



CITY OF FLAGSTAFF Flagstaff Area Workforce Analysis

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STRATEGIC WORKFORCE DEVELOPMENT PLAN

The City of Flagstaff seeks to ensure that its workforce is prepared for good jobs in Flagstaff’s growing and changing economy. The City retained Keen Independent Research LLC (Keen Independent) to develop a workforce development strategic plan to help the City coordinate efforts to train and fortify workforce in the community.

Introduction

The City of Flagstaff is at a crossroads. Historically a tight-knit mountain community, Flagstaff continues to attract full-time and part-time newcomers looking to escape to the mountains. Jobs related to Northern Arizona University, the tourism industry and service industries remain important. Second home ownership has contributed to the relative scarcity and high cost of housing. The minimum wage increase may have had unintended consequences, including local business closures and shortages of non-service industry workers. Continuing down this path, Flagstaff could become a community in which its workers cannot afford to live. “Poverty with a view,” a term now at least one-half century old, continues to describe the tradeoff many local workers face when choosing where to put down roots. One question raised in this study is what will keep Flagstaff from going the path of Aspen, where the town is for non-residents and workers make long commutes to local jobs.

The City has an opportunity to chart a different course. By following an economic growth strategy that focuses on sustainable growth and workforce development in key industries and jobs, Flagstaff can create a future in which local talent fills local good jobs and residents can thrive. Residents would be adequately prepared for careers that allow them to support their families in Flagstaff. The City has an economic strategic plan in development that envisions such a future. To prepare for this future and help meet existing labor market needs, the City’s workforce must be intentionally prepared and supported. This plan focuses on the Flagstaff workers and their pathways to economic self-sufficiency.

City Role in Workforce Development

The plan recognizes that the City is one of many partners in the local workforce development network. It does not have its own workforce development board and does not regularly receive federal funds that support local workforce development. The Coconino County Workforce Development Board is that agency. The City is also not an educational or training institution; city residents are served by an excellent university, community college, K-12 system, individual training organizations and on-the-job training with local employers. The City can be voice, convenor and partner that supports training and good jobs for people who live and work in the community. The plan focuses on this role.

1. Downtown Flagstaff, Arizona



Source: SearchNet Media via Wikimedia Commons.

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Background

Methodology

Keen Independent conducted comprehensive research on the local labor market and available workforce training, which included:

- Review of data on labor market composition and trends;
- Inventory of existing workforce development resources for job seekers in the Flagstaff area, including County programs and offerings at the university and community college;
- Interviews and focus groups with City staff, elected officials, Coconino County Workforce Development Board members and staff, higher education and K-12 administrators, and local business owners and company representatives;
- Case studies of workforce development in three communities across the United States similar to Flagstaff; and
- Other research.

Plan Organization

This plan for the City of Flagstaff to support workforce development is organized as follows:

- Overview of workforce development;
- Background on demographic and labor market trends;
- Overview of existing workforce development resources;
- Summary of comments from stakeholders;
- Lessons learned from case studies;
- Employment pathways; and
- Recommendations for the City.

This plan is supported by several appendices that are referenced throughout the document.

Priority sectors. In the City’s new economic development plan, Stiletto (the consulting firm that developed the plan) identified the following sectors as priorities for Flagstaff:

- Astronomy;
- Biomedical and healthcare;
- Food processing;
- Forestry; and
- Manufacturing.

The employment pathways section of this plan considers each priority sector. We also add sections for construction and transportation and utilities. Although not identified as a priority for growth, these additional sectors are prominent in Flagstaff and would benefit from workforce development to ensure that local workers can fill the available jobs. This plan concludes with a summary of goals and actions the City may consider adopting to support its local workforce.

Context

This plan does not directly consider the important roles the City plays in helping sustain and support a skilled workforce through addressing housing cost and availability, affordable childcare, health and wellness, mobility across the community, environmental amenities, policies that support growing local businesses, inclusive workplaces, and a broad range of other quality of life measures.

These issues were often the first to be mentioned in our research in the community, especially when Keen Independent asked, “What can the City do to support local workers?” They are as or more important to workforce development as any of the measures in this workforce development plan.

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Workforce development overview

This plan outlines a role for the City of Flagstaff to play in the development of its workforce. Understanding what workforce development is and how it typically functions helps contextualize this plan and recommendations.

Defining Workforce Development

Broadly, workforce development refers to programs, training and services designed to help workers gain employment and skills needed for advancement. Typically, workforce development programs and services have one or more of the following components:

- Facilitating job search and placement, primarily into high-quality employment with upward mobility;
- Occupational skills training, often at little to no cost;
- Job search training, which includes advice on how and where to search, resume review and interview preparation; and
- Support services (e.g., direct assistance with transportation, childcare expenses, access to technology, interview clothing).

Workforce development programs are offered by a variety of organizations, including non-profits, colleges and universities and private companies.

Workforce Innovation and Opportunity Act

The Workforce Innovation and Opportunity Act (WIOA), signed into law in 2014, reauthorized the Workforce Investment Act, which provides federal funding for state and local workforce development programs.¹ WIOA funding supports programs that are designed to develop local workers and connect them with employers.

Unified state plans. Under WIOA, states are required to have a unified plan to provide the core workforce development programs outlined in the legislation. These programs include services for adults, youth and displaced workers, among other populations.²

Workforce development boards. Workforce development boards are entities that serve as conveners of workforce development programs and service providers.³ State and local boards are stewards of WIOA dollars. The Workforce Arizona Council is the state board responsible for enacting Arizona's workforce development plan. ARIZONA@WORK is the State-level workforce development network that connects job seekers to training and employment. The Council leverages ARIZONA@WORK and partners with local boards to provide targeted services. Local boards are typically at the County level, although some larger cities have one or more workforce development boards.

Flagstaff residents are served by the Coconino County Workforce Development Board. The Board fosters connections between services, workers and employers and aims to support the production of a highly skilled workforce.

¹ Workforce Innovation and Opportunity Act, Pub. L. No. 113-218 (2014). <https://www.congress.gov/113/bills/hr803/BILLS-113hr803enr.pdf>

² Ibid.

³ National Skills Coalition. (2014) *Update: Side-by-side comparison of WIA and WIOA*. <https://nationalskillscoalition.org/blog/higher-education/updated-side-by-side-comparison-of-wia-and-wioa/>

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Demographic and labor market trends

We provide an overview of Flagstaff’s demographics and labor market to highlight trends we considered in the construction of this plan. Appendix A reviews this and other information in more detail.

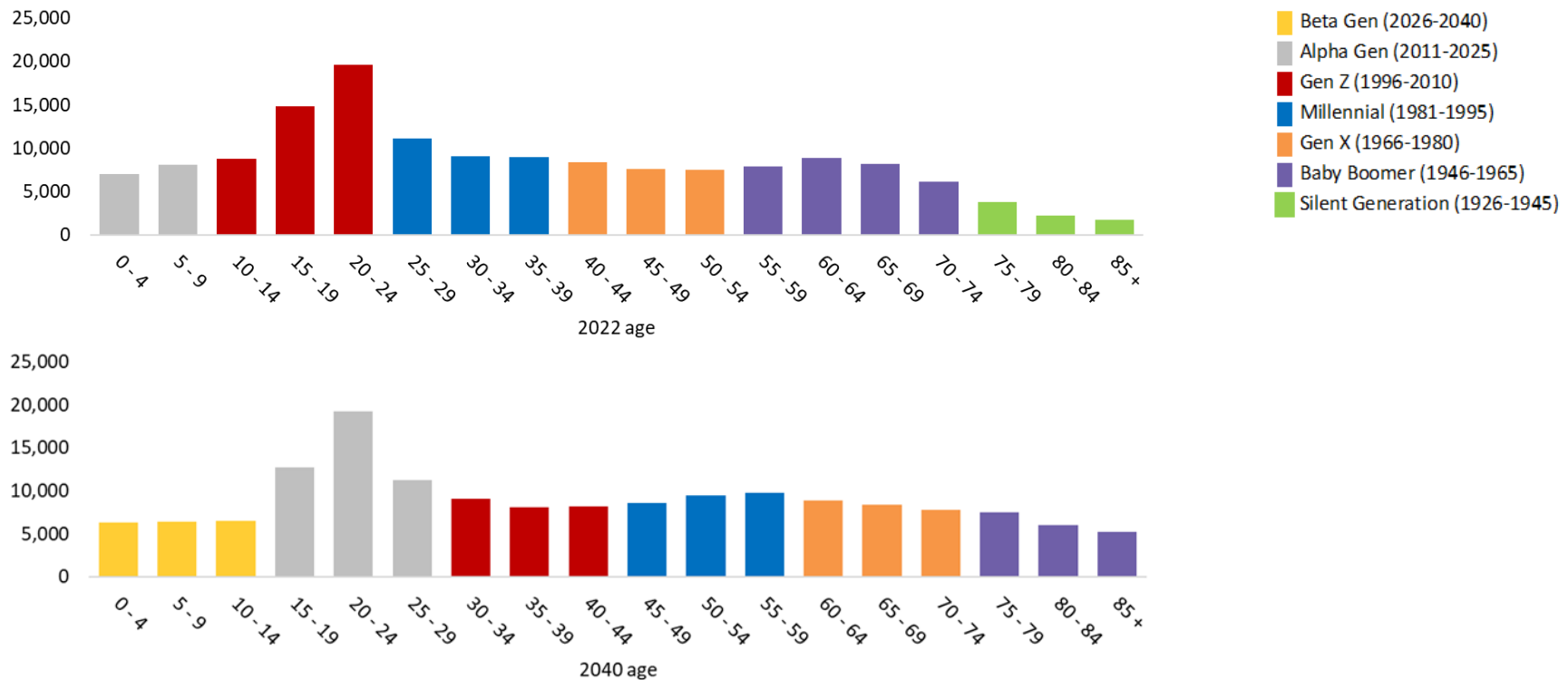
Demographics

Over the next 15 years, the population of Coconino County is expected to grow from about 150,000 to about 160,000 according to projections by the Arizona Commerce Authority.

Although a modest population increase is expected, the Flagstaff area has for decades experienced an exodus of young adults, many of whom can no longer afford to live in the area. Figure 2 below shows this trend. In 2022, Generation Z is the largest age group, but in 2040, the population of Generation Z has decreased substantially.

The Flagstaff workforce is highly educated. More than half of residents have a bachelor’s degree or higher compared to about a third of Arizona residents (see Appendix A for additional demographic information).

2. Population by age group and generational cohort, Coconino County, 2022 and 2040



Source: Arizona Commerce Authority Coconino County Medium Series Population Projections.

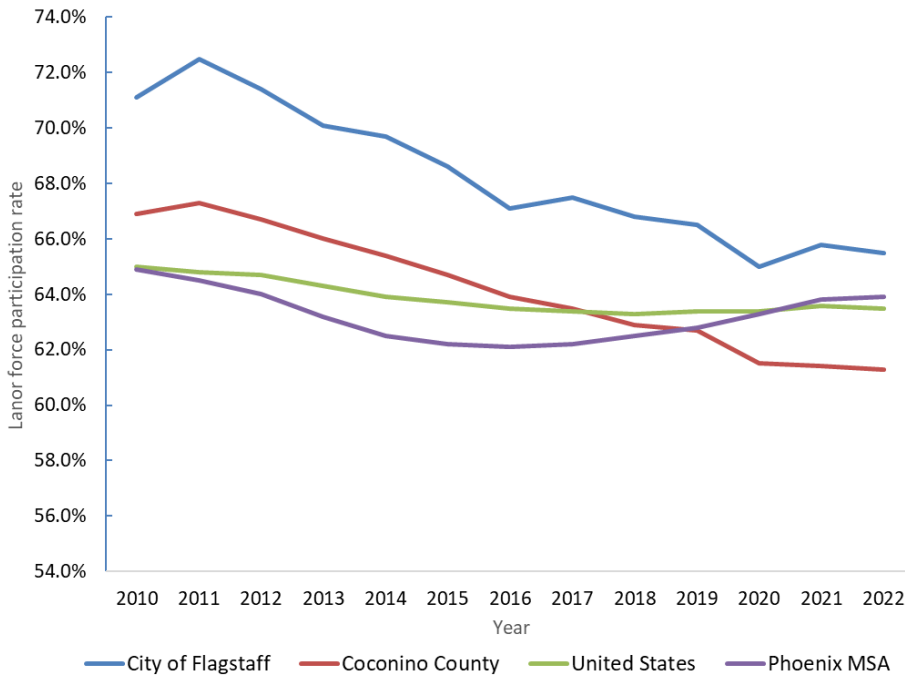
STRATEGIC WORKFORCE DEVELOPMENT PLAN — Demographic and labor market trends

Flagstaff Labor Market

Based on past trends, State projections indicate that the county will add the most jobs in the leisure and hospitality industry within the next decade.

Labor force participation. Although Flagstaffs population has grown modestly in recent years, the labor force has not kept pace. Figure 3 shows that the labor force participation for city residents is higher than other areas, it has been decreasing

3. Labor force participation rates, 2010-2022



Source: U.S. Census Bureau, American Community Survey 5-Year Estimates.

Employment and projections by industry. In 2022, the following industries had the highest levels of employment in Coconino County:

- Leisure and hospitality (17,131 employees);
- Education and health services (16,661 employees); and
- Trade transportation and utilities (10,200 employees).

If current trends continue, professional and business services and construction are expected to also be large employers by 2032. More information on employment trends can be found in Appendix A.

4. Coconino County 2022 and 2032 employment by industry

Coconino County	2022 Employment	2032 Employment	Percentage change	Numeric change
Industry				
Leisure and Hospitality	17,131	19,120	11.6 %	1,989
Education and Health Services	16,661	18,128	8.8	1,467
Trade Transportation and Utilities	10,200	10,907	6.9	707
Professional and Business Services	4,638	6,155	32.7	1,517
Self Employed	4,568	4,282	-6.3	-286
Government	4,215	4,163	-1.2	-52
Manufacturing	3,482	3,525	1.2	43
Construction	2,983	3,622	21.4	639
Other Services	2,395	2,429	1.4	34
Financial Activities	1,700	1,938	14.0	238
Information	543	646	19.0	103
Natural Resources and Mining	233	286	22.7	53
Total	68,749	75,201	100.0 %	6,452

Source: Arizona Commerce Authority, Employment Industry Projections.

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Existing workforce development resources

There are many workforce development programs and services that currently serve Flagstaff residents (reviewed in more detail in Appendix B). Some are eligible for WIOA funding while others are not. We note that subsidization of participation in a WIOA-eligible program also depends on individual income eligibility.

As mentioned in the introduction, the City of Flagstaff does not directly receive funds for workforce development. Rather, the Coconino County Workforce Development Board is the recipient of federal workforce development funding.

Education Programs

Flagstaff has two major higher education institutions that both provide workforce development programs and services.

Northern Arizona University. Major workforce development resources at Northern Arizona University (NAU) include career education and counseling. Career Steps is a series of online career preparation modules available to any NAU student. The Educational Opportunity Centers program offers counseling to low-income participants who want to enter or continue a high school equivalent, postsecondary education or a postsecondary credential program. Additionally, students in NAU's bachelor's degree programs in Nursing and Computer Information Technology are eligible for WIOA funding to support their education.

Coconino Community College. Historically an institution that has supported adult education and vocational training, Coconino Community College (CCC) currently offers 24 programs that are eligible for WIOA funding. Commercial Driver's License (CDL) training is one of their more popular programs. Additionally, CCC offers a Career and Technical Education program with eight career pathways that result in an associate's degree or certificate upon completion. CCC offers a variety of non-credit courses.

Independent Training Programs

Several other entities in Flagstaff offer workforce training. Here, we list four that have WIOA-eligible programs.

- Warrior-to-Inspector;
- Northland Hospice and Palliative Care;
- Sedona School of Massage; and
- Kuttz Beauty and Barber College.

Apprenticeship Programs

Although apprenticeship programs are relatively rare in Flagstaff, two that we identified are through the Northern Arizona Contractors' Association and Boilermakers Western States. The former program is eligible for WIOA funding while the latter is not.

ARIZONA@WORK Programs

ARIZONA@WORK is the State workforce development network. All services provided through the ARIZONA@WORK are supported by WIOA funding. There are two ARIZONA@WORK Career Centers in Flagstaff and they provide workshops, career fairs and other services. Additional services offered through ARIZONA@WORK include:

- Reemployment services;
- Job training opportunities for adults aged 55 or older;
- Career services for individuals with disabilities; and
- Career services for Native Americans.

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Stakeholder feedback

As part of the economic development research, Stiletto conducted a survey of the Flagstaff community that included workforce development questions Keen Independent developed. Keen Independent conducted individual interviews and focus groups with stakeholders (detailed in Appendix C), who corroborated much of what members of the public said in the survey.

Education

Stakeholders described Flagstaff’s workforce as highly educated. This is reflected in the community survey, for which nearly a third of respondents held a master’s degree. However, several interview and focus group participants pointed out that the workforce is “missing that middle ground,” referring to skilled trades workers.

Challenges

Interview and focus group participants identified several challenges facing Flagstaff’s workforce, including:

- High cost of living;
- Lack of affordable housing;
- Lack of affordable childcare;
- Awareness of workforce development resources;
- Shortage of workers in skilled trades and nursing; and
- Employers struggling with the minimum wage.

City Role

One of the more common suggestions from stakeholders was for the City to become a leader in workforce development and facilitate dialogue around it. Several interview and focus group participants mentioned the City coordinating with the County on messaging and working with CCC and NAU to offer more WIOA-eligible programs.

Not everybody has to go to a four-year college. You can get certificates in different areas that are highly needed.

City elected official

We get so many people that are really excited about the opportunity work for, work in Flagstaff, they just can't make the numbers work with [the high cost of living].

City employee

I'm paying my guys \$40, \$45 an hour and I advertise that ... to look for other mechanics nationwide and I can't get anybody to move here because our rent prices are so high because our housing is so low.

Small business owner

I just believe that a lot of people just don't know about all the resources that are available to them.

Workforce professional

And I don't see [shortage of skills among] our workforce as being the problem. The problem is minimum wage

Workforce professional

Maybe the City needs to ... adopt a leadership role within Northern Arizona.

Healthcare employer representative

I would like to see us [continue to] be smart about investments in economic development. Growth has been what we've been talking about, but it really means the type of growth that we want.

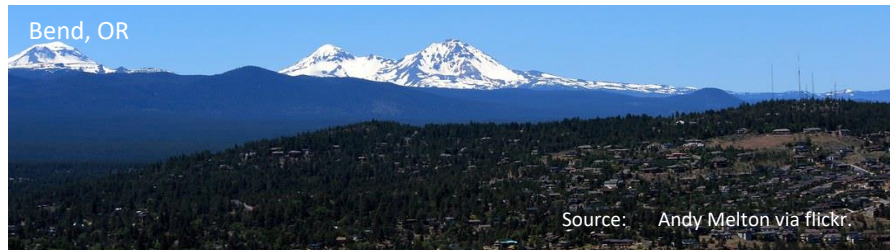
City elected official

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Case studies of workforce development

To provide the City with examples of workforce development strategies from other communities, Keen Independent conducted case studies of the following cities:

- Asheville, North Carolina;
- Bend, Oregon; and
- Missoula, Montana.

Communities were selected because they have some similarities to Flagstaff in terms of population, geography and economy. Appendix D provides more detail on each individual city.



Key Takeaways

Like Flagstaff, Asheville, Bend and Missoula communities with unique cultures and distinct challenges. We noted, however, several commonalities with the workforce development systems in each community.

- Cities themselves do not directly offer full workforce development programs and instead partner with other agencies and organizations to deliver programs and services.
- Local workforce development boards often lead local workforce development and have extensive partnerships with other organizations that act as service providers.
- Local community colleges are instrumental in providing workforce development, such as licensing and certification, soft skills training and industry-specific job training.
- Training programs are often general (internships, soft skills, low-hours certificates, CDL) but workforce development in some communities also invest in workforce for specific industries (OJT) and longer-term training, such as apprenticeship programs.
- Cost of living and housing are concerns in all case study communities. Although such issues go beyond the scope of this report, they greatly impact the workforce and create more urgency to train more residents for living wage jobs.

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Employment pathways

Employment pathways look different for job seekers with and without college degrees. We consider both in this section.

Framing Pathways

Ensuring that residents have opportunities to obtain jobs that allow them to live in Flagstaff should be a top priority of the City. We describe what those pathways may look like for different job seekers in terms of the priority sectors and present additional sectors for consideration.

Needed annual income. A single adult with no children needs annual income of more than \$50,000 to support themselves working full-time.⁴ Annual median salaries for most jobs included in the employment pathways exceed that amount or are within a few thousand dollars.

Note on food service workers. Many of the jobs in the leisure and hospitality industry are in food service. We do not include food service jobs in this plan because our research indicates that additional training is not needed for food service workers, who are available for work but are not earning a living wage. Workforce development training will address little unmet need in terms of preparing food service workers. Many would benefit from upskilling or training for other career paths to better paying jobs.

Four-Year Degree Pathways

Between NAU and CCC, Flagstaff produces thousands of graduates each year in a variety of fields. Job seekers with four-year degrees and more advanced degrees have options for careers that will earn them a living wage, depending on their field.

Priority sectors. The priority sectors with living-wage jobs that require a bachelor's degree (or higher) include astronomy, biomedical and healthcare, and forestry.

Astronomy. As NAU and other universities already produce graduates who are prepared to enter careers in astronomy, there is little need for major workforce support from the City of Flagstaff. Potential actions the City could take to support local workers seeking jobs in this sector include promotion of astronomy careers and recognition of the contributions of astronomical research to the community.

Biomedical and healthcare. NAU educates students for many types of biomedical and healthcare careers through bachelor's and more advanced degrees. The four-year nursing bachelor's degree program at NAU is WIOA-approved. NAU is working to establish a College of Nursing, which will provide more robust training for students seeking careers in healthcare. The Community College trains students for jobs requiring two-year degrees or certificates and could become a larger training provider for the healthcare sector.

To support job seekers in the biomedical and healthcare sector, the City of Flagstaff and other partners may consider facilitating conversations with local healthcare providers and the Coconino County Workforce Development Board to identify the needs that additional training programs in biomedicine and healthcare could address. Additionally, the City may offer support to CCC and NAU as they work to have more programs approved for WIOA funding.

⁴ Glasmeier, A. (2024). *Living wage calculator for Flagstaff, AZ*. Massachusetts Institute of Technology. <https://livingwage.mit.edu/metros/22380>

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Employment pathways

Forestry. NAU’s School of Forestry offers bachelor’s, master’s and doctoral degrees in forest science. Additionally, the school offers several certificate programs, including Fire Ecology and Management, Forest Resilience and Adaptation, and Natural Resource Management. These programs are not supported by WIOA and the City may consider assisting the County with this process.

Other options. The following occupations require a bachelor’s degree or higher and have median salaries above \$95,000:

- Industrial production manager;
- Chief executive;
- Computer and information systems manager;
- Industrial engineer;
- Sales manager;
- Computer network architect;
- Business school professor;
- Computer programmer;
- Lawyer;
- Mechanical engineer;
- Occupational therapist; and
- Physical therapist.

Many of these occupations are management-level positions, which require experience and may benefit from certifications. Job seekers looking to advance to management positions in their field may consider taking certification courses at CCC. The City could engage in dialogue with major employers in various industries to determine what types of training or certification programs would be beneficial for workers looking to advance to management and assess current training offerings for gaps.

5. Median annual earnings of occupations related to astronomy, biomedical/healthcare and forestry in Coconino County, 2022

Occupation	Median annual earnings	Typical education level
Astronomy occupations		
Physical scientist	\$ 102,044	Bachelor's degree
Computer and mathematical occupations	76,190	Bachelor's degree
Biomedical/healthcare occupations		
Biomedical engineer	\$ 165,541	Bachelor's degree
Pharmacist	153,480	Doctoral or professional degree
Physician assistant	129,987	Master's degree
Nurse practitioner	121,009	Bachelor's degree
Medical and health services manager	102,911	Bachelor's degree
Forestry occupations		
Conservation scientists	\$ 75,026	Bachelor's degree
Environmental scientists	63,757	Bachelor's degree

Source: Arizona Commerce Authority, 2022 Occupational Employment and Wages.

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Employment pathways

High School Diploma (or Equivalent) Pathways

Statistically, workers with higher levels of education earn, on average, higher salaries than those with a high school diploma. However, job seekers in Flagstaff have many options, including two-year degree programs, certificate programs and training programs, that will position them to obtain living-wage employment.

Priority sectors. The priority sectors with the most opportunity for job seekers with high school diplomas are food processing and manufacturing.

Food processing. As food processing occurs in large plants, many of the jobs in this sector fall under manufacturing.

Manufacturing. Although manufacturing as a sector is projected to experience a decline in the next 10 years, there is opportunity for Flagstaff to attract more clean manufacturing jobs, and many occupations within the sector will change.

CCC offers a CNC machinist training course to help job seekers in manufacturing stay ahead of automation by learning to service automated machines. Additionally, CCC offers a Certified Manufacturing Engineer course for individuals who have worked at least four years in a manufacturing engineering job. These programs are not supported by WIOA funding. Stakeholders mentioned apprenticeships as helpful in manufacturing. However, formal apprenticeship programs are not widely offered in Flagstaff.

The City may work with the Workforce Development Board and CCC to make the above manufacturing courses WIOA eligible. Additionally, the City can champion apprenticeship programs and promote soft skills and other training courses that may benefit workers as the manufacturing sector becomes increasingly automated.

Other options. Construction and transportation are among other sectors that offer job seekers paths to economic self-sufficiency.

Construction. Similar to manufacturing, construction can include workers across sectors. On-the-job training was identified by stakeholders as particularly effective for sectors like construction where experience is crucial. The Coconino County Workforce Development Board has funding to support on-the-job training for eligible employers through ARIZONA@WORK. Additionally, CCC offers construction associate's degrees and certificate programs that provide participants with practical experience. Those programs are not supported by WIOA funding, but CCC's HVAC certificate program is eligible.

The City of Flagstaff may consider assisting the County with expanding its allocation of WIOA funding for on-the-job training. The City can build relationships with employers in construction (and other industries) and inform them of the availability of this funding. Then, the City may facilitate the necessary coordination between employers and the County to set up the WIOA-funded on-the-job training program.

Transportation. Transportation also supports other sectors. Although college degrees are not required for most transportation occupations, many do have certification requirements. Many stakeholders indicated that CDL-certified drivers are in high demand in Flagstaff. Both NAU and CCC have partnered with industry organizations to offer CDL certificate courses that can be completed within four to six weeks. The CCC program is eligible for WIOA funding support but the NAU program is not (we note that NAU's program is newer).

The City may work with NAU and the County to expedite approval of their CDL programs for WIOA funding support. Additionally, on-the-job training support could benefit employers and workers for other jobs in this sector, so the City may consider facilitating conversations between employers in this sector and the Workforce Development Board.

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Employment pathways

Miscellaneous. Other career opportunities for workers with a high school diploma or equivalent with a median salary of more than \$60,000 per year include the following:

- Supervisor of police and detectives;
- Chef or head cook;
- Supervisor of entertainment and recreation workers;
- Food service manager;
- Lodging manager; and
- Supervisor of firefighters and prevention workers.

As with the college degree pathways to jobs in other sectors that were not identified as priorities for growth, many of these occupations are supervisor-level positions. Thus, workers looking to advance may benefit from skills training courses offered by CCC. Again, the City may consider comparing available training opportunities to skills employers in these sectors cite as required for advancement.

6. Median annual earnings of occupations related to construction and manufacturing in Coconino County, 2022

Occupation	Median annual earnings	Typical education level
Construction occupations		
Supervisors of construction workers	\$ 66,467	HS diploma or equivalent
Construction equipment operators	50,618	HS diploma or equivalent
Construction and building inspectors	56,651	HS diploma or equivalent
Highway maintenance workers	46,226	HS diploma or equivalent
Manufacturing occupations		
Supervisors of production workers	\$ 65,932	HS diploma or equivalent
Machinists	63,070	HS diploma or equivalent
Industrial machinery mechanics	63,417	HS diploma or equivalent
Welders, cutters, solderers and brazers	46,881	HS diploma or equivalent
Transportation occupations		
Transportation, storage and distribution managers	\$ 84,520	HS diploma or equivalent
Supervisors of transportation workers	47,282	HS diploma or equivalent
Heavy and tractor-trailer truck drivers	48,753	HS diploma or equivalent
Light truck drivers	45,909	HS diploma or equivalent

Source: Arizona Commerce Authority, 2022 Occupational Employment and Wages.

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Summary

The City of Flagstaff seeks to be more engaged in developing its workforce. The previous sections provided guidance by sector and the present section provides overall guidance for the City.

City Role in Workforce Development

Most City governments are not directly involved in creating workforce development programs. Rather, they partner with other organizations, including the local workforce development board, to promote programs and services to their residents. The City of Flagstaff may best use its influence and resources to connect workforce development programs and services across institutions and ensure that businesses have a voice in the process.

Strategic Goals

We propose the following four strategic workforce development goals to the City of Flagstaff:

1. Promote existing programs and pathways to jobs that require four-year degrees and more advanced degrees.
2. Encourage the creation of new certificate programs and training programs that are responsive to market needs.
3. Promote upskilling programs that will allow workers to advance in their careers.
4. Facilitate ongoing conversations with local business representatives and with workers to learn more about and respond to their needs.

The table (P-8) on the following page describes the target population served by each goal, suggested actions that would make progress toward each goal, and a timeframe for implementing each action.

Integration with Economic Development Strategic Plan

In addition to the primary sectors of focus, the City's Economic Development Strategic Plan, developed by Stiletto, outlines four pillars where recommendations focus:

1. Focus and positioning;
2. Branding and awareness;
3. Sustainable economic development; and
4. Community ecosystem development.

Workforce development integrates horizontally through all pillars. Desired outcomes from the workforce development plan that align with the four pillars include:

- Aligning the talent pipeline to the priority sectors;
- Presenting a clear value proposition for workers, who seek clear information about how to enter and advance in desired careers;
- Presenting a clear value proposition for businesses that want to be sure their needs will be met by the future workforce;
- Ensuring that the talent pipeline evolves to meet future needs of key sectors;
- Developing formal partnerships with the workforce development board, NAU and CCC; and
- Positioning the City as a connector between workforce development resources, businesses and workers.

STRATEGIC WORKFORCE DEVELOPMENT PLAN — Summary

7. Overall goals, suggested actions and timeframe for City of Flagstaff workforce development strategy

Goal	Target population	Sample actions	Timeframe (years)		
			1-2	3-5	6-10
1. Promote existing programs and pathways to four-year+ degree required jobs	Workers with bachelor's degrees or higher	Formalize partnerships with NAU and CCC		X	
		Develop a workforce development landing page that describes career pathways		X	
2. Encourage new certificate and training programs	Skilled trade workers	Formalize partnership with Coconino County Workforce Development Board	X		
		Collect data from employers on what types of skills incoming employees need		X	
		Endorse new training programs (e.g., through NAU or CCC) that will lead to a recognizable credential			X
3. Promote upskilling programs	Workers looking to advance/change careers	Formalize partnership with Coconino County Workforce Development Board	X		
		Develop a workforce development landing page that includes an overview of local skills training programs		X	
		Develop communications strategy around skill-building programs through CCC, CCWDB and others			X
4. Facilitate conversations with businesses to determine needs	All workers	Form business advisory groups to regularly solicit feedback from various sectors		X	
		Encourage local business leaders and workers to serve on County Workforce Development Board			X
		Explore using City BBB funds to support businesses in developing paid internships that are not eligible for WIOA funding due to income eligibility restrictions	X		

APPENDIX A. Labor Market Trends — Introduction

Keen Independent examined labor market trends and current conditions for the Flagstaff region. This includes:

- Analysis of changes in employment, unemployment, total workers by age and participation in the labor force;
- Types of jobs and industries that comprise the largest share of local employment, now and in the future; and
- Labor force, industry and occupational employment projections, including projected job openings.

The following pages of Appendix A present results of these analyses.

Methodology

The following section describes the methodology utilized by Keen Independent in its analysis of the Flagstaff labor market.

Definition of the region. Federal and state data sources regarding economic and labor force conditions in the Flagstaff area usually only provide data at the county level. Therefore, Keen Independent often had to use data that aggregated all jobs or workers within Coconino County when analyzing conditions in the Flagstaff area.

Based on AZ Commerce Authority July 1, 2023, population estimates, a majority of the residents of Coconino County (approximately 53%), live within the City of Flagstaff and only 11 percent reside in the other incorporated cities in the County. Use of County information is appropriate and relatively accurate for this study.

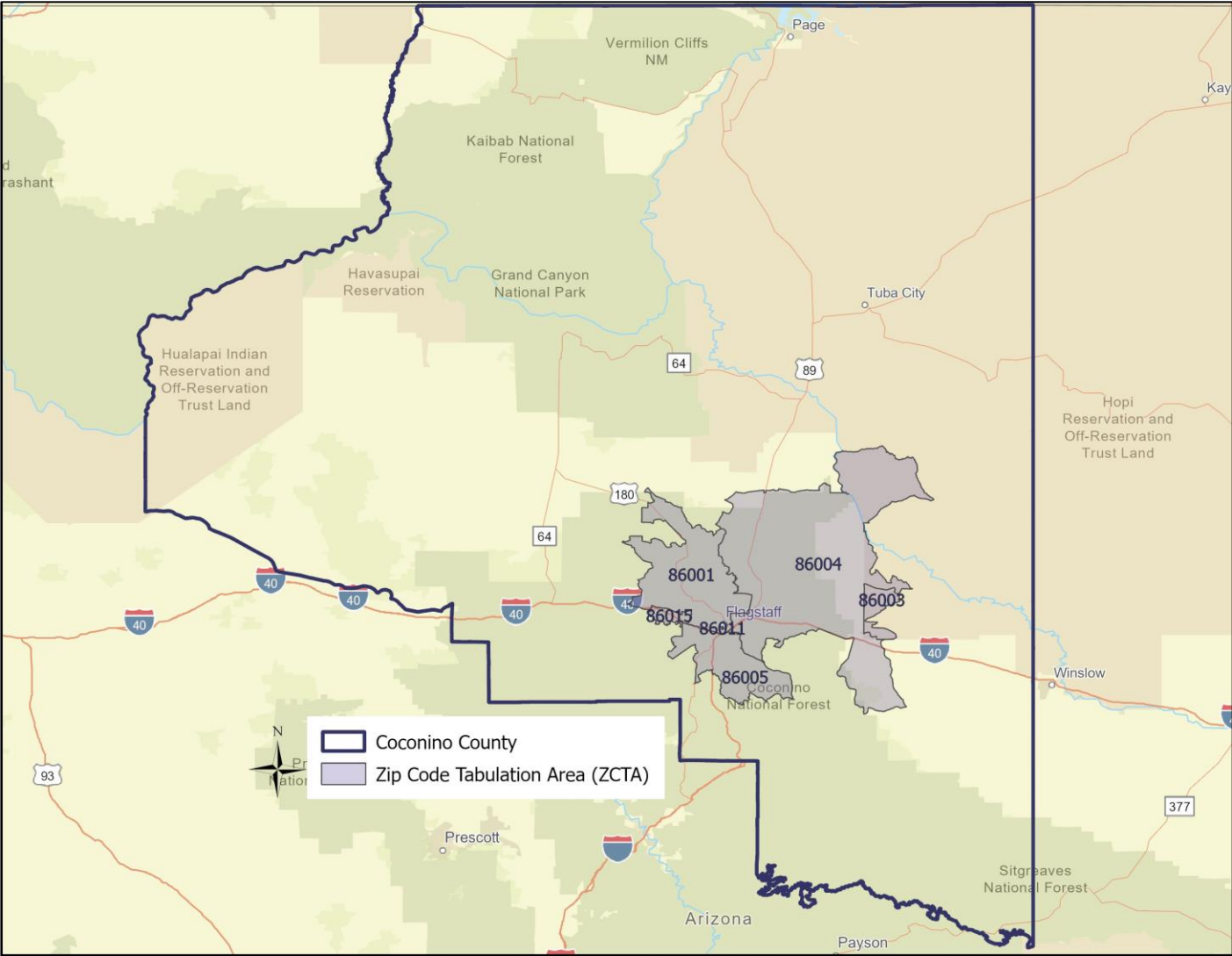
Data sources. Keen Independent primarily obtained employment and workforce data from the U.S. Census Bureau ACS 5-Year Estimates and labor market data provided by the Arizona Commerce Authority and Bureau of Labor Statistics (BLS).

Coordination with Others Performing Economic Research

Concurrent with the Keen Independent study, the City of Flagstaff retained Stiletto, an economic research firm, to develop an economic development strategic plan for the Flagstaff area. Keen Independent consulted with Stiletto professionals, City staff and staff of the Coconino County Workforce Development Board throughout this process.

A. Labor Market Trends — Introduction

A-1. ZIP codes included in the Flagstaff area



Source: Esri, TomTom, Garmin, FAO, NOAA, USGS, Bureau of Land Management, EPA, NPS, USFWS, Ohio Emergency Management Agency and U.S. Census Bureau shapefiles and basemaps.

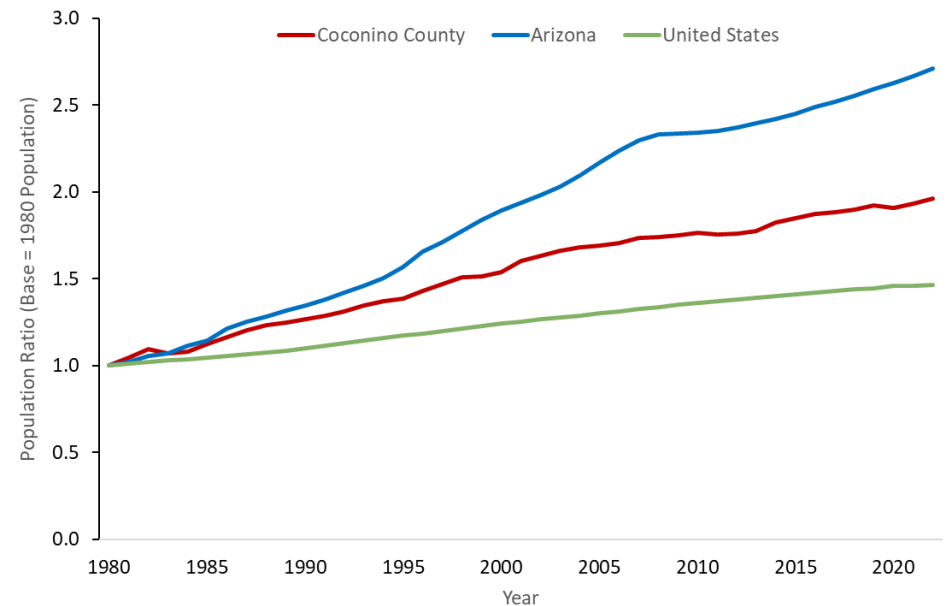
A. Labor Market Trends — Total population by age

Coconino County Population Compared to Arizona and the United States

The study team analyzed historical population estimates for Coconino County from the Arizona Commerce Authority from 1980 to 2022 and found that its population has doubled during that time from approximately 76,000 to 150,000. Keen Independent also compared the population growth of Coconino County with that of Arizona and the United States during the same time period. To do so, population ratios were developed using 1980 population levels as the base year for each region. Figure A-2 on the right shows these results.

Results indicate that Arizona’s population has almost tripled since 1980. Coconino County’s population has not grown at the same rate as the state but has increased at a faster rate than the United States as a whole.

A-2. Coconino County, Arizona and U.S. trends in population 1980–2022



Source: Arizona Commerce Authority and World Bank Population Estimates

A. Labor Market Trends — Total population by age

Overall Population Growth

The Arizona Commerce Authority developed population projections for Coconino County through 2040. Figure A-3 shows the Medium Series projections, which have county population growing to about 160,000 residents in 2040, up from 150,000 people in 2022. Overall, the county is projected to grow by about 500 residents per year.

Some of this population growth will come from more births than deaths in the county over this period, but much more will come from net in-migration to the county. (In-migration to the county will account for about four times the population change due to births and deaths.¹)

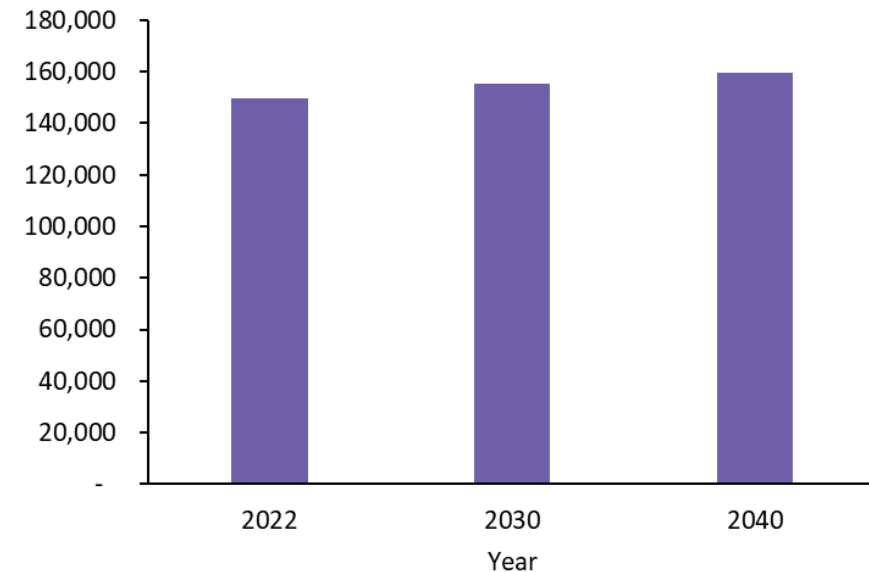
Population in Coconino County has grown more slowly than Arizona as a whole and the State’s projection of continued slow county population growth mirrors past trends. If conditions in the Flagstaff area were to change, there could be an uptick in the rate of population growth.

Changes by Age Group

Figure A-4 on the following page shows total county population by age group and generational cohort for 2022 and projections for 2030 and 2040 (also come from the Medium Series projections).

Many individuals in the Gen Z population now living in the county, which is college age and other young adults (shown in red in the top graph in Figure A-3), are projected to move out of the county by 2030 (shown in red in the second graph in Figure A-3). This pattern will be repeated by the Alpha generation by 2040, again following past trends.

A-3. Coconino County population projections, 2022, 2030 and 2040

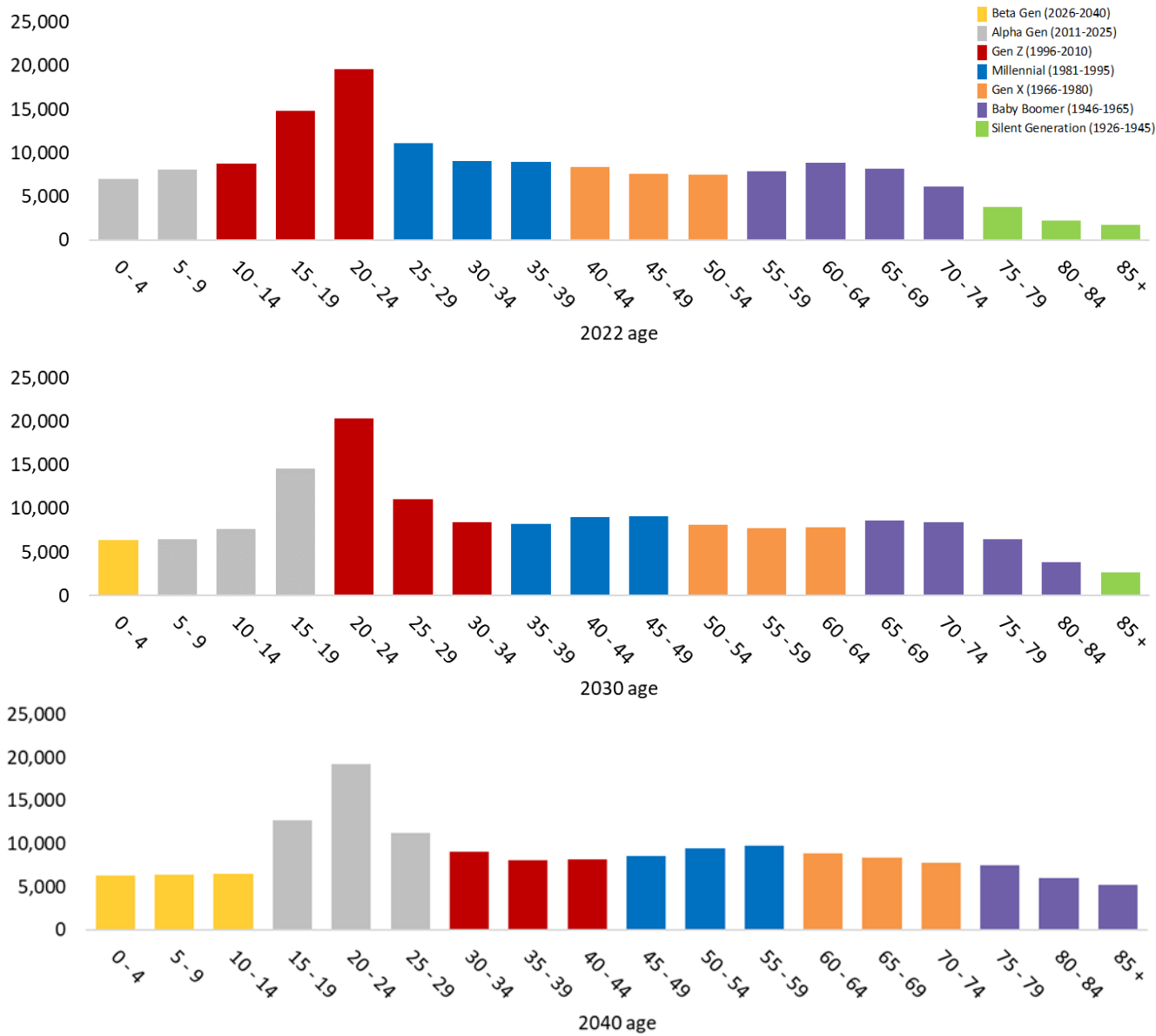


Source: Arizona Commerce Authority Coconino County Medium Series Population Projections

¹ Arizona Commerce Authority Coconino Population Projections Medium Series, Table 1. Total population and components of population change, accessed via: <https://www.azcommerce.com/oeo/population/population-projections/>

A. Labor Market Trends — Total population by age

A-4. Population by age group and generational cohort, Coconino County, 2022, 2030 and 2040



Source: Arizona Commerce Authority Coconino County Medium Series Population Projections.

A. Labor Market Trends — Total labor force and employment

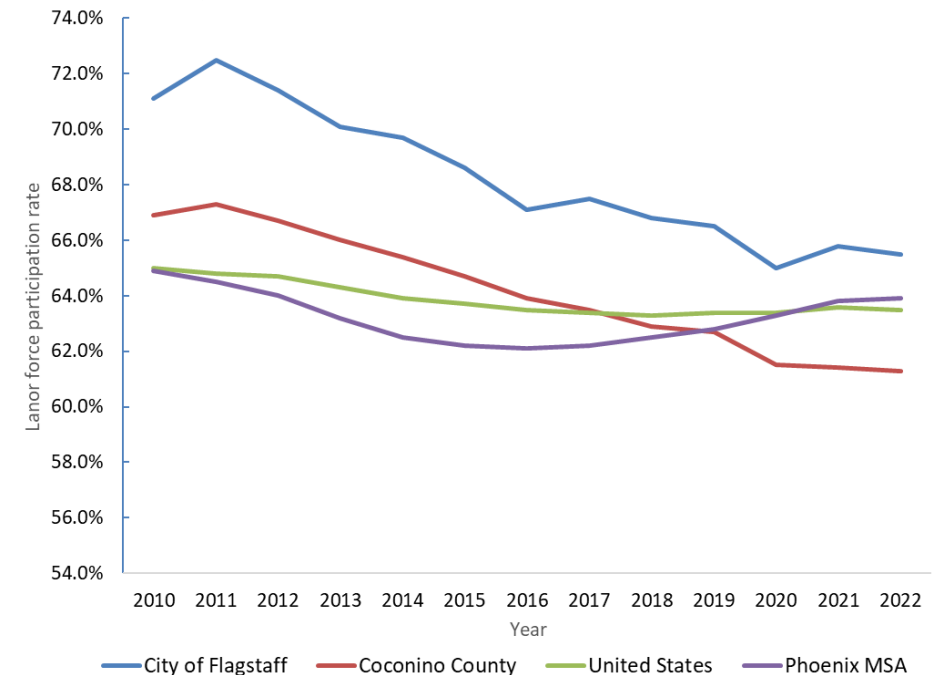
The following sections provide detail on current labor force participation rates and trends within Coconino County.

Trends in Labor Force Participation Compared to Phoenix MSA and the United States

Keen Independent analyzed labor force participation rates for the City of Flagstaff, Coconino County, Phoenix Metropolitan Statistical Area (MSA) and United States using ACS 5-Year Estimates from the U.S. Census Bureau from 2010 to 2022.

In 2022, the labor force participation rate for people living in the City of Flagstaff and Coconino County were 65.5 percent and 61.3 percent, respectively (compared to 63.9 percent for Phoenix MSA and 63.5 percent of the U.S.). Labor force participation has steadily decreased in the City of Flagstaff over the last decade, but is still higher than the County, the Phoenix MSA and the United States (see Figure A-5). (Note that the 5-year estimates somewhat smoothed out the short-term dip in labor force participation in the COVID-19 pandemic.)

A-5. Labor force participation rates, 2010-2022



Source: U.S. Census Bureau, American Community Survey 5-Year Estimates.

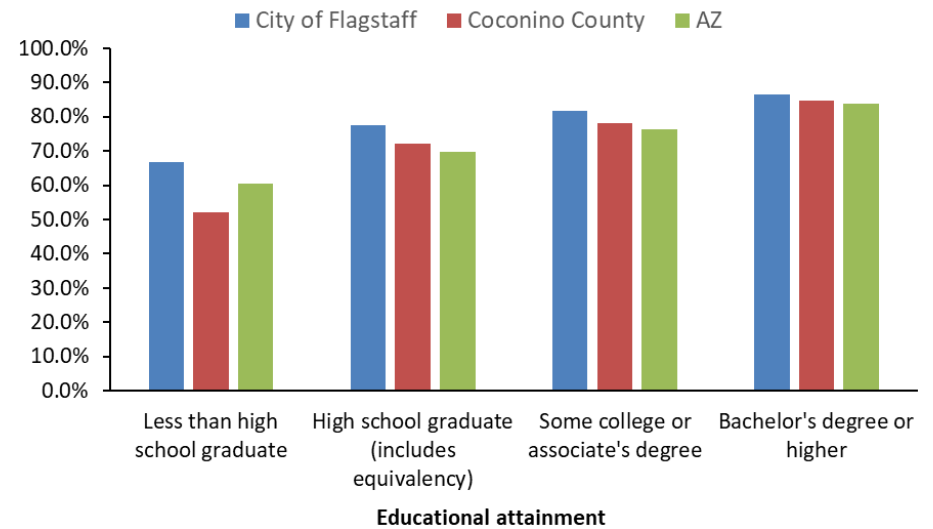
A. Labor Market Trends — Total labor force and employment

Labor Force Participation by Educational Attainment

Labor force participation rates are higher for Flagstaff compared with the county and the state. Also, Flagstaff residents in the working age population who had more education had higher rates of participation in the labor force than those with less education.

Figure A-6 examines the labor force participation rates for different groups for the five years before the COVID-19 Pandemic (2015–2019).

A-6. Labor force participation by educational attainment, 2015-2019



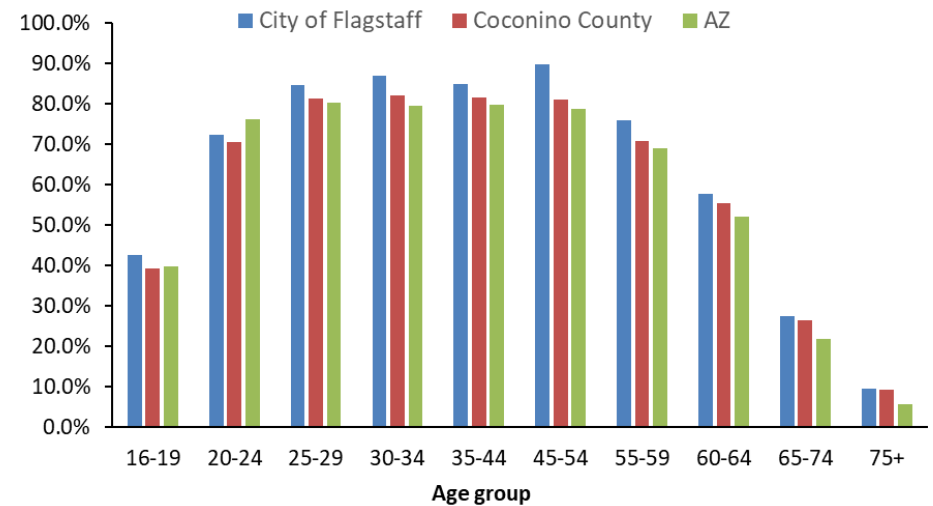
Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2015-2019.

A. Labor Market Trends — Total labor force and employment

Labor Force Participation by Age

In Coconino County the 30-34 age group had the highest labor force participation rate (82%) for 2015-2019. However, individuals 25-54 had very similar participation rates. Participation rates were the lowest for those 19 and under, as well as those 65+. These results were also seen for the City of Flagstaff and the State of Arizona (see Figure A-7).

A-7. Labor force participation by age group, 2015-2019



Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2015-2019.

A. Labor Market Trends — Total labor force and employment

Keen Independent analyzed historical monthly, seasonally adjusted employment levels for Coconino County from 2010 to 2023. The data were sourced from the Arizona Commerce Authority’s employment estimates.

Trends in Employment in Coconino County

In October 2023, Coconino County had a total employment level of 68,800. Employment has been steadily increasing since spring 2020, reaching levels similar to those before the pandemic.

Figure A-8 shows these results.

A-8. Coconino County employment level (seasonally adjusted), 2010-2023



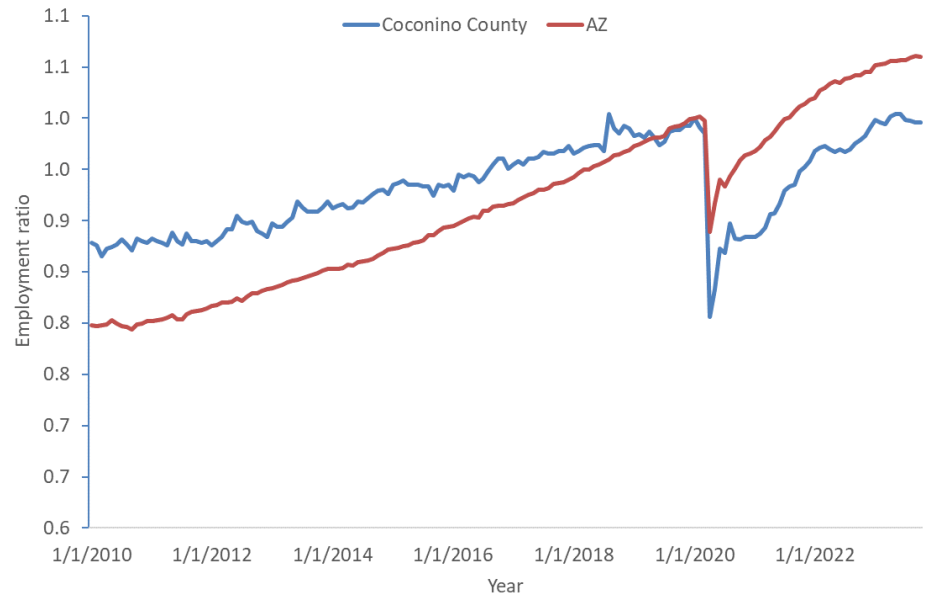
Source: AZ Commerce Authority, Labor Market: Industry Employment and Wages Datasets.

A. Labor Market Trends — Total labor force and employment

Keen Independent also compared trends in total Coconino County employment to those for Arizona. To do so, Keen Independent calculated a ratio of the employment level for a given month divided by the respective employment in January 2020.

Figure A-9 shows the trend for Coconino County and Arizona employment ratios (with January 2020 equal to 1.0). County employment grew more slowly than the state until spring 2020, and then experienced a much greater relative drop in employment during the pandemic. Statewide employment returned to its pre-pandemic employment levels much more quickly than the county.

A-9. Seasonally adjusted employment ratios (base = Jan. 2020), 2010-2023



Source: AZ Commerce Authority, Labor Market: Industry Employment and Wages Datasets.

A. Labor Market Trends — Total labor force and employment

Keen Independent analyzed current and projected employment levels by industry. Findings are described in the following pages.

Current Employment and Employment Projections by Industry Sector

The Arizona Commerce Authority provides current employment levels and projections at the industry level. Keen Independent analyzed the figures from 2022 and compared them to the industry projections for 2032. Figure A-10 shows these results.

In Coconino County in 2022, the following industries had the highest levels of employment:

- Leisure and hospitality (17,131 employees);
- Education and health services (16,661 employees); and
- Trade transportation and utilities (10,200 employees).

These industries accounted for more than one-half of jobs in Coconino County and are also expected to be the biggest industries in 2032. Other industries anticipated to have significant employment increases from 2022 to 2032 are:

- Professional and business services, gaining 1,517 jobs (33% increase); and
- Construction, gaining 639 jobs (21% increase).

Two industries are projected to show job losses: the Self Employed and Government sectors (decreasing by 6.3% and 1.2%, respectively).

A-10. Coconino County 2022 and 2032 employment by industry

Coconino County	2022 Employment	2032 Employment	Percentage change	Numeric change
Industry				
Leisure and Hospitality	17,131	19,120	11.6 %	1,989
Education and Health Services	16,661	18,128	8.8	1,467
Trade Transportation and Utilities	10,200	10,907	6.9	707
Professional and Business Services	4,638	6,155	32.7	1,517
Self Employed	4,568	4,282	-6.3	-286
Government	4,215	4,163	-1.2	-52
Manufacturing	3,482	3,525	1.2	43
Construction	2,983	3,622	21.4	639
Other Services	2,395	2,429	1.4	34
Financial Activities	1,700	1,938	14.0	238
Information	543	646	19.0	103
Natural Resources and Mining	233	286	22.7	53
Total	68,749	75,201	100.0 %	6,452

Source: Arizona Commerce Authority, Employment Industry Projections.

A. Labor Market Trends — Total labor force and employment

Current Employment by Industry Sector in Coconino County Compared to Phoenix MSA

Keen Independent compared the share of jobs in Coconino County by industry to the share in the Phoenix MSA. In the following pages, Figures A-11 and A-12 show the share of employment in each industry for the county and the Phoenix MSA for 2022.²

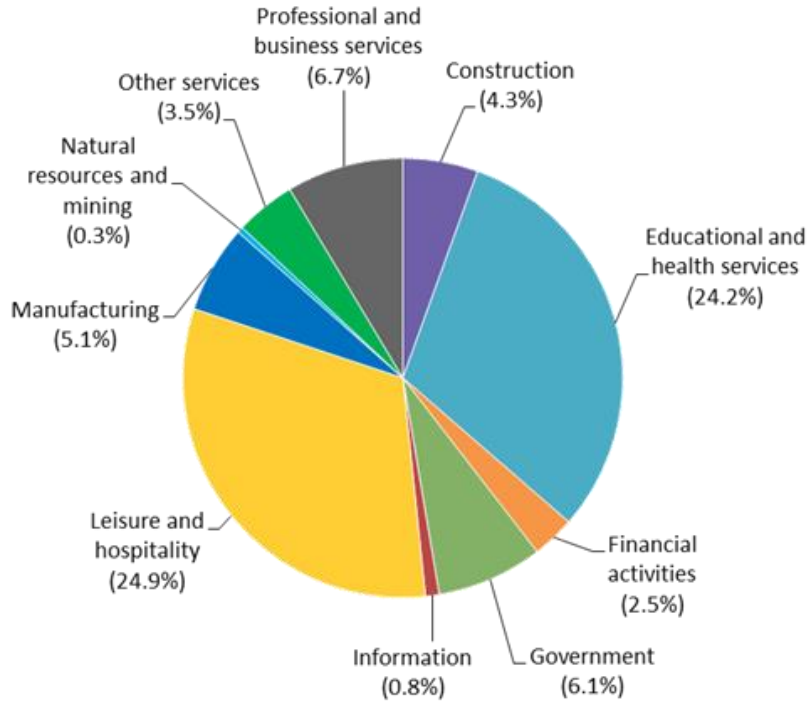
Many of the industries present in the Phoenix MSA are also found in the county. (Analyses later in this appendix show this is also true for specific types of jobs.) However, the relative importance of the sectors differs.

- As mentioned in the previous section, the county’s major industries are leisure and hospitality and educational and health services. The share of the total workforce in these industries in Phoenix MSA is substantially smaller.
- In comparison to Phoenix MSA, the share of the county workforce in Coconino County within the professional and business services, financial activities and construction industries was smaller.

² Arizona Commerce Authority, Employment Industry Projections, accessed via: <https://www.azcommerce.com/oeo/labor-market/employment-projections/>

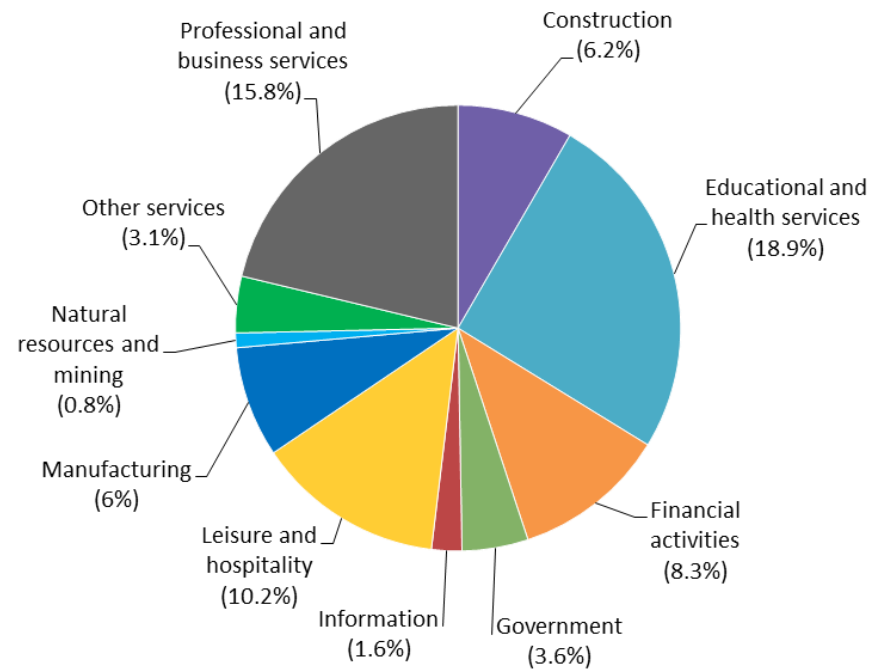
A. Labor Market Trends — Total labor force and employment

A-11. Coconino County workforce breakdown by industry, 2022



Source: Arizona Commerce Authority, Employment Industry Projections

A-12. Phoenix MSA workforce breakdown by industry, 2022



Source: Arizona Commerce Authority, Employment Industry Projections

A. Labor Market Trends — Total labor force and employment

High Location Quotient Industries

Employment Location Quotients (LQs) are a more sophisticated way to compare an industry’s share of total employment in a region to the that for the U.S. For example, if the share of the county’s employment made up by the construction industry was 10 percent and the share of U.S. employment in that same industry was 5 percent, the LQ for that industry for the county would be 2.0. Any ratio greater than 1.0 indicates that the industry has a higher share of employment compared to the U.S.

Coconino County employment LQs. Keen Independent analyzed LQs for private sector June 2023 employment from the Bureau of Labor Statistics. For Coconino County, the three highest June 2023 employment LQs were for the following industries:

- Accommodation and food services (ratio of 2.40);
- Arts, entertainment, and recreation (ratio of 2.17); and
- Retail trade (ratio of 1.08).

In comparison to their share of U.S. employment, these industries made up a larger share of Coconino County employment, indicating that the county has a specialization in these industries when compared to the nation (see Figure A-13). All other industries had an LQ below 1.0.

A-13. June 2023 employment LQs by industry, Coconino County

NAICS industry sector	June 2023 employment location quotient
NAICS 11 Agriculture, forestry, fishing and hunting	0.25
NAICS 21 Mining, quarrying, and oil and gas extraction	0.18
NAICS 22 Utilities	0.80
NAICS 23 Construction	0.87
NAICS 31-33 Manufacturing	0.74
NAICS 42 Wholesale trade	0.37
NAICS 44-45 Retail trade	1.08
NAICS 48-49 Transportation and warehousing	0.43
NAICS 51 Information	0.33
NAICS 52 Finance and insurance	0.27
NAICS 53 Real estate and rental and leasing	0.72
NAICS 54 Professional, scientific, and technical services	0.39
NAICS 55 Management of companies and enterprises	0.50
NAICS 56 Administrative and support and waste management and remediation services	0.45
NAICS 61 Educational services	0.43
NAICS 62 Health care and social assistance	0.98
NAICS 71 Arts, entertainment, and recreation	2.17
NAICS 72 Accommodation and food services	2.40
NAICS 81 Other services (except public administration)	0.81

Source: Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages Data Viewer

A. Labor Market Trends — Total labor force and employment

Keen Independent also reviewed employment levels and projections at the occupation level. Findings are described in the following sections.

Current Employment and Employment Projections by Occupation

The Arizona Commerce Authority also provides current employment levels, as well as 2032 projections for occupations within the industries mentioned in the previous section.

Occupational mix. First, data on employment by occupation shows that the county has most of the same types of jobs found in the Phoenix metro area, but a somewhat different mix of them that follows the differences in share of total employment by industry.

Occupations projected to have the most growth. Keen Independent analyzed the 30 occupations that were expected to have the highest percentage change in county employment levels between 2022 and 2032 (see Figure A-14 on the following page). For the county, the occupations with the greatest expected percentage increases were:

- Nurse practitioners (53% increase);
- Personal financial advisors (49% increase);
- Travel agents (42% increase);
- Veterinary assistants (40% increase); and
- Medical and health services managers (39% increase).

In comparison, the expected percentage change in employment for occupations overall was about 9 percent.

Out of the top 30 occupations analyzed, about one-third were part of a healthcare related occupation group. The next most common occupation groups included sales and related occupations, as well as construction and extraction services.

In addition to changes in employment, Keen Independent identified the typical education levels for individuals who were employed in these occupations. Out of the 30 highest-growth occupations:

- About one-third had a current workforce with a typical education level of a bachelor's degree or higher; and
- Approximately one out of five occupations had a current workforce with a typical education level of an associate's degree or a post-secondary non-degree awarded.³

³ Arizona Commerce Authority, Employment Occupation Projections, accessed via: <https://www.azcommerce.com/oeo/labor-market/employment-projections/>

A. Labor Market Trends — Total labor force and employment

A-14. Occupations with highest projected employment increases, 2022 to 2032

Coconino County		2022 Employment	2032 Employment	Percentage change	Typical education level
Occupation group	Minor occupation				
Healthcare Practitioners and Technical	Nurse Practitioners	192	293	52.6 %	Master's degree
Business and Financial Operations	Personal Financial Advisors	81	121	49.4	Bachelor's degree
Sales and Related	Travel Agents	83	118	42.2	High school diploma or equivalent
Healthcare Support	Veterinary Assistants and Laboratory Animal Caretakers	50	70	40.0	High school diploma or equivalent
Management	Medical and Health Services Managers	268	372	38.8	Bachelor's degree
Healthcare Practitioners and Technical	Veterinary Technologists and Technicians	87	120	37.9	Associate degree
Food Preparation and Serving Related	Cooks, Restaurant	1,154	1,577	36.7	No formal educational credential
Production	Light Truck Drivers	319	434	36.1	High school diploma or equivalent
Healthcare Practitioners and Technical	Physician Assistants	93	125	34.4	Master's degree
Computer and Mathematical	Software Developers	160	211	31.9	Bachelor's degree
Healthcare Practitioners and Technical	Psychiatric Technicians	89	117	31.5	Postsecondary non-degree award
Installation, Maintenance, and Repair	Telecommunications Equipment Installers and Repairers, Except Line Installers	66	86	30.3	Postsecondary non-degree award
Sales and Related	Insurance Sales Agents	140	180	28.6	High school diploma or equivalent
Farming, Fishing, and Forestry	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	96	122	27.1	No formal educational credential
Construction and Extraction	Electricians	263	332	26.2	High school diploma or equivalent
Healthcare Support	Home Health and Personal Care Aides	1,073	1,338	24.7	High school diploma or equivalent
Construction and Extraction	Brickmasons and Blockmasons	50	62	24.0	High school diploma or equivalent
Business and Financial Operations	Financial and Investment Analysts	64	79	23.4	Bachelor's degree
Community and Social Service	Substance Abuse, Behavioral Disorder, and Mental Health Counselors	158	194	22.8	Bachelor's degree
Healthcare Practitioners and Technical	Speech-Language Pathologists	62	76	22.6	Master's degree
Sales and Related	Demonstrators and Product Promoters	102	125	22.5	No formal educational credential
Healthcare Support	Nursing Assistants	407	497	22.1	Postsecondary non-degree award
Community and Social Service	Healthcare Social Workers	64	78	21.9	Master's degree
Installation, Maintenance, and Repair	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	110	134	21.8	Postsecondary non-degree award
Healthcare Support	Massage Therapists	98	119	21.4	Postsecondary non-degree award
Personal Care and Service	Tour and Travel Guides	389	471	21.1	High school diploma or equivalent
Sales and Related	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	299	361	20.7	High school diploma or equivalent
Construction and Extraction	Drywall and Ceiling Tile Installers	58	70	20.7	No formal educational credential
Production	Driver/Sales Workers	308	371	20.5	High school diploma or equivalent
Personal Care and Service	Animal Caretakers	193	232	20.2	High school diploma or equivalent

Source: Arizona Commerce Authority, Employment Occupation Projections

A. Labor Market Trends — Unemployment

The following sections provide detail on current unemployment rates and unemployment trends for Coconino County.

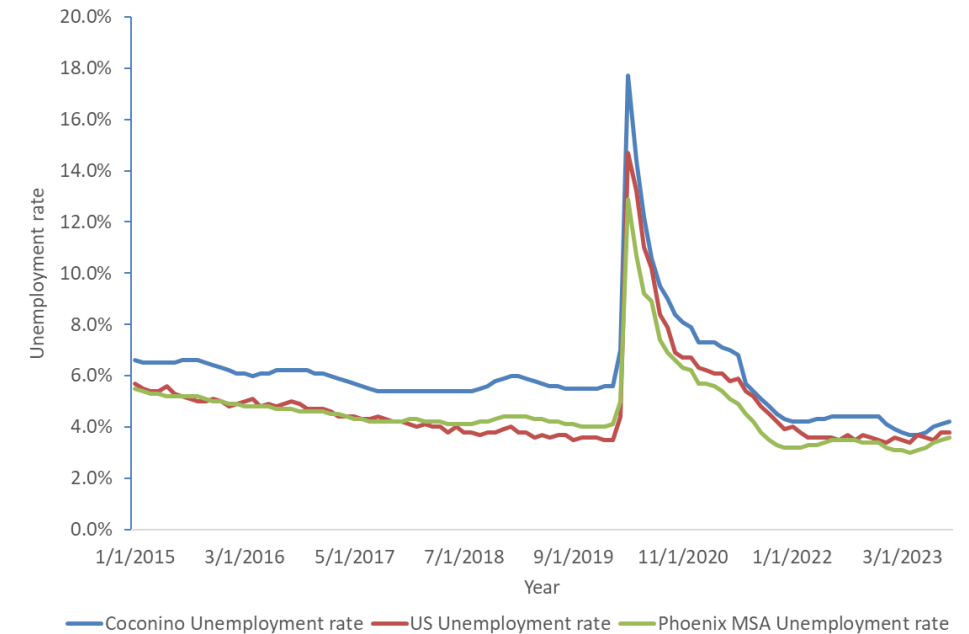
Trends in Unemployment Compared to Phoenix MSA and the United States

For October 2023, the Arizona Commerce Authority reported an unemployment rate for Coconino County of 4.4 percent. That meant that 4.4 percent of people in the labor force in the county were unemployed in that month (totaling to about 3,400 unemployed individuals). This was higher than the unemployment rate in that month for the U.S. as a whole (3.9%) and the Phoenix metropolitan area (3.7%).

Figure A-15 compares unemployment rates for the county, state and U.S. Unemployment in the county follows statewide and national trends and is usually somewhat higher than the state or nation.

Unemployment in Coconino County (seasonally adjusted) reached 17.76 percent with the COVID-19 pandemic but is now lower than pre-pandemic levels. As shown in Figure A-15, the unemployment rate in the county in 2023 was closer to state and U.S. levels than it was prior to the pandemic.

A-15. Monthly unemployment rate (seasonally adjusted), 2015-2023



Source: Arizona Commerce Authority, Labor Market Unemployment Datasets

A. Labor Market Trends — Unemployment by group

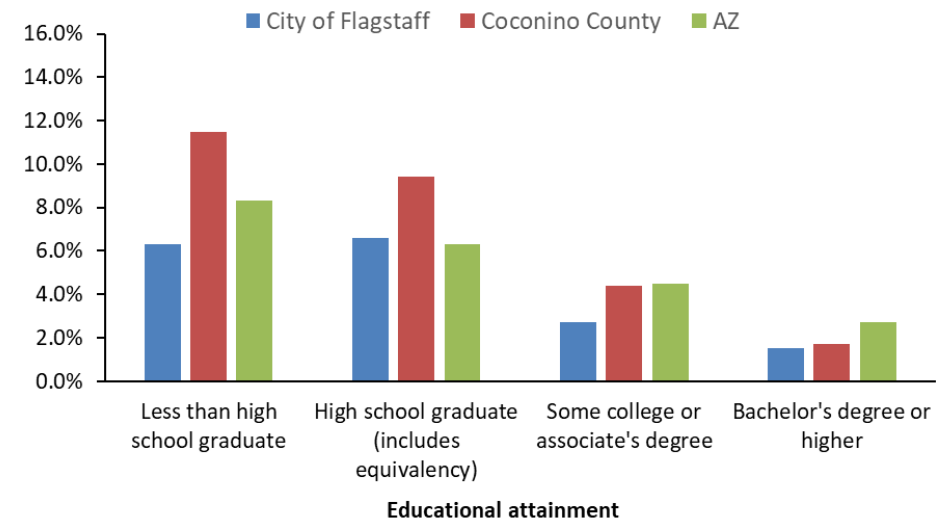
Unemployment by Educational Attainment

Keen Independent examined the unemployment rates for different groups for the five years before the COVID-19 Pandemic (2015–2019). Figure A-16 presents these results.

Unemployment rates vary considerably for individuals with different levels of formal education:

- About 6 percent of people living in Flagstaff who were in the labor force and had less than a high school education were unemployed, along with 7 percent of the labor force who were high school graduates.
- The unemployment rate for Flagstaff residents was only 3 percent for those with some college education or an associate degree and 2 percent for those with a bachelor’s degree or higher.

A-16. Unemployment rate by educational attainment, 2015-2019



Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2015-2019

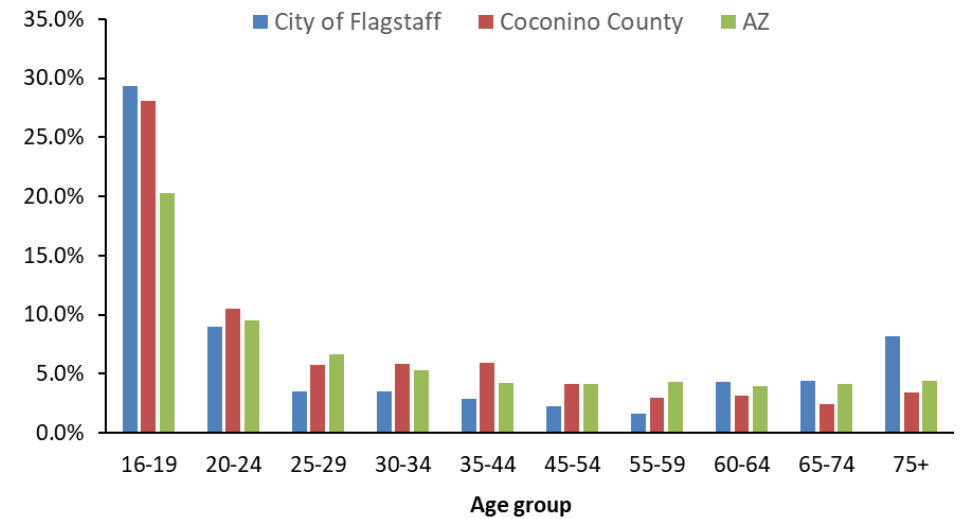
A. Labor Market Trends — Unemployment by group

Unemployment by Age

Consistent with differences in unemployment rates by education, the age groups with the highest rates of unemployment in Coconino County for 2015–2019 were those ages 16 to 19 (counting only those in the workforce), dropping substantially for those ages 25 and older.

Figure A-17 provides these comparisons using American Community Survey data for the five years ending in 2019.

A-17. Unemployment rate by age group, 2015-2019



Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2015-2019

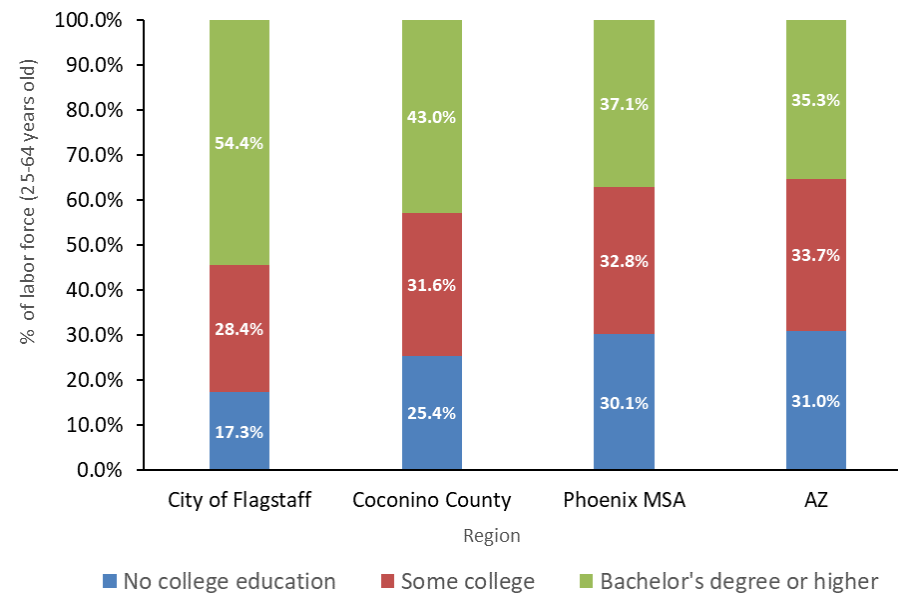
A. Labor Market Trends — Labor force education

Educational attainment of the labor force

Keen Independent analyzed the educational attainment of the labor force for residents of Flagstaff, Coconino County, the Phoenix MSA and Arizona. Data from ACS 2018-2022 estimates were utilized to calculate the percentage of the labor force (ages 25-64 years old) that had a bachelor's degree or higher, some college education, or no college education.

The results in Figure A-18 show that workers in Flagstaff and Coconino County (54% and 43%, respectively) had much higher percentages of the labor force with a bachelor's degree or higher than the Phoenix MSA (37%) or Arizona (35%).

A-18. Educational attainment of the labor force (25-64 years old), 2015-2019



Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2015-2019

A. Labor Market Trends — Labor force education

Fields of Education for Individuals with a Bachelor's Degree

Keen Independent analyzed the fields of education for individuals with a bachelor's degree living in Coconino County compared with those living in the Phoenix metro area. Figures A-19 and A-20 in the following pages show these breakdowns.

The same types of bachelor's degrees found for Phoenix metro area residents are also found in Coconino County, but the distribution differs. In Coconino County, the most common degrees for those with a bachelor's degree were:

- Education (14.7%);
- Business (12.5%); and
- Science and engineering related fields (9.2%)⁴.

In Phoenix MSA, the following fields of education were the largest:

- Business (22.7%);
- Education (12.9%); and
- Science and engineering related fields (10.0%)

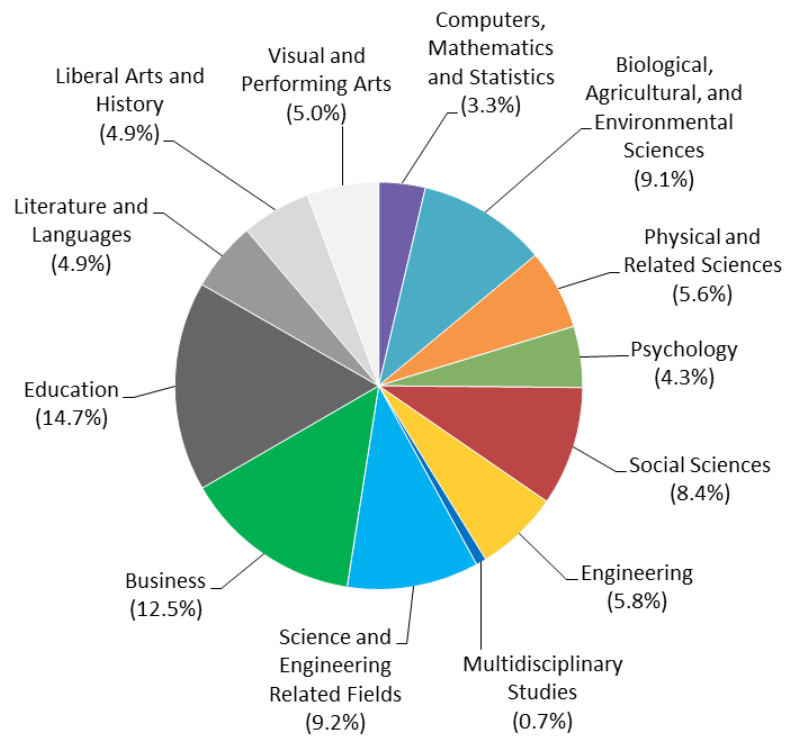
The biggest difference in bachelor's degrees was for business, just 12.5 percent of Coconino County residents with a college degree having a business degree compared with 22.7 percent of Phoenix metro area residents with a college degree. Among county residents with a bachelor's degree, only 5.8 percent had a degree in engineering compared with 8.3 percent for the Phoenix metro area.

⁴ Science and engineering related fields excludes the following education fields: Computers, Mathematics and Statistics, Biological, Agricultural, and Environmental

Sciences, Physical and Related Sciences, Psychology, Social Sciences, Engineering and Multidisciplinary Studies.

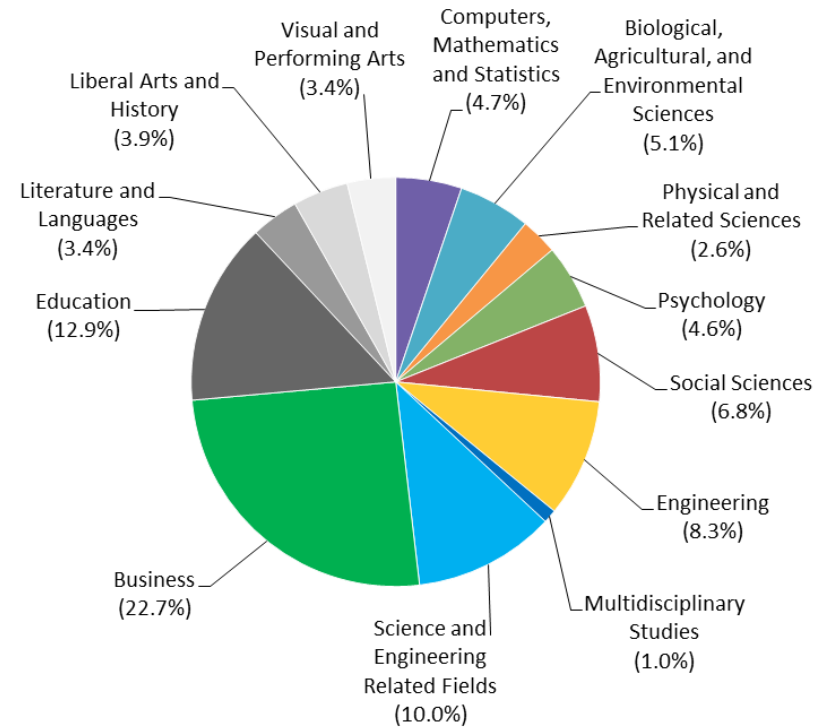
A. Labor Market Trends — Labor force education

A-19. Fields of education for the population with a bachelor's degree, Coconino County, 2015-2019



Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2015-2019

A-20. Fields of education for the population with a bachelor's degree, Phoenix MSA, 2015-2019



Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2015-2019

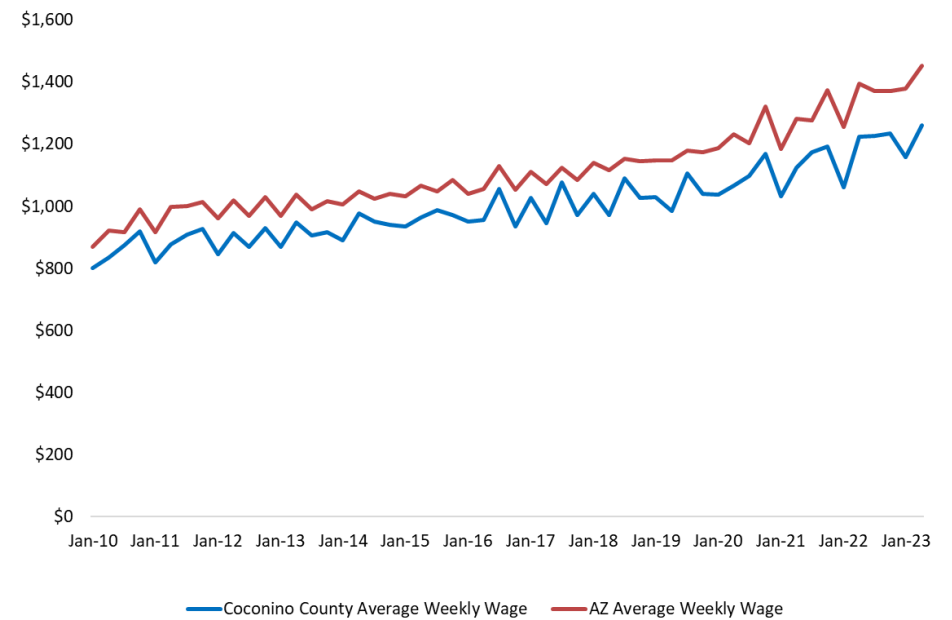
A. Labor Market Trends — Wage levels of workers

Trends in Average Weekly Wages for Coconino County Compared to Arizona

In Quarter 2 of 2023, the Arizona Commerce Authority reported a total employment average weekly wage in Coconino County of \$1,260. This was lower than the average weekly wage for Arizona (\$1,454).⁵

Data from 2010 to 2023 show that both the state and county average weekly wages have been steadily increasing. However, Coconino County's average weekly wage has consistently been below those of the state (see Figure A-21).

A-21. Quarterly average weekly wage levels, 2010 to 2023



Source: Arizona Commerce Authority, Industry Employment and Wages: Quarterly Census of Employment and Wages

⁵ Note that comparable data for the Phoenix MSA was not available.

A. Labor Market Trends — Wage levels of workers

Weekly Wages by Employment Sector

In addition to overall average weekly wage levels, Keen Independent analyzed wages for individual industries.

The Arizona Commerce Authority provides average weekly wages for industries every quarter. Keen Independent analyzed the available data for Q2 2023.

Highest weekly wages. Out of 46 industries reported, the ones with the highest levels in average weekly wages were:

- Insurance carriers and related activities (\$1,970);
- Justice, public order and safety activities (\$1,877);
- Professional and technical services (\$1,690);
- Support activities for transportation (\$1,675); and
- Administration of human resource programs (\$1,483).

Lowest weekly wages. The industries with the lowest average weekly wages were:

- Food and beverage stores (\$617);
- Accommodation (\$613);
- Social assistance (\$605);
- Food services and drinking places (\$544); and
- Motion picture and sound recording industries (\$539)

These results for the lowest-wage industries are notable because of the large number of accommodation and food services and drinking places jobs in the county.

Figure A-22 shows the average weekly wages for the 46 industries.

A. Labor Market Trends — Wage levels of workers

A-22. Average weekly wages by industry, Coconino County, Q2 2023

Industry sector	Industry	Average weekly wage
Finance and insurance	Insurance carriers and related activities	\$ 1,970
Public administration	Justice, public order, and safety activities	1,877
Professional and technical services	Professional and technical services	1,690
Transportation and warehousing	Support activities for transportation	1,675
Public administration	Administration of human resource programs	1,483
Wholesale trade	Merchant wholesalers, durable goods	1,418
Manufacturing	Machinery manufacturing	1,391
Manufacturing	Food manufacturing	1,382
Transportation and warehousing	Truck transportation	1,382
Construction	Heavy and civil engineering construction	1,380
Information	Telecommunications	1,372
Manufacturing	Nonmetallic mineral product manufacturing	1,370
Public administration	Administration of environmental programs	1,365
Utilities	Utilities	1,328
Administrative and waste services	Waste management and remediation services	1,277
Public administration	Executive, legislative and general government	1,238
Retail trade	Motor vehicle and parts dealers	1,220
Arts, entertainment and recreation	Museums, historical sites, zoos, and parks	1,207
Transportation and warehousing	Postal service	1,203
Health care and social assistance	Ambulatory health care services	1,181
Other services, except public administration	Membership associations and organizations	1,130
Construction	Construction of buildings	1,106
Manufacturing	Transportation equipment manufacturing	1,079

Source: Arizona Commerce Authority, Industry Employment and Wages: Quarterly Census of Employment and Wages

A. Labor Market Trends — Wage levels of workers

A-22. Average weekly wages by industry, Coconino County, Q2 2023 (continued)

Industry sector	Industry	Average weekly wage
Transportation and warehousing	Transit and ground passenger transportation	\$ 1,047
Real estate and rental and leasing	Real estate	1,037
Management of companies and enterprises	Management of companies and enterprises	1,032
Construction	Specialty trade contractors	1,016
Other services, except public administration	Repair and maintenance	986
Wholesale trade	Merchant wholesalers, nondurable goods	897
Transportation and warehousing	Couriers and messengers	881
Educational services	Educational services	869
Manufacturing	Wood product manufacturing	845
Finance and insurance	Credit intermediation and related activities	792
Agriculture, forestry, fishing and hunting	Animal production and aquaculture	776
Administrative and waste services	Administrative and support services	767
Retail trade	Building material and garden supply stores	749
Arts, entertainment and recreation	Performing arts and spectator sports	729
Other services, except public administration	Personal and laundry services	709
Transportation and warehousing	Scenic and sightseeing transportation	661
Arts, entertainment and recreation	Amusements, gambling, and recreation	660
Manufacturing	Beverage and tobacco product manufacturing	628
Retail trade	Food and beverage stores	617
Accommodation and food services	Accommodation	613
Health care and social assistance	Social assistance	605
Accommodation and food services	Food services and drinking places	544
Information	Motion picture and sound recording industries	539

Source: Arizona Commerce Authority, Industry Employment and Wages: Quarterly Census of Employment and Wages

A. Labor Market Trends — High and low earnings occupations and education

High and Low Earning Occupations and the Typical Education Level of the Workforce

Keen Independent also analyzed the 30 highest and lowest annual earning occupations within Coconino County, using 2022 data from the Arizona Commerce Authority.⁶ Additionally, data from the Bureau of Labor Statistics was utilized to identify the typical education level needed for entry level of the workforce for each of those occupations.⁷ These results are shown in Figure A-23 and Figure A-24 in the following pages.

Highest earning occupations. Overall, the top 30 occupations had median annual earnings of \$78,862 or higher. In terms of education, a majority of the 30 highest earning occupations in Coconino County (approximately two out of three) had a typical education entry level of a bachelor's degree. Another one out of four had a typical education entry level of a master's degree or higher and only one out of ten had a typical education entry level of an associate degree or postsecondary non-degree award or lower.

Based on the 2022 earnings data, the seven highest earning occupations were:

- Biomedical engineers (\$165,541 and typical education level of a bachelor's degree);
- Pharmacists (\$153,480 and typical education level of a doctoral or professional degree);
- Physician Assistants (\$129,987 and typical education level of a master's degree);
- Industrial production managers (\$125,337 and typical education level of a bachelor's degree);
- Nurse practitioners (\$121,009 and a typical education level of a master's degree),
- Chief executives (\$119,437 and a typical education level of a bachelor's degree); and
- Natural sciences managers (\$104,416 and a typical education level of a bachelor's degree).

⁶ Arizona Commerce Authority, 2022 Occupational Employment and Wages, accessed via: <https://www.azcommerce.com/oeo/labor-market/occupation-employment/>

⁷ Employment Projections program, U.S. Bureau of Labor Statistics, accessed via: <https://www.bls.gov/emp/tables/education-and-training-by-occupation.htm>

A. Labor Market Trends — High and low earnings occupations and education

Lowest earning occupations. The 30 lowest occupations (in terms of median annual earnings) were those that earned \$30,457 or below. The typical education level for these occupations was generally a high school diploma (or equivalent) or no formal educational credential. Only one out of ten occupations had a higher typical education level, with the highest among those being an associate degree.

The seven lowest earning occupations on the other hand were:

- Tire repairers and changers (\$29,293 and a typical education level of a high school diploma or equivalent);
- Fast food and counter workers (\$29,258 and a typical education level of no formal educational credential);
- Childcare workers (\$29,212 and a typical education level of a high school diploma or equivalent),
- Teaching assistants, except postsecondary (\$29,207 and typical education level of some college);
- Dietetic technicians (\$28,958 and typical education level of an associate degree);
- Recreation workers (\$28,848 and typical education level of a high school diploma or equivalent); and
- Amusement and recreation attendants (\$28,777 and a typical education level of no formal educational credential).

A. Labor Market Trends — High and low earnings occupations and education

A-23. Highest median annual earnings by occupation, Coconino County, 2022

Coconino County		Median Annual Earnings	Typical Education Level
Occupation Group	Minor Occupation		
Architecture and Engineering Occupations	Biomedical Engineers	\$ 165,541	Bachelor's degree
Healthcare Practitioners and Technical Occupations	Pharmacists	153,480	Doctoral or professional degree
Healthcare Practitioners and Technical Occupations	Physician Assistants	129,987	Master's degree
Management Occupations	Industrial Production Managers	125,337	Bachelor's degree
Healthcare Practitioners and Technical Occupations	Nurse Practitioners	121,009	Master's degree
Management Occupations	Chief Executives	119,437	Bachelor's degree
Management Occupations	Natural Sciences Managers	104,416	Bachelor's degree
Management Occupations	Computer and Information Systems Managers	103,168	Bachelor's degree
Management Occupations	Medical and Health Services Managers	102,911	Bachelor's degree
Life, Physical, and Social Science Occupations	Physical Scientists, All Other	102,044	Bachelor's degree
Architecture and Engineering Occupations	Industrial Engineers	101,016	Bachelor's degree
Management Occupations	Sales Managers	100,861	Bachelor's degree
Management Occupations	Financial Managers	100,563	Bachelor's degree
Computer and Mathematical Occupations	Computer Network Architects	100,554	Bachelor's degree
Education, Training, and Library Occupations	Business Teachers, Postsecondary	98,831	Doctoral or professional degree
Computer and Mathematical Occupations	Computer Programmers	97,708	Bachelor's degree
Legal Occupations	Lawyers	97,681	Doctoral or professional degree
Architecture and Engineering Occupations	Mechanical Engineers	95,784	Bachelor's degree
Healthcare Practitioners and Technical Occupations	Occupational Therapists	95,585	Master's degree
Healthcare Practitioners and Technical Occupations	Physical Therapists	95,585	Doctoral or professional degree
Management Occupations	Human Resources Managers	94,926	Bachelor's degree
Management Occupations	Managers, All Other	94,691	Bachelor's degree
Management Occupations	Marketing Managers	92,526	Bachelor's degree
Protective Service Occupations	First-Line Supervisors of Police and Detectives	90,528	High school diploma or equivalent
Architecture and Engineering Occupations	Civil Engineers	82,638	Bachelor's degree
Management Occupations	Construction Managers	82,009	Bachelor's degree
Transportation and Material Occupations	Commercial Pilots	81,777	Postsecondary nondegree award
Healthcare Practitioners and Technical Occupations	Dental Hygienists	80,210	Associate's degree
Business and Financial Operations Occupations	Compliance Officers	78,891	Bachelor's degree
Legal Occupations	Judges, Magistrate Judges, and Magistrates	78,862	Doctoral or professional degree

Source: Arizona Commerce Authority, 2022 Occupational Employment and Wages

A. Labor Market Trends — High and low earnings occupations and education

A-24. Lowest median annual earnings by occupation, Coconino County, 2022

Coconino County		Median Annual	Typical Education Level
Occupation Group	Minor Occupation		
Food Preparation and Serving-Related Occupations	Cooks, All Other	\$ 30,457	No formal educational credential
Production Occupations	Butchers and Meat Cutters	30,301	No formal educational credential
Transportation and Material Occupations	Stockers and Order Fillers	30,253	High school diploma or equivalent
Food Preparation and Serving-Related Occupations	Food Preparation Workers	30,189	No formal educational credential
Building and Grounds Cleaning and Maintenance Occupations	Maids and Housekeeping Cleaners	29,991	No formal educational credential
Transportation and Material Occupations	Parking Lot Attendants	29,981	No formal educational credential
Production Occupations	Laundry and Dry-Cleaning Workers	29,976	No formal educational credential
Personal Care and Service Occupations	Nonfarm Animal Caretakers	29,966	High school diploma or equivalent
Construction and Extraction Occupations	Fence Erectors	29,963	No formal educational credential
Transportation and Material Occupations	Automotive and Watercraft Service Attendants	29,950	No formal educational credential
Office and Administrative Occupations	Library Assistants, Clerical	29,896	High school diploma or equivalent
Food Preparation and Serving-Related Occupations	Dining Room and Cafeteria Attendants and Bartender Helpers	29,835	No formal educational credential
Sales and Related Occupations	Retail Salespersons	29,807	No formal educational credential
Healthcare Support Occupations	Home Health and Personal Care Aides	29,718	High school diploma or equivalent
Healthcare Support Occupations	Veterinary Assistants and Laboratory Animal Caretakers	29,701	High school diploma or equivalent
Food Preparation and Serving-Related Occupations	Dishwashers	29,624	No formal educational credential
Education, Training, and Library Occupations	Preschool Teachers, Except Special Education	29,618	Associate's degree
Food Preparation and Serving-Related Occupations	Cooks, Fast Food	29,541	No formal educational credential
Transportation and Material Occupations	Cleaners of Vehicles and Equipment	29,541	No formal educational credential
Sales and Related Occupations	Cashiers	29,537	No formal educational credential
Office and Administrative Occupations	Hotel, Motel, and Resort Desk Clerks	29,453	High school diploma or equivalent
Food Preparation and Serving-Related Occupations	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	29,385	No formal educational credential
Arts, Design, Entertainment, Sports, and Media Occupations	Merchandise Displayers and Window Trimmers	29,332	High school diploma or equivalent
Installation, Maintenance, and Repair Occupations	Tire Repairers and Changers	29,293	High school diploma or equivalent
Food Preparation and Serving-Related Occupations	Fast Food and Counter Workers	29,258	No formal educational credential
Personal Care and Service Occupations	Childcare Workers	29,212	High school diploma or equivalent
Education, Training, and Library Occupations	Teaching Assistants, Except Postsecondary	29,207	Some college, no degree
Healthcare Practitioners and Technical Occupations	Dietetic Technicians	28,958	Associate's degree
Personal Care and Service Occupations	Recreation Workers	28,848	High school diploma or equivalent
Personal Care and Service Occupations	Amusement and Recreation Attendants	28,777	No formal educational credential

Source: Arizona Commerce Authority, 2022 Occupational Employment and Wages

A. Labor Market Trends — High and low earnings occupations and education

High Growth, Moderate Wage Occupations that Do Not Require College Degree

Keen Independent identified 25 occupations in Coconino County for which the Arizona Commerce Authority projected the highest growth rates between 2022 and 2032 that we determined had typical education requirements below a bachelor's degree. Keen Independent then considered corresponding median earnings for each of these occupations. Results are shown in Figure A-25 on the following page.

Occupations with high growth projections, no college degree required and relatively high average wages tend to fall into four general groups:

- Light truck drivers (high growth rate, typical formal education of a high school diploma and median annual earnings of \$45,909);
- Healthcare occupations such as practical and vocational nurses, nursing assistants, psychiatric technicians and pharmacy technicians;
- Construction tradespersons such as electricians, telecommunications equipment installers, masons, HVAC mechanics and installers, and plumbers and pipefitters; and
- Sales representatives in fields like travel, services and insurance.

A. Labor Market Trends — High and low earnings occupations and education

A-25. High growth occupations with educational requirements below a bachelor’s degree and median annual earnings, Coconino County, 2022 and 2032

Coconino County		2022 Employment	2032 Employment	Percentage change	Median annual earnings	Typical education level
Occupation group	Minor occupation					
Sales and Related	Travel Agents	83	118	42.2 %	\$ 41,930	High school diploma or equivalent
Healthcare Support	Veterinary Assistants and Laboratory Animal Caretakers	50	70	40.0	29,701	High school diploma or equivalent
Healthcare Practitioners and Technical	Veterinary Technologists and Technicians	87	120	37.9	36,691	Associate degree
Food Preparation and Serving Related	Cooks, Restaurant	1,154	1,577	36.7	30,646	No formal educational credential
Production	Light Truck Drivers	319	434	36.1	45,909	High school diploma or equivalent
Healthcare Practitioners and Technical	Psychiatric Technicians	89	117	31.5	45,909	Postsecondary non-degree award
Installation, Maintenance, and Repair	Telecommunications Equipment Installers and Repairers, Except Line Installers	66	86	30.3	45,909	Postsecondary non-degree award
Sales and Related	Insurance Sales Agents	140	180	28.6	38,493	High school diploma or equivalent
Farming, Fishing, and Forestry	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	96	122	27.1	32,209	No formal educational credential
Construction and Extraction	Electricians	263	332	26.2	48,761	High school diploma or equivalent
Healthcare Support	Home Health and Personal Care Aides	1,073	1,338	24.7	29,718	High school diploma or equivalent
Construction and Extraction	Brickmasons and Blockmasons	50	62	24.0	47,578	High school diploma or equivalent
Healthcare Support	Nursing Assistants	407	497	22.1	37,094	Postsecondary non-degree award
Installation, Maintenance, and Repair	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	110	134	21.8	47,714	Postsecondary non-degree award
Personal Care and Service	Tour and Travel Guides	389	471	21.1	30,738	High school diploma or equivalent
Sales and Related	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	299	361	20.7	61,376	High school diploma or equivalent
Production	Driver/Sales Workers	308	371	20.5	31,002	High school diploma or equivalent
Personal Care and Service	Animal Caretakers	193	232	20.2	29,966	High school diploma or equivalent
Construction and Extraction	Plumbers, Pipefitters, and Steamfitters	187	224	19.8	49,700	High school diploma or equivalent
Food Preparation and Serving Related	First-Line Supervisors of Food Preparation and Serving Workers	873	1,041	19.2	38,587	High school diploma or equivalent
Healthcare Practitioners and Technical	Licensed Practical and Licensed Vocational Nurses	69	82	18.8	60,518	Postsecondary non-degree award
Healthcare Practitioners and Technical	Pharmacy Technicians	134	159	18.7	39,675	High school diploma or equivalent
Production	Laborers and Freight, Stock, and Material Movers, Hand	649	769	18.5	31,209	No formal educational credential
Production	Stockers and Order Fillers	952	1,124	18.1	30,253	High school diploma or equivalent
Food Preparation and Serving Related	Cooks, Institution and Cafeteria	158	186	17.7	32,994	No formal educational credential

Source: Arizona Commerce Authority, 2022 Occupational Employment and Wages
Arizona Commerce Authority, Employment Occupation Projections

APPENDIX B. Workforce Development Programs

In this appendix, Keen Independent provides an overview of workforce development programs and services available to job seekers in the Flagstaff area.

Introduction

Local schools, agencies and organizations operate a wide range of workforce development programs for Flagstaff residents seeking training, continuing education and other career services. Although the following discussion of programs is not exhaustive, it provides many examples of programs that residents of Flagstaff and Coconino County could access.

Appendix B examines workforce development programs in the Flagstaff and Coconino County areas, grouped into three categories:

- Education programs;
- Independent training programs;
- Apprenticeship programs; and
- ARIZONA@WORK programs.

We note that ARIZONA@WORK is the statewide workforce development network and at the local level, consists of providers that offer workforce development services. These providers have contracts with the Coconino County Workforce Development Board, which serves as the steward of Workforce Innovation and Opportunity Act (WIOA) funding. Although we present education and independent training programs separately, many also fall into this local network and are supported by WIOA funding (we note which programs are and are not eligible for WIOA funding).



Source: Gary Dee via Wikimedia Commons.

B. Workforce Development Programs — Education programs

Several opportunities for education and training in post-secondary settings exist in Flagstaff and Coconino County. Northern Arizona University and Coconino County Community College both offer several programs geared towards adult learners and job seekers.

Northern Arizona University

Northern Arizona University (NAU) is a four-year public research university based in Flagstaff, Arizona. NAU supports two main workforce development programs: Career Steps and the Educational Opportunity Centers Program. Additionally, two of NAU's bachelor's degree programs are eligible for County WIOA funding.

Career Steps. Career Steps are online, self-paced modules that cover career related topics and are available to any NAU student. These modules are connected to Udemy, an online learning website that NAU students have access to for free. All modules that are passed with an 80 percent score or higher will result in a Certificate of Completion for that module. In the past year, over 3,000 students and alumni have engaged with the Career Steps program.¹ Examples of modules include:

- Exploring myths and realities of careers;
- Establishing your professional identity;
- Communicating in the workplace;
- Crafting your resume content;
- Accessing the job market; and
- Formulating interview success strategies.

Educational Opportunity Centers Program. The NAU Education Opportunity Centers is a federally funded TRIO program that provides counseling and support to low-income adult participants (age 19 or older) who want to enter or continue a high school equivalent, postsecondary education or a postsecondary credential program.² The main NAU Educational Opportunity Centers is located in Flagstaff and primarily serves residents of Coconino, Apache, Navajo, Mohave or Yavapai counties, although NAU statewide locations exist. Provided services include:

- Referrals to local GED preparation classes;
- Career assessment and exploration;
- Scholarship search and application assistance;
- Financial aid counseling; and
- Referrals to community resources.

WIOA-eligible bachelor's degree programs. Students working toward bachelor's degrees in NAU's Nursing and Computer Information Technology programs may be eligible to receive funding for their programs through WIOA. ARIZONA@WORK lists these programs on its website as approved for WIOA funding and interested students may verify their eligibility via this website.

¹ <https://in.nau.edu/career/career-steps/>

² <https://in.nau.edu/educational-opportunity-centers/eligibility/>

B. Workforce Development Programs — Education programs

Coconino Community College

Coconino Community College (CCC) is a public community college located in Flagstaff, Arizona. CCC has three locations in Coconino County and serves, on average, 2,500 students per semester. Since its founding in 1991, CCC has served over 75,000 students county-wide.³ Overall, CCC has 24 programs that are eligible for WIOA funding.

Small Business Development Center. The Coconino Small Business Development Center (SBDC) provides counseling, training and resources for small businesses throughout Coconino County at two CCC campus locations, one in Flagstaff and one in Page.⁴ Anyone who operates a for profit business or is planning to start a business can register to receive free, confidential business advice from a team of experienced small business experts. Examples of topics the experts can assist with include:

- Business planning;
- Market feasibility and research;
- Start-up guidance;
- Cash flow analysis;
- Identification of potential capital sources;
- SBA Loan Assistance; and
- Diverse business certification.

This program is part of the larger Arizona SBDC Network, a statewide source of assistance for small businesses offered through ten Arizona community college districts, the U.S. Small Business Administration and the U.S. Department of Defense. The AZSBDC Network is fully accredited by the America's SBDC, a national system that connects 63 SBDC networks across the United States.⁵

CCC2Work – Career and Technical Education Program. The Coconino Community College's Career and Technical Education program (CCC2Work) provides eight career pathways, many of which are one- or two-year programs that result in an associate degree or a certificate upon program completion.⁶ The eight pathways are:

- Business and Accounting;
- Computer and Information Technology;
- Early Childhood Education;
- Fire Science;
- GED Prep and ESL;
- Health Services;
- Public Safety; and
- Skilled Trades.

Two of these pathways (GED Prep and ESL and Skilled Trades) are connected to the next two programs.

³ <https://www.coconino.edu/about-us>

⁴ <https://www.coconino.edu/sbdc>

⁵ <https://azsbdc.net/who-we-are/>

⁶ <https://www.coconino.edu/cc2work>

B. Workforce Development Programs — Education programs

Adult Basic Education for College and Careers Program. CCC's Adult Basic Education for College and Careers Program offers free High School Equivalency test preparation and English as a Second Language (ESL) courses. These courses are offered in multiple modalities, such as in-person classes at four Adult Education sites across Coconino County, synchronous virtual classes and asynchronous self-paced online courses. Courses are open to Coconino County residents who are at least 16 years old and legally present in the United States.⁷

Workforce Training. CCC offers a variety of non-credit career courses, meaning the completion of these courses does not apply towards a degree program.⁸ Many of these courses do, however, conclude with a certification if all requirements are met. Classes are offered online and in-person. Examples of workforce training opportunities include:

- Class A Commercial Driver's License training;
- Real estate pre-licensing and continuing education courses;
- Certificate for Apartment Maintenance Technician (CAMT) courses;
- Tour guide training; and
- Production assistant training.

⁷ <https://www.coconino.edu/adult-education>

⁸ <https://www.coconino.edu/workforce-training>

B. Workforce Development Programs — Independent training programs

Here, we review a few examples of independent training programs offered by smaller schools and other individual organizations.

Warrior-to-Inspector

Warrior-to-Inspector is a military transitioning Pipeline Integrity Non-Destructive Testing (NDT) trade school and apprenticeship program based in Flagstaff.⁹ Veterans and civilians are eligible to apply to the 18-month education and training program. The program provides hands-on experience and combines formal classroom training, indoor simulation training and outdoor structured training. The program does not guarantee job placement upon graduation, but claims that historically, one hundred percent of graduates have found related employment upon graduation.

Pre-requisites for enrollment include competencies in mechanical and communication skills, a high school diploma or equivalent and the ability to meet physical requirements. The total estimated cost for the program is \$32,470 and is eligible for WIOA funding.

Northland Hospice and Palliative Care

The Northland Hospice and Palliative Care agency in Flagstaff offers a Certified Caregiver Training program. The program is approved by the Arizona Board of Nursing Care Institution Administrators and Assisted Living Managers and successful completion of an approved program is required to earn a Certified Caregiver certificate in Arizona. This six-week program meets the educational requirements to earn the certification and prepares students to take the State Certification exam. Program costs are estimated to be \$1,132, which includes the cost of

the certification exam. Scholarships, grants and WIOA funding are available to reduce the cost of enrollment for eligible students.

Sedona School of Massage

The Sedona School of Massage offers a five-month, 700-hour massage therapy program that prepares students to take the National Certification Exam and Massage and Bodywork Licensing Exam. The courses cover a range of topics from physiology and kinesiology to business practices. Applicants must have a high school diploma or equivalent. The estimated cost of the program is \$8,000 and no financial aid is currently offered, however, the school does offer no interest payment plans. The curriculum is certified by the Arizona State Board for Private Postsecondary Education and eligible for WIOA funding.

Kuttz Beauty and Barber College

Kuttz Beauty and Barber College, located in Flagstaff, offers an instructional program that prepares students to earn a cosmetology or barber license in Arizona.¹⁰ Students begin with classroom instruction and are then allowed to begin hands-on training while continuing their coursework. Once all training is completed, students have the classes and practice hours required to take the written and practical exams needed to obtain a cosmetology or barber license. Some classes are available online but practice hours must be completed in person.

The cost of the program is estimated to range from \$26,193 to \$29,826 which includes required supplies, fees and the cost of the licensing exam. Financial aid is available to eligible applicants. Nine of the programs offered at Kuttz are eligible for WIOA funding.

⁹ <https://www.war2in.org/>

¹⁰ <https://www.kuttzbarbershop.com/barber-college>

B. Workforce Development Programs — Apprenticeship programs

Two industry-specific apprenticeship programs were found in the Flagstaff area and are discussed in this section.

Northern Arizona Electrical Contractors' Association (NAECA) Apprenticeship Program

The NAECA is a trade association with a mission to further educational training, safety and community within the electrical industry in Northern Arizona. The accredited four-year apprenticeship program prepares apprentices for a career in electrical contracting. Classes associated with the apprenticeship program are taught in-person at Sinagua High School in Flagstaff. The cost of the program is \$895 and it is eligible for WIOA funding.

Boilermakers Western States Apprenticeship Program

Apprentice boilermakers who receive training from the Boilermakers Western States Apprenticeship Program learn about all phases of the erection and repair industry, including reading blueprints, rigging on heavy loads, burning, welding and fabrication of metal parts. Apprentices receive a minimum of 144 hours of classroom training per year, for a total of 576 program hours. Total fees for the program are \$250. The program is not listed as eligible for WIOA funding on the ARIZONA@WORK website.

Those who wish to apply to the program must first complete and pass the required Boilermaker Apprentices online lessons (available online) and must submit a birth certificate and high school diploma or equivalent with their application. All completed applications are entered into a drawing of eligible candidates and randomly picked to participate. Applicants with previous experience or veterans registered with Helmets to Hardhats (a national nonprofit that connects transitioning active-duty military and veterans with training and employment opportunities in construction trades) can increase their chances of being selected by following the procedures to upgrade their status in the Pool of Eligibles. For example, Boilermakers Western States Apprenticeship Program has an agreement with Helmets to Hardhats that 25 percent of placements per drawing will be given to Helmet to Hardhat registered applicants.

B. Workforce Development Programs — ARIZONA@WORK

ARIZONA@WORK Coconino County is the local workforce development network with two offices in Flagstaff. The Coconino County Workforce Development Board oversees ARIZONA@WORK services to ensure alignment with local needs and provides support through federal WIOA funding. ARIZONA@WORK services are available at no cost to job seekers and employers across Arizona.

Career Centers

ARIZONA@WORK Career Centers are designed to provide a multitude of services in one location. There are two career centers in Flagstaff:

- Coconino County Health & Human Services office (2625 North King Street, 2nd Floor Flagstaff AZ 86004); and
- Comprehensive One-Stop at the Department of Economic Security (1701 North Fourth Street Flagstaff AZ 86004).

Examples of services provided include:

- A resource room with computers, printers and other technology needs for job seekers;
- Access to workforce specialists and advisors; and
- Frequent workshops, events and job fairs.

Senior Community Service Employment Program

The Senior Community Service Employment Program (SCSEP) is a federally funded program, authorized by the Older Americans Act in 1965, that assists low-income, unemployed adults aged 55 and older with job training opportunities that help develop the skills and experience needed to find permanent employment. Enrollment priority is given to members of historically minoritized racial and ethnic groups, limited English speaking individuals and those with greatest economic and special employment needs.¹¹

Participants in the program receive work-based job training for an average of 20 hours per week at local nonprofit and public facilities and are paid minimum wage (currently \$17.40 per hour in Flagstaff) through grant sponsored funding. While engaging in these opportunities, participants receive supervised training on developing or improving existing employment skills, accessing educational opportunities and job search skills. Participants also receive an assessment to determine their individual training, support services and employment needs.

The National Indian Council on Aging (NICOA) was awarded additional funding as a set-aside grantee for this program in 1989. NICOA operates in seven states, including Arizona. Individuals of any racial or ethnic background who are eligible to participate in the SCSEP can apply through NICOA.

¹¹ <https://des.az.gov/services/older-adults/senior-community-service-employment-program>

B. Workforce Development Programs — ARIZONA@WORK

Phoenix Indian Center

The Phoenix Indian Center has two locations, one in Phoenix and one in Flagstaff. The Flagstaff office is co-located with the Native Americans for Community Action organization, which provides community health resources. The Phoenix Indian Centers provide a range of services, including workforce development. These centers provide training opportunities, career coaching, career forecasting information and employment resources, as well as regularly hosting job fairs and hiring events.

Those interested in receiving services begin by filling out an application and meeting with a Workforce Specialist to determine program eligibility. There is no cost to apply or to participate in the program. Many of the hiring events and some virtual training opportunities are free and available to all.

Reemployment Services and Eligibility Assessment

The Arizona Department of Economic Security Reemployment Services and Eligibility Assessment (RESEA) program assists those collecting Unemployment Insurance benefits with becoming reemployed. RESEA participants have one-on-one meetings with an assigned workforce specialist and receive assessments, reviews of work search activities and an individualized employment plan.

Participation in this program is mandatory for all selected Unemployment Insurance participants and refusal to participate if selected can result in the suspension of Unemployment Insurance.

Trade Adjustment Assistance

Another federal program administered by the Arizona Department of Economic Security through ARIZONA@WORK is the Trade Adjustment Assistance (TAA) program. TAA offers training and employment opportunities to those who have lost work due to outsourcing or foreign trade. Services provided to TAA-certified workers may include:

- Access to reemployment services;
- Occupational or on-the-job training;
- Continuing education;
- Income support;
- Wage subsidy for workers 50 years old or older;
- Job search allowance;
- Relocation allowance; and
- Health Coverage Tax Credit.

To participate in TAA, a petition must be filed with the U.S. Department of Labor and the Arizona Trade Coordinator by or on behalf of a group of workers who have lost their jobs as a result of foreign trade.¹² TAA Counselors are available to provide assistance, if needed.

¹² <https://des.az.gov/services/employment/job-seekers/trade-adjustment-assistance>

B. Workforce Development Programs — ARIZONA@WORK

Vocational Rehabilitation Services

The Vocational Rehabilitation program assists persons with disabilities as they prepare for, enter into or retain employment. The program provides a variety of services, such as:

- Vocational evaluation;
- Job training;
- Job search assistance;
- Job placement;
- Transportation;
- Job site modification; and
- Self-employment and entrepreneurial activities.

Applications can be submitted online or at a Vocational Rehabilitation office. To be eligible for this program, individuals must:

- Have a physical or mental impairment that results in a substantial impediment to employment;
- Require services to prepare for, secure, retain or regain employment; and
- Be able to benefit from the services by achieving employment.

Disabled Veterans Outreach Program

The Disabled Veterans Outreach Program (DVOP) provides specialized, intensive services to disabled veterans, non-disabled veterans and eligible spouses of veterans with priority given to those who have significant barriers to employment such as homelessness, recent incarceration or not having a high school diploma or equivalent certificate. A federal program that is locally operated by the Arizona Department of Economic Security, DVOP services include:

- Assessments;
- Employment plans;
- Career guidance;
- Referral to supportive services; and
- Connections to job openings.

APPENDIX C. Stakeholder Input

This appendix summarizes input from Flagstaff area stakeholders regarding the local labor market and workforce development.

Methodology

Keen Independent conducted interviews and focus groups with Flagstaff stakeholder, which included:

- Local business owners and company representatives;
- City staff;
- Coconino County Workforce Development Board members;
- City of Flagstaff elected officials;
- Higher education administrators (university and community college); and
- K-12 administrators.

In-depth interviews. Some of the input discussed in this appendix comes from interviews with 11 individuals. We identified and contacted interviewees based on a list that was provided by the City of Flagstaff. The study team also asked all interviewees if there were others to whom we should speak as part of this assessment and identified other interview candidates from those responses.

All interviews were conducted via Zoom. We used a semi-structured approach in the interviews, providing a framework for discussion and allowing participants to steer the conversation into areas they found relevant or of interest.

Focus groups. Keen Independent hosted three virtual focus groups of 10 total individuals knowledgeable about the Flagstaff workforce and workforce development. Like the interviews, these sessions followed a semi-structured format.

Topics

The interviews and focus groups included the following pre-determined topics as well as general themes that emerged during the discussions with stakeholders:

- Descriptions of the Flagstaff workforce;
- Challenges for employers and employees;
- Existing and desired workforce development services and programs; and
- Ways the City can support the local workforce.

C. Stakeholder Input — Descriptions of the Flagstaff workforce

As an introductory exercise, Keen Independent prompted many stakeholders to provide descriptions of the Flagstaff workforce.

Education

When describing the workforce, many stakeholders centered education as a key feature in Flagstaff due to the presence of high-quality educational institutions like Northern Arizona University (NAU) and Coconino Community College (CCC).

Culture of four-year college degrees. A few stakeholders described Flagstaff as a community that prioritizes four-year and advanced college degrees to the detriment of certifications or trade skills.

Disconnect between educational institutions and employers. A few stakeholders described how the educational institutions are not able to meet the immediate needs of employers in Flagstaff.

We've got a lot going on here in terms of research and scientific discovery. I think we have a strong arts and culture ... that I see as complementing the scientific discovery section of our community.

City elected official

We're a small town ... with a great university, a great community college. And so, I would say we have a very highly skilled workforce, very educated workforce. But I think we're kind of missing that like middle ground.

Higher education professional

Not everybody has to go to a four-year college. You can get certificates in different areas that are highly needed.

City elected official

The disconnect in Northern Arizona is that you have a handful of major employers who [have] workforce needs, right? And you have these great educational institutions ... the educators are going to say, "We can do this for you, give us 12 to 18 months." And then the employers are going to say, "No way are we waiting 12 to 18 months. We need this now."

Workforce professional

C. Stakeholder Input — Descriptions of the Flagstaff workforce

Employment

Stakeholders also described their impressions of employment in Flagstaff and previewed a few topics that would later be discussed as barriers for employers and job seekers.

Worker shortages. Several stakeholders described the workforce as missing crucial segments, including:

- Workers with specialized skill sets requiring an advanced college degree;
- Workers with specialized skill sets that do not require a college degree; and
- Workers with skill sets in between the highly skilled workers and minimum wage job workers.

Skill gaps. Additionally, a few stakeholders mentioned that workers, particularly those concentrated in minimum wage jobs, were lacking in soft skills that could help them obtain and retain employment.

Limited availability of well-paying jobs. Many stakeholders mentioned that minimum wage jobs are readily available due to the size of the hospitality industry in Flagstaff, but relatively few job opportunities offer a sustainable wage. A few commented that job training in Flagstaff and Coconino County as a whole is not helping many people obtain careers that offer economic self-sufficiency because there are not many such job options available.

We're doing well when it comes to the nurses and EMTs and some of these more specific or, needing like a bachelor's degree or above.

Higher education professional

Within the City, of course, we have a need for more of the trade skills.

City employee

I think more than anything, the skills that are lacking are in the soft skills, in the people skills ... how do I fill out a resume? How do I work a computer? How do I log onto a Zoom call? What does public transportation look like? What does childcare look like?

Higher education professional

I'm concerned about the growth of the hospitality industry, and I wouldn't be in and of itself, but when compared to all the others, it really concerns me because I think we have so much potential. It's frustrating to see so little growth in some of those areas that could be really creating a lot of great jobs for people.

City elected official

There's plenty of jobs here. ... There's not a lot of careers here. You have very large pockets of high turnover It's hard to invest in because it doesn't lead to any kind of self-sufficiency.

Workforce professional

I think the training that's available, it's to meet minimal need ... because there's just not many opportunities for careers with sustainability.

Workforce professional

C. Stakeholder Input — Challenges for employers and employees

Stakeholders spoke about several challenges that employers, employees and job seekers in Flagstaff face. Many of these challenges are outside the scope of Keen Independent’s study with the City but are important to note.

Overall Challenges

Many of the workforce challenges stakeholders discussed affect both employers and employees.

Cost of living. In every conversation we had, the study team heard about the cost of living as a major challenge (potentially the largest challenge) for both employers and employees in Flagstaff. Stakeholders cited rent, mortgages, and costs of goods and services as having increased substantially in recent years, outpacing what workers earn.

Stakeholders familiar with educational institutions commented that schools’ high graduation rates do not necessarily translate to more workers, since many are priced out by cost of living. A few mentioned large incidents of students moving away from Flagstaff after graduation.

I know there's a lot of folks who will say, well, you know, the cost of living has increased everywhere. And I think, while that might be true, the problem is very, very acute here in Flagstaff.

Higher education professional

You know, [people] can make a solid 6 figures here in Flagstaff and struggle or they can go somewhere else where the cost of living is significantly less and make about the same.

Higher education professional

We get so many people that are really excited about the opportunity work for, work in Flagstaff, they just can't make the numbers work with [the high cost of living].

City employee

We have a robust sign-on and bonus and relocation program and those initiatives help us bring people in from other states, but shortly after ... they have to rely on the wages that they make no matter what market adjustments we make. We continue to struggle ... with folks who just leave with less than a year of service with us and they just tell us, “I just can't continue living here. I really like it. I love the job. I love the organization. I just can't make it.”

Healthcare professional

We [NAU] can produce graduates all day long ... [it's] just to come to a point where you know, people can't afford to be here, right?

Higher education professional

The cheapest house in Flagstaff is like \$1.8 million. A studio apartment is \$2,000. And God forbid you have a kid and you gotta pay childcare. Soon as you [graduate], you leave.

Workforce professional

C. Stakeholder Input — Challenges for employers and employees

Lack of housing. Relatedly, many stakeholders pointed to the lack of any available housing, affordable or not, in Flagstaff. With limited new construction, incoming workers experience difficulties finding places to live, making it difficult for employers to retain their new hires. A few stakeholders mentioned the influx of second homeowners as a factor contributing to the housing shortage.

Affordable childcare. A few stakeholders specifically mentioned affordable childcare as a barrier to employment. One stakeholder moved to Flagstaff from another community that had universal pre-K and was surprised that Flagstaff did not.

Awareness. There were many workforce development resources mentioned throughout our conversations with stakeholders. One stakeholder suggested that a potential barrier to self-sustaining employment is the lack of broader awareness of those resources and how to utilize them.

I would say a big [challenge] is the housing and being able to attract and retain qualified candidates, qualified talent.

City employee

I'm paying my guys \$40, \$45 an hour and I advertise that, you know, to look for other mechanics nationwide and I can't get anybody to move here because our rent prices are so high because our housing is so low. And you know, that was that's been a common trend here for a long time.

Small business owner

If I'm not losing people to the restaurant industry I'm losing them to Flagstaff housing.

Workforce professional

We need all levels of housing and we need to update infrastructure.

Workforce professional

Tomorrow, I-17 is gonna be a zoo because [Phoenix residents are] all coming up here to go skiing and, by the way, they're all staying in AirBnbs that are all second homes.

Higher education professional

Another factor I think that contributes to young families leaving is access to quality and affordable childcare and preschool.

K-12 professional

I just believe that a lot of people just don't know about all the resources that are available to them.

Workforce professional

C. Stakeholder Input — Challenges for employers and employees

Challenges for Employers

Stakeholders discussed several challenges that employers in particular face in Flagstaff.

Minimum wage. One extremely commonly cited challenge for employers was the minimum wage ordinance. We were told that many businesses have had to close or scale back their operations to afford to pay their workers more.

Entities that are not subject to the minimum wage ordinance are also suffering because they are often unable to compete with service jobs that offer more flexibility and better pay. Participants have observed or heard of workers who elect to take a service job over a government job or a job at an educational institution for this reason.

Restrictions and fees. A few stakeholders commented that Flagstaff has many regulations in place that make it difficult for new businesses or industries to establish themselves.

And I don't see [shortage of skills among] our workforce as being the problem. The problem is minimum wage ... employers are downsizing. They're cutting back, they're trying to do more with less.

Workforce professional

... with the high minimum wage here in Flagstaff, we compete with people who are saying, like, "Why would I work 12-hour shifts in a hospital taking care of, you know, ill patients when I could go work at Target for the same amount of money?"

Healthcare professional

There's a number of reasons [employers are] not tapping into any of these training dollars and numbers for trainees are just not there. What I'm seeing from the employer side is they don't have its time or resources to ... access these dollars. Employers are scrambling because they're trying to figure out this last 60-cent increase [in the minimum wage] which started a month ago.

Workforce professional

We have really high fees. We just passed a stormwater rate increase that's gonna start being impactful in another year or so ... there's a lot of negatives when an industry is looking to come to Flagstaff.

City elected official

[The City should look into the] permitting process ... I've heard nightmare story after nightmare story about businesses ... they see all of the hurdles placed in front of them and they're like, "You know what? Check. I'm out of here. I can go to Winslow and not only pay way less money, but they'll give me darn near everything I want."

Higher education professional

C. Stakeholder Input — Challenges for employers and employees

Training and certifications. When discussing candidate qualifications, some stakeholders mentioned that employers would like to see more workers coming in with job-relevant certifications. Relatedly, a few discussed difficulties with on-the-job training. While larger employers have more resources to get employees up to speed, representatives from smaller businesses cited challenges affording high-quality training required for many new hires.

Shortage of available workers. Stakeholders indicated that many industries in Flagstaff are facing worker shortages due to the factors outlined earlier in this section. A few specific industries that participants mentioned as experiencing acute shortages included healthcare (specifically nursing), manufacturing and transportation.

Some of our more niche positions like our project manager positions, our engineering positions are difficult to fill right now. You know, just those positions that really require a specific skill set or specific certifications.

City employee

It would be ideal for people to come in with some of these certifications already.

City employee

I can't afford to teach them [new hires].

Small business owner

Essentially, we train people to then go somewhere else and find a lower cost of living.

City elected official

[We recognize that] nurses, specifically, [are] not just a regional need, but a statewide need.

Higher education professional

I mean, we have people that are knocking down our door saying we need maintenance [technicians].

Higher education professional

There is a lot of, internal competition between different agencies ... take CDL drivers, for example ... there's just not enough.

Higher education professional

C. Stakeholder Input — Challenges for employers and employees

Workers leaving. Stakeholders discussed another factor contributing to workers shortages: many in the existing workforce are leaving Flagstaff for the reasons outlined earlier in this section. This exodus of workers and families has meant a decline in new births in Flagstaff and fewer students in the K-12 school system. Higher education is affected by teachers leaving the profession, as many can earn more in the private sector in their respective fields than they can teaching.

Land availability. A few stakeholders commented that businesses are constrained by Flagstaff’s lack of land for development. Due to local ordinances, there is not much land available to be developed, so existing resources must be used efficiently.

Where is that pipeline of skilled labor that we invest millions of dollars in every year to meet the needs of our vacancies? Where are they going? They're leaving. So even with the best efforts of training in individuals, we'll never meet their needs and the needs that are here.

Workforce professional

The birth rate is continuing to decrease and so, [K-12] enrollment in the last 4 years has declined 6 percent ... public schools are paid per pupil from the state, so it impacts our overall budget as well.

K-12 professional

Our teachers are usually in a position where they have been or at least could be making a lot more money [in the industry] than they're making teaching.

Higher education professional

Here, we're also constrained by land availability We need to be utilizing our scarce available land resources as efficiently as possible.

City elected official

C. Stakeholder Input — Existing workforce development programs and services

Keen Independent asked stakeholders to identify existing workforce development programs and services. Many stakeholders highlighted opportunities for improvement of workforce development programs, services and coordination.

Existing Programs

Stakeholders described several different types of workforce development programs, services and initiatives offered in the community. Note that the goal of this discussion was to provide examples of workforce development programs and services that work well, not to compile a comprehensive inventory of programs and services.

Educational institution partnerships. The major educational institutions in Flagstaff serving both K-12 and post-secondary students have formalized partnerships that have created workforce pipelines. Stakeholders discussed the benefits of those partnerships, and many expressed wanting even more joint programming between institutions.

County partnerships. A few stakeholders indicated that their institutions partner with Coconino County and receive WIOA funding for some students in workforce development programs.

[NAU] has a partnership with all of the community colleges around the state ... when somebody applies to NAU, rather than receiving the rejection letter as they used to if they weren't immediately meeting all the requirements, they can enroll directly with [a community college]. As soon as they complete their requirements, they transfer seamlessly into NAU.

Higher education professional

Compared to much of the state and especially a lot of rural communities, we felt we're in a better position. And we attribute a lot of that to the partnership we have with NAU that provides that pipeline of educators for us ... [we are] able to offer them a contract, you know, even before they're graduating.

K-12 professional

[CCC has] a really good presence in the high schools too with dual enrollment courses.

Higher education professional

[NAU] did launch a partnership with Mountain Line and Coconino Community College, so we have our own CDL course that'll come online pretty soon here.

Higher education professional

[For] several of our programs ... students can receive WIOA funding and career services through Coconino County. We also partner with the County Workforce Development Board.

Higher education professional

C. Stakeholder Input — Existing workforce development programs and services

Certificate programs. Stakeholders also discussed traditional certification programs. A few of these programs were identified as highly successful, like the CDL certification program at CCC.

Shorter time to program completion and comparable wages were highlighted among stakeholders as benefits of certificate programs compared to four-year degree programs.

We have a commercial driver's license program. It is 4 weeks full time. You come in, you leave with your class A CDL. We had 150 people go through the program last year and we have about a 98 percent job placement rate. And good paying jobs, \$50,000 to \$60,000 starting [pay].

Higher education professional

You don't have to go for 2 years to get a good paying job. This maintenance technician program ... we have two different versions. One's a 7 week in-person, 25 hours per week and then we also have an 11-week hybrid program ... and you get your OSHA 1 card. You get your opportunity to take your EPA 608 which is for refrigerants, like HVAC, and then you have the opportunity to take the National Apartment Association's certificate for apartment maintenance technician.

Higher education professional

[For] big certifications that are required for a position that candidates may not have, the City will, you know, do our best to help them obtain those certifications by paying for them and helping them through the process.

City employee

C. Stakeholder Input — Existing workforce development programs and services

Expanded programming to meet acute needs. A few stakeholders commented that their institutions are responding to labor market needs by expanding their workforce programming and services. Healthcare and manufacturing were two industries that stakeholders mentioned as having acute workforce needs in Flagstaff.

Challenges to creating these programs include crafting curriculum that covers an extensive topic in a short period of time.

Soft skills training. Several stakeholders mentioned their institutions partnering with businesses and other state and local resources to offer soft skills training. These types of programs include guidance on using computers, resolving conflicts and communicating in the workplace.

[NAU] recently launched an initiative to create a college of nursing rather than just a school of nursing ... [with the] understanding that the need for health care workforce is ... not going away anytime soon.

Higher education professional

[Coconino Community College is] in the process of developing a manufacturing program that is gonna go through ... the basic understanding and skills when it comes to manufacturing. That is such a broad, broad, topic that it's hard to go into robotics and machining and PLCs and all these really specific things.

Higher education professional

We have had specific businesses that have reached out to us to provide customized training opportunities, not necessarily for any type of certificate, but it might be like an HR department that's really small or once an outside entity to train their employees. So, for example, we've been working with Little America Hotel on conflict resolution, team building, team strengths, communication skills

Higher education professional

[CCC works] with a lot of partners like Coconino County Career Services, DES [Arizona Department of Economic Security], ARIZONA@WORK, The Phoenix. We work with a lot of different entities that provide career services support ... for instance, if somebody comes to us that wants to participate in a program, but ... they have no clue how to use a computer, I'm gonna send them over to Goodwill because Goodwill, I know, does computer literacy courses. We don't offer all of those services, but it's knowing who does and then what capacity.

Higher education professional

C. Stakeholder Input — Existing workforce development programs and services

Internships and apprenticeships. Although several stakeholders lamented that internships and apprenticeships were not widely offered, some organizations provide one or both and many are looking to expand those programs. Having an educational partner like NAU, CCC or Flagstaff Unified School District can help organizations offering internships and apprenticeships ensure that they have a steady pipeline of participants.

Upskilling. A few stakeholders spoke about training up existing workers to fill vacancies within their organizations. One of the major benefits of this approach, as explained by one stakeholder, is that the worker is already in Flagstaff and presumably would not have to face many of the barriers to considering relocation.

The fire department has a formal program with CCC and NAU both, I believe. ... Basically, they invite students to come shadow at the fire department and participate in some of their physical activity training and all that to see what it's like to be a firefighter and [learn] how they can become a firefighter.

City employee

I believe Water Services ... has a presence, you know, at the colleges and then the city has an agreement with NAU, regarding internships where all City of Flagstaff internships must be posted on the NAU Handshake website, which is where students can view available internships.

City employee

Another area that I think is really valuable that we're working toward is apprenticeships, creating paid apprenticeships or working more with employers on that on-the-job training.

Higher education professional

Last year, we offered our first internships for high school students.

K-12 education representative

There's been a large uptick in incumbent worker training for us where employers are just upskilling and reskilling ... those individuals are already here, they're working in the company and we're now helping employers to get additional skills where they're having a hard time finding those skilled laborers in the meantime.

Workforce professional

C. Stakeholder Input — Existing workforce development programs and services

Opportunities for Programs and Services

In their discussions of existing workforce development programs and services, stakeholders highlighted areas where there is room for improvement in efficiency and impact.

Coordinated services. One of the most cited opportunities for workforce development programs and services by stakeholders was coordination. Although some stakeholders indicated they have partnerships with other organizations that offer these services and can refer job seekers, many indicated that organizations often do parallel work but do not talk to or coordinate with each other.

Leveraging the community college. Many stakeholders mentioned CCC expanding its role to include more vocational training and certificate programs. Additionally, a few stakeholders expressed that having more dual enrollment classes between the high schools and CCC would help build the pipeline of qualified workers in Flagstaff.

Sometimes, [there is] just a disconnect ... like, DES, ARIZONA@WORK, they often will get people in looking for certain services and maybe not think to send them our way And I think that there's also disconnect from our end too of having students that ... need some of those wrap around services that entities like the County [or City] or ARIZONA@WORK offer.

Higher education professional

I think there's an opportunity for us to get the short-term trainings into the community college that will meet the needs of healthcare in all of those sectors.

Workforce professional

I venture to say we [should] do less training and do more work-based learning because there's so much of a need ... so many different varieties of things we just have to meet the needs of right now with the short-term certificate training. And then we just kind of build up our pathways, right?

Workforce professional

The community college used to think that they were ... a steppingstone to going to [university]. And I think that they can do that still, but I think that they also don't think that they're considered a technical school ... [if they] became both [that would help the workforce] I think that we are missing a lot with technical, vocational skills here.

City employee

We need more community college programs in the healthcare area to be able to offer dual enrollment classes to our students.

K-12 education representative

C. Stakeholder Input — Ways the City can support workforce development

Stakeholders offered ideas about how the City can better support workforce development. We note that while some suggestions are relatively straightforward for the City to implement, others might be difficult for the City to undertake or do not fall under the City's jurisdiction.

Direct Support

Some suggested actions for the City would indirectly support the workforce. There are discussed beginning on page 17 of this appendix.

In the next three pages, we considered stakeholders' suggestions for direct support by the City, including facilitating actions or conversations that relate to workforce and economic development.

Leadership in the region. When envisioning how the City can best support workforce development efforts, most stakeholders indicated that the City could take more of a leadership role in the region by shaping conversations around workforce and bringing together representatives from local organizations.

A few stakeholders commented that the City could also make more of an effort to engage the business community when developing workforce strategy. They said that business owners often felt left out of prior efforts.

Maybe the City needs to ... adopt a leadership role within Northern Arizona.

Healthcare employer representative

I would say to [the City], they need to find some definitive direction, they need to set the mission and vision.

Higher education professional

The City and the County could also be presenting that cohesive [narrative and consider] how we might be able to partner [with other entities].

City elected official

[The City could encourage some] of the larger employers in the City of Flagstaff to join the [County] workforce development board ... so we can make sure we always have funding to meet their needs.

Workforce professional

We need to come together more and discuss the impacts of decisions that are made over here ... [and then] unintended consequences of attracting a business if we're over here increasing fees or making the process slow for developers.

City elected official

The business community doesn't feel as well represented [in the dialogue around workforce] as the [general] community does.

Healthcare employer representative

C. Stakeholder Input — Ways the City can support workforce development

Coordination and partnerships. Coordination of services was another commonly mentioned role the City might play in assisting with workforce development. Even though this role generally falls within the scope of a workforce development board, the City may have opportunities to encourage new programs and partnerships and to foster greater dialogue among key stakeholders.

The concept of more or stronger partnerships was also mentioned. These comments included strengthening existing partnerships (e.g., between the City and the local colleges) and forging new partnerships.

There needs to be coordination. You know, I think the best the City can do is communicate.

Workforce professional

[The City does] have some partnerships [with NAU and CCC] in place but, additional [partnerships] would be great or more attention to that would be great.

City employee

With [the City's] influence, the community college will [add more vocational training programs].

Small business owner

Maybe [the City] could look at forming partnerships not only [within] this county but other counties and ... broadening their scope ...

Healthcare employer representative

At times, we maybe forget others that are doing the exact same work and so we're all moving parallel. But we're only getting so far and so if we were able to align all of our resources ... I think we could capitalize more on the resources we have that are somewhat limited in our community.

Vocational education representative

You know, we have really great organizations that exist in the city that our students aren't even aware of... we would love to see that communication of information where the City is helping us create awareness.

Higher education professional

C. Stakeholder Input — Ways the City can support workforce development

Economic development strategy. Several stakeholders expressed their perception that the City is overly focused on hospitality and tourism. They might be unaware of broader efforts at the City.

We note that the City is working on a new economic development strategy at the time of the writing of this report.

Offering internships and apprenticeships. A few stakeholders indicated that the City has previously offered internships or apprenticeships, but that these programs are not well-established. Stakeholders wanted to see the City actively building a pipeline for its own jobs by working with schools to set up enduring internship and apprenticeship programs.

Another thing that the City could do and should do is look at diversifying where their attention is paid in terms of economic development. I think the Economic Development team from the City's side is very much focused on that hospitality industry, but I think if they look at, attracting some of these ... high wage industries, you know, advanced manufacturing, for example, I think we'd be doing a lot better.

Higher education professional

I would like to see us [continue to] be smart about investments in economic development. Growth has been what we've been talking about, but it really means the type of growth that we want.

City elected official

I think our best bet in the future is to look at what we have available [in terms of infrastructure] and try to get those things filled.

City employee

The City did sponsor a couple of our students in conjunction with the National Workforce Alliance. I'd like to see internships and apprenticeships through the City be offered.

K-12 education representative

C. Stakeholder Input — Ways the City can support workforce development

Indirect Support

Many stakeholders mentioned actions the City could take that would indirectly support the local workforce. Even though these suggestions were not focused on workforce training, they may be necessary conditions for building a stronger, sustainable workforce and local economy.

Housing. Although housing is not part of what Keen Independent focused on in this assessment, it was top of mind for many stakeholders when discussing workforce challenges. Several commented that the City could best support the workforce through making it easier for more housing to be built in Flagstaff.

Stakeholders with knowledge of the City’s current plans and initiatives indicated that Flagstaff is already taking actions to address the housing crisis, but that there are limits on how much the City can do.

Minimum wage and voter education. Stakeholders acknowledged that the minimum wage ordinance was a voter initiative and thus can only be reversed by another voter initiative. Although the City cannot directly change the minimum wage, some stakeholders suggested that the City could engage in more education to inform voters about the effects of these types

of initiatives.

There is nothing that can solve the housing issue like more housing.

Higher education professional

[The City] could rethink the minimum wage decision. It's creating this wage compression and I think that was maybe another unintended consequence ... what it did to the to the \$20 to \$25 an hour employee that a lot of us rely on.

Healthcare employer representative

[The City is] working with many nonprofit partners on getting some affordable housing We are invested in housing, but there's only so much that the City can do.

City elected official

We really have to get a big grasp on the housing problem...and I think we need to work with our County on that at a greater level too.

City employee

In San Diego, there was a cap ... on how much you could raise rent per year. Here, you know, and I'm not a big fan of, "Hey, let's get government [involved]," ... but same time, when I have staff telling me their rent just got doubled, literally doubled I don't have a way to [help with] that.

Higher education professional

One of the things City leadership could do, and this is both elected and employed City leadership, is do better job of educating the voting public, not just [on minimum wage], but on other initiatives and also provide some much-needed leadership in explaining and taking positions and saying why this will be good or not good for certain things.

Healthcare employer representative

C. Stakeholder Input — Ways the City can support workforce development

Transportation. One stakeholder mentioned transportation as a barrier for workers with non-traditional jobs. This stakeholder indicated that the City might indirectly help many workers, particularly those in minimum wage jobs, if it worked to extend public transportation hours.

The City could definitely help ... by extending the bus line [hours]. We clean the bank buildings at 10 o'clock at night ... the bus line is done at 9 p.m.

Small business owner

APPENDIX D. Case Studies

This appendix provides an overview of the workforce development resources in three communities identified to serve as case studies for the City of Flagstaff.

Background

Keen Independent identified potential communities for further research into workforce development strategies that may be instructive to the City of Flagstaff. To be considered, a community needed to meet all or most of the following criteria:

- Has a metro area population size of approximately 50,000 to 300,000;
- Is a high-amenity mountain area community;
- Is located at least 100 miles away from a large metro area (over 1 million in population size);
- Has a university and/or college; and
- Has a strong tourism economy.

Selections. With input from the City of Flagstaff, Keen Independent chose the following communities:

- Asheville, North Carolina;
- Bend, Oregon; and
- Missoula, Montana.

Organization of the Appendix

Major sections of this report appendix are organized by each community identified for case study. For each community, we provide descriptions of the following:

- Community profile, including population size, geography, key industries, cost of living and income;
- Workforce development programs and services offered directly by each City; and
- Workforce development programs operated by partners that work with each City.

Our research was supplemented by brief informational interviews with individuals from these communities who have knowledge of workforce development programs and services.

We note that this appendix is not meant to provide an exhaustive list of workforce development programs and services in each of these communities but rather to provide insight into how other communities with some similar characteristics approach workforce development.

D. Case Studies — Asheville, NC

First, we describe Asheville, North Carolina, a city that is larger than Flagstaff but has some similar features.

Community Profile

Located among mountains and rivers, Asheville is a growing city in western North Carolina with a thriving downtown.

- Metro area population: 476,072.¹
- Geography: Situated near Blue Ridge Mountains.
- Closest metro area with a population of 1 million or more: Charlotte, NC (130 miles).
- Major university/college: University of North Carolina at Asheville, Asheville-Buncombe Technical Community College (A-B Tech).
- Revenue from tourism: \$2.6 billion (2022).²

¹ U.S. Census Bureau (2022). American Community Survey 1-year estimates. Retrieved from Census Reporter Profile page for Bend, OR Metro Area <<http://censusreporter.dokku.censusreporter.org/profiles/31000US11700-asheville-nc-metro-area/>>

² Tourism Economics. (2022). *Economic impact of visitors in Asheville 2021*. Asheville Convention and Visitors Bureau. <https://www.ashevillecvb.com/research-reports/>

³ Hoover, M., Ferguson, S., & Lucy, I. (2023). *Understanding North Carolina's labor market*. U.S. Chamber of Commerce. <https://www.uschamber.com/workforce/understanding-north-carolinas-labor-market>

Key industries. Key industries include trade, education and health services, leisure and hospitality, retail, government, manufacturing and trade, transport and utilities.³

Cost of living and income. The composite cost of living in Asheville is slightly lower than the U.S. average.⁴ However, about 40 percent of Western North Carolina residents are spending half or more of their income on housing.⁵ Median income in Asheville is just under \$64,000, which is comparable to that of Flagstaff (just under \$66,000).⁶

D-1. City of Asheville, North Carolina



Source: Michael Tracey via flickr.

⁴ Asheville Area Chamber of Commerce. (2023). *Asheville Metro cost of living*. <https://www.ashevillechamber.org/wp-content/uploads/2024/03/COLI-2024-FS.pdf>

⁵ Edmonson, E. (2024, February 1). *UNC Asheville graduate advocates for fair treatment and livable wages for service workers in Asheville*. The Blue Banner. <https://thebluebanner.net/16664/news/unc-asheville-graduate-advocates-for-fair-treatment-and-livable-wages-for-service-workers-in-asheville/>

⁶ U.S. Census Bureau. (2022). Population Estimates, July 1, 2022 (V2022) – Asheville city, NC [data table]. QuickFacts <https://www.census.gov/quickfacts/fact/table/ashevillecitynorthcarolina/POP060210>

D. Case Studies — Asheville, NC

City Workforce Programs and Services

With support from Buncombe County and the Asheville City School Foundation, the City of Asheville hosts a leadership academy that provides high school youth with paid summer internship opportunities, community service experience and career literacy courses. A major stated aim of the program is “giving Asheville’s young people the opportunity to stay and work in Asheville.”⁷

In the career workshops, students learn financial literacy and have opportunities to explore different career paths. They are also provided with training in transferable skills that are essential in the workplace. Students are paid while they attend workshops. The program boasts a 100 percent college acceptance rate among participants.⁸

Workforce Partnerships

The City itself provides limited workforce development programs and instead partners with the local workforce development board and other organizations to promote their services.

Mountain Area Workforce Development Board and NCWorks. The Mountain Area Workforce Development Board (MAWDB) serves four counties in North Carolina, including Buncombe County in which Asheville sits. MAWDB allocated WIOA funding to NCWorks Career Centers, which have locations throughout North Carolina, to provide services to job seekers.

At the career centers, NCWorks hosts in-person workshops on topics like networking, social media and resume prep. NCWorks offers soft skills tutorials online that job seekers may use at their leisure either on their own device or at a computer at one of the career centers. Additionally, the career centers host employers each day who can connect with prospective candidates. Many of the centers’ visitors are older workers.

Service referrals. NCWorks Career Centers have a WIOA case manager on site who can connect job seekers with funding for training. If an individual indicates they want to return to school for a certification or two-year degree, an on-site representative will connect them with partner A-B Tech. Popular certificate programs that job seekers referred from NCWorks participate in at A-B Tech include nursing (CNA) and truck driving (CDL).

On-the-job training. NCWorks also distributes funding for on-the-job (OTJ) training. Industries that most frequently make use of these funds include manufacturing, healthcare, and, to a lesser extent, hospitality and tourism.

Unemployment assistance. The career centers also assist individuals whose unemployment insurance income is set to expire. Individuals who have been collecting unemployment for five weeks can see a Reemployment Services and Eligibility Assessment Grants (RESEA) representative who will assist them with making a plan to find employment.

⁷ The City of Asheville. (n.d.). *Community and Economic Development* — CAYLA. <https://www.ashevillenc.gov/department/community-economic-development/economic-development/cayla/>

⁸ The City of Asheville. (n.d.). *Community and Economic Development* — CAYLA. <https://www.ashevillenc.gov/department/community-economic-development/economic-development/cayla/>

D. Case Studies — Asheville, NC

Goodwill Industries. The City of Asheville partners with Goodwill Industries, which delivers a variety of workforce development programs and services, including:

- Job training and placement for individuals with disabilities, veterans and formerly incarcerated individuals;
- GED program (in Asheville, via A-B Tech) with subsequent job placement assistance;
- Job readiness and search training (e.g., resume writing, interviewing, computer access); and
- Skill building programs in partnership with the community college system.

Upon visiting or emailing a Goodwill Career Center, job seekers are connected with a Career navigator who will help direct them to the appropriate programs and services, from resume review and job search to job skills training.

D-2. Goodwill Industries Thanksgiving event



Source: Maryland GovPics.

D. Case Studies — Bend, OR

In this section, we provide an overview of workforce development programs and services in Bend, Oregon.

Community Profile

The largest city among the Cascade Mountains, Bend is known for its varied outdoor activities for residents and visitors.

- Metro area population: 206,549.⁹
- Geography: Situated near the Cascade Mountain Range.
- Closest metro area with a population of 1 million or more: Portland, OR (163 miles).
- Major university/college: Oregon State University Cascades, Central Oregon Community College.
- Revenue from tourism: \$382 million (2022).¹⁰

⁹ U.S. Census Bureau (2022). American Community Survey 1-year estimates. Retrieved from Census Reporter Profile page for Bend, OR Metro Area <<http://censusreporter.dokku.censusreporter.org/profiles/31000US13460-bend-or-metro-area/>>

¹⁰ Dean Runyan Associates (2023). *The economic impact of travel in the city of Bend*. https://www.visitbend.com/wp-content/uploads/2023/05/Dean-Runyan-Bend_04182023.pdf

¹¹ City of Bend. (n.d.). *Economic Development*. <https://www.bendoregon.gov/government/departments/economic-development>

¹² Economic Development for Central Oregon. (n.d.). *About Bend*. <https://edcoinfo.com/communities/bend/>

Key industries. The major industries in Bend are education and health services, leisure and hospitality, retail trade and professional and business services.¹¹ Software, bioscience and manufacturing are among the industries in the area that are experiencing significant growth.¹² The City collaborates with groups like Economic Development for Central Oregon to attract businesses and support its local workforce.

Cost of living and income. Overall, the cost of living in Bend is about 11 percent higher than the national average.¹³ The median household income in Bend is nearly \$17,000 more than that of Flagstaff (approximately \$83,000 compared to \$66,000).¹⁴ Affordable housing is a challenge as demand continues to outpace supply.^{15, 16}

D-3. Cascade Mountains near Bend, Oregon



Source: Andy Melton via flickr.

¹³ Economic Research Institute (2024). *Cost of living data in Bend, Oregon, United States*. <https://www.erieri.com/cost-of-living/united-states/oregon/bend>

¹⁴ U.S. Census Bureau. (2022). Population Estimates, July 1, 2022 (V2022) — Bend city, OR [data table]. QuickFacts. <https://www.census.gov/quickfacts/fact/table/,bendcityoregon,US/PST045222>

¹⁵ *What's to blame for Central Oregon's sky-high cost of living?* (2023, September 7). Central Oregon Daily News. https://www.centraloregondaily.com/archives/central-oregon-daily/whats-to-blame-for-central-oregons-sky-high-cost-of-living/article_405e7390-cd08-576d-9bde-ebd70b6e024d.html

¹⁶ Bend Chamber (2024). *Bend Chamber Workforce Housing Initiative*. <https://bendchamber.org/workforce-housing-initiative/>

D. Case Studies — Bend, OR

City Workforce Programs and Services

The City of Bend has a strategic objective to “grow and develop a talented workforce.”¹⁷ The City leverages its partnerships with the workforce development board and others to deliver programs and services to local job seekers.

Workforce Partnerships

Job seekers in Bend are served by the local workforce development board, which has additional partners to deliver programs and services.

Workforce development board. Bend is served by East Cascades Works (EC Works), the workforce development board that serves 10 counties in Central Oregon. The priorities of EC Works are aligned with that of the State Workforce and Talent Development Board and include:

- Better integrating the K-12 education system into the workforce system;
- Investing in resources that allow for work-based learning; and
- Closing the opportunity gap in access to training, education and job placement services.¹⁸

Mobile workforce development services. Recognizing that access to workforce development services can be difficult for job seekers, in 2024 EC Works partnered with the Central Oregon Intergovernmental Council to purchase and staff a mobile WorkSource Unit (WSU). The WSU will prioritize visits to remote areas of Central Oregon, bringing programming like hiring events to individuals who have historically had less access to career centers.

Central Oregon Community College. EC Works has a partnership with Central Oregon Community College (COCC) as a provider of career and technical education and training. COCC operates a Center for Business, Industry and Professional Development through which job seekers can:

- Prepare for licensing and certification exams, such as those needed to become contractors, tax consultants, pesticide applicators, property managers and real estate brokers;
- Learn program-specific skills (e.g., Microsoft Excel, QuickBooks, Adobe Creative Cloud); and
- Take a general skill building course in areas like digital marketing, data analytics and cybersecurity;

COCC has previously offered pre-apprenticeship programs in industries like construction but no current programs like this are offered.

¹⁷ City of Bend. (n.d.). *Economic Development*.
<https://www.bendoregon.gov/government/departments/economic-development>

¹⁸ East Cascade Works, (2024). *Workforce Innovation and Opportunity Act Local Plan: East Cascades Workforce Area*.

<https://acrobat.adobe.com/id/urn:aaid:sc:VA6C2:1b5d9be4-8b4b-4465-a3d1-0632a42ae096>

D. Cast Studies — Missoula, MT

Keen Independent also reviewed workforce development in Missoula, Montana, another similar western community.

Community Profile

A historic trading post, Missoula is a city where arts, culture and the outdoors attract new residents and visitors. The city's visitor's bureau describes Missoula as a multifaceted regional destination with a thriving arts and culture scene in addition to its outdoor activities.

- Metro area population: 121,041.¹⁹
- Geography: Situated near the Mission Mountain Range.
- Closest metro area with a population of 1 million or more: Spokane, WA (198 miles).²⁰
- Major university/college: University of Montana, Missoula College.
- Revenue from tourism: \$390 million (2022).²¹

¹⁹ U.S. Census Bureau (2022). American Community Survey 1-year estimates. Retrieved from Census Reporter Profile page for Bend, OR Metro Area <<http://censusreporter.dokku.censusreporter.org/profiles/31000US33540-missoula-mt-metro-area/>>

²⁰ The Spokane MSA population is just under 1 million, but it is the closest large metro area to Missoula.

²¹ Erickson, D. (2023, September 25). *Montana's complicated relationship with tourists: Input sought*. Missoulian. https://missoulian.com/news/local/montana-tourism-missoula-plan-10-year/article_544ff2fa-589e-11ee-a4d3-07a236cf3f22.html

Key industries. Government, accommodations and food (hospitality), healthcare and construction are major industries in Missoula.²²

Cost of living and income. The overall cost of living in Missoula is about 2 percent higher than the national average.²³ The median household income Missoula is just under \$60,000.²⁴ In 2020, the City of Missoula adopted an economic health strategic goal to support the development of affordable housing.²⁵

D-4. Downtown Missoula, MT



Source: Joshualove via Wikimedia Commons.

²² Barkey, P.M. (n.d.). *The economic outlook for Missoula and Ravalli Counties*. University of Montana Bureau of Business and Economic Research. <https://www.bber.umt.edu/pubs/seminars/2023/Missoula.pdf>

²³ Economic Research Institute (2024). *Cost of living data in Missoula, Montana, United States*. <https://www.erieri.com/cost-of-living/united-states/montana/missoula>

²⁴ U.S. Census Bureau. (2022). Population Estimates, July 1, 2022 (V2022) — Bend city, OR [data table]. QuickFacts. <https://www.census.gov/quickfacts/fact/table/missoulacitymontana,US/PST045222>

²⁵ City of Missoula. (2020). *City of Missoula Strategic Plan 2020-2023*. <https://www.ci.missoula.mt.us/DocumentCenter/View/53797/City-of-Missoula-2020-2023-Strategic-Plan?bidId=>

D. Cast Studies — Missoula, MT

City Workforce Programs and Services

The City of Missoula’s workforce programs and services are provided primarily through partner organizations.

Workforce Partnerships

Organizations that provide workforce development services for job seekers in Missoula include the state workforce development board, Missoula Economic Partnership, the local university, the local community college and the local K-12 school district.

MontanaWorks. The statewide workforce development board, MontanaWorks, has a Job Service center in Missoula. MontanaWorks coordinates with the Montana Department of Labor and Industry to promote additional state workforce development resources and to advertise state job openings.

The State operates a paid apprenticeship program (described later) that MontanaWorks promotes. Additionally, the MontanaWorks website allows job seekers to search for WIOA-eligible training programs by provider and degree (or certificate) type. AccelerateMT is among these training providers that offers rapid training in a variety of industries, including healthcare, technology and construction and trades.

University of Montana Missoula College. The junior college of the University of Montana, Missoula College provides over 100 certificate programs, most of which require six or fewer classes to complete. Many of these are not specifically workforce development programs (e.g., certificate in African American Studies, which requires 15 credit hours), but can help students stand out in the job market.

Missoula County Public Schools. The City of Missoula aims to strengthen its partnership with Missoula County Public Schools.²⁶ MCPS partners with Missoula College to offer dual enrollment at many schools in the district. Additionally, many MCPS schools offer apprenticeships with local employers.

Montana Registered Apprenticeship. While not explicitly listed on the City’s website, the State of Montana offers a Registered Apprenticeship program that connects job seekers with employers looking to sponsor their training. All apprenticeships through this program are paid. The majority of the program apprentices work in the trades but the program is expanding its available industries and occupations.²⁷ MontanaWorks provides information on this program on its website.

²⁶ City of Missoula. (2020). *City of Missoula Strategic Plan 2020-2023*. <https://www.ci.missoula.mt.us/DocumentCenter/View/53797/City-of-Missoula-2020-2023-Strategic-Plan?bidId=>

²⁷ Montana Registered Apprenticeship. (n.d.). *Partners*. <https://apprenticeship.mt.gov/partners>

D. Case Studies — Lessons learned

In this final section, we summarize major takeaways from studying the three communities in this appendix.

Summary

Although Asheville, Bend and Missoula are different communities with distinct challenges (as is Flagstaff), there were several common themes. We note the following commonalities between each of the case study communities:

- Cities themselves do not directly offer full workforce development programs and instead partner with other agencies and organizations to deliver programs and services. (There are some programs that are directly offered by cities, but they are limited and relatively rare.)
- Local workforce development boards often lead local workforce development and have extensive partnerships with other organizations that act as service providers.
- Local community colleges are instrumental in providing workforce development, such as licensing and certification, soft skills training and industry-specific job training.
- Training programs are often general (internships, soft skills, low-hours certificates, CDL) but workforce development in some communities also invest in workforce for specific industries (OJT) and longer-term training, such as apprenticeship programs.
- Cost of living and housing are concerns in all communities. Although such issues go beyond the scope of this report, they greatly impact the workforce and create more urgency to train more local residents for living wage jobs.