

San Joaquin Valley & Associated Counties Regional Planning Unit

REGIONAL PLAN



2025 - 2028

 Doris Foster, Director

 sjvac@stanworkforce.com


 (209) 558-2100

TABLE OF CONTENTS

		PAGE
I.	INTRODUCTION AND OVERVIEW	3
	A. Workforce Innovation and Opportunity Act	3
	B. Regional Plans and the WIOA Planning Structure	3
	C. California's Strategic Workforce Priorities	4
	D. Overview of the SJVAC RPU and the Region	5
	E. Guiding Principles	6
	F. Approach to and Context for Plan Development	6
	G. Program Year 2025-28 Regional System Priorities	7
II.	ANALYTICAL OVERVIEW OF THE REGION	9
	A. Analysis of Employment and Unemployment Data	10
	B. Analysis of the Educational and Skill Levels of the Workforce, the Current Needs of Employers in the Region, and Relevant Skill Gaps	14
	C. Analysis of Industries and Occupations with Existing and Emerging Demand	18
III.	REGIONAL INDICATORS	26
	A. Regional Indicators and Associated Metrics	26
	B. Impact of Indicators and Metrics on Service Delivery	28
IV.	FOSTERING DEMAND-DRIVEN SKILLS ATTAINMENT	29
	A. In-Demand Industry Sectors for the Region	29
	B. Sector and other Industry-Focused Initiatives	30
	C. Strategies to Communicate with Regional Employers	37
V.	ENABLING UPWARD MOBILITY FOR ALL CALIFORNIANS	39
	A. Working with Businesses that Provide Quality Jobs	39
	B. Shared Target Populations and Targeted Service Strategies	41
VI.	CLIMATE AND ENVIRONMENTAL SUSTAINABILITY	42
	Utilizing the California Jobs First Initiative as a Launchpad for Climate-Focused Workforce Development	44
VII.	ACCESS AND ECONOMIC JUSTICE	47
	Strategies to Achieve Full Access to Services	47
VIII.	ALIGNING, COORDINATING, AND INTEGRATING PROGRAMS AND SERVICES	48
	A. Regional Service Strategies	48
	B. Regional Administrative Cost Arrangements	50
IX.	PROGRAM YEAR 25-28 REGIONAL SYSTEM PRIORITIES	51
X.	ATTACHMENTS	55
	A. Stakeholder and Community Engagement Summary (Attachment 1)	56
	B. Public Comments that disagree with the Regional Plan (Attachment 2)	58
	C. Signature Page (Attachment 3)	59

I. INTRODUCTION AND OVERVIEW

With the passage of the Workforce Innovation and Opportunity Act (WIOA) of 2014, Congress moved the national workforce system in a new direction in terms of how to approach economic and labor market demands. While establishment of local workforce areas over the last four decades has always taken into account local labor markets, WIOA recognizes that economies tend to be regional, spilling easily over jurisdictional boundaries that commerce finds inconsequential. WIOA's recognition of regional economies gave rise to California's establishment of Regional Planning Units (RPUs), which represent groups of local workforce areas that work collaboratively to develop strategies reflecting regional economic needs of business and the workforce. In accordance with federal and state guidance, the San Joaquin Valley and Associated Counties (SJVAC) RPU has developed this four-year Regional Plan to guide strategic initiatives throughout Program Years (PY) 2025-28, which covers July 1, 2025 through June 30, 2029.

A. Workforce Innovation and Opportunity Act

Passed by Congress with a wide bipartisan majority, WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in a global economy. WIOA represents the most recent version of federal workforce legislation providing funding to states and local areas to administer and operate workforce development programs. WIOA was preceded by the Job Training Partnership Act (active from 1982 to 2000) and the Workforce Investment Act (active from 2000 to 2015).

WIOA requires that a workforce development board (WDB) be established in each local workforce development area (LWDA). The area's chief local elected officials appoint members to the WDB. Local workforce development boards are business-led and the majority of members must come from the business community. Required WDB members also include representatives from labor, education, economic development, and specific federally funded workforce programs. The chief local elected officials may also select representatives from other groups, such community-based organizations, to sit on the WDB.

While the PY 2025-28 Regional Plan addresses the programs, services, and activities of many organizations that derive their primary funding from a wide range of federal, state, and private programs, it is WIOA that requires the development and publication of the Plan and that prescribes its core content.

B. Regional Plans and the WIOA Planning Structure

The SJVAC RPU Regional Plan is best understood within the context of a three-tiered planning structure envisioned by WIOA that requires development of plans at the state, regional, and local levels.

State Plans: Under WIOA, state plans communicate the vision for the statewide workforce development system. WIOA planning requirements aim to foster effective alignment of federal investments across job training and education programs, in order to coordinate service delivery among programs for shared customers; improve efficiency; and ensure that the workforce system connects individuals with high-quality job opportunities and employers. Cross-program planning promotes a shared understanding of the workforce needs within each state. California's PY 2024-2027 Unified Strategic Workforce Development Plan represents agreement among the WIOA core program and other partners and serves as the framework for the development of public policy, fiscal investment, and operation of the state workforce and education systems.

Regional Plans: In states such as California, where Governors have established workforce planning regions encompassing one or more LWDAs, regional plans are required. Local WDBs within the region participate in a planning process that describes elements such as: analysis of regional labor market data, development and implementation of sector initiatives for targeted industries and in-demand occupations; coordination of workforce services with regional economic development services and providers; and establishment of regional service strategies, including use of cooperative service delivery agreements. The SJVAC RPU is one of California's fifteen workforce regions.

Local Plans: The local plan is intended to serve as a four-year action plan to develop, align, and integrate the local area's job-driven workforce development systems and provide a platform to achieve the local area's vision and strategic and operational goals. Features of the local plan include: coordination among economic development, education, and workforce partners to build a skilled workforce through innovation in, and alignment of, employment, training and education programs; implementation of job-driven strategies and services through the local career center system; and delivery of education and training to ensure that individuals, including youth and individuals with barriers to employment, have skills necessary to compete in the job market and that employers have a ready supply of skilled workers.

WIOA requires that Local Plans be incorporated into the Regional Plan. Therefore, the PY 2025-28 SJVAC RPU Regional Plan includes the PY 2025-28 Local Plans developed by the region's eight local WDBs.

C. California's Strategic Workforce Priorities

California's Unified Strategic Workforce Development Plan describes the state's priorities for the public workforce system. Under the leadership of the Governor and the Secretary of the Labor and Workforce Development Agency, California's vision for the future of workforce development is centered on the establishment and growth of a workforce system that promotes opportunity, job quality, and environmental sustainability for all Californians. The state is committed to developing a workforce system that enables economic growth and shared prosperity for employers and employees, especially those

with barriers to employment, by investing in industry partnerships, job quality, and meaningful skills attainment. One area in which the California Workforce Development Board (CWDB) pursues these aims is through its “High Road” programming. High Road refers to a “family of strategies” for achieving a participatory economy and society by aligning workforce, economic policy, and different interests with long-term goals of environmental sustainability, high-quality jobs, and a resilient economy. High Road emphasizes the complementary nature of these aims over the long term. In practice, High Road policy builds upon areas where the interest of employers (in trained and productive workers), workers and jobseekers (in good quality and accessible jobs), and environmental protection (for a sustainable future for all) overlap to create pathways to high-quality jobs while raising the profile of existing ones.

In consideration of the practical implementation of High Road principles in workforce development policy, the CWDB describes in the current State Plan four distinct “flavors” or styles of intervention. These interventions are directly relevant to High Road projects but also inform, to a greater or lesser extent, all of CWDB’s workforce efforts. They include: (1) lifting all workers to the “High Road;” (2) professionalizing precarious work (i.e., employment that is temporary, non-standard, and insecure, often with poor pay and no protection); (3) democratizing access to high-quality, middle-skill jobs; and (4) participatory planning for a low-carbon economy.

In accordance with the requirements of WIOA, both the SJVAC RPU Regional Plan Local Plan and the eight associated Local Plans support the State Plan priorities by:

- Maintaining a dual focus on providing programs and services that meet the needs and support the goals of businesses and job seekers/workers.
- Concentrating on industry sectors which drive growth and prosperity within local labor markets and regional economies.
- Targeting jobs that offer career advancement opportunities and that lead to positions that pay family-sustaining wages and provide pathways to self-sufficiency and the middle class.
- Committing to the adoption and implementation of strategies and processes that support environmental sustainability and climate resilience through workforce development.

D. Overview of the SJVAC RPU and the Region

The parties to the Regional Plan are the eight local workforce development boards within the RPU, which include seven boards representing single counties (Fresno, Kings, Madera, Merced, San Joaquin, Stanislaus, and Tulare) and one consortium board representing three counties (Kern, Inyo and Mono). Through their Central California Workforce Collaborative (CCWC) network, the WBDs were all actively involved in the regional planning process by reviewing State guidance; engaging external expertise to assist in the process; providing resource documents; organizing regional forums; and meeting as a group to share insights, make decisions, and establish priorities for regional

coordination. As the designated lead for the RPU, development of the PY 2025-28 Regional Plan was managed by the Stanislaus County WDB.

The boundaries of the RPU are those defined by the ten counties referred to above. The area comprises approximately 40,760 square miles, roughly 25% of California. With approximately 4.3 million residents, the region is more populous than 25 states.

E. Guiding Principles

In addition to support for the State Plan, the SJVAC RPU Regional Plan is built upon five principles, which represent the values, vision, and commitment of the Central Valley's workforce stakeholders. They include:

The Workforce System is Demand-Driven: Industry drives job demand and businesses define skills needed for jobs. It is the obligation of the workforce system to train candidates in these skills, preparing them for careers.

Regional Sector Pathways are an Effective Approach to Meeting Demand: Structured, high-quality education, training, and support programs offer opportunities for success for everyone who is preparing for a career.

The Workforce System Encompasses All Stakeholders: The system is not merely WIOA programs. Rather, it is comprised of the work, resources, and unique capabilities of all organizations and individuals with a stake in building and maintaining a prosperous, competitive economy.

Long-Term Regional Collaboration: The Central California Workforce Collaborative (CCWC) is a manifestation of a partnership that has existed for 40 years. Through the joint efforts of the eight WDBs, this collaboration has yielded many benefits.

Climate Resilience and Environmental Sustainability Are Critical to the Regional Economy: Every occupation and industry is affected by climate change and/or influences the environment to varying degrees. As California moves toward a carbon-neutral economy, entire industries are changing, along with the jobs, knowledge, and skills needed within those sectors.

F. Approach to and Context for Plan Development

To support development of the PY 2025-28 Plan, the region contracted with experienced workforce and economic development subject matter experts to design the stakeholder engagement process, analyze labor market and workforce data, facilitate community forums, and craft the language of the plan. Local board directors, managers, and staff were active during every stage of the plan development. The content of the Plan contemplates myriad opportunities and challenges that are expected to persist over its four-year span. Among these are:

Potential Challenges

An Aging Workforce: A large number of baby boomers and even later generations are retiring, creating a potential gap in experienced workers.

Skill Shortages Resulting from Automation: Rapid technological advancements, including artificial intelligence and robotics, may render certain skills obsolete, requiring significant workforce upskilling.

Attracting and Retaining Talent: Competition for skilled workers is expected to intensify, making it challenging to attract and retain talent.

A Multigenerational Workforce: Managing diverse generations with different expectations and work styles within the same workplace.

Work-Life Balance and Flexibility: Balancing employee demands for flexible work arrangements with the need for productivity and performance.

Funding for the Workforce System: Managing costs that continue to rise and the increasingly complex needs of customers, while funding for the system has not kept pace.

Key Opportunities

Leveraging artificial intelligence in recruitment: Utilizing these tools to analyze candidate data and efficiently identify talent matches.

Upskilling and reskilling initiatives: Investing in training programs to equip current employees with the skills needed for emerging technologies.

Focus on employee experience: Prioritizing employee well-being, engagement, and career development to improve retention.

Remote work and hybrid models: Offering flexible work arrangements to cater to diverse employee needs.

Data-driven decision making: Utilizing data analytics to inform workforce strategies and talent management.

Building a learning culture: Encouraging continuous learning and adaptability to keep pace with technological advancement.

G. Program Year 2025-28 Regional System Priorities

During the process used to develop the PY 2025-28 Regional Plan, business and industry leaders, community members, regional stakeholders, and system partners were invited to participate in a series of discussions regarding the direction of the local workforce system over the next four years. As a result of these discussions, the following priorities have been identified:

- Focus on key industries
- Support businesses in managing change
- Engage businesses in the design and delivery of training
- Address climate impacts on economy and work
- Identify and train the workforce in core employability skills
- Prepare youth and young adults for careers
- Recognize changes in worker priorities
- Leverage under-resourced workers
- Bring services to communities
- Expand collaboration

Section IX of this plan summarizes these and other regional issues, strategies, approaches, and key considerations that workforce system leadership and system partners will examine over the four-year course of this plan.

II. ANALYTICAL OVERVIEW OF THE REGION

The Regional Plan for the Central Valley provides an overview of the region's economy and workforce environment and describes collaborative strategies across the eight local workforce development areas. Leveraging a broad range of expertise and resources, the SJVAC RPU has completed an analysis of labor market data, as well as economic conditions and trends in the region, and analysis of the educational attainment of the current workforce.

As the lead organization for the SJVAC RPU, Stanislaus County WDB engaged the Tulare County WIB to complete data analysis required for the Plan. In January 2025, Tulare County published the results of this analysis in a report titled "[San Joaquin Valley Regional Planning Unit: Data Analysis for Regional Plan PY 2025-28.](#)" The analysis is accessible in its entirety through the preceding hyperlink.

Data Analysis Methodology

The data presented by Tulare County WIB representatives (hereafter "the analysts") supports regional planning objectives linked to the labor market and workforce. The analysts used publicly available data from several federal agencies, including the Bureau of Labor Statistics, Bureau of Economic Analysis, and the Census Bureau, as well as from Lightcast, a private data analytics service that conducts additional analysis using public data sets, private sources, and proprietary data analytics.

Aside from Decennial Census data, which this report only contains embedded in survey benchmarks and other data smoothing methods, all data analysis is based on survey methods and derivations of those outputs. The main survey used is U.S. Census Bureau's American Community Survey (ACS). This is a yearly survey on a wide-reaching array of economic, social, demographic, and employment topics. Survey results are presented in 1-year estimates (ACS 1-year) and 5-year estimates (ACS 5-year). Generally, the report relies on ACS 2023 1-year data, as it presents the most current available data. In some instances ACS 5-year estimates are presented. ACS 5-year estimates cannot and should not be directly compared with ACS 1-year estimates.

In addition, the analysts make use of Industry and Occupational data that was prepared by the California Employment Development Department (EDD) for Unemployment and industry level analysis. These EDD reports also use a combination of the U.S. Department of Labor's Current Population Survey (CPS) and Current Employment Statistics (CES). EDD generally rounds figures to the nearest -100, and the estimates presented should not be interpreted as a census of workers.

Projections of employment or industry activity are derived using myriad methods. No single method, combination of methods, or algorithm can be used to predict the future. However major industry trends should be considered when devising workforce development strategies.

Lightcast shares its methodology publicly and it is available for review at no cost. A non-comprehensive list of resources is attached to the Regional Plan Data Analysis report for readers to use to further examine data.

Overview

Data analysis conducted to support the SJVAC RPU's PY 2025-28 Regional Plan serves as a critical tool to support workforce planning and strategic decision-making aimed at fostering economic growth and addressing workforce challenges within the region, including the development of career pathways linked to growth industries and other strategic and promising sectors. This comprehensive analysis of the region's labor market and economic trends will inform workforce development strategies for the coming years.

The report on which data in this section of the Plan is based highlights resilience in recovery from the pandemic, showcasing significant job growth and economic gains across key sectors and industries. Between 2019 and 2024, total nonfarm employment grew by 9.67%, with sectors like Educational and Health Services (+19.55%) and Trade, Transportation, and Utilities (+12.77%) leading this expansion. However, the region continues to see weakness relative to the rest of the state when it comes to high wage employment in sectors such as technology, media, and other higher end service and manufacturing jobs.

The San Joaquin Valley has taken advantage of its geographic endowments to support the emerging logistics and e-commerce economy. Affordable land and the central location of the region relative to the rest of the state have led to strong job growth in associated industries. These growth sectors are driven by increased consumer demand for healthcare and logistics services, positioning the Central Valley as a critical hub for e-commerce and community services. Conversely, traditional sectors like agriculture experienced job losses, with Crop Production declining by 7,531 jobs (-12%). This trend reflects broader challenges such as water scarcity, advancements in automation used in agriculture, and Sustainable Groundwater Management Act (SGMA) related water conservation, which all underscore the importance of adapting workforce strategies to these economic shifts.

Despite these advancements, challenges remain in addressing structural employment disparities and workforce skill gaps. The region is undereducated and earns less relative to the rest of the state. Addressing these educational and skill deficits is critical to unlocking the full potential of the region's workforce. By investing in targeted training programs and educational initiatives, the region can bridge these gaps, ensuring sustained economic growth and a more equitable labor market.

A. Analysis of Employment and Unemployment Data

Generally, unemployment rates in the counties that comprise the SJVAC RPU can be several percentage points higher than the statewide average. Much of this discrepancy is due to the high share of farm jobs relative to the rest of the economy, as well lower

skilled employment that can lead to lower perceived or real job security. Table 1 shows that the overall unemployment rate is higher than it was five years ago, but this does not necessarily reflect a weakening of the overall labor market which continues to show expansion. A larger share of the population entering the workforce and searching for jobs, as well as persons switching careers or positions looking for higher pay or better opportunities, can also explain this rise.

In comparison to the whole of California, the SJVAC RPU has a slightly higher base unemployment rate, but largely mirrors statewide changes over a 5-year period.

TABLE 1
Unemployment Rates in SJVAC RPU
September 2024: Not Seasonally Adjusted Data

Local Workforce Development Area (LWDA)	September 2019	September 2023	September 2024	Sept. 2019-Sept. 2024 Change	Year-Over Change (Sept. 23-Sept. 24)
California	4.0%	5.0%	5.3%	1.3%	0.3%
SJV RPU	5.87%	6.68%	7.14%	1.27%	0.46%
<u>LWDAs</u>					
San Joaquin	5.0%	5.8%	6.2%	1.2%	0.4%
Stanislaus	4.9%	5.8%	6.3%	1.4%	0.5%
Merced	5.9%	7.5%	7.8%	1.9%	0.3%
Madera	5.3%	6.2%	6.7%	1.4%	0.5%
Fresno	5.7%	6.3%	6.9%	1.2%	0.6%
Kings	6.1%	6.9%	7.3%	1.2%	0.4%
Tulare	8.2%	8.9%	9.3%	1.1%	0.4%
Kern/Inyo/Mono ¹	6.2%	7.0%	7.5%	1.3%	0.5%

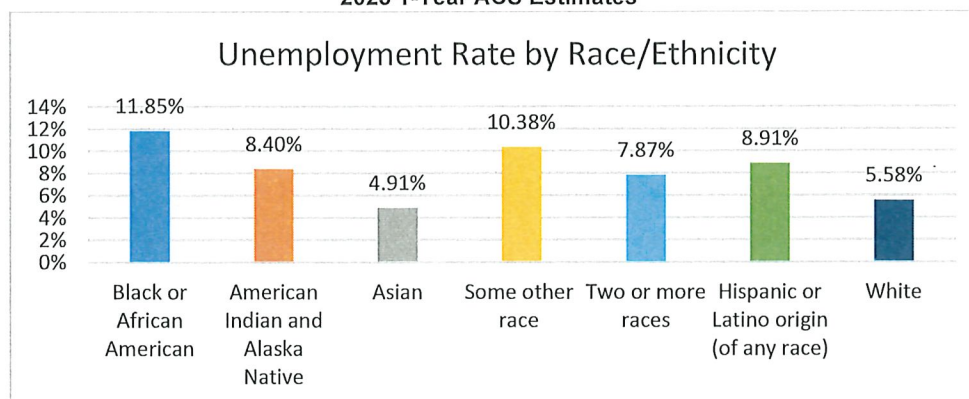
Source: Employment Development Department

¹Kern, Inyo, and Mono counties are combined into a single Local Workforce Development Area

A Closer Look at Unemployment Rates – Race/Ethnicity

The following graph uses ACS 1-Year data to examine differences in unemployment status among self-reported racial and ethnic groups. White and Asian subgroups performed best, with other minorities or self-identified racial groups having higher rates of unemployment. Black, American Indian, and Hispanic/Latino (see note below) showed much higher rates of unemployment. These systemic challenges can be tied to factors such as educational attainment, language barriers, and their over-representation in low-wage, high turnover industries. Workforce development boards and educational institutions will need to continue targeted outreach and investments into these communities to continue closing the gap.

Graph 1
SJCAV RPU Estimated Unemployment Rates by Race/Ethnicity
2023 1-Year ACS Estimates



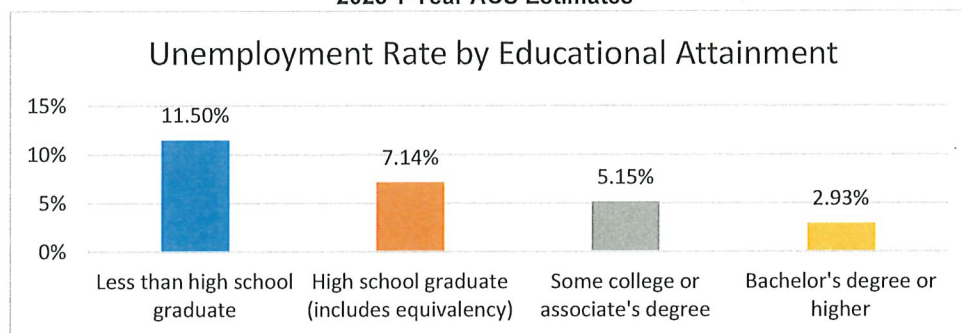
Source: ACS 1-Year Estimates, S2301 Employment Status. Does not include Mono/Inyo counties. County populations are too small to have accurate estimates for 1-Year Estimates

A Note on Race and Ethnicity: The large number of people who identify as some other race reflects a survey method decision in the way the U.S. Census Bureau classifies individuals by race. The Bureau classifies Hispanics/Latinos as an ethnic group instead of a racial group and considers ethnicity and race not to be mutually exclusive. As such, one can be Hispanic ethnically and White or Black simultaneously and the Census has different variables to reflect this. However, this ethnicity and race distinction appears to be blurred among ACS respondents. The Census Bureau reports that the vast majority of respondents who identify as some other race were Hispanics/Latinos. This same blurring of race and ethnicity may also inflate the two or more race count.

A Closer Look at Unemployment Rates – Educational Attainment

Below, Graph 2 illustrates the power that progressive levels of education play in providing job security and lower rates of unemployment. The types of occupations that higher educational attainment allow stabilizes and otherwise provides job security in a way that those without a high school degree do not experience.

Graph 2
SJCAV RPU Estimated Unemployment Rates by Educational Attainment -
2023 1-Year ACS Estimates



Source: ACS 1-Year Estimates, S2301 Employment Status

Labor Force Participation

Labor Force Participation is a measure of the population of those working or seeking work as a ratio to the full population size of a given area. The United States experienced a severe dip in Labor Force Participation during the pandemic, but it has largely recovered to previous trendlines, last estimated at 63.8%. According to those same estimates, the State of California recorded a Labor Force Participation of 64.3% and the SJVAC RPU, in the same snapshot, stood at 61.3%.

Table 3
Labor Force Participation - ACS 1-Year Estimates

	2021	2022	2023
United States	63.00%	63.50%	63.80%
California	63.40%	63.90%	64.30%
SVU RPU	59.38%	61.17%	61.30%

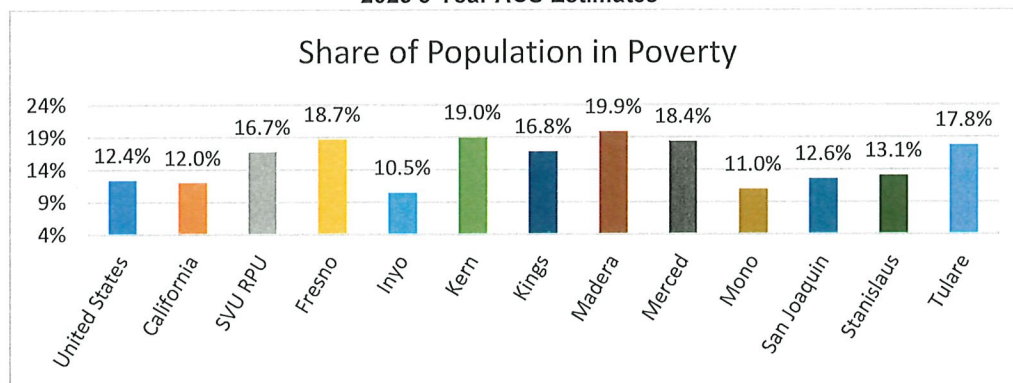
Source: 2023 ACS 1-Year estimates, S2301 Employment Status

While the region has generally lagged behind in Labor Force Participation rates, this should be viewed within the context of historical baselines and the growth in population that the SJVAC RPU has experienced relative to both the state and the rest of the nation. The total labor force is growing and remains robust, despite high baseline unemployment.

Poverty in the Region

Poverty rates in the SJVAC RPU, as one might expect based on the median earnings, are higher than in California as a whole. Interestingly, poverty measures are higher in the southern portion of the region than in the North. This may be due to the proximity to the greater Bay Area and Sacramento economies that they share. However, there are likely other underlying factors. Poverty rates have been declining for most of the region over the last several years due to a number of economic and policy factors including the post-pandemic labor shortage, changes in minimum wage, and farmworker pay structures.

Graph 3
Share of Population in Poverty - Nation, State, SJVAC RPU, and Counties
2023 5-Year ACS Estimates

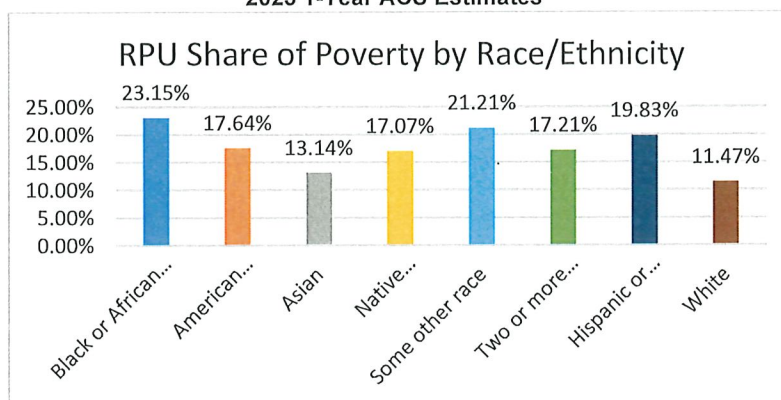


Source: ACS 5-Year Estimates, S1701 Poverty Status in the Past 12 Months

A Closer Look at Poverty – Race/Ethnicity

As one might expect, the racial makeup of poverty is not evenly experienced. White, non-Hispanic, populations outperform all other recorded ethnic or race categories collected by the American Community Survey with the lowest estimated poverty rates. This tracks largely with educational attainment and unemployment statistics across the different ethnic and race groups.

Graph 4
Share of Population in Poverty, by Race/Ethnicity - San Joaquin Valley RPU
2023 1-Year ACS Estimates

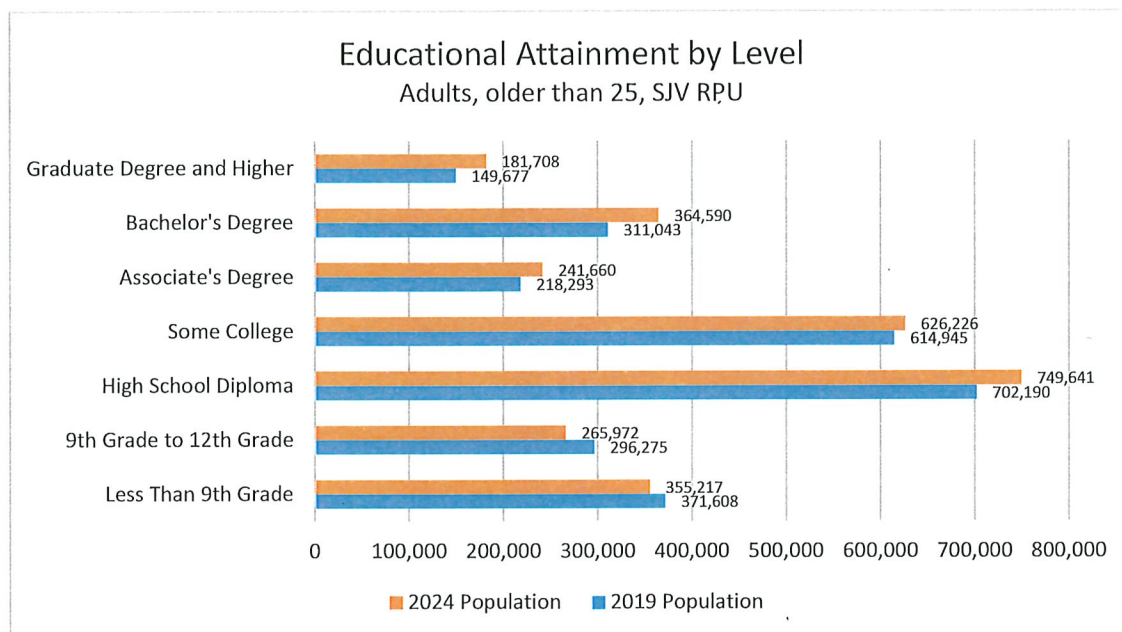


Source: ACS 1-Year Estimates, S1701 Poverty Status in the Past 12 Months

B. Analysis of the Educational and Skill Levels of the Workforce

Overall, Educational Attainment has improved for the RPU over the last five years. As seen in the following graph 5, high school diplomas, those attending college, and college degrees all increased, while those with less than a high school education decreased. With continuing emphasis on high school graduation and alternative technical pathways programs, trends seen here should continue.

Graph 5
SJVAC RPU Educational Attainment by Level Adults older than 25
2023 1-Year ACS Estimates



Source: ACS 2023 1-Year Data, EDD RPU Data Portal

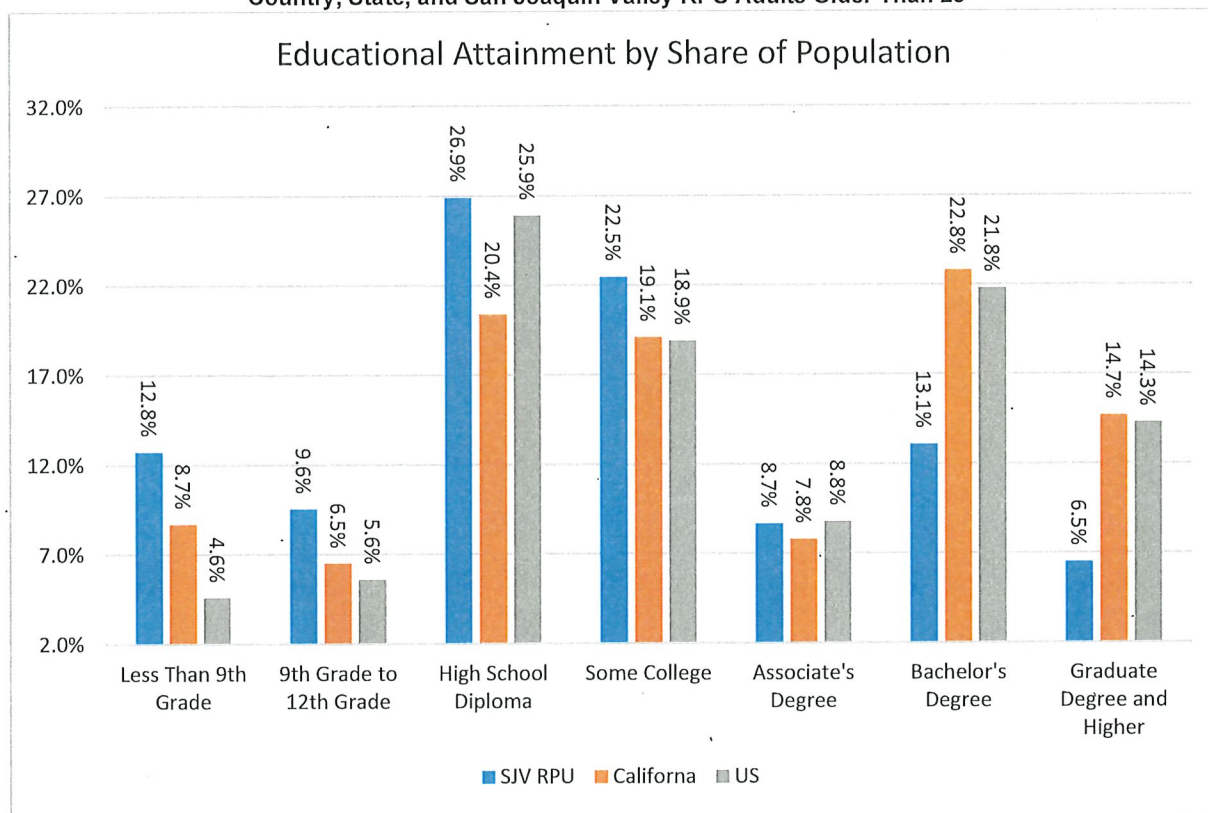
Educational Attainment – Missed Opportunities

Despite educational gains, the SJVAC RPU still lags behind the rest of the state and the nation in overall education levels. One major weakness in the region is the lack of post-secondary education options. Currently, the region is served by three California State University campuses (Stanislaus, Fresno, and Bakersfield) and one University of California campus (Merced). There are no public, 4-year degree offering institutions in 6 of the SJV RPU's 10 counties.

There is a robust community college system that has increasingly taken a leading role in post-secondary education and licensing, but those seeking bachelor's and graduate degrees are continually underserved and often seek education outside of the region, contributing to the loss of human capital in the Valley.

Additionally, rural communities often face barriers like long travel distances to colleges, fewer advanced placement courses, and lower internet connectivity, all of which can hinder educational progress. These disparities are critical, as they limit workforce opportunities and economic development in rural California, perpetuating cycles of lower income and reduced mobility. Addressing these challenges requires targeted investments in educational infrastructure, digital access, and community support programs to ensure rural residents can compete on an equal footing with their urban counterparts.

Graph 6
Educational Attainment by Share of Population
Country, State, and San Joaquin Valley RPU Adults Older Than 25



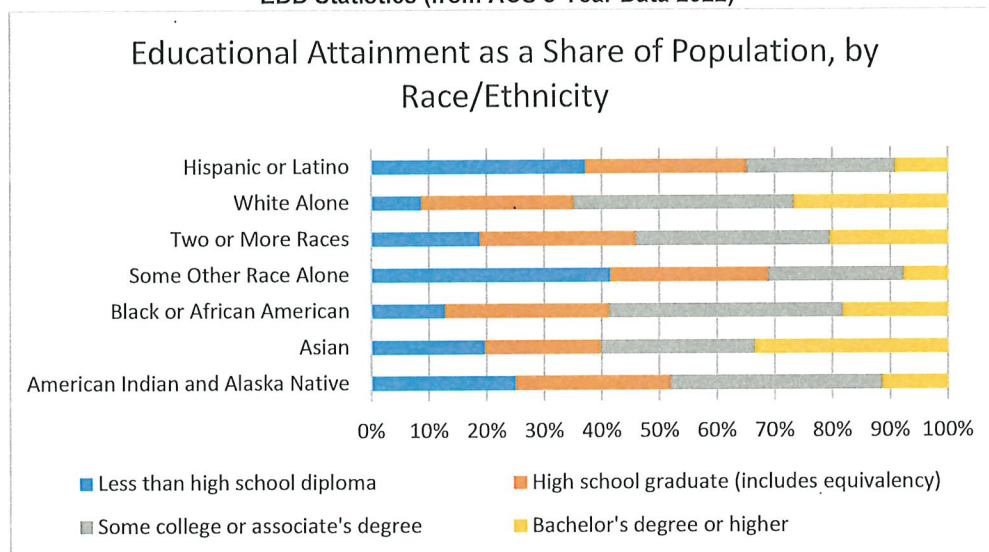
Source: EDD RPU Data Portal, Educational Attainment

A Closer Look at Educational Attainment – Race/Ethnicity

The stacked bar chart below compares the differences in educational attainment between race/ethnic groups as a ratio. Overall, this reveals that those identifying as Hispanic or Latino have the largest share of their population not possessing a high school diploma or equivalency. This may be due to the large relative share of foreign-born population that come to the U.S. as adults. However, at the other end of the educational attainment spectrum, they are also one of the demographic groups most underrepresented with higher levels of education attainment, such as bachelor's or graduate/professional degrees.

Graph 7

Educational Attainment as a share of population, by Race/Ethnicity
EDD Statistics (from ACS 5-Year Data 2022)



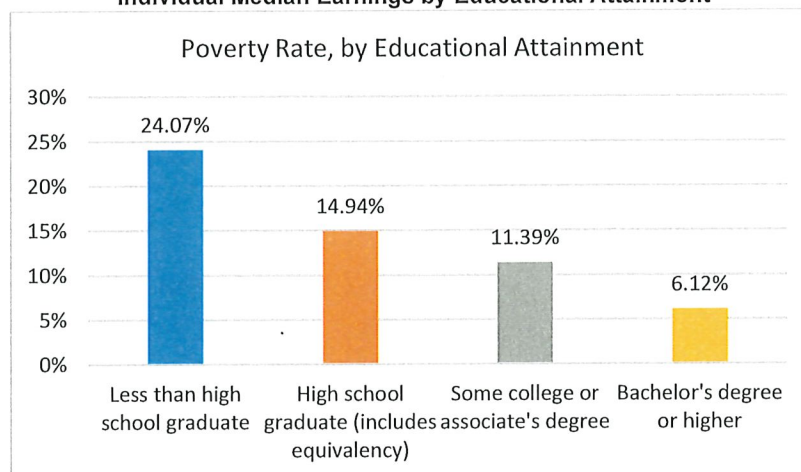
Source: EDD RPU Data Portal, Race/Ethnicity

A Closer Look at Educational Attainment – The Key Antipoverty Program

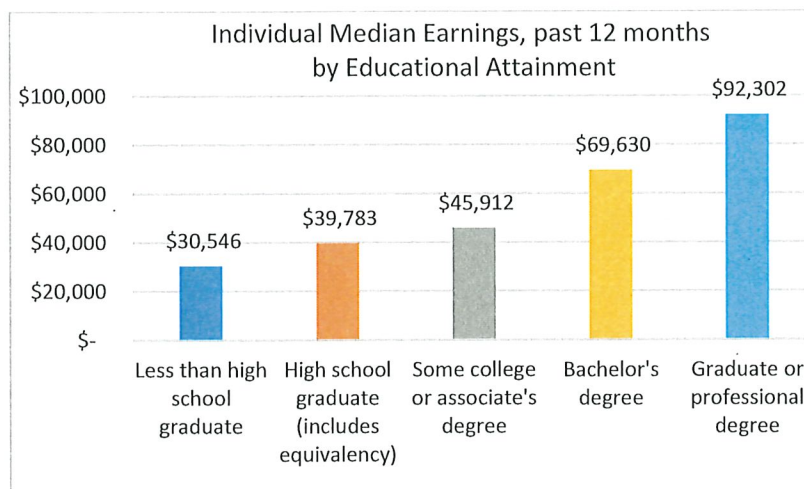
Educational Attainment significantly increase access to better-paying and more stable job opportunities. Individuals with a high school diploma are more likely to secure employment with benefits, while those with college degrees often access higher-paying professions in industries like healthcare, technology, and finance. Education also provides critical skills such as problem-solving, communication, and adaptability, which are increasingly valued in today's economy.

Graph 8 and 9

SJVAC RPU Poverty Rate by Educational Attainment
Individual Median Earnings by Educational Attainment



ACS 1-Year Data (2023)



Source, both graphs: ACS 2023 1-Year Data, San Joaquin Valley RPU Weighted Averages

C. Analysis of Industries and Occupations with Existing and Emerging Demand

This analysis takes into account both existing industry and occupational demand and demand that is emerging throughout the region. The regional Plan Data Analytics report may be viewed here: [SJVAC-Data-Analysis-Report-2025-2028](#).

Industry Sector Growth

Looking at industries that gained jobs in the last five years, the following list and analysis of growth industries filters out those with fewer than 1,000 jobs and 5-year growth of less than 7%. This removes small industries that can skew data analysis.

Transportation, Warehousing, Logistics: This collection of industries displayed strong growth in the region and appeared at or near the top of both largest and fastest growth. This is a continuing development in the economy that does not show signs of relenting, although it may slow as markets become more saturated.

Healthcare and Social Services: Hospitals, doctors offices, social services, and other public health and social services are large and important employers. This industry, especially with skilled nursing, offers the most direct path to high wages and social mobility

Construction and Related Industries: While representing a smaller portion of the labor market, this is an important sector to invest in and keep a close eye on, given its status as a leading economic indicator as well as offering high wages for skilled trade work.

Education and other Public Sectors: In many areas of the region, especially in rural towns, this sector is the highest paying and requires the most education. Teachers, public administrators, and public safety are vital skills and resources to the region's communities and a lack of investment can risk atrophying already stressed public entities.

Restaurants and Recreation: While not an industry that is seen as a lynchpin of economic activity, it does suggest a robust economy with spending money that can support and expand these offerings. Another contributing factor can be found in an increase in outdoor tourism driven by the pandemic and supported by the many public lands, national parks, and other natural outdoor tourism activities in the SJVAC RPU.

Manufacturing: Manufacturing, outside of post-harvest processing, remains a niche industry with low demand. It remains to be seen what public investments from federal and state levels as well as an increased emphasis on domestic manufacturing can manifest within the region.

Within the PY 2025-28 Regional Plan Data Analysis report, Table 5 illustrates industries (using 4-digit NAICS coding) that have gained jobs over the past 5 years. The left column organizes industries based on estimated total jobs gained and the right column organizes industries based on a percent change to attempt to capture industries that are quickly expanding. >

TABLE 5

Real Gross Domestic Product, by County (2019-2023)

Thousands of chained (2017) dollars

Counties in RPU	2019	2022	2023	2019-2023 Economic Growth (5-year)	2023 Economic Growth (1 year)
California	2,969,609,000	3,184,007,800	3,248,656,600	9.3%	2.0%
SJV RPU ¹	187,698,433	190,837,086	195,682,118	4.25%	2.54%
<u>Counties¹</u>					
San Joaquin	31,274,535	33,301,759	33,097,405	5.83%	-0.6%
Stanislaus	23,329,680	23,803,366	24,067,824	3.16%	1.1%
Merced	9,251,024	9,511,320	9,548,937	3.22%	0.4%
Madera	6,222,075	6,043,485	6,226,914	0.08%	3.0%
Fresno	45,018,790	46,107,283	47,612,742	5.76%	3.3%
Kings	6,457,601	6,868,202	7,041,297	9.04%	2.5%
Tulare	18,480,075	18,399,182	18,824,792	1.87%	2.3%
Kern	45,410,206	44,626,843	46,941,848	3.37%	5.2%
Inyo	1,223,022	1,089,927	1,141,849	-6.64%	4.8%
Mono	1,031,425	1,085,719	1,178,510	14.26%	8.5%

¹ Bureau of Economic Analysis data is collected and presented by county. For this section we have broken out the different counties in the Kern/Inyo/Mono LDWA consortium. Figures for the RPU were developed from BEA county-level data.

Source: U.S. Bureau of Economic Analysis

Industry Sector Losses

The following analysis of industry losses removes industries with job changes over 5 years that were higher than -2%

Agriculture: The largest employer for most of the region is the agricultural industry and it continues to show a decline in employment. Despite these job losses, agricultural output has remained steady which suggests an improvement in labor productivity. The industry continues to take advantage of automation innovations, as well as shifts in crop planting. These factors, along with uncertainty and expected contraction in farmed area due to climate change and public policy (namely SGMA), may lead to a further contraction in the farm labor market.

Retail and Related In-Person Commerce: While logistics, home delivery, and transportation have expanded in the SJVAC RPU, in-person commerce and retail establishments have shown large declines. Some of this can be attributed to the direct competition e-commerce offers, other automation activities can also be factors.

Federal and State Government: In comparison to the expansion and immediate requirements of local government employment, certain state and federal employment has been pulled back in the past 5 years. This may be a shift of certain public administration from those authorities down to the local level as well as efficiency gains made by state and federal officials, but it is a cautionary sign of reduced public investment into the region.

Within the PY 2025-28 Regional Plan Data Analysis report, Table 8 illustrates industries (using 4-digit NAICS coding) that have lost jobs over the past 5 years. The left column organizes industries based on estimated total jobs lost and the right column organizes industries based on a percent change to attempt to capture industries that are quickly expanding.

TABLE 8

2019-2024 Losses for Industry Sector Jobs in San Joaquin RPU

Lightcast database analysis using QCEW, ACS, BEA, and other publicly available data. 4-digit NAICS classification

<u>Industries That Lost the Most Jobs</u> (2019-2024 Change in Number)	<u>Jobs Lost</u>	<u>Industries That Declined Fastest</u> (2019-2024 Change in Percent)	<u>Percent Change</u>
Crop Production	(7,531)	Business Support Services	(57%)
Support Activities for Crop Production	(3,948)	Insurance Carriers	(50%)
Business Support Services	(3,345)	Facilities Support Services	(39%)
Insurance Carriers	(2,804)	Vocational Rehabilitation Services	(33%)
Clothing and Clothing Accessories Retailers	(2,588)	Furniture and Home Furnishings Retailers	(25%)

Employment Services	(2,534)	Clothing and Clothing Accessories Retailers	(23%)
Private Households	(2,100)	Wired and Wireless Telecommunications (except Satellite)	(23%)
State Government, Excluding Education and Hospitals	(1,700)	Support Activities for Air Transportation	(20%)
Vocational Rehabilitation Services	(1,531)	Private Households	(19%)
Depository Credit Intermediation	(1,221)	Support Activities for Mining	(19%)
Support Activities for Mining	(1,206)	Nondepository Credit Intermediation	(17%)
Animal Production	(1,139)	Printing and Related Support Activities	(16%)
Utility System Construction	(1,084)	Colleges, Universities, and Professional Schools	(15%)
Furniture and Home Furnishings Retailers	(946)	Depository Credit Intermediation	(14%)
Facilities Support Services	(928)	Utility System Construction	(14%)
Wired and Wireless Telecommunications (except Satellite)	(819)	Crop Production	(12%)
Education and Hospitals (State Government)	(816)	Employment Services	(9%)
Grocery and Related Product Merchant Wholesalers	(810)	Taxi and Limousine Service	(9%)
Colleges, Universities, and Professional Schools	(790)	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	(7%)
Department Stores	(730)	Department Stores	(7%)
Federal Government, Civilian	(677)	Grocery and Related Product Merchant Wholesalers	(6%)
Support Activities for Air Transportation	(477)	Education and Hospitals (State Government)	(6%)
Management of Companies and Enterprises	(437)	State Government, Excluding Education and Hospitals	(5%)
Child Day Care Services	(427)	Highway, Street, and Bridge Construction	(5%)
Printing and Related Support Activities	(427)	Animal Production	(5%)
Nondepository Credit Intermediation	(390)	Miscellaneous Nondurable Goods Merchant Wholesalers	(4%)
Religious Organizations	(279)	Child Day Care Services	(4%)
Miscellaneous Nondurable Goods Merchant Wholesalers	(201)	Management of Companies and Enterprises	(4%)
Taxi and Limousine Service	(181)	Sporting Goods, Hobby, and Musical Instrument Retailers	(3%)
Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	(171)	Support Activities for Crop Production	(3%)
Sporting Goods, Hobby, and Musical Instrument Retailers	(169)	Specialty Food Stores	(2%)
Highway, Street, and Bridge Construction	(119)	Federal Government, Civilian	(2%)
Other Wood Product Manufacturing	(74)	Other Wood Product Manufacturing	(2%)
Specialty Food Stores	(72)	Religious Organizations	(2%)

Source: Lightcast Industry Table, SJV RPU, 4 Digit NAICS

Occupational Gains

Occupational data differs from industry data in certain categorical and survey-design choices but attempts to highlight similar information. The main takeaways from analysis of occupations with the highest and fastest growth align largely with those of the industry level data.

Within the PY 2025-28 Regional Plan Data Analysis report, Table 9 illustrates both occupations that added the most jobs and occupations that grew the fastest.

TABLE 9
2019-2024 Growth for Occupational Data in San Joaquin RPU
Lightcast database analysis using QCEW, ACS, BEA, and other publicly available data. 4-digit SOC classification

<u>Occupations That Added the Most Jobs</u> (Five-Year Change in Number)		<u>Occupations That Grew the fastest</u> (Five-Year Change in Percent)	<u>Percent Change</u>
Total Jobs		Total Jobs	
Home Health and Personal Care Aides	24,628	Couriers and Messengers	117%
Laborers and Material Movers	18,908	Training and Development Specialists	84%
Driver/Sales Workers and Truck Drivers	10,228	Logisticians and Project Management Specialists	66%
Cooks	6,515	Transportation, Storage, and Distribution Managers	59%
General and Operations Managers	5,126	Miscellaneous Personal Appearance Workers	45%
Counselors	3,239	Home Health and Personal Care Aides	44%
Logisticians and Project Management Specialists	2,876	Bartenders	42%
Miscellaneous Business Operations Specialists	2,793	Marketing and Sales Managers	41%
Elementary and Middle School Teachers	2,513	Medical and Health Services Managers	41%
Shipping, Receiving, and Inventory Clerks	2,393	Software and Web Developers, Programmers, and Testers	40%
Marketing and Sales Managers	2,297	Human Resources Workers	38%
Physicians	2,214	Physicians	34%
Registered Nurses	2,209	Miscellaneous Business Operations Specialists	32%
Miscellaneous Healthcare Support Occupations	2,115	Shipping, Receiving, and Inventory Clerks	32%
Industrial Truck and Tractor Operators	1,968	First-Line Supervisors of Transportation and Material Moving Workers	32%
Miscellaneous Managers	1,889	General and Operations Managers	32%
Security Guards and Gambling Surveillance Officers	1,827	First-Line Supervisors of Mechanics, Installers, and Repairers	32%
Human Resources Workers	1,807	Special Education Teachers	32%
First-Line Supervisors of Transportation and Material Moving Workers	1,782	Food Service Managers	31%
Substitute Teachers, Short-Term	1,731	Counselors	28%
Training and Development Specialists	1,697	Miscellaneous Managers	26%

Bartenders	1,591	Construction Managers	26%
Therapists	1,575	First-Line Supervisors of Construction Trades and Extraction Workers	25%
First-Line Supervisors of Construction Trades and Extraction Workers	1,505	Therapists	25%
Medical and Health Services Managers	1,497	Cooks	23%
Miscellaneous Personal Appearance Workers	1,462	Laborers and Material Movers	21%
Software and Web Developers, Programmers, and Testers	1,455	Driver/Sales Workers and Truck Drivers	20%
First-Line Supervisors of Mechanics, Installers, and Repairers	1,415	Security Guards and Gambling Surveillance Officers	19%
Special Education Teachers	1,412	Industrial Machinery Installation, Repair, and Maintenance Workers	18%
Couriers and Messengers	1,397	Butchers and Other Meat, Poultry, and Fish Processing Workers	18%
Butchers and Other Meat, Poultry, and Fish Processing Workers	1,374	Accountants and Auditors	15%
Supervisors of Food Preparation and Serving Workers	1,293	Substitute Teachers, Short-Term	13%
Accountants and Auditors	1,268	Industrial Truck and Tractor Operators	12%
Food Service Managers	1,186	Supervisors of Food Preparation and Serving Workers	11%
Transportation, Storage, and Distribution Managers	1,178	Miscellaneous Healthcare Support Occupations	10%
Secondary School Teachers	1,104	Elementary and Middle School Teachers	10%
Industrial Machinery Installation, Repair, and Maintenance Workers	1,071	Secondary School Teachers	9%
Construction Managers	1,045	Registered Nurses	8%

Source: Lightcast Occupation Table, SJV RPU, 4 Digit SOC

Occupational Losses

Occupational data differs from industry data in certain categorical and survey-design choices but attempts to get at the same information. As with occupational gain, data on occupational losses align with industry level data.

Within the PY 2025-28 Regional Plan Data Analysis report, Table 10 illustrates both occupations that lost the most jobs and occupations that declined the fastest.

TABLE 10

Five-Year Losses for Occupational Data in San Joaquin RPU*

Lightcast database analysis using QCEW, ACS, BEA, and other publicly available data. 4-digit SOC classification

<u>Occupations That Lost the Most Jobs</u> (Five-Year Change in Number)		<u>Occupations That Declined Fastest</u> (Five-Year Change in Percent)	<u>Percent Change</u>
Miscellaneous Agricultural Workers	(19,263)	Radio and Telecommunications Equipment Installers and Repairers	(53%)
Cashiers	(6,032)	Tellers	(42%)
Retail Salespersons	(4,003)	Crushing, Grinding, Polishing, Mixing, and Blending Workers	(26%)
Childcare Workers	(2,570)	Graders and Sorters, Agricultural Products	(25%)
Waiters and Waitresses	(2,055)	Childcare Workers	(19%)
Bailiffs, Correctional Officers, and Jailers	(1,793)	Claims Adjusters, Appraisers, Examiners, and Investigators	(18%)
Graders and Sorters, Agricultural Products	(1,421)	Bailiffs, Correctional Officers, and Jailers	(16%)
Radio and Telecommunications Equipment Installers and Repairers	(1,412)	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	(16%)
Tellers	(1,407)	Engineering Technologists and Technicians, Except Drafters	(15%)
Construction Laborers	(1,100)	Derrick, Rotary Drill, and Service Unit Operators, Oil and Gas	(15%)
Farmers, Ranchers, and Other Agricultural Managers	(1,087)	Miscellaneous Teachers and Instructors	(14%)
First-Line Supervisors of Sales Workers	(1,043)	Medical Records Specialists	(14%)
Office Clerks, General	(1,021)	Credit Counselors and Loan Officers	(14%)
Receptionists and Information Clerks	(657)	Cashiers	(14%)
Miscellaneous Teachers and Instructors	(652)	Miscellaneous Agricultural Workers	(12%)
Crushing, Grinding, Polishing, Mixing, and Blending Workers	(612)	Waiters and Waitresses	(12%)
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	(594)	Retail Salespersons	(11%)
Engineering Technologists and Technicians, Except Drafters	(593)	Insurance Claims and Policy Processing Clerks	(11%)
Counter and Rental Clerks and Parts Salespersons	(530)	Billing and Posting Clerks	(10%)
Inspectors, Testers, Sorters, Samplers, and Weighers	(521)	Painters and Paperhangers	(10%)
Billing and Posting Clerks	(474)	Clinical Laboratory Technologists and Technicians	(10%)
Dishwashers	(470)	Dishwashers	(9%)
Painters and Paperhangers	(432)	Inspectors, Testers, Sorters, Samplers, and Weighers	(9%)
Derrick, Rotary Drill, and Service Unit Operators, Oil and Gas	(415)	Receptionists and Information Clerks	(8%)
Claims Adjusters, Appraisers, Examiners, and Investigators	(372)	Construction Laborers	(8%)
Medical Records Specialists	(302)	Tax Examiners, Collectors and Preparers, and Revenue Agents	(8%)
Credit Counselors and Loan Officers	(280)	First-Line Supervisors of Sales Workers	(6%)

Insurance Claims and Policy Processing Clerks	(236)	Counter and Rental Clerks and Parts Salespersons	(6%)
Welding, Soldering, and Brazing Workers	(207)	Drywall Installers, Ceiling Tile Installers, and Tapers	(5%)
Recreation and Fitness Workers	(206)	Farmers, Ranchers, and Other Agricultural Managers	(5%)
Tax Examiners, Collectors and Preparers, and Revenue Agents	(202)	Welding, Soldering, and Brazing Workers	(4%)
Clinical Laboratory Technologists and Technicians	(195)	Helpers, Construction Trades	(4%)
Drywall Installers, Ceiling Tile Installers, and Tapers	(171)	Office Clerks, General	(4%)
Helpers, Construction Trades	(87)	Clergy	(3%)
Securities, Commodities, and Financial Services Sales Agents	(74)	Securities, Commodities, and Financial Services Sales Agents	(3%)
Clergy	(69)	Recreation and Fitness Workers	(3%)
Carpet, Floor, and Tile Installers and Finishers	(46)	Carpet, Floor, and Tile Installers and Finishers	(2%)

Source: Lightcast Occupation Table, SJV RPU, 4 Digit SOC