

# Rogue Community College

## External Environmental Scan: Strategic Planning

### Year 1 (2020-21)

#### OVERVIEW

Every seven years the Northwest Commission on Colleges and Universities (NWCCU) requires colleges accredited through NWCCU to review and update their strategic plan. This review and update occurs during the year following the seven-year self-study and is called “Year 1.” Part of the process involves the review of both internal and external environmental scan data, which will drive our collective conversations this year and ultimately the decision on how RCC updates its strategic plan.

This is a critical step in identifying alignment between community needs and RCC services.

The data provided in the following report summarize external factors which will assist in identifying community needs. It is designed to serve as a high-level overview, with links to the data sources should readers desire to do a deeper dive.

While the Institutional Research, Effectiveness, and Planning (IREP) office initially developed this report, content was reviewed by both the College Effectiveness Council (10/30/2020) and the Executive Team to ensure that it includes a broad-enough range of data to effectively support the strategic planning process.

In addition, concern was raised about the impact local wildfires and COVID-19 have had on the regional economy, including unemployment rates. As regional information is updated on this for these two significant events, data will be updated in this report.

#### **This report includes:**

- Rogue Valley Regional Occupational and Industry 10-Year Employment Projections
- Rogue Valley Unemployment Rates
- The economic impact of Rogue Community College (EMSI Study)
- Population Growth in the Rogue Valley, including the examination of the high school pipeline to RCC
- Cost of Living increases

### Rogue Valley Occupational Employment Projections 2019 – 2029

The 2019-2029 Rogue Valley Occupational Employment Projections (released October 1, 2020) are the latest for Jackson and Josephine counties.<sup>1</sup> Because these projections were being compiled just as the pandemic was emerging, they do not fully incorporate the effects of COVID-19 on the job market (Guy Tauer, personal correspondence, October 2, 2020). For the following table, the Standard Occupational Classification (SOC) titles were narrowed to detailed occupations that have a typical entry level requiring postsecondary training (nondegree) or an associate degree, with the exception of a limited number of manufacturing fields that had a typical entry level of “high school diploma or equivalent,” as additional post-secondary education increases the employability of those who earn these credentials. The chart shows occupations relevant to RCC graduates, ordered by the number of projected total openings. Median salaries for each occupation were provided by Burning Glass occupational analysis reports for Josephine and Jackson counties combined, and for Oregon as a whole, which reflect real-time job posting data in the region.

Some manufacturing occupations that RCC provides training for are not represented in the table below. Employment numbers and projections for these occupations were suppressed for confidentiality or insufficient data: lathe and turning machine tool setters, operators, and tenders, metal and plastic; milling and planning machine setters, operators, and tenders, metal and plastic; heat treating equipment setters, operators, and tenders, metal and plastic; tool grinders, filers, and sharpeners; and metal workers and plastic workers, all other.

<b>Rogue Valley Occupational Employment Projections: Selected Occupations (2019-2029)</b>				
<b>SOC Title</b>	<b>Total Openings</b>	<b>% Increase Expected</b>	<b>Median Salary* Rogue Valley</b>	<b>Median Salary* Oregon</b>
Heavy and tractor-trailer truck drivers	2,468	8.0%	\$52,200	\$41,500
Bookkeeping, accounting and auditing clerks	2,086	-0.5%	\$33,400	\$36,200
Medical assistants	1,527	23.0%	\$39,800	\$34,400
Nursing assistants	1,265	11.0%	\$28,800	\$28,400
Automotive service technicians and mechanics	688	6.2%	\$37,900	\$40,400
Dental assistants	664	13.2%	\$28,200	\$31,500
Substance abuse, behavior disorder and mental health counselors	528	12.4%	\$25,100 - \$42,800	\$28,600 - 36,000
Preschool teachers	458	20.3%	\$27,600	\$29,000
Heating, air conditioning, and refrigeration mechanics and installers	429	15.1%	\$40,600	\$42,700

<sup>1</sup> An Excel spreadsheet of these projections is provided in the IREP Data Now! SharePoint site under All RCC Data and Reports/Source Data. The spreadsheet can also be downloaded from the publications section in the right-hand column of this qualityinfo.org webpage: <https://www.qualityinfo.org/rogue-valley>.

<b>Rogue Valley Occupational Employment Projections: Selected Occupations (2019-2029)</b>				
<b>SOC Title</b>	<b>Total Openings</b>	<b>% Increase Expected</b>	<b>Median Salary* Rogue Valley</b>	<b>Median Salary* Oregon</b>
Real estate brokers	399	6.6%	\$25,900	\$34,700
Computer user support specialists	396	11.4%	\$34,200	\$41,800
Insurance sales agents	388	17.8%	\$52,000	\$37,400
Graphic designers	387	6.8%	\$44,100	\$44,500
Phlebotomists	352	18.7%	\$30,700	\$31,300
Dental hygienists	349	13.4%	\$59,800	\$67,112
Pharmacy technicians	300	7.3%	\$31,600	\$31,717
Welders, cutters, solderers, and brazers	281	8.8%	\$38,300	\$35,000
Firefighters	275	14.2%	\$41,700	\$41,700
Computer-controlled machine tool operators, metal and plastic	211	5.8%	\$29,905	\$32,200
Emergency medical technicians (EMT) and paramedics	194	13.5%	\$35,012	\$35,300
Machinists	189	10.6%	\$36,200	\$42,400
Construction managers	169	12.6%	\$80,864**	\$64,700
Computer occupations, all other	146	10.8%	Not Available	Not Available
Medical records and health information technicians	123	9.3%	\$26,923 - \$44,378	\$29,800 - \$30,100
Computer network support specialists	113	13.4%	\$34,200	\$41,800
Massage therapists	78	10.9%	\$53,933	\$39,600
Computer numerically controlled machine tool programmers, metal and plastic	51	37.5%	\$55,629	\$52,000
Tool and die makers	13	18.2%	Not Available	\$52,100
*Median Salaries found in Burning Glass Occupation Analysis Reports. When possible, salaries were disaggregated by education level and the median for associate degree was used.				
**69.2% of individuals used in this median had bachelor's degrees, but the median could not be disaggregated by education level.				

The next table provides industry employment projections for Jackson and Josephine counties.<sup>2</sup> The US Census Bureau distinguishes industry from occupation by explaining that “industry is the type of activity

<sup>2</sup> Industry projections found at <https://www.qualityinfo.org/rogue-valley> have also been uploaded to the IREP Data Now! SharePoint site under All RCC Data and Reports/Source Data.

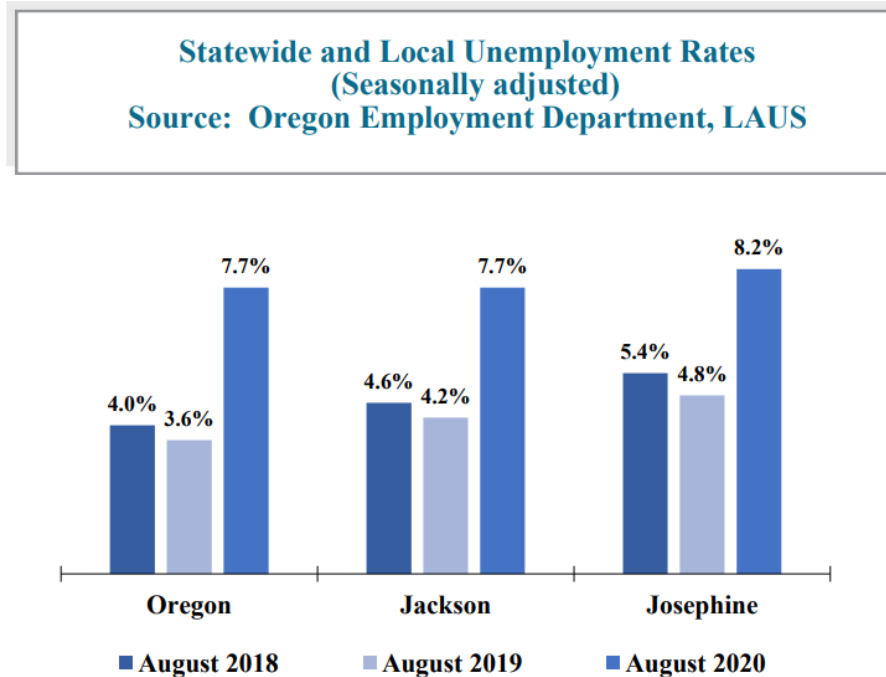
at a person's place of work; occupation is the kind of work a person does to earn a living."<sup>3</sup> Industry is a broader category that includes many occupations at different educational and management levels, all working toward similar activities.

<b>Industry Employment Projections, 2019-2029</b>				
<b>Jackson and Josephine Counties</b>				
	<b>2019</b>	<b>2029</b>	<b>Change</b>	<b>% Change</b>
<b>Total employment</b>	<b>128,340</b>	<b>139,190</b>	<b>10,850</b>	<b>8%</b>
Total payroll employment	121,320	131,560	10,240	8%
Total private	106,690	116,380	9,690	9%
Natural resources and mining	4,250	5,060	810	19%
Mining and logging	550	600	50	9%
Construction *	5,810	6,600	790	14%
Manufacturing *	11,110	11,990	880	8%
Durable goods	7,240	7,670	430	6%
Wood product manufacturing	2,620	2,740	120	5%
Trade, transportation, and utilities *	25,530	26,790	1,260	5%
Wholesale trade	3,590	3,760	170	5%
Retail trade	18,140	18,880	740	4%
Transportation, warehousing, and utilities	3,800	4,150	350	9%
Information *	1,480	1,530	50	3%
Financial activities	5,570	5,900	330	6%
Professional and business services	9,810	10,770	960	10%
Private educational and health services	23,570	26,680	3,110	13%
Private educational services	1,060	1,150	90	8%
Health care and social assistance *	22,510	25,530	3,020	13%
Health care	18,230	20,890	2,660	15%
Leisure and hospitality	15,040	16,220	1,180	8%
Accommodation and food services	13,120	14,140	1,020	8%
Other services	4,520	4,840	320	7%
Government	14,630	15,180	550	4%
Federal government	2,070	2,030	-40	-2%
Federal government post office	450	470	20	4%
State government	1,450	1,580	130	9%
Local government	11,110	11,570	460	4%
Local education	7,400	7,710	310	4%
Self-employment	7,020	7,630	610	9%
Contact: Guy Tauer, Regional Economist, Guy.R.Tauer@oregon.gov, 541-816-8396 Oregon Employment Department, Workforce and Economic Research Division Published: October 1, 2020 <b>* Highlighted rows represent five regional industry sectors RCC supports (information includes IT/media).</b>				

<sup>3</sup> [https://www.census.gov/topics/employment/industry-occupation/about/faq.html#par\\_textimage\\_1746965162](https://www.census.gov/topics/employment/industry-occupation/about/faq.html#par_textimage_1746965162)

## Effects of the Pandemic

“In August of 2020, Jackson County’s unemployment rate was 7.7%, [down from 15.6% in April] up 3.5 percentage points from last year. Josephine County’s unemployment rate was 8.2% [down from 15.1%], up 3.4 percentage points over last year. Leisure and hospitality, which includes accommodation and food services, had dropped the most jobs by sector in both counties.”<sup>4, 5</sup>



Workers with an education level of high school or less have been hit hardest by the pandemic. “This is likely a reflection of the industries most impacted by COVID-19 related closures, such as leisure and hospitality, construction, retail, and manufacturing, which have a higher concentration of workers with a high school diploma or less.”<sup>3</sup>

As shown in the following chart, the industries that have seen the greatest job losses from the pandemic are accommodation and food services, retail trade, and health care and social assistance.<sup>6</sup> This is true at the state level as well, with minor differences in the order of industries hit hardest.<sup>7</sup>

“Continued [unemployment insurance] claims have experienced a reduction, but they are still quite elevated compared to the levels prior to the pandemic...The industries most affected in Jackson [and] Josephine...counties with these continued claims remain accommodation and food services, retail trade, and health care and social assistance... In the coming months our recovery looks slow based on the pace that people are returning to the work place. There are so many unknowns and until a solution to stop

<sup>4</sup> <https://www.qualityinfo.org/documents/10182/96541/Rogue+Valley+Economic+Indicators?version=1.45>

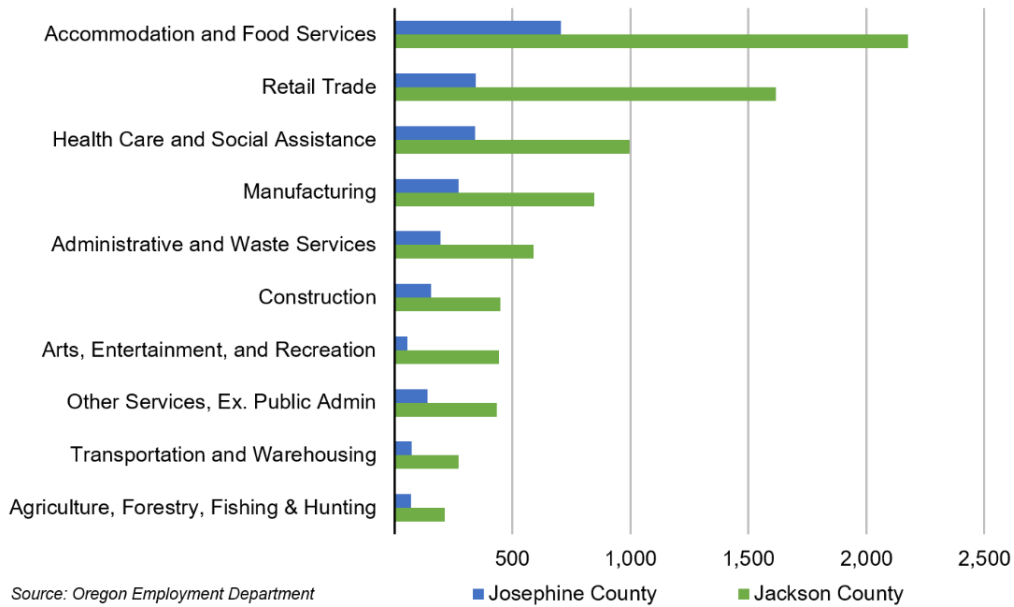
<sup>5</sup> <https://www.qualityinfo.org/rogue-valley?region=4117000006~laus~true~false~true~true~true>

<sup>6</sup> <https://www.qualityinfo.org/-/the-impact-of-covid-19-on-the-labor-market-in-jackson-and-josephine-counties?inheritRedirect=true&redirect=%2Frogue-valley>

<sup>7</sup> <https://www.qualityinfo.org/covid-19>

the spread of COVID-19 is in place the workforce will continue to be impacted by the number of cases in the counties.”<sup>8</sup>

**Continued UI Claims by Industry  
Workers Claiming Unemployment Benefits  
May 2020**



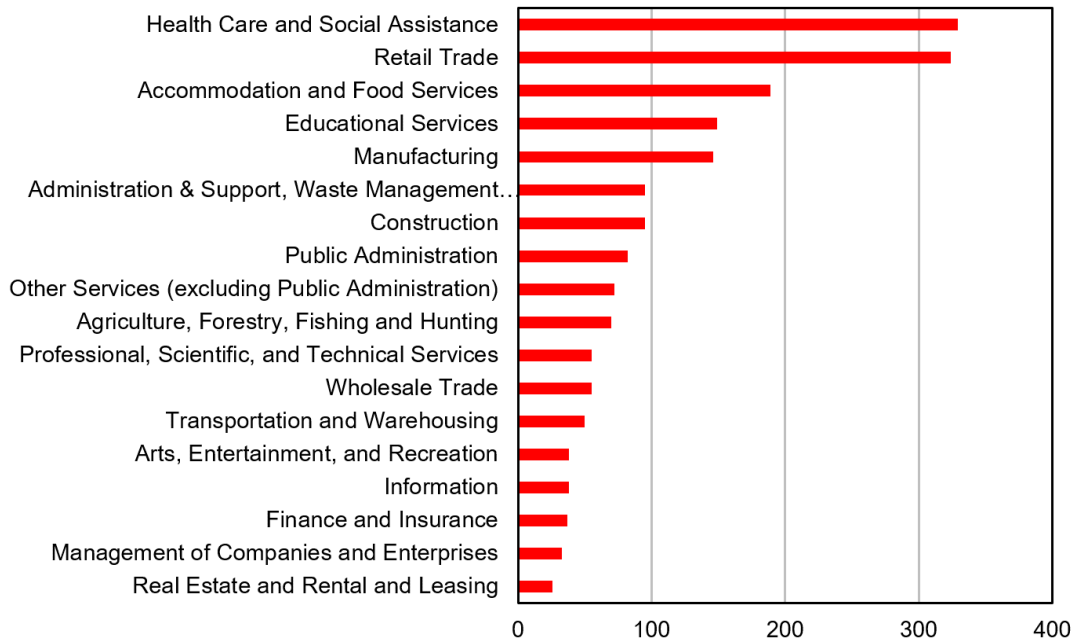
**Effects of the Almeda Fire**

“At last published count, 2,537 residences and about 100 businesses were [destroyed]...It is estimated that 4,000 individuals are now displaced, living in hotels, the Jackson County Expo, with friends or family, or somewhere else in or possibly out of the Rogue Valley... In 2017, about 325 workers who lived in the affected area were employed in both health care and social assistance, and retail trade, both about 17 percent of the total. About 190 local workers had jobs in accommodation and food services in 2017, accounting for 10 percent of the total workers in the area.”<sup>9</sup>

<sup>8</sup> <https://www.qualityinfo.org/-/pulse-on-the-pandemic-in-jackson-josephine-klamath-and-lake-counties?inheritRedirect=true&redirect=%2Frogue-valley>

<sup>9</sup> <https://www.qualityinfo.org/-/analysis-of-almeda-fire-impact-area-with-census-on-the-map?inheritRedirect=true&redirect=%2Frogue-valley>

### Workers by Industry Living in Alameda Fire Impact Area, 2017



Source: Oregon Employment Department and U.S. Census Bureau OnTheMap for Emergency Management

### The Economic Impact of Rogue Community College (EMSI Study)

In preparation for the 2021 Legislative session, Oregon Community Colleges participated this last spring in updating the EMSI economic impact study to be reflective of 2018-19 data. Reports were produced for each community college as well as an overall report reflective of the economic impact of all community colleges within the state.

#### Economic Impact Highlights

RCC added \$368.2 M in income to the RCC district economy during the analysis year.

- This amount is equal to approximately **2.8%** of the total GRP (Gross Regional Product) of the district and is as large an impact as that of the entire Information industry in the region (p. 4, Executive Summary<sup>10</sup>)
- In terms of jobs supported, RCC’s total impact supported 5,889 regional jobs, or 1 out of every 29 jobs in the district
- The sector supported most was Health Care and Social Assistance; 1,477 jobs in FY 2018-19

These are impacts that would not have been generated if RCC did not exist in the district (p. 4, Executive Summary).

<sup>10</sup> EMSI Executive Summary will be posted under Report on IREP’s Data Now! as well as located here : <https://staffrogucecc.sharepoint.com/:b:/s/IREPDN/EVyk80hAfP5OqiRZHxYq82UBZ9G9NyzKdKXmzAwkSizkyA?e=w0DRx6> .

### Investment Analysis Highlights

Measured from three stakeholder perspectives, students, taxpayers, and the community:

- For every dollar a student invests in their education at RCC, they can expect about \$5.40 in higher future earnings (p. 6, Executive Summary)
- For every dollar of public money invested in RCC, taxpayers will receive \$1.80 over the course of the students’ working lives, as a result of added tax revenue and a reduced demand for government-funded services (p. 6, Executive Summary)
- The people of Oregon will receive about \$6.50 in return for every dollar invested in RCC (p. 7; Executive Summary)

### Effects of Population Growth

Overall, the population for Jackson and Josephine counties is expected to grow by 4% over the next 5 and 10 years. However, by 2025, the high school-aged population is expected to decrease by 5%, but then increase 12% by 2030, for a net increase of 7%.

<b>Population Forecast for Jackson and Josephine Counties*</b>					
<b>Age Range</b>	<b>2020 Estimate</b>	<b>2025 Estimate</b>	<b>% Change 2020 to 2025</b>	<b>2030 Estimate</b>	<b>% Change 2025 to 2030</b>
0 to 4	16,339	16,139	-1%	16,334	1%
5 to 9	17,751	17,886	1%	17,901	0%
10 to 14	17,143	19,240	12%	19,530	1%
15 to 19	17,854	16,992	-5%	19,379	12%
20 to 24	15,828	15,675	-1%	15,194	-3%
25 to 29	15,426	15,558	1%	15,391	-1%
30 to 34	17,985	17,405	-3%	17,648	1%
35 to 39	17,498	19,093	9%	18,730	-2%
40 to 44	18,419	19,297	5%	21,341	10%
45 to 49	18,855	20,301	8%	21,558	6%
50 to 54	19,312	20,075	4%	21,910	8%
55+	120,842	127,585	6%	134,890	5%
<b>Total</b>	<b>313,254</b>	<b>325,243</b>	<b>4%</b>	<b>339,805</b>	<b>4%</b>

*\*Population Research Center, Portland State University, June 30<sup>th</sup>, 2018 <sup>11</sup>*

### Effects of Increasing Cost of Living/Lower Wages

Analysis from the 2020 ALICE financial hardship study for Oregon found 44% of Oregon households struggle to make ends meet. The percentage of struggling households was slightly higher for Josephine county, at 46%, and lower for Jackson County, at 37%. These low-income households are “as diverse as the general population, composed of people of all ages, genders, races, and ethnicities, living in rural, urban, and suburban areas.”

<sup>11</sup> <https://www.pdx.edu/population-research/population-forecasts>



The study shows that the cost of living is increasing while the proportion of low-wage service jobs is expanding. The result is that an increasing number of households struggle to pay for their essential needs. “From 2007 to 2018, the cost of...housing, childcare, food, transportation, health care, and technology...increased faster than the cost of other goods and services... at an average rate of 3.4% annually nationwide” compared to an inflation rate of 1.8%.<sup>12</sup>

“Households that are severely rent-burdened (with rent accounting for more than 50% of their income) are projected to grow by at least 11%, to 13.1 million households, by 2025.”<sup>7</sup> As stated in the March 19<sup>th</sup>, 2019 IREP board report, Josephine and Jackson county housing costs are some of the highest in the state and country when local incomes are accounted for. Of the 50 states, Oregon has the eighth highest median gross rent as a percentage of household income, at 30.9%.<sup>13</sup> Within the state, Josephine County (34.5%) is second only to Benton (36.7%) for the same measure, while Jackson County (33.3%) is fourth out of the 36 counties.<sup>14</sup>

“In 2018, there were eight infants and toddlers for each childcare slot in Oregon. This issue is pervasive across the state, in rural, urban, and suburban areas; in 2018, Oregon State University designated all 36 counties in the state as ‘childcare deserts’ (defined as communities with three or more children per childcare slot).” The cost of childcare in Oregon increased 10% from 2017 to 2018. “In 2018, the average annual costs for home-based care (\$9,153) and center-based care (\$13,518) for an infant were similar to the average annual tuition at a public four-year university in Oregon (at \$10,610). Across income groups, single parents pay 53% of their income for center-based infant care, and married parents living at the poverty line pay 94% of their income for center-based care for an infant and a preschooler.”<sup>7</sup>

While a record-low rate of unemployment was reached in 2018, the number of low-wage jobs expanded significantly, producing another record number of 55% of Oregon workers paid by the hour in 2018, with 57% of all Oregon jobs paying less than \$20 per hour. “Employment growth over the last 10 years was almost exclusively comprised of low-wage jobs that could not keep up with the increased cost of the basic household budget...This trend is driven largely by the rapid growth of service-sector industries in the state.” From 2007 to 2018, the number of low-wage jobs increased by 150% while medium and high-wage jobs decreased by 18% and 27%, respectively.<sup>7</sup>

“More than two-thirds of students enrolled in community colleges work full or part-time...Students report that two of the major obstacles to academic success are juggling work with school and other responsibilities and difficulties meeting expenses.”<sup>7</sup>

### **CCSSE 2020 COVID-19 Survey**

In lieu of the usual CCSSE survey, a survey focused on the effects of COVID-19 was administered to students during the 2020 spring term. This survey showed that respondents’ top 3 challenges to fully engaging in online courses were “having enough time to study” (47%), “working from home makes it difficult to separate work and school” (35%), and “caring for family members” (32%). Their top three dissatisfactions were “the education you are receiving online” (33%), “access to library resources” (24%), and “financial aid advising” (22%). The great majority of students indicated that they were concerned

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<sup>12</sup> <https://unitedforalice.org/Oregon>

<sup>13</sup> American Community Survey 2018, 5 Year Estimates; Report B25071, comparing states.

<sup>14</sup> American Community Survey 2018, 5 Year Estimates; Report B25071, comparing Oregon counties.

about “feeling isolated” (76%), “finding a job after completing my educational goals” (69%), and “paying for my education” (69%).

