



The Link for Local Employment

The Cape & Islands Regional Workforce Blueprint



I. Introduction

Regional Planning Team.

Cape and Islands Regional Planning Team	
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Meg Mayo Brown	Barnstable Public Schools
John Mann	NAGE
Andrew Vorce	Town of Nantucket
Annie Dolan Niles	Cape Cod Regional Technical High School

Regional Planning Process



Business Engagement..

The Team engaged members of the business community from many sectors, including banking/finance (two on the planning team and two more through outreach and engagement in WorkSmart), construction (two businesses) hospitality (three businesses), and retail (one business).

Business partners were and are engaged in three ways:

- 1) Through planning meetings of the Workforce Development Board and its committees, including but not limited to the Regional Planning meetings
- 2) Through targeted outreach on specific questions/issues related to the development of the regional plan
- 3) Through regular communications from the Workforce Development Board, with follow up invited and supported.

II. Where are we now? Describe the current state of your region, including an analysis of industries, occupations, demographic shifts, and gaps between employer demand and employee supply.

The total population of the Cape and Islands region has held somewhat steady between 2001-2016, a figure that is not expected to change in the coming five years. What's more significant are the changes that have occurred within subsets of the total population. Between 2001 and 2016 the Cape and Islands region saw demographic shifts that have major implications for the workforce. Most evident is the increase in the number of individuals who are at or approaching retirement age. Although the percentage of people ages 20-29 has increased, the region has seen a dip in key workforce age brackets (people age 30-54) and an increase in the number of people from ages 55-69.¹ Similarly, the number of millennials in the region is lower than that for comparably sized areas.² This increase in the aging population means that large swaths of the workforce are or will be retiring, and although this is a challenge across much of the US, the dearth of millennials in this region will compound the effects of that workforce shortage. The aging population of the Region is a primary concern for the Cape and the Islands, and ensuring an economy for young professionals is a priority that ties into many of the region's goals.

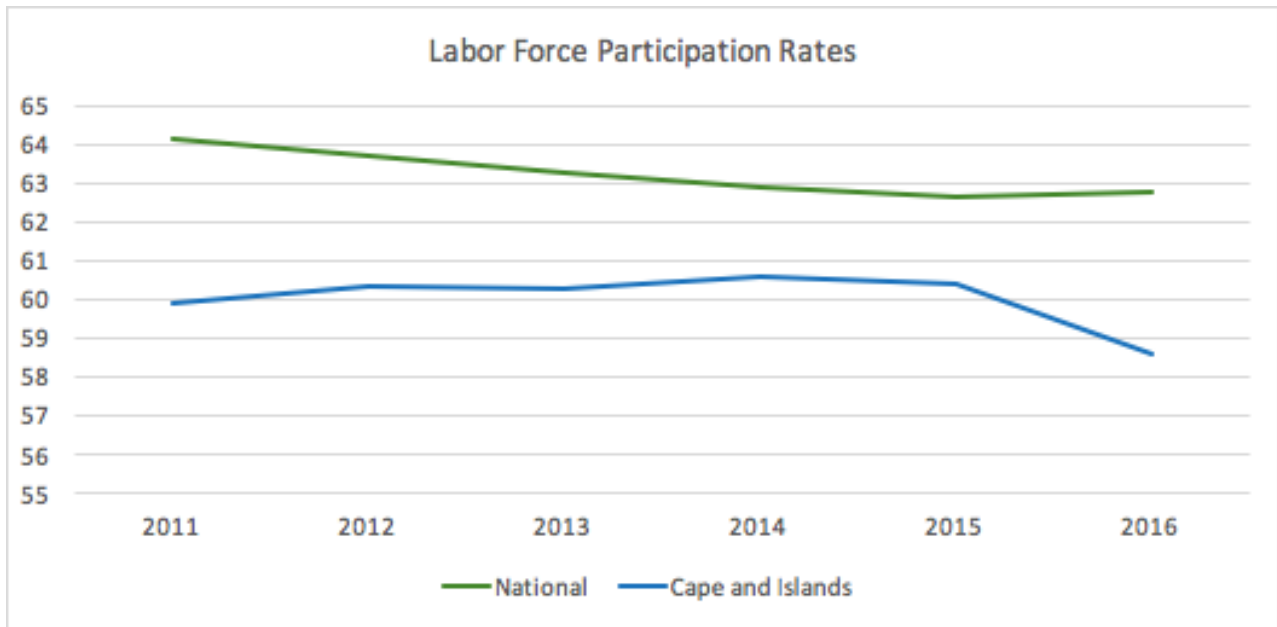
Regionally, the unemployment rate has decreased between 2011-2016 at a rate that is comparable with national figures³ however labor force participation rates have often

¹ Population Demographics Snapshot Report, October 2017

² Emsi Economy Overview, Q3 2017 Data Set

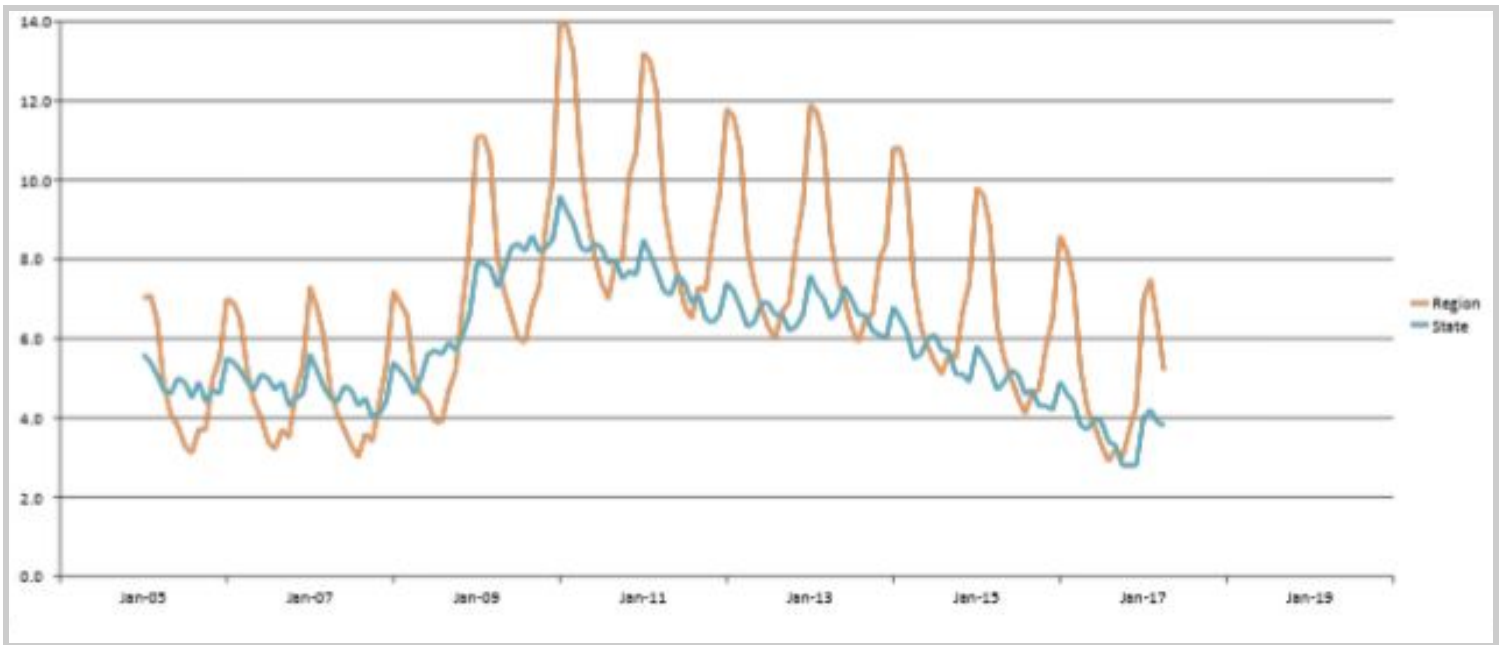
³ [Bureau of Labor Statistics](#)

diverged from national trends, indicating that there may be pockets of discouraged workers in the region.

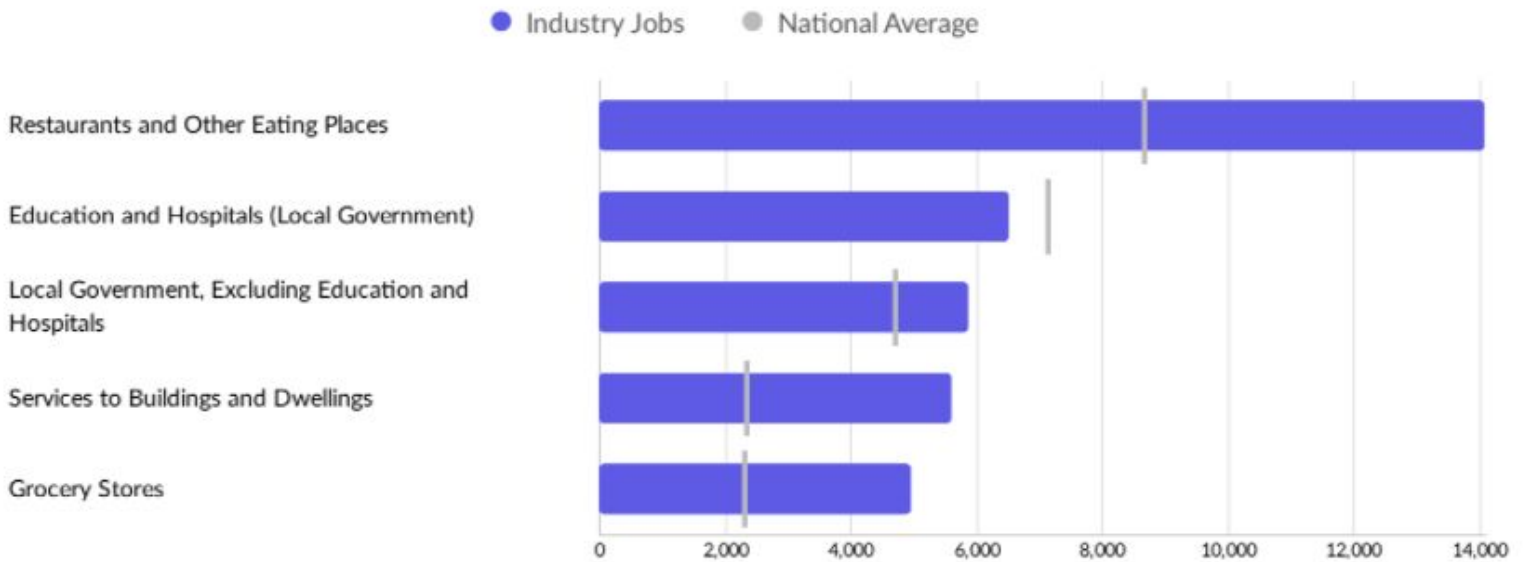


The Region has also seen a small shift in the racial and ethnic diversity of the region, with significant upticks in the number of individuals who identify as Hispanic.

One of the more notable characteristics of the region's workforce is the seasonality of unemployment trends, which follow the broad pattern of the state but season-to-season dip below or soar above state figures:



The region's largest industries are as follows:



Three of these industries (Restaurants and Other Eating Places, Services to Buildings and Dwellings, and Grocery Stores) experienced double-digit growth (13%-59%) between

2011-2016⁴. The other two highest growth industries are Other Amusement and Recreational Industries, and Individual and Family Services.

The top growing occupations in the region are well-aligned with sector growth:

Occupation	Increase
Landscaping and Groundskeeping Workers	18%
Waiters and Waitresses	10%
Construction Laborers	23%
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	24%
Combined Food Preparation and Serving Workers, Including Fast Food	16%

In addition to these overall growing occupations and sectors, the region has invested resources in understanding and cultivating the emerging Blue Economy - businesses that are directly dependent on the water (dark blue economy), and businesses that are likely located in the region because of the water (but are not directly dependent) (medium blue economy). Globally, Blue Economy strategies have been embraced and supported economic success for communities with similar proximity and dependence on bodies of water. The Blue Economy accounts for 12% of jobs and 11% of gross revenues in the region, and the dark blue economy is projected to grow through 2022:

- 4.3% in the Cape and Islands Workforce Investment Board region
- 16.3% in Dukes County
- 12.7% in Nantucket County

The Blue Economy strategy dovetails with the Cape and Islands' broader workforce development efforts, as is detailed later in this document.

⁴ Emsi Economy Overview

Regional Challenges and Opportunities

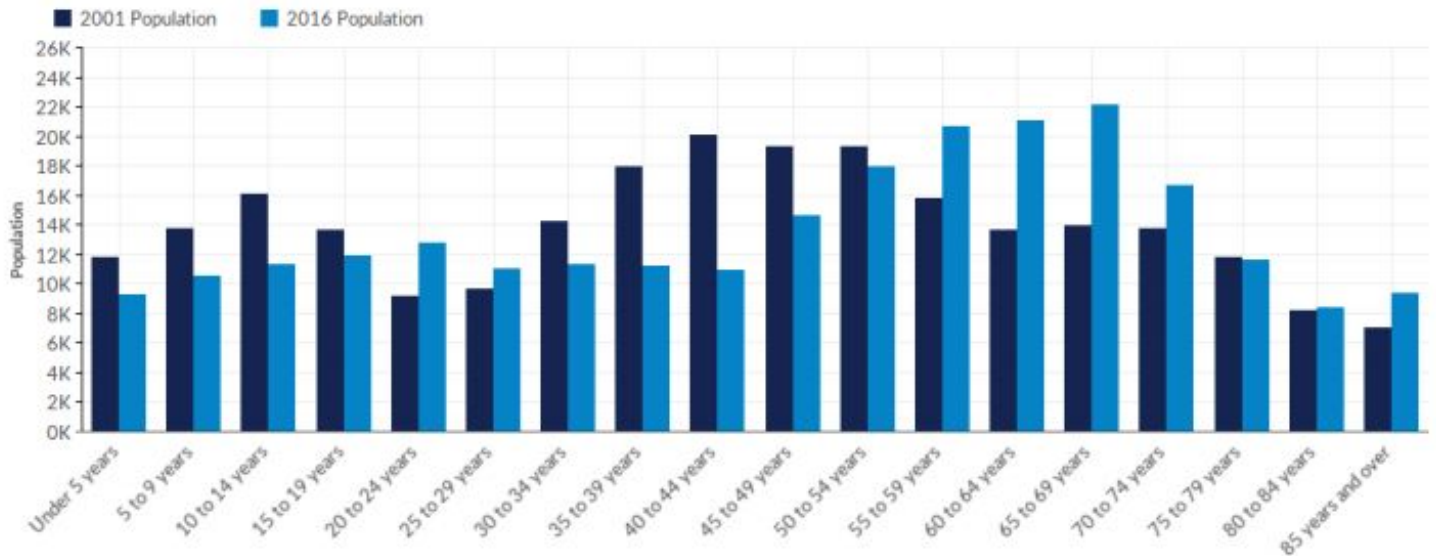


Housing stock, water and related infrastructure, and the state of the current workforce all present interrelated challenges.

- Our young people want to stay or come back to the Cape. Additionally, workers from other regions might move here -- if we had more - and more affordable -- housing. Also, our current supply of housing is increasingly occupied by year-round residents, significantly reducing the availability of seasonal housing options for our increasing seasonal workforce.
- We can't build more housing until we manage to expand our regional capacity for wastewater treatment.
- The workforce shortages experienced by our priority industries cannot be addressed in isolation. Our priority industries have many vacancies at entry level and lower wage positions; positions which could be filled if those workers could be housed in the region.

Finally, as indicated above, the number of people retiring soon is disproportionately high, and this is compounded by disproportionately low number of people ages 20-34). Regional labor force participation rate increased between 2011-2016 but is still below state (65.8%) and national (63.1%) averages.

Population by age cohort:



Industry Demand Analysis

The challenges of the Cape and Islands Region are directly tied to the industries that will support its economic success. The economic success of the region is dependent on improvements in infrastructure and basic services, along with bolstering an already thriving tourism industry, and creating career pathways within the Blue Economy.

The industries that are most vital to the region's economic success are as follows:

- **Hospitality**, a core element of the region's economy.
- **Healthcare** a basic need for any economy, specifically responds to our region's aging population; seasonal stability.
- **Services to buildings and dwellings**
- **Water, Sewage, and Other Systems** ties into the need for improved infrastructure to ensure that the workforce can expand, and offers many opportunities for individuals without post-secondary education.

There is some overlap in the vital industries, and those that are experiencing significant workforce development challenges:

- **Hospitality** seasonality creates challenges for workforce
- **Healthcare and Social Assistance** face significant supply gaps in multiple education requirements
- **Education** has a proliferation of part-time opportunities and faces supply gaps in sub-Bachelors degree occupations.

Occupational Demand Analysis

The most significant employee shortages in the region occur in the following occupational clusters and specific occupations:

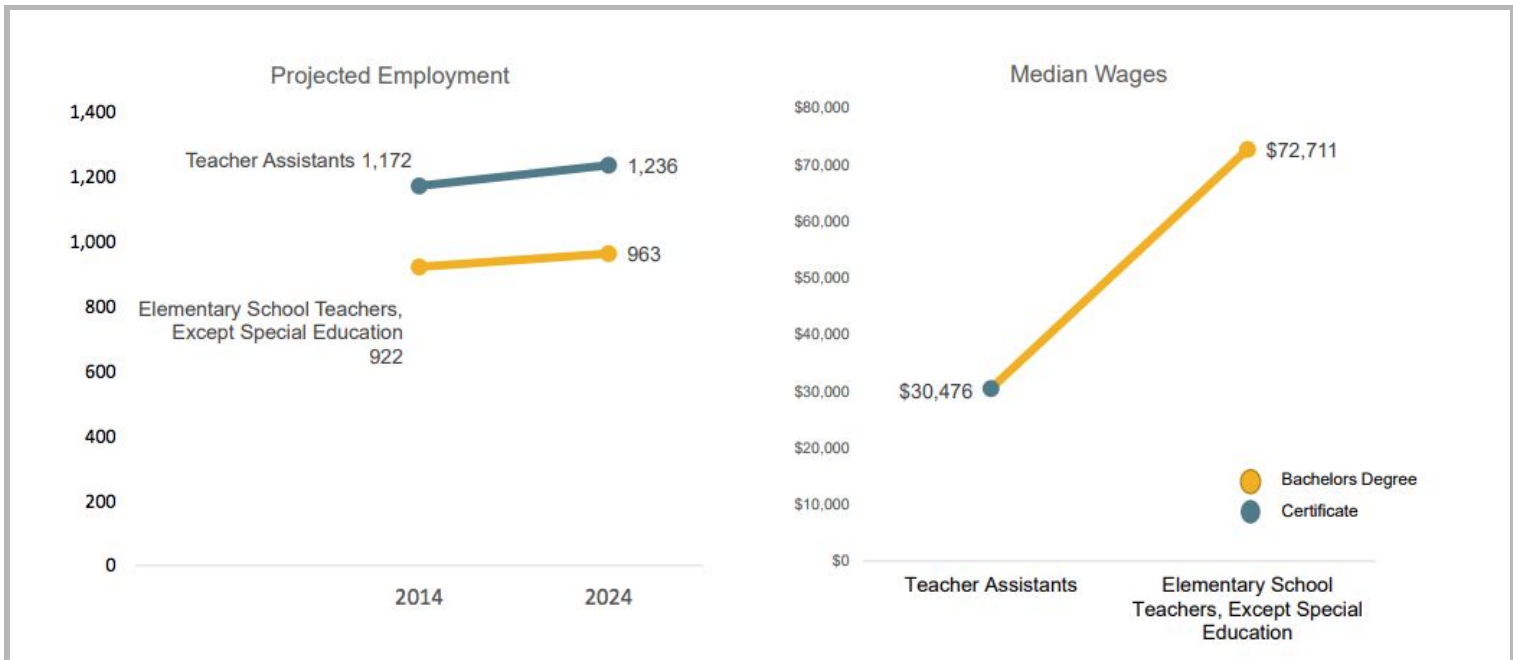
- **Food Preparation and Serving Related Occupations**
 - Including: Waiters and Waitresses; Cooks, Restaurant; Food Preparation Workers; Bartenders; Counter Attendants, Cafeteria, Food Concession, and Coffee Shop; Chefs and Head Cooks
 - Annualized HWOL range of 84 - 600; wages are lower than regional average
- **Building and Grounds Cleaning and Maintenance**
 - Including: Landscaping and Groundskeeping; Janitors and Cleaners; First Line Supervisors of Landscaping, Lawn, and Groundskeeping Workers
 - Annualized HWOL range of 84 - 684; wages are often lower than regional average
- **Personal Care and Service Occupations in the Health Care sector**
 - Including: Childcare Workers; Personal Care Aides; Recreation Workers
 - Annualized HWOL range of 36 - 336; wages are often lower than regional average
- **Office and Administrative Support Occupations in the Health Care sector**
 - Including: Office Clerks; Medical Secretaries; Receptionists and Information Clerks
 - Annualized HWOL range of 132 - 204; wages are often lower than regional average

- **Education, Training, and Library Occupations**

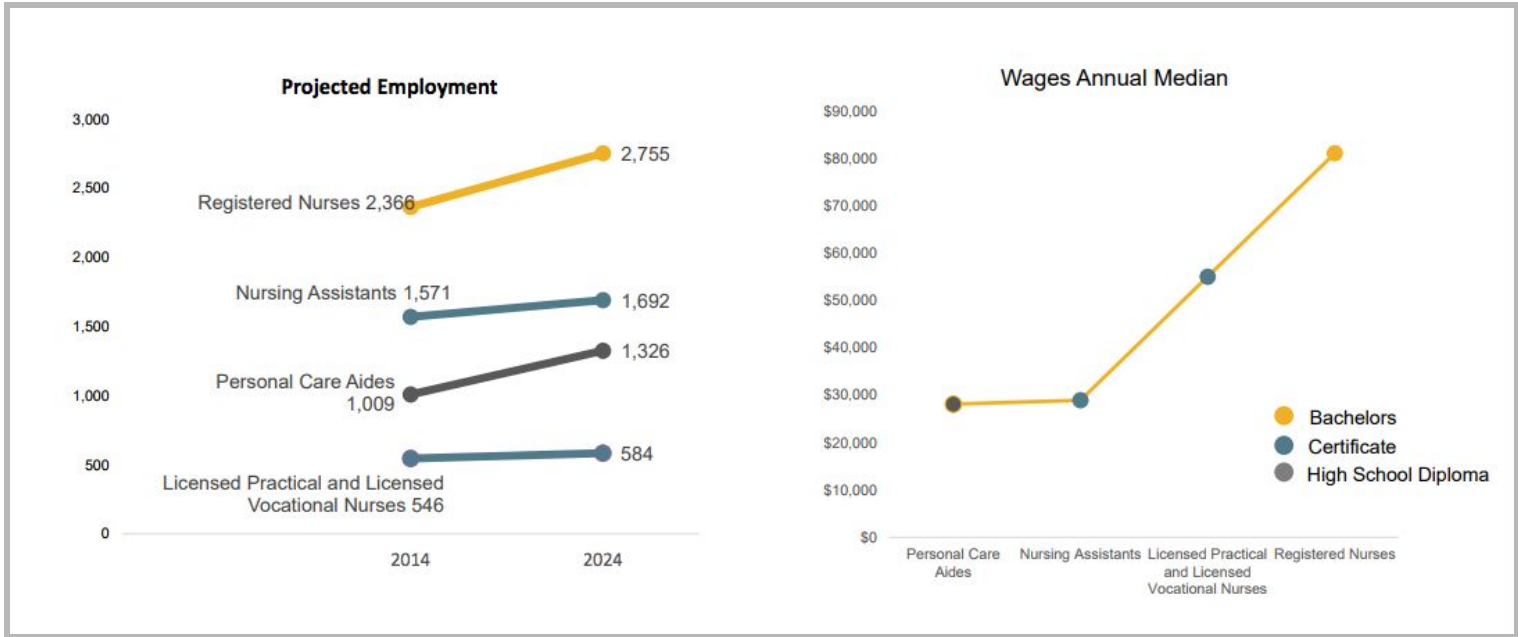
- Including Teachers (multiple occupations)
- Wages range from \$20,000 below to \$20,000 above regional average

The economy and needs of the region create a landscape for the following occupation-based career pathways:

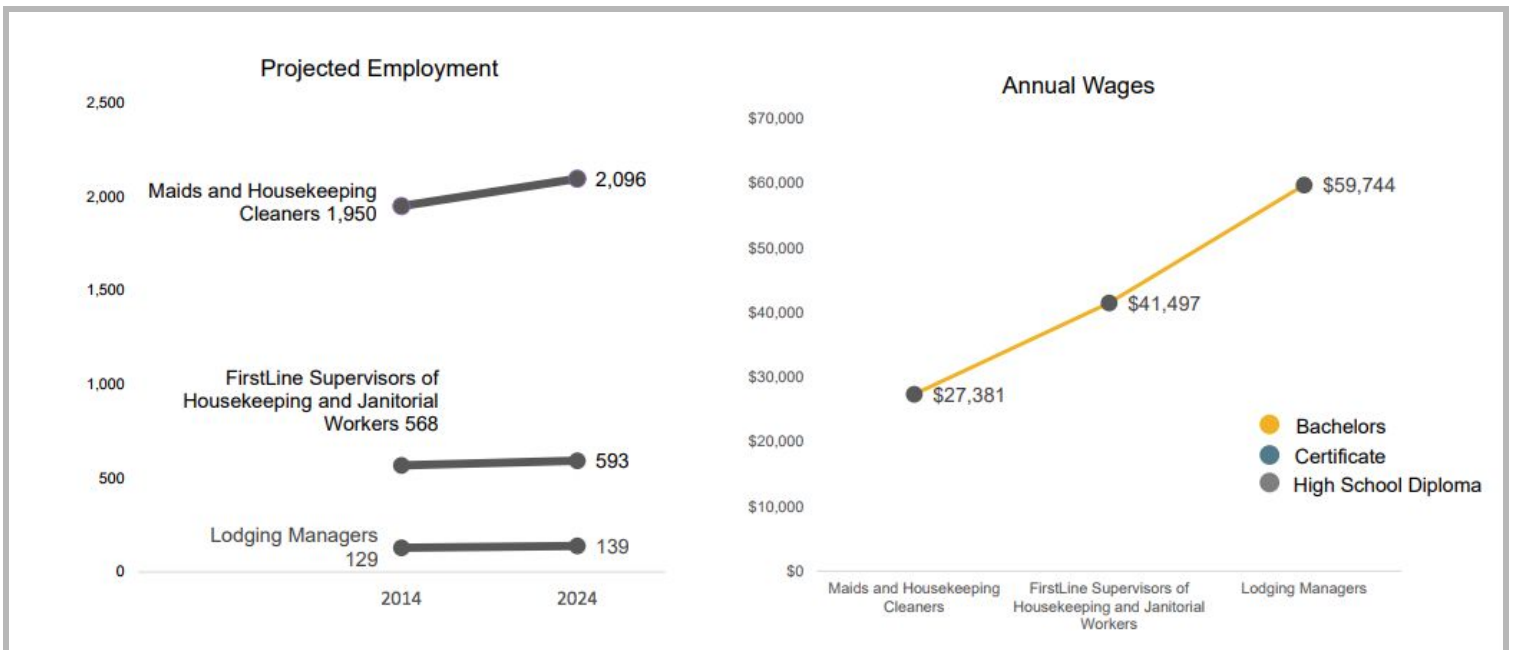
Education Pathways:



Nursing Pathways:



Hotel Career Pathways



Workforce Supply: Labor Supply Challenges and Opportunities

Across the region, our labor supply is challenged by populations shifts, specifically the impending mass retirement of older workers coupled with a lack of younger workers to replace them. Our workforce faces the additional challenge of not having room to grow due to lack of housing stock and wastewater treatment infrastructure. For this reason, as detailed later in this document, our strategy incorporates bolstering these basic needs.

The region has a labor supply opportunity seen in shifts in the education pipeline in the region, with a 3% increase in graduates from certificate, associates, bachelors and post-bachelors programs. The largest proportion of these graduates have obtained Liberal Arts/Science, Naval Architecture and Marine Engineering, and Registered Nursing programs - the latter two of which are well aligned with our priority industries and Blue Economy strategy.

The largest supply of unemployed workers fall into the Management Occupations cluster, including occupations managing sale, finances, health services, and construction, to name a few. Nearly all of these occupation clusters require a bachelor degree, with a few requiring master's or higher. The ultimate characterization for all of these occupations is that they are over supply. The second largest supply of unemployed workers is in the Education, Training, and Library Occupations cluster, and represents Elementary, Middle, and Secondary School Teachers - all of which require a Bachelor's Degree. Expanding the criteria for unemployment claims sheds similar light on the characteristics of unemployed individuals: this group is largely made up of individuals with Bachelor's degrees or higher.

Secondary schools

- Upper Cape Cod Regional Technical High School
 - Offering programs in Horticulture and Landscape Contracting, Culinary Arts, Health Technology, Marine Technology
- Cape Cod Regional Technical School
 - Offering programming in Carpentry, Culinary Arts, Dental Assisting, Engineering, Health Technology, Horticulture, HVAC, Marine Services

Post-Secondary institutions

- Cape Cod Community College
 - Offering Certificates in Administrative Assistance, Medical Coding, Billing, and Reception, Customer Service, Construction Management and Technology, Environmental Technology (various), Health Sciences (various), Horticulture
 - Offering Associates Degrees in Administration, Business Administration, Education, Environmental Technology, Health Sciences, STEM fields
- Massachusetts Maritime Academy
 - Offering Bachelors and Masters of Science in Facilities Engineering, Marine Engineering, Marine Safety & Environmental Protection, Marine Transportation
- National Graduate School of Quality Management
 - Offering Bachelors and Masters of Science in Quality Systems Management, and Doctor of Business Administration

III. Where do we want to go?

STATE CRITERIA	REGIONAL CRITERIA
<ul style="list-style-type: none"> ➤ High employer demand ➤ High demand and high wage (4-5 Star Occupations) ➤ Talent Gaps (Ratio of Supply to Demand) ➤ Career Pathways 	<p>What additional criteria are important to your Regional Planning Team?</p> <ul style="list-style-type: none"> ➤ <i>“Good” employers, i.e. those that handle seasonality well and can make year-round jobs for our residents.</i> ➤ <i>Connected to the Blue Economy; both the needs of those employers and the needs of the industries that serve them.</i>

Priority Industries and Occupations

The Cape and Islands region has prioritized three of its largest and growing industries:

- **Hospitality** (NAICS Sector 72: Accommodation and Food Services)
- **Healthcare** (NAICS Sector 62: Health Care and Social Assistance)
- **Services to Buildings and Dwellings** (NAICS Sector 56: Administrative and Support and Waste Management and Remediation Services)

The priority occupations are characterized by several factors: 1) they are among the top growing occupations in the region; 2) each supplies multiple industries that are important to the region; and 3) each has potential to support the Blue Economy, through our tourism and marine industries.

- **Landscaping and Groundskeeping Workers** (SOC 37-3011)
 - 18% growth between 2011 - 2016
 - 5 star demand
 - No formal educational credential
 - Supplies Administrative and Waste Services, and Arts Entertainment and Recreation industries
 - Opportunity to advance to supervisory position with high school diploma
- **Waiters and Waitresses** (SOC 35-3030)
 - 10% growth
 - No formal educational requirement
 - 5 star demand
 - Supplies Accommodation and Food Services, and Health Care and Social Assistance industries)
- **Construction Laborers** (SOC 47-2060)
 - 23% growth
 - Entry level position with no formal educational requirement but offers opportunities for career advancement
 - 5 star demand
 - Supplies Construction, and Public Administration industries
- **Janitors and Cleaners, Except Maids and Housekeeping Cleaners** (SOC 37-2011)
 - 24% growth
 - No formal educational credential

- 5 star demand
- Supplies Administrative and Waste Services, and Educational Services industries
- Opportunity to advance to supervisory position with high school diploma
- **Combined Food Preparation and Serving Workers, Including Fast Food** (SOC 35-3021)
 - 16% growth
 - No formal educational credential
 - 5 star demand
 - Supplies Accommodation and Food Services, and Retail Trade industries

Assets

Our priority occupations share the same set of assets and gaps. The assets include, low barrier to entry (no age requirement or necessary credentials), year-round positions, strong growth rate, and the opportunity for advancement. However, the gaps present significant hurdles when considering how one might make a living. Low wages and hours outside of the regular work day are off putting to job-seekers especially in combination with the high cost of living in the region and a lack of affordable housing.

Vision, Mission, Goals.

Our regional partners are committed to promoting a thriving, sustainable, and vibrant economy in the Cape & Islands region. There will be opportunity and infrastructure to support a diversity of sectors and people of all educational/income levels.

One of the important themes within the regional planning sessions was the shared commitment across multiple sectors and types of partners to economic diversity in the region. Rising housing costs pose a serious threat to such diversity, and the workforce and economic development expansions are limited by the absence of affordable housing. Development of more affordable housing is strictly constrained by our limited wastewater treatment capacity, as well as local zoning regulations. These issues emerged again and

again, and our vision statement is intended to highlight our shared commitment to addressing these systemic issues in service to both the overall quality of life in our region as well as the critical worker shortages faced by our business communities.

Mission: The Cape and Islands Workforce Development Board Regional Planning Team facilitates shared goal setting and strategic coordination of efforts for those working to ensure the continued health of the local economies of the Cape and Islands regions.

Each of the three sectors (workforce development, economic development and education) has a unique role to play in advancing our shared goals and fulfilling our mission. This is the way that the regional actors have agreed to organize our work so that it remains complementary and synergistic.



WorkSmart Partnership Goals		
<p>By 2018, we will...</p> <ul style="list-style-type: none"> • Support initiatives to improve drinking water quality • support initiatives to improve regional housing options • advocate for growth in the blue economy • expand existing HVAC program at UTC by 20% • Implement 13th year program for non-college bound high school students at UTC 	<p>By 2020, we will...</p> <ul style="list-style-type: none"> • Increase blue economy employment by 25% over 2018 numbers • Increased diversity of regional industries • Increase participation in regional economy by local graduates • Reduce vacancies in priority industries 	<p>By 2022, we will...</p> <ul style="list-style-type: none"> • Increased socioeconomic diversity among full time residents • Increased attraction and retention of workforce participants by job opportunities and reasonable cost of living

IV. How do we get there? Describe the strategies you will jointly employ to align the work of multiple systems around your shared vision, mission, and goals.

Shared Strategies: While each system may make changes in individual programming to align with the region’s priorities, all systems will need to commit to shared changes in the following areas, stated below. Describe how your region will work collaboratively in the following two areas.

The Cape & Islands Strategy: Coordinate, organize, and collaboratively expand resources.

1. Continuous Communication. How often and in what way will you meet to review progress towards shared goals and make course corrections?

The WorkSmart Partnership is the working group established to support the strategy the planning team established. Their role is to progress the work laid out in this plan. As such, they are consistently working in and across the partnership as well as hosting quarterly convenings. The convenings' agenda has three main components:

1. The Quarterly Report

- a. Highlights & Accomplishments
- b. What went well & why
- c. What has changed in the past 3 months that we should consider?

2. Coordinating Existing Activity

- a. Visit each one of the goals and their strategies. What is currently being done and what are next steps?
- b. What will begin next quarter?
- c. Next time we meet what will we have accomplished?

3. Additional ideas and actions we should consider

- a. What efforts should we be involved with?
- b. What should we bring to the attention of the state?

2. Shared Measurement Systems. What data and measurement systems will you rely on to support shared understanding of how well you are meeting your goals and making progress towards a shared vision?

We will be working collaboratively to ensure that our data and our data systems serve our shared goals. For the current year, we are tracking data from the State and from our partner sources, specifically:

- A. Leading indicators of the availability of a prepared workforce:
 - Enrollment, graduation, and employment by education/training program
 - Business utilization rates for the Career Center
 - Career Center/WIOA partner performance data (number of businesses served, job orders, job referrals, and hiring)

- B. Lagging indicators of meeting employer demand for workers:
- Employer vacancy rate by industry
 - Supply/demand ratio

Additionally, we know that there are systems which will support the expansion of the supply of affordable housing, which is absolutely critical to our success. In this area, we are jointly tracking:

- A. Leading indicators of the increased availability of affordable housing:
- Meetings and other outreach to municipal officials regarding zoning relief
 - Continued support and fundraising for wastewater treatment facilities
 - Exploration among partners of innovative solutions (e.g. using Mass Maritime dormitories for seasonal worker housing, co-investment among partners in supporting new development projects)
- B. Lagging indicators of sufficient stock of affordable housing:
- Reports from employer partners about the challenges facing their workers
 - Average housing prices
 - Percent of income spent on housing for low-wage workers

Other Shared Strategies

With the launch of the WorkSmart Partnership (successor to the Regional Planning Team), the regions actors in the areas impacted by this plan have agreed to the following three strategies to advance their shared goals:

- Continued and expanded coordination of existing activity by each partner (share resources and info)
- Identifying ideas which are successful and replicable and sharing them with partners across the state; seeking to join other planning teams in advancing them together (especially within areas requiring or improving with state policy changes)

- Collaboration on fundraising proposals, specifically for a) training initiatives, b) wastewater treatment facility developments and c) affordable housing supply expansion initiatives.

Mutually Reinforcing Activities:

1. Education. Describe the changes in programming, recruitment, retention and placement strategies, assessment, tracking, or other strategies specific educational partners have committed to in order to meet shared regional goals.

Our education partners are focused on building nimble systems to provide fast and relevant preparation, informed by employer demand in priority industries. They will do this through the establishment and growth of training programs and partnerships with local businesses. This dual prong strategy of growing programs, like HVAC and Nursing & Allied Health at UCT, and establishing new learning opportunities, like implementing a 13th year program for high school graduates seeking a learning experience that will connect them to a job, reflect the ability of our region to make meaningful change and long-term impact using our existing resources.

2. Workforce Development. Describe the changes in programming, employer relations, recruitment, retention and placement strategies tracking, or other strategies specific workforce development partners have committed to in order to meet shared regional goals.

Our Workforce Development partners will coordinate the mutually reinforcing activities happening in the region; providing direct training programs, and supporting collaborative fundraising to initiate new credentialing programs. They are the link between our education and economic development partners.

3. Economic Development. Describe the changes in economic development strategy that economic development partners have committed to in order to meet shared regional goals.

The responsibility of our Economic Development partners is to ensure that business growth, for all businesses, is supported by the availability of needed additional supports. They will make sure that the conditions surrounding employment, such as sustainable and affordable housing, are in place.

V. Conclusion

A key component of our success as a region is to insert ourselves in conversations regarding development and education in this region with a workforce development lens. For instance, we will be key players in the development of solutions to our waste water issues. These solutions will allow us to solve other problems such as the lack of affordable housing on the cape and islands, which will attract a more diverse and long-term workforce. Luckily, we are in a position to leverage interest and investment in the blue economy to forward the conversation on water quality and housing.