

Oregon Talent Assessment

2020 Update

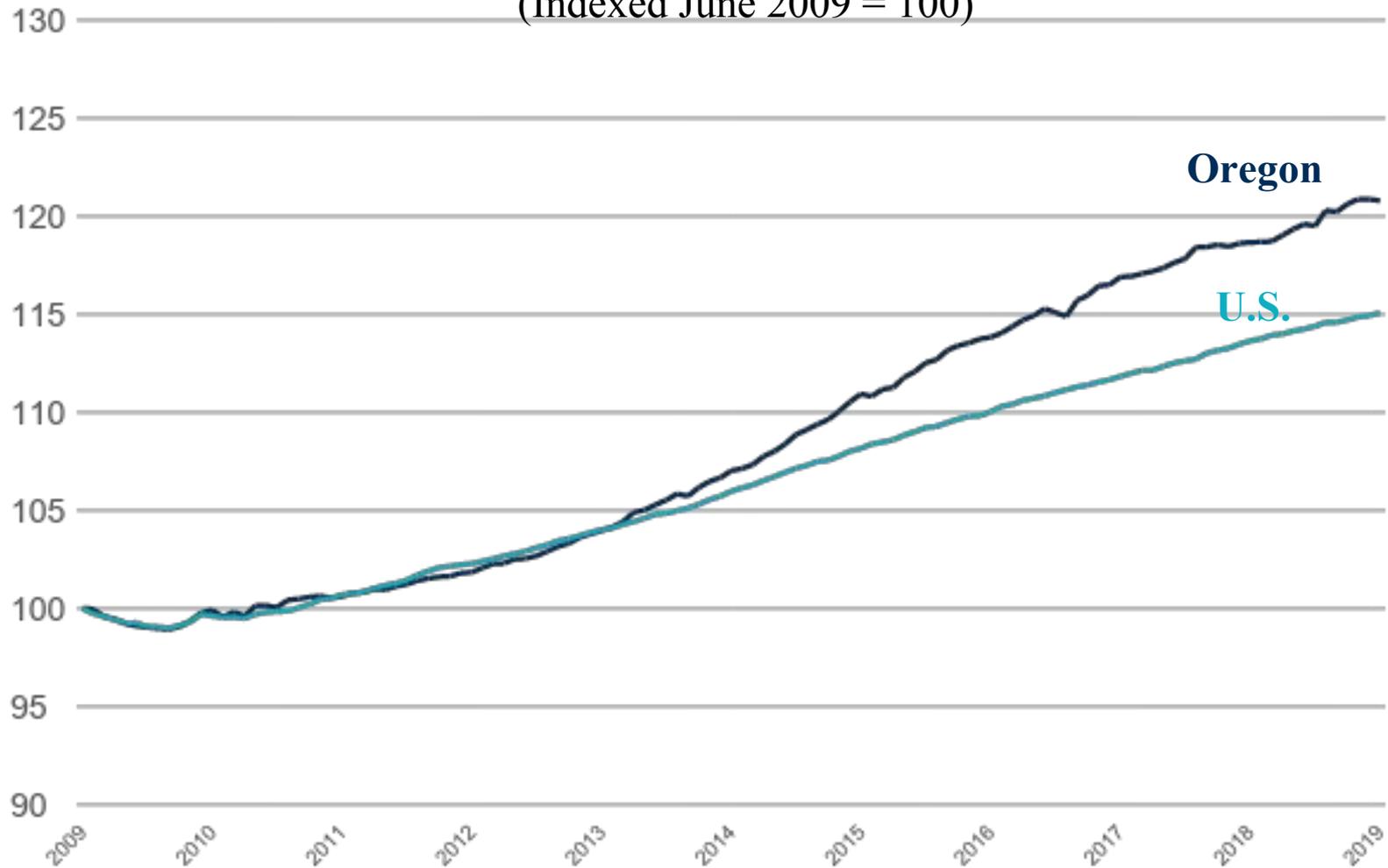
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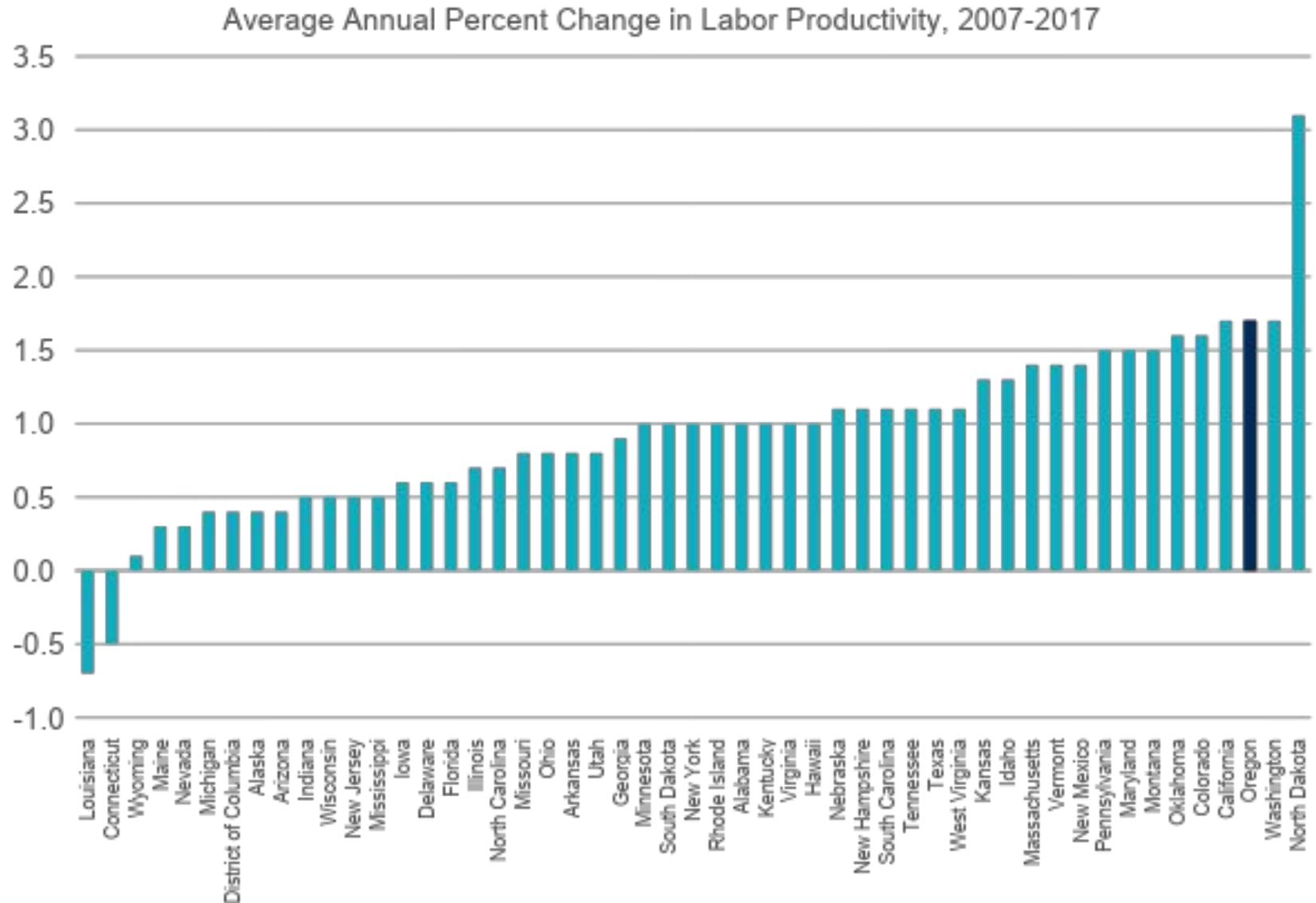
The Big Picture

Oregon job growth outpacing the nation's

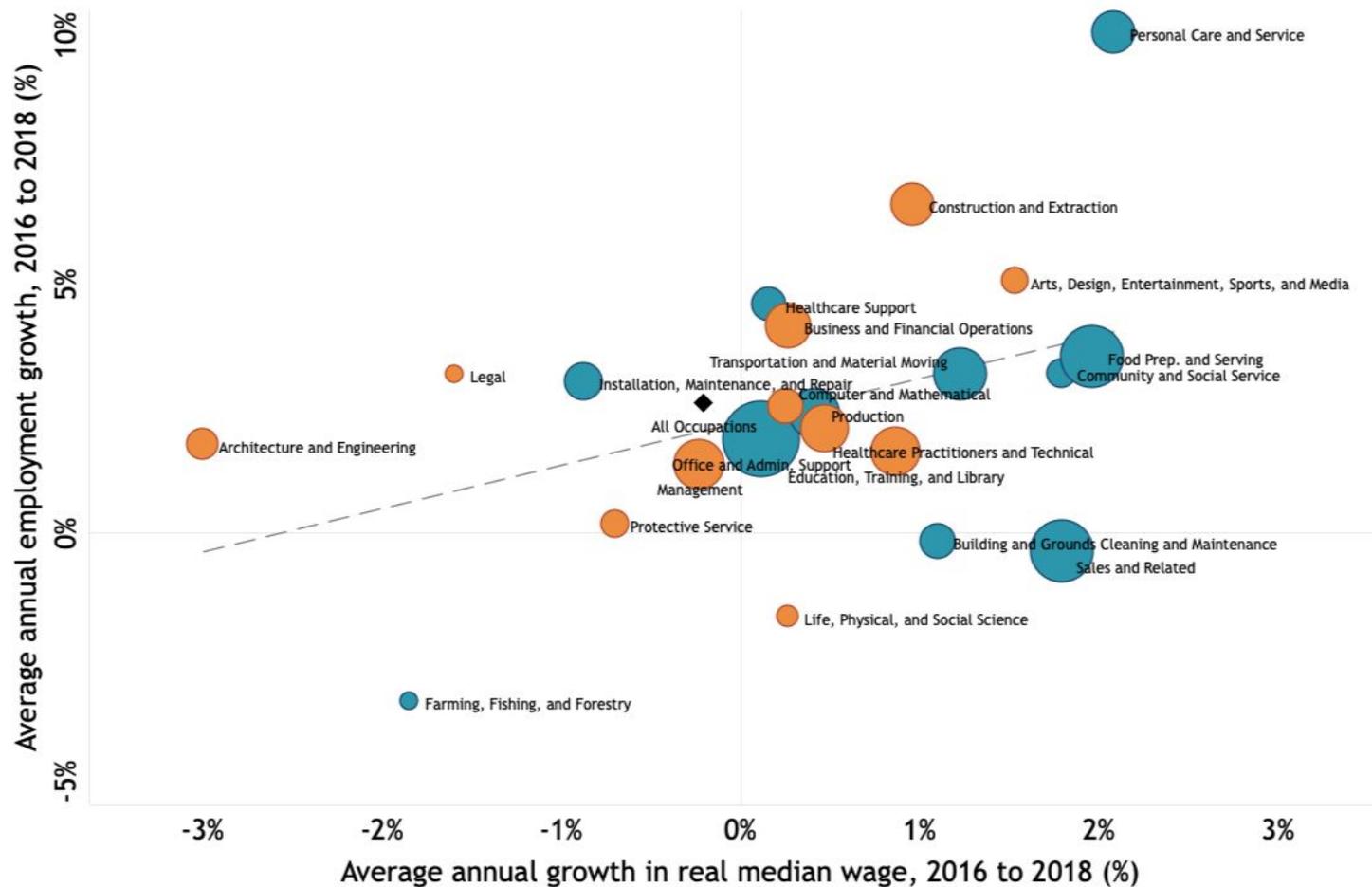
Change in Nonfarm Employment Since June 2009,
(Indexed June 2009 = 100)



Productivity gains outpacing the nation's

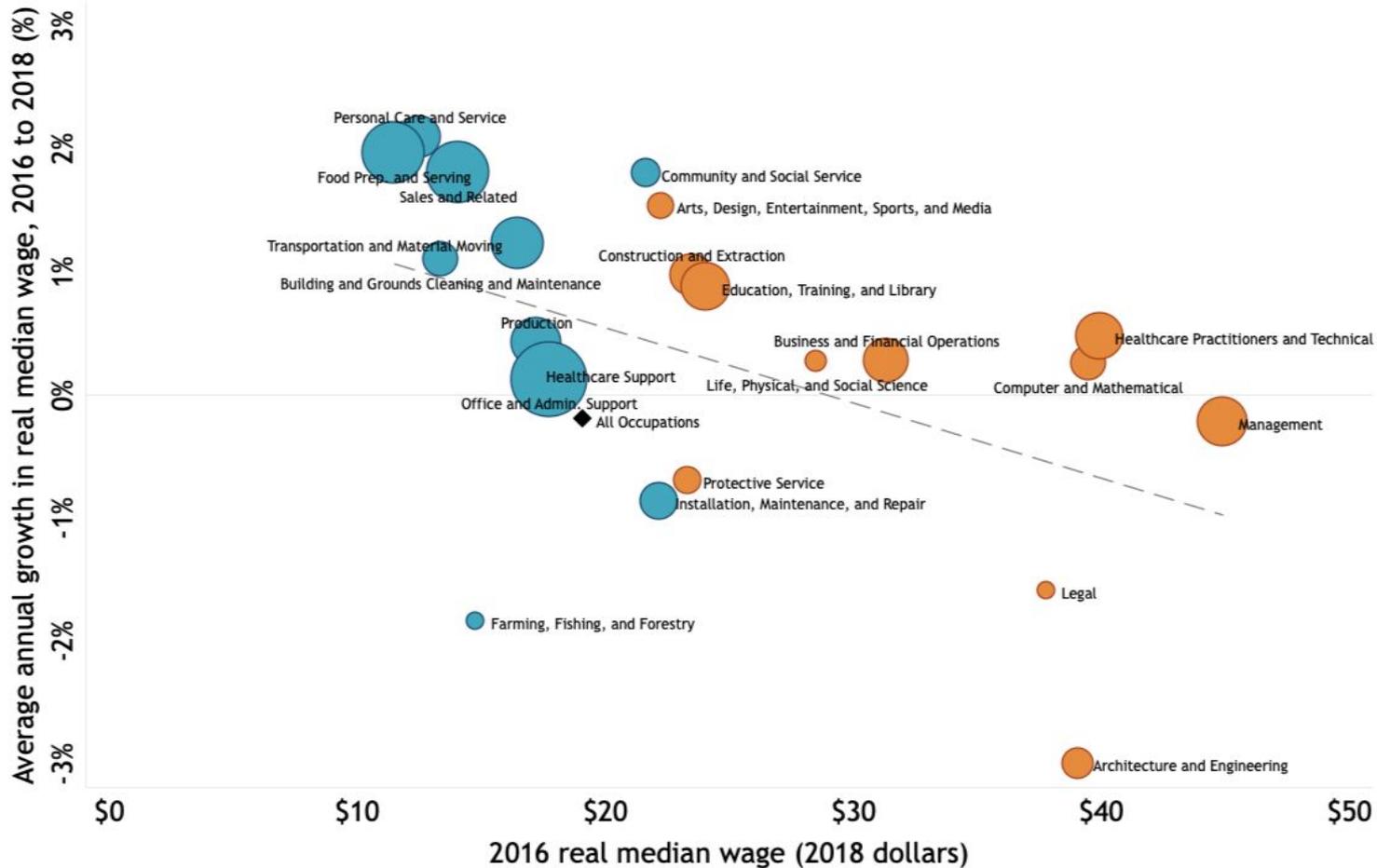


Wage gains show a relationship to job growth



● Real 2018 wages 50th percentile and below ● Real 2018 wages 50th percentile and above

Low-wage occupations have higher wage growth



● Real 2016 wages 50th percentile and below ● Real 2016 wages 50th percentile and above

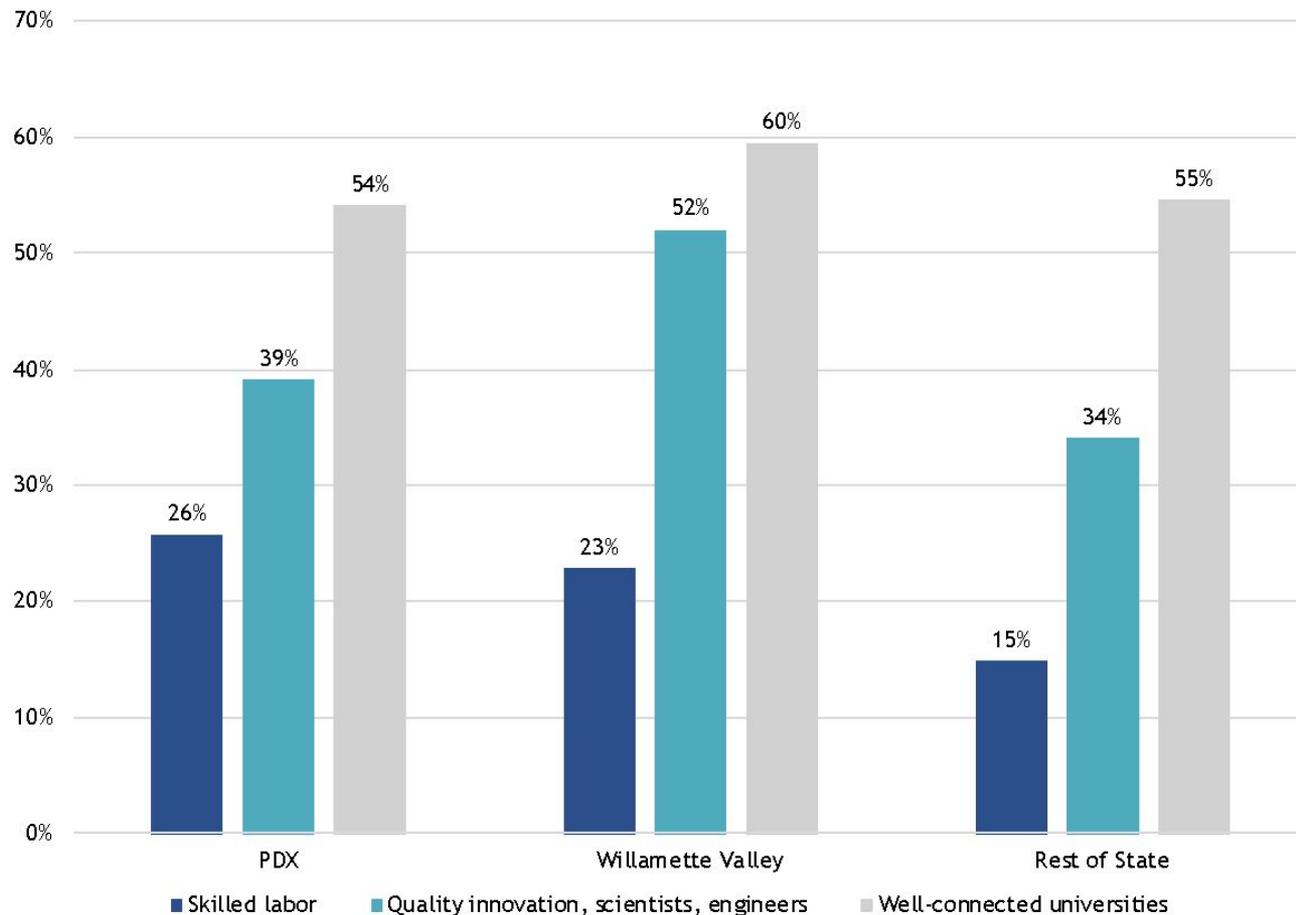
Employers' Perspective

OBC/DHM survey of senior executives

- Survey asked executives to assess Oregon business conditions on a range of factors (e.g., taxes, regulatory policy, quality of life, skilled labor)
- 469 senior executives (CEOs, presidents, CFOs, COOs, vice presidents) responded to the survey during August-September 2019
- Executives represented a wide range of local- and traded-sector industries

Employers have mixed views on the condition of the labor force

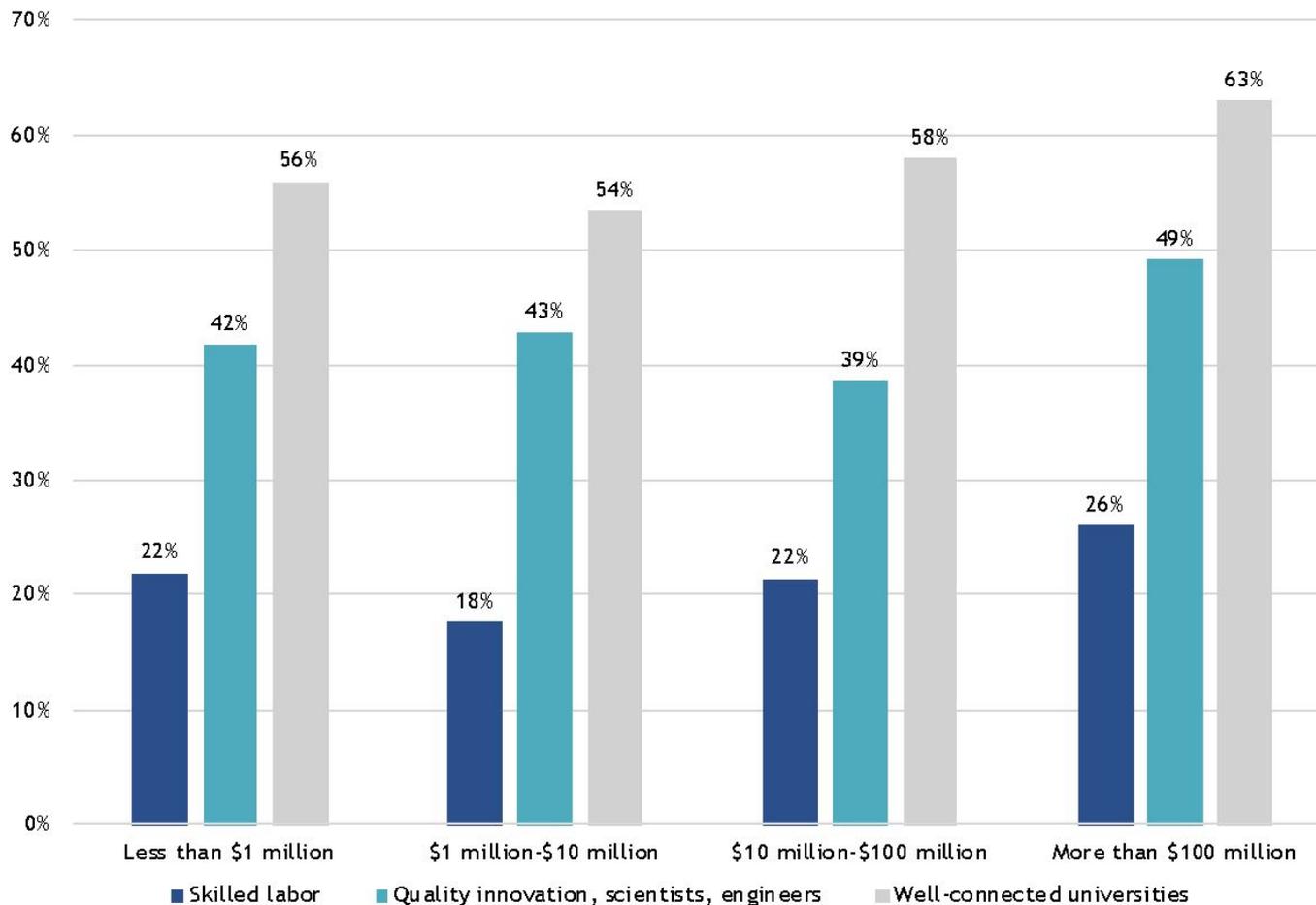
Share of survey respondents indicating that each element is a competitive strength for Oregon, by region, September 2019



Source: Oregon Business Council Business Climate Survey, 2019

Employers have mixed views on the condition of the labor force

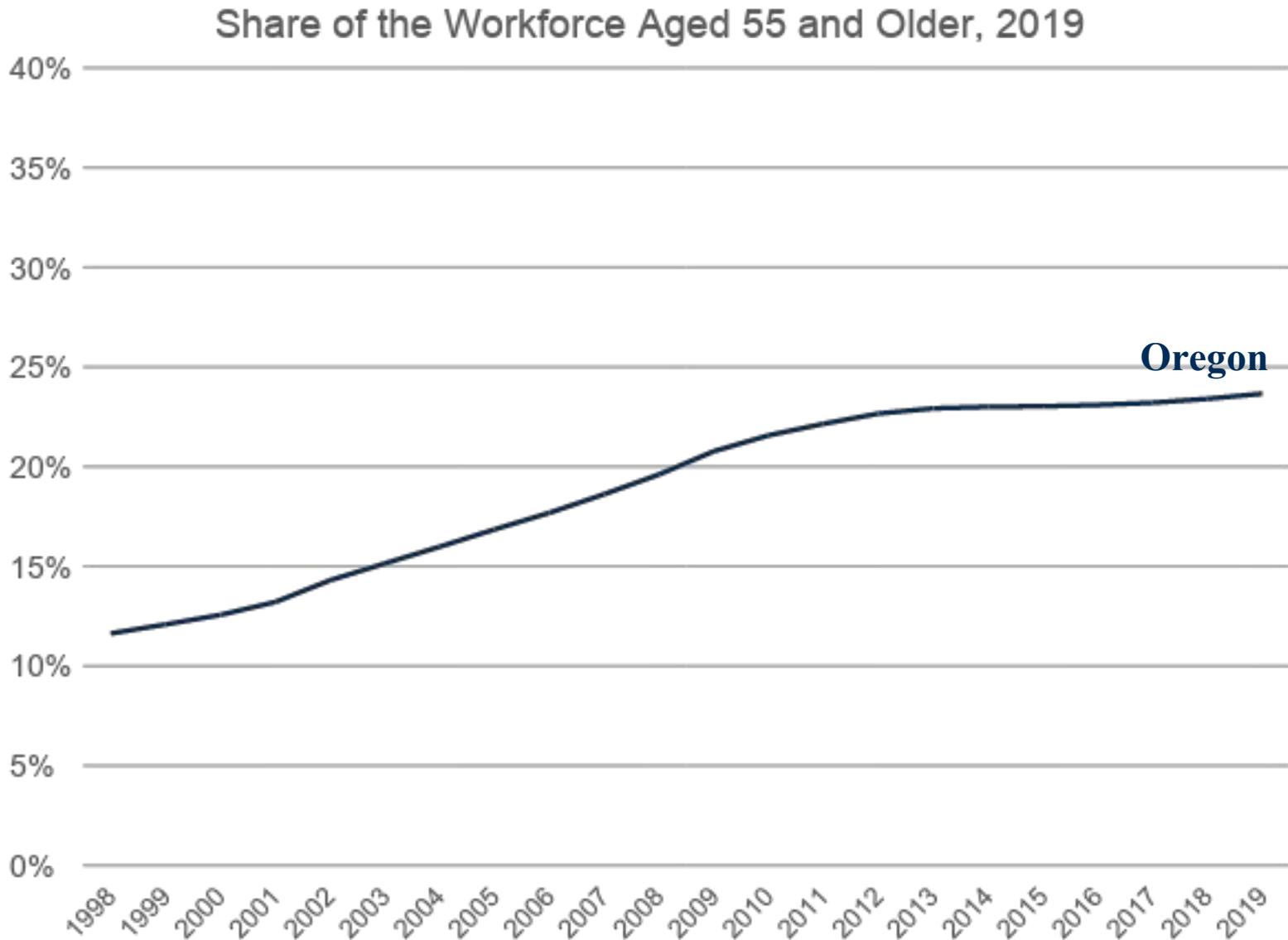
Share of survey respondents indicating that each element is a competitive strength for Oregon, by firm size, September 2019



Source: Oregon Business Council Business Climate Survey, 2019

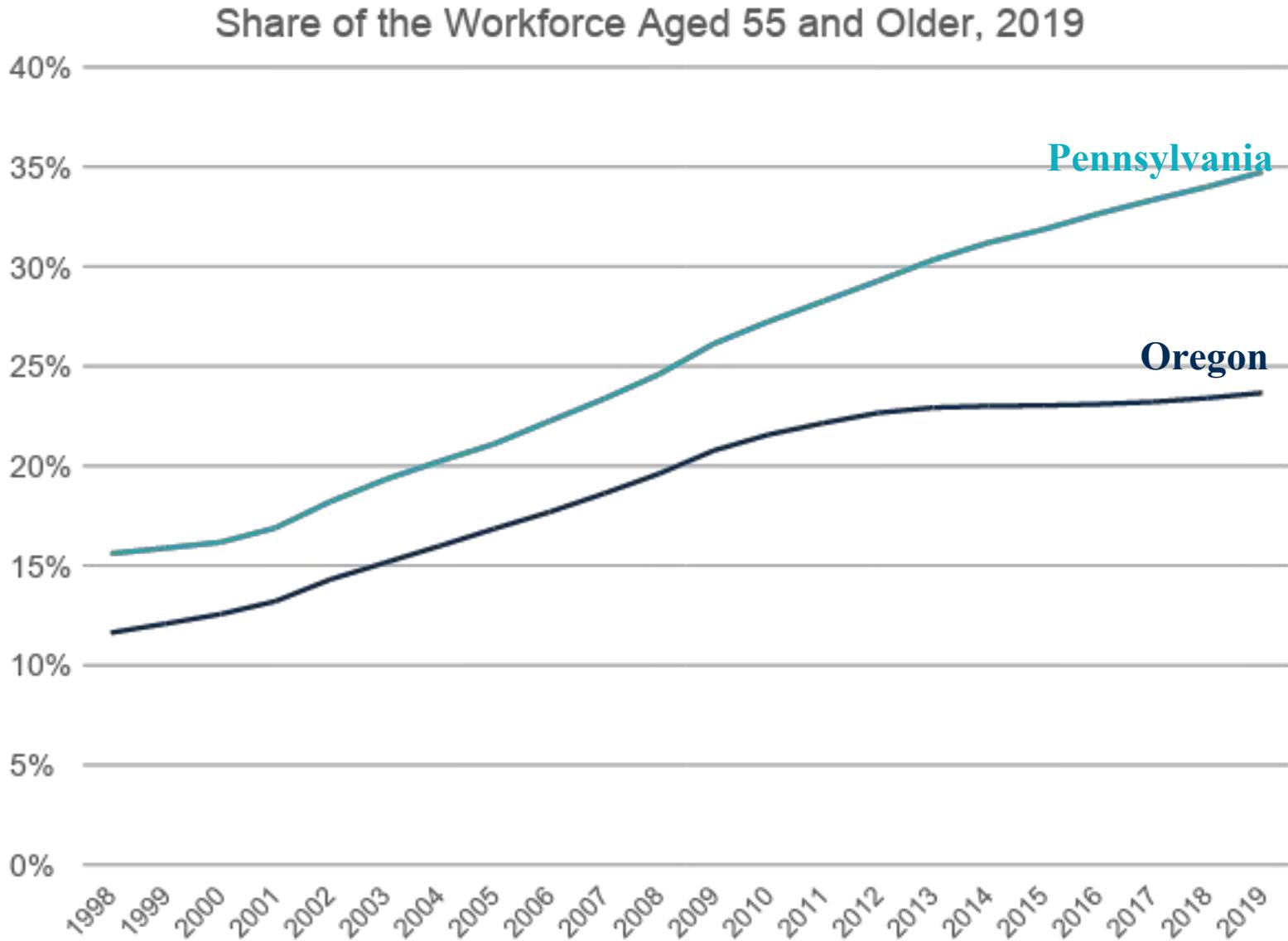
The Future of Work

Automation is not the only mega-trend



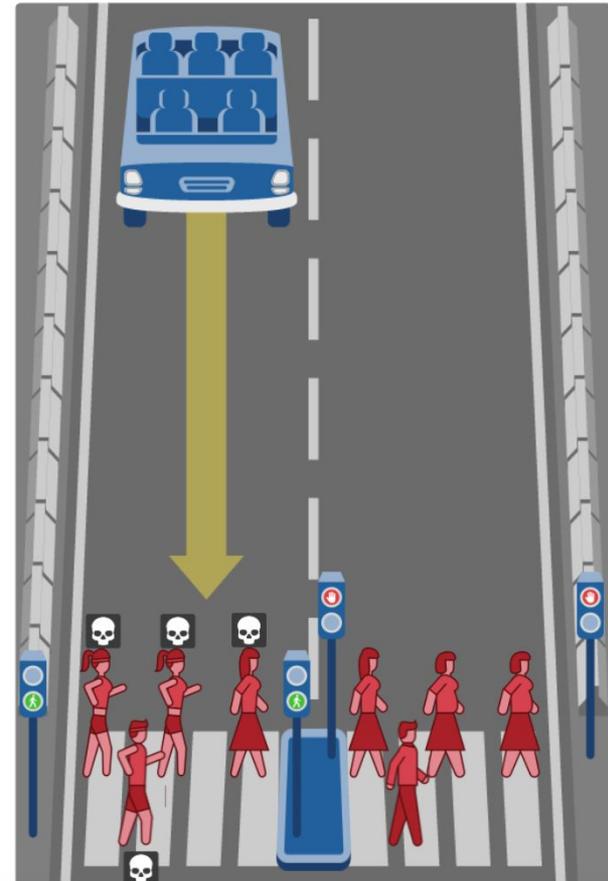
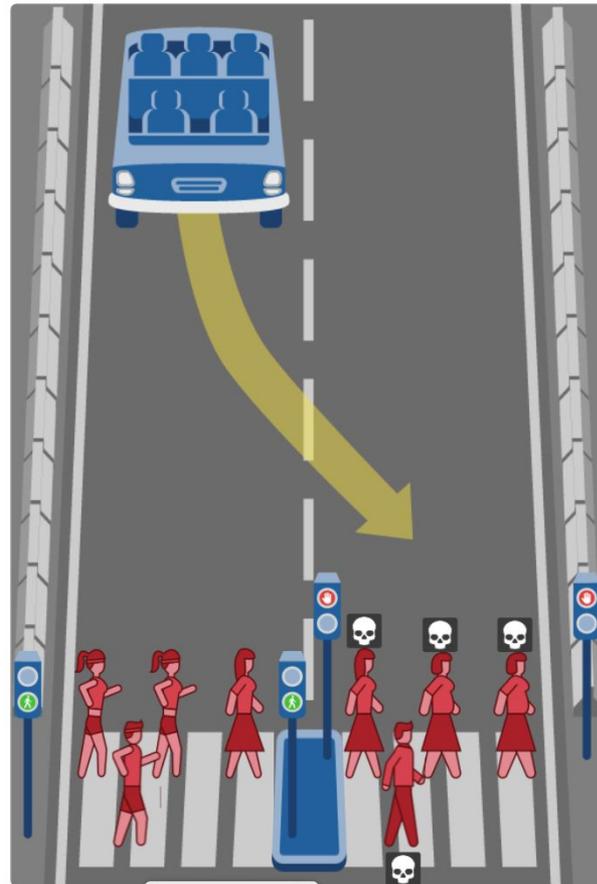
Source: QWI Explorer application, U.S. Census Bureau

Automation is not the only mega-trend



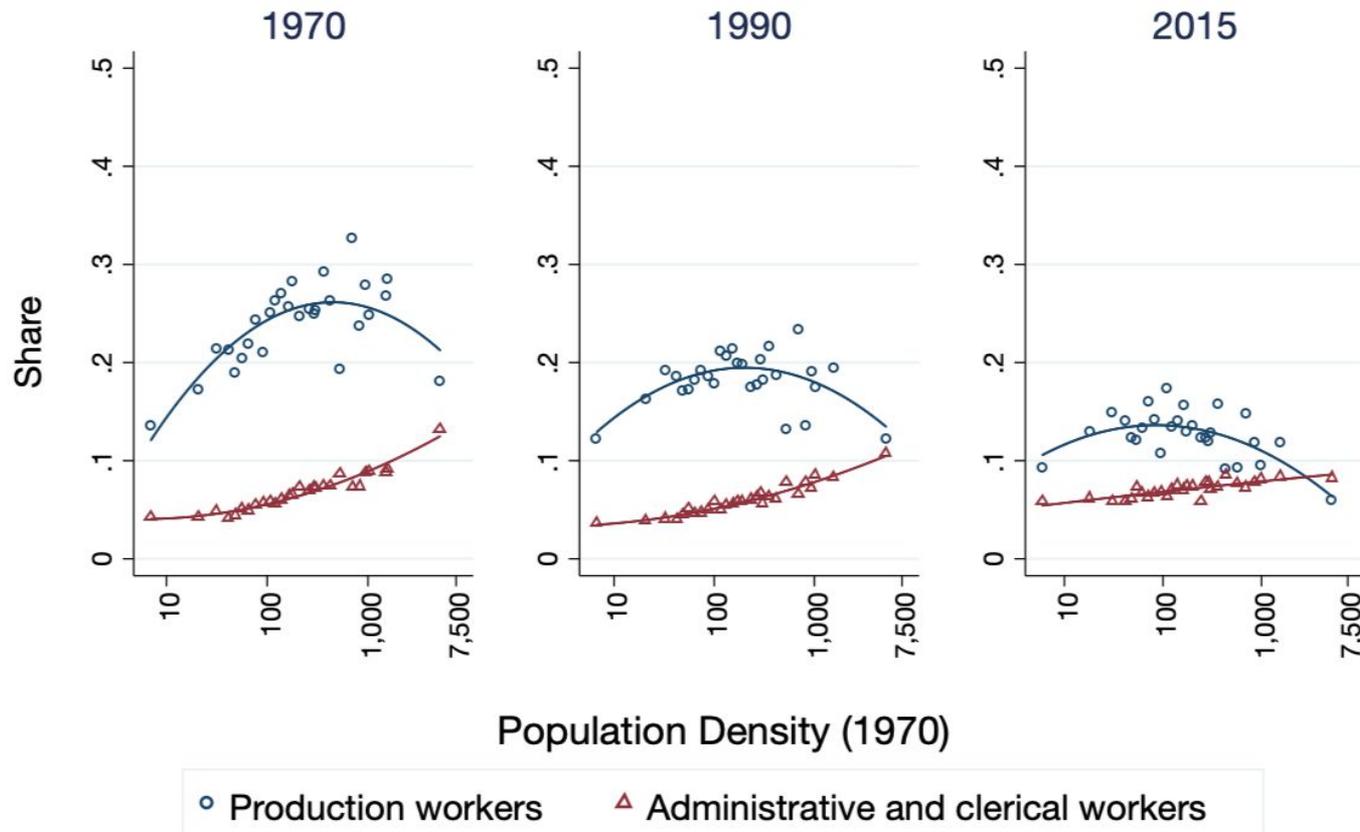
Technology will progress but has questions to answer

What should the self-driving car do?



Opportunities declining for non-college men in metro areas

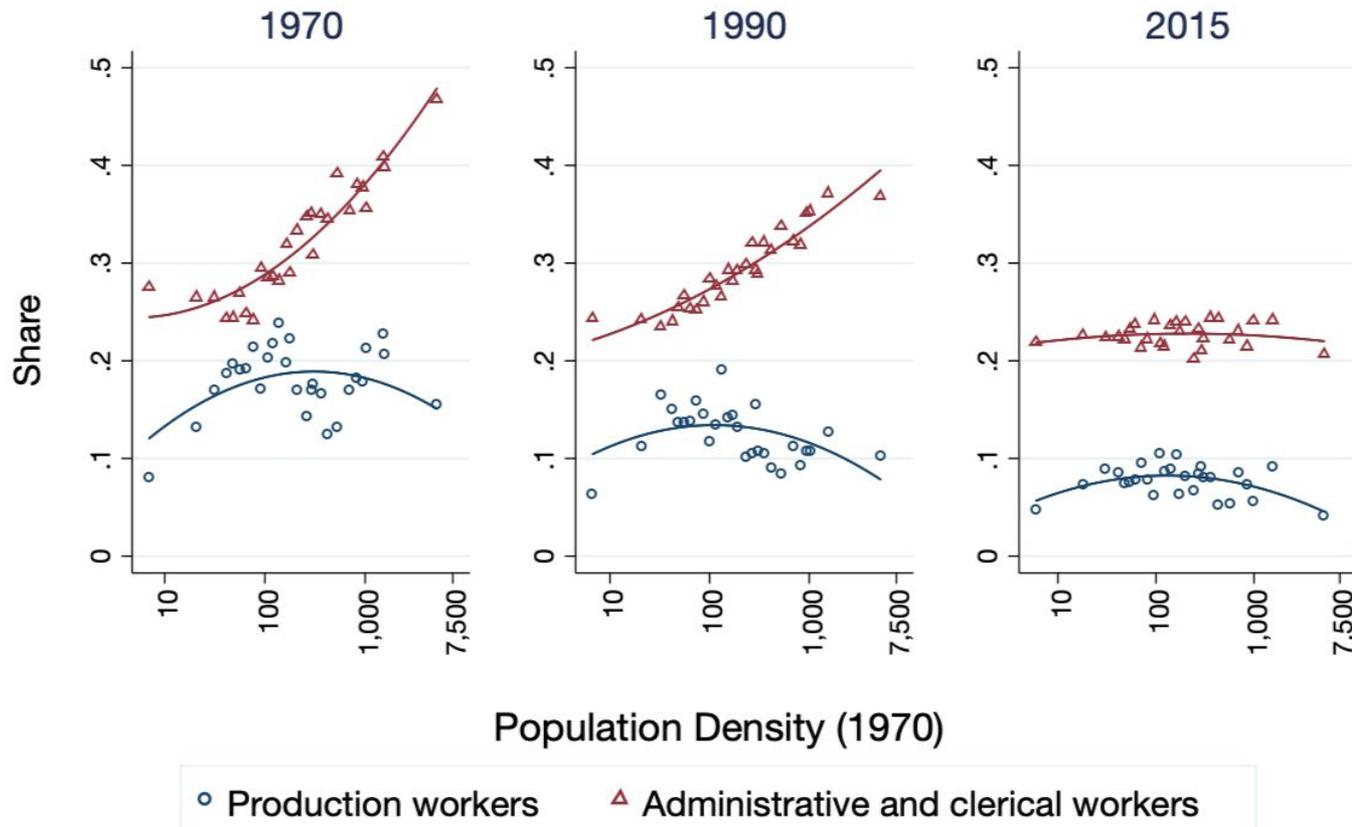
Production and Administrative and Clerical Employment
Non-College Men: High School or Below



Source: Autor, David. *Work of the Past, Work of the Future*

Opportunities declining for non-college women in metro areas

Production and Administrative and Clerical Employment
Non-College Women: High School or Below



Source: Autor, David. *Work of the Past, Work of the Future*



Frontier work pays 30% above average

Source: Autor, David. *Work of the Past, Work of the Future*



Last-mile work pays 20% below average

Source: Autor, David. *Work of the Past, Work of the Future*



Wealth work pays at about the average

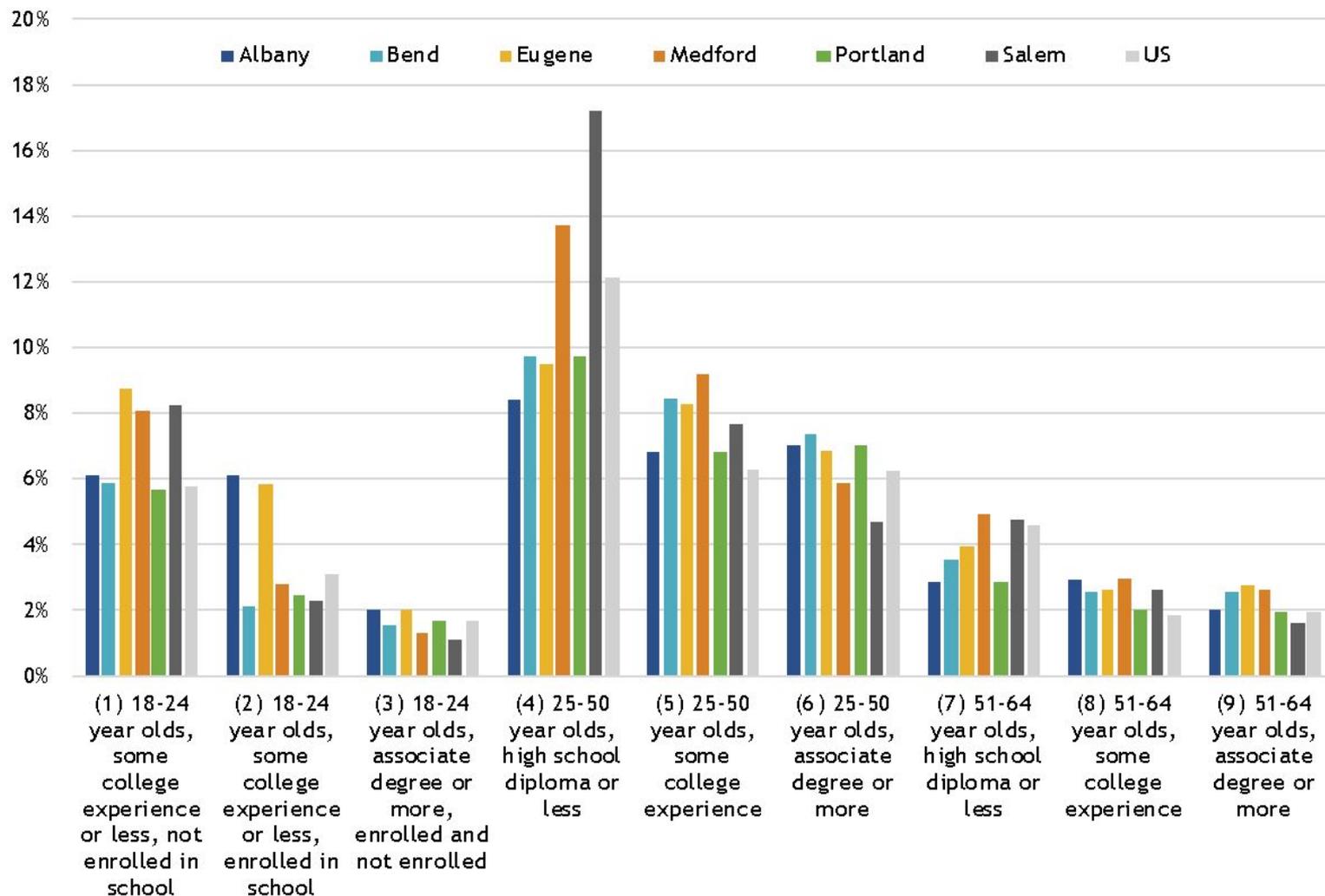
Source: Autor, David. *Work of the Past, Work of the Future*

Low-wage workers fall into nine clusters

1. Ages 18-24 not in school, no college degree
2. Ages 18-24 in school, no college degree
3. Ages 18-24, with an associate degree or more
4. Ages 25-50, with a high school diploma or less
5. Ages 25-50, with some college but no degree
6. Ages 25-50, with an associate degree or more
7. Ages 51-64, with a high school diploma or less
8. Ages 51-64, with some college but no degree
9. Ages 51-64, with an associate degree or more

Characteristics of low-wage workers vary across geography

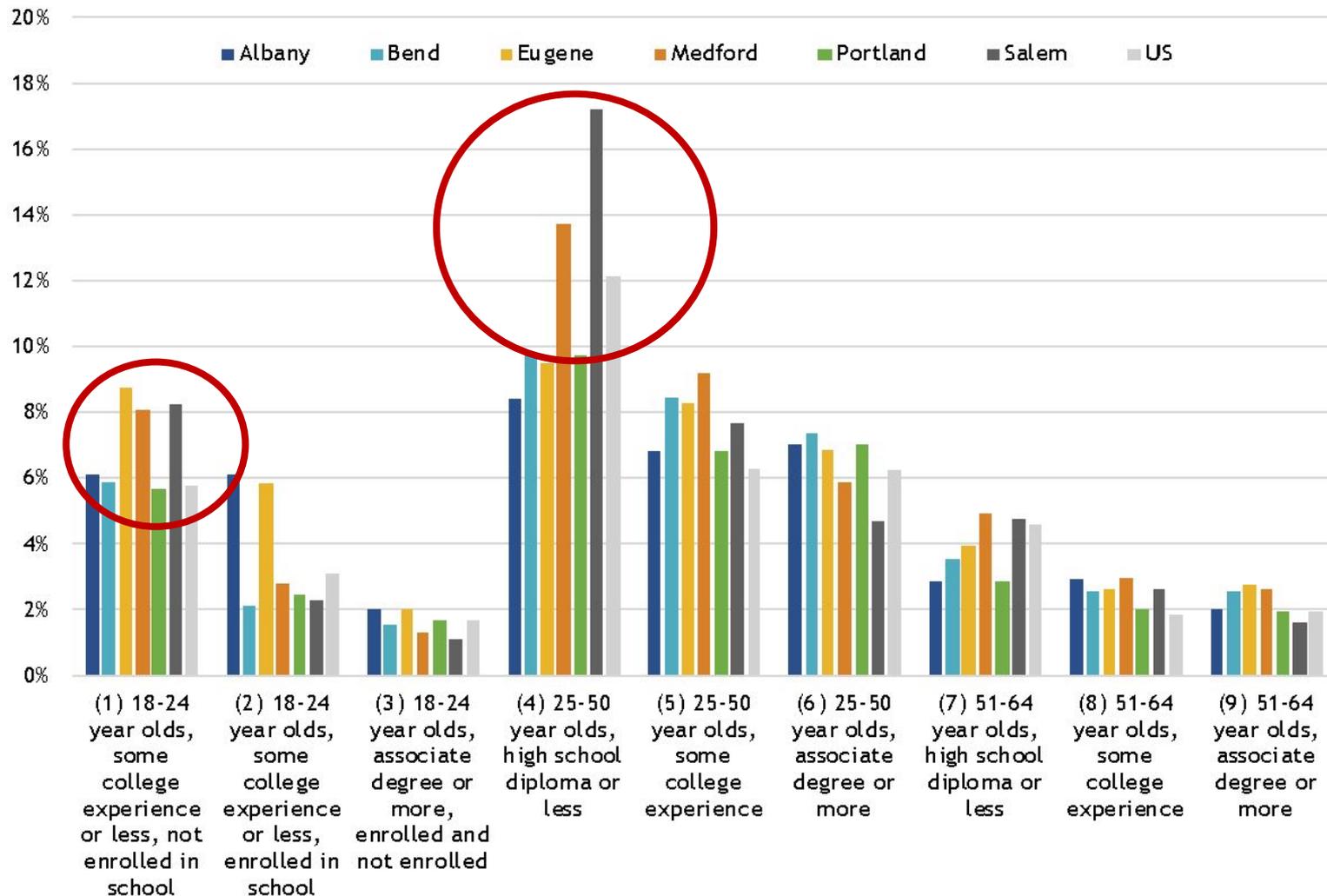
Percent of metro area's workers who have low wages, by cluster, 2016



Source: Ross, Martha and Bateman, Nicole. "Meet the Low-wage Workforce." *Brookings Metropolitan Policy Program*. November 2019

Characteristics of low-wage workers vary across geography

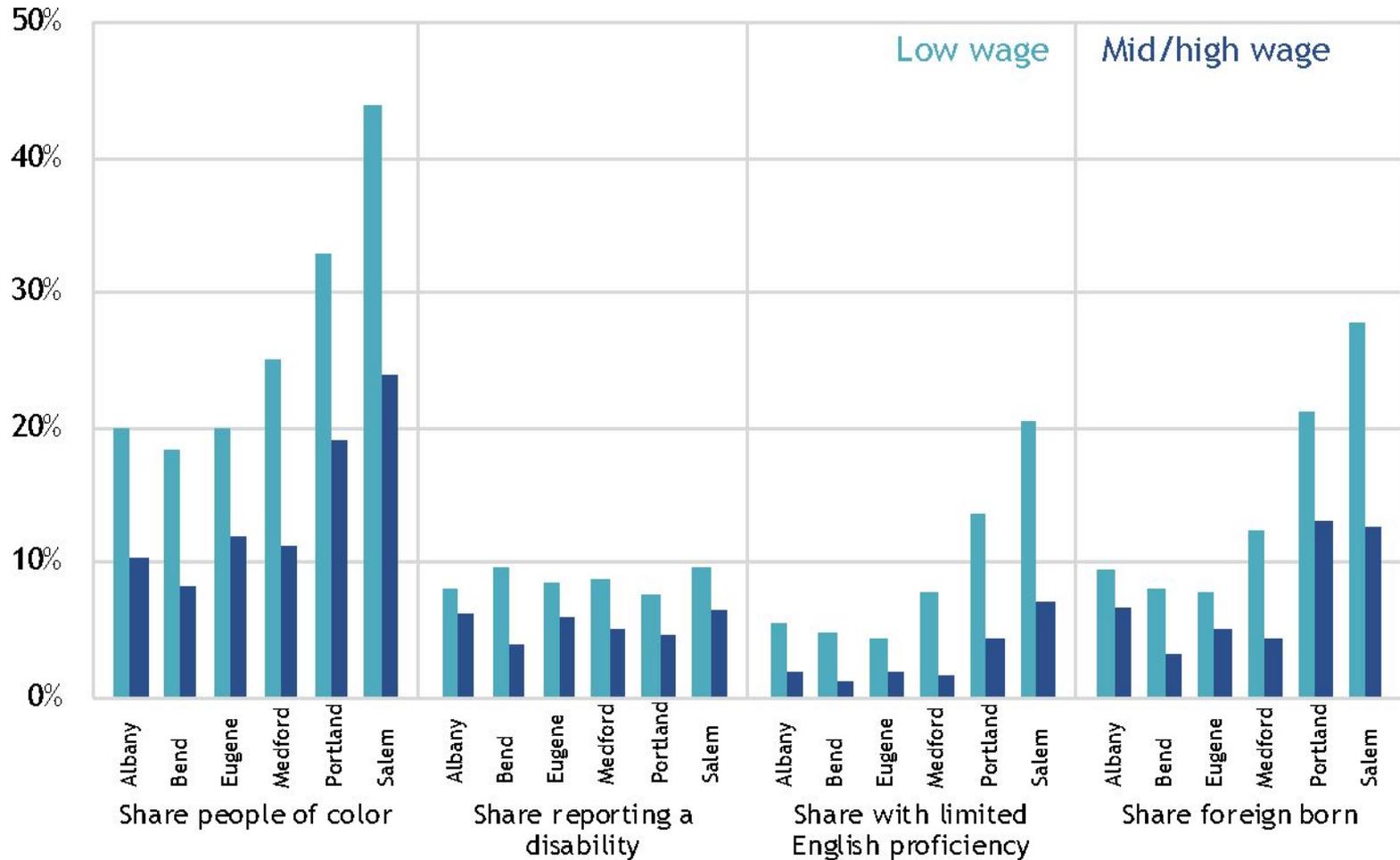
Percent of metro area's workers who have low wages, by cluster, 2016



Source: Ross, Martha and Bateman, Nicole. "Meet the Low-wage Workforce." *Brookings Metropolitan Policy Program*. November 2019

People from underserved populations disproportionately perform low-wage work

Characteristics of low-wage workers versus mid- to high-wage workers in Oregon metro areas, 2016



Source: Ross, Martha and Bateman, Nicole. "Meet the Low-wage Workforce." *Brookings Metropolitan Policy Program*. November 2019

Training for Work for the Future

Plan and Pay for College

- ▶ PLAN AND PAY FOR COLLEGE - HOME
- ⊕ PREPARE FOR SUCCESS IN COLLEGE AND CAREER
- PAY FOR COLLEGE
- ⊕ TOOLS FOR TRANSFER STUDENTS
- COUNSELOR AND ADVISOR RESOURCES
- FIND OREGON COLLEGES, UNIVERSITIES AND PROGRAMS



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- [Oregon Opportunity Grant](#)
- [Oregon Promise](#)
- [OSAC Scholarships](#)
- [Financial Aid for Undocumented Students](#)



- [Student and Family Resources](#)
- [Explore Careers & the Labor Market](#)
- [College Navigator](#)
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Center on Education and the Workforce



HOME		PUBLICATIONS					PRESS ROOM			PROJECTS				ABOUT CEW		
	Institution ▼▲	State ▼▲	Level ▼▲	Predominant degree ▼▲	Institution type ▼▲	Average age at entry ▼▲	10-year NPV rank ▼▲	10-year NPV ▼▲	15-year NPV rank ▼▲	15-year NPV ▼▲	20-year NPV rank ▼▲	20-year NPV ▼▲	30-year NPV rank ▼▲	30-year NPV ▼▲	40-year NPV rank ▼▲	40-year NPV ▼
1	Perry Technical Institute	WA	2-year	Certificate	Private nonprofit	25	227	\$195,000	160	\$409,000	154	\$603,000	171	\$938,000	189	\$1,213,000
2	Shoreline Community College	WA	2-year	Certificate	Public	28	197	\$202,000	281	\$363,000	384	\$509,000	568	\$761,000	683	\$967,000
3	Bates Technical College	WA	2-year	Certificate	Public	32	330	\$181,000	417	\$334,000	600	\$473,000	828	\$712,000	960	\$908,000
4	Pierce College-Puyallup	WA	2-year	Associate's	Public	27	500	\$167,000	652	\$311,000	853	\$442,000	1146	\$667,000	1268	\$852,000
5	Walla Walla Community College	WA	2-year	Certificate	Public	26	515	\$166,000	797	\$301,000	1107	\$423,000	1439	\$635,000	1597	\$808,000
6	Big Bend Community College	WA	2-year	Associate's	Public	25	923	\$149,000	1030	\$287,000	1256	\$412,000	1523	\$627,000	1624	\$803,000
7	Everett Community College	WA	2-year	Associate's	Public	28	780	\$154,000	1005	\$289,000	1256	\$412,000	1592	\$622,000	1691	\$795,000
8	South Puget Sound Community College	WA	2-year	Associate's	Public	28	833	\$152,000	1194	\$278,000	1596	\$392,000	1898	\$590,000	1998	\$752,000
9	Lower Columbia College	WA	2-year	Associate's	Public	28	989	\$147,000	1484	\$266,000	1953	\$373,000	2250	\$559,000	2355	\$711,000
10	Pima Medical Institute-Renton	WA	2-year	Certificate	Private for-profit	27	1709	\$124,000	2240	\$237,000	2532	\$340,000	2684	\$518,000	2735	\$663,000

Source: <https://cew.georgetown.edu/cew-reports/collegeroi/>

Improve access through better information and technology

CAREER PATHWAYS

CLICK ON THE LOCATION NEAREST YOU.

GET STARTED HERE!

By clicking on the location nearest you on this map, you will be redirected to the Career Pathways webpage with your local community college to connect to the courses, skills, and credentials you will need to prepare for a high-demand job.

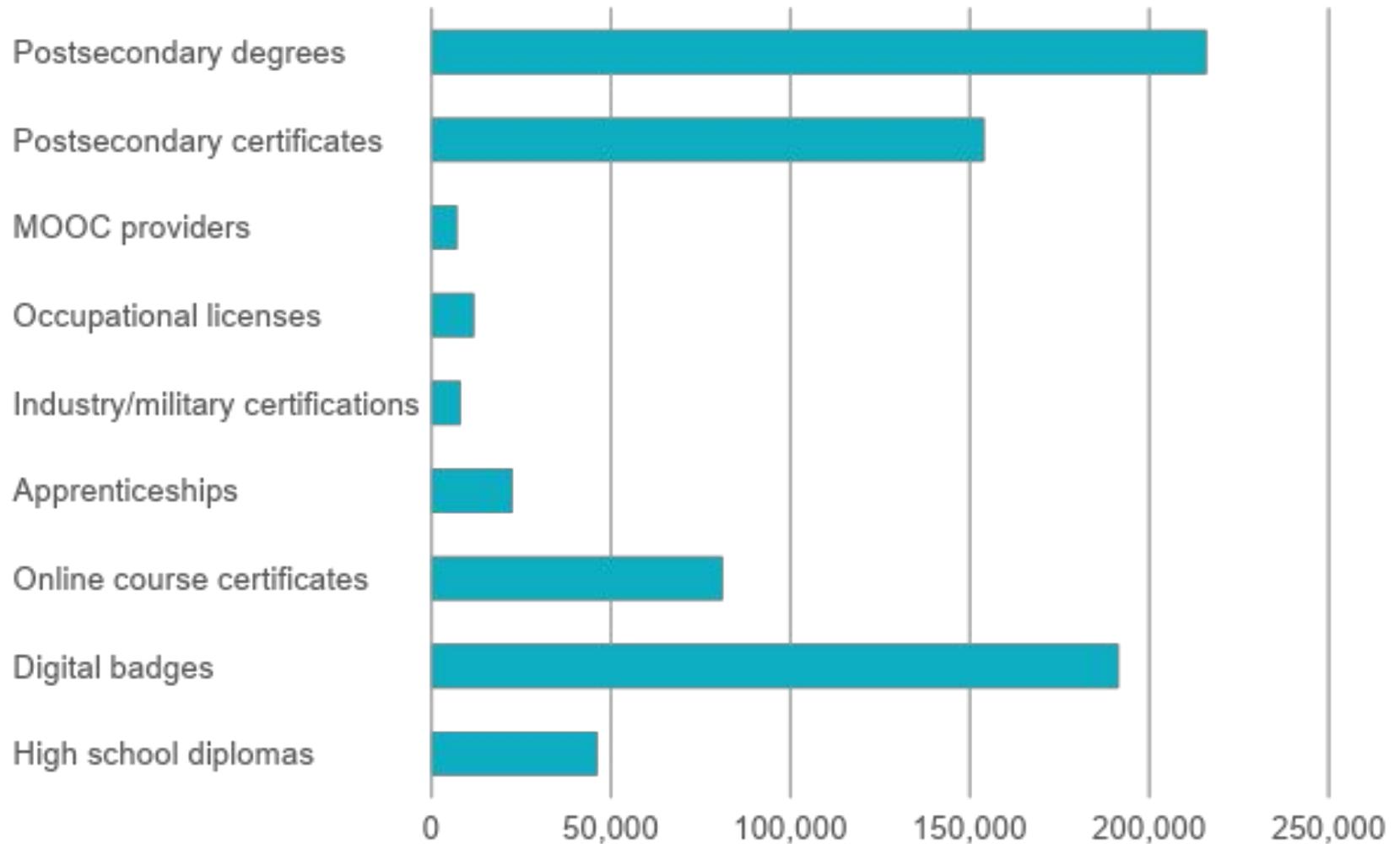
Jumpstart your career or continue to advance your skills in your chosen career. Wherever you are, community colleges offer a place to take the next step.

Explore career options and take the next step on your career pathway at one of Oregon's 17 community colleges.



Scale practices that document and certify skills

Count of U.S. Credential Programs



Source: The Credential Engine

Scale practices that document and certify skills



Expand apprenticeships

Takeaways

Oregon talent has supported one of the better job recoveries during this expansion, and productivity gains look good.

But the view of executives on talent is decidedly mixed—some satisfaction at the high-end and strong concerns elsewhere.

One clear competitive advantage: we expect talent to continue to move here.

Job quality could be a bigger concern than job quantity given the aging of the workforce.

40-40-20 is the most ambitious postsecondary goal in the United States, and trends in technology justify it.

The highest-in-the-nation-goal has driven innovation in the “middle 40”. Oregon appears to be ahead in the postsecondary redesign game. Staying on the frontier of postsecondary design work is an imperative.

The changing geography of work has reduced opportunities for non-college graduates in metro areas and leaves Oregon's smaller cities and towns as the best alternatives for some workers.

That puts more pressure on economic developers, policymakers, and business leaders—especially in the service sector—to create good jobs across the state.

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