\$39,426
Maids and Housekeeping Cleaners	379	\$22,822
Physicians and Surgeons, All Other	307	\$203,516
Dental Hygienists	347	\$81,959
Home Health Aides	259	\$23,799
Physical Therapists	242	\$91,246
Receptionists and Information Clerks	225	\$28,616
Medical and Health Services Managers	253	\$104,878
Cooks, Institution and Cafeteria	236	\$24,718
Billing and Posting Clerks	168	\$35,977
Mental Health Counselors	187	\$49,823
Surgical Technologists	168	\$51,482
Physician Assistants	100	\$101,352
Radiologic Technologists	197	\$66,384
Dentists, General	166	\$222,938

Source: Oregon Employment Department

LOCAL RESPONSES TO HEALTH CARE WORKFORCE NEEDS:

Partnership with Local Employers: WorkSource Lane partnered with PeaceHealth to help fill 30 open CNA 2 positions in Lane County. Of those 30 individuals, 14 only had CNA 1 certifications. PeaceHealth invested in these individuals by paying for the CNA 2 classroom training. Upon certification, those 14 individuals were enrolled in the On-The-Job Training Program.

Investments: From 2014–2016, LWP has invested \$66,500 in scholarships related to health care careers and an additional \$81,600 in on-the-job training contracts with local health care employers.

FUTURE FOCUS

Lane Workforce Partnership staff and board are all looking towards the future. Being flexible and responsive to the needs of the local business community is a key focus in the 2016-2020 Strategic Plan. Lane Workforce Partnership is making training investments that support work being accomplished through our sector strategies team and support middle-wage job development and creation.

CONNECTING YOUTH TO EMPLOYMENT OPPORTUNITIES

In its 2016-2020 Strategic Plan, the LWP Board of Directors has set the goal to prepare youth for future employment. One strategy for meeting this goal is to increase awareness of career opportunities within Lane County. LWP has a long history of supporting school-to-career activities. Plans are underway for local business representatives to visit with high school students and instructors to promote the mining and construction industry and paths to employment opportunities. In 2015 and 2016, LWP staff coordinated tours of the mining and construction industry for high school students. Additionally, in 2016, LWP partnered with the Eugene Area Chamber of Commerce, Lane ESD, and Lane Community College to put on the first Lane County Manufacturing Career Day.

LWP is supportive of expanding Career and Technical Education (CTE) programs in Lane County. Connected Lane County is currently working with the Technology Association of Oregon, local tech companies, and high schools throughout Lane County to create new CTE courses in software engineering and computer programming. Data shows that CTE students have a higher high school graduation rate (90 percent) than the national average (80 percent). In addition, 78 percent of students who participate in CTE programs enroll in full-time, postsecondary education within two years of high school graduation.¹

Youth work experience opportunities are another way that LWP is working to prepare Lane County's youth for future employment. Work experience provides many benefits to young workers including building a foundation for future employment, developing "soft" skills that are valued by employers, and money in their pocket. Between 2014 and 2016, LWP has invested in 233 youth work experience placements. LWP is currently exploring non-federal funding opportunities to increase the number of youth work experience placements. Each placement costs approximately \$3,500.

ADDRESSING BARRIERS TO EMPLOYMENT AND TRAINING

Another goal in the 2016-2020 LWP Strategic Plan is expanding the use of services and increasing job placements for under-represented populations, including: women, minority groups, those over 50, veterans, people with disabilities, offenders, and rural communities.

The cost of child care continues to be a huge barrier to employment in Lane County, particularly for women. The average monthly cost of child care in Lane County for a family with one infant and one preschooler is \$1,029.² For many low-income households, quality child care is out of reach financially. In many cases, this results in one parent leaving the labor force. LWP continues to partner with United Way of Lane County and Family Connections of Lane and Douglas Counties in an attempt to find a solution to the high cost of quality child care in Lane County.

In 2016, LWP was awarded a Linking to Employment Activities Pre-Release (LEAP-2) grant from the Department of Labor. The \$500,000, two year grant will build stronger partnerships between Lane County Jail, Lane County Parole and Probation, Lane County Council of Governments, Lane Community

LANE WORKFORCE PARTNERSHIP

College, Sponsors Inc., and WorkSource Lane to offer workforce services pre-release while affording a smooth workforce service transition, post-release for 180 individuals that are incarcerated in the Lane County Jail.

CREATING AN ENTREPRENEURIAL ECOSYSTEM

LWP is helping to create jobs and increase the tax base by investing in an entrepreneurial ecosystem in Lane County. Since 2014, LWP has made targeted investments in Fertilib Thinkubator's ID8 Pre-Accelerator training through the Regional Innovation Training Fund. Through this training, 40 new jobs have been created in Lane County.

Lane Workforce Partnership, Springfield Economic Development Agency, Eugene Economic Development Agency, and Lane County Economic Development Agency have joined forces to create a request for proposal for Entrepreneur Training Funds. Up to \$230,000 will be awarded to assist with the training for startup/entrepreneurial businesses in Lane County. These funds will support efforts to work with Lane County residents to develop innovative ideas while strengthening the private sector workforce in order to increase productivity, keep Lane County businesses viable and competitive, and offer new skills and opportunities to Lane County's businesses and entrepreneurs.

In 2016, LWP secured \$250,000 in Lay-Off Aversion funds to pilot a two-year project in Lane County that will assist existing businesses with stabilization, business model transformation, and lay-off aversion strategies. LWP will work with the Regional Innovation Accelerator Network (RAIN) in Eugene to hire 2-3 business

experts that are well versed in starting and growing businesses in a rapidly changing and technology dependent economy. This new program will operate as the Sustainability Hub of Interchange Negotiation Experts (SHINE).

SUPPORT FOR BUSINESS

As LWP moves ahead through the workforce systems transformations identified in WIOA, it will continue to implement effective sector strategies, support innovative training programs, and foster strong partnerships across Lane County. As the Local Workforce Board for Lane County, LWP will continue to use labor market information and business input to help direct public workforce investments toward talent development, job creation, business competitiveness, and expanded opportunities for citizen prosperity.

¹<http://careertech.org/sites/default/files/CTE-Student-Achievement.pdf>

²<http://unitedwaylane.org/images/ul/Files/ALICE%20in%20Lane%20County.pdf>



Photo courtesy of Palo Alto Software

LANE WORKFORCE PARTNERSHIP BOARD MEMBERSHIP



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CELESTE MARSHALL
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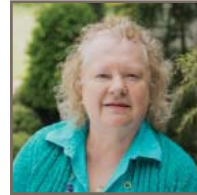
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STATE OF THE WORKFORCE
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2016

STATE OF THE
WORKFORCE REPORT

THE COLUMBIA-WILLAMETTE WORKFORCE COLLABORATIVE

Working together to support and develop regional talent.



ABOUT THE COLUMBIA-WILLAMETTE WORKFORCE COLLABORATIVE

The Columbia-Willamette Workforce Collaborative is a partnership between the Clackamas Workforce Partnership, Workforce Southwest Washington (formerly the Southwest Washington Workforce Development Council) and Worksystems: the three Workforce Development Boards covering the Portland-Vancouver Metropolitan Area. The Collaborative delivers a unified approach to serving industry, supporting economic development, and guiding public workforce training investments to better address the needs of our combined labor shed.

ACKNOWLEDGEMENTS

We are committed to providing and using high quality information to support the region and guide investments. Much of the data in this report was provided by the Oregon Employment Department and the Washington Employment Security Department, key partners in the region's workforce development system. We are dedicated to assuring this information is regularly updated and presented in a way that advances the region's capacity to understand and align regional workforce supply with regional business demand.

This report examines the “**state of the workforce**” within the greater Portland-Vancouver region. The report aims to understand the balance between workforce supply and industry demand. Ideally, the workforce should be closely aligned with the economy, and the supply of workers and skill levels should approximate industry needs. Perfect alignment is not easy to achieve because it requires a dynamic balance between social, economic and demographic factors influenced by local, national and global trends. However, understanding where misalignments exist is critically important as we shape policy, consider investments, and implement strategies to improve the quality of the regional workforce.

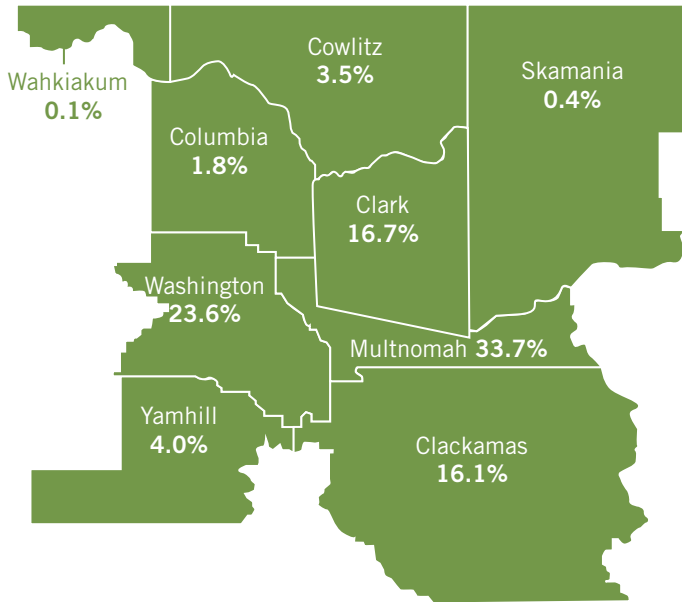
We are fortunate to live in a beautiful, dynamic and forward-looking place. From microbrews to microchips, we’re known the world over for our capacity to innovate. The region’s labor force is the 23rd largest and among the fastest-growing in the nation. Health care provides the region’s highest concentration of private-sector jobs followed closely by manufacturing. Small businesses dominate the private sector landscape with 95.8% of regional private-sector firms employing fewer than 50 people. 38.9% of regional workers have a bachelor’s degree or above compared to 35.1% nationwide. The diversity of the region is on the rise with people of color representing 35.7% of the region’s population growth since 2000.

The Great Recession took a toll on our region and a complete jobs recovery was only achieved 2.5 years ago. We’ve now moved well beyond recovery and into a period of rapid expansion, the pace of which is rivaling the heydays of the mid-1990s and not expected by most economists. In addition, income growth is strong with spending power the best it’s been in decades.

Our recent success means employers are increasingly having difficulty finding enough qualified workers and skill shortages are once again a pressing regional issue. **Helping local workers prepare for the region’s growing economy and helping businesses find qualified workers is essential to the health of our regional economy.** We also know that many in our region do not have the skills necessary to participate in these thriving economic times and are struggling to make ends meet. To a large extent, the strength of our workforce and its ability to meet the needs of industry will determine whether we can sustain this growth in the years ahead.

The Columbia-Willamette Workforce Collaborative – comprised of the three Workforce Development Boards covering the Portland-Vancouver region – understands that workforce development, economic development and education are the cornerstones of a prosperous community. Heightened efforts to align workforce supply with industry demand are essential, and these efforts are strengthened when we work together to bridge the gap between disciplines, resources and jurisdictions.

2015 REGIONAL LABOR FORCE: 1,257,700



Regional labor force has increased

12.2%

since 2000.

The Portland Metro Area had the **fastest growing labor force** in the country from April '15 – April '16.

MAJOR EMPLOYERS AND NUMBER OF EMPLOYEES

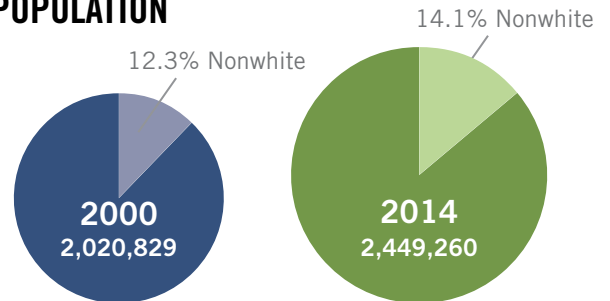
Intel Corp 18,600	Wells Fargo 4,527
Providence Health & Services 16,139	Portland State University 3,418
Oregon Health and Science University 14,963	U.S. Bank 3,757
Kaiser Permanente Northwest 11,898	Beaverton School District 4,637
Legacy Health System 8,700	PeaceHealth Southwest Washington Medical Center 4,446
Fred Meyer Stores 10,813	Portland Community College 3,906
City of Portland 5,481	Vancouver School District 3,300
Nike Inc. 8,500	Evergreen School District 3,292
Portland Public Schools 6,135	U.S. Postal Service 3,533
Multnomah County 5,995	Daimler Trucks North America 3,000
	Clackamas County 2,181

MEDIAN EARNINGS FOR YEAR-ROUND, FULL-TIME WORKERS

	2000	2014
Portland Metro Area*	\$35,502	\$48,589
Longview Metro Area	\$35,095	\$40,801
United States	\$32,098	\$43,545

*data unavailable for the Greater Portland Region

POPULATION



Hispanic population grew by **90%**.

EDUCATION



38.9%

of the workforce has a Bachelor's Degree or above.

AGE

20.1% of the region's workforce is age 55+, with the majority employed in:

Health Care & Social Assistance (private and public)	34,474
Manufacturing	29,093
Education Services (private and public)	25,936

A strong economy requires a skilled workforce. The 21st century labor market is demanding increasingly higher skills requiring education and training beyond high school. The State of Oregon has set an ambitious goal for educational attainment called **40-40-20** which calls for 40% of adults to hold a bachelor's degree or above, 40% to hold an associate's degree or meaningful post-secondary credential and all adults to have a high-school diploma (the remaining 20%). Washington State has adopted **Results Washington**, a plan to increase the attainment of certificates, credentials, apprenticeships and degrees from 72,997 (June 2014) to 149,000 by 2023. Setting aside the specific goal numbers, this signals a strong emphasis on middle-skill jobs which is a primary area of focus for the public workforce system in our bi-state region.

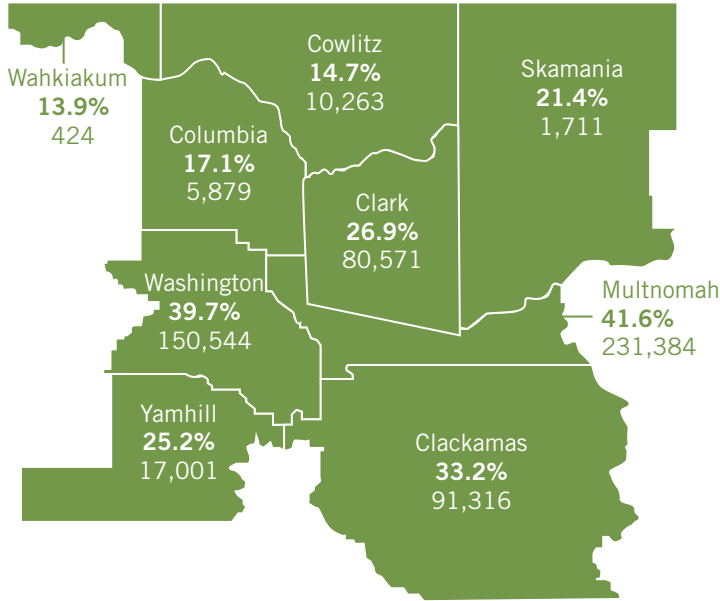
The percent of people in the region with a bachelor's degree or higher has climbed to nearly 35%, up from 28% in 2000. The region's higher education landscape contains more than 35 institutions, including 5 community colleges and an array of private and public organizations supporting a broad mix of disciplines and degrees. High school graduation rates are also climbing with nearly 77% of students now completing within 4 years.

Despite this, more than 2,500 youth drop out of high school every year and only 32% of regional 11th graders are at or above college or career readiness in math. More than 37% of community college students require remediation before pursuing college level work which has a negative impact on post-secondary completion. **Working with our partners in education to improve student success and degree attainment remains a key goal of our regional workforce efforts.**

Working together to find creative ways to engage and incent current adult workers to pursue and complete educational and industry recognized credentials is an important component of the region's workforce efforts. Focusing on training to prepare job seekers for middle-skill jobs is key to our strategy with an emphasis on occupations within our four target sectors of Advanced Manufacturing, Health Care, IT/Software and Construction. New online training platforms will expand access to training and hopefully bolster completion rates.

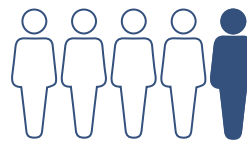
Oregon and Washington have also adopted the National Career Readiness Certificate (NCRC), a portable credential that demonstrates achievement and a level of workplace readiness skills in applied mathematics, locating information and reading for information. Demonstrating the value of the NCRC to regional employers is critical to the initiative's success. As more employers use the NCRC to inform hiring and promotional decisions, it is hoped that more workers will pursue getting a certificate and/or improving their skills.

PEOPLE AGE 25+ WITH A BACHELOR'S DEGREE OR HIGHER: 2014



Fields of Bachelor's Degree for Population Age 25+: 2014

Science, Engineering and Related Fields	47.3%
Arts, Humanities and Other	26.5%
Business	16.3%
Education	9.9%



ONE IN FIVE

workers today are near or at retirement age.

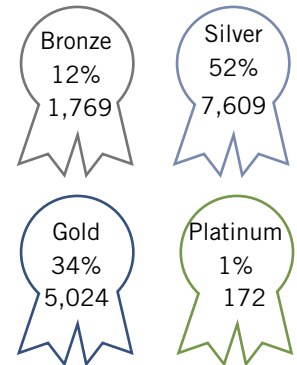
UNIONIZATION

16% of the metro area's workers are union members, up slightly from 2000 (15%).

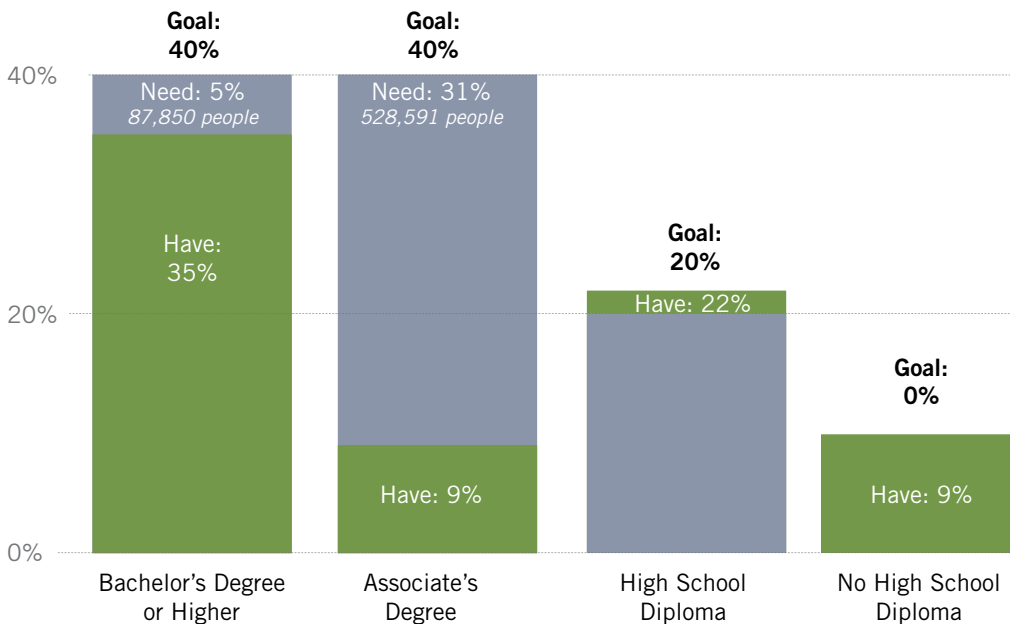
H-1B Visas

3,125 certified H-1B visas in 2015.

National Career Readiness Certificates



OREGON'S 40-40-20 GOAL



RESULTS WASHINGTON



New degrees by 2023

The Great Recession taught us a number of things about the strengths, resiliency and potential of the regional economy. Our quality of life, strong entrepreneurial and small business climate helps us continue to attract young, creative talent even in tough economic times. Our manufacturing base emerged from the downturn somewhat smaller, but in many respects more competitive than ever. We have a number of distinctive industries that show considerable promise for growth. The metro area ranks 12th (2014) in the nation for exports and is home to globally competitive companies in software, athletic and outdoor apparel, metals and high tech manufacturing.

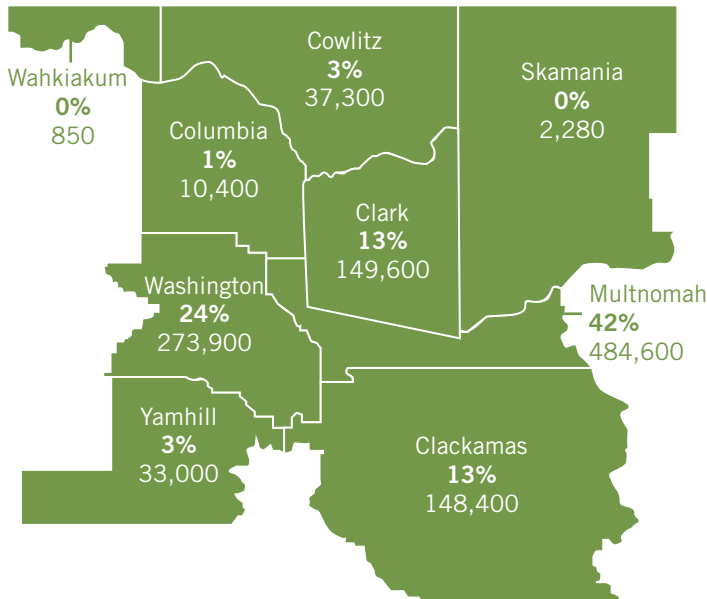
Notwithstanding these strengths, there are a number of challenges facing the region's workforce and economy. Job growth is on the rise, yet many employers are having difficulty finding qualified workers. Thousands of highly skilled workers in key industry sectors, including manufacturing, construction and health care are over 55 and will be leaving the workforce in the not too distant future. Our region's per capita income is growing slightly faster than the nation's, yet we still trail the metro portion of the U.S. (95.1%). Of the region's top 10 most prevalent occupations, just over half pay wages above \$25,000 per year and only two (Registered Nurses and General/Operations Managers) pay wages sufficient to allow a single mom with two kids to support herself and her family without requiring additional public assistance. The relocations of Under Armor and Nimble Trailers are great wins for our region, but this is tempered by recent layoffs from Intel. The region needs to continue to step up its efforts to create more wealth-producing jobs.

More than 68,000 people are unemployed in the region, yet many employers express concerns about finding qualified workers. The combination of education and experience required by regional employers increasingly does not reflect the qualifications of regional job seekers. **Addressing the mismatch between the skills of available workers and current and projected jobs is the fundamental challenge facing the region's workforce efforts.**

The challenges and opportunities facing the region point to the need for a more coordinated approach to understanding and addressing our workforce needs. Focusing on industry sectors that have a strong regional presence and potential for growth, aligning resources and strategies, fostering stronger ties between industry and training, and aligning regional economic and workforce development efforts are essential to assuring our workforce meets the needs of the evolving economy.

2015 REGIONAL JOBS: 1,140,300

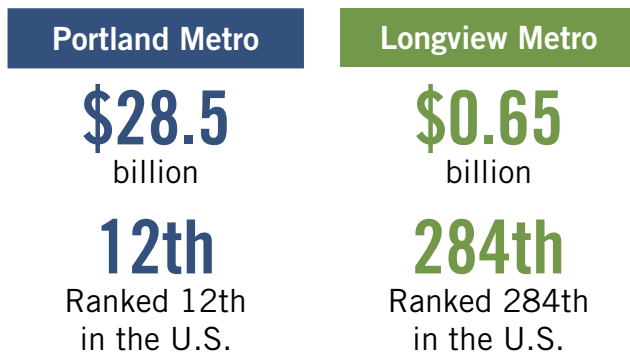
Grew **11.3%** since 2005.



10 MOST COMMON OCCUPATIONS

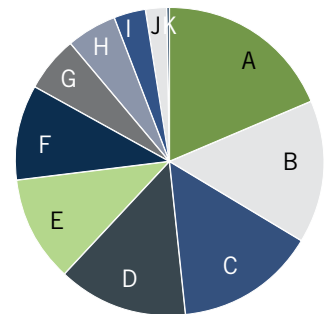
Occupation	Jobs	Median Annual Wage
Retail Salespersons	37,063	\$23,692
Cashiers	23,010	\$22,712
Combined Food Preparation and Serving Workers, Including Fast Food	20,885	\$20,097
Customer Service Representatives	19,222	\$34,626
Waiters and Waitresses	18,341	\$19,983
Registered Nurses	17,830	\$85,916*
General and Operations Managers	17,229	\$88,317*
Laborers and Freight, Stock, and Material Movers, Hand	17,079	\$26,867
Office Clerks, General	15,801	\$32,871
Cooks, Restaurant	14,682	\$23,014

*Pay a self-sufficient wage for this area.

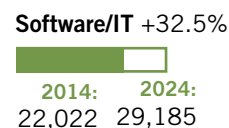
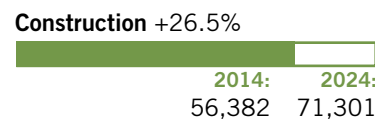
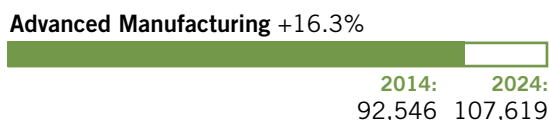


EMPLOYMENT BY INDUSTRY (PRIVATE SECTOR)

- A Trade, Transportation, and Util. 18.6% 213,700
- B Professional and Business Svcs. 15.1% 173,400
- C Educational & Health Svcs. (private) 14.6% 167,600
- D Government (includes education) 13.6% 156,400
- E Manufacturing 11.2% 128,300
- F Leisure and Hospitality 10.1% 116,200
- G Financial Activities 5.8% 66,800
- H Construction 5.1% 58,200
- I Other Services 3.5% 40,600
- J Information 2.1% 24,600
- K Mining and Logging 0.2% 2,400



EMPLOYMENT PROJECTIONS 2014-2024



All private sector industries **+18.8%**
From 944,546 to 1,122,075

Our future depends on the success of our youth. In turn, our youth are highly dependent upon our educational systems to provide the academic and foundational skills needed to thrive in the regional economy.

Achieving high levels of educational attainment has far-reaching social, cultural and economic benefits. Those with higher levels of education have lower unemployment, commit fewer crimes, require less public assistance and earn higher wages. It is estimated that increasing the number of individuals who earn a two or four-year degree by age 24 by 1 percent will boost the regional economy by more than \$1.5 billion annually.

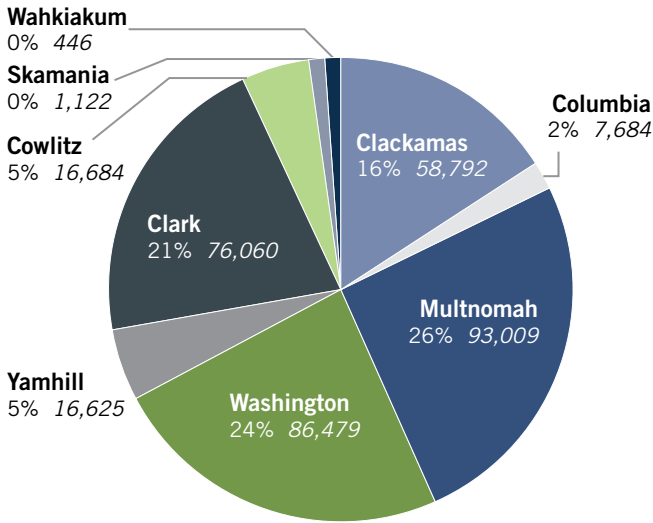
Current data shows that considerable improvement is needed to increase the educational attainment of regional youth. Academic achievement and regional graduation rates reflect significant gaps, particularly for low-income youth and students of color. The number of students identifying as Hispanic and non-English speakers at home is expected to increase by nearly 30% by the year 2030. Given changing demographics, increasing poverty and higher graduation requirements, there is an urgent need to focus efforts on improving academic performance for all regional youth.

The region continues to see an increase in the number of students entering post-secondary education. However, the rate of post-secondary completion clearly needs improvement. The number of students completing degrees indicates that students, particularly students of color, are entering programs but not completing them. In addition, the percentage of students requiring remedial education is on the rise which significantly reduces post-secondary graduation rates.

In our region, youth unemployment continues to rise – up nearly 5 percentage points from 2000. There are more than 30,000 youth ages 16-24 who are neither in school nor working representing 28% of youth in this age group who aren't in school. Knowing who may be falling through the cracks enables us to create partnerships and strategies to serve these youth and reconnect them to education and/or career track employment. We intend to use this information to inform our youth investments by focusing on strategies we know work: increasing community awareness of youth unemployment issues, providing early work experience, creating and expanding earn and learn opportunities through apprenticeships and career pathways, encouraging more cross-sector collaboration with our employer partners to build the local pipeline of workers, and focusing on career ladder employment and retention for young people. We know that youth who work are more likely to return to school, have a job in subsequent years, and earn more money over the course of their lives. They are also less likely to engage in crime and other high-risk behaviors.

Improving educational outcomes and reconnecting kids to work requires a multifaceted approach. No one system or sector can do it alone, and a range of organizations and agencies must engage to make a difference for our youth and economy.

TOTAL STUDENTS IN GREATER PORTLAND REGION: 356,901



2-Year College Graduation Rates (within 3 years)

Portland Community College	19.2%	Clackamas Community College	12.5%
Clark College	24.2%		
Mt. Hood Community College	17.7%		
Oregon and Washington			33.4%



4-Year College Graduation Rates (within 6 years)

Oregon State University	61.5%	University of Washington	81.8%
Portland State University	41.7%	Washington State University	65.5%
University of Oregon	66.5%		
Oregon and Washington			68.2%

DEMOGRAPHICS

	2000-01	2014-15	Share of 2014-15
Low Income	90,491	158,568	44.4%
Students of Color	68,916	135,385	37.9%
English Language Learners	26,429	38,857	10.9%

HIGH SCHOOL

Cohort: 27,861



Graduate in 4 years	76.6%
African American	62.6%
Hispanic	65.6%
Female	81.1%
White	79.6%

Enter college within 16 months 67.8%

YOUTH UNEMPLOYMENT



2000: 12.2%



2014: 16.8%

DEGREE BY AGE

	18-24	25-34	45-64
High School Diploma	43%	9%	31%
Some college, no degree	41%	27%	26%
Associate's degree	6%	29%	10%
Bachelor's degree	10%	26%	21%

Note: Many youth (18-24) are still pursuing their degrees, so their share of degrees, esp. Bachelor and above, will be deceptively low compared to older people

REMEDIAL EDUCATION (OREGON 2013)

Percent of Freshman Enrolling in Remedial Education

2-YEAR COLLEGE 36.8%

African American	39.6%
Hispanic	44.2%
White	41.0%

4-YEAR COLLEGE FLAGSHIP* 11.1%

African American	21.7%
Hispanic	15.2%
White	11.2%

4-YEAR COLLEGE NONFLAGSHIP 19.9%

African American	20.2%
Hispanic	25.6%
White	20.0%

*Flagship colleges are best-known institutions in the state; generally the first to be established; frequently the largest and most selective; often the most research-intensive public universities.

Note: Washington data is unavailable.

The challenges of our time can seem overwhelming. According to the most recent Census data, approximately 336,000 individuals in the region live in poverty. There are more than 68,000 people unemployed and thousands more who work full-time, but can't make ends meet because of low wages, insufficient benefits and few prospects for career advancement. Others face steep barriers to employment because of low literacy skills, criminal histories or lack of educational credentials.

Rent and property values across the region are growing at unprecedented rates. While this is good for some, far too many residents are being forced to move or, under the worst case scenario, are finding themselves homeless. On any given night, about 4,000 people sleep on the streets or in shelters across the region. More than 1,200 people engaged in the regional workforce system indicate that they are homeless. Assuring that residents facing housing insecurity have access to a broad array of services is essential and will require housing, workforce and human service providers to work together in new and innovative ways.

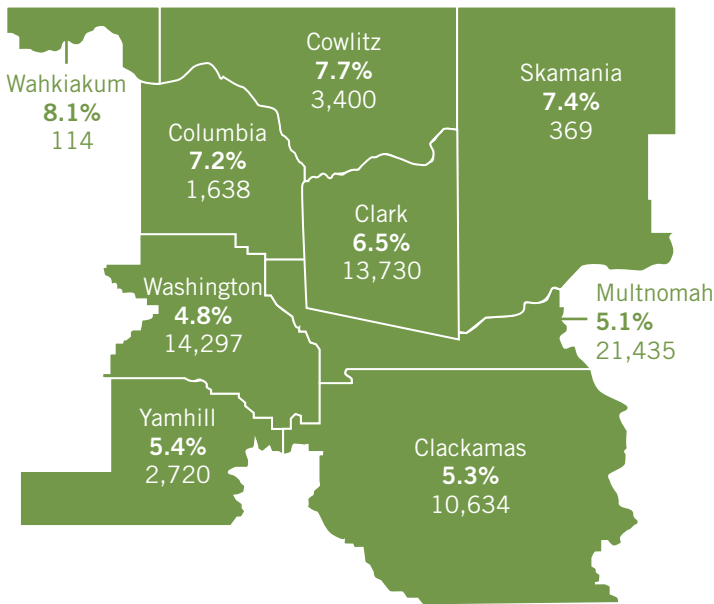
Reducing poverty is a moral and economic imperative that is essential to the health and livability of the region. From an economic perspective, a person born into poverty is much more likely to earn less as an adult and from a social perspective, is more likely to engage in criminal activity, have poorer health later in life and require more public services. Expanding the definition of workforce development to include the systematic removal of barriers – whatever those may be – is an increasingly popular and effective strategy in the fight to reduce poverty.

Our region boasts a number of proven programs and promising practices to more successfully serve low-income job seekers, including integrating basic education and occupational skills training, career pathways, vocational focused case management, and strong partnerships with education, community-based and social service organizations.

Over the last decade, the region has seen a steep decline in the primary resources available to combat poverty and move people to work. This is in large part due to the region's reliance on federal resources to support its non-education based anti-poverty and workforce efforts. Investing now to avoid paying later makes sense, but the current fiscal environment is unlikely to change any time soon. Diminishing resources and increasing need reinforces the importance of working together to address issues of poverty and supporting programs and strategies that are proven to work.

UNEMPLOYMENT RATE

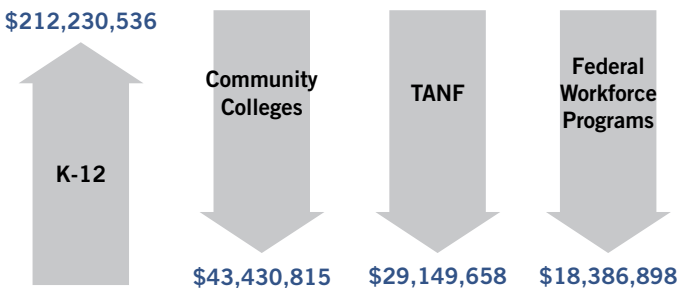
Total Unemployed 5.4% 68,337



There are
TWO UNEMPLOYED WORKERS

for every online job opening.

CHANGE IN REGIONAL EDUCATION AND WORKFORCE RESOURCES FROM 2002-2015



Note: All amounts are reported in 2015 dollars



2014 HOUSING AFFORDABILITY

Percent increase from 2012

8.7%
Median Rent

11.2%
Median House Value

21.3%
Median Home Sales Price

5.7%
Median Household Income

Portland has the **3rd lowest house vacancy rate** in the nation, and the lowest rental vacancy rate.

Since 2007, rents have increased **3X as fast** as median income (25.9% vs. 8.8%)

	2000	2014
Poverty (Individuals)	178,827 8.7%	335,960 13.9%
Public Assistance (Household)	27,347 3.5%	36,727 3.9%
Subsidized Housing (Individual)	38,900 2.0%	55,600 2.4%
	2007	2014
Food Stamps/SNAP (Households)	75,442 8.7%	155,442 14.8%

WORKING POOR



16.7%

Working full time and year round, and earning less than \$25,000/year

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POPULATION

DETAILED POPULATION GROWTH: HISTORIC AND PROJECTED

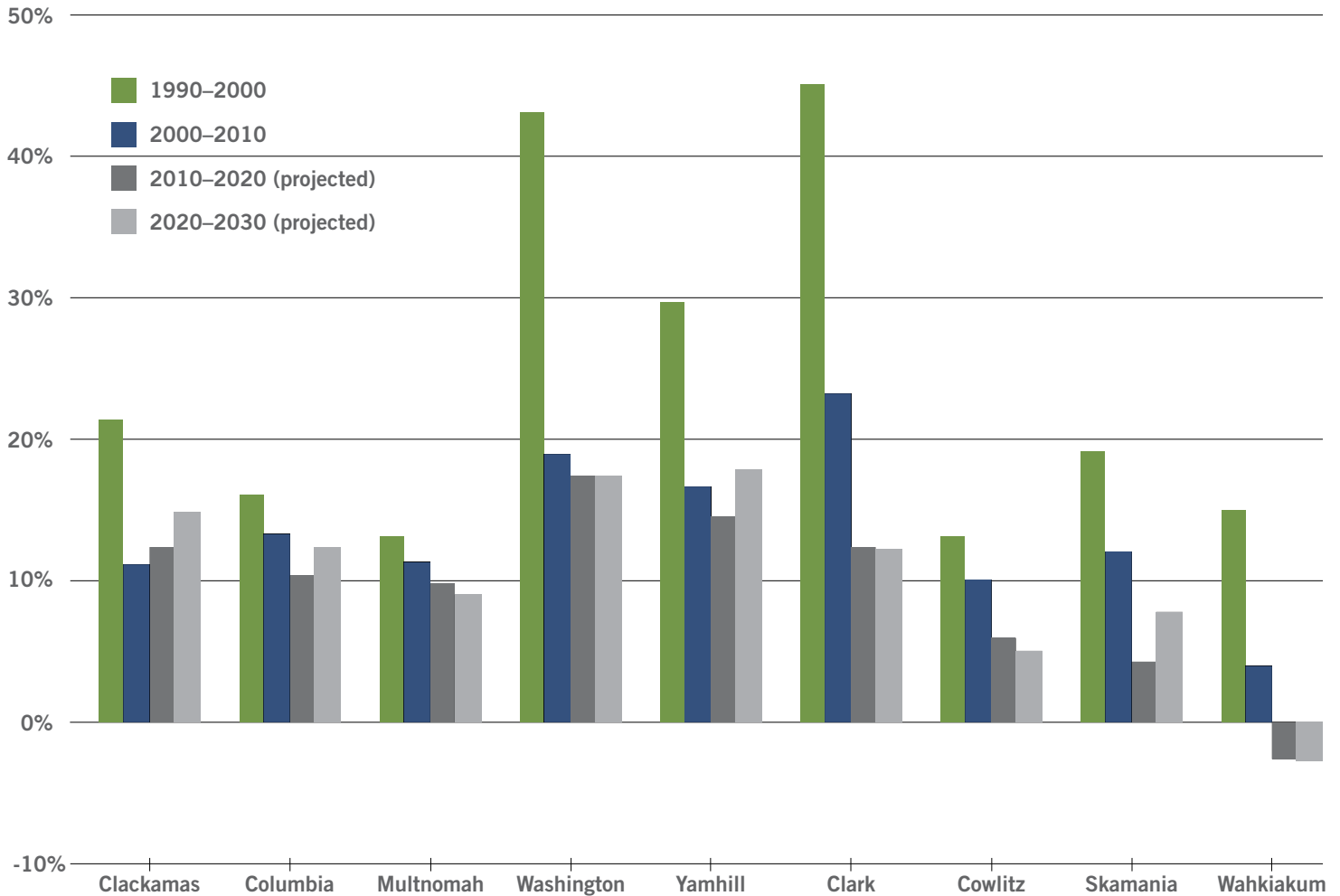
Source: U.S. Census, Oregon Office of Economic Analysis, Washington State Office of Financial Management

	Population				Projection	
	1990	2000	2010	2015	2020	2030
United States	248,790,925	281,421,906	308,745,538	320,613,696	333,896,000	358,471,000
Greater Portland Region	1,609,187	2,024,653	2,332,397	2,470,672	2,622,166	2,958,439
Clackamas	278,850	338,391	375,992	397,385	422,576	485,054
Columbia	37,557	43,560	49,351	50,390	54,517	61,273
Multnomah	583,887	660,486	735,334	777,490	807,198	879,987
Washington	311,554	445,342	529,710	570,510	622,368	731,125
Yamhill	65,551	84,992	99,193	103,630	113,611	133,907
Clark	238,053	345,238	425,363	451,820	477,884	536,717
Cowlitz	82,119	92,948	102,410	104,280	108,588	114,158
Skamania	8,289	9,872	11,066	11,187	11,548	12,447
Wahkiakum	3,327	3,824	3,978	3,980	3,877	3,772

Greater Portland Region projected to grow almost twice as fast as the nation over the next 15 years (2015-2030).

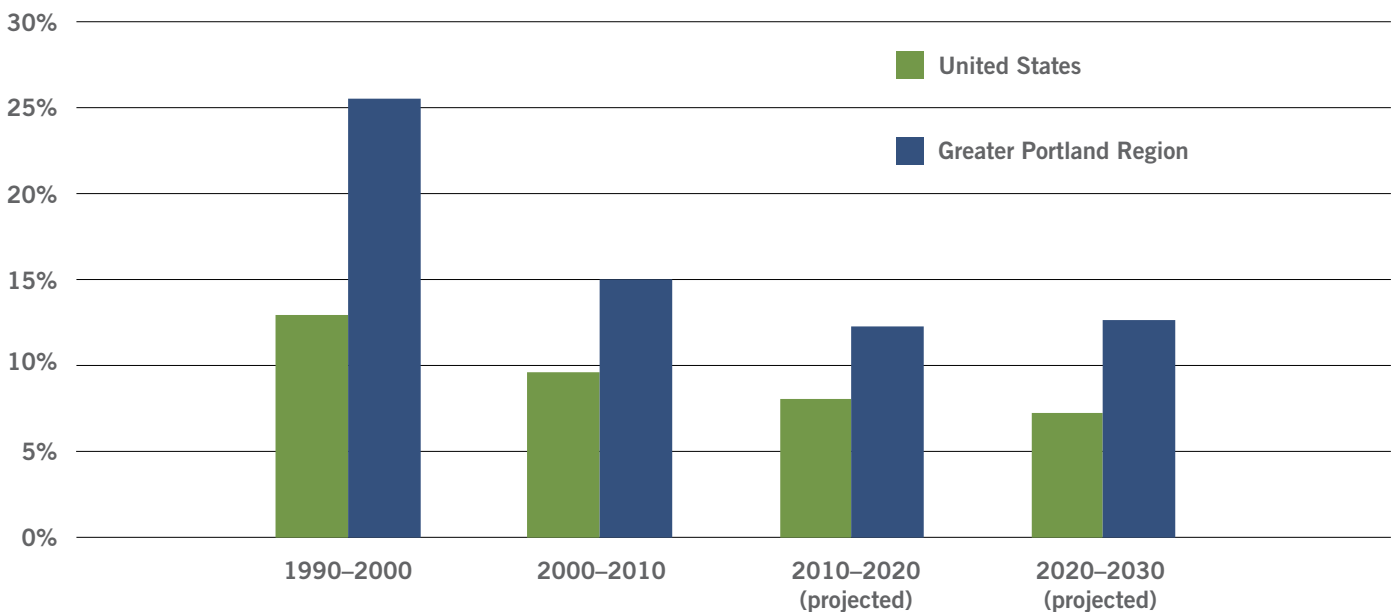
POPULATION GROWTH: HISTORIC AND PROJECTED

Source: U.S. Census, Oregon Office of Economic Analysis, Washington State Office of Financial Management



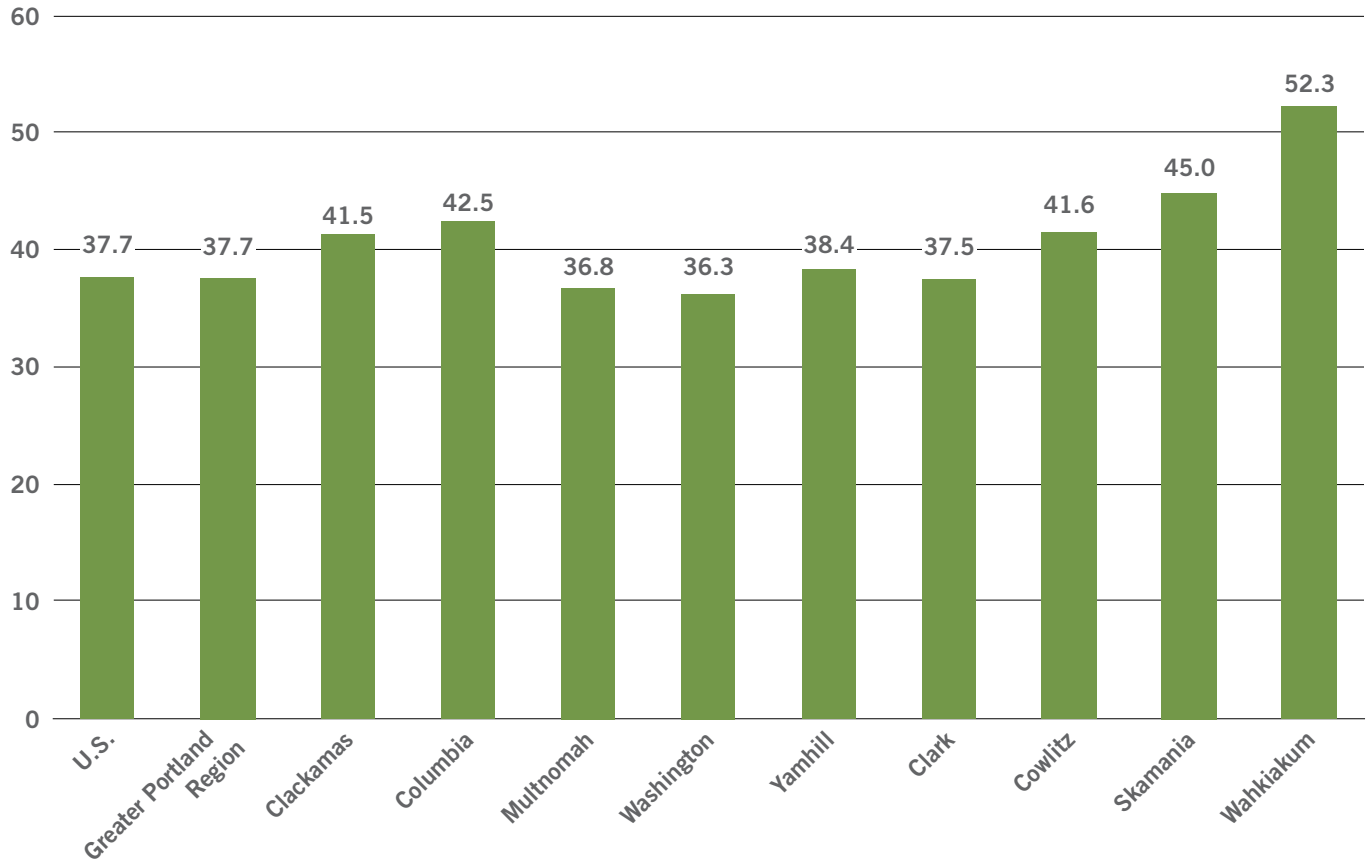
POPULATION GROWTH: HISTORIC AND PROJECTED

Source: U.S. Census, Oregon Office of Economic Analysis, Washington State Office of Financial Management



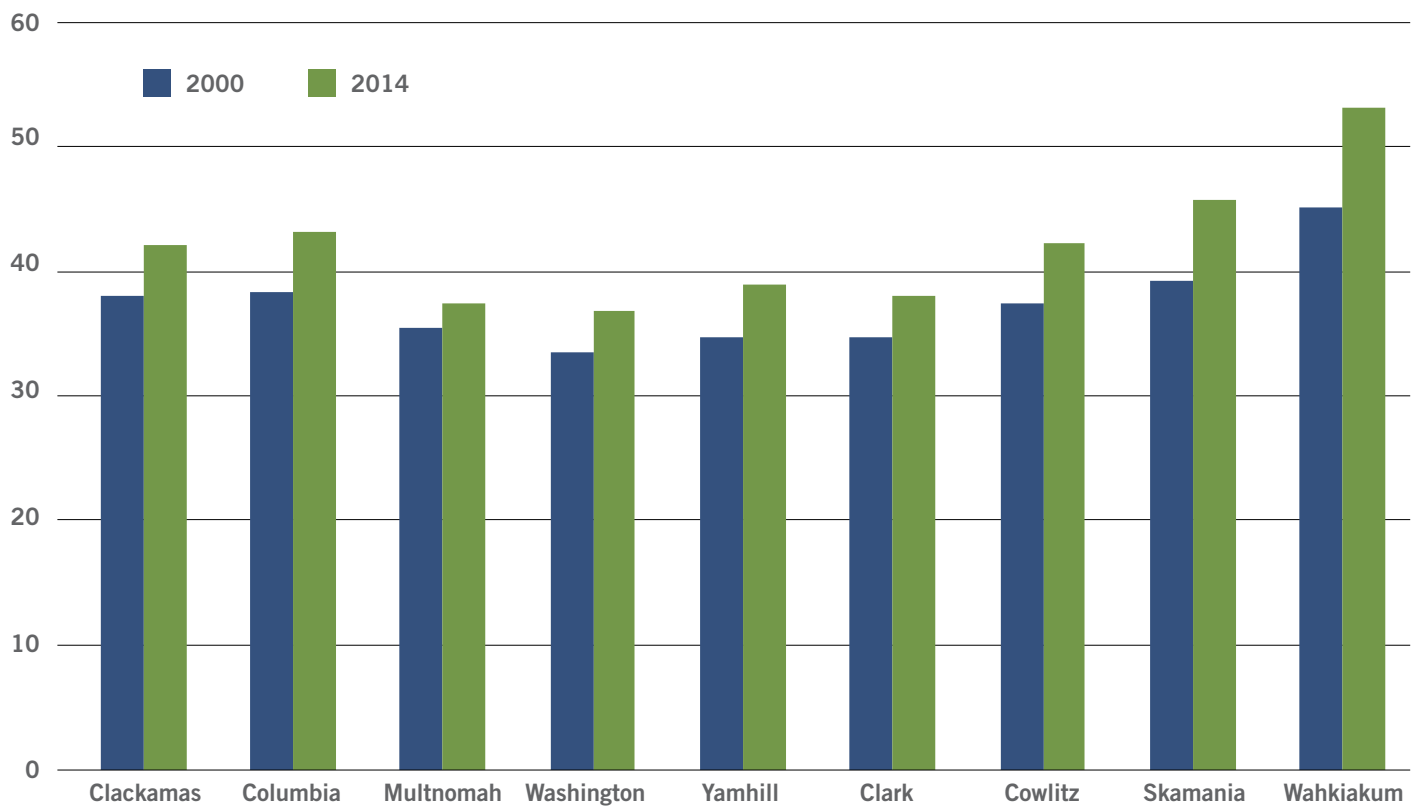
MEDIAN AGE: 2014

Source: U.S. Census



MEDIAN AGE OVER TIME

Source: U.S. Census



COUNTY POPULATION BY AGE: 2014

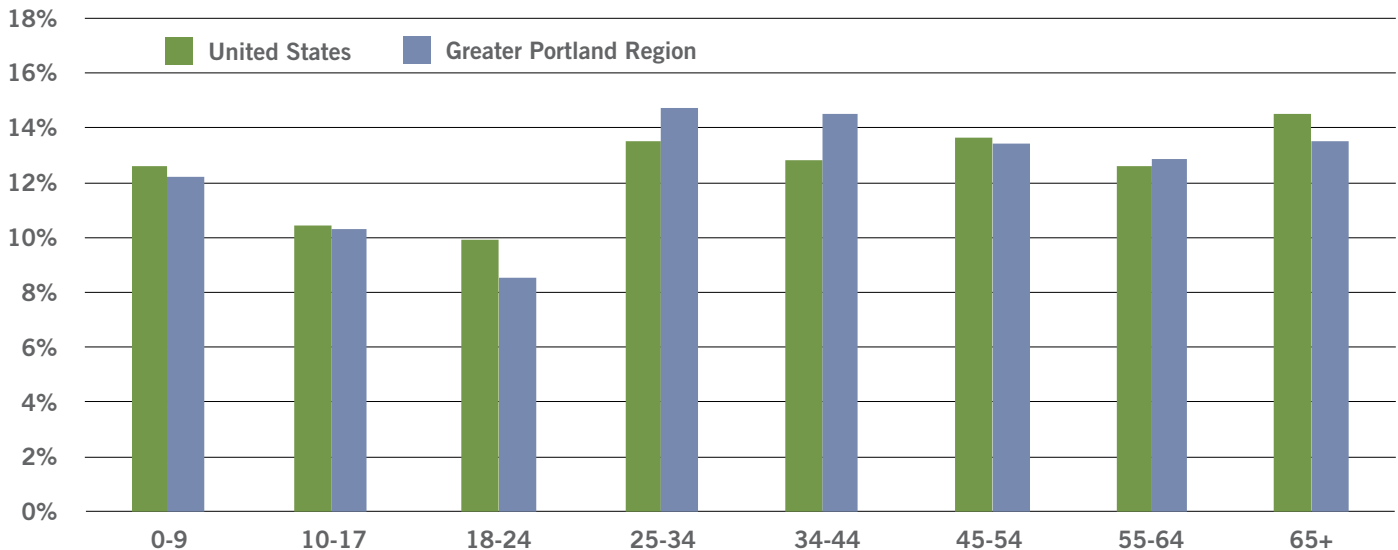
Source: U.S. Census

Population Distribution (#)									
Age Range	Clackamas	Columbia	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania	Wahkiakum
0-9	43,447	5,919	89,322	74,879	11,600	60,886	12,052	1,343	249
10-17	44,237	5,376	64,467	62,493	11,906	52,768	10,928	1,041	418
18-24	31,993	3,601	66,797	46,729	10,786	37,885	9,090	828	293
25-34	46,607	5,179	142,915	85,013	12,109	56,376	11,030	1,063	353
35-54	105,852	13,860	226,023	161,580	26,457	123,125	25,942	3,168	924
55-64	58,061	7,695	95,536	66,434	13,432	57,729	14,809	2,004	635
65+	63,985	7,645	93,205	67,560	15,569	62,239	18,282	1,757	1,137

Population Distribution (%)									
Age Range	Clackamas	Columbia	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania	Wahkiakum
0-9	11.0%	12.0%	11.5%	13.3%	11.4%	13.5%	11.8%	12.0%	6.2%
10-17	11.2%	10.9%	8.3%	11.1%	11.7%	11.7%	10.7%	9.3%	10.4%
18-24	8.1%	7.3%	8.6%	8.3%	10.6%	8.4%	8.9%	7.4%	7.3%
25-34	11.8%	10.5%	18.4%	15.1%	11.9%	12.5%	10.8%	9.5%	8.8%
35-54	26.8%	28.1%	29.1%	28.7%	26.0%	27.3%	25.4%	28.3%	23.0%
55-64	14.7%	15.6%	12.3%	11.8%	13.2%	12.8%	14.5%	17.9%	15.8%
65+	16.2%	15.5%	12.0%	12.0%	15.3%	13.8%	17.9%	15.7%	28.3%

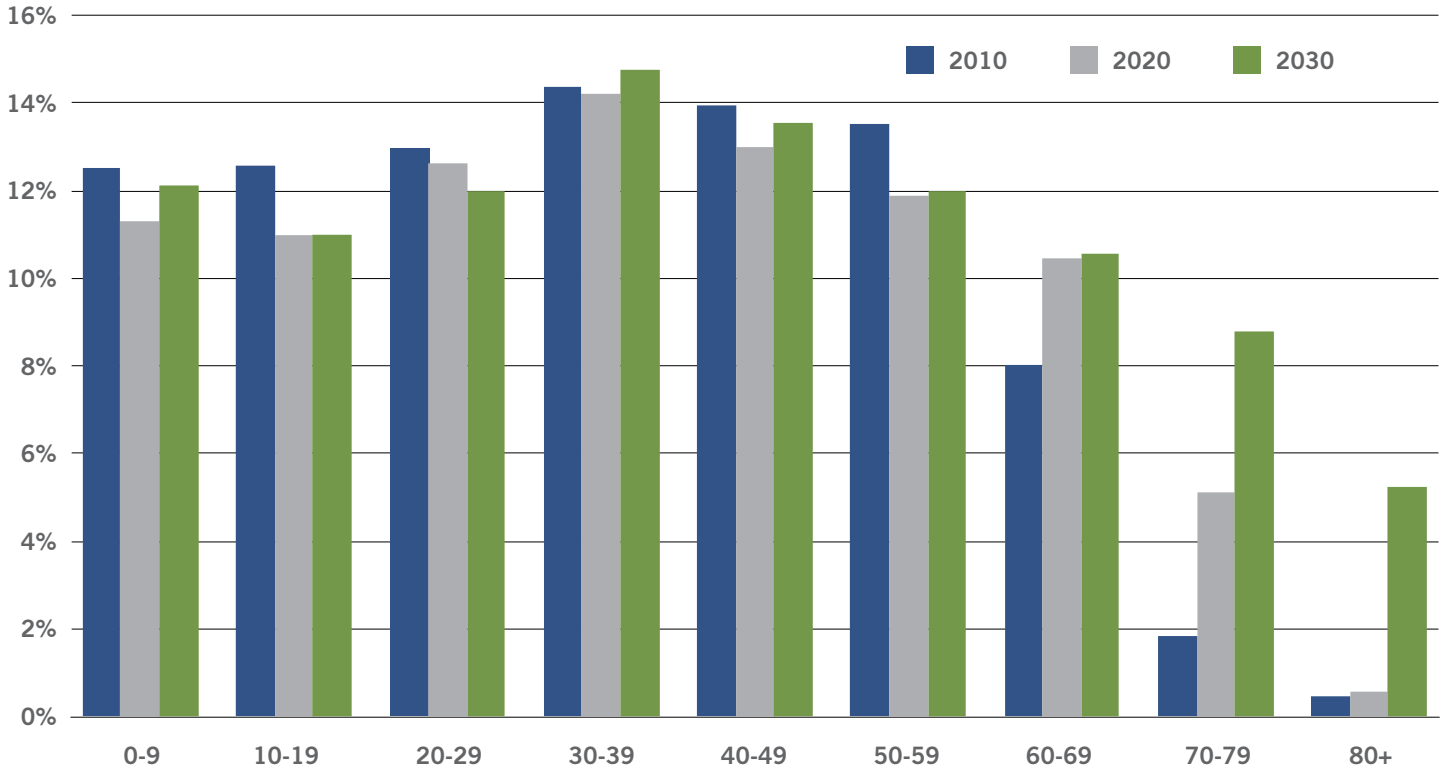
DISTRIBUTION OF POPULATION BY AGE: 2014

Source: U.S. Census



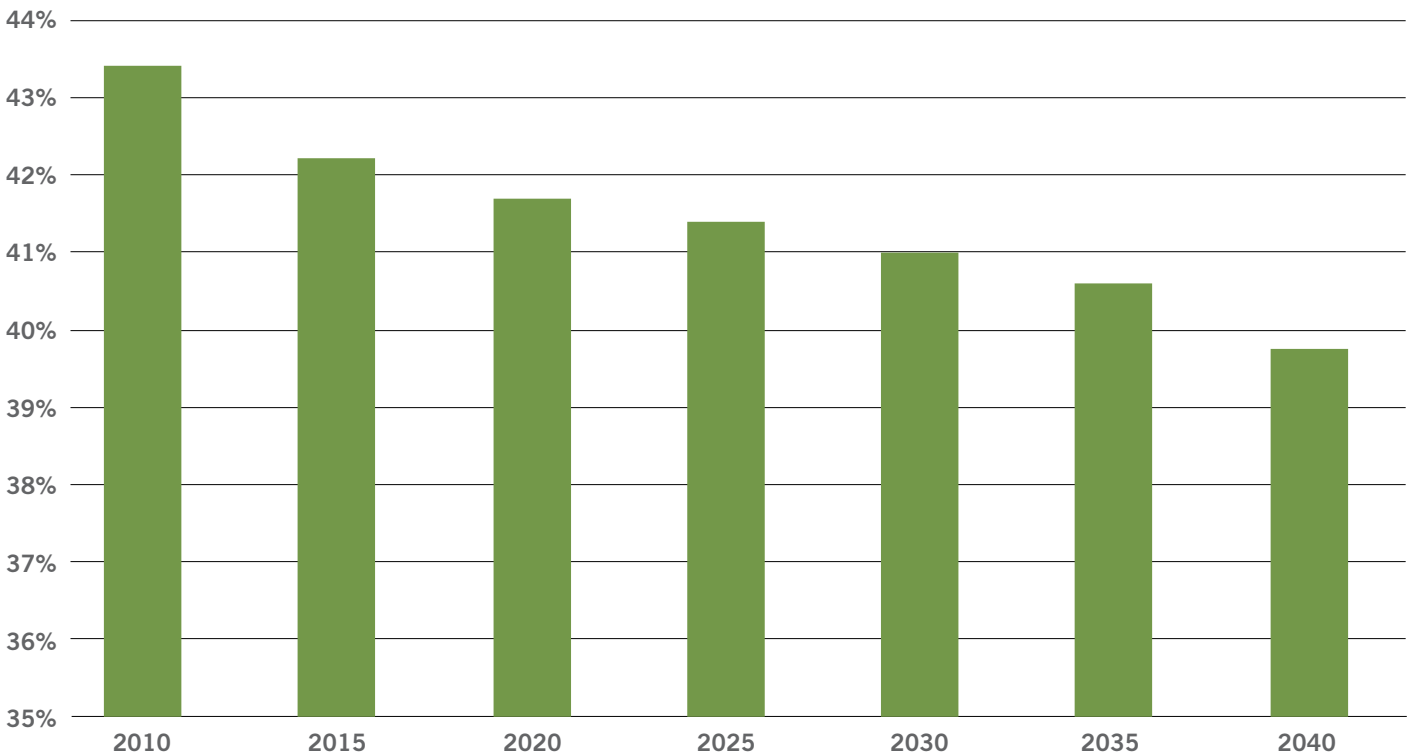
POPULATION PROJECTIONS BY AGE: GREATER PORTLAND REGION

Source: U.S. Census



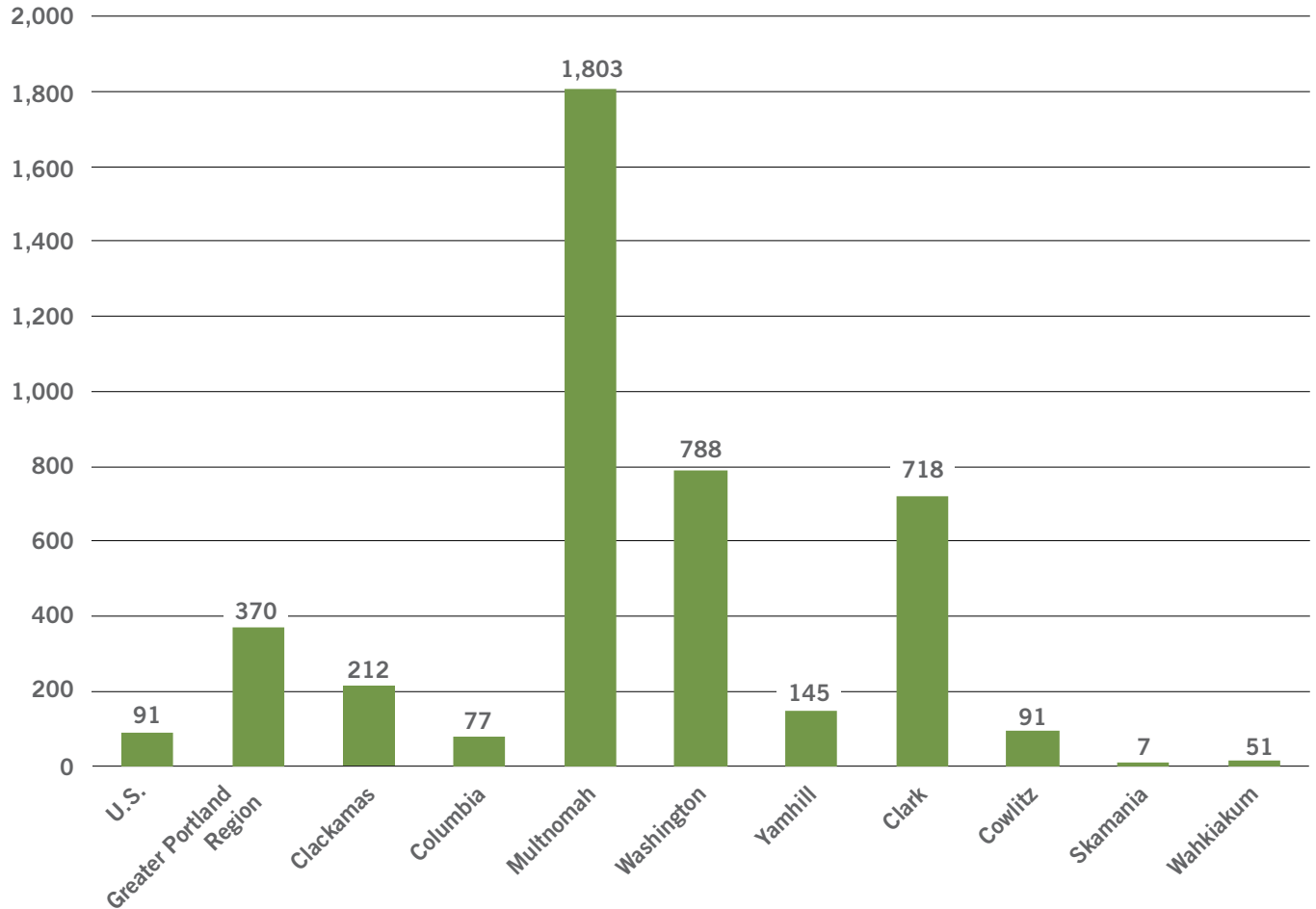
PRIME WORKING-AGE POPULATION (AGES 24-54) SHARE OF POPULATION: CURRENT AND PROJECTED GREATER PORTLAND REGION

Source: Oregon Office of Economic Analysis, Washington Office of Financial Management



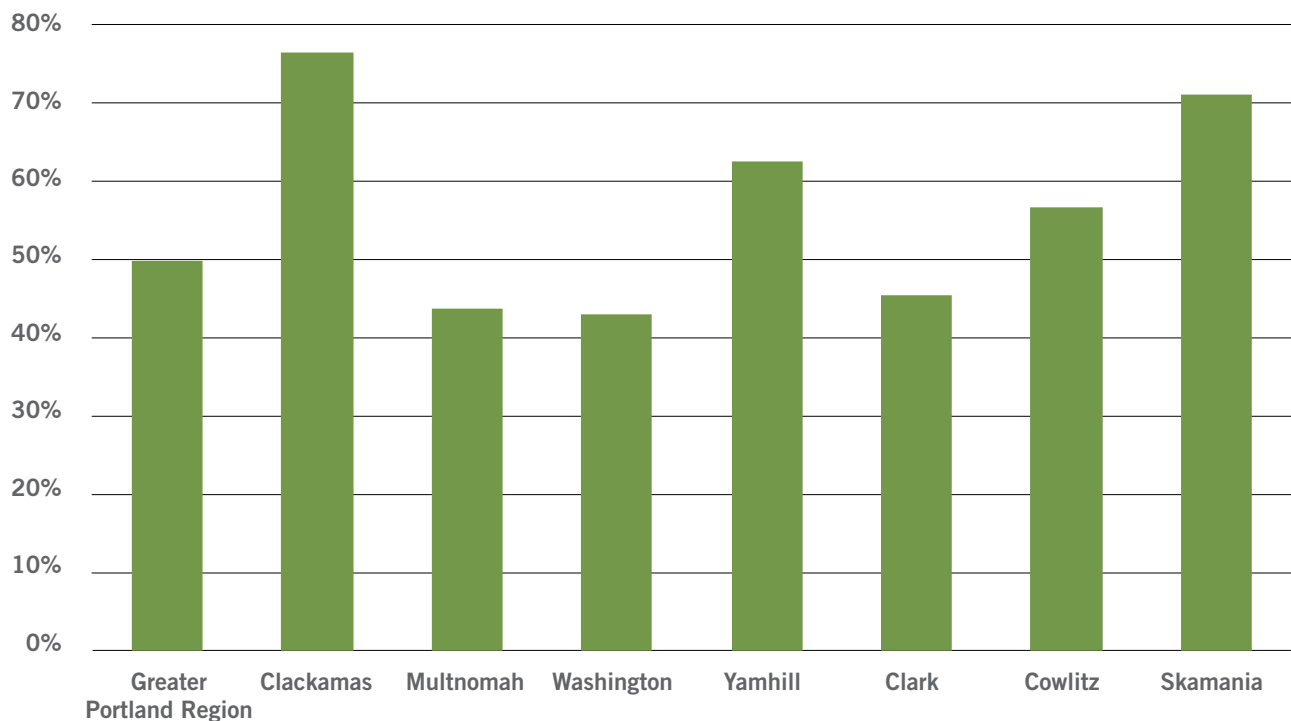
POPULATION PER SQUARE MILE: 2015

Source: U.S. Census



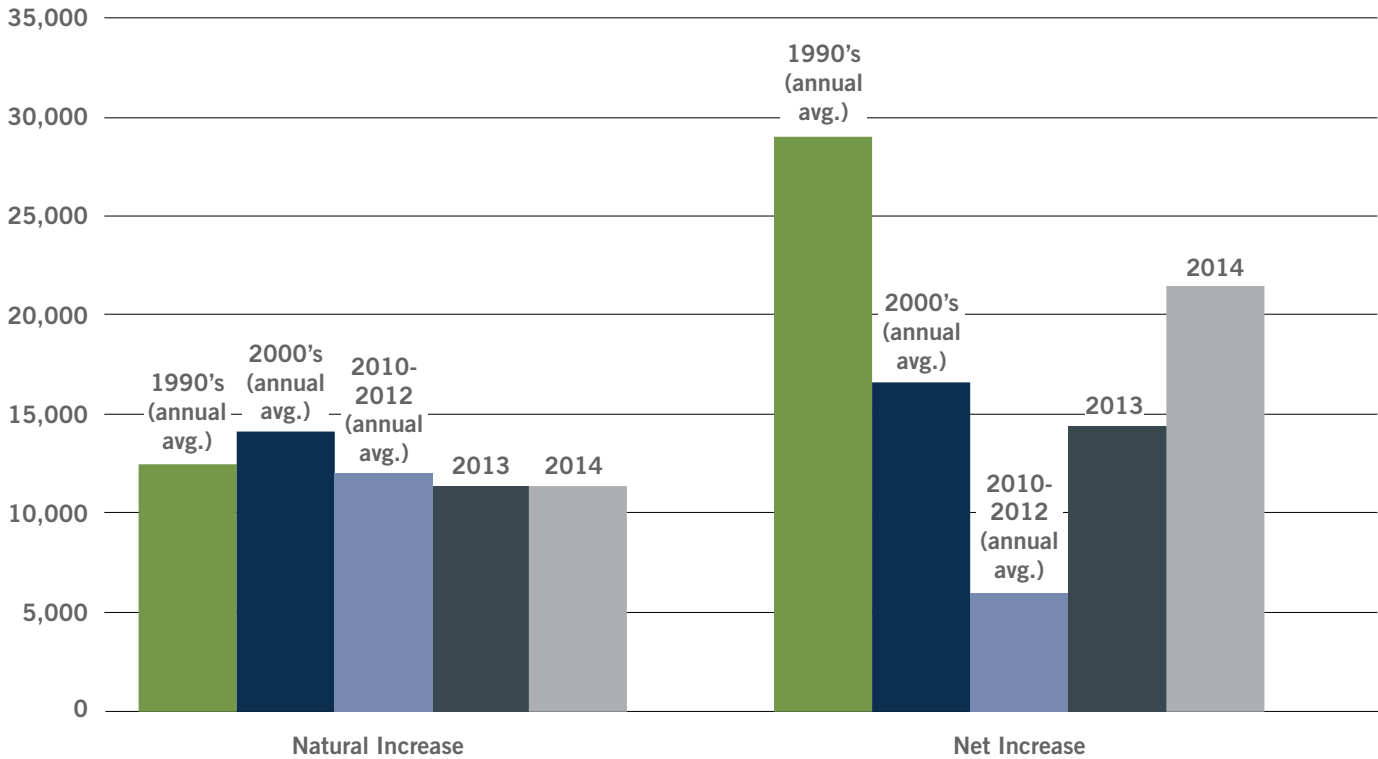
NET MIGRATION AS A PERCENT OF POPULATION GROWTH: 2010-2014

Source: Portland State University's Population Research Center, Washington Office of Financial Mgmt



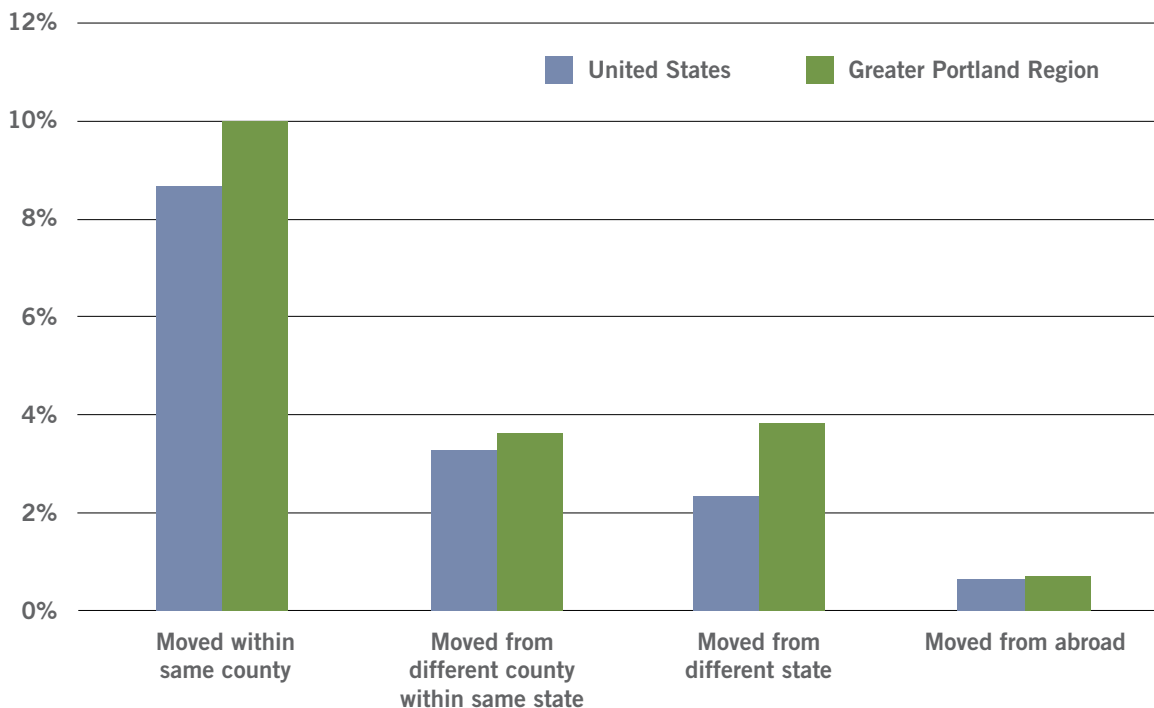
COMPONENTS OF POPULATION GROWTH: GREATER PORTLAND REGION

Source: Portland State University's Population Research Center, Washington Office of Financial Mgmt.



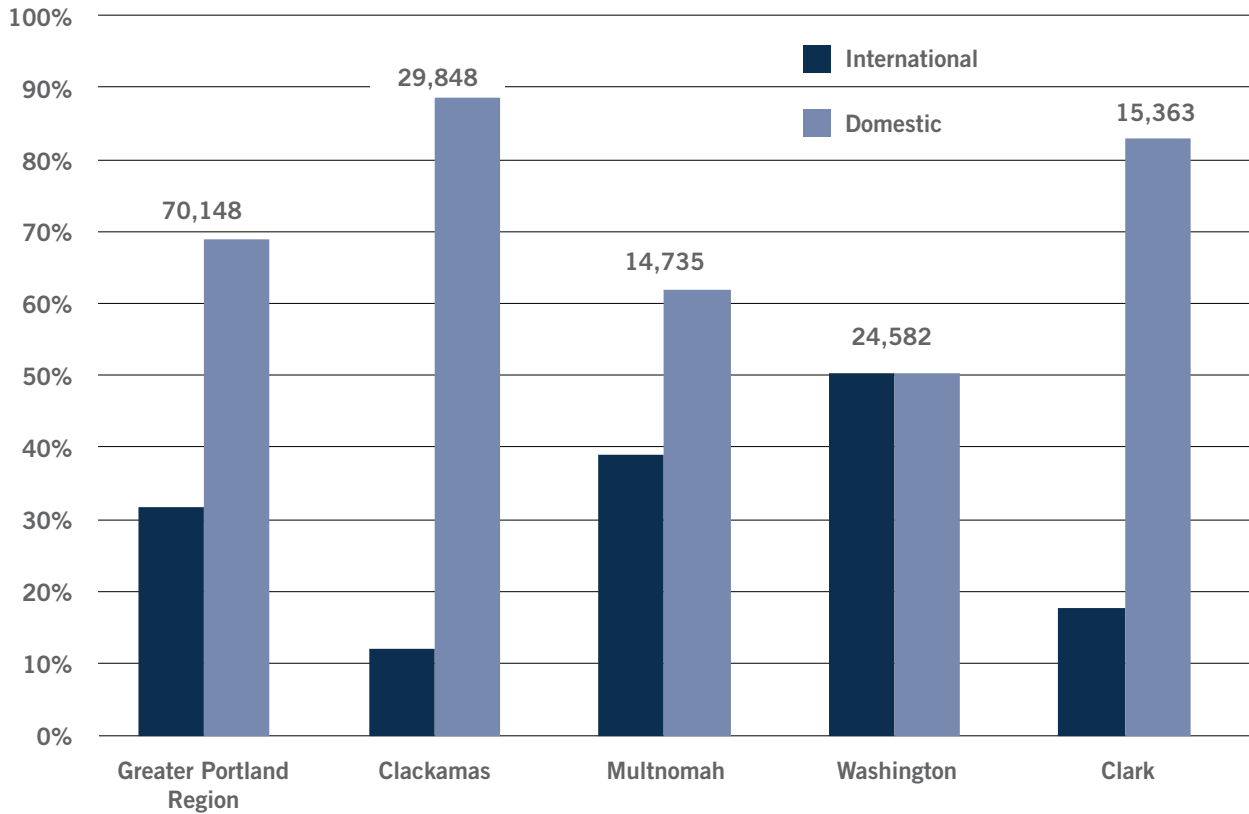
GEOGRAPHIC MOBILITY IN THE PAST YEAR SHARE OF TOTAL POPULATION: 2014

Source: U.S. Census



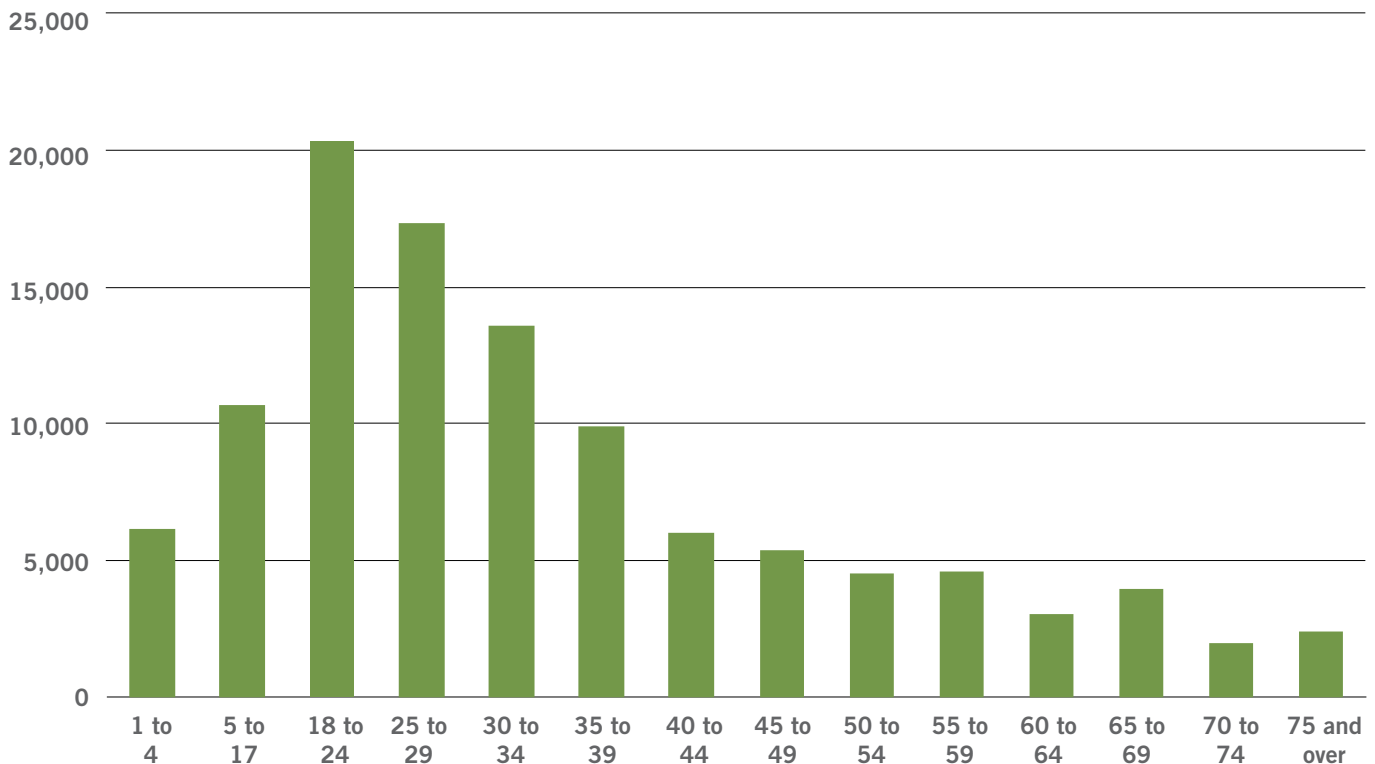
NET MIGRATION BY COMPONENT: 2010-2014

Source: U.S. Census



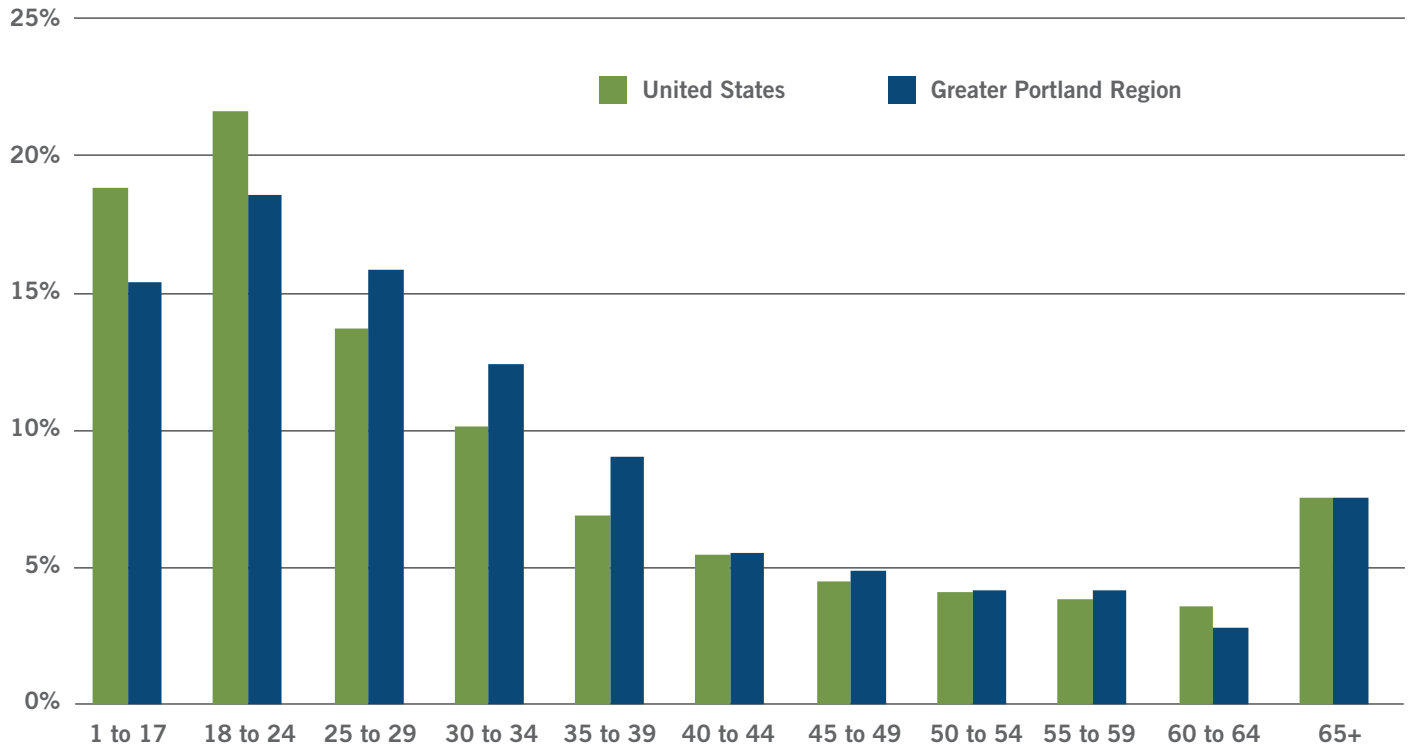
IN-MIGRATION BY AGE, GREATER PORTLAND REGION: 2014 MOVING FROM DIFFERENT STATE OR ABROAD IN PAST YEAR

Source: U.S. Census



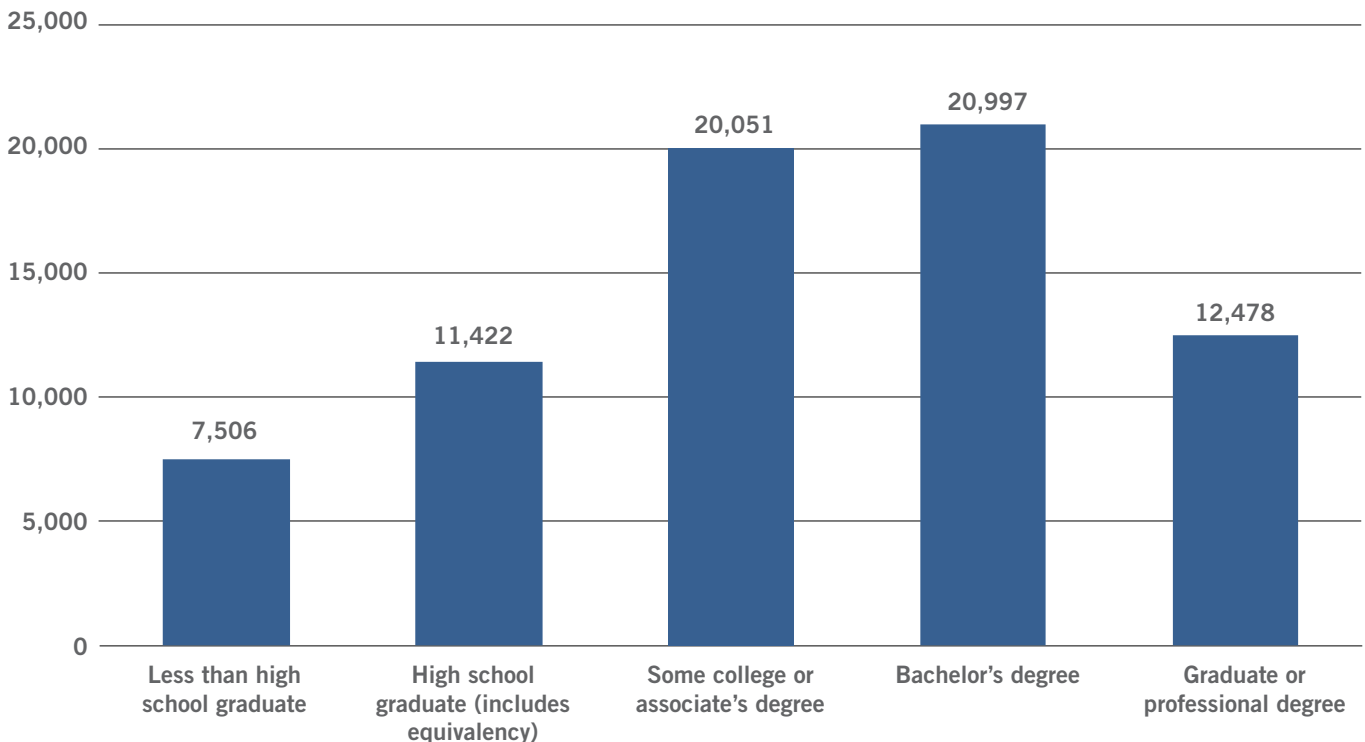
IN-MIGRATION BY AGE: 2014 MOVING FROM DIFFERENT STATE OR ABROAD IN PAST YEAR

Source: U.S. Census



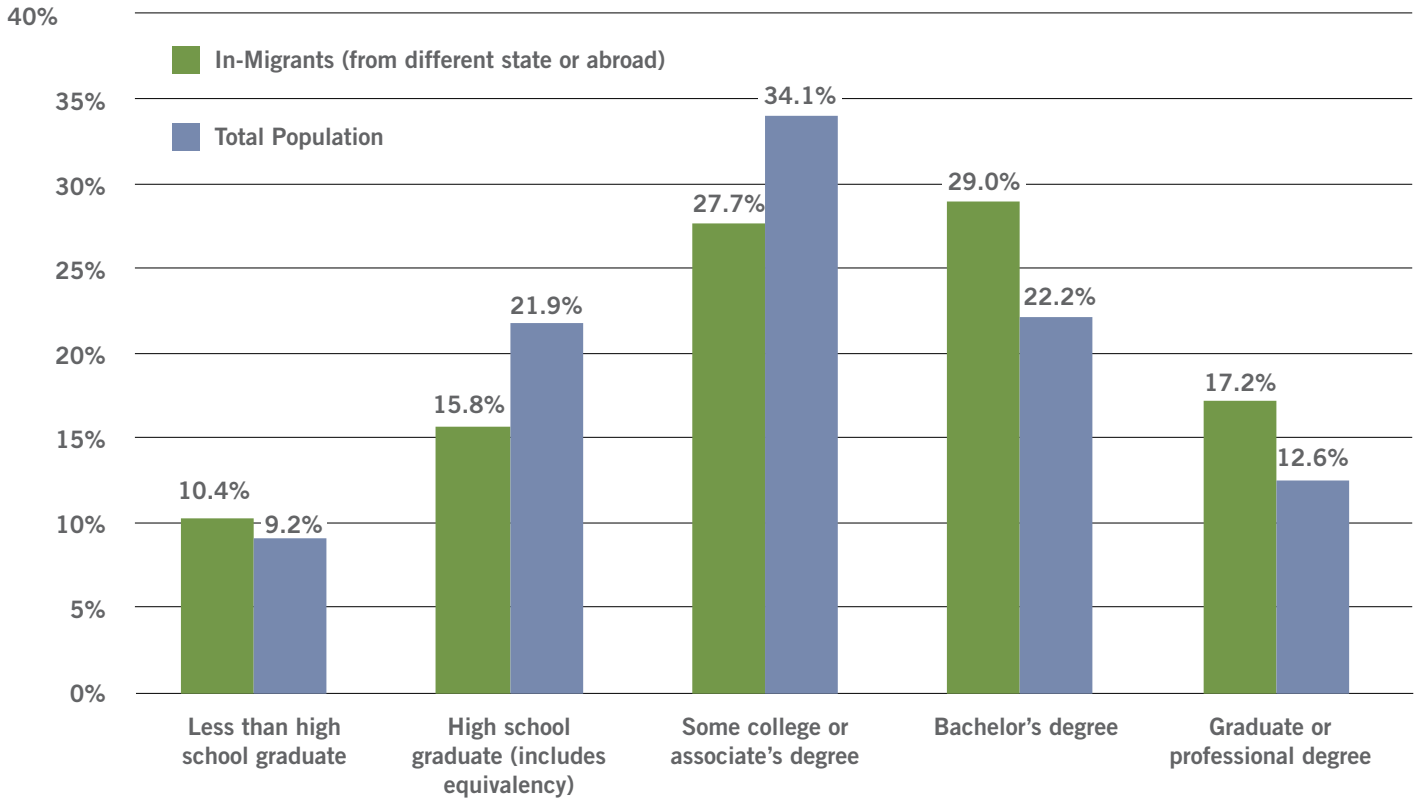
IN-MIGRATION BY EDUCATIONAL ATTAINMENT (25+ YEARS) GREATER PORTLAND REGION: 2014 MOVING FROM DIFFERENT STATE OR ABROAD IN PAST YEAR

Source: U.S. Census



IN-MIGRATION BY EDUCATIONAL ATTAINMENT GREATER PORTLAND REGION: 2014 RECENT IN-MIGRANTS COMPARED TO TOTAL POPULATION

Source: U.S. Census



RACE AND ETHNICITY

POPULATION BY RACE: 2014

Source: U.S. Census

Percent						
	Clackamas	Multnomah	Washington	Yamhill	Clark	Cowlitz
White	88.6%	77.1%	77.2%	91.8%	83.9%	90.6%
Black or African American	1.0%	5.1%	1.9%	1.4%	1.7%	0.6%
American Indian and Alaska Native	0.6%	0.9%	0.8%	0.8%	0.6%	1.3%
Asian	4.1%	6.8%	9.6%	1.5%	4.0%	1.4%
Native Hawaiian and Other Pacific Islander	0.3%	0.6%	0.3%	0.4%	0.8%	0.4%
Some other race	2.4%	3.9%	5.7%	1.2%	3.8%	1.5%
Two or more races	3.1%	5.6%	4.6%	3.0%	5.2%	4.2%

Number						
	Clackamas	Multnomah	Washington	Yamhill	Clark	Cowlitz
White	349,834	598,881	434,356	93,367	378,548	92,533
Black or African American	3,962	39,864	10,474	1,424	7,480	633
American Indian and Alaska Native	2,528	6,960	4,398	787	2,552	1,317
Asian	16,165	52,722	53,771	1,554	18,152	1,419
Native Hawaiian and Other Pacific Islander	1,030	4,807	1,960	372	3,591	390
Some other race	9,334	30,273	32,052	1,172	17,209	1,512
Two or more races	12,119	43,205	25,987	3,082	23,476	4,329
White & Black or African American	1,799	8,849	3,236	-	4,718	901
White & American Indian and Alaska Native	3,545	9,074	4,287	1,894	5,481	1,729
White & Asian	4,595	11,869	9,359	921	6,109	853
Total Population	394,972	776,712	562,998	101,758	451,008	102,133

HISPANIC POPULATION

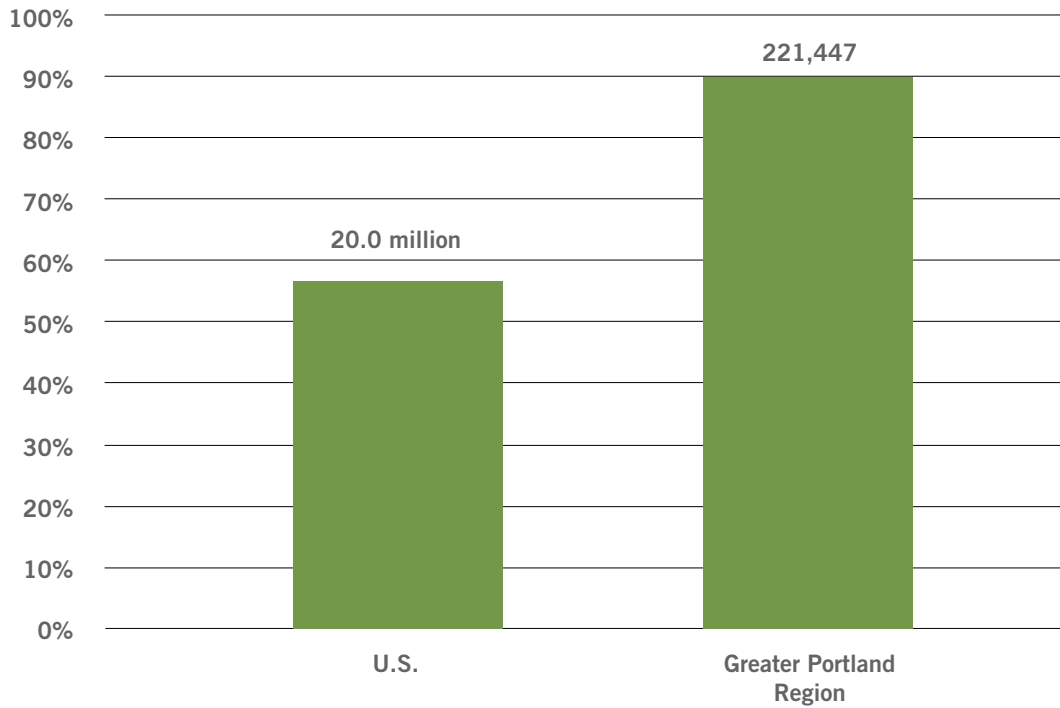
Source: U.S. Census

	U.S.	Greater Portland Region	Clackamas	Multnomah	Washington	Yamhill	Clark	Cowlitz
2000	35,305,818	145,980	16,744	49,607	49,735	9,017	16,248	4,231
2014	55,279,452	279,051	32,994	87,019	91,671	15,980	39,110	8,598
Growth (#)	19,973,634	133,071	16,250	37,412	41,936	6,963	22,862	4,367
Growth (%)	57%	91%	97%	75%	84%	77%	141%	103%

Excludes Wahkiakum

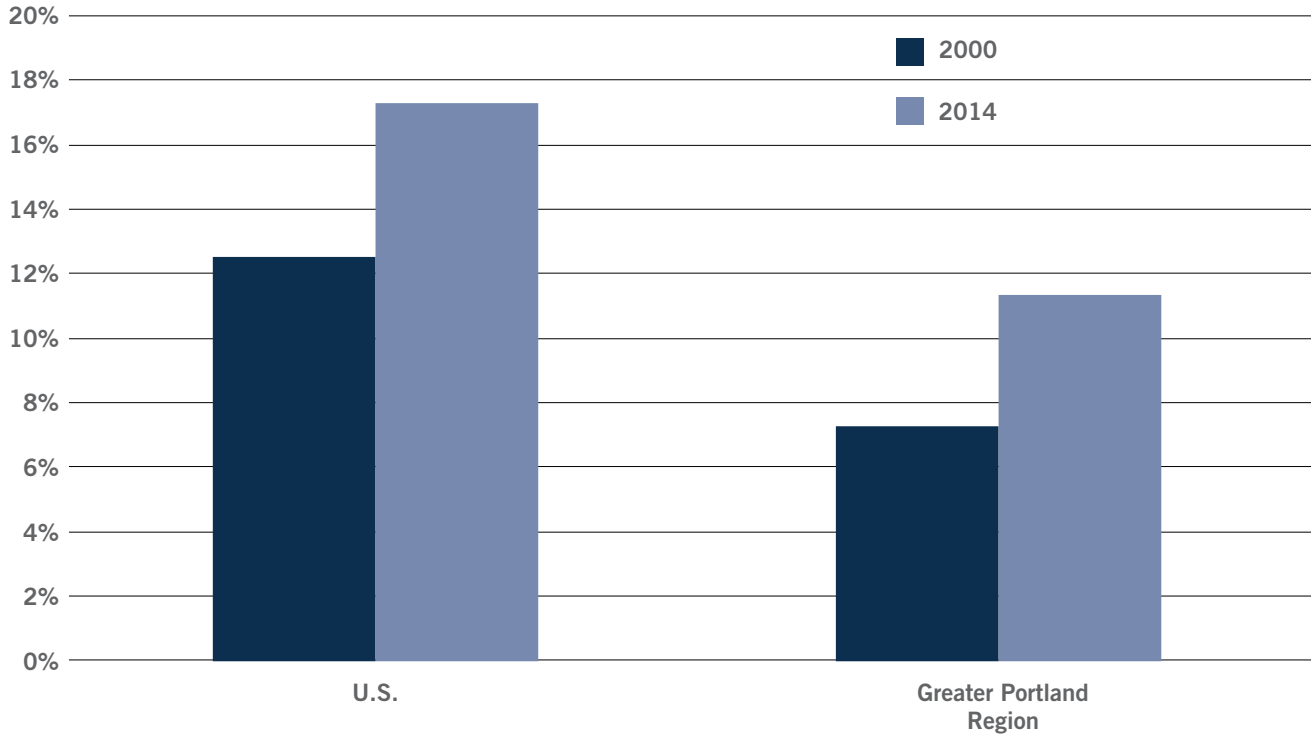
GROWTH IN HISPANIC/LATINO POPULATION: 2000–2014

Source: U.S. Census



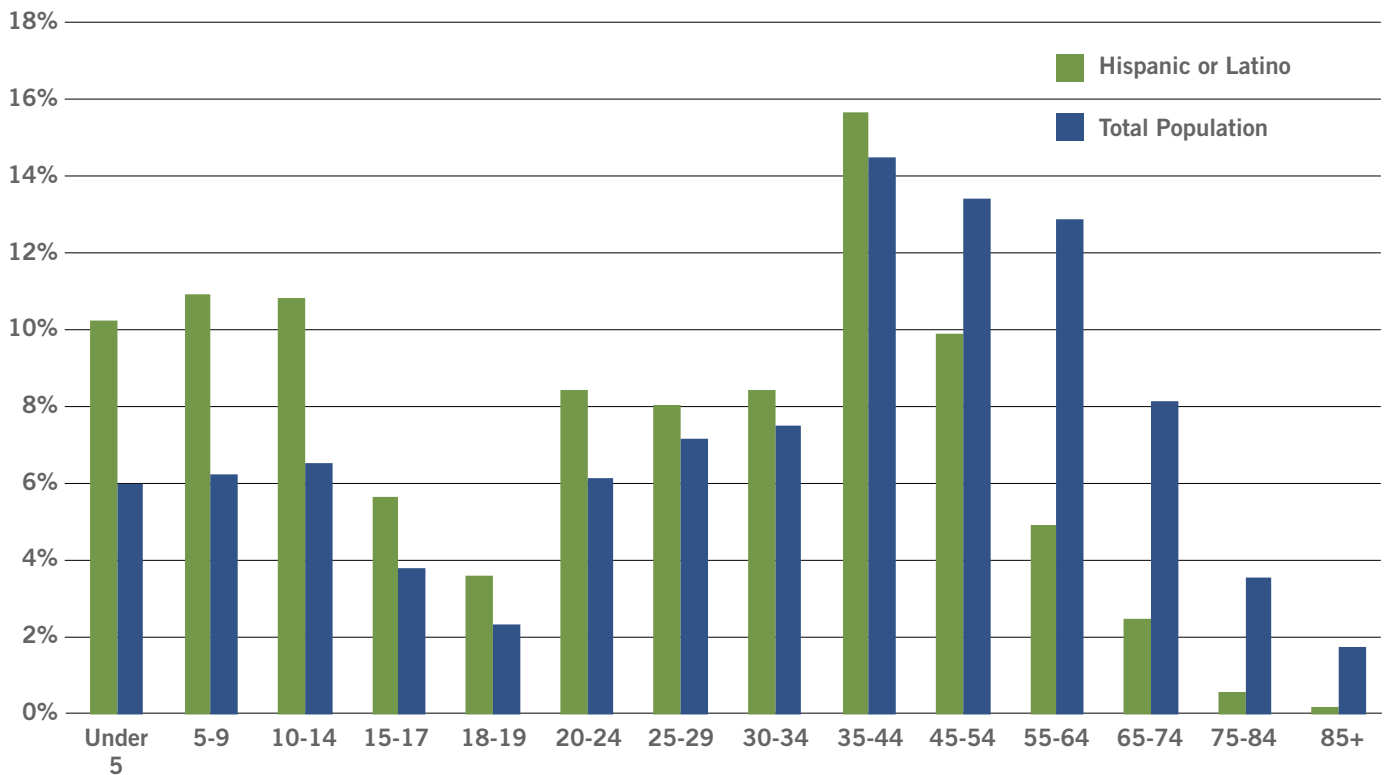
HISPANIC/LATINO POPULATION AS A PERCENT OF TOTAL: 2000 AND 2014

Source: U.S. Census



SHARE OF POPULATION BY AGE AND ETHNICITY GREATER PORTLAND REGION: 2014

Source: U.S. Census



RACIAL COMPOSITION OVER TIME

Source: U.S. Census

Population by Race: 2014								
	U.S.	Greater Portland Region	Clackamas	Multnomah	Washington	Yamhill	Clark	Cowlitz
Total Population	318,857,056	2,449,260	394,972	776,712	562,998	101,758	451,008	102,133
White	242,169,652	2,104,744	361,407	636,726	457,425	96,319	399,551	96,771
Black or African American	44,171,261	93,834	6,269	53,201	15,551	1,424	14,895	2,134
Asian	5,396,560	58,123	6,536	20,777	11,978	2,740	10,354	3,836
American Indian and Alaska Native	19,658,736	192,029	21,796	70,046	66,730	2,664	27,276	2,468
Native Hawaiian and Other Pacific Islander	1,270,272	23,949	1,841	8,268	6,219	502	6,337	420
Some other race	16,703,187	103,917	10,172	36,330	34,528	1,250	19,359	1,595

Population by Race: 2000								
	U.S.	Greater Portland Region	Clackamas	Multnomah	Washington	Yamhill	Clark	Cowlitz
Total Population	281,421,906	2,020,829	338,391	660,486	445,342	84,992	345,238	87,619
White	216,930,975	1,773,001	316,473	545,309	378,299	77,553	316,250	756
Black or African American	36,419,434	65,289	3,497	44,755	7,307	946	7,787	2,796
Asian	11,898,828	38,929	10,921	45,012	35,197	1,391	14,296	1,637
American Indian and Alaska Native	4,119,301	109,007	5,256	14,701	6,183	2,105	6,320	272
Native Hawaiian and Other Pacific Islander	874,414	11,692	1,348	4,419	2,876	264	2,381	2,425
Some other race	18,521,486	94,149	9,969	35,508	30,800	4,924	9,663	

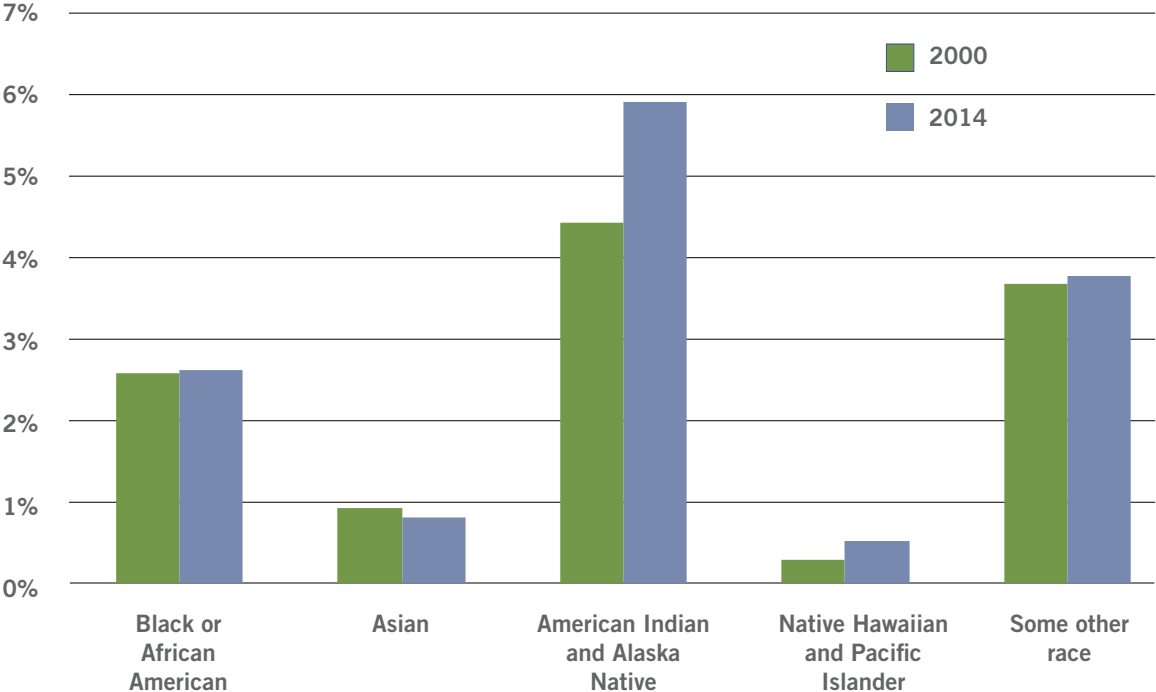
NOTE: Sum of races exceed total population due to people selecting two (or more) races

Greater Portland excludes Wahkiakum

2014 data unavailable for Columbia, Skamania, Wahkiakum counties

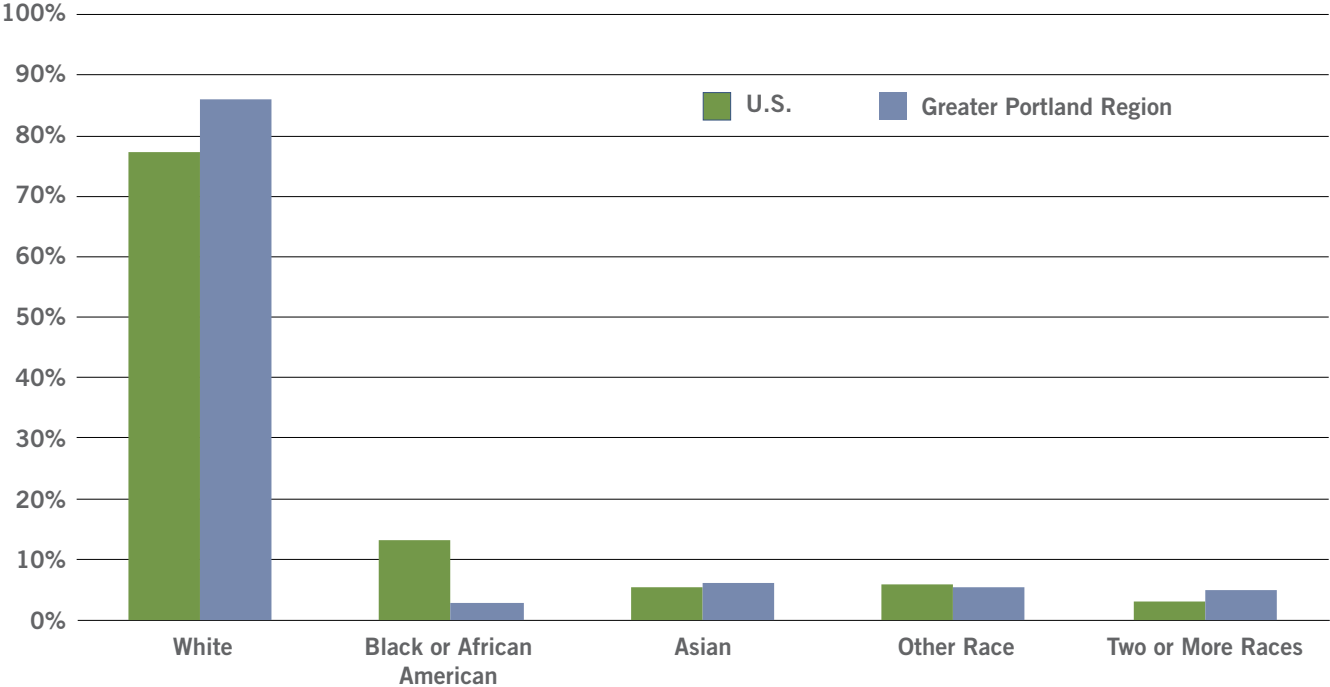
SHARE OF POPULATION BY RACE GREATER PORTLAND REGION: 2000 AND 2014

Source: U.S. Census



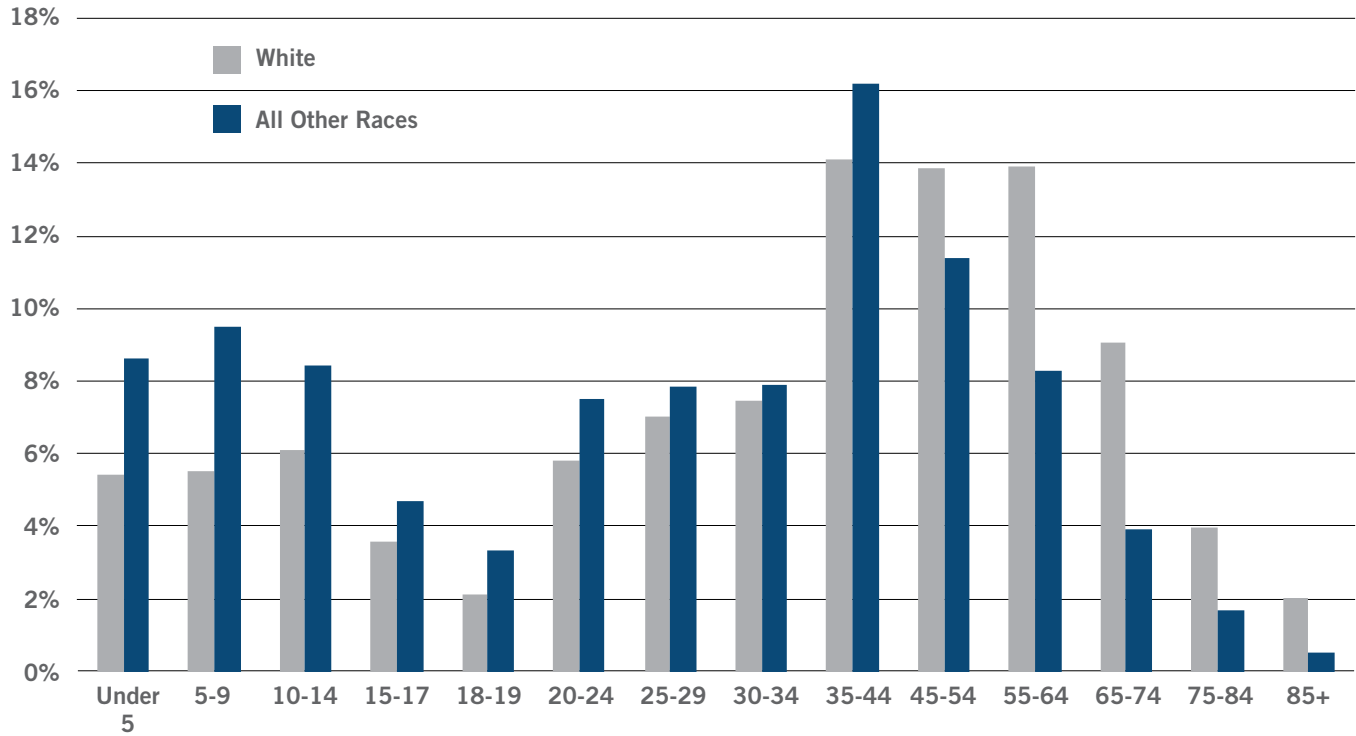
DISTRIBUTION OF POPULATION BY RACE: 2014

Source: U.S. Census



SHARE OF POPULATION BY AGE AND RACE GREATER PORTLAND REGION: 2014

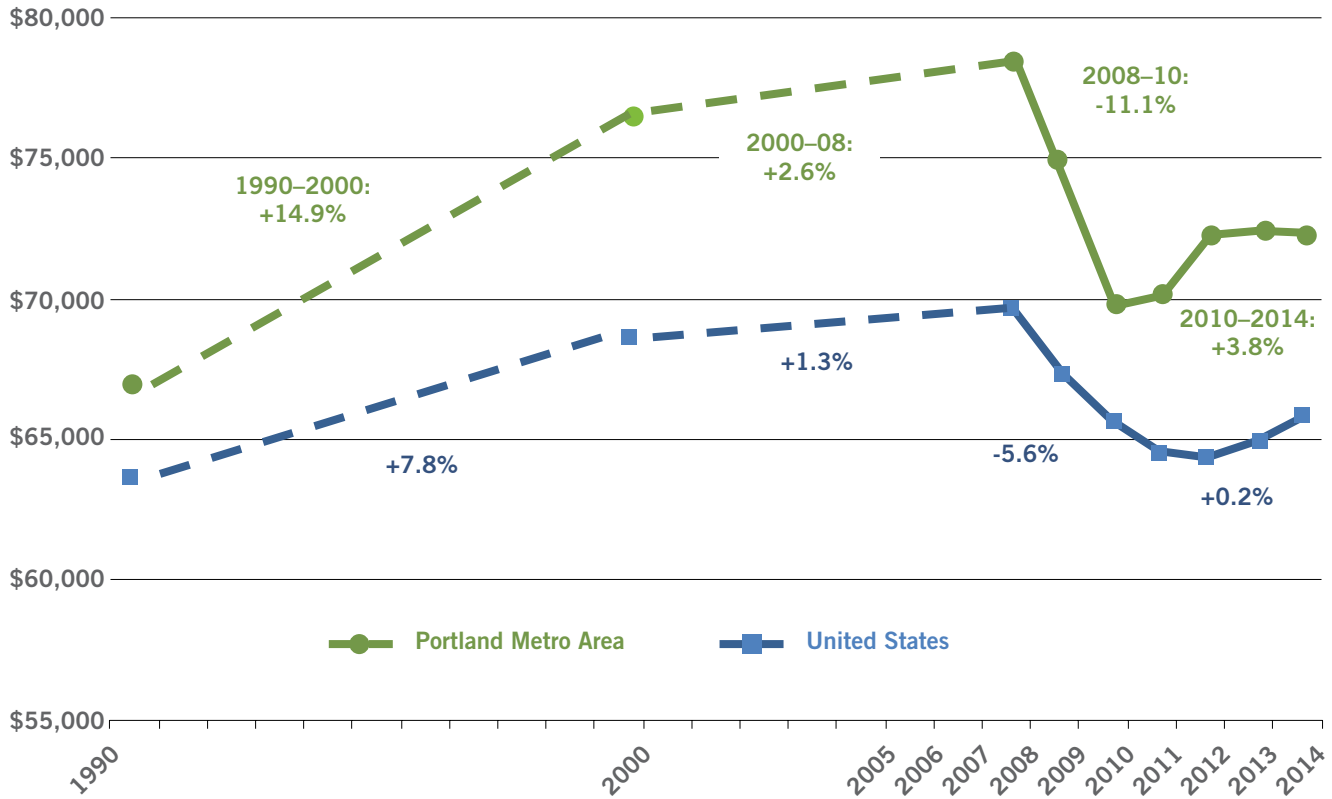
Source: U.S. Census



INCOME

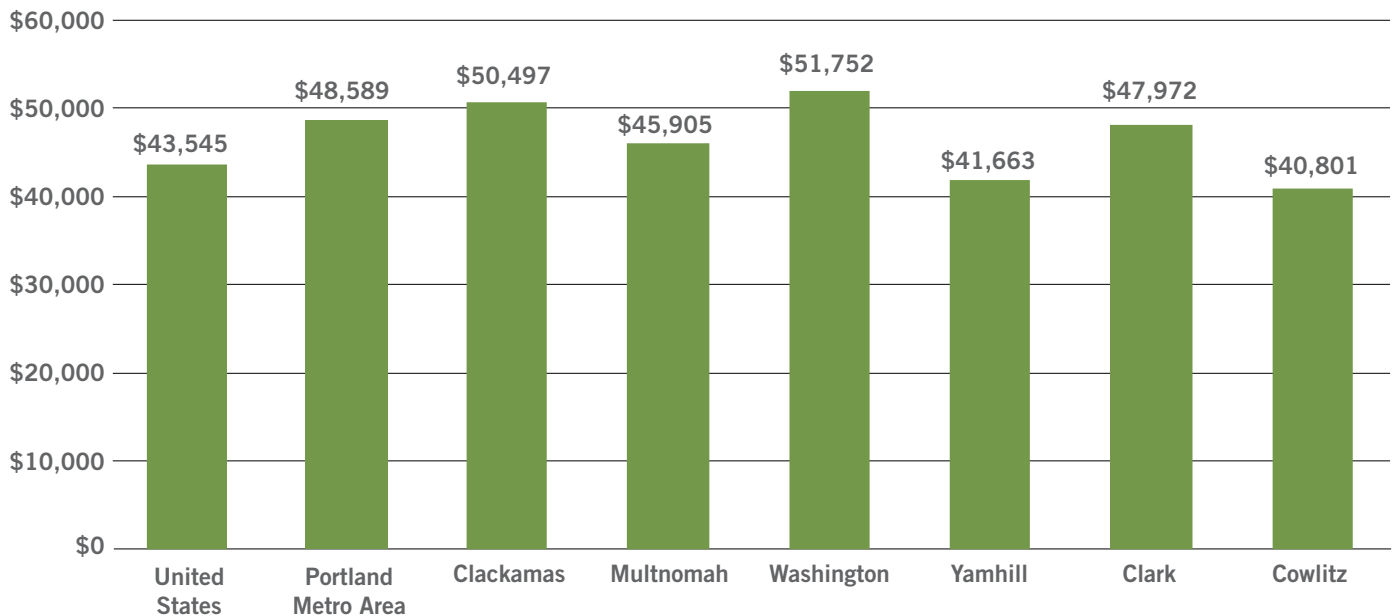
MEDIAN FAMILY INCOME: 1990-2014 (IN 2014 DOLLARS)

Source: U.S. Census



MEDIAN EARNINGS OF FULL-TIME, YEAR-ROUND WORKERS: 2014

Source: U.S. Census



MEDIAN INCOME (2014 DOLLARS)

Source: U.S. Census

Median Household Income Growth

	Clackamas	Columbia*	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania*	Wahkiakum*	Portland Metro Area	U.S.
1990-2000	14.5%	17.8%	16.3%	11.3%	18.3%	15.5%	8.4%	3.7%	11.0%	15.0%	6.0%
2000-2010	-13.1%	-4.8%	-8.1%	-8.4%	-10.0%	-10.3%	-18.5%	-2.2%	-19.2%	-11.0%	-5.9%
2010-2014	5.0%	-8.9%	2.9%	0.7%	-4.3%	3.5%	-5.3%	-3.6%	1.5%	4.6%	-1.2%

Median Family Income Growth

	Clackamas	Columbia*	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania*	Wahkiakum*	Portland Metro Area	U.S.
1990-2000	15.1%	13.4%	15.8%	12.7%	18.6%	13.2%	-2.5%	9.4%	21.7%	14.9%	7.8%
2000-2010	-7.5%	-3.6%	-9.2%	-7.9%	-11.8%	-8.4%	-14.7%	9.0%	-21.6%	-8.8%	-4.4%
2010-2014	3.7%	-6.4%	7.7%	-1.0%	3.3%	5.2%	-7.6%	-1.1%	-3.5%	3.8%	0.2%

Median Household Income (2014 dollars)

	Clackamas	Columbia*	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania*	Wahkiakum*	Portland Metro Area	U.S.
1990	\$62,524	\$53,446	\$48,774	\$64,399	\$51,265	\$57,599	\$50,473	\$52,125	\$48,849	\$56,279	\$54,440
2000	\$71,598	\$62,961	\$56,748	\$71,656	\$60,643	\$66,506	\$54,712	\$54,052	\$54,227	\$64,720	\$57,732
2010	\$62,206	\$59,928	\$52,159	\$65,671	\$54,606	\$59,629	\$44,571	\$52,876	\$43,831	\$57,625	\$54,333
2014	\$65,316	\$54,605	\$53,660	\$66,136	\$52,255	\$61,741	\$42,223	\$50,986	\$44,500	\$60,248	\$53,657

Median Family Income (2014 dollars)

	Clackamas	Columbia*	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania*	Wahkiakum*	Portland Metro Area	U.S.
1990	\$72,593	\$62,318	\$60,682	\$75,040	\$58,324	\$65,585	\$65,585	\$56,034	\$53,757	\$66,598	\$63,803
2000	\$83,574	\$70,637	\$70,276	\$84,547	\$69,201	\$74,260	\$63,971	\$61,296	\$65,445	\$76,532	\$68,802
2010	\$77,327	\$68,102	\$63,805	\$77,852	\$61,069	\$68,039	\$54,586	\$66,812	\$51,315	\$69,797	\$65,801
2014	\$80,175	\$63,776	\$68,732	\$77,054	\$63,098	\$71,583	\$50,464	\$66,104	\$49,523	\$72,419	\$65,910

*2014 data are 5-year estimates

PER CAPITA PERSONAL INCOME (2014 DOLLARS)

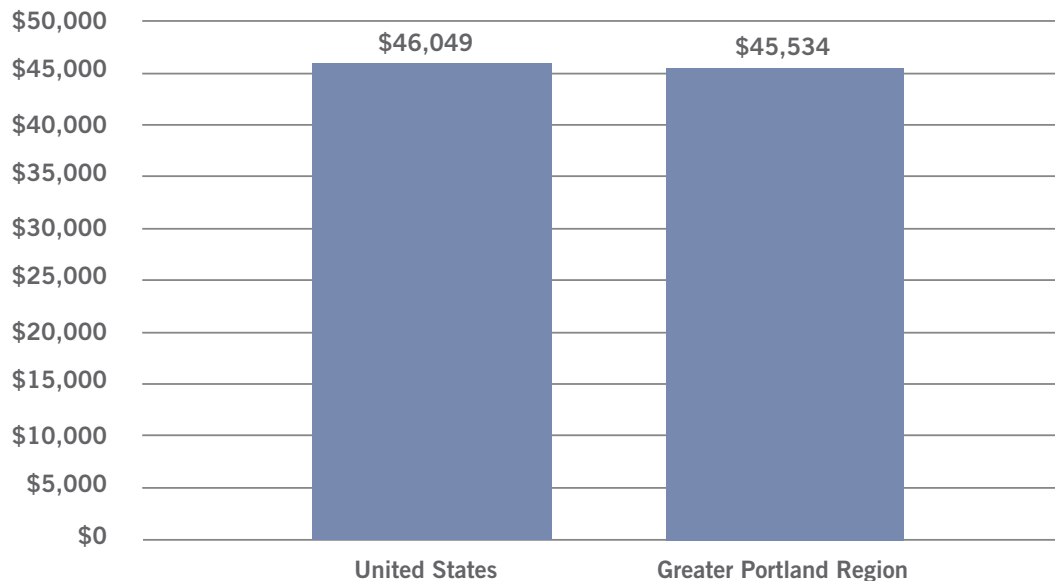
Source: Bureau of Economic Analysis

	U.S.	Greater Portland Region
2000	\$42,071	\$44,725
2014	\$46,049	\$45,534
	2000-2014 Change	
Number	\$3,978	\$809
Percent	9.5%	1.8%

	Clackamas	Columbia	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania	Wahkiakum
2000	\$51,103	\$36,745	\$45,638	\$46,661	\$34,225	\$41,037	\$32,871	\$31,649	\$31,546
2014	\$48,713	\$36,680	\$47,106	\$46,713	\$36,488	\$43,153	\$38,135	\$36,999	\$35,534
	2000-2014 Change								
Number	-\$2,390	-\$65	\$1,468	\$52	\$2,263	\$2,116	\$5,264	\$5,350	\$3,988
Percent	-4.7%	-0.2%	3.2%	0.1%	6.6%	5.2%	16.0%	16.9%	12.6%

PER CAPITA PERSONAL INCOME: 2014

Source: U.S. Bureau of Economic Analysis



PERSONAL INCOME BY SOURCE: 2014

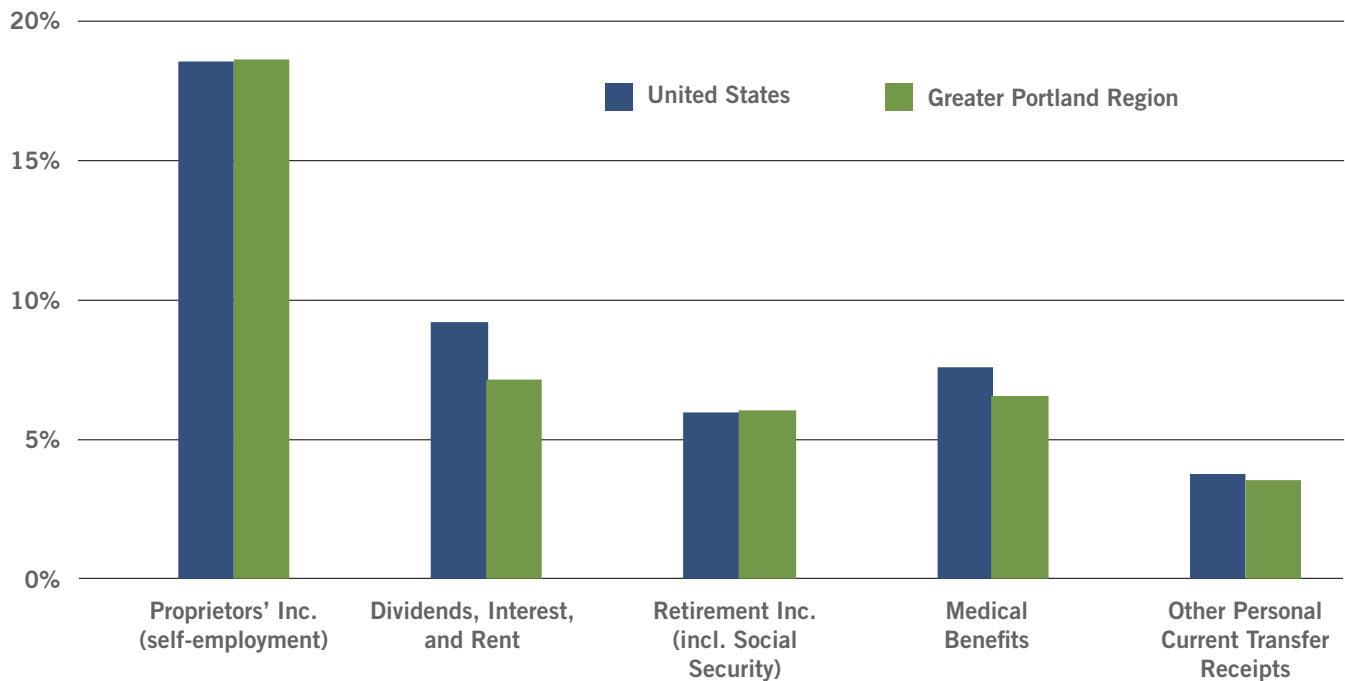
Source: Bureau of Economic Analysis

	Clackamas	Columbia	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania	Wahkiakum
Wages and Salaries	58.9%	57.2%	55.7%	64.3%	52.5%	57.4%	49.4%	53.1%	36.1%
Proprietors' Income (self-employment)	18.9%	14.0%	18.8%	18.6%	18.6%	18.9%	15.8%	21.4%	25.3%
Dividends, Interest, and Rent	8.3%	3.3%	10.0%	3.7%	6.2%	6.0%	6.8%	2.5%	5.0%
Retirement Income (incl. Social Security)	6.6%	10.1%	4.9%	4.9%	8.1%	7.0%	10.4%	9.3%	15.7%
Medical Benefits	4.6%	10.8%	6.7%	5.7%	10.2%	6.9%	11.9%	9.6%	13.1%
Other Personal Current Transfer Receipts*	2.8%	4.6%	3.9%	2.7%	4.4%	3.9%	5.8%	4.1%	4.8%

*e.g. unemployment insurance benefits, veterans benefits

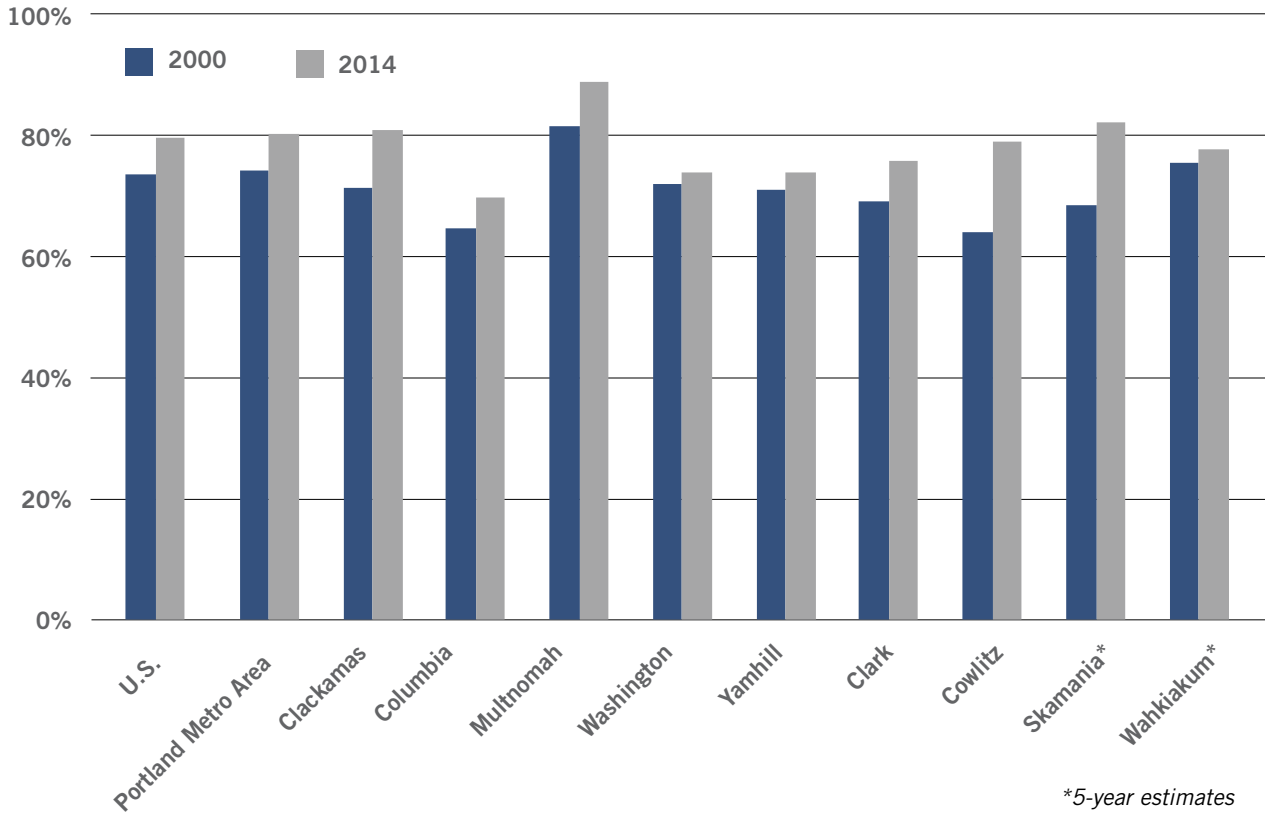
PERSONAL INCOME BY SOURCE: 2014 (WAGE AND SALARY INCOME NOT INCLUDED)

Source: Bureau of Economic Analysis



MEDIAN EARNINGS, FEMALE AS A PERCENTAGE OF MALE: 2000 AND 2014

Source: U.S. Census



LABOR FORCE

CIVILIAN LABOR FORCE: 2015

Oregon Employment Department, U.S. Bureau of Labor Statistics

	Labor Force	Employment	Unemployment	Unemployment Rate
United States	157,119,455	148,754,545	8,364,909	5.3%
Greater Portland Region	1,257,672	1,189,335	68,337	5.4%
Clackamas	202,227	191,593	10,634	5.3%
Columbia	22,812	21,174	1,638	7.2%
Multnomah	424,387	402,951	21,435	5.1%
Washington	296,951	282,654	14,297	4.8%
Yamhill	50,766	48,045	2,720	5.4%
Clark	209,847	196,117	13,730	6.5%
Cowlitz	44,274	40,874	3,400	7.7%
Skamania	4,998	4,629	369	7.4%
Wahkiakum	1,411	1,297	114	8.1%

Year-to-date through November

CIVILIAN LABOR FORCE GROWTH

Oregon Employment Department, U.S. Bureau of Labor Statistics

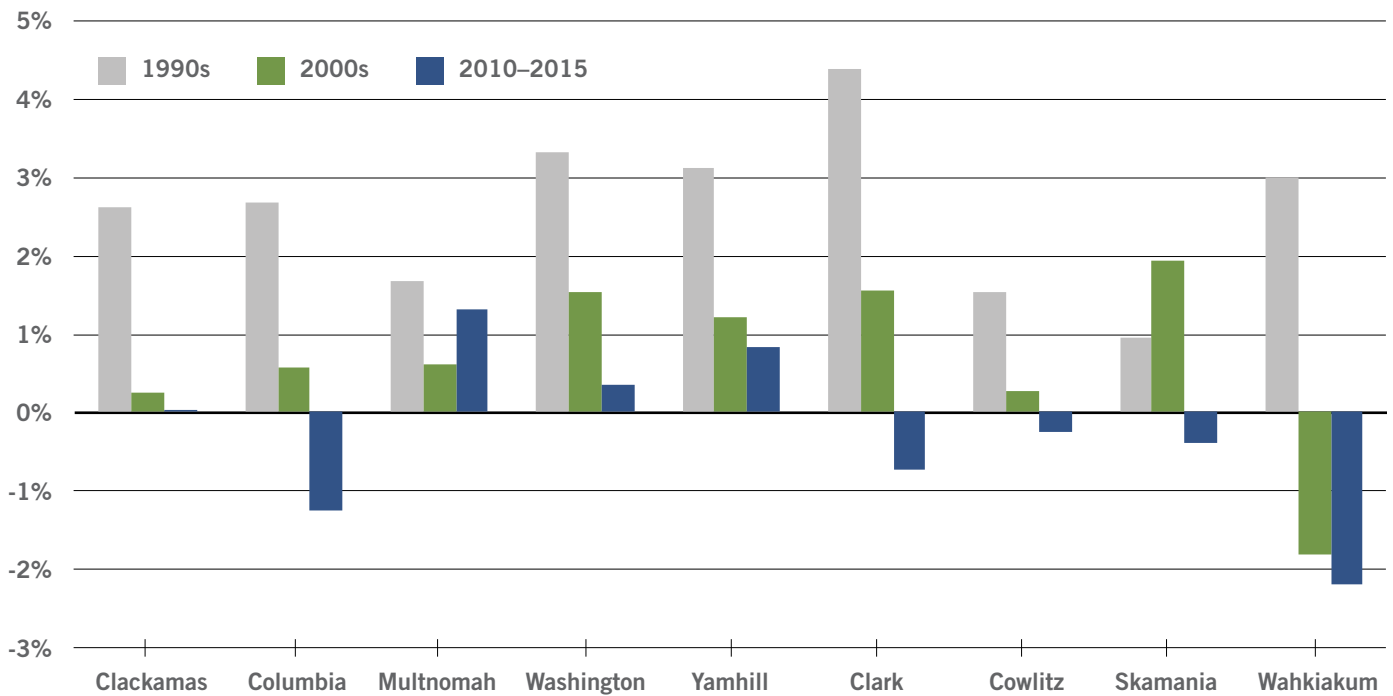
	1995	2005	2015*	10-year Growth 2005–2015	
				#	%
United States	132,304,000	149,320,000	157,119,455	7,799,455	5.2%
Greater Portland Region	1,015,378	1,138,401	1,257,672	119,271	10.5%
Clackamas	180,830	190,177	202,227	12,050	6.3%
Columbia	20,900	23,209	22,812	-397	-1.7%
Multnomah	353,176	360,354	424,387	64,033	17.8%
Washington	222,028	268,325	296,951	28,626	10.7%
Yamhill	38,189	44,039	50,766	6,727	15.3%
Clark	153,519	202,656	209,847	7,191	3.5%
Cowlitz	40,895	42,978	44,274	1,296	3.0%
Skamania	4,151	5,033	4,998	-35	-0.7%
Wahkiakum	1,690	1,630	1,411	-219	-13.4%

Year-to-date through November

*YTD through November

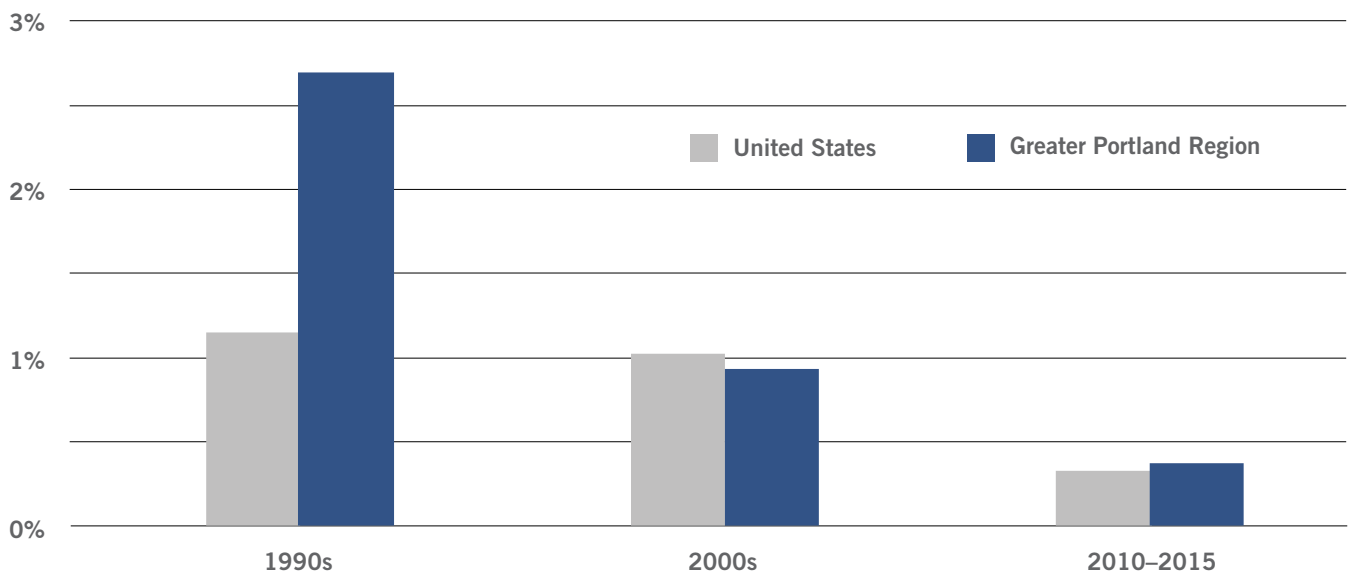
CIVILIAN LABOR FORCE: AVERAGE ANNUAL GROWTH RATES

Oregon Employment Department, U.S. Bureau of Labor Statistics



CIVILIAN LABOR FORCE: AVERAGE ANNUAL GROWTH RATES

Source: Source: U.S. Bureau of Labor Statistics



LABOR FORCE PARTICIPATION RATE

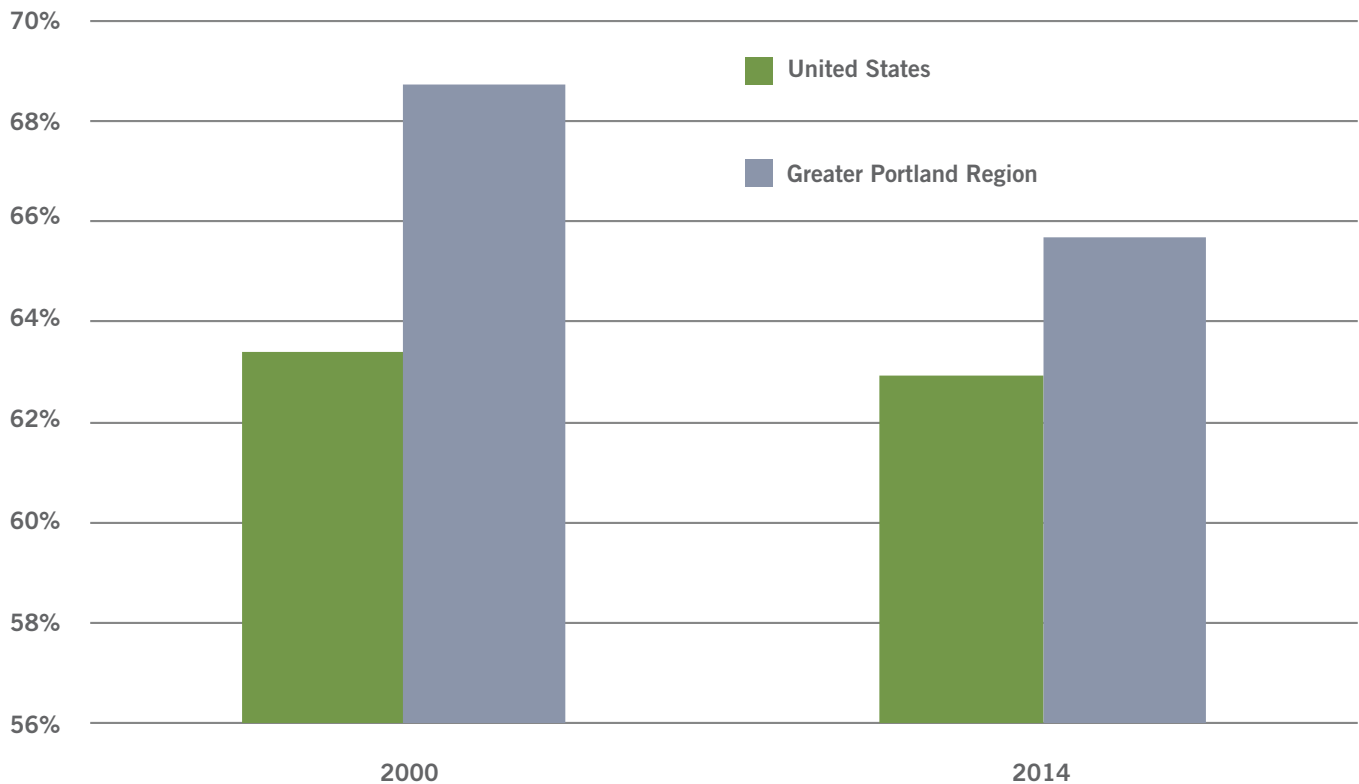
Source: U.S. Census

	2000	2014
Clackamas County	68.6%	64.3%
Columbia County	64.7%	58.4%
Multnomah County	69.0%	68.6%
Washington County	72.2%	68.0%
Yamhill County	64.5%	58.6%
Clark County	67.8%	64.4%
Cowlitz	60.9%	53.8%
Skamania County	64.2%	56.8%
Wahkiakum	55.2%	42.7%
Greater Portland Region	68.7%	65.7%
U.S.	63.4%	62.9%

Greater Portland Region excludes Wahkiakum

LABOR FORCE PARTICIPATION RATE: 2000 AND 2014

Source: U.S. Census



LABOR FORCE PARTICIPATION RATE BY AGE GROUP: 2000 AND 2014

Source: U.S. Census

	Labor Force Participation Rate: 2014		
	16-21	22-54	55+
United States	47.6%	80.4%	39.0%
Greater Portland Region	50.9%	82.6%	40.0%
Clackamas County	46.0%	83.4%	42.8%
Columbia County*	46.9%	77.8%	35.1%
Multnomah County	51.6%	84.2%	40.0%
Washington County	52.7%	82.3%	43.7%
Yamhill County	56.0%	77.4%	32.8%
Clark County	52.2%	82.1%	39.2%
Cowlitz County	41.0%	75.9%	29.3%
Skamania County*	45.2%	76.6%	34.7%
Wahkiakum County*	47.3%	67.5%	23.1%

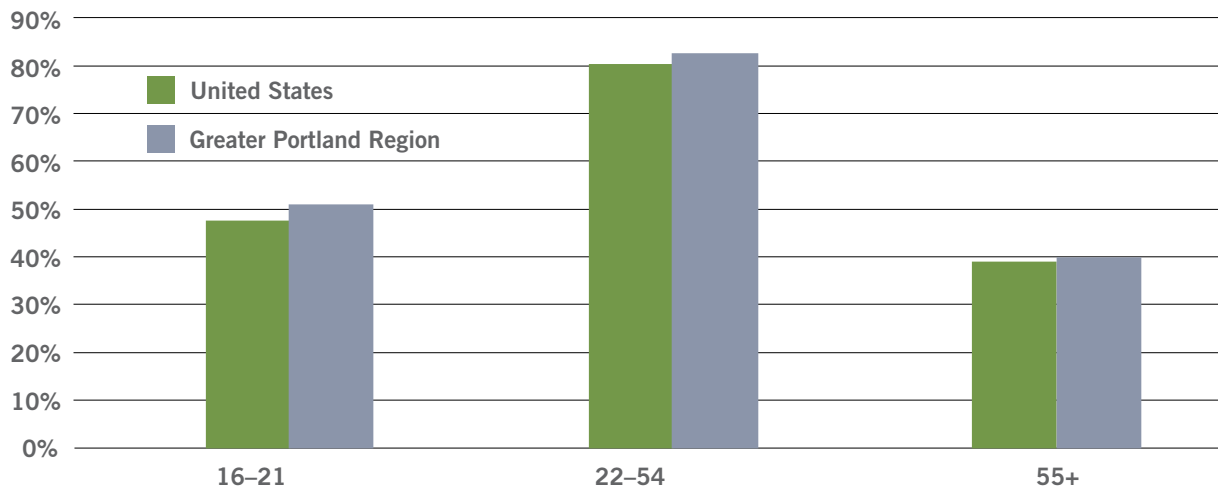
	Labor Force Participation Rate: 2000		
	16-21	22-54	55+
United States	56.4%	78.7%	31.5%
Greater Portland Region	61.4%	82.6%	33.8%
Clackamas County	60.8%	83.5%	36.1%
Columbia County*	57.7%	81.7%	29.9%
Multnomah County	61.6%	82.9%	32.1%
Washington County	62.6%	84.1%	37.7%
Yamhill County	61.9%	79.7%	30.5%
Clark County	61.6%	81.0%	34.0%
Cowlitz County	57.8%	78.5%	27.1%
Skamania County*	51.2%	80.9%	32.1%
Wahkiakum County*	55.2%	77.6%	27.5%

* 2014 data are 5-year-estimates

Greater Portland Region excludes Wahkiakum

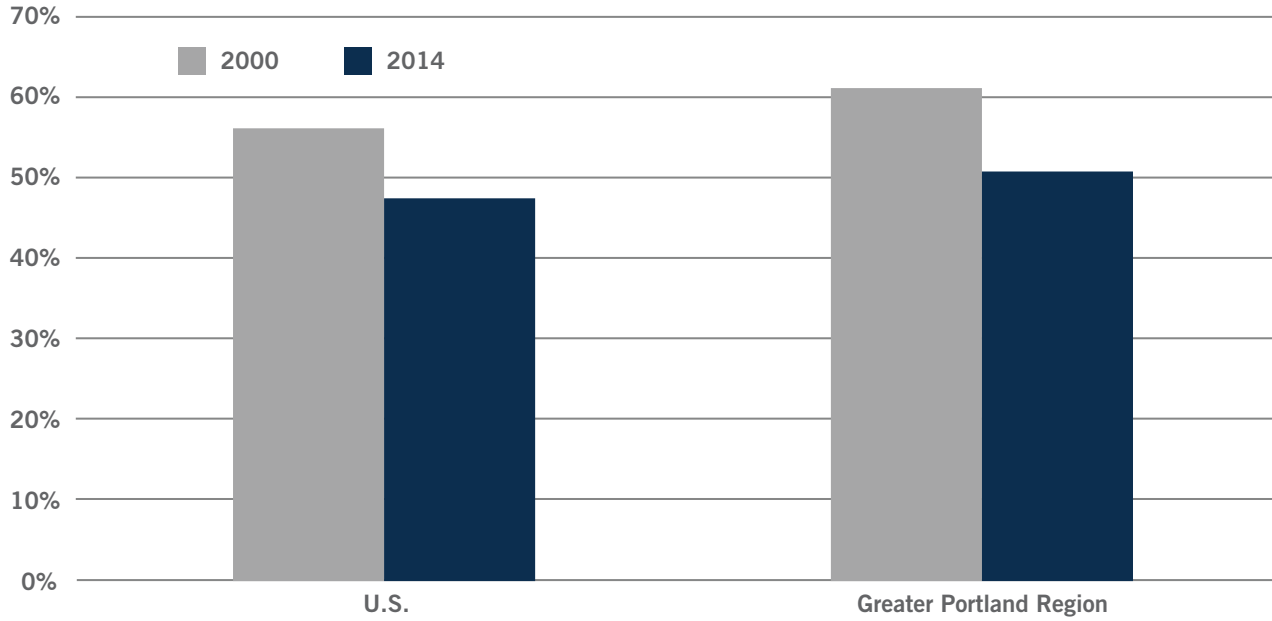
LABOR FORCE PARTICIPATION RATE BY AGE GROUP: 2014

Source: U.S. Census



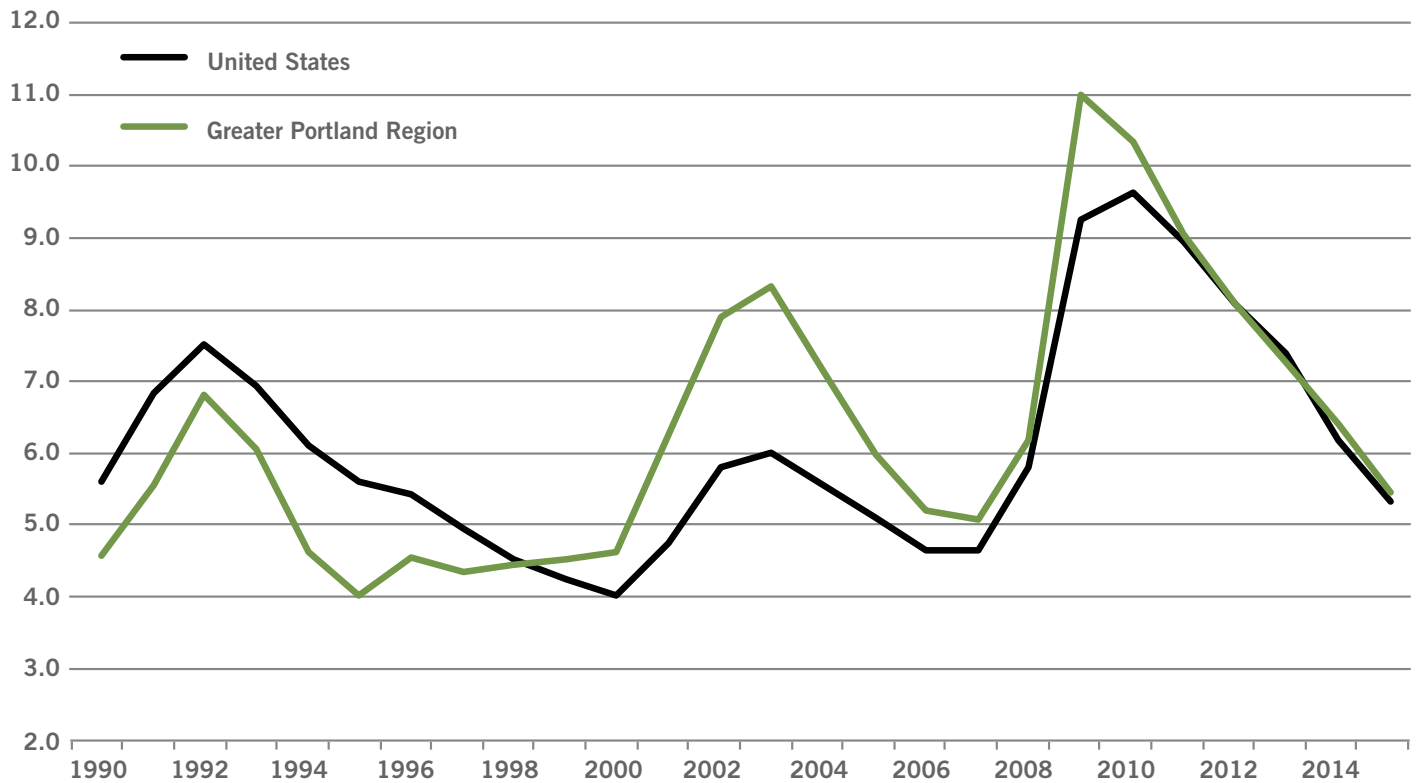
LABOR FORCE PARTICIPATION RATE: AGES 16 TO 21

Source: U.S. Census



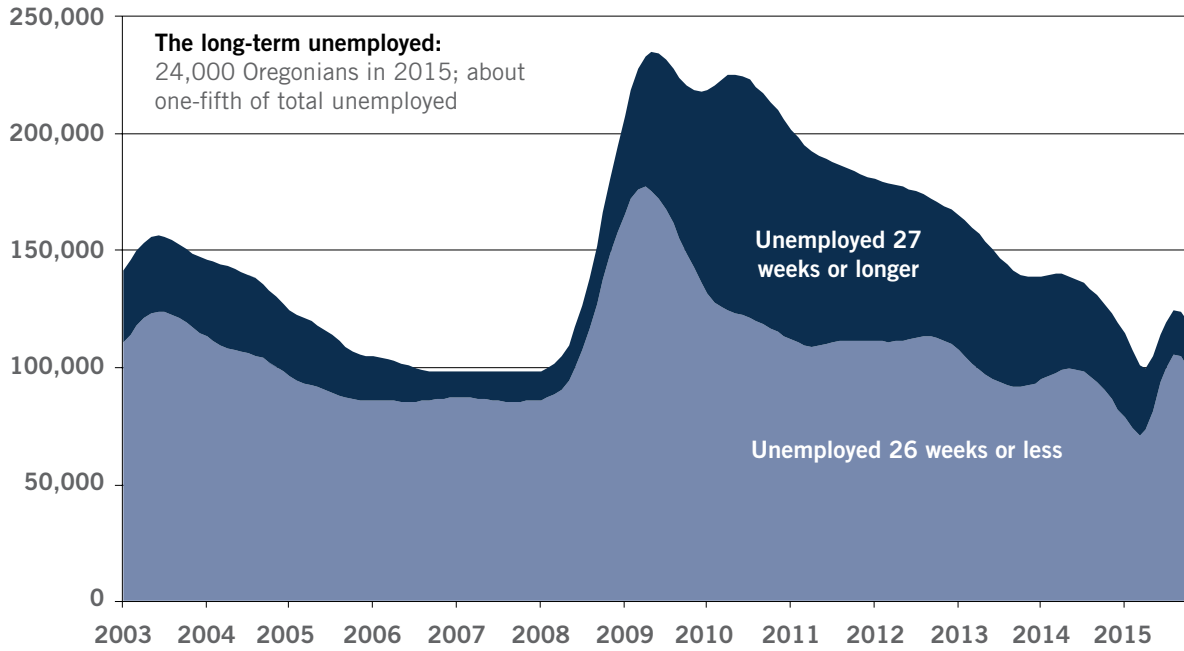
UNEMPLOYMENT RATE: 1990–2015

Source: U.S. Bureau of Labor Statistics, Oregon Employment Department



DURATION OF UNEMPLOYMENT IN OREGON

Source: Oregon Employment Department



UNEMPLOYMENT RATE BY AGE: 2000 AND 2014

Source: U.S. Census

2014							
	16-21	22-24	25-34	35-44	45-54	55-64	65+
United States	18.6%	11.5%	7.6%	5.8%	5.3%	4.9%	4.2%
Greater Portland Region	21.5%	10.8%	7.3%	6.4%	6.0%	4.4%	3.7%
Clackamas	21.0%	8.9%	5.6%	4.7%	6.0%	5.0%	5.9%
Columbia*	27.9%	15.7%	17.2%	7.6%	7.8%	8.5%	13.5%
Multnomah	23.1%	12.2%	7.5%	6.0%	6.8%	5.7%	2.6%
Washington	13.5%	11.3%	6.7%	6.5%	7.0%	3.2%	3.1%
Yamhill	19.9%	7.7%	7.5%	13.1%	3.8%	2.4%	1.7%
Clark	23.0%	7.3%	8.9%	6.1%	4.6%	3.6%	1.9%
Cowlitz	42.6%	20.4%	10.2%	15.6%	5.8%	3.8%	12.4%
Skamania*	40.0%	12.8%	10.9%	8.1%	8.2%	4.7%	11.6%
Wahkiakum*	29.7%	22.2%	11.0%	1.7%	12.3%	13.0%	na

2000							
	16-21	22-24	25-34	35-44	45-54	55-64	65+
United States	16.4%	8.8%	5.2%	4.3%	3.6%	3.5%	5.8%
Greater Portland Region	14.8%	8.4%	5.5%	4.4%	3.9%	3.8%	6.7%
Clackamas	14.2%	9.7%	5.7%	3.4%	3.3%	2.7%	3.7%
Columbia	20.6%	7.9%	5.4%	5.7%	4.1%	3.3%	6.7%
Multnomah	14.8%	8.3%	6.0%	5.6%	4.6%	4.5%	7.0%
Washington	12.0%	7.0%	4.0%	3.2%	3.1%	4.2%	6.4%
Yamhill	18.3%	9.1%	6.0%	3.7%	3.3%	3.3%	5.3%
Clark	15.5%	9.1%	5.7%	4.4%	3.7%	3.4%	11.4%
Cowlitz	19.5%	9.5%	7.9%	6.4%	5.7%	3.4%	5.1%
Skamania	26.9%	18.2%	11.3%	7.9%	9.8%	8.7%	6.5%
Wahkiakum	14.0%	26.9%	4.9%	4.8%	8.7%	6.9%	8.8%

*2014 data are 5-year estimate

UNEMPLOYED AND UNEMPLOYMENT RATE

Source: Oregon Employment Department, U.S. Bureau of Labor Statistics

	Greater Portland Region		United States	
	Unemployed	Rate	Unemployed	Rate
2000	51,700	4.6	5,692,000	4.0
2001	70,300	6.2	6,801,000	4.7
2002	89,200	7.9	8,378,000	5.8
2003	94,100	8.3	8,774,000	6.0
2004	80,400	7.1	8,149,000	5.5
2005	67,900	6.0	7,591,000	5.1
2006	60,400	5.2	7,001,000	4.6
2007	60,100	5.1	7,078,000	4.6
2008	75,100	6.2	8,924,000	5.8
2009	135,300	11.0	14,265,000	9.3
2010	129,900	10.3	14,825,000	9.6
2011	113,900	9.0	13,747,000	8.9
2012	100,500	8.1	12,506,000	8.1
2013	88,900	7.3	11,460,000	7.4
2014	79,800	6.4	9,617,000	6.2
2015*	68,300	5.3	8,364,900	5.4

*year-to-date, through November

JOB SEEKERS BY BROAD OCCUPATIONAL GROUP: PORTLAND METRO (OREGON PORTION)

Source: Oregon Employment Department

Occ. Code		
Management, Business, and Financial		
11-0000	Management Occupations	17,963
13-0000	Business and Financial Operations Occupations	9,498
Professional and Related		
15-0000	Computer and Mathematical Science Occupations	8,543
17-0000	Architecture and Engineering Occupations	4,136
19-0000	Life, Physical, and Social Science Occupations	3,134
21-0000	Community and Social Service Occupations	5,586
23-0000	Legal Occupations	854
25-0000	Education, Training, and Library Occupations	5,655
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	7,155
Health Care		
29-0000	Healthcare Practitioner and Technical Occupations	2,652
31-0000	Healthcare Support Occupations	4,125
Service		
33-0000	Protective Service Occupations	2,694
35-0000	Food Preparation and Serving Related Occupations	14,379
37-0000	Building and Grounds Cleaning and Maintenance Workers	5,020
39-0000	Personal Care and Service Occupations	4,608
Sales and Related		
41-0000	Sales and Related Occupations	16,795
Office and Administrative Support		
43-0000	Office and Administrative Support Occupations	52,019
Farming, Fishing, and Forestry		
45-0000	Farming, Fishing, and Forestry Occupations	2,246
Construction and Extraction		
47-0000	Construction and Extraction Occupations	11,564
Installation, Maintenance, and Repair		
49-0000	Installation, Maintenance, and Repair Occupations	8,436
Production		
51-0000	Production Occupations	21,735
Transportation and Material Moving		
53-0000	Transportation and Material Moving Occupations	15,567
Military		413

Notes:

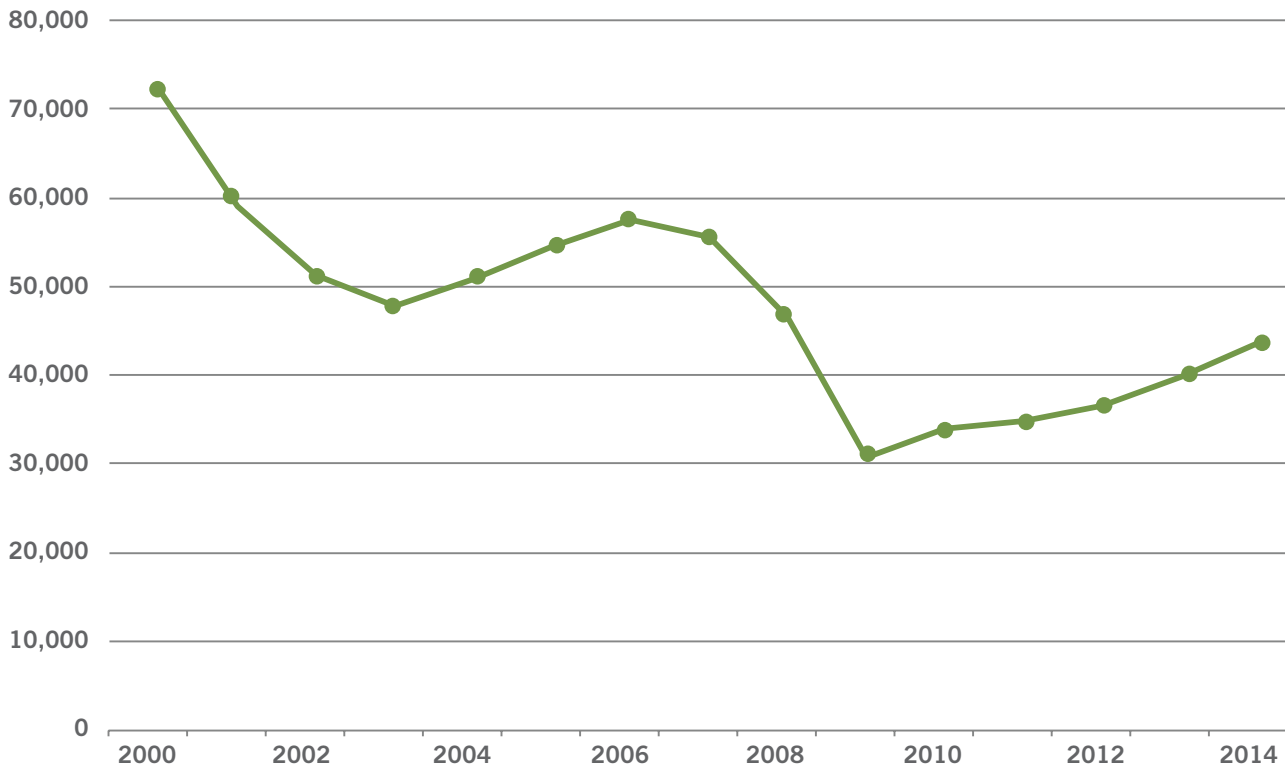
Job seekers living in Columbia, Clackamas, Multnomah, Washington, or Yamhill County Oregon and had an active iMatchSkills account as of 1/01/16

Jobseekers can list more than one occupation

Includes Unemployment Insurance claimants, with some exceptions

YOUTH HIRING (AGES 14–24): 2000–2014 NEW HIRES IN THE GREATER PORTLAND REGION

Source: U.S. Census Bureau Local Employment Household Dynamics



GREATER PORTLAND REGION OPPORTUNITY YOUTH: 2014

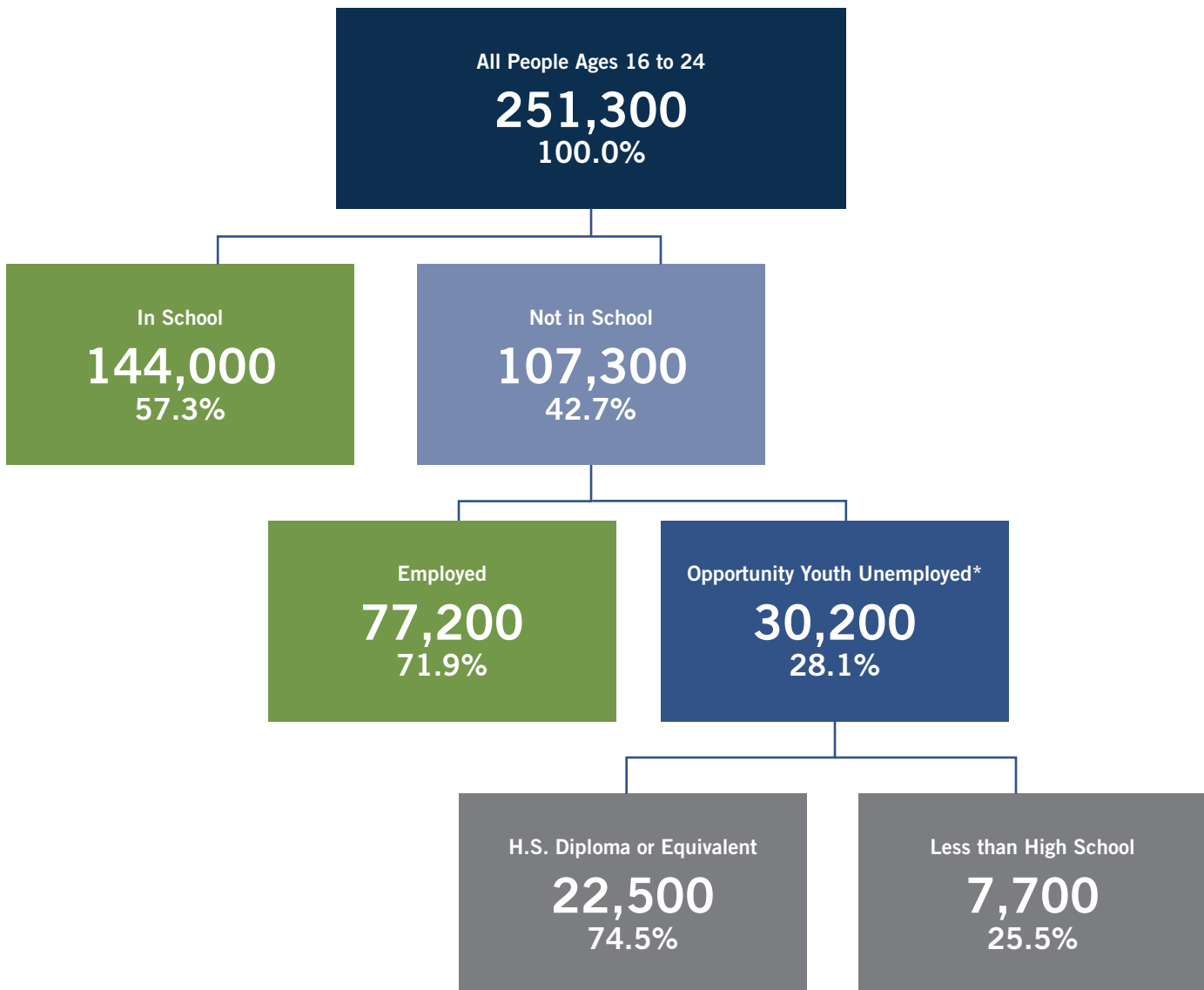
(People ages 16–24, not in school and not employed)

Source: ECONorthwest Analysis of U.S. Census data

Population 16-24		251,300
Not in School		107,300
	Employed	77,200
	Unemployed	30,200
	High School Diploma or Equivalent	22,500
	Less than High School	7,700

IDENTIFYING OPPORTUNITY YOUTH: GREATER PORTLAND REGION, 2014

Source: ECONorthwest Analysis of U.S. Census data



*2014 data are 5-year estimate

YOUTH POPULATION (AGES 16–24): 2000 AND 2014

Source: U.S. Census

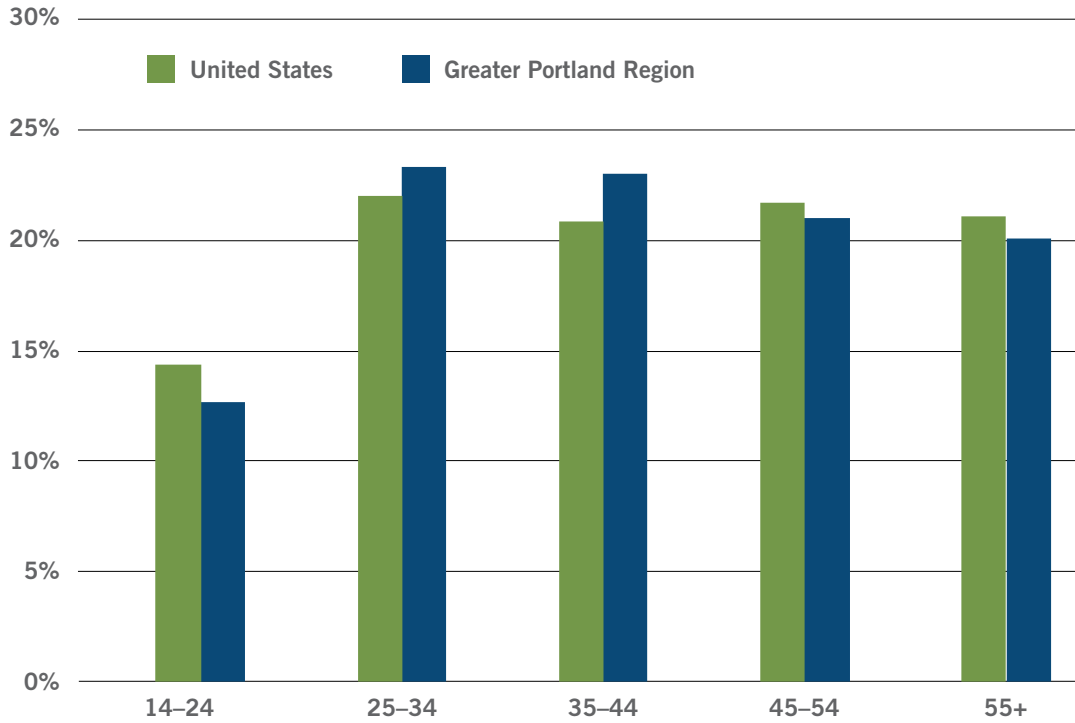
2014							
	Population, 16-24	In Labor Force	Employed	Unemployed	Unemployment Rate	Not in Labor Force	Total Population
Greater Portland Region	268,622	162,414	135,038	27,257	16.8%	106,208	1,958,050
Clackamas	44,013	24,469	20,560	3,851	15.7%	19,544	318,869
Columbia*	5,090	2,879	2,219	660	22.9%	2,211	39,464
Multnomah	79,897	50,495	41,523	8,911	17.6%	29,402	636,606
Washington	61,594	37,660	32,929	4,731	12.6%	23,934	440,959
Yamhill	13,839	8,501	7,103	1,398	16.4%	5,338	81,278
Clark	51,205	30,545	25,343	5,202	17.0%	20,660	350,596
Cowlitz	11,869	6,672	4,598	2,074	31.1%	5,197	81,923
Skamania*	1,186	708	522	186	26.3%	478	9,165
Wahkiakum*	382	221	151	58	26.2%	161	3,436
United States	39,863,323	23,271,368	19,359,586	3,526,938	15.2%	16,591,955	253,588,947

2000							
	Population, 16-24	In Labor Force	Employed	Unemployed	Unemployment Rate	Not in Labor Force	Total Population
Greater Portland Region	240,499	164,471	144,282	19,999	12.2%	76,028	1,563,840
Clackamas	37,212	25,035	21,872	3,139	12.5%	12,177	260,423
Columbia	4,310	2,741	2,285	433	15.8%	1,569	33,035
Multnomah	82,729	57,415	50,568	6,827	11.9%	25,314	529,051
Washington	52,770	37,126	33,448	3,636	9.8%	15,644	338,288
Yamhill	12,296	8,118	6,868	1,250	15.4%	4,178	64,941
Clark	39,162	26,480	22,976	3,454	13.0%	12,682	256,455
Cowlitz	10,627	6,732	5,628	1,073	15.9%	3,895	70,982
Skamania	1,045	603	457	146	24.2%	442	7,602
Wahkiakum	348	221	180	41	18.6%	127	3,063
United States	34,956,438	22,281,754	18,889,736	2,941,770	13.2%	12,674,684	217,168,077

*2014 data are 5-year estimate

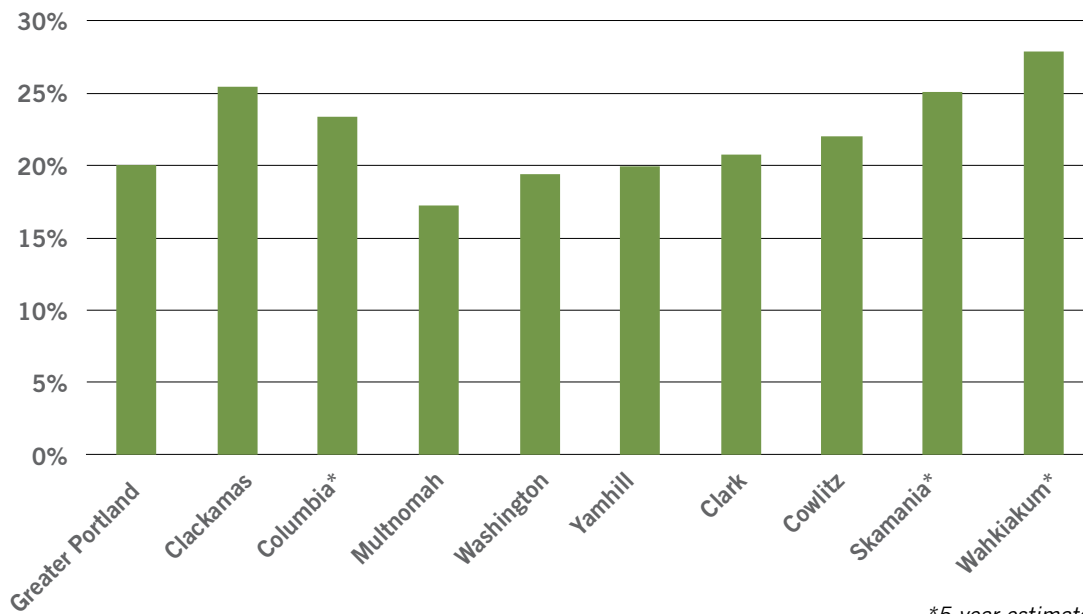
SHARE OF WORKFORCE BY AGE: 2014

Source: U.S. Census



SHARE OF WORKFORCE AGES 55+: 2014

Source: U.S. Census



*5-year estimates

EMPLOYMENT BY BROAD INDUSTRY, GREATER PORTLAND REGION, AGES 55+: 2014

Source: U.S. Census, Longitudinal Employer-Household Dynamics

	55+ Employment	Share of 55+	Share of Industry's Employment
Health Care and Social Assistance	34,474	14.5%	23.3%
Manufacturing	29,093	12.2%	23.5%
Education (private and public)	25,936	10.9%	27.3%
Retail Trade	20,108	8.5%	17.9%
Professional, Sci., & Tech. Svcs.	14,156	6.0%	20.5%
Wholesale Trade	13,644	5.7%	23.9%
Administrative and Waste Mgmt. Svcs.	13,531	5.7%	19.7%
Accommodation and Food Services	12,516	5.3%	13.2%
Construction	11,686	4.9%	19.8%
Transportation and Warehousing	9,949	4.2%	27.1%
Other Services	9,937	4.2%	24.2%
Finance and Insurance	9,192	3.9%	21.3%
Public Administration	7,987	3.4%	26.4%
Management of Companies	7,032	3.0%	20.1%
Real Estate & Rental & Leasing	4,816	2.0%	26.7%
Information	4,794	2.0%	18.7%
Ag., Forestry, Fishing, Hunting	4,381	1.8%	30.5%
Arts, Entertainment, and Recreation	3,065	1.3%	17.2%
Utilities	1,230	0.5%	31.1%
Mining and Quarrying	231	0.1%	31.6%
All Sectors	237,756	100.0%	21.7%

INDUSTRIES WITH SIGNIFICANT NEAR-RETIREE EMPLOYMENT COMPARED TO YOUTH EMPLOYMENT GREATER PORTLAND REGION: 2014 (ALL OWNERSHIPS)

Source: U.S. Census, Longitudinal Employer-Household Dynamics

	Ages 55+		Ages 14-24	
	#	Share of Industry Emp.	#	Share of Industry Emp.
Educational Services (private and public)	25,936	27.3%	4,537	4.8%
Professional, Scientific, and Technical Services	14,156	20.5%	3,696	5.4%
Administrative and Support Services	12,871	19.6%	8,600	13.1%
Ambulatory Health Care Services	12,015	22.2%	3,258	6.0%
Food Services and Drinking Places	10,601	12.5%	23,580	27.7%
Social Assistance	8,925	25.7%	3,386	9.7%
Hospitals	8,085	25.3%	930	2.9%
Specialty Trade Contractors	7,377	19.2%	3,400	8.8%
Management of Companies	7,032	20.1%	2,091	6.0%
Computer and Electronic Product Manufacturing	6,921	20.4%	1,005	3.0%
Merchant Wholesalers, Durable Goods	6,608	24.9%	1,458	5.5%
Nursing and Residential Care Facilities	5,449	20.1%	4,539	16.8%
Religious, Grantmaking, Civic, Professional Organizations	5,205	30.9%	1,358	8.1%
Insurance Carriers and Related Activities	4,391	23.8%	560	3.0%
Real Estate	4,033	27.7%	984	6.8%
Executive, Legislative, and Other Govt. Support	3,964	26.5%	690	4.6%
Food and Beverage Stores	3,947	16.6%	4,829	20.3%
Merchant Wholesalers, Nondurable Goods	3,793	21.3%	1,360	7.6%
Credit Intermediation and Related Activities	3,472	18.2%	1,468	7.7%
Truck Transportation	3,416	31.0%	501	4.5%
Wholesale Electronic Markets and Agents and Brokers	3,243	25.4%	450	3.5%
Fabricated Metal Product Manufacturing	2,986	24.0%	884	7.1%
Crop Production	2,969	32.2%	845	9.2%
Construction of Buildings	2,861	20.9%	990	7.2%
Food Manufacturing	2,854	21.9%	1,393	10.7%
Total, all industries	237,756	21.7%	114,063	10.4%

POPULATION SPEAKING ENGLISH WELL OR AT ALL: 2013

Source: U.S. Census

	United States	Portland Metro Area	Clackamas	Multnomah	Washington	Clark County
Total Population 5 Years and Older	296,358,760	2,173,565	367,515	720,064	518,102	415,114
Speak English "not well"	9,106,482	64,518	7,394	26,355	17,302	10,849
Speak English "not at all"	4,159,978	25,247	2,071	11,932	7,847	2,251
5-17						
Population	53,816,533	386,701	66,496	106,615	99,901	85,125
Speak English "not well"	631,146	4,961	1,032	1,243	1,398	1,217
Speak English "not at all"	111,481	1,348	234	177	806	121
18-64						
Population	197,878,237	1,489,948	240,353	524,222	354,759	271,725
Speak English "not well"	7,079,980	53,001	5,316	22,253	14,173	8,712
Speak English "not at all"	2,963,953	18,965	1,355	8,981	6,132	1,575
65+						
Population	44,663,990	296,916	60,666	89,227	63,442	58,264
Speak English "not well"	1,395,356	6,556	1,046	2,859	1,731	920
Speak English "not at all"	1,084,544	4,934	482	2,774	909	555

SHARE OF POPULATION 5 YEARS AND OLDER NOT SPEAKING ENGLISH WELL OR NOT AT ALL: 2013

Source: U.S. Census



PUBLIC SCHOOL STUDENTS: ENGLISH LEARNERS

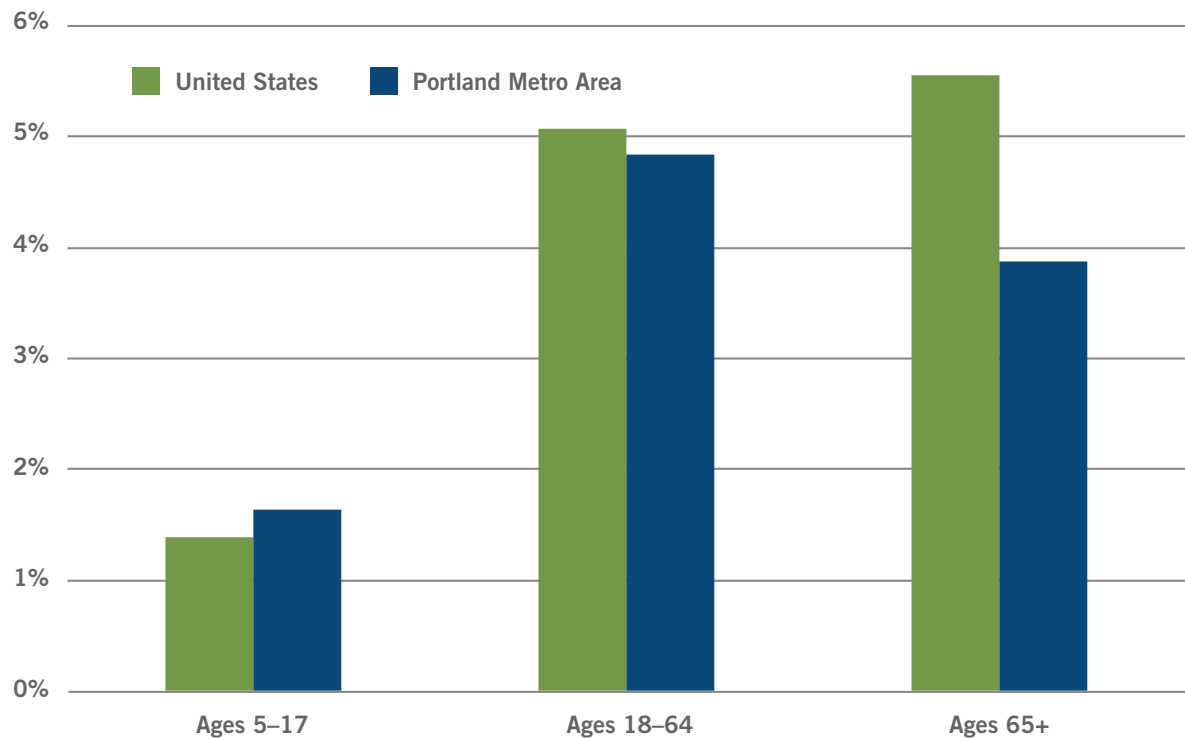
Source: Oregon Department of Education, Washington Office of Superintendent of Public Education,
National Center for Education Statistics

County	2000-2001			2014-2015		
	Total Students	English Learners	% of Total Enrollment	Total Students	English Learners	% of Total Enrollment
Greater Portland Region	330,607	26,429	8.0%	356,901	38,857	10.9%
Clackamas	54,691	3,782	6.9%	58,792	3,970	6.8%
Columbia	8,600	13	0.2%	7,684	102	1.3%
Multnomah	93,278	11,055	11.9%	93,009	13,171	14.2%
Washington	73,195	6,996	9.6%	86,479	11,956	13.8%
Yamhill	15,473	1,254	8.1%	16,625	1,596	9.6%
Clark	65,862	3,320	5.0%	76,060	7,207	9.5%
Cowlitz	17,705	unavailable		16,684	813	4.9%
Skamania	1,294	9	0.7%	1,122	26	2.3%
Wahkiakum	509	unavailable		446	16	3.6%

Columbia, Clark, and Skamania 2000 data for English Learners unavailable; estimated based on 2001 ratios

POPULATION NOT SPEAKING ENGLISH WELL OR AT ALL BY AGE: 2013

Source: U.S. Census



LANGUAGES, OTHER THAN ENGLISH, SPOKEN AT HOME: 2013

Source: U.S. Census

	U.S.	Greater Portland Region	Clackamas	Multnomah	Washington	Yamhill	Clark	Cowitz
Total:	293,913,098	2,241,284	363,064	711,478	509,992	94,421	409,278	95,683
Speak only English	232,473,314	1,854,443	319,023	571,184	388,653	81,648	351,070	88,836
Spanish or Spanish Creole	38,096,483	182,049	19,994	59,343	64,350	10,503	21,576	4,435
French (including Patois, Creole, Cajun)	2,071,255	8,657	1,166	3,936	1,892	313	1,033	141
German or other West Germanic languages	1,504,523	11,614	1,484	3,709	3,485	373	2,023	262
Slavic languages	2,074,052	37,847	5,714	13,626	3,373	96	14,220	697
Other Indo-European languages	5,217,661	29,731	2,540	10,282	11,688	471	4,180	246
Korean	1,128,348	11,042	1,600	1,878	5,770	182	1,520	72
Chinese	2,961,888	23,604	3,784	9,981	6,482	150	2,874	170
Vietnamese	1,431,583	25,190	1,885	14,039	5,290	0	3,824	152
Tagalog	1,633,827	8,043	520	3,007	2,783	80	1,553	54
Other Asian and Pacific Island languages	2,567,477	31,274	3,153	11,341	11,761	366	3,919	551
Other and unspecified languages	2,752,687	17,790	2,201	9,152	4,465	239	1,486	67

Greater Portland Region excludes Wahkiakum

PUBLIC SCHOOL STUDENTS BY RACE, ETHNICITY AND LOW INCOME

Source: Oregon Department of Education, Washington Office of Superintendent of Public Instruction

2014-2015 School Year															
County	Total Students	White		Black		Hispanic		Asian/Pacific Islander		American Indian/Alaska Native		Multi-racial/Unknown		Economically Disadvantaged*	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%
Greater Portland Region	356,901	221,516	62.1%	12,529	3.5%	73,149	20.5%	25,020	7.0%	2,749	0.8%	21,938	6.1%	158,568	44.4%
Clackamas	58,792	42,968	73.1%	607	1.0%	8,621	14.7%	2,803	4.8%	417	0.7%	3,376	5.7%	20,702	35.2%
Columbia	7,684	6,450	83.9%	47	0.6%	571	7.4%	124	1.6%	142	1.8%	350	4.6%	3,481	45.3%
Multnomah	93,009	48,562	52.2%	8,054	8.7%	20,392	21.9%	8,644	9.3%	778	0.8%	6,579	7.1%	50,454	54.2%
Washington	86,479	46,237	53.5%	1,887	2.2%	24,077	27.8%	8,643	10.0%	453	0.5%	5,182	6.0%	33,527	38.8%
Yamhill	16,625	11,311	68.0%	159	1.0%	4,088	24.6%	281	1.7%	366	2.2%	420	2.5%	8,596	51.7%
Clark	76,060	52,382	68.9%	1,629	2.1%	12,475	16.4%	4,239	5.6%	354	0.5%	4,981	6.5%	32,005	42.1%
Cowlitz	16,684	12,346	74.0%	127	0.8%	2,740	16.4%	274	1.6%	210	1.3%	987	5.9%	8,964	53.7%
Skamania	1,122	871	77.6%	16	1.4%	152	13.5%	8	0.7%	26	2.3%	49	4.4%	570	50.8%
Wahkiakum	446	389	87.2%	3	0.7%	33	7.4%	4	0.9%	3	0.7%	14	3.1%	269	60.3%

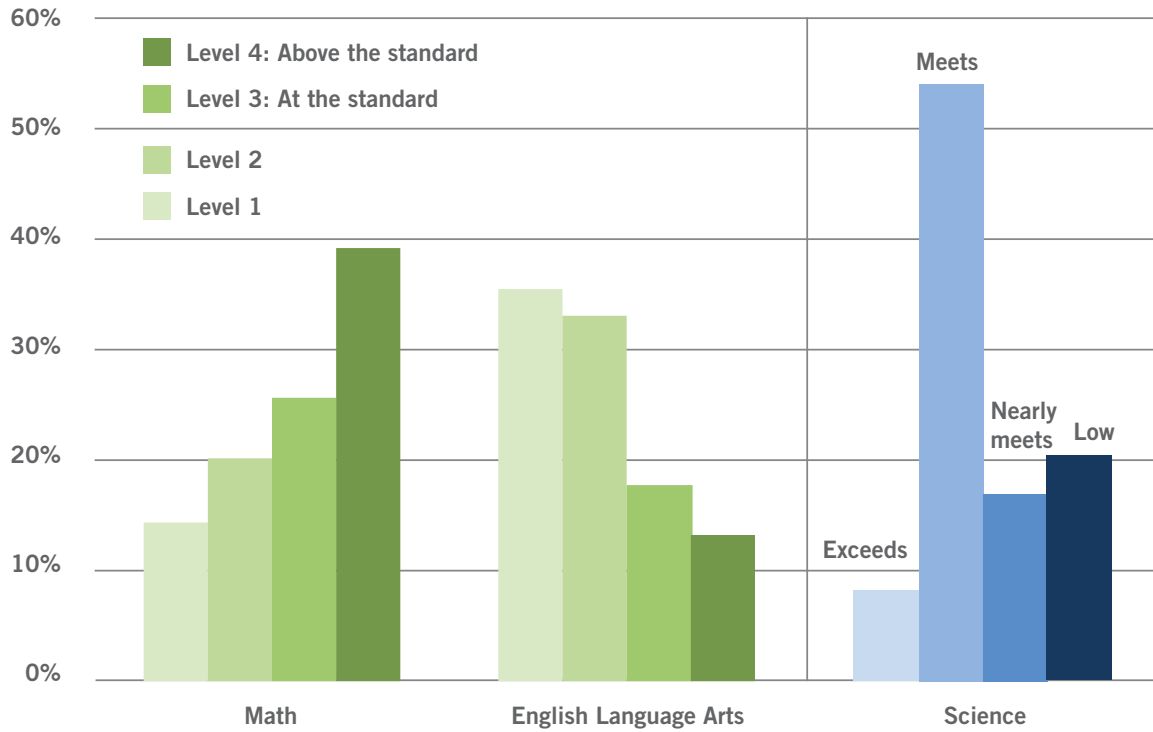
2000-2001 School Year															
County	Total Students	White		Black		Hispanic		Asian/Pacific Islander		American Indian/Alaska Native		Multi-racial/Unknown		Economically Disadvantaged*	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%
Greater Portland Region	330,607	261,691	79.2%	14,723	4.5%	27,968	8.5%	19,269	5.8%	4,301	1.3%	2,009	0.6%	90,491	27.4%
Clackamas	54,691	47,155	86.2%	568	1.0%	2,760	5.0%	1,776	3.2%	400	0.7%	1,925	3.5%	11,063	20.2%
Columbia	8,600	7,981	92.8%	49	0.6%	248	2.9%	146	1.7%	169	2.0%	7	0.1%	2,123	24.7%
Multnomah	93,278	64,580	69.2%	10,305	11.0%	8,637	9.3%	7,640	8.2%	1,654	1.8%	20	0.0%	34,555	37.0%
Washington	73,195	54,983	75.1%	1,525	2.1%	10,023	13.7%	6,054	8.3%	494	0.7%	19	0.0%	15,886	21.7%
Yamhill	15,473	12,859	83.1%	125	0.8%	1,983	12.8%	208	1.3%	260	1.7%	38	0.2%	5,139	33.2%
Clark	65,862	56,827	86.3%	1,951	3.0%	3,190	4.8%	3,031	4.6%	863	1.3%	-	0.0%	21,220	32.2%
Cowlitz	17,705	15,706	88.7%	182	1.0%	1,059	6.0%	378	2.1%	380	2.1%	-	0.0%	unavail.	
Skamania	1,294	1,130	87.3%	10	0.8%	57	4.4%	31	2.4%	66	5.1%	-	0.0%	505	39.0%
Wahkiakum	509	470	92.3%	8	1.6%	11	2.2%	5	1.0%	15	2.9%	-	0.0%	unavail.	

* Eligible for free or reduced price meals

Clark and Skamania 2000 data for Economically Disadvantaged unavailable; estimated based on 2001 ratios

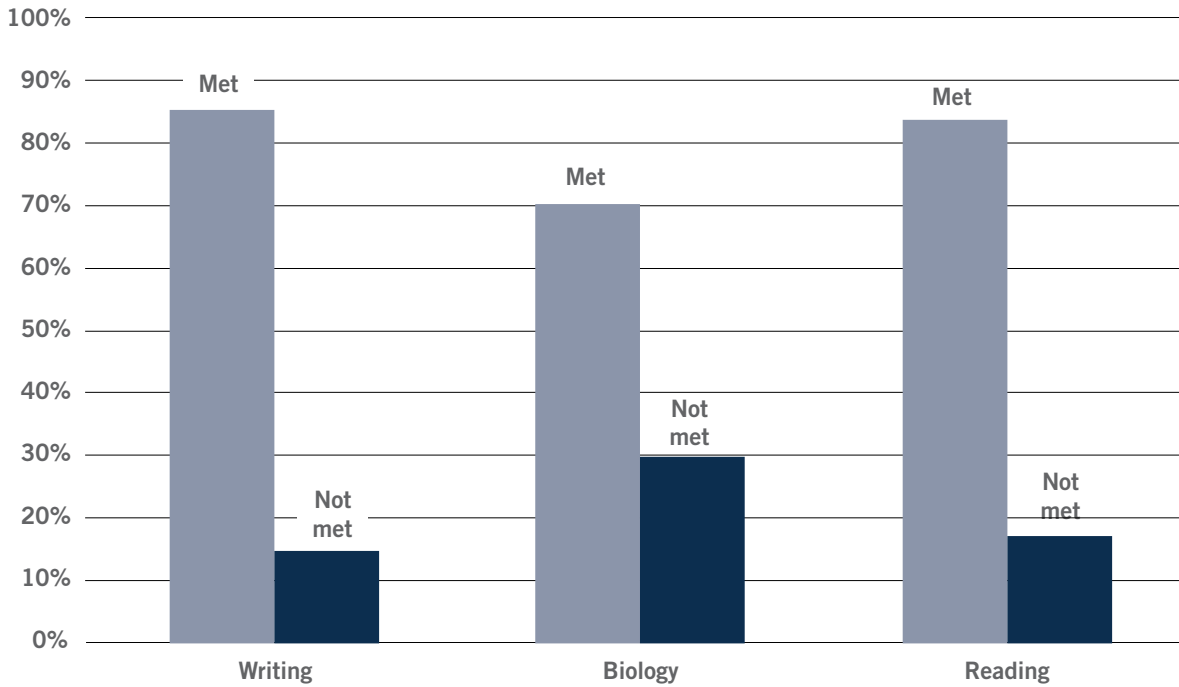
11TH GRADE TEST RESULTS, PORTLAND METRO AREA (OR PORTION): 2014-2015 SCHOOL YEAR

Source: Oregon Dept. of Education



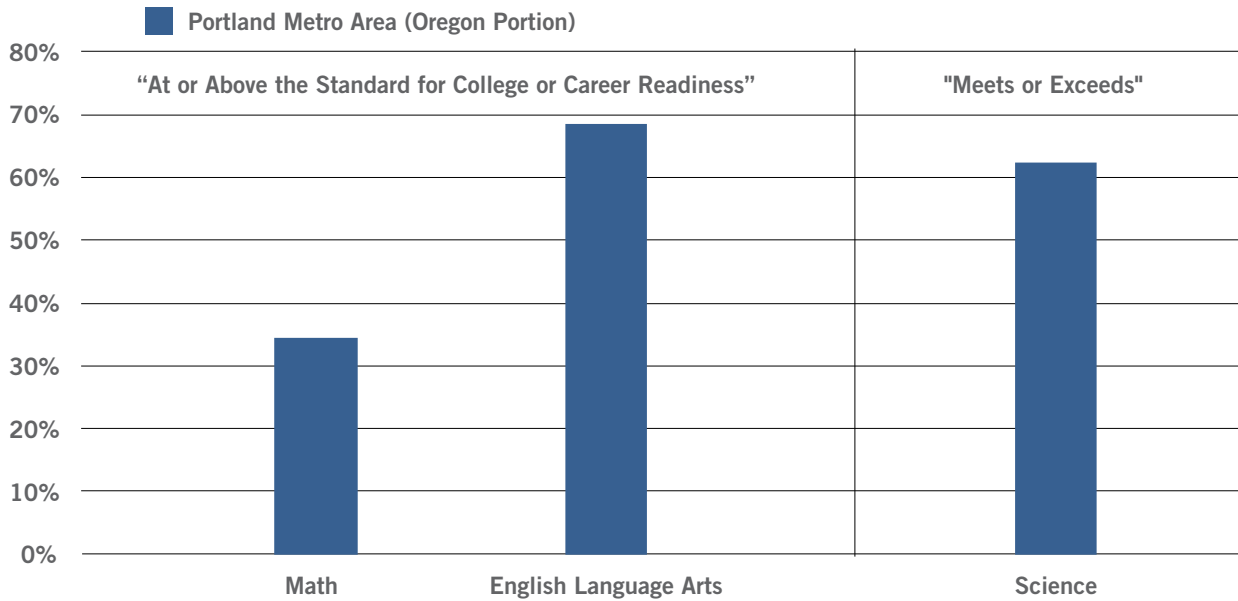
10TH GRADE TEST RESULTS, SW WASHINGTON: 2014-2015 SCHOOL YEAR

Source: Washington Office of Superintendent of Public Instruction



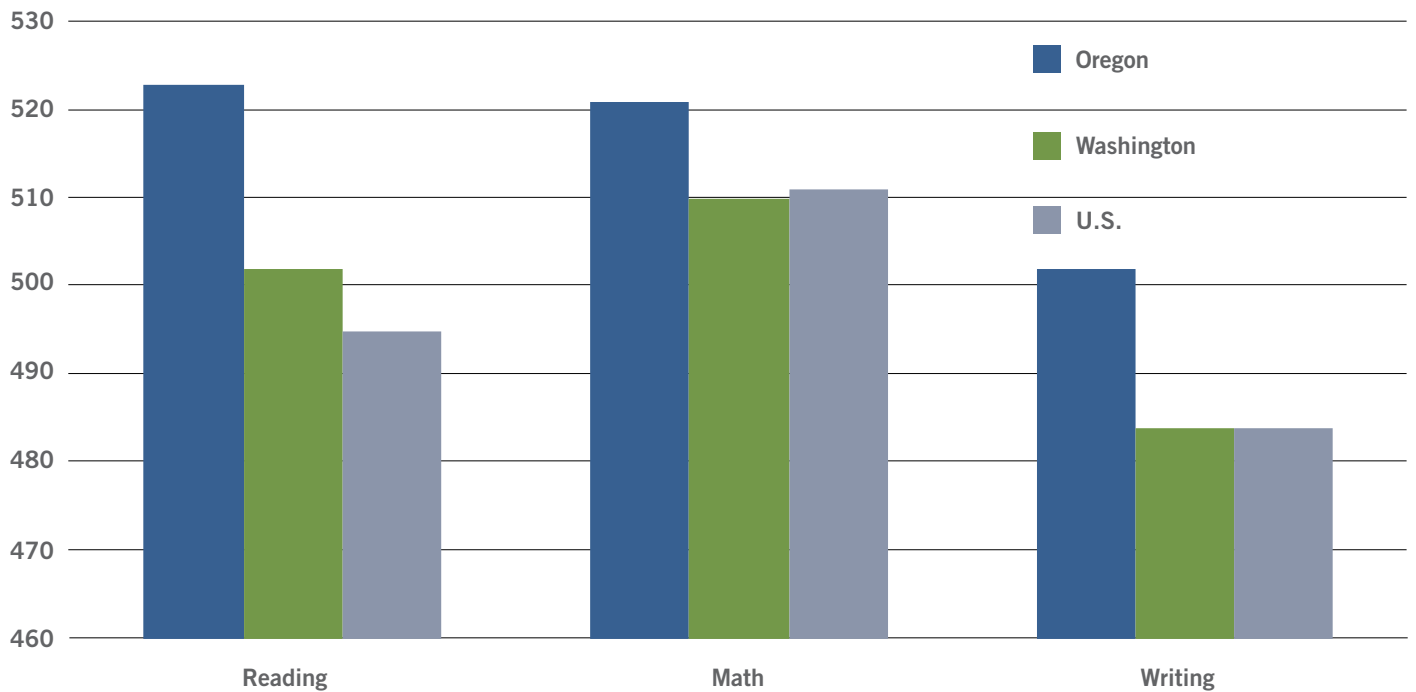
11TH GRADE TEST RESULTS, PORTLAND METRO AREA (OR PORTION): 2014-2015 SCHOOL YEAR

Source: Oregon Dept. of Education



AVERAGE SAT SCORES: 2014-2015 SCHOOL YEAR

Source: The College Board



HIGH SCHOOL GRADUATION AND NON-COMPLETER RATES: 2013-2014 FOUR-YEAR COHORT

Source: Oregon Dept. of Education

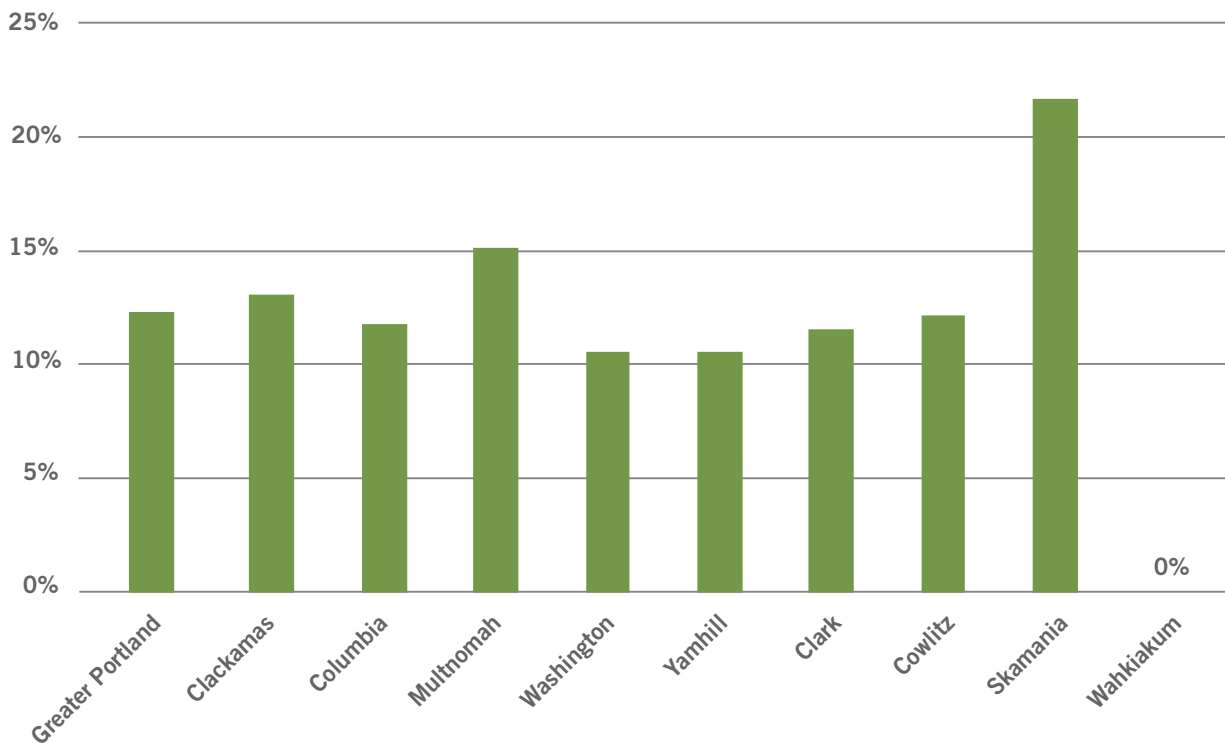
	Cohort	Regular HS Diploma	Graduation Rate (regular diploma)*	Dropout Rate **
Greater Portland Region	27,861	21,341	76.6%	12.3%
Clackamas	5,125	3,872	75.6%	13.1%
Columbia	681	537	78.9%	11.7%
Multnomah	6,874	4,856	70.6%	15.1%
Washington	6,484	5,255	81.0%	9.8%
Yamhill	1,276	983	77.0%	10.6%
Clark	6,008	4,721	78.6%	11.5%
Cowlitz	1,284	1,019	79.4%	12.1%
Skamania	97	67	69.1%	21.6%
Wahkiakum	32	31	96.9%	0.0%

* Does not include other completers (Adult HS diploma, GED, Modified diploma, Extended diploma)

**Students who either dropped out or completed 4 years of high school but did not graduate and did not enroll in 2014-2015 (Oregon).

DROPOUT RATE: 2013–2014 FOUR-YEAR COHORT

Source: Oregon Dept. of Education, Washington Office of Superintendent of Public Instruction



HIGH SCHOOL GRADUATION RATES: 2013-2014 FOUR-YEAR COHORT COMPLETER RATE

Source: Oregon Department of Education; Washington State Office of Superintendent of Public Instruction

	Cohort	Diploma*	Graduation Rate (diploma)	Other Completers**	Completer Rate	Noncompleters***	Noncompleter Rate
Greater Portland Region	27,861	21,341	76.6%	675	79.0%	3,429	12.3%
Male	14,442	10,459	72.4%	405	75.2%	2,070	14.3%
Female	13,419	10,882	81.1%	270	83.1%	1,360	10.1%
White	18,504	14,725	79.6%	498	82.3%	1,864	10.1%
Black	1,030	645	62.6%	38	66.3%	190	18.4%
Hispanic	4,640	3,045	65.6%	85	67.5%	856	18.4%
Clackamas	5,125	3,872	75.6%	197	79.4%	670	13.1%
Male	2,669	1,892	70.9%	128	75.7%	406	15.2%
Female	2,456	1,980	80.6%	69	83.4%	264	10.7%
White	3,878	3,006	77.5%	162	81.7%	470	12.1%
Black	51	31	60.8%	2	64.7%	11	21.6%
Hispanic	660	402	60.9%	22	64.2%	136	20.6%
Columbia	681	537	78.9%	15	81.1%	80	11.7%
Male	362	273	75.4%	9	77.9%	50	13.8%
Female	319	264	82.8%	6	84.6%	30	9.4%
White	570	452	79.3%	13	81.6%	64	11.2%
Black	3	2	66.7%	-	66.7%	1	33.3%
Hispanic	49	39	79.6%	1	81.6%	7	14.3%
Multnomah	6,874	4,856	70.6%	269	74.6%	1,038	15.1%
Male	3,489	2,282	65.4%	147	69.6%	622	17.8%
Female	3,385	2,574	76.0%	122	79.6%	416	12.3%
White	3,722	2,803	75.3%	173	80.0%	469	12.6%
Black	649	379	58.4%	33	63.5%	129	19.9%
Hispanic	1,260	752	59.7%	39	62.8%	284	22.5%
Washington	6,484	5,255	81.0%	161	83.5%	637	9.8%
Male	3,430	2,655	77.4%	101	80.3%	390	11.4%
Female	3,054	2,600	85.1%	60	87.1%	247	8.1%
White	3,837	3,246	84.6%	120	87.7%	304	7.9%
Black	142	105	73.9%	2	75.4%	19	13.4%
Hispanic	1,559	1,078	69.1%	22	70.6%	254	16.3%
Yamhill	1,276	983	77.0%	33	79.6%	135	10.6%
Male	668	489	73.2%	20	76.2%	86	12.9%
Female	608	494	81.3%	13	83.4%	49	8.1%
White	921	714	77.5%	30	80.8%	88	9.6%
Black	16	9	56.3%	1	62.5%	2	12.5%
Hispanic	247	196	79.4%	1	79.8%	27	10.9%

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HIGH SCHOOL GRADUATION RATES: 2013-2014 FOUR-YEAR COHORT COMPLETER RATE (CONTINUED)

	Cohort	Diploma*	Graduation Rate (diploma)	Other Completers**	Completer Rate	Noncompleters***	Noncompleter Rate
Clark	6,008	4,721	78.6%		78.6%	692	11.5%
Male	3,084	2,310	74.9%		74.9%	410	13.3%
Female	2,924	2,411	82.5%		82.5%	282	9.6%
White	4,463	3,600	80.7%		80.7%	386	8.6%
Black	156	111	71.2%		71.2%	23	14.7%
Hispanic	719	475	66.1%		66.1%	113	15.7%
Cowlitz	1,284	1,019	79.4%		79.4%	156	12.1%
Male	676	517	76.5%		76.5%	93	13.8%
Female	608	502	82.6%		82.6%	63	10.4%
White	1,006	820	81.5%		81.5%	77	7.7%
Black	12	8	66.7%		66.7%	3	25.0%
Hispanic	133	92	69.2%		69.2%	13	9.8%
Skamania	97	67	69.1%		69.1%	21	21.6%
Male	48	26	54.2%		54.2%	13	27.1%
Female	49	41	83.7%		83.7%	8	16.3%
White	80	58	72.5%		72.5%	6	7.5%
Black	1	-	0.0%		0.0%	1	100.0%
Hispanic	8	6	75.0%		75.0%	22	275.0%
Wahkiakum	32	31	96.9%		96.9%	-	0.0%
Male	16	15	93.8%		93.8%	-	0.0%
Female	16	16	100.0%		100.0%	1	6.3%
White	27	26	96.3%		96.3%	-	0.0%
Black	-	-				1	
Hispanic	5	5	100.0%		100.0%		0.0%

* Includes Modified Diploma

** Adult HS Diploma, Extended Diploma, GED

*** Students who either dropped out or completed 4 years of high school but did not graduate and did not enroll in 2014-2015

ENROLLMENT IN CONTINUING EDUCATION, OREGON HIGH SCHOOL GRADUATES: 2012–2013

Source: Oregon Department of Education; Washington Education Research and Data Center

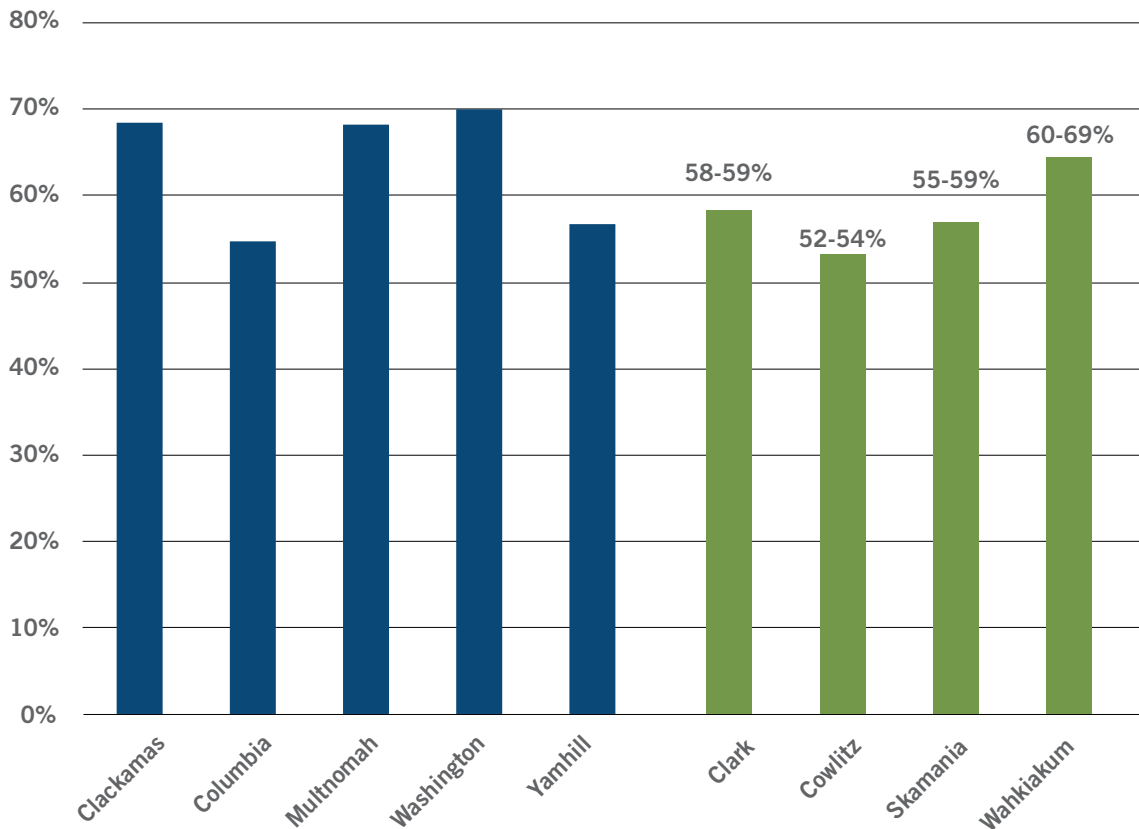
	High School Graduates	Enrollment Rate	Enrollment in Continuing Education
Clackamas	3,492	68.6%	2,395
Columbia	470	54.9%	258
Multnomah	4,623	68.3%	3,156
Washington	5,120	70.0%	3,584
Yamhill	933	56.7%	529
Clark	5,192	58%	3,017-3,040
Cowlitz	1,130	53%	593-609
Skamania	65	57%	36-38
Wahkiakum	33	65%	20-23

Graduates are students receiving regular diplomas (Oregon counties)

Continuing Education: Enrolled in a 2- or 4-year college

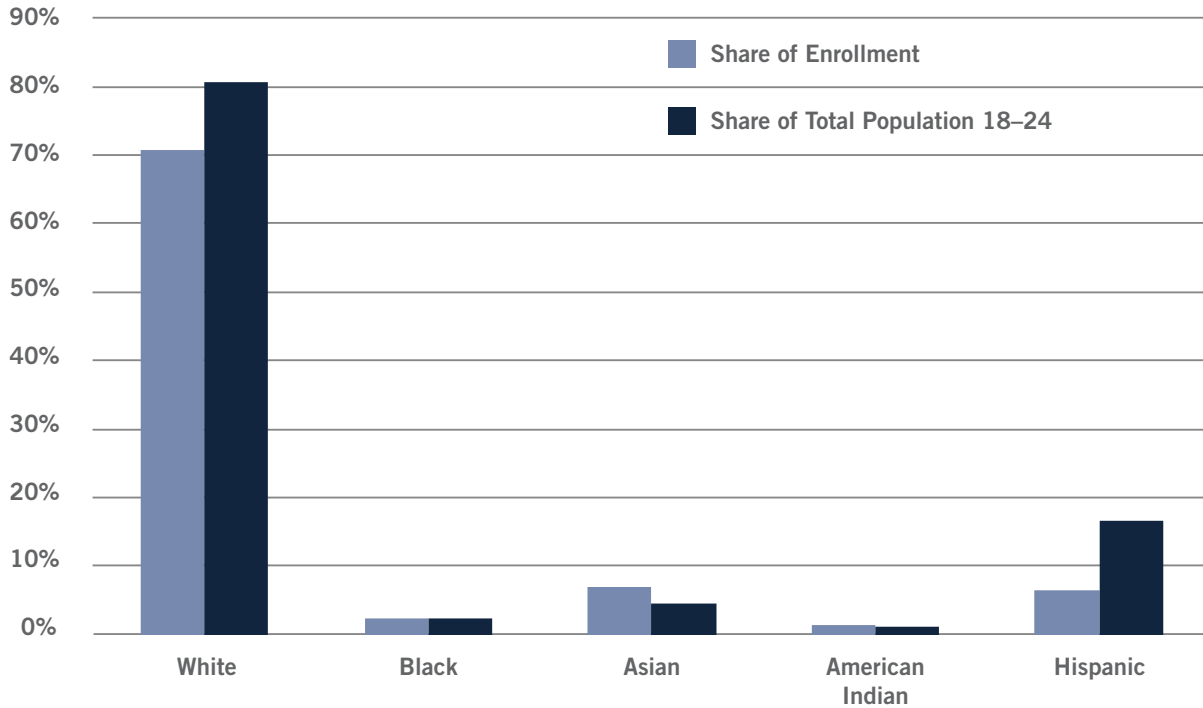
CONTINUING EDUCATION ENROLLMENT RATES GREATER PORTLAND REGION: 2012–2013

Source: Oregon Department of Education, Washington Education Research & Data Center



COMPOSITION OF COLLEGE ENROLLMENT VS. TOTAL POPULATION 2- AND 4-YEAR INSTITUTIONS, OREGON: 2013

Source: National Center for Education Statistics



REMEDIAL EDUCATION, PERCENT OF ENTERING FRESHMEN ENROLLMENT: 2011

Source: Complete College America

	2-Year College	4-Year Flagship College	4-Year Non-Flagship College
Enrolling in Remediation	36.8%	19.9%	11.0%
African American	39.6%	20.2%	21.7%
Hispanic	44.2%	25.6%	15.2%
White	41.0%	20.0%	11.2%
Asian	27.6%	15.4%	6.6%
Ages 17-19	46.8%	19.1%	11.0%
Age 20-24	32.8%	19.4%	10.5%
Ages 25+	40.8%	37.2%	0.0%

GRADUATION RATES OF 2-YEAR, DEGREE-GRANTING INSTITUTIONS PORTLAND-AREA SCHOOLS: 2010 COHORT YEAR

Source: National Center for Education Statistics

Institution name	Student Count	2010 Cohort	Number of completers	Graduation rate*
Clackamas Community College	7,368	574	72	12.5%
Clark College	11,462	632	153	24.2%
Concorde Career College at Portland	925	741	684	92.3%
Everest College at Portland	227	199	75	37.7%
Everest College at Vancouver	324	201	114	56.7%
Heald College, Portland	682	65	22	33.8%
Le Cordon Bleu College of Culinary Arts - Portland	563	329	190	57.8%
Mt. Hood Community College	9,393	1,376	244	17.7%
Portland Community College	32,411	1,247	239	19.2%

* Graduation rates are 150% of normal time (3 years for a 2-year degree)

GRADUATION RATES OF 4-YEAR, DEGREE-GRANTING INSTITUTIONS OREGON AND WASHINGTON SCHOOLS: 2007 COHORT YEAR

Source: National Center for Education Statistics

Institution Name	Student Count	2007 cohort	Number of completers	Graduation rate
Oregon				
Art Institute of Portland	1,348	198	61	30.8%
Concordia University	1,388	182	101	55.5%
Corban University	936	207	110	53.1%
Eastern Oregon University	3,754	314	73	23.2%
George Fox University	2,384	435	271	62.3%
ITT Technical Institute	605	15	1	6.7%
Lewis & Clark College	2,126	506	377	74.5%
Linfield College	1,671	476	323	67.9%
Marylhurst University	741	14	3	21.4%
Mount Angel Seminary	70	19	9	47.4%
Multnomah University	438	70	33	47.1%
New Hope Christian College	179	10	3	30.0%
Northwest Christian University	484	52	23	44.2%
Oregon College of Art and Craft	139	3	1	33.3%
Oregon Institute of Technology	4,366	268	116	43.3%
Oregon State University	23,157	2,974	1,829	61.5%
Pacific Northwest College of Art	413	90	32	35.6%
Pacific University	1,785	372	229	61.6%
Portland State University	22,927	1,427	595	41.7%
Reed College	1,395	337	276	81.9%
Southern Oregon University	5,500	703	258	36.7%
University of Oregon	20,797	3,505	2,331	66.5%
University of Phoenix-Oregon Campus	639	144	29	20.1%
University of Portland	3,494	804	607	75.5%
Warner Pacific College	503	92	29	31.5%
Western Oregon University	5,263	916	407	44.4%
Willamette University	2,119	444	350	78.8%
Washington State				
Art Institute of Seattle	1,573	131	37	28.2%
Central Washington University	10,423	1,478	760	51.4%
City University of Seattle	1272	3	-	0.0%
Cornish College of the Arts	775	173	81	46.8%
DigiPen Institute of Technology	894	166	90	54.2%
Eastern Washington University	11678	1313	593	45.2%
Evergreen State College	4,087	677	385	56.9%
Faith Evangelical College & Seminary	135	6	5	83.3%
Gonzaga University	4,896	1,033	850	82.3%
Heritage University (Wash.)	876	72	11	15.3%

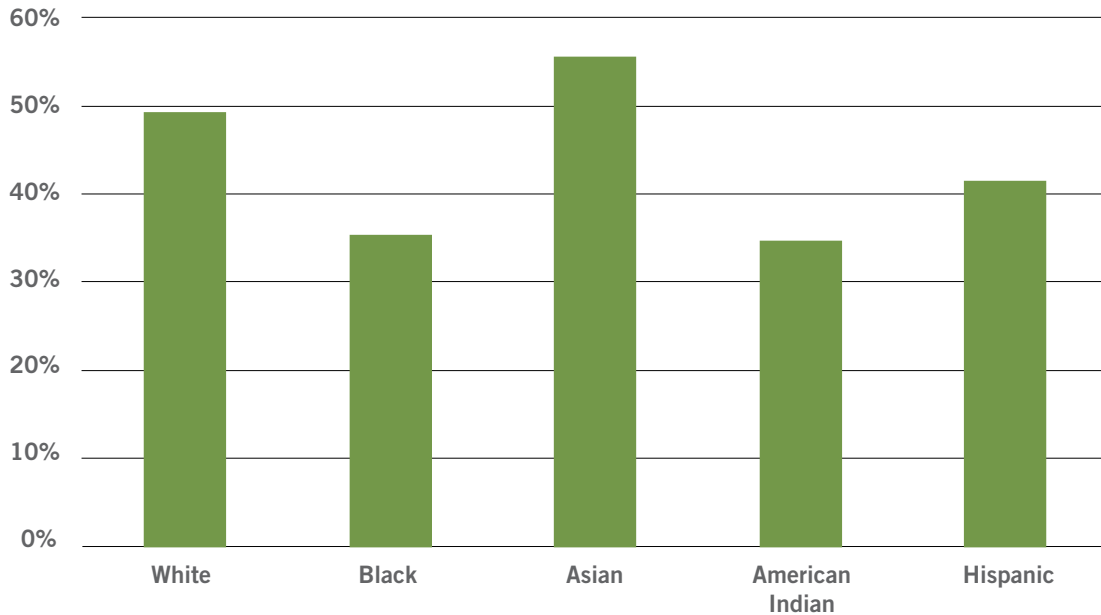
GRADUATION RATES OF 4-YEAR, DEGREE-GRANTING INSTITUTIONS OREGON AND WASHINGTON SCHOOLS: 2007 COHORT YEAR (CONTINUED)

Institution Name	Student Count	2007 cohort	Number of completers	Graduation rate
Intl. Acad. of Design & Technology-Seattle	384	30	12	40.0%
ITT Technical Institute (Everett, Wash.)	271	6	1	16.7%
ITT Technical Institute (Seattle, Wash.)	297	4	-	0.0%
ITT Technical Institute (Spokane, Wash.)	444	12	3	25.0%
Northwest College of Art	94	36	13	36.1%
Northwest Indian College	681	1	-	0.0%
Northwest University (Wash.)	1,438	177	76	42.9%
Pacific Lutheran University	3,142	714	503	70.4%
Saint Martin's University	1,428	243	116	47.7%
Seattle Pacific University	3,366	716	494	69.0%
Seattle University	4,608	736	564	76.6%
Trinity Lutheran College	194	28	24	85.7%
University of Phoenix-Washington Campus	566	68	13	19.1%
University of Puget Sound	2,544	641	501	78.2%
University of Washington	29,756	5,163	4,223	81.8%
University of Washington-Bothell Campus	4,104	148	100	67.6%
University of Washington-Tacoma Campus	3,626	176	87	49.4%
Walla Walla University	1,686	344	152	44.2%
Washington State University	23,070	3,184	2,086	65.5%
Western Washington University	14,026	2,572	1,782	69.3%
Whitman College	1,541	400	351	87.8%
Whitworth University	2,358	532	393	73.9%
Antioch University-Seattle	230	na	na	na
Argosy University-Seattle	153	na	na	na
Bellevue College	13,820	na	na	na
Centralia College	3,453	na	na	na
Columbia Basin College	6,480	na	na	na
Lake Washington Technical College	3,819	na	na	na
North Seattle Community College	6,118	na	na	na
Olympic College	7,329	na	na	na
Peninsula College	2,405	na	na	na
Seattle Central Community College	7,110	na	na	na
South Seattle Community College	4,951	na	na	na

* Graduation rates are 150% of normal time (6 years for a 4-year degree)

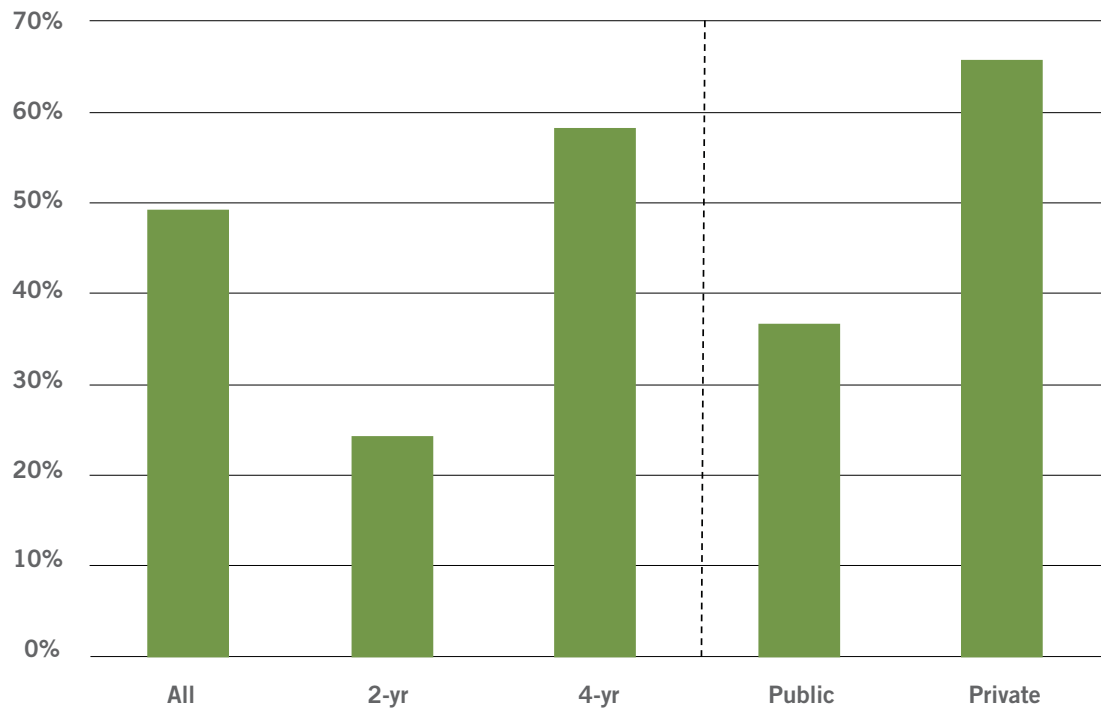
COLLEGE COMPLETION RATES BY ETHNICITY, OREGON 2- AND 4-YEAR COLLEGES: 2013

Source: National Center for Education Statistics



COLLEGE COMPLETION RATES BY TYPE OF INSTITUTION, OREGON: 2013

Source: National Center for Education Statistics



FIELDS OF BACHELOR'S DEGREES OF POPULATION 25 AND OLDER: 2014

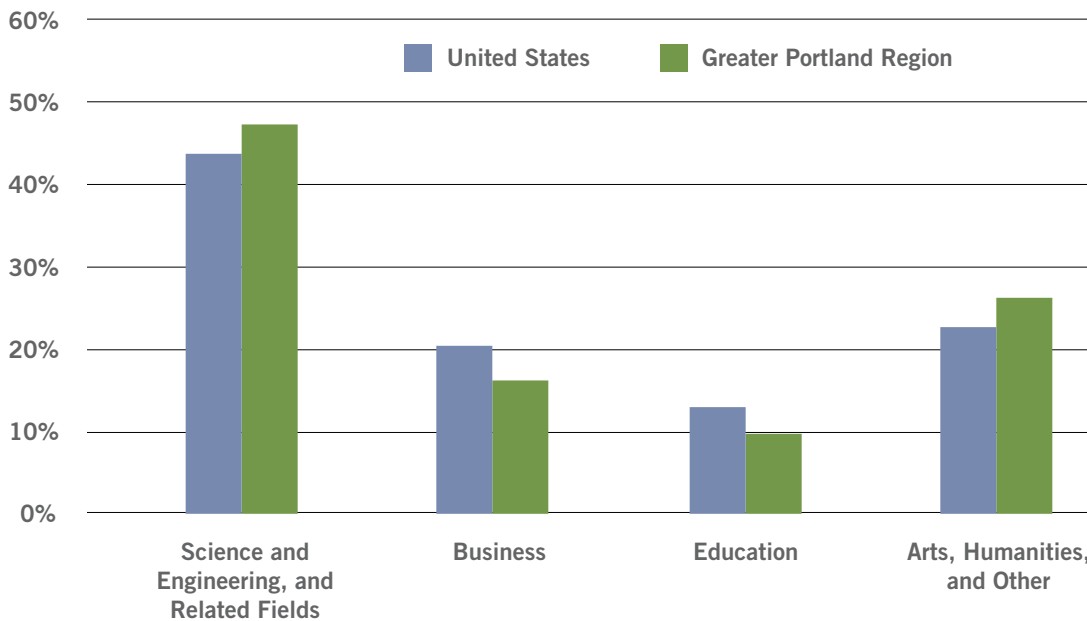
Source: U.S. Census Bureau

	Greater Portland Region	United States
Number		
Total, Population 25 Years and Older	588,086	64,255,026
Science and Engineering	233,007	22,277,659
Computers, Mathematics and Statistics	22,818	2,839,305
Biological, Agricultural, and Environmental Sciences	40,619	3,943,346
Physical and Related Sciences	21,293	2,109,399
Psychology	33,028	3,018,445
Social Sciences	62,615	4,941,702
Engineering	47,436	5,004,316
Multidisciplinary Studies	5,198	421,146
Science and Engineering Related Fields	45,237	5,922,912
Business	95,707	13,116,144
Education	58,070	8,345,701
Arts, Humanities, and Other	156,065	14,592,610
Literature and Languages	31,791	2,760,995
Liberal Arts and History	37,799	3,242,151
Visual and Performing Arts	35,160	2,600,701
Communications	23,020	2,470,219
Other	28,295	3,518,544
Percent		
Science and Engineering	39.6%	34.7%
Computers, Mathematics and Statistics	3.9%	4.4%
Biological, Agricultural, and Environmental Sciences	6.9%	6.1%
Physical and Related Sciences	3.6%	3.3%
Psychology	5.6%	4.7%
Social Sciences	10.6%	7.7%
Engineering	8.1%	7.8%
Multidisciplinary Studies	0.9%	0.7%
Science and Engineering Related Fields	7.7%	9.2%
Business	16.3%	20.4%
Education	9.9%	13.0%
Arts, Humanities, and Other	26%	22%
Literature and Languages	5%	4.0%
Liberal Arts and History	6%	5.0%
Visual and Performing Arts	6%	4.0%
Communications	4%	4.0%
Other	5%	5.0%

Greater Portland Region excludes Wahkiakum

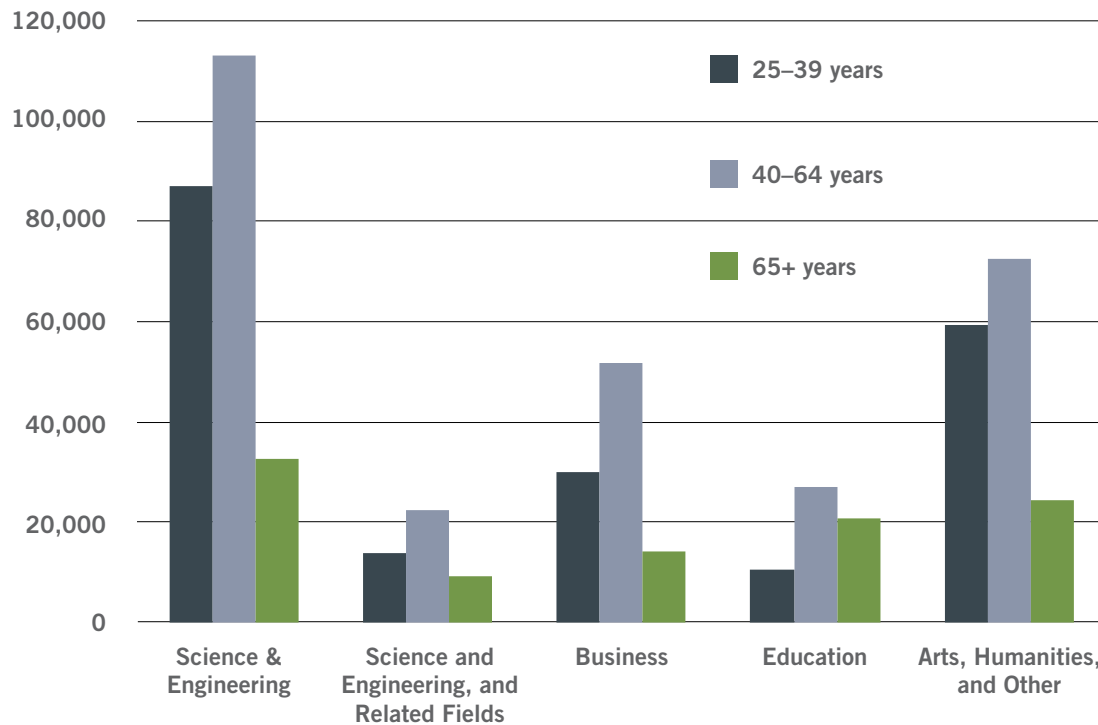
FIELDS OF BACHELOR'S DEGREE, POPULATION 25 AND OLDER: 2014

Source: U.S. Census



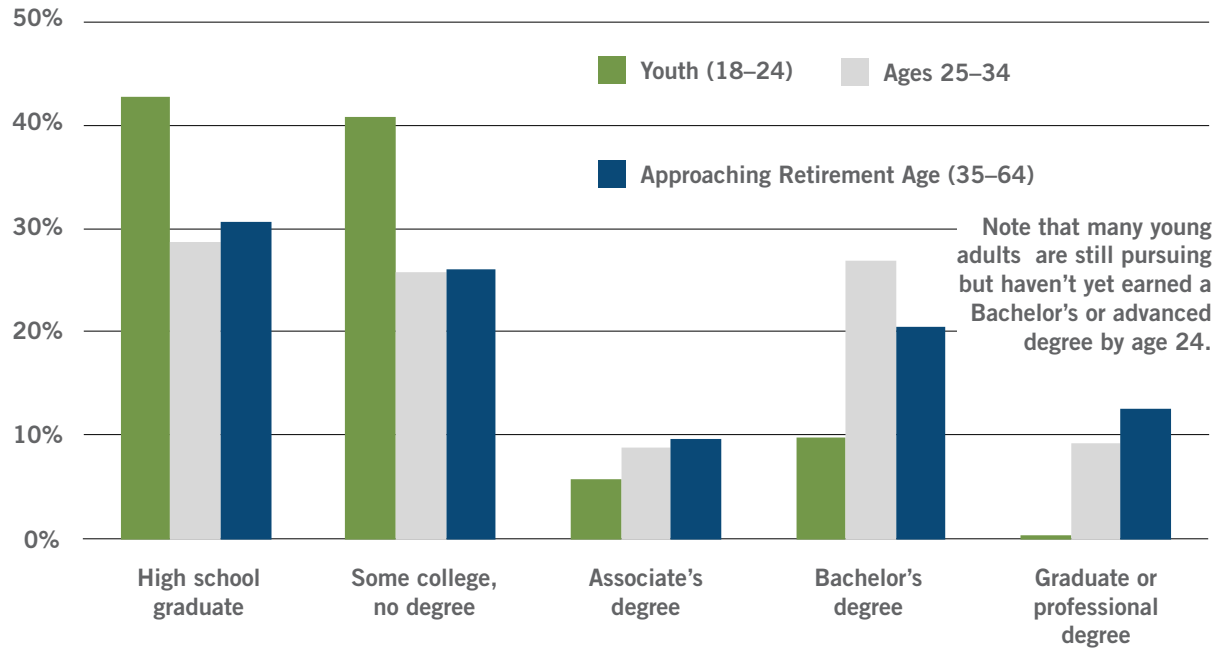
FIELD OF BACHELOR DEGREE BY AGE, GREATER PORTLAND REGION: 2014

Source: U.S. Census



EDUCATION OF YOUTH COMPARED TO OLDER ADULTS, GREATER PORTLAND REGION: 2014

Source: U.S. Census



EDUCATIONAL ATTAINMENT OVER TIME

Source: U.S. Census

	Greater Portland Region	
	2000	2014
Less than High School	13.0%	9.2%
High School Diploma	24.3%	21.9%
Some College	27.7%	25.4%
Associate Degree	7.0%	8.7%
Bachelor's Degree and Above	28.0%	34.8%

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EDUCATIONAL ATTAINMENT OVER TIME

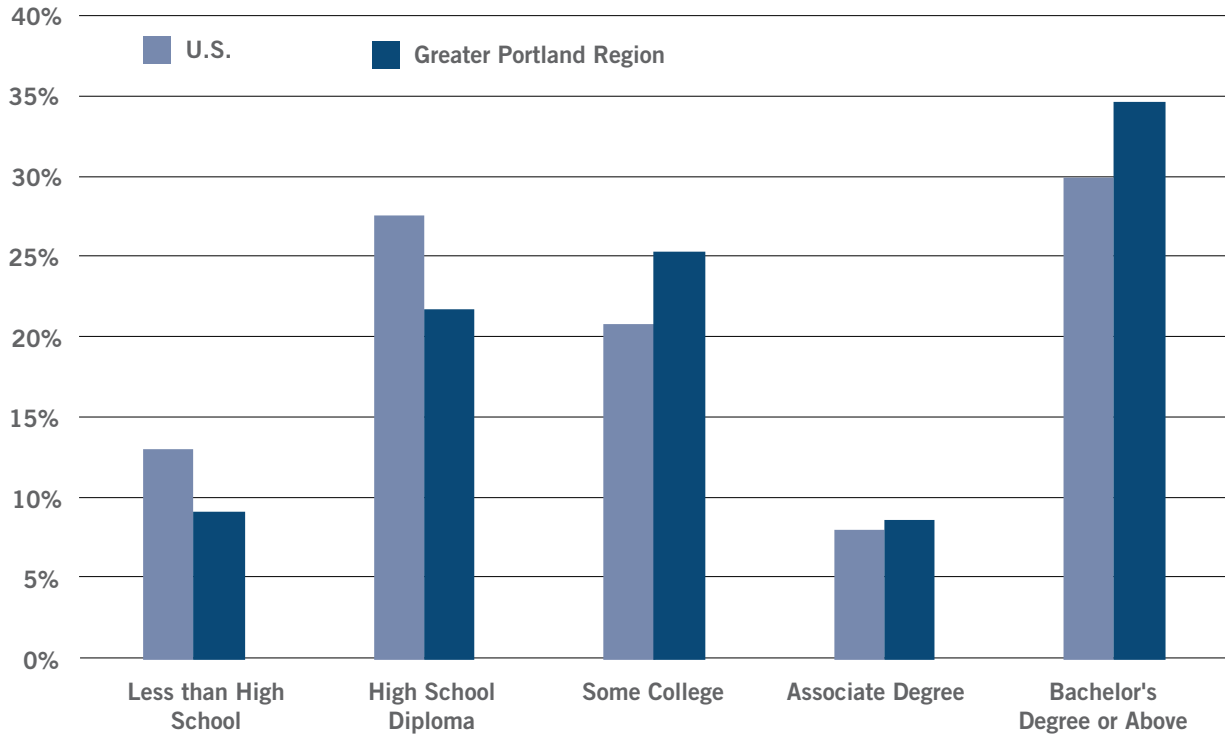
Source: U.S. Census

2014												
	U.S.	Greater Portland Region	Clackamas	Columbia*	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania*	Wahkiakum*	
Population 25 yrs. and over	213,725,624	1,689,428	274,856	34,374	556,709	379,365	67,439	299,391	70,054	7,979	3054	
Less than High School	27,992,034	155,632	19,827	3,560	49,406	37,024	10,234	25,291	9,282	772	223	
High School Diploma	59,249,552	369,399	63,376	11,690	102,676	75,075	18,098	75,791	20,443	2,288	1074	
Some College	44,799,481	429,131	75,058	10,173	128,678	85,716	16,861	86,151	23,779	2,549	1028	
Associate Degree	17,429,531	147,180	25,279	3,072	44,565	31,006	5,245	31,587	6,287	659	305	
Bachelor's degree	39,864,014	374,998	59,807	3,984	143,984	95,825	10,973	53,475	6,245	1,057	310	
Master's degree	17,358,365	152,381	22,464	1,538	60,315	39,161	4,656	20,377	3,354	455	108	
Professional school degree	4,162,695	37,030	6,293	201	17,845	7,292	722	4,230	424	107	4	
Doctorate degree	2,869,952	23,677	2,752	156	9,240	8,266	650	2,489	240	92	2	
2000												
	U.S.	Greater Portland Region	Clackamas	Columbia	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania	Wahkiakum	
Population 25 yrs. and over	182,211,639	1,323,341	223,211	28,725	446,322	285,518	52,645	217,293	60,355	6,557	2715	
Less than High School	35,715,625	171,738	24,674	4,149	64,087	31,670	9,064	26,578	10,160	927	429	
High School Diploma	52,168,981	321,753	53,824	10,101	102,814	57,379	16,235	58,574	19,760	2,193	873	
Some College	38,351,595	366,329	65,811	8,391	115,207	76,994	13,752	66,024	17,396	1,908	846	
Associate Degree	11,512,833	92,417	15,571	2,060	27,386	20,926	2,737	18,120	5,023	428	166	
Bachelor's degree	28,317,792	247,110	42,207	2,825	89,711	67,657	7,042	31,596	5,048	764	260	
Master's degree	10,770,947	84,482	14,293	857	30,394	21,657	2,692	12,274	1,987	234	94	
Professional school degree	3,619,535	27,241	5,178	246	11,675	5,589	676	2,970	804	69	34	
Doctorate degree	1,754,331	12,271	1,653	96	5,048	3,646	447	1,157	177	34	13	

*2014 5-year estimates

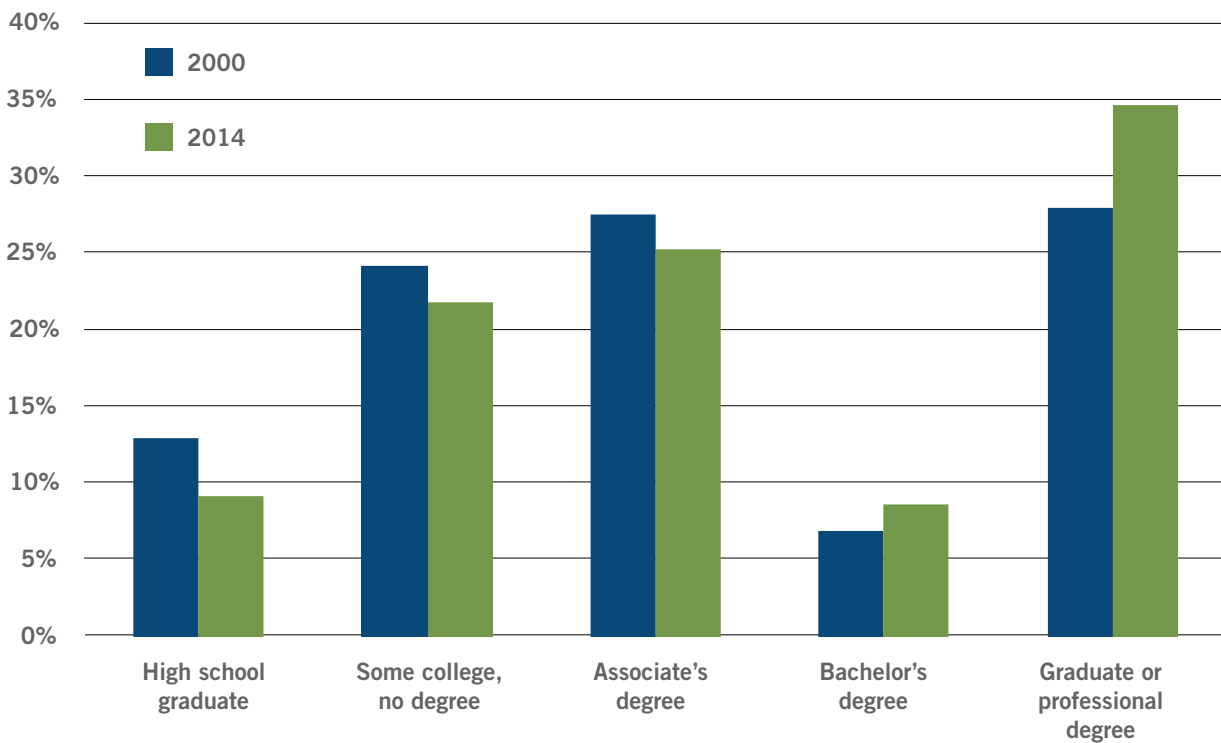
POPULATION 25+ BY EDUCATIONAL ATTAINMENT, 2014

Source: U.S. Census



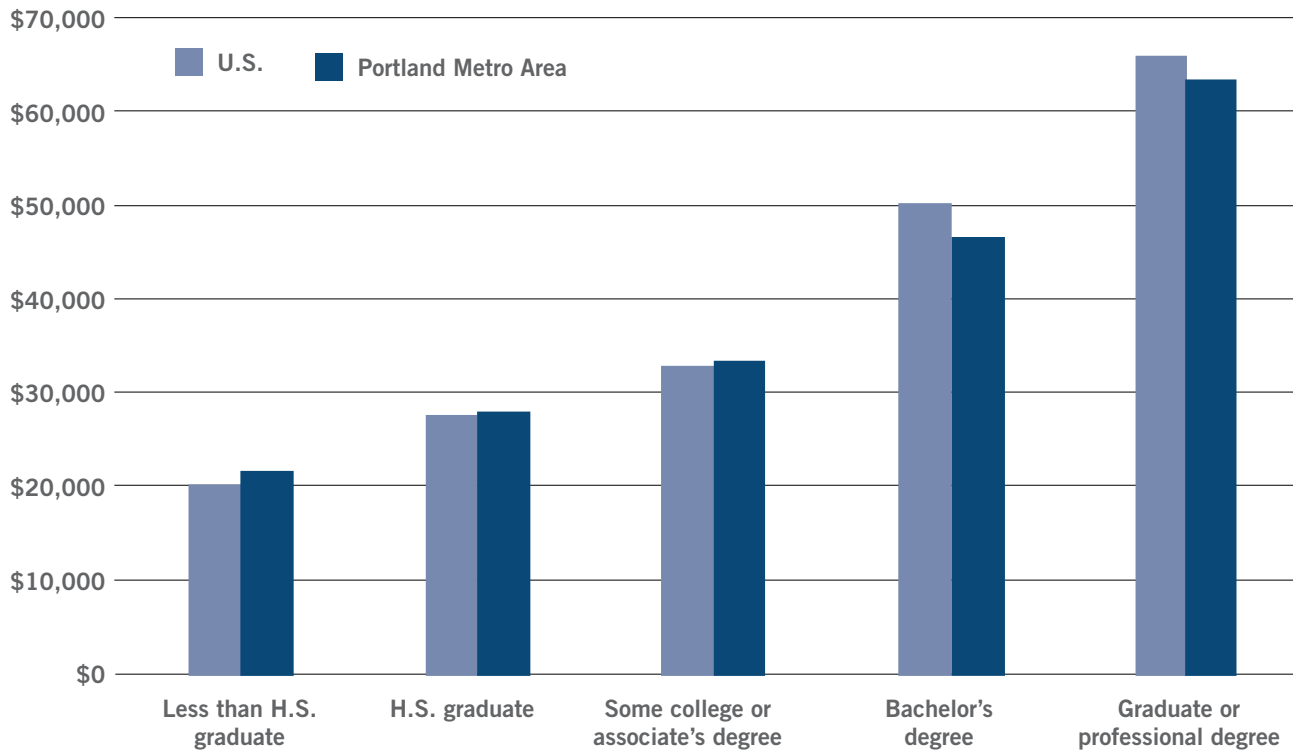
EDUCATIONAL ATTAINMENT: 2000 VS. 2014 GREATER PORTLAND REGION, POPULATION AGES 25+

Source: U.S. Census Bureau



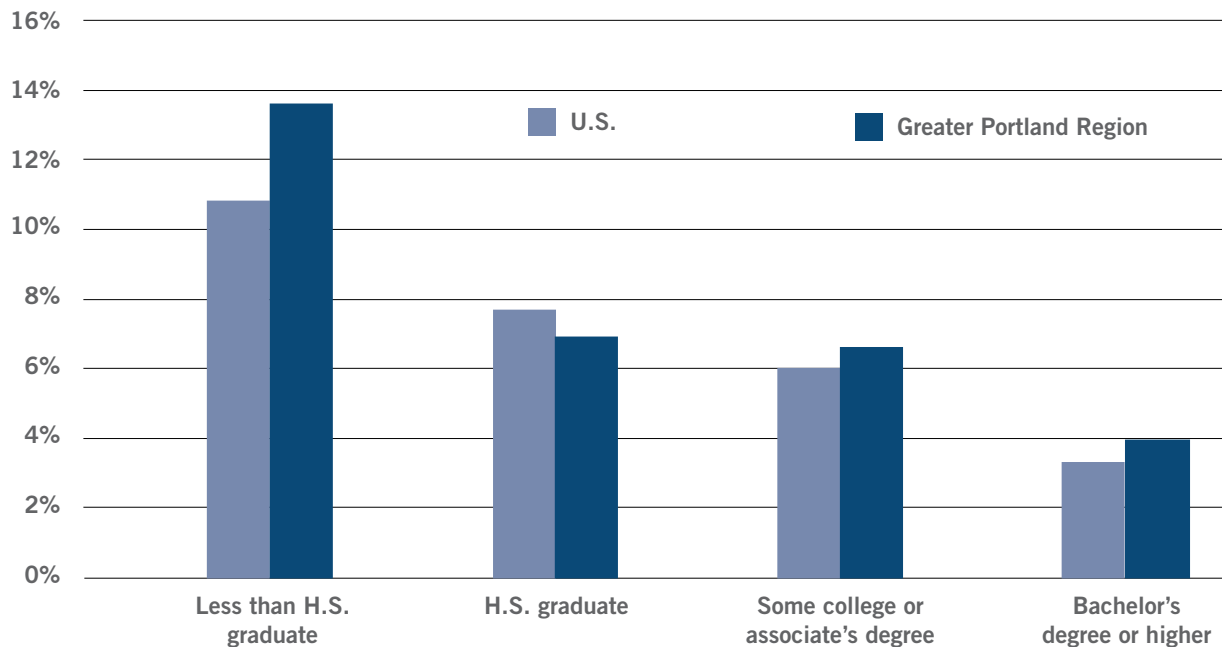
MEDIAN EARNINGS BY EDUCATIONAL ATTAINMENT: 2014

Source: U.S. Census



UNEMPLOYMENT RATE BY EDUCATIONAL ATTAINMENT: 2014

Source: U.S. Census



ATTAINED NATIONAL CAREER READINESS CERTIFICATES: JANUARY 2012 - NOVEMBER 2015

Source: ACT Work Ready Communities

	Bronze		Silver		Gold		Platinum		Total		% of Goal Attained
	#	%	#	%	#	%	#	%	#	%	
Clackamas	305	12%	1,459	55%	853	32%	28	1%	2,645	100%	89%
Columbia	40	8%	297	62%	142	29%	3	1%	482	100%	71%
Multnomah	790	14%	2,954	52%	1,857	33%	57	1%	5,658	100%	98%
Washington	448	11%	1,984	49%	1,558	38%	60	2%	4,050	100%	97%
Yamhill	126	14%	476	54%	272	31%	11	1%	885	100%	66%
Clark	47	13%	190	51%	132	35%	7	2%	376	100%	*
Cowlitz	13	3%	239	51%	207	45%	6	1%	465	100%	32%
Skamania	-	0%	7	88%	1	13%	-	0%	8	100%	*
Wahkiakum	-	0%	3	60%	2	40%	-	0%	5	100%	*
TOTAL	1,769	12%	7,609	52%	5,024	34%	172	1%	14,574	100%	

*Not yet fully participating

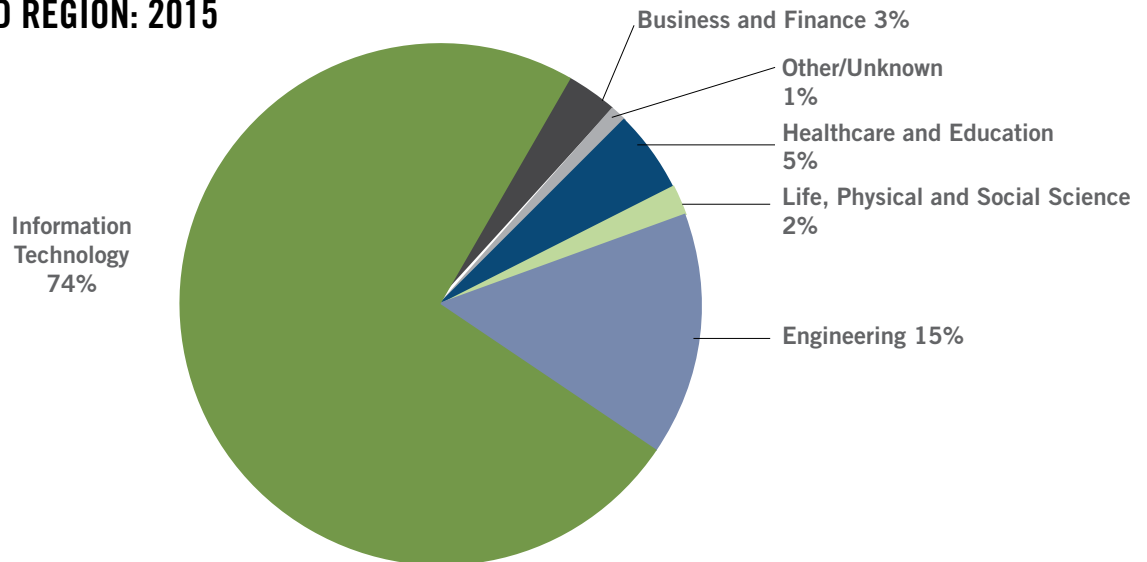
CERTIFIED H-1B VISAS BY OCCUPATIONAL GROUP, GREATER PORTLAND REGION: CALENDAR YEAR 2015

Source: myvisajobs.com

Occupation Group	Number	%
Information Technology	2,317	74.1%
Engineering	472	15.1%
Healthcare and Education	139	4.4%
Business and Finance	103	3.3%
Life, Physical, and Social Science	55	1.8%
Other/Unknown	39	1.2%

H-1B VISAS BY OCCUPATION GROUP GREATER PORTLAND REGION: 2015

Source: myvisajobs.com



SOCIO-ECONOMIC WELLBEING

POVERTY STATUS: INDIVIDUALS

Source: U.S. Census Bureau

	ALL AGES				UNDER 18			
	2000		2014		2000		2014	
	#	%	#	%	#	%	#	%
United States	31,581,086	11.3%	48,208,387	15.5%	11,587,118	16.2%	15,686,012	21.7%
Greater Portland Region	178,827	8.7%	335,960	13.9%	63,488	12.1%	95,809	18.0%
Clackamas	23,069	6.7%	37,450	9.5%	8,089	9.1%	10,896	21.3%
Columbia	3,756	8.5%	5,880	12.0%	1,337	11.5%	1,817	12.6%
Multnomah	69,392	10.5%	141,562	18.6%	23,244	15.5%	34,845	16.8%
Washington	30,295	6.6%	69,403	12.5%	11,265	9.1%	21,559	23.2%
Yamhill	7,511	9.2%	14,772	15.4%	2,895	12.7%	4,744	16.0%
Clark	31,736	8.9%	44,213	9.9%	11,978	12.0%	15,179	13.6%
Cowlitz	11,535	12.5%	20,701	20.6%	4,132	17.2%	6,118	26.8%
Skamania	1,132	11.4%	1,421	12.6%	418	16.6%	467	20.1%
Wahkiakum	401	10.8%	558	13.9%	130	15.8%	184	26.7%

HOUSEHOLDS ON PUBLIC ASSISTANCE

Source: U.S. Census Bureau

	2000				2014			
	Households on Public Assistance	Total # of Households	% of all Households on PA	Mean Public Assistance	Households on Public Assistance	Total # of Households	% of all Households on PA	Mean Cash Public Assistance
Clackamas	2,797	128,360	2.2%	\$2,948	3,836	149,910	2.6%	\$2,545
Columbia*	551	16,388	3.4%	\$2,205	676	18,772	3.6%	\$4,288
Multnomah	11,478	272,356	4.2%	\$2,624	13,849	313,812	4.4%	\$3,603
Washington	3,822	169,287	2.3%	\$2,947	7,826	209,426	3.7%	\$2,851
Yamhill	872	28,700	3.0%	\$2,416	2,135	34,072	6.3%	\$2,654
Clark	5,609	127,290	4.4%	\$3,298	6,254	165,133	3.8%	\$3,130
Cowlitz	1,980	35,883	5.5%	\$3,516	1,973	40,036	4.9%	\$2,358
Skamania*	164	3,761	4.4%	\$3,202	183	4,433	4.1%	\$4,675
Wahkiakum*	74	1,544	4.8%	\$2,582	51	1,716	3.0%	\$1,784
Greater Portland Region**	27,347	783,569	3.5%	\$2,893	36,727	934,837	3.9%	\$3,118
United States	3,629,732	105,539,122	3.4%	\$3,032	3,114,615	117,259,427	2.8%	\$3,150

*2014 data are 5-year estimates

**2014 data excludes Wahkiakum

HOUSEHOLDS WITH FOOD STAMPS/SNAP BENEFITS

(Supplemental Nutrition Assistance Program)

Source: U.S. Census Bureau

	2014		2007	
	Households	% of All Households	Households	% of All Households
Clackamas	20,185	13.5%	6,970	4.9%
Columbia* **	3,480	18.5%	1,705	9.4%
Multnomah	63,258	20.2%	31,854	10.9%
Washington	27,873	13.3%	13,518	7.0%
Yamhill	5,665	16.6%	4,263	12.8%
Clark	25,471	15.4%	10,709	7.1%
Cowlitz	9,611	24.0%	6,016	15.8%
Skamania**	727	16.4%	N/A	
Wahkiakum**	322	18.8%	N/A	
Greater Portland Region	155,442	14.8%	75,442	8.7%
United States	15,496,341	11.7%	8,676,234	7.7%

* 2007 data are 3-year estimates

** 2014 data are 5-year estimates

HOUSEHOLDS WITH FOOD STAMPS/SNAP BENEFITS

Source: U.S. Census Bureau

	October 2015			October 2014		2014-2015 Change		October 2013	
	SNAP Persons	SNAP Persons per Thousand	Average Benefit per Person	SNAP Persons	SNAP Persons per Thousand	SNAP Persons- #	SNAP Persons-%	SNAP Persons	SNAP Persons per Thousand
Portland Metro (Oregon portion)	290,360	155.2	\$127	306,646	166.2	-16,286	-5.3%	315,507	173.1
Clackamas	47,699	121.8	\$125	50,849	131.7	-3,150	-6.2%	51,588	135.2
Columbia	9,056	180.8	\$125	9,580	192.2	-524	-5.5%	9,752	196.3
Multnomah	150,587	196.6	\$132	158,846	210.0	-8,259	-5.2%	163,726	218.8
Washington	64,115	114.4	\$122	67,401	122.3	-3,286	-4.9%	69,586	128.2
Yamhill	18,903	184.4	\$119	19,970	196.9	-1,067	-5.3%	20,855	207.4

	October 2012		Oct. 2011	Oct. 2010	Oct. 2009	Oct. 2008	Oct. 2007	Oct. 2006
	SNAP Persons	SNAP Persons per Thousand	SNAP Persons	SNAP Persons	SNAP Persons	SNAP Persons	SNAP Persons	SNAP Persons
Portland Metro (Oregon portion)	319,788	177.0	310,988	287,966	254,475	186,891	166,302	163,997
Clackamas	52,816	139.5	51,531	47,275	40,982	29,121	24,766	22,710
Columbia	9,913	199.8	9,538	8,965	8,191	5,987	5,163	5,454
Multnomah	164,940	222.3	159,363	147,745	131,937	99,876	91,748	90,976
Washington	71,016	132.4	70,026	64,880	56,423	38,947	33,504	34,080
Yamhill	21,103	211.3	20,530	19,101	16,942	12,960	11,121	10,777

WORKING POOR (PEOPLE WORKING FULL TIME, YEAR ROUND AND EARNING LESS THAN \$25,000): 2014

Source: U.S. Census Bureau

	Clackamas	Columbia*	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania*	Wahkiakum*	Greater Portland Region	U.S.
Full-time, year-round workers with earnings	133,830	13,441	252,633	188,492	29,428	139,410	25,431	3,122	705	785,835	103,777,612
Earned under \$25,000 (Working Poor)	22,082	2,137	44,716	26,389	7,180	20,633	5,925	450	80	131,392	21,066,855
Percent of full-time, year-round workers earning less than \$25,000	16.5%	15.9%	17.7%	14.0%	24.4%	14.8%	23.3%	14.4%	11.4%	16.7%	20.3%

*5-year estimates

PEOPLE IN SUBSIDIZED HOUSING

Source: U.S. Department of Housing and Urban Development

	2000				2014			
	People Per Unit	People in Subsidized Housing	Total Population	% in Subsidized Housing	People Per Unit	People in Subsidized Housing	Total Population	% in Subsidized Housing
Clackamas	2.4	4,400	338,391	1.3%	2.1	5,515	394,972	1.4%
Columbia	2.3	400	43,560	0.9%	2	1,055	49,325	2.1%
Multnomah	2.3	22,400	660,486	3.4%	1.9	29,091	776,712	3.7%
Washington	2.6	5,500	445,342	1.2%	2.2	8,564	562,998	1.5%
Yamhill	2.7	3,300	84,992	3.9%	2.4	3,411	101,758	3.4%
Clark	1.9	2,800	345,238	0.8%	2	7,701	451,008	1.7%
Cowlitz					1.9	2,978	102,133	2.9%
Skamania	2.1	100	9,872	1.0%	2	235	11,194	2.1%
Wahkiakum					1.5	64	4,016	1.6%
Total		38,900	1,927,881	2.0%		58,614	2,454,116	2.4%

COMMUTING PATTERNS

NET COMMUTING: 2013

Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics

	Total Resident Workers	Out Commuting	% Out Commuting	Total County Jobs	In Commuting	% In Commuting	Net Gain
Clackamas	175,415	116,305	66%	146,121	87,011	60%	(29,294)
Columbia	20,905	15,445	74%	9,502	4,042	43%	(11,403)
Multnomah	339,411	115,742	34%	461,868	238,199	52%	122,457
Washington	244,458	116,288	48%	256,235	128,065	50%	11,777
Yamhill	40,643	23,158	57%	31,693	14,208	45%	(8,950)
Clark	187,780	95,014	51%	131,636	38,870	30%	(56,144)
Cowlitz	44,275	23,079	52%	33,619	12,423	37%	(10,656)
Skamania	5,482	4,418	81%	2,432	1,368	56%	(3,050)
Wahkiakum	1,400	1,027	73%	697	324	46%	(703)

MEANS OF TRANSPORTATION TO WORK: 2014

Source: U.S. Census

	United States	Greater Portland Region	Clackamas	Columbia *	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania*	Wahkiakum*
Workers 16+	1,779,891	1,163,411	186,758	19,787	393,195	274,192	42,965	204,906	37,553	4,522	1,259
Drove alone	1,254,586	815,667	141,484	15,811	234,168	200,685	32,395	159,749	28,113	3,487	913
Carpooled	191,874	120,018	17,548	2,305	38,434	29,204	6,271	20,226	5,700	432	151
Public trans.	82,817	73,782	6,191	182	43,674	18,287	417	5,037	111	5	53
Walked	70,615	37,629	4,186	424	19,620	6,405	1,333	4,082	856	93	52
Other means	66,931	42,550	3,542	179	28,294	5,459	556	3,396	1,120	128	1
Worked at home	113,068	73,765	13,807	886	29,005	14,152	1,993	12,416	1,653	377	89
Mean travel time to work (minutes)	23.1	25.9	28.1	32.2	25.9	24.7	27.2	25.3	23.3	29.0	29.0

	United States	Greater Portland Region	Clackamas	Columbia *	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania*	Wahkiakum*
Workers 16+	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Drove alone	70.5%	70.1%	75.8%	79.9%	59.6%	73.2%	75.4%	78.0%	74.9%	77.1%	72.5%
Carpooled	10.8%	10.3%	9.4%	11.6%	9.8%	10.7%	14.6%	9.9%	15.2%	9.6%	12.0%
Public trans.	4.7%	6.3%	3.3%	0.9%	11.1%	6.7%	1.0%	2.5%	0.3%	0.1%	4.2%
Walked	4.0%	3.2%	2.2%	2.1%	5.0%	2.3%	3.1%	2.0%	2.3%	2.1%	4.1%
Other means	3.8%	3.7%	1.9%	0.9%	7.2%	2.0%	1.3%	1.7%	3.0%	2.8%	0.1%
Worked at home	6.4%	6.3%	7.4%	4.5%	7.4%	5.2%	4.6%	6.1%	4.4%	8.3%	7.1%

* 2014 5-year estimates
Greater Portland excludes Wahkiakum

COUNTY BY COUNTY COMMUTING PATTERNS (TOP 5 FOR EACH): 2013

Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics

Clackamas County Residents going to:	Count
Multnomah County	64,444
Clackamas County	59,110
Washington County	28,053
Marion County	7,152
Clark County	2,488

Columbia County Residents Going to:	Count
Multnomah County	6,187
Columbia County	5,460
Washington County	3,565
Clackamas County	1,237
Cowlitz County	1,045

Multnomah County Residents Going to:	Count
Multnomah County	223,669
Washington County	46,564
Clackamas County	34,577
Clark County	9,327
Marion County	6,000

Washington County Residents Going to:	Count
Washington County	128,170
Multnomah County	71,471
Clackamas County	20,685
Marion County	5,783
Yamhill County	3,304

Yamhill County Residents Going to:	Count
Yamhill County	17,485
Washington County	7,773
Marion County	3,574
Multnomah County	3,434
Clackamas County	2,333

Clark County Residents Going to:	Count
Clark County	92,766
Multnomah County	45,182
King County	11,964
Washington County	9,391
Clackamas County	6,002

Cowlitz County Residents Going to:	Count
Cowlitz County	21,196
Clark County	4,774
King County	3,644
Multnomah County	2,438
Peirce County	1,820

Skamania County Residents Going to:	Count
Skamania County	1,064
Clark County	1,047
Multnomah County	724
Klickitat County	423
King County	328

Wahkiakum County Residents Going to:	Count
Wahkiakum County	373
Cowlitz County	202
Clark County	147
King County	95
Pacific County	94

LARGEST EMPLOYERS IN THE GREATER PORTLAND REGION (RANKED BY NUMBER OF CURRENT LOCAL EMPLOYEES): 2014/2015

Source: Portland Business Journal, Vancouver Business Journal, Clackamas County, The Oregonian

Workforce Region	Company	Number of Local Employees	Industry
Portland Metro (Multnomah and Washington Counties)			
	Intel Corp	18,600	Manufacturing
	Providence Health & Services	16,139	Health Care
	Oregon Health and Science University	14,963	Health Care and Education
	Kaiser Permanente Northwest	11,898	Health Care
	Fred Meyer Stores*	10,813	Retail
	Legacy Health System*	8,700	Health Care
	Nike Inc.	8,500	Athletic footwear and apparel
	Portland Public Schools	6,135	Education
	Multnomah County	5,995	Local Government
	City of Portland	5,481	Local Government
Southwest Washington (Clark, Cowlitz, Skamania, Wahkiakum Counties)			
	PeaceHealth	4,374	Health Care
	Bonneville Power Administration	2,946	Utilities
	Evergreen Public Schools	2,764	Education
	Vancouver Public Schools	2,400	Education
	Fred Meyer Stores	1,743	Retail
	Clark County	1,550	Local Government
	Battle Ground Public Schools	1,385	Education
	Legacy Salmon Creek Medical Center	1,160	Health Care
	The Vancouver Clinic	1,061	Health Care
	WaferTech	1,050	Manufacturing
Clackamas County			
	Clackamas County	2,200	Local Government
	PCC Structurals	1,000-2,000	Manufacturing
	Xerox	1,500	Manufacturing
	Providence Health and Services	1,100	Health Care
	Mentor Graphics	1,000	Manufacturing
	Blount International	900	Manufacturing
	Clackamas Community College	800	Education
	Lake Oswego School District	800	Education
	Rockwell Collins	400	Manufacturing
	Sysco Food Services	500	Wholesale Trade

* Employment includes SW Washington

**Full-time employees

NONFARM PAYROLL EMPLOYMENT: 2005 AND 2015*

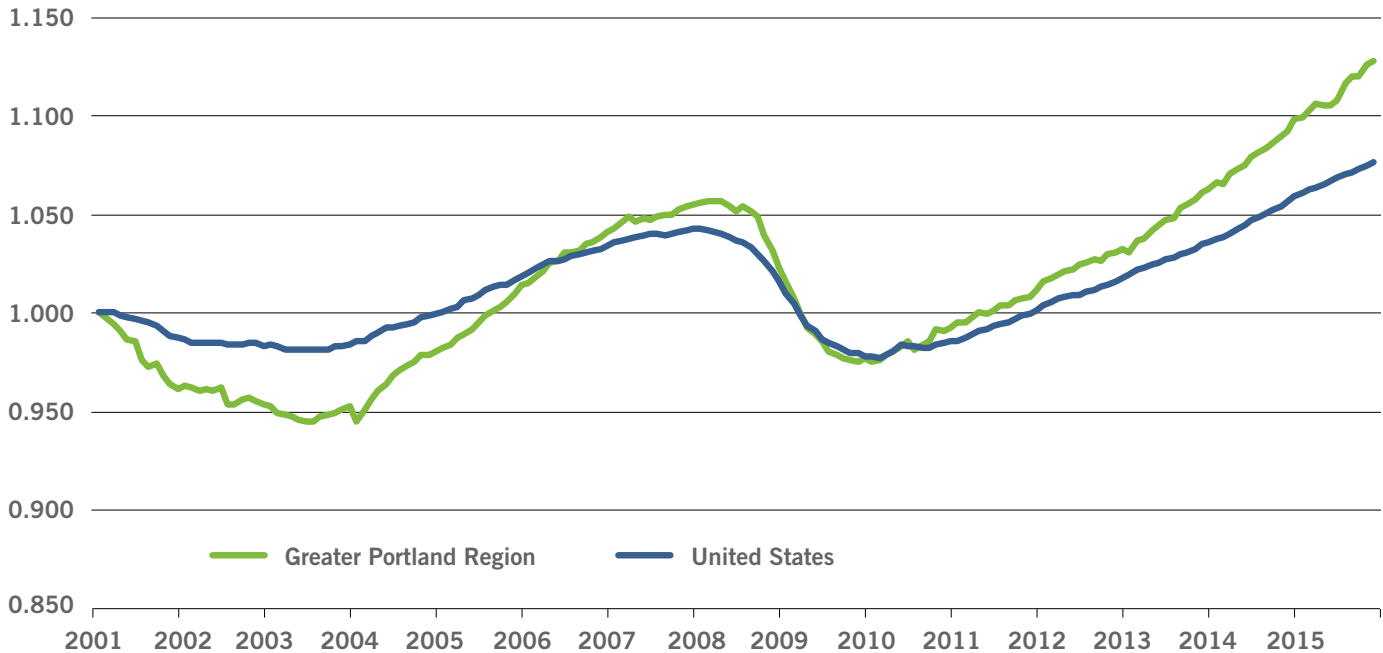
Source: Oregon Employment Department, Washington State Department of Employment Security

	Clackamas	Columbia	Multnomah	Washington	Yamhill	Clark	Cowlitz	Skamania	Wahkiakum	Greater Portland Region
2005	140,900	10,300	436,000	235,400	29,800	130,700	38,800	2,280	740	1,024,920
2015*	148,400	10,400	484,600	273,900	33,000	149,600	37,300	2,280	850	1,140,330
2005-2015 Change (#)	7,500	100	48,600	38,500	3,200	18,900	-1,500	0	110	115,410
2005-2015 Change (%)	5.3%	1.0%	11.1%	16.4%	10.7%	14.5%	-3.9%	0.0%	14.9%	11.3%
2005 Share of Employment	13.7%	1.0%	42.5%	23.0%	2.9%	12.8%	3.8%	0.2%	0.1%	
2015 Share of Employment	13.0%	0.9%	42.5%	24.0%	2.9%	13.1%	3.3%	0.2%	0.1%	

*year-to-date through November

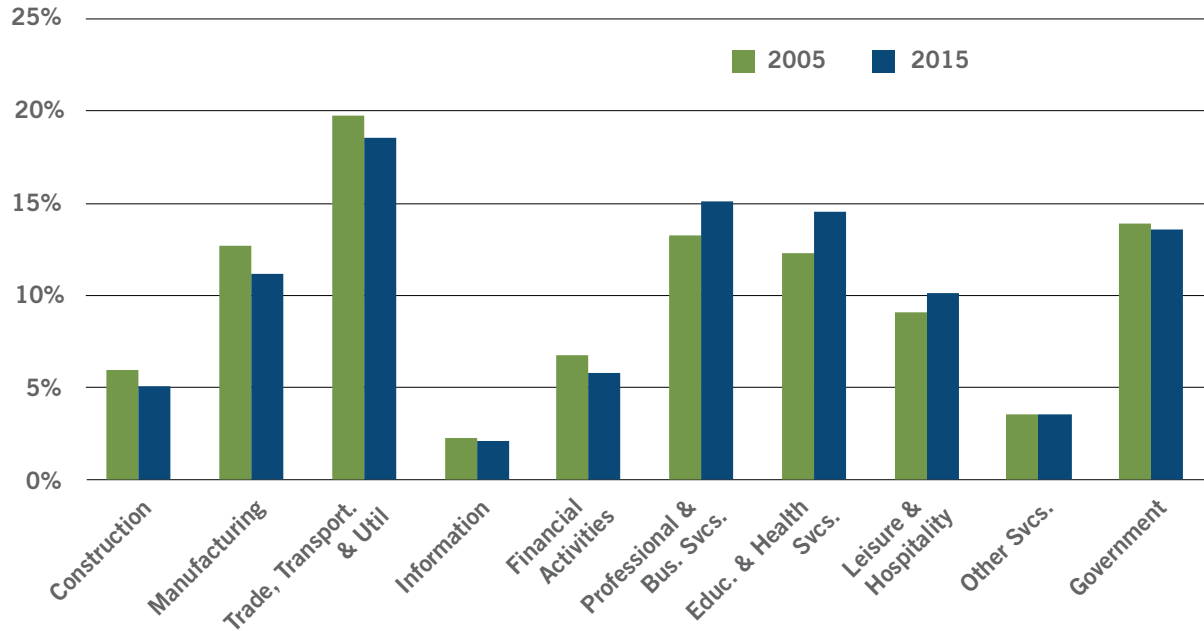
NONFARM EMPLOYMENT, PORTLAND REGION AND U.S.: 2001-2015 (2001 INDEXED TO 1)

Source: Oregon Employment Department, Washington State Department of Employment Security



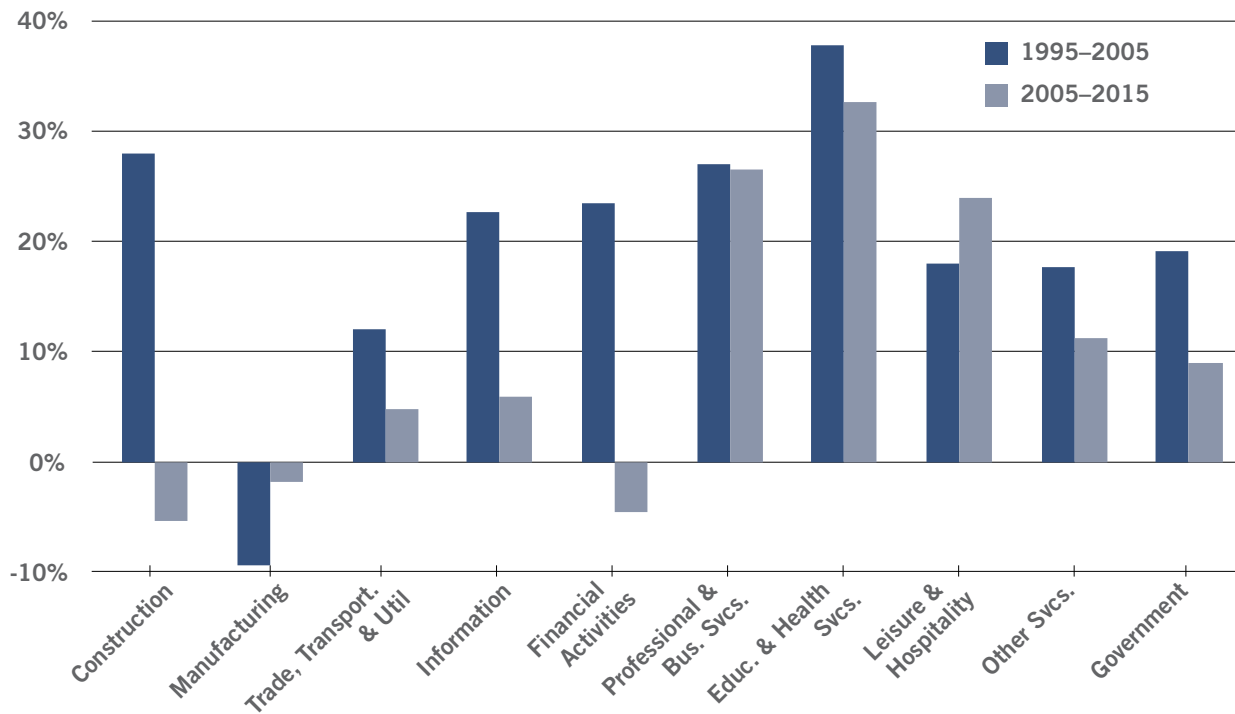
DISTRIBUTION OF EMPLOYMENT BY BROAD INDUSTRY GREATER PORTLAND REGION: 2005 VS. 2015

Source: Oregon Employment Department, Washington State Department of Employment Security



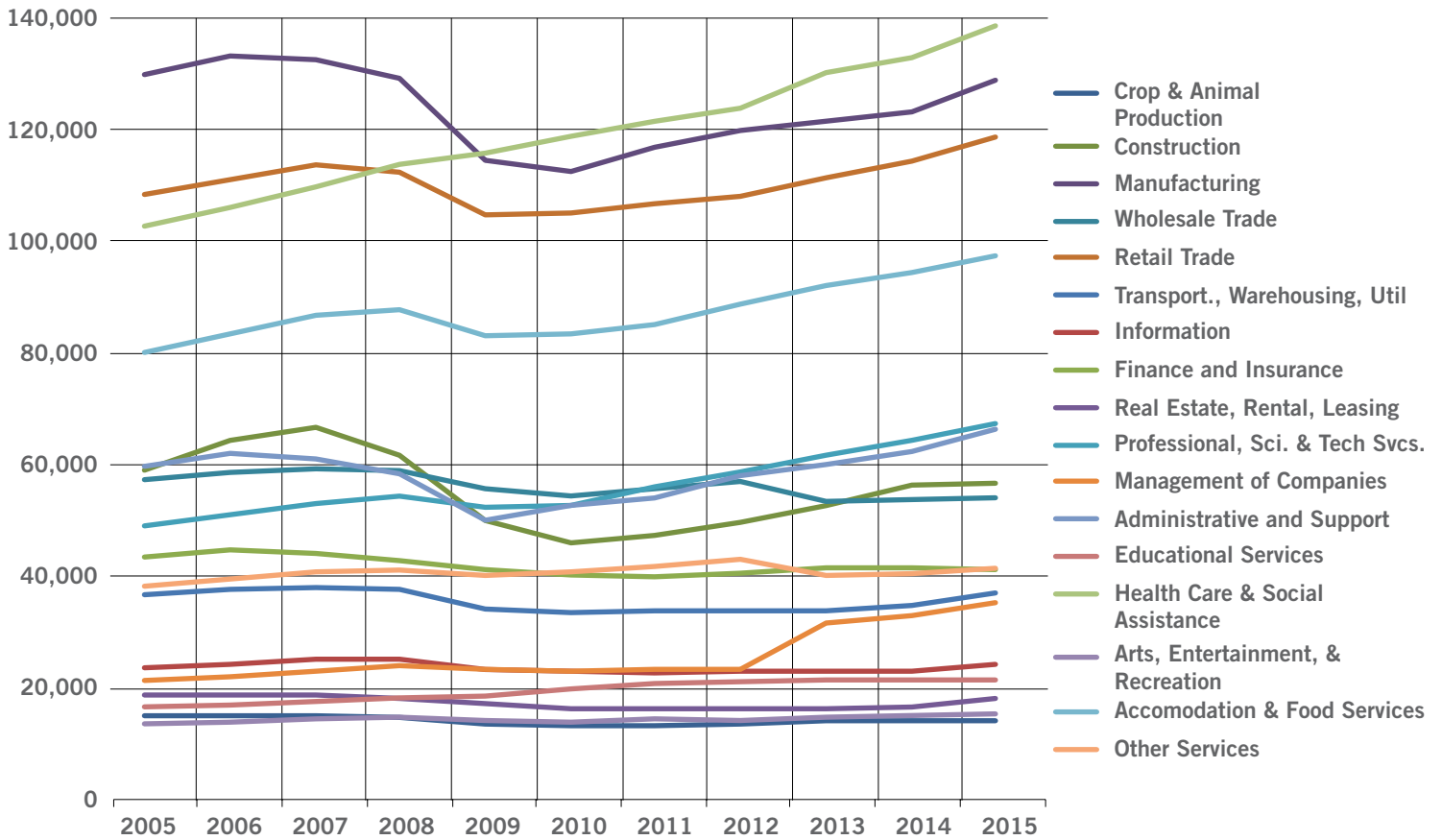
EMPLOYMENT GROWTH BY BROAD INDUSTRY GREATER PORTLAND REGION: 1995-2015

Source: Oregon Employment Department, WA State Office of Employment Security



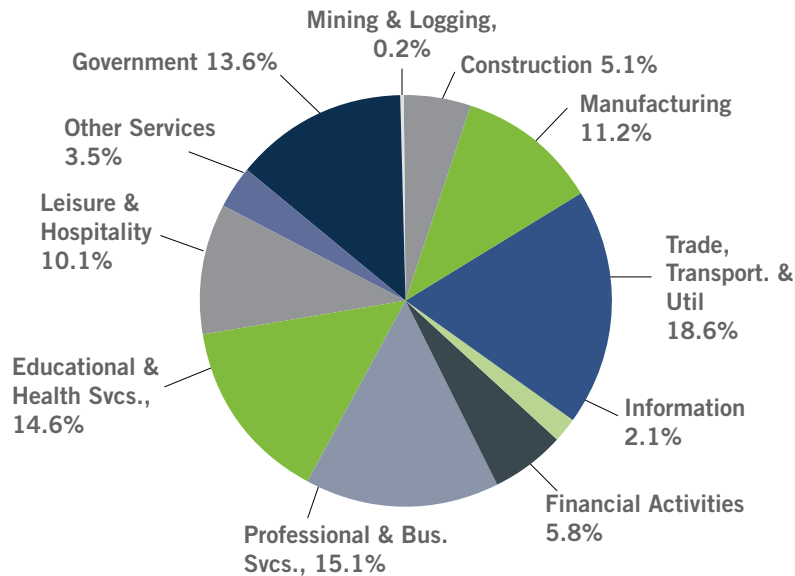
EMPLOYMENT BY INDUSTRY, GREATER PORTLAND REGION 2005-2015 (PRIVATE SECTOR)

Source: EMSI



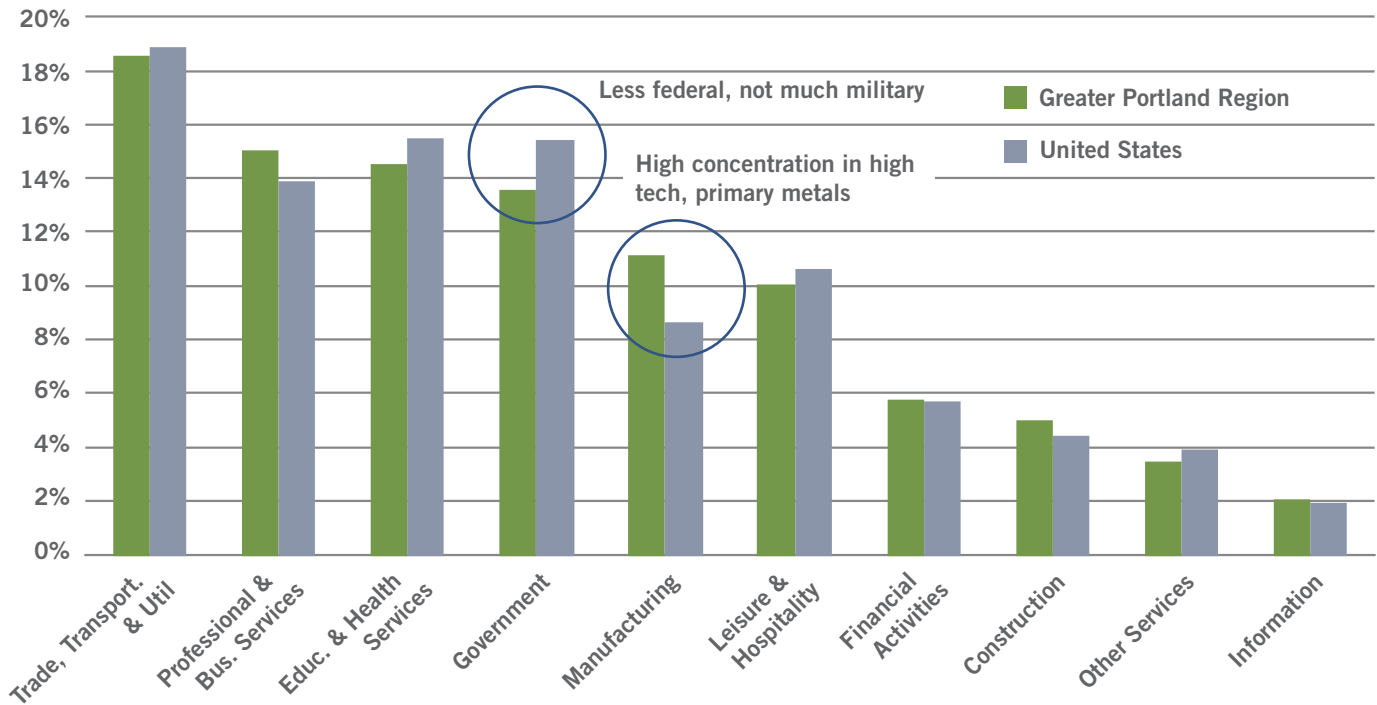
EMPLOYMENT BY BROAD INDUSTRY, GREATER PORTLAND REGION: 2015

Source: Oregon Employment Department, Washington State Office of Employment Security



SHARE OF EMPLOYMENT BY INDUSTRY GREATER PORTLAND COMPARED TO U.S.: 2015

Source: OR Employment Dept., WA State Office of Employment Security, Bureau of Labor Statistics



GREATER PORTLAND REGION'S COVERED EMPLOYMENT, PAYROLL, AND AVERAGE PAY: 2014

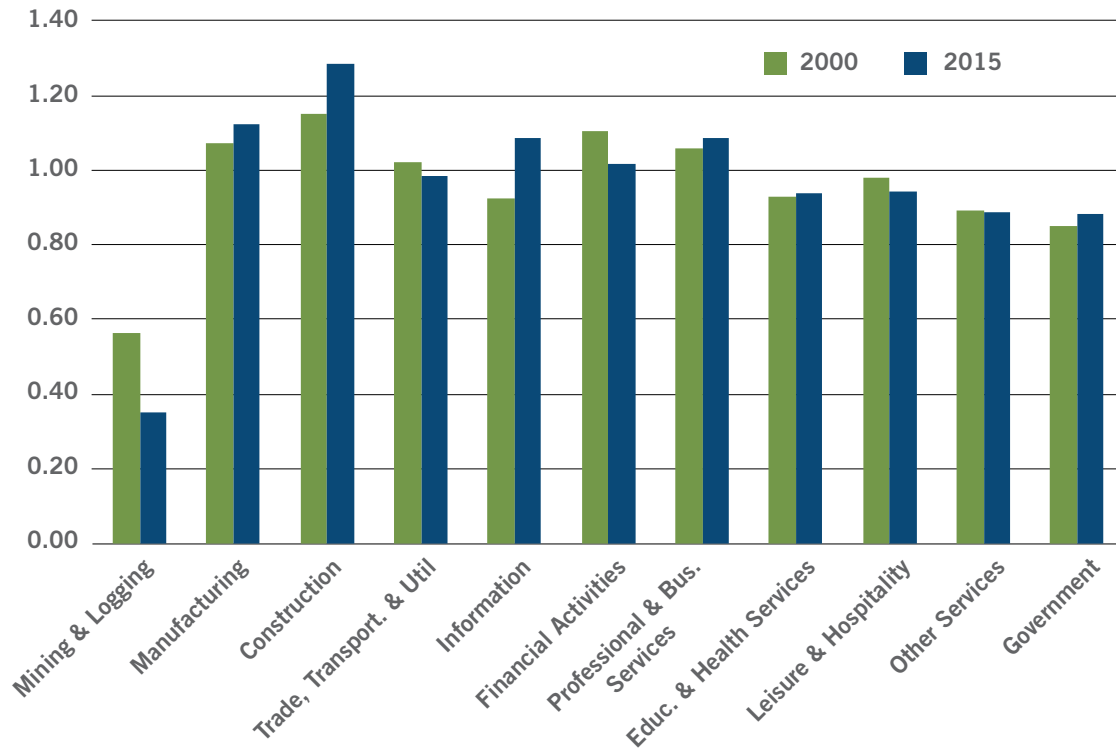
Source: Oregon Employment Department, Washington State Office of Employment Security, Bureau of Labor Statistics

	Employment	Payroll (000s)	Establishments	Average Annual Wage
Total Covered Employment	1,097,777	57,220,388	82,281	\$52,124
Private	952,150	\$49,384,972	80,528	\$51,867
Natural Resources and Mining	14,769	\$481,868	1,013	\$32,627
Construction	56,531	\$3,295,605	6,974	\$58,297
Manufacturing	124,052	\$9,177,772	3,492	\$73,983
Trade, transportation, and utilities	204,580	\$8,771,244	15,339	\$42,874
Information	23,244	\$1,752,802	1,599	\$75,409
Financial activities	58,262	\$3,871,085	7,189	\$66,443
Professional and business services	162,397	\$11,139,418	14,772	\$68,594
Educational and health services	155,693	\$7,275,834	13,067	\$46,732
Leisure and hospitality	111,039	\$2,229,383	6,989	\$20,077
Other services	41,584	\$1,389,962	10,093	\$33,425
Government	145,627	7,835,416	1,753	\$53,805
Federal	17,971	\$1,373,836	292	\$76,447
State	22,262	\$928,143	266	\$41,692
Local	105,394	\$5,533,437	1,195	\$52,502

* 'Covered Employment': Employment and wages covered under Unemployment Insurance programs

LOCATION QUOTIENTS, GREATER PORTLAND REGION: 2000 AND 2015

Source: Oregon Employment Dept., Washington State Office of Employment Security, Bureau of Labor Statistics



FORECASTED EMPLOYMENT GROWTH, GREATER PORTLAND REGION

Source: EMSI

	Employment		Change	
	2014	2024	#	%
Total employment	1,094,050	1,288,490	194,440	17.8%
Total private	948,160	1,127,240	179,080	18.9%
Natural resources and mining	14,870	16,510	1,640	11.0%
Construction	56,510	71,380	14,870	26.3%
Manufacturing	124,150	141,320	17,170	13.8%
Durable goods	90,670	105,540	14,870	16.4%
Nondurable goods	33,480	35,780	2,300	6.9%
Trade, transportation, and utilities	204,570	230,140	25,570	12.5%
Wholesale trade	53,690	60,380	6,690	12.5%
Retail trade	115,600	130,560	14,960	12.9%
Transportation, warehousing, and utilities	35,280	39,200	3,920	11.1%
Information	23,260	26,830	3,570	15.3%
Financial activities	58,240	65,080	6,840	11.7%
Professional and business services	162,360	208,200	45,840	28.2%
Professional and technical services	65,540	84,500	18,960	28.9%
Management of companies and enterprises	33,570	42,380	8,810	26.2%
Administrative and waste services	63,250	81,320	18,070	28.6%
Educational and health services (private)	155,730	194,450	38,720	24.9%
Educational services	21,690	25,890	4,200	19.4%
Health care and social assistance	134,040	168,560	34,520	25.8%
Leisure and hospitality	111,030	131,040	20,010	18.0%
Arts, entertainment, and recreation	15,460	17,590	2,130	13.8%
Accommodation and food services	95,570	113,450	17,880	18.7%
Other services	37,440	42,290	4,850	13.0%
Government	145,890	161,250	15,360	10.5%
Federal government	17,980	17,310	(670)	-3.7%
State government	22,280	24,270	1,990	8.9%
Local government	105,630	119,670	14,040	13.3%

JOBS, PROJECTED OPENINGS, AND GRADUATE DATA BY TARGETED INDUSTRY

Source: EMSI

Description	2014 Jobs	2024 Jobs	Projected Annual Growth Openings*	Median Annual Earnings	Regional Completions (2013)	Median Hourly Earnings
Advanced Manufacturing						
Electrical and Electronic Equipment Assemblers	2,871	3,467	60	\$34,078	na	55.635
Industrial Engineers	3,311	3,879	57	\$102,868	75	51.555
Welders, Cutters, Solderers, and Brazers	3,519	4,122	60	\$40,910	122	49.290
Machinists	2,819	3,681	86	\$46,702	109	38.787
Electrical and Electronics Engineering Technicians	2,616	2,963	35	\$61,775	186	29.600
Computer-Controlled Machine Tool Operators	1,715	2,257	54	\$37,908	50	14.988
Computer Hardware Engineers	2,011	2,285	27	\$116,109	11	16.328
Mechanical Engineers	2,542	2,999	46	\$80,948	137	18.164
Shipping, Receiving, and Traffic Clerks	5,356	5,994	64	\$31,280	na	22.378
Electronics Engineers, Except Computer	1,644	1,941	30	\$107,595	169	19.602
Health Care						
Registered Nurses	19,239	22,417	318	\$86,205	1448	38.099
Medical Secretaries	7,381	9,204	182	\$36,604	222	41.306
Nursing Assistants	7,142	8,980	184	\$28,312	374	35.999
Medical Assistants	5,889	7,219	133	\$35,654	1598	24.084
Dental Assistants	3,168	3,664	50	\$41,617	294	20.445
Dental Hygienists	2,690	3,212	52	\$75,130	152	11.458
Home Health Aides	2,870	4,328	146	\$23,913	na	13.566
Licensed Practical and Licensed Vocational Nurses	1,852	2,555	70	\$50,263	407	19.941
Medical Records and Health Information Technicians	2,023	2,343	32	\$42,669	210	17.084
Physical Therapists	1,472	1,850	38	\$79,513	43	17.539
Software/IT						
Software Developers, Applications	6,213	7,970	176	\$92,040	522	53.617
Software Developers, Systems Software	4,458	5,383	93	\$103,293	397	40.611
Computer User Support Specialists	5,692	7,012	132	\$47,318	na	34.715
Computer Systems Analysts	4,114	5,393	128	\$84,754	166	44.102
Computer Programmers	2,289	2,723	43	\$72,449	549	49.493
Computer and Information Systems Managers	3,435	4,153	72	\$111,898	366	31.661
Web Developers	2,341	2,767	43	\$66,077	225	33.909
Sales Representatives, Technical & Scientific Products	3,444	4,047	60	\$67,999	7	22.673
Network and Computer Systems Administrators	2,540	3,092	55	\$70,768	68	28.501
Computer Network Support Specialists	1,174	1,347	17	\$59,481	350	32.582

*Doesn't include replacement openings (e.g. vacancies due to retirements)

TOP OCCUPATIONS IN THE GREATER PORTLAND REGION BASED ON 2014 EMPLOYMENT

Source: Bureau of Labor Statistics, Occupational Employment Statistics

Occupation	#	%	Median Wage	Entry*	Average	Experienced**	Average Annual	Location Quotient
Retail Salespersons	36,920	3.4%	23,620	\$9.32	\$13.05	\$14.36	\$27,133	1.00
Cashiers	22,570	2.1%	22,640	\$9.22	\$11.88	\$13.46	\$24,697	0.81
Food Prep. & Serving, incl. fast food	21,160	1.9%	19,680	\$9.16	\$10.44	\$11.13	\$21,724	0.83
Customer Service Representatives	19,540	1.8%	34,630	\$10.97	\$17.39	\$20.47	\$36,166	0.98
Registered Nurses	19,330	1.8%	86,390	\$28.62	\$40.92	\$47.13	\$85,115	0.89
Office Clerks, General	18,530	1.7%	32,900	\$10.25	\$16.28	\$18.86	\$33,847	0.79
General and Operations Managers	17,870	1.6%	90,410	\$20.53	\$51.80	\$65.03	\$107,740	1.09
Waiters and Waitresses	17,680	1.6%	19,430	\$9.14	\$11.46	\$10.83	\$23,835	0.91
Laborers and Freight, Stock, and Material Movers, Hand	16,600	1.5%	26,090	\$9.42	\$14.05	\$15.76	\$29,234	0.84
Secretaries & Admin. Assistants, excl. Legal, Medical, Exec.	15,350	1.4%	35,900	\$11.42	\$17.57	\$21.04	\$36,553	0.86
Janitors and Cleaners, excl. Maids & Housekeeping	14,920	1.4%	25,360	\$9.26	\$12.95	\$14.61	\$26,931	0.86
Bookkeeping, Accounting, and Auditing Clerks	14,410	1.3%	38,510	\$12.95	\$19.18	\$22.31	\$39,895	1.13
Cooks, Restaurant	14,290	1.3%	22,930	\$9.25	\$11.61	\$12.99	\$24,165	1.63
Sales Reps, Wholesale & Mfg., excl. Tech. & Sci. Products	13,030	1.2%	58,090	\$15.94	\$32.50	\$39.98	\$67,595	1.16
Stock Clerks and Order Fillers	12,930	1.2%	28,270	\$9.66	\$14.39	\$16.97	\$29,930	0.85
Heavy and Tractor-Trailer Truck Drivers	11,860	1.1%	39,440	\$15.20	\$19.88	\$22.30	\$41,340	0.88
Teacher Assistants	9,860	0.9%	30,100				\$30,054	1.00
Business Operations Specialists, All Other	9,660	0.9%	62,300	\$16.19	\$32.04	\$39.38	\$66,639	1.31
Supervisors of Office and Administrative Support Workers	9,180	0.8%	50,740	\$16.13	\$25.65	\$30.34	\$53,352	0.81
Substitute Teachers	8,930	0.8%	43,620	\$17.97	\$20.55	\$22.37	\$42,752	1.80
Accountants and Auditors	8,380	0.8%	62,510	\$20.10	\$32.60	\$38.53	\$67,828	0.88
Personal Care Aides	8,380	0.8%	22,740	\$9.40	\$11.87	\$12.23	\$24,679	0.81
Supervisors of Retail Sales Workers	8,260	0.8%	37,220	\$12.21	\$19.22	\$22.34	\$39,980	0.84
Maintenance and Repair Workers, General	7,970	0.7%	40,330	\$11.83	\$20.21	\$25.39	\$42,025	0.75
Elementary School Teachers, Except Special Education	7,890	0.7%	60,280				\$59,361	0.71
Food Preparation Workers	7,740	0.7%	21,590	\$9.22	\$10.98	\$11.80	\$22,844	1.14
Medical Secretaries	7,540	0.7%	36,200	\$12.91	\$17.94	\$20.79	\$37,316	1.84
Carpenters	6,990	0.6%	41,090	\$11.32	\$21.07	\$26.76	\$43,817	1.41
Nursing Assistants	6,950	0.6%	27,970	\$10.11	\$13.83	\$16.06	\$28,756	0.58
Construction Laborers	6,800	0.6%	36,030	\$11.31	\$18.76	\$23.71	\$39,027	0.94

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TOP OCCUPATIONS IN THE GREATER PORTLAND REGION BASED ON 2014 EMPLOYMENT (CONTINUED)

Occupation	#	%	Median Wage	Entry*	Average	Experienced**	Average Annual	Location Quotient
Software Developers, Applications	6,580	0.6%	91,420	\$25.67	\$43.75	\$52.62	\$90,997	1.22
Receptionists and Information Clerks	6,540	0.6%	28,050	\$9.95	\$14.07	\$16.10	\$29,254	0.82
Supervisors of Food Preparation and Serving Workers	6,460	0.6%	27,750	\$10.08	\$14.93	\$17.73	\$31,050	0.92
Bartenders	6,430	0.6%	19,500	\$9.15	\$10.43	\$10.60	\$21,705	1.38
Medical Assistants	5,970	0.5%	35,170	\$12.69	\$16.94	\$19.08	\$35,232	1.26
Sales Representatives, Services, All Other	5,940	0.5%	51,960	\$12.81	\$30.05	\$36.91	\$62,499	0.91
Computer User Support Specialists	5,890	0.5%	46,920	\$15.07	\$23.83	\$28.65	\$49,582	1.32
Electricians	5,890	0.5%	75,890	\$21.45	\$34.80	\$42.34	\$72,388	1.27
Landscaping and Groundskeeping Workers	5,880	0.5%	27,350	\$9.75	\$14.37	\$16.50	\$29,872	0.84
Security Guards	5,650	0.5%	29,510	\$9.40	\$15.16	\$18.57	\$31,535	0.66
Light Truck or Delivery Services Drivers	5,460	0.5%	30,320	\$9.87	\$17.04	\$20.14	\$35,437	0.85
Shipping, Receiving, and Traffic Clerks	5,420	0.5%	30,990	\$10.31	\$15.87	\$18.04	\$33,026	0.99
Maids and Housekeeping Cleaners	5,270	0.5%	22,760	\$9.26	\$11.95	\$14.07	\$24,854	0.69
Industrial Truck and Tractor Operators	5,260	0.5%	35,740	\$11.09	\$17.94	\$21.23	\$37,308	1.20
Secondary School Teachers, excl. Special & Career/Tech.	5,250	0.5%	60,960				\$59,509	0.68
Production Workers, All Other	5,160	0.5%	28,020	\$9.43	\$15.37	\$19.11	\$31,970	3.04
Managers, All Other	4,890	0.4%	90,380	\$25.14	\$45.79	\$55.99	\$95,248	1.71
Financial Managers	4,840	0.4%	99,630	\$27.78	\$52.78	\$62.82	\$109,787	1.17
Software Developers, Systems Software	4,690	0.4%	101,770	\$32.77	\$49.08	\$58.05	\$102,090	1.57
Lawyers	4,580	0.4%	110,400	\$30.35	\$58.78	\$68.84	\$122,248	0.96
ALL OCCUPATIONS	1,090,310							1.00

*10th percentile

**75th percentile

TOP OCCUPATIONS IN THE GREATER PORTLAND REGION BASED ON EMPLOYMENT TIMES WAGES: 2014

Source: Bureau of Labor Statistics, Occupational Employment Statistics

Occupation	Employment	Entry*	Average	Experienced**	Average Annual
General and Operations Managers	17,870	\$20.53	\$51.80	\$65.03	\$107,740
Registered Nurses	19,330	\$28.62	\$40.92	\$47.13	\$85,115
Retail Salespersons	36,920	\$9.32	\$13.05	\$14.36	\$27,133
Sales Reps, Wholesale & Mfg., excl. Tech. & Sci. Products	13,030	\$15.94	\$32.50	\$39.98	\$67,595
Physicians and Surgeons, All Other	3,890	\$26.60	\$92.55	#	\$192,489
Customer Service Representatives	19,540	\$10.97	\$17.39	\$20.47	\$36,166
Business Operations Specialists, All Other	9,660	\$16.19	\$32.04	\$39.38	\$66,639
Office Clerks, General	18,530	\$10.25	\$16.28	\$18.86	\$33,847
Software Developers, Applications	6,580	\$25.67	\$43.75	\$52.62	\$90,997
Bookkeeping, Accounting, and Auditing Clerks	14,410	\$12.95	\$19.18	\$22.31	\$39,895
Accountants and Auditors	8,380	\$20.10	\$32.60	\$38.53	\$67,828
Secretaries & Admin. Assistants, excl. Legal, Medical, Exec.	15,350	\$11.42	\$17.57	\$21.04	\$36,553
Lawyers	4,580	\$30.35	\$58.78	\$68.84	\$122,248
Cashiers	22,570	\$9.22	\$11.88	\$13.46	\$24,697
Financial Managers	4,840	\$27.78	\$52.78	\$62.82	\$109,787
Sales Managers	4,280	\$27.44	\$56.19	\$70.80	\$116,879
Heavy and Tractor-Trailer Truck Drivers	11,860	\$15.20	\$19.88	\$22.30	\$41,340
Supervisors of Office and Administrative Support Workers	9,180	\$16.13	\$25.65	\$30.34	\$53,352
Laborers and Freight, Stock, and Material Movers, Hand	16,600	\$9.42	\$14.05	\$15.76	\$29,234
Software Developers, Systems Software	4,690	\$32.77	\$49.08	\$58.05	\$102,090

*10th percentile, 7-county Portland Metro Area

**75th percentile, 7-county Portland Metro Area

PORTLAND METRO AREA UNION MEMBERSHIP: 2000 AND 2014

Source: unionstats.com

2012						
Sector	Observations	Employment	Members*	Covered**	% Members	% Covered
Total	1,315	966,461	151,417	164,108	15.7%	17.0%
Private	1,134	835,560	72,571	82,613	8.7%	9.9%
Public	181	130,900	78,846	81,495	60.2%	62.3%

2000						
Sector	Observations	Employment	Members*	Covered**	% Members	% Covered
Total	1,125	918,389	137,865	147,303	15	16
Private	977	801,418	72,307	78,525	9	9.8
Public	148	116,972	65,558	68,778	56	58.8

Compiled from the Current Population Survey (CPS)

Note: CPS sample sizes (denoted by "Observations") are very small for some cells. Use union estimates cautiously.

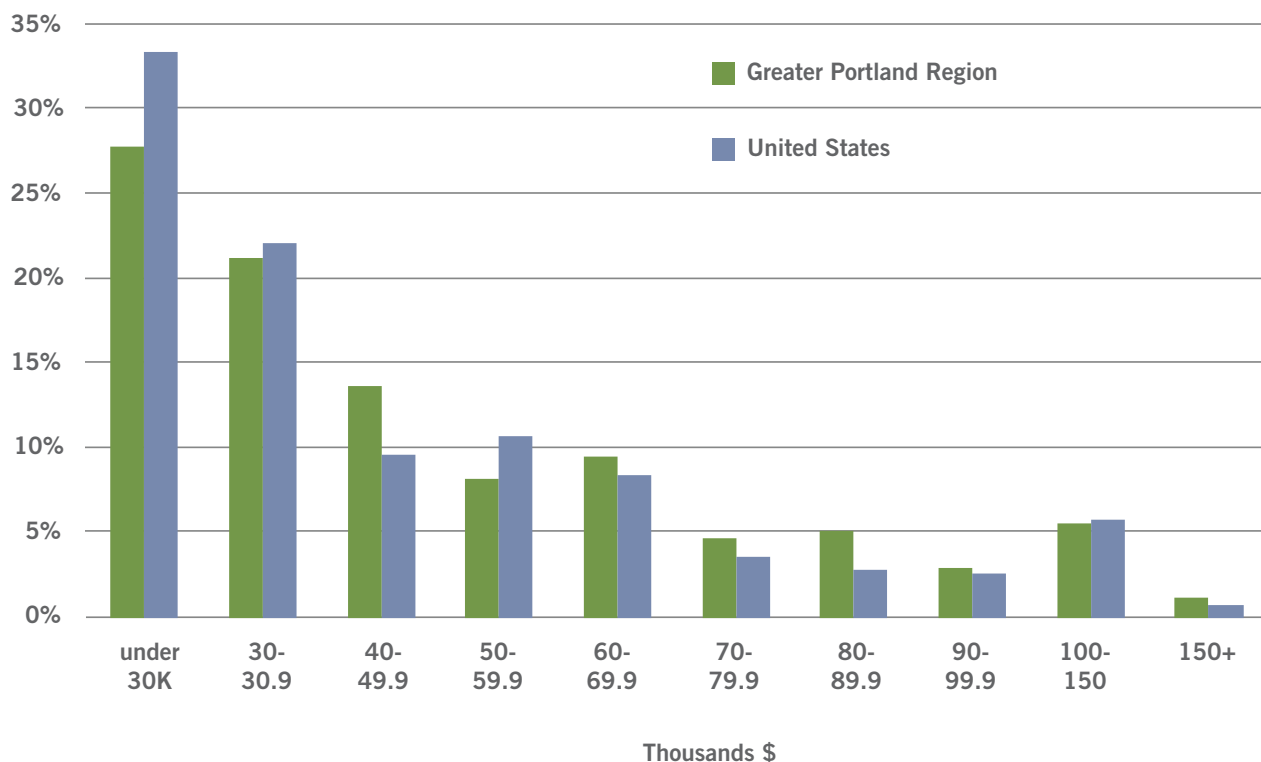
* Workers are counted as members if they respond 'yes' when asked if they are a member of a labor union or an employee organization similar to a union

** Workers are counted as covered by a collective bargaining agreement if they are union members or if they are not members but say they are covered by a union contract.

Data unavailable for Cowlitz and Wahkiakum

DISTRIBUTION OF JOBS BY AVERAGE ANNUAL WAGE GREATER PORTLAND REGION AND U.S.: 2014

Bureau of Labor Statistics



JOB VACANCY REPORT: OCCUPATIONS WITH HIGHEST NUMBER OF VACANCIES, PORTLAND TRI-COUNTY: 2015

Source: Oregon Employment Department 2015 Job Vacancy Survey

Occupation	Vacancies	% of Vacancies	Full-Time Positions	Permanent Positions	Difficult-to-Fill	Typical Entry Level Education
Total Vacancies	22,642		75%	91%	62%	
Heavy and Tractor-Trailer Truck Drivers	1,241	5.5%	77%	89%	99%	Postsecondary training
Maids and Housekeeping Cleaners	895	4.0%	91%	100%	29%	Less than high school
Retail Salespersons	854	3.8%	37%	56%	75%	High school diploma or equivalent
Motor Vehicle Operators, All Other	597	2.6%	100%	98%	0%	High school diploma or equivalent
Personal Care Aides	536	2.4%	37%	100%	60%	Less than high school
Production Workers, All Other	499	2.2%	100%	100%	1%	High school diploma or equivalent
Machinists	444	2.0%	100%	100%	94%	Postsecondary training (non-degree)
Electricians	436	1.9%	100%	65%	91%	High school diploma or equivalent
Construction Laborers	395	1.7%	100%	100%	79%	Less than high school
Computer Occupations, All Other	390	1.7%	100%	100%	98%	High school diploma or equivalent
Receptionists and Information Clerks	381	1.7%	77%	100%	39%	Less than high school
Helpers – Production Workers	371	1.6%	100%	27%	89%	Less than high school
Cashiers	360	1.6%	25%	94%	52%	Postsecondary training (non-degree)
Nursing Assistants	353	1.6%	72%	100%	63%	High school diploma or equivalent
Insurance Sales Agents	347	1.5%	100%	100%	100%	Bachelor's degree
Maintenance and Repair Workers, General	330	1.5%	100%	100%	28%	High school diploma or equivalent
Cooks, Restaurant	321	1.4%	46%	100%	99%	Associate's degree
Driver/Sales Workers	311	1.4%	75%	100%	100%	Less than high school
Bus and Truck Mechanics and Diesel Engine Specialists	301	1.3%	100%	100%	100%	High school diploma or equivalent
Managers, All Other	285	1.3%	100%	100%	81%	Less than high school

Portland Tri-County: Clackamas, Multnomah, Washington counties

JOB VACANCY REPORT: VACANCIES BY INDUSTRY: 2015

Source: Oregon Employment Department 2015 Job Vacancy Survey

Industry	Vacancies	Share of Vacancies	Average Hourly Wage (statewide)
All Industries	22,642		\$15.68
Health care and social assistance	3,848	17%	\$14.89
Management, administrative, and waste services	2,160	10%	\$14.66
Leisure and hospitality	2,503	11%	\$10.17
Manufacturing	2,137	9%	\$16.45
Wholesale trade	1,848	8%	\$17.11
Retail trade	2,310	10%	\$13.06
Other services	1,749	8%	\$15.51
Transportation, warehousing, and utilities	1,328	6%	\$19.27
Construction	1,674	7%	\$19.41
Financial activities	1,197	5%	\$16.20
Professional, scientific, and technical services	850	4%	\$26.69
Information	568	3%	\$24.00
Private educational services	431	2%	\$23.89

Portland Tri-County: Clackamas, Multnomah, Washington counties

JOB VACANCY REPORT: VACANCIES BY REQUIRED EDUCATION LEVEL

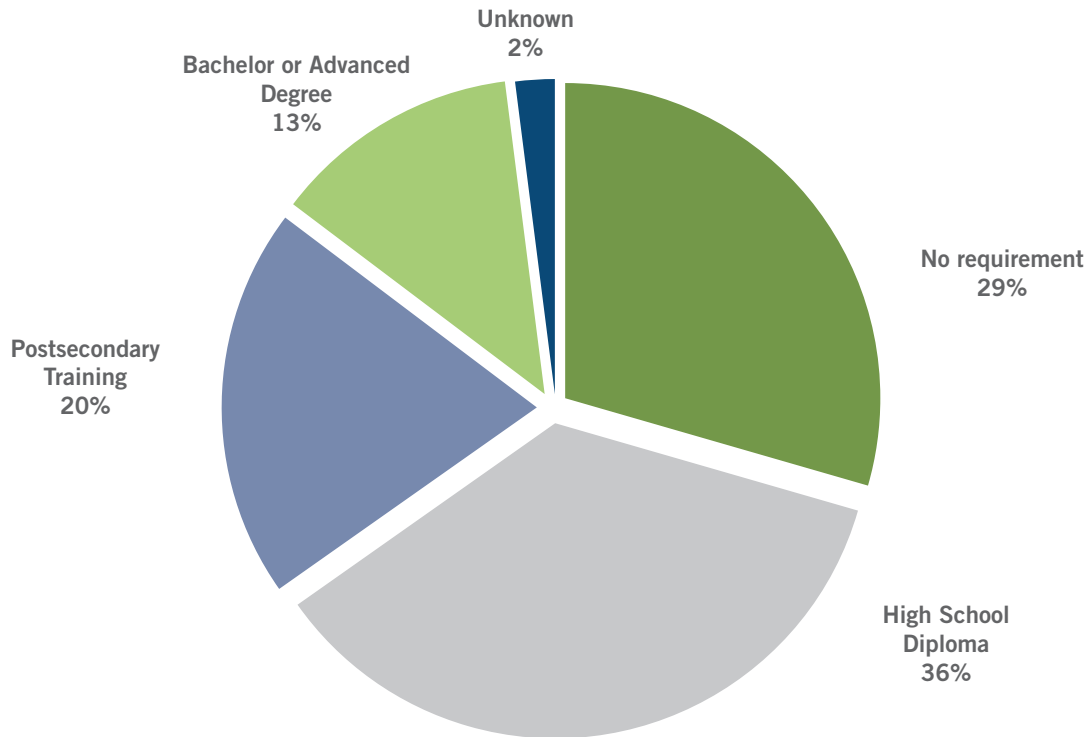
Source: Oregon Employment Department 2015 Job Vacancy Survey

Required Education Level	Vacancies	Average Hourly Wage	Full-time Positions	Permanent Positions	Requiring Previous Experience	Difficult to Fill
All Education Levels	22,642	\$16.83	75%	91%	67%	62%
No Requirement	6,673	\$12.29	62%	87%	50%	55%
High School Diploma	8,097	\$14.48	72%	90%	64%	62%
Postsecondary Training	4,541	\$21.86	88%	96%	88%	76%
Bachelor or Advanced Degree	2,874	\$29.39	95%	97%	90%	64%
Unknown	457	\$12.96	62%	100%	30%	0%

Portland Tri-County: Clackamas, Multnomah, Washington counties

PORTLAND TRI-COUNTY JOB VACANCIES BY EDUCATIONAL REQUIREMENT, PORTLAND TRI-COUNTY: 2015

Source: Oregon Employment Department 2015 Job Vacancy Survey



JOB VACANCY REPORT, VACANCIES BY HOURLY WAGE, PORTLAND TRI-COUNTY: 2015

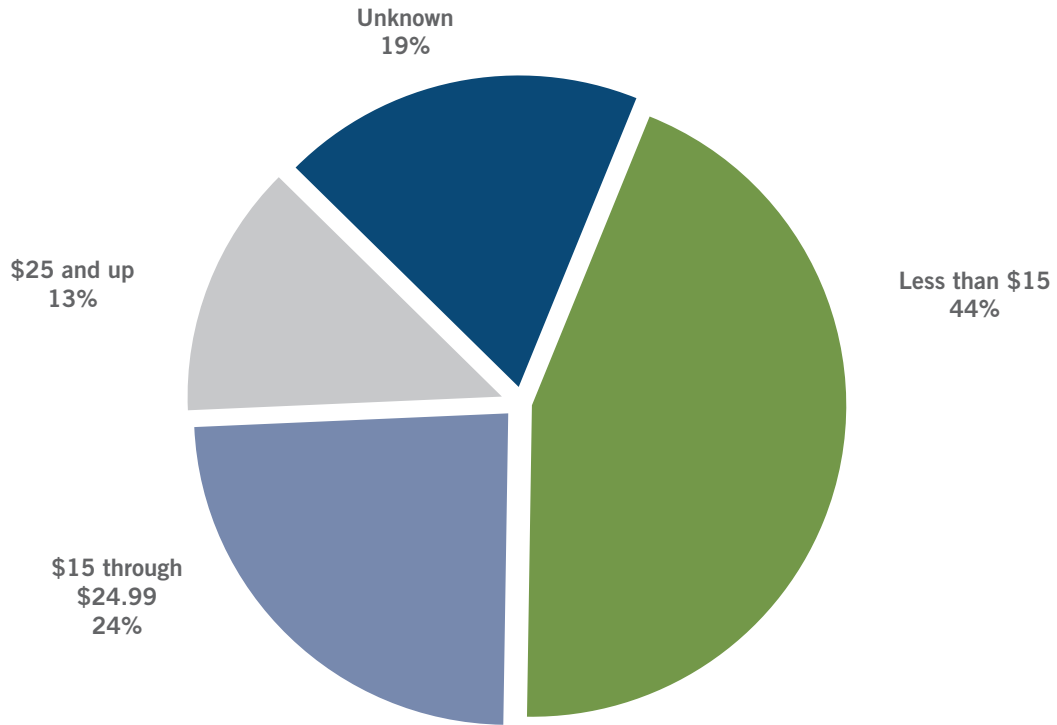
Source: Oregon Employment Department 2015 Job Vacancy Survey

Wage (per hour)	Vacancies	Average Hourly Wage	Full-time Positions	Permanent Positions	Requiring Education Beyond High School	Requiring Previous Experience	Difficult to Fill
All Wage Ranges	22,642	\$16.83	75%	91%	25%	67%	62%
Less than \$15	9,994	\$10.76	61%	87%	4%	46%	62%
\$15 through \$24.99	5,445	\$18.57	94%	96%	43%	84%	78%
\$25 and up	2,975	\$34.03	95%	100%	66%	98%	71%
Unknown	4,228		71%	91%	26%	74%	34%

Portland Tri-County: Clackamas, Multnomah, Washington counties

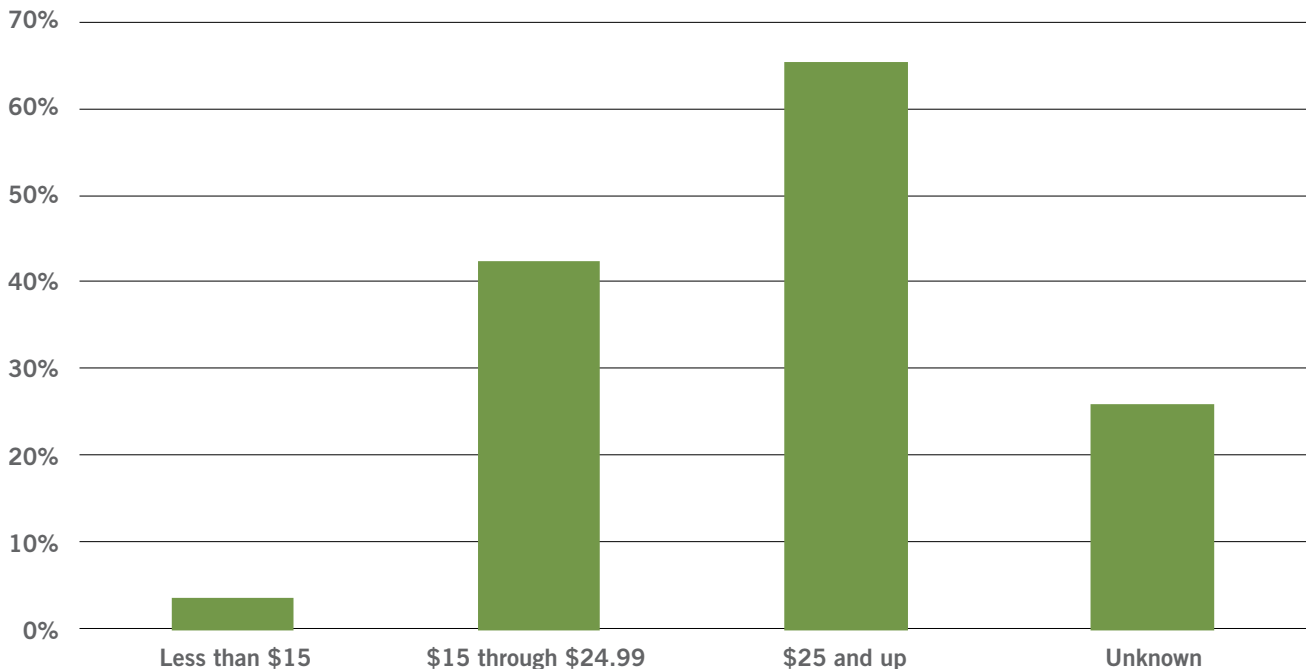
PORTLAND TRI-COUNTY JOB VACANCIES BY HOURLY WAGE, PORTLAND TRI-COUNTY: 2015

Source: Oregon Employment Department 2015 Job Vacancy Survey



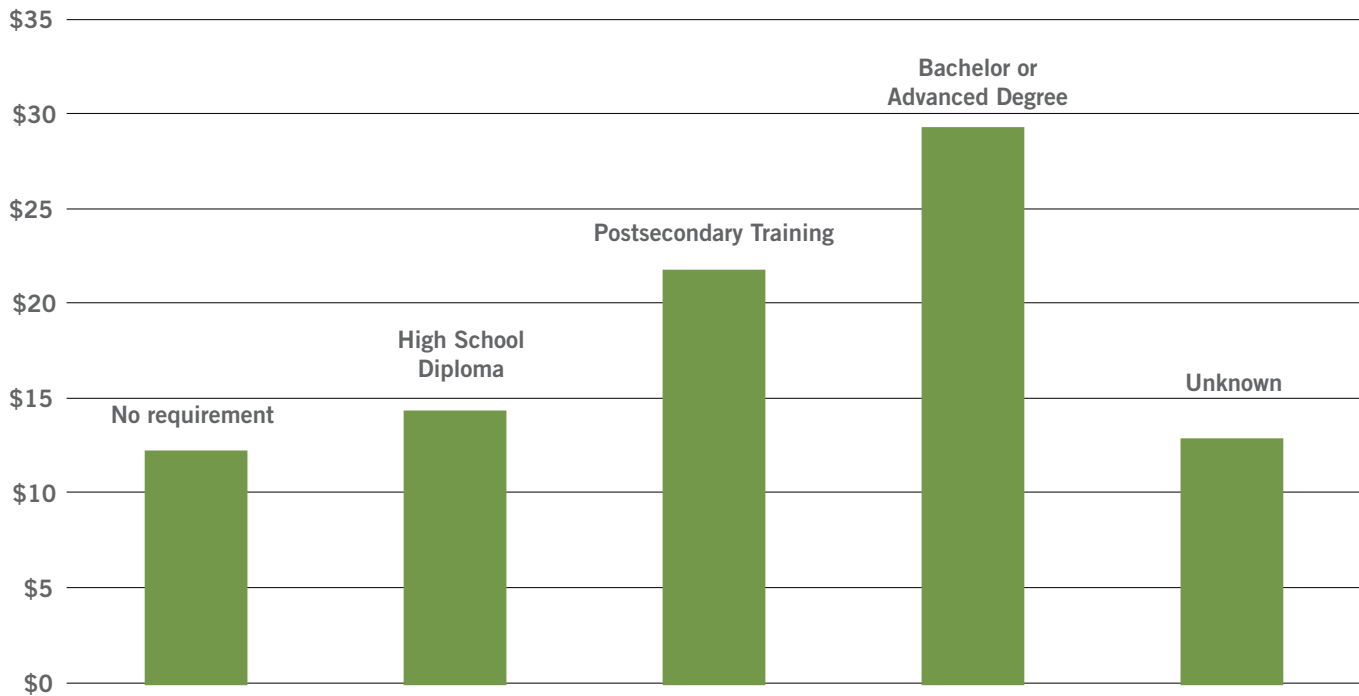
SHARE OF PORTLAND TRI-COUNTY JOB VACANCIES REQUIRING EDUCATION BEYOND HIGH SCHOOL BY HOURLY WAGE RANGE: 2015

Source: Oregon Employment Department 2015 Job Vacancy Survey



AVERAGE HOURLY WAGE FOR PORTLAND TRI-COUNTY JOB VACANCIES BY EDUCATIONAL REQUIREMENT: 2015

Source: Oregon Employment Department 2015 Job Vacancy Survey



JOB VACANCY REPORT, REASONS FOR DIFFICULT-TO-FILL POSITIONS (EMPLOYER PERSPECTIVE), PORTLAND TRI-COUNTY: 2015

Source: Oregon Employment Department 2015 Job Vacancy Survey

	Reason Provided by Employer	Difficult-to-Fill Vacancies	Share of Vacancies w/ Reasons Provided
Difficult to control...	Lack of applicants	5,022	37%
	Unfavorable working conditions	1,343	10%
	Other	1,098	8%
	Low wages	474	3%
	Location	7	0%
Can we do something?	Lack of qualified candidates	2,549	19%
	Lack of work experience	1,381	10%
	Lack of technical skills	490	4%
	Lack of soft skills	626	5%
	Lack of certification	376	3%
	Lack of training	181	1%
	Total w/ Reasons Provided	13,547	100%

Portland Tri-County: Clackamas, Multnomah, Washington counties

THE COLUMBIA-WILLAMETTE WORKFORCE COLLABORATIVE



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