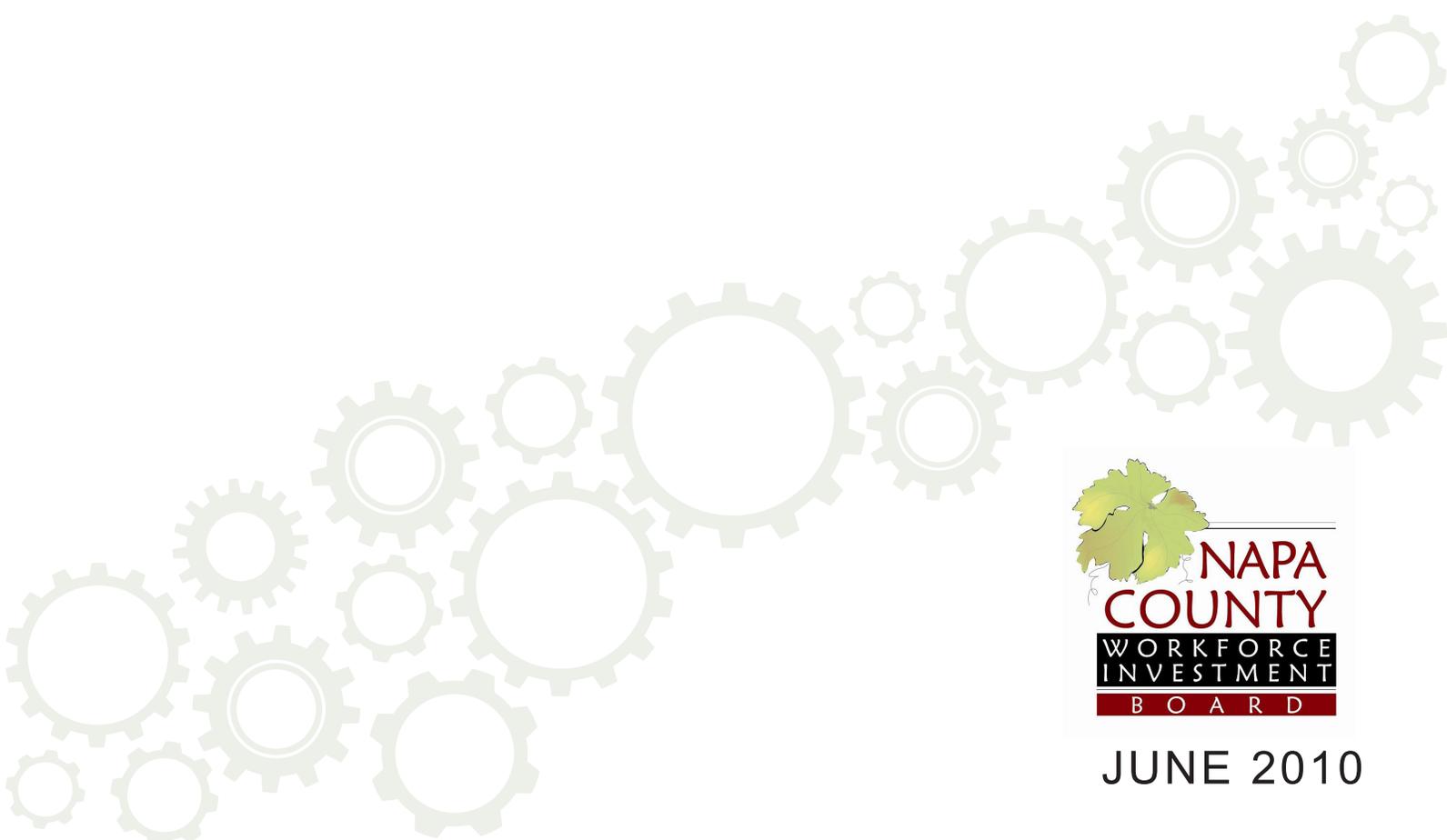


NAPA FOOD & BEVERAGE MANUFACTURING INDUSTRY:

A WORKFORCE NEEDS AND OPPORTUNITIES STUDY



JUNE 2010

Napa Food & Beverage Manufacturing Industry: A Workforce Needs and Opportunities Study

June 2010



Report Authors

Jim Cassio, Workforce Development Analyst
Napa County Workforce Investment Board
650 Imperial Way
Napa, California 94559
Phone: (916) 320-4944

Bruce Wilson, Director
Napa County Workforce Investment Board
650 Imperial Way
Napa, California 94559
Phone: (707) 259-8679

www.napaworkforce.org



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Updated September 3, 2010



Preface

The Food and Beverage Manufacturing Industry in Napa County is one of our most important industries. A major contributor to our local and regional economy, these two sectors combine for nearly 500 employers and 7,500 jobs.

When people think about Napa, they usually think about great wine and great food. As such, the food and beverage manufacturing industry is not only a major economic contributor, but is also key to Napa's cultural identity and prestige as a worldwide destination. Although Napa is one of California's smaller counties based on a population of little more than 130,000 and an area of only 500,000 acres, it has earned a worldwide reputation for quality wines.

How significant is this industry's contribution to our local economy?

The contribution is very significant. Consider:

1. The Food and Beverage Manufacturing Industry comprises about 10% of all of our jobs. This makes it the second largest industry after healthcare in terms of overall job opportunities.
2. It has the second largest payroll (after healthcare) with a total annual payroll amounting to nearly \$496 million. In Napa County, the average annual wage for workers in this industry is about \$55,000 - well above the average for all industries.
3. New job growth for this industry is projected to be faster than average through 2016. The California Employment Development Department's Labor Market Information Division projects a 1.87% annual job growth rate for Nondurable Goods Manufacturing in Napa County. Overall job growth for all industries is projected to be 1.38%.

Purpose of this report?

In late 2009, the Napa County Workforce Investment Board embarked on a new series of industry sector initiatives in order to better understand the needs of local employers – specifically their workforce needs and challenges, and the opportunities they present.

Six industry sector initiative projects each focus on a priority industry selected by the Workforce Investment Board (including food and beverage manufacturing). Each project includes:

- An initial community forum with business leaders representing those industries (includes focus group discussion)
- A workforce needs and opportunities survey with industry employers
- A second community forum to present the findings of the survey and analysis, and to discuss the future of each industry group

Industry sector initiatives have proven to be effective ways for workforce investment boards to develop more effective programs, services and policies in order to better prepare the local workforce to meet the challenges and opportunities of local employers. Another benefit of industry sector initiatives is that the business leaders who participate in the process often find themselves at the center of formal or informal advisory groups that represent the workforce and workforce development interests of their industry.

In conducting this survey and preparing this report, certain workforce challenges and their inherent opportunities became apparent. They are included in a chapter entitled Challenges and Recommendations.



Who are we?

We are the Napa County Workforce Investment Board (WIB). In partnership with the Napa County Board of Supervisors, the WIB oversees local workforce development activities and establishes programs and services in response to the workforce needs of Napa County. Our programs and services are designed to serve employers, employees, job seekers and youth in accordance with our 5 Year Strategic Plan. The plan describes the Workforce Investment Board's commitment to establishing a comprehensive, demand-driven workforce development system for Napa County.



Our Business & Career Center, which is operated by WorkforceNapa, a consortium of local service providers, and is the center of our local workforce development system. This important community resource offers a wealth of training and employment resources, and labor market information, to assist both job seekers and businesses.

WorkforceNapa Business & Career Center

650 Imperial Way, Suite 101
Napa, California, 94559
Phone: (707) 259-8786
www.workforcenapa.org

We also have a satellite career center at the Napa Main Library at 580 Coombs Street in Napa.

Questions regarding the survey should be directed to Jim Cassio, our Workforce Development Analyst:
Phone: (916) 320-4944
Jim7@cassio.com

Other questions regarding this report or our industry sector initiatives should be directed to me.

Sincerely,

Bruce Wilson, Director
Napa County Workforce Investment Board
Phone: (707) 259-8679
Bruce.Wilson@countyofnapa.org



Food and Beverage Industry Overview

The food and beverage manufacturing industry in Napa County includes two sectors of the larger industry known as Nondurable Goods Manufacturing. This refers to the manufacture of products that do not last a long time, are quickly consumed, and are continually replaced by consumers.

Food and beverage manufacturing in Napa County is a vital component of the regional economy, with about 450 employers and approximately 7,400 jobs. Beverage manufacturing, which includes wineries, is the largest of the nondurable goods manufacturing sectors in terms of both the number of employers and jobs. Food manufacturing is the second largest sector.

NAICS Subsectors of the Nondurable Goods Manufacturing Industry in Napa County (sorted by # of jobs)	NAICS codes	# of Firms	# of Jobs
Beverage and Tobacco Product Manufacturing	312	412	6750
Food Manufacturing	311	45	629
Printing and Related Support Activities	323	31	465
Plastics and Rubber Products Manufacturing	326	4	75
Paper Manufacturing	322	5	45
Apparel Manufacturing	315	7	32
Textile Product Mills	314	7	31
Leather and Allied Product Manufacturing	316	5	14
Textile Mills	313	4	5
Petroleum and Coal Products Manufacturing	324	1	0
Chemical Manufacturing	325	14	unknown

Source: Dun & Bradstreet database, Winter 2009-2010

NAICS Industry Sector Descriptions

- **Beverage and Tobacco Product Manufacturing**

This subsector includes three types of businesses: (1) those that manufacture nonalcoholic beverages; (2) those that manufacture alcoholic beverages through the fermentation process; and (3) those that produce distilled alcoholic beverages. Ice manufacturing, while not a beverage, is also included with nonalcoholic beverage manufacturing because it uses the same production process as water purification.

- **Food Manufacturing**

This subsector includes businesses that transform livestock and agricultural products into products for intermediate or final consumption. The industry groups are distinguished by the raw materials (generally of animal or vegetable origin) processed into food products. The food products manufactured in these establishments are typically sold to wholesalers or retailers for distribution to consumers, but establishments primarily engaged in retailing bakery and candy products made on the premises not for immediate consumption are also included.

NAICS (the North American Industry Classification System) is the standard industry classification system used throughout North America. It is used by all U.S. Federal agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. economy.



Sample of Occupations

The following 25 occupations are not exclusive to this industry, but are commonly found in this industry. These occupations also do not constitute a complete list of occupations found in this industry. They are simply the 25 occupations that are most often represented by the jobs in this industry. For a profile of each of these occupations, see the chapter entitled Occupation and Training Profile.

- Bookkeeping, Accounting, and Auditing Clerks
- Chief Executives
- Customer Service Representatives
- Driver/Sales Workers
- Farmworkers and Laborers, Crop, Nursery, and Greenhouse
- First-Line Supervisors/Managers of Production and Operating Workers
- Food Scientists and Technologists, including Enologists
- General and Operations Managers
- Helpers--Production Workers
- Industrial Production Managers
- Industrial Truck and Tractor (Forklift) Operators
- Inspectors, Testers, Sorters, Samplers, and Weighers
- Janitors and Cleaners, Except Maids and Housekeeping Cleaners
- Laborers and Freight, Stock, and Material Movers
- Maintenance and Repair Workers, General
- Mixing and Blending Machine Setters, Operators, and Tenders
- Packaging and Filling Machine Operators and Tenders
- Production, Planning, and Expediting Clerks
- Retail Salespersons
- Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
- Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products
- Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders
- Truck Drivers, Heavy and Tractor-Trailer
- Truck Drivers, Light or Delivery Services
- Waiters and Waitresses

Annual Payroll and Wage Analysis

With a total annual payroll of nearly \$496 million, the nondurable goods manufacturing industry in Napa County has the second largest payroll of all the major industries (after healthcare). Total annual payroll is a combination of total jobs and the wages or salaries paid for those jobs (based on statistics from the California Employment Development Department's Labor Market Information Division).

In Napa County, the average annual wage for workers in this industry is about \$55,000. This is well above the average for all nonfarm industries of about \$44,000 per year.



Sector Strategies

The Napa County Workforce Investment Board (WIB) embarked on a series of industry sector initiatives in late 2009 in order to better understand the needs of local employers – specifically their workforce needs and challenges, and the opportunities they present.

To initiate the sectoral strategy, the WIB selected six industry sector projects with each one focusing on a priority industry:

1. Food and Beverage Manufacturing
2. Durable Goods Manufacturing
3. Healthcare
4. Transportation, Warehousing and Utilities
5. Professional and Business Services
6. Construction and Renovation

A seventh industry sector initiative project - a study of the green economy - has since been added to the list. What makes this green economy project different is the fact that many sectors of the green economy overlap with other industries, including several of those identified for the purposes of our industry sector initiatives.

Each industry sector initiative project includes:

- An initial community forum with business leaders representing the subsectors of each industry (including focus group discussions)
- A workforce needs and opportunities survey with industry employers
- A second community forum to present the findings of the survey and to discuss the challenges and opportunities

What are the objectives and outcomes of industry sector initiatives?

Industry sector initiatives have proven to be effective ways for workforce investment boards to:

1. Better understand the workforce needs and challenges of specific industries
2. Bring together leaders from the business and workforce development communities to address the needs and challenges identified by the sector initiatives
3. Develop more effective workforce development programs, services and policies in order to better prepare the local and regional workforce
4. Develop industry-driven skill panels or employer advisory groups that represent the workforce and workforce development interests of their industries

Outcome examples of industry sector initiatives:

- Partnerships can leverage resources to develop new training programs or seek funds for special projects
- Closer working relationship allows for better labor market research and an improved understanding of the industry's workforce needs and the workforce development system's programs and services
- Allows for the development of new programs and services for incumbent workers
- Allows for better mapping of career pathways and entry-level employment opportunities

The role of education and training providers in industry sector initiatives

Education and training providers play an important role in most sector initiatives. Many of the community-based organizations that operate long-standing sector initiatives, including workforce investment boards, began by providing or brokering training services. Moreover, public policy has increasingly encouraged the development of sector partnerships involving formal education providers such as community colleges and technical schools, and these relationships are growing in number.



Industry sector initiative resources

- **National Association of Workforce Boards (NAWB) - www.nawb.org**

The National Association of Workforce Boards represents the interests of the nation's business-led Workforce Investment Boards. NAWB is guided by a Board of Directors, composed primarily of Workforce Board chairs and past chairs that oversee job training at the local level. Founded in 1979, NAWB membership consists of local boards and governor-appointed state workforce investment boards representing approximately 15,000 volunteers from business and other sectors. Services available include customized-training, publications and information dissemination to workforce investment boards.

- **National Network of Sector Partners (NNSP) - www.insightcced.org/index.php?page=nnspp**

The National Network of Sector Partners is the trade association and resource center for organizations working to develop industry-specific workforce and economic development initiatives across the United States. NNSP can provide information on organizations conducting initiatives in specific sectors and can share strategies that have worked elsewhere. Visit NNSP for profiles of current initiatives, publications, conference announcements, resources, and a quarterly newsletter. Small grants, teleconferences on hot sector topics, and other resources are also available to members.

- **Workforce Strategies Initiative - The Aspen Institute - www.aspenwsi.org**

The Aspen Institute Workforce Strategies Initiative has conducted evaluations, provided technical assistance, and designed key publications in the sector field. Search their website for key publications, findings, and materials on developing outcomes for both individual program participants and employer partners, including information specific to WIB-sponsored sector initiatives.

- **Public/Private Ventures (P/PV) - www.ppv.org**

Public/Private Ventures has developed key publications and evaluations on sector initiatives. They also offer training for workforce development professionals (Working Ventures) and run a small grants program to assist workforce organizations in key sector initiative areas. Search their website for a range of publications and materials of help to practitioners.

- **Working for America Institute - AFL-CIO - www.workingforamerica.org**

The Working for America Institute supports the development of sectoral labor-management partnerships through publications, technical assistance, and workforce policy supports. Visit their website for information on labor-management sectoral programs in the building trades, health care, hospitality, and manufacturing sectors.



Needs and Opportunities Survey

This survey was conducted in March and April of 2010, following a focus group discussion with business leaders representing the food and beverage manufacturing industry in Napa County. In addition to the focus group participants, a total of 18 employers participated in the online survey which was conducted as a confidential survey using SurveyMonkey. The survey response constitutes a 60% response rate. Survey respondents were promised that they would not be identified by name or organization; therefore the survey results are summarized.

1. How many employees do you currently have working at your Napa County location(s)?

Total: 1,627 employees

Individual responses ranged from less than 10 employees to over 500 employees.

2. Of your current employees, how many are:

	Number	Percent
Full time:	1,214	73%
Part time:	95	6%
On call:	62	4%
Temp or seasonal:	283	17%

3. About what percent of your employees live outside Napa County?

Average: 35%

Individual responses ranged from 0% to a high of 85%.

4. Over the past 12 months, has your number of employees:

	Number of employers	Percent of jobs
Increased:	4	39%
Decreased:	6	24%
Remained about the same:	8	37%

5. For what jobs did you hire the most replacement workers over the past 2 years?

- Drivers, Warehouse and Customer Service
- Finance, Administration, Winemaking and Viticulture
- Finance, IT and Hospitality
- Hospitality (Visitor Center) and Operations (Cellar)
- Packaging Dept.
- Production Workers
- Production, Packaging and Warehouse
- Retail Employees
- Shipping/Receiving
- Tasting Room
- Tasting Room Staff
- Tractor Drivers
- Vineyard
- Vineyard and Winery (Production) Workers
- Visitor Center
- Wine Educators (Tasting Room) and Customer Service



6. For what jobs have you had significant difficulty finding qualified applicants who meet your hiring standards?

- ATF Compliance Jobs and Maintenance Mechanics
- Customer Service
- Enologist, Compliance/Accounting Analyst and Vineyard Mechanic
- Production Workers
- Quality Control Maintenance, IT and Bottling Line Workers with Experience
- Quality Control Tech (Lab Tech)
- Restaurant Manager, IT/SAP/CSI/ERP and Viticulturist
- Retail Employees
- Shipping and Production
- Shipping/Receiving
- Vineyard

7. When you consider the new employees you have hired over the past 2 years, are there any specific knowledge, skills or abilities that you feel are in short supply?

- Common Sense, Attention to Detail, Computer Skills
- Communication and Math Skills
- Communications Skills/ESL, Supervisory Abilities for Production Jobs
- Manufacturing Skills, Knowledge of the English Language
- People esp. the younger hires have a different work ethic than I or my parents had.
- Professional Phone Etiquette, Data Entry Skills, MS Word and Excel Applications Skills
- Reading, Writing and General Education
- Vineyard Mechanical Skills, Compliance Knowledge

8. About how many new jobs do you expect to add during the next 2 years?

	Number of new jobs	Percent of new jobs
Full time:	71	49.5%
Part time:	23	16%
On call:	18	12.5%
Temp or seasonal:	32	22%
TOTAL:	144	100%

9. What types of jobs will make up the most new positions?

- Accounting and Wine Club
- Administrative Positions and Hospitality Jobs
- Cellar and Tasting Room
- Drivers and Customer Service
- Hospitality
- Hospitality
- Kitchen and Retail Sales Help
- Production and Packaging
- Production and Warehouse
- Production Maintenance and IT
- Production: Machine Operators and Supervisors
- Sales
- Sales, Maintenance and Hospitality
- Seasonal Harvest Help and Customer Service (Tasting Room, Wine Club, etc)
- Shipping and Gift Packaging
- Vineyard Workers



10. Do you expect your overall number of employees to be reduced over the next 2 years?

	Number of employers
Yes:	1
No:	16
Not sure:	1

11. If YES, about how many employees do you expect to lose?

The single employer who responded YES to question 10 reported that they expect to reduce their payroll by two jobs due to a "change in business strategies."

12. What are the top trends that we should be aware of that are affecting, or will affect, your industry?

- Customers becoming increasingly demanding, selective and price-sensitive.
- Economy
- Grape prices, vineyard land value and potential investor pool.
- Healthcare reform, increased taxation, affordable housing and skilled labor force needs.
- It is always difficult to find employees with technical hands-on training for skilled production, mechanical and manufacturing positions. Very little focus in schools on these areas.
- Lack of available credit.
- Need immigration reform so there is a path to legalization for the undocumented.
- New law and/or regulations. New technologies.
- New or bigger excise taxes. Ongoing economic strife.
- Stringent building code regulations affect our ability to expand within our existing building.
- The economy - people will start leaving to find affordable housing and benefits.
- This industry held its own through the economic crisis because we are an inexpensive luxury.
- Trends will be mostly based on the economy. The higher the sales, the more employees we can hire.
- Wine is a luxury product and if the economy doesn't turn around, we could be in trouble.

13. Are there any specific education or training programs in Napa County or nearby that you would like to recognize as excellent programs for preparing a skilled workforce?

- Napa Valley College and their vineyard and cellar practices courses.
- Napa Valley Grap growers and Napa Valley Vintners (trade associations) have good programs.
- Sonoma State and their wine business program.
- Summer Search does an excellent job of helping resilient young men and women to graduate from high school and college and give back to the community.
- UC Davis for their enology program
- WISE Academy (Wine Industry Sales Education) prepares and educates wine industry sales and management personnel.

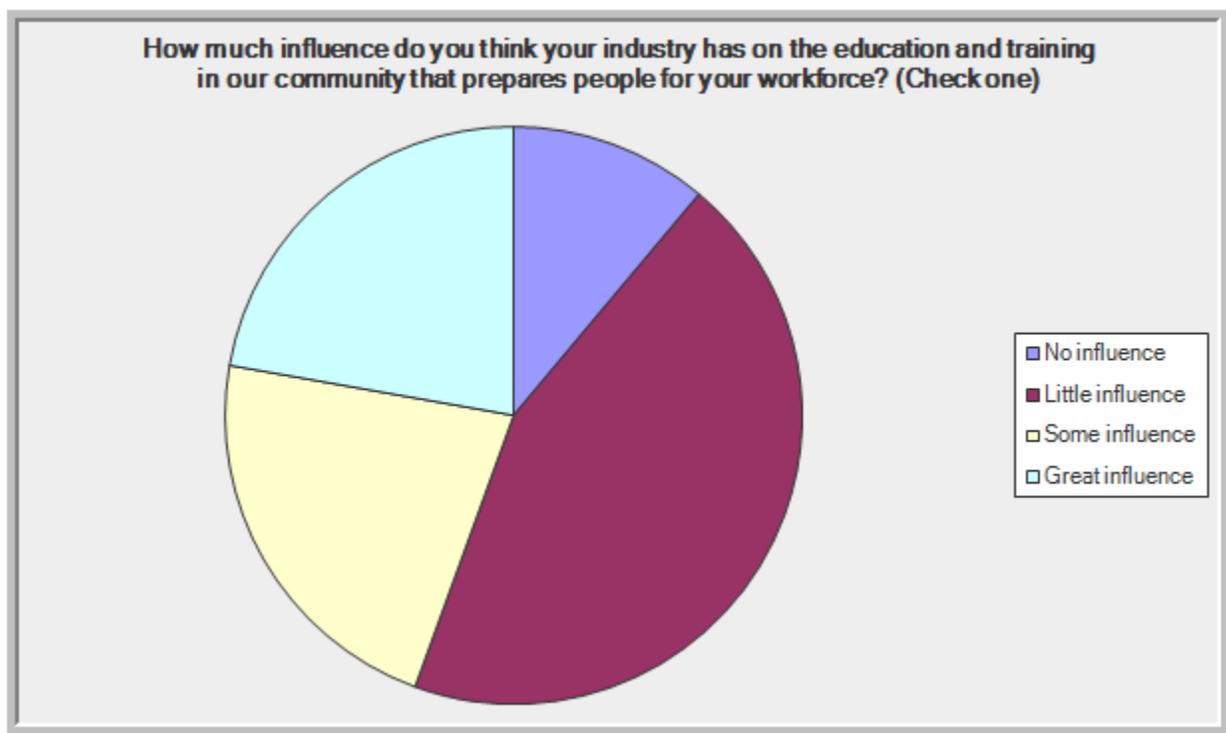


14. Are there any specific education or training programs in Napa County or nearby that you would like to recognize as being deficient in their ability to prepare a skilled workforce?

Responses to this question will be communicated directly to the education/training providers. Suffice to say that no two survey respondents identified the same program as being deficient.

15. How much influence do you think your industry has on the education and training in our community that prepares people for your workforce? (Check one)

	Number of employers	Percent of employers
No influence:	2	11%
Little influence:	8	45%
Some influence:	4	22%
Great influence:	4	22%





16. In what ways are you able to have that influence?

Respondents who said "No influence"

- Being a very small facility (and employer) we will have limited impact, and limited ability to contribute to new programs or community efforts.

Respondents who said "Little influence"

- Almost all of our professional employees have degrees from colleges outside Napa.
- Organizations such as Napa Valley Vintners has a strong voice because it is a "co-op" of vintners, but I don't know how focused they are on education for our industry.

Respondents who said "Some influence"

- It's the main industry here.
- Through support of industry specific community college programs.

Respondents who said "Great influence"

- The industry is very focused on education and training and spends time and effort in that area.
- Our industry provides the hands-on learning ground for candidates.
- By making educational opportunities available to our workforce.
- We can require and provide our employees educational opportunities to help them to be better at their wine industry jobs.

17. In general, how important are the following types of labor market information to you?

- **Economic outlook reports by industry sector:**

	Number of employers	Percent of employers
Extremely Important:	4	22%
Very Important:	8	44%
Somewhat Important:	5	28%
Not Important:	1	6%

- **Occupational research reports:**

	Number of employers	Percent of employers
Extremely Important:	0	0%
Very Important:	3	17%
Somewhat Important:	13	72%
Not Important:	2	11%

- **Postsecondary education and training directory:**

	Number of employers	Percent of employers
Extremely Important:	1	6%
Very Important:	0	0%
Somewhat Important:	13	72%
Not Important:	4	22%



18. In general, how difficult is it for you to find new employees who possess these **BASIC SKILLS** prior to employment:

- **READING SKILLS:**

	Number of employers	Percent of employers
Extremely Difficult:	2	11%
Very Difficult:	2	11%
Somewhat Difficult:	7	39%
Not At All Difficult:	7	39%

- **WRITING SKILLS:**

	Number of employers	Percent of employers
Extremely Difficult:	3	17%
Very Difficult:	2	11%
Somewhat Difficult:	8	44%
Not At All Difficult:	5	28%

- **MATH SKILLS:**

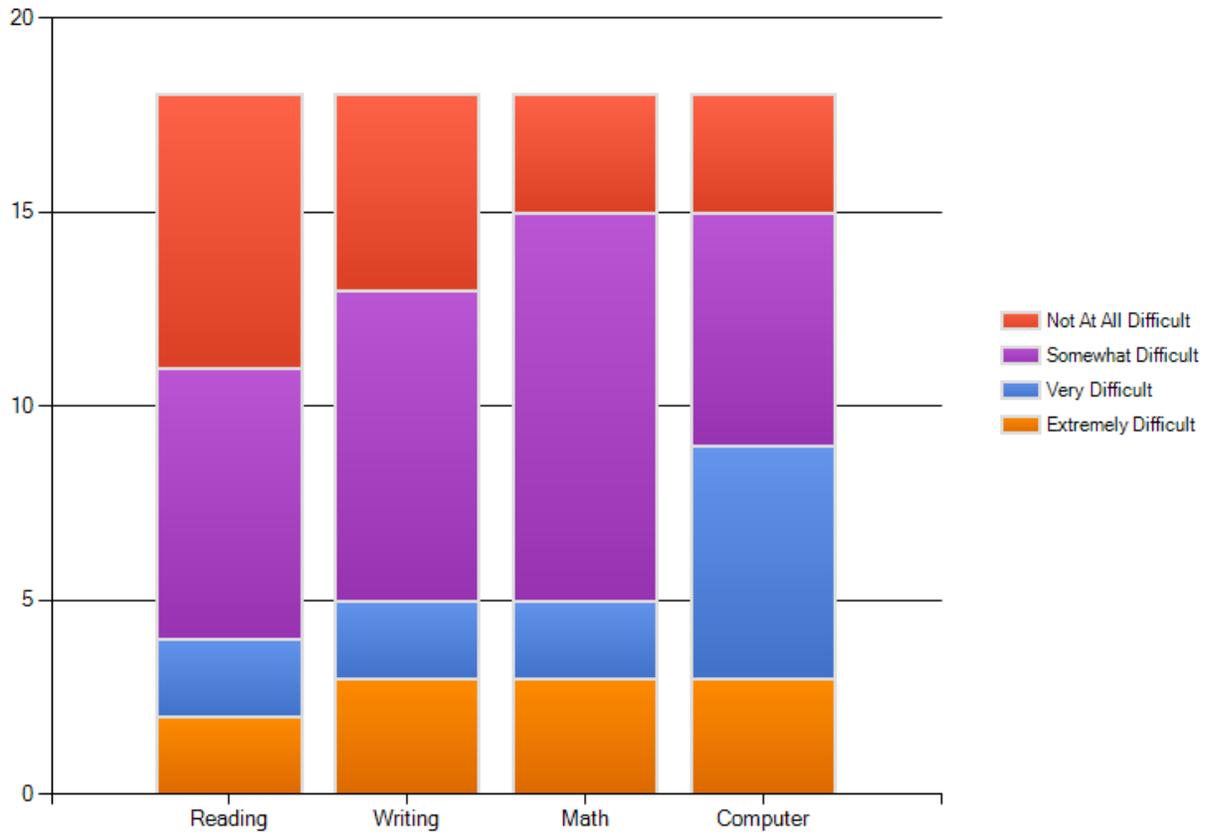
	Number of employers	Percent of employers
Extremely Difficult:	3	17%
Very Difficult:	2	11%
Somewhat Difficult:	10	55%
Not At All Difficult:	3	17%

- **COMPUTER SKILLS:**

	Number of employers	Percent of employers
Extremely Difficult:	3	17%
Very Difficult:	6	33%
Somewhat Difficult:	6	33%
Not At All Difficult:	3	17%



In general, how difficult is it for you to find new employees who possess these BASIC SKILLS prior to employment:





19. In general, how difficult is it for you to find new employees who possess these WORKPLACE SKILLS prior to employment:

• **TEAMWORK SKILLS:**

	Number of employers	Percent of employers
Extremely Difficult:	1	6%
Very Difficult:	3	17%
Somewhat Difficult:	8	44%
Not At All Difficult:	6	33%

• **PROBLEM SOLVING/CRITICAL THINKING SKILLS:**

	Number of employers	Percent of employers
Extremely Difficult:	3	17%
Very Difficult:	8	44%
Somewhat Difficult:	4	22%
Not At All Difficult:	3	17%

• **COMMUNICATION SKILLS:**

	Number of employers	Percent of employers
Extremely Difficult:	2	11%
Very Difficult:	8	44%
Somewhat Difficult:	4	22%
Not At All Difficult:	4	22%

• **STRONG WORK ETHIC:**

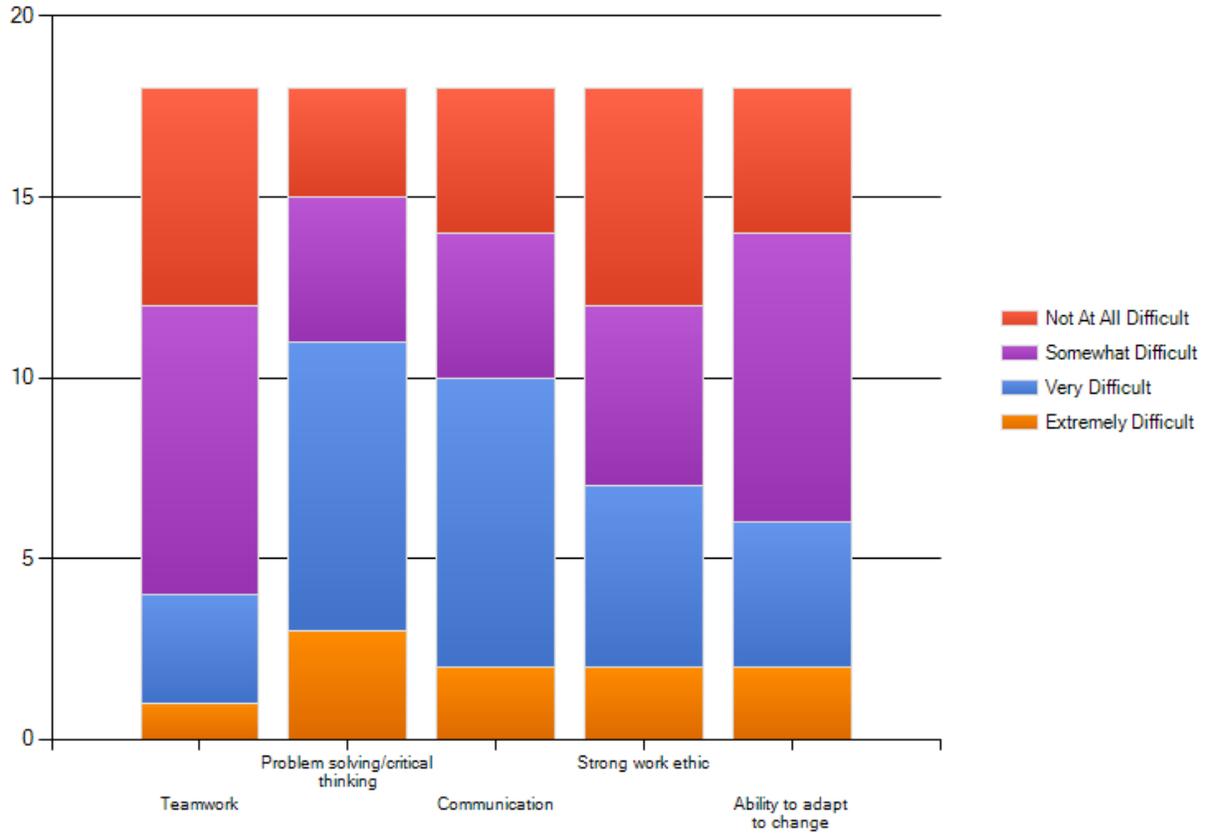
	Number of employers	Percent of employers
Extremely Difficult:	2	11%
Very Difficult:	5	28%
Somewhat Difficult:	5	28%
Not At All Difficult:	6	33%

• **ABILITY TO ADAPT TO CHANGE:**

	Number of employers	Percent of employers
Extremely Difficult:	2	11%
Very Difficult:	4	22%
Somewhat Difficult:	8	44%
Not At All Difficult:	4	22%



In general, how difficult is it for you to find new employees who possess these WORKPLACE SKILLS prior to employment:



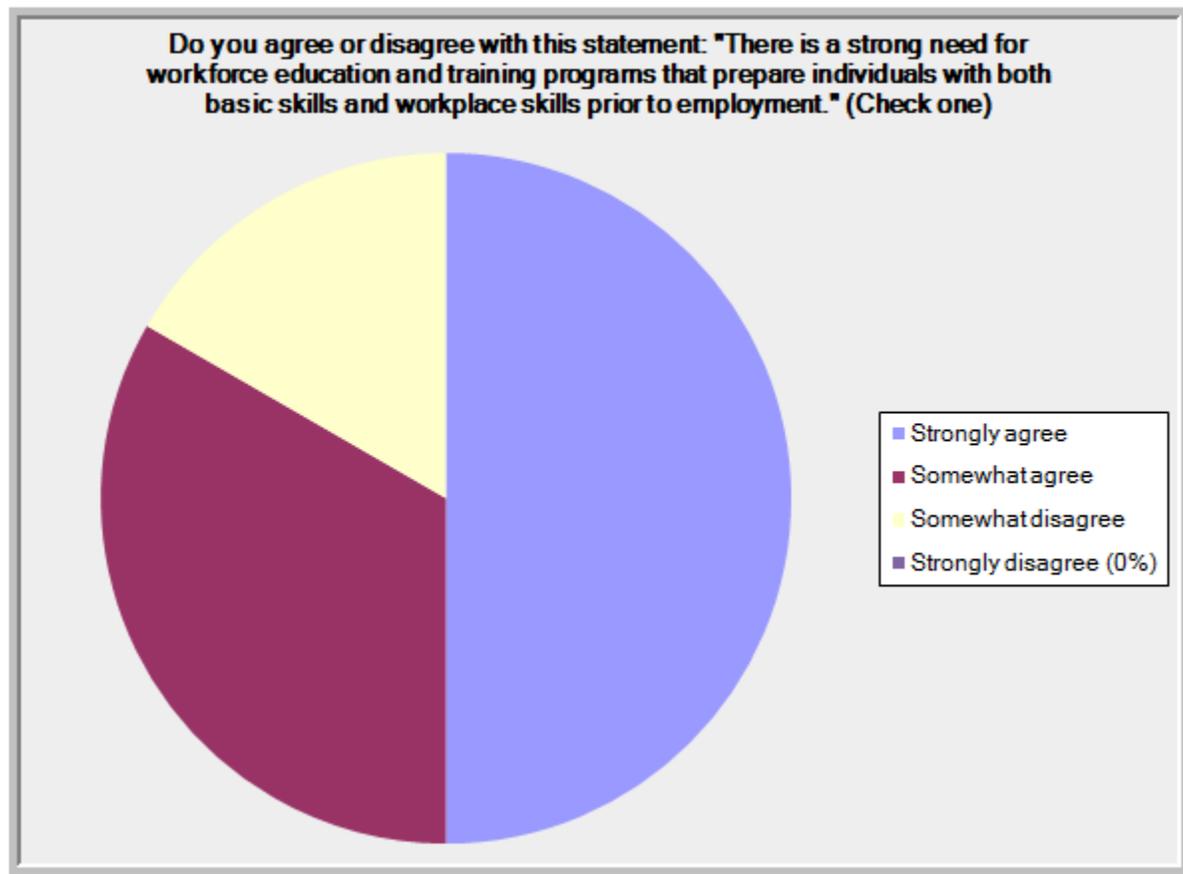


20. What JOB SPECIFIC SKILLS are difficult for you to find in new employees prior to employment?

- Ability to grasp concepts and apply learning on the job.
- Ability to lift 50 lbs.
- Basic computer skills, including Word, Excel and QuickBooks.
- Communication skills.
- Computer skills (Excel or SAP in particular) for winemaking jobs.
- Creative writing, management/leadership skills and advanced computer skills.
- Experience with Microsoft Office applications.
- For management positions, large experience on big teams.
- Keyboarding skills, supervisory skills, ability to adapt to change, product knowledge, ability to lift 50 lbs and inventory skills.
- Knowledge of winery specific software products.
- Lifting ability up to 50 lbs.
- Product and company knowledge - one would think prior to coming for an interview they would at least look at our website, but very few do.
- Professional communication skills - either face to face or via phone and internet – without sloppy language and spelling.
- Straight data entry with accuracy.
- Supervisory skills, sales skills, cost accounting, enthusiasm, customer service, listening to management.
- Supervisory skills, work ethic and enthusiasm for the job.
- Supervisory skills.
- Technical skills/ability.
- Vineyard supervisory skills.

21. Do you agree or disagree with this statement: "There is a strong need for workforce education and training programs that prepare individuals with both basic skills and workplace skills prior to employment."

	Number of employers	Percent of employers
Strongly agree:	9	50%
Somewhat agree:	6	33%
Somewhat disagree:	3	17%
Strongly disagree:	0	0%



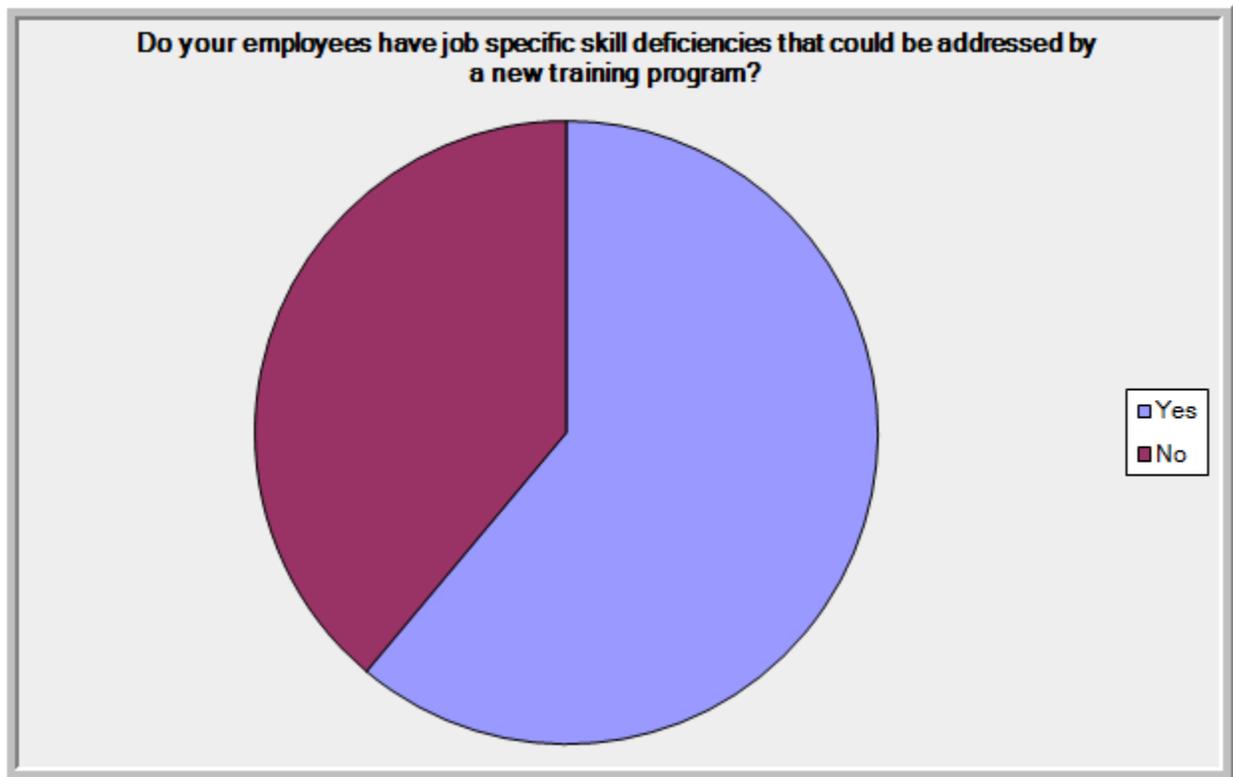
22. If you agree with the above statement, what should be the focus of the training?

- 3Rs and problem solving.
- Attention to detail, common sense and ability to work well with others and focus on job details.
- Basic knowledge of customer service, basic money skills.
- Communication in all forms, team work and computer skills.
- Communication and computer skills as well as trade skills.
- Communication and computer training.
- General computer and math skills.
- Helping the immigrant workforce adjust to our local standards and general vineyard training.
- Preparation to be productive workers. All skills need attention.
- Reading, writing, math and computer skills.
- Safety, basic math, reading and knowledge of the English language.
- Software programs that support the wine industry.



23. Do your employees have job specific skill deficiencies that could be addressed by a new training program?

	Number of employers	Percentage of Jobs
Yes:	10	70%
No:	7	28%
No response:	1	2%



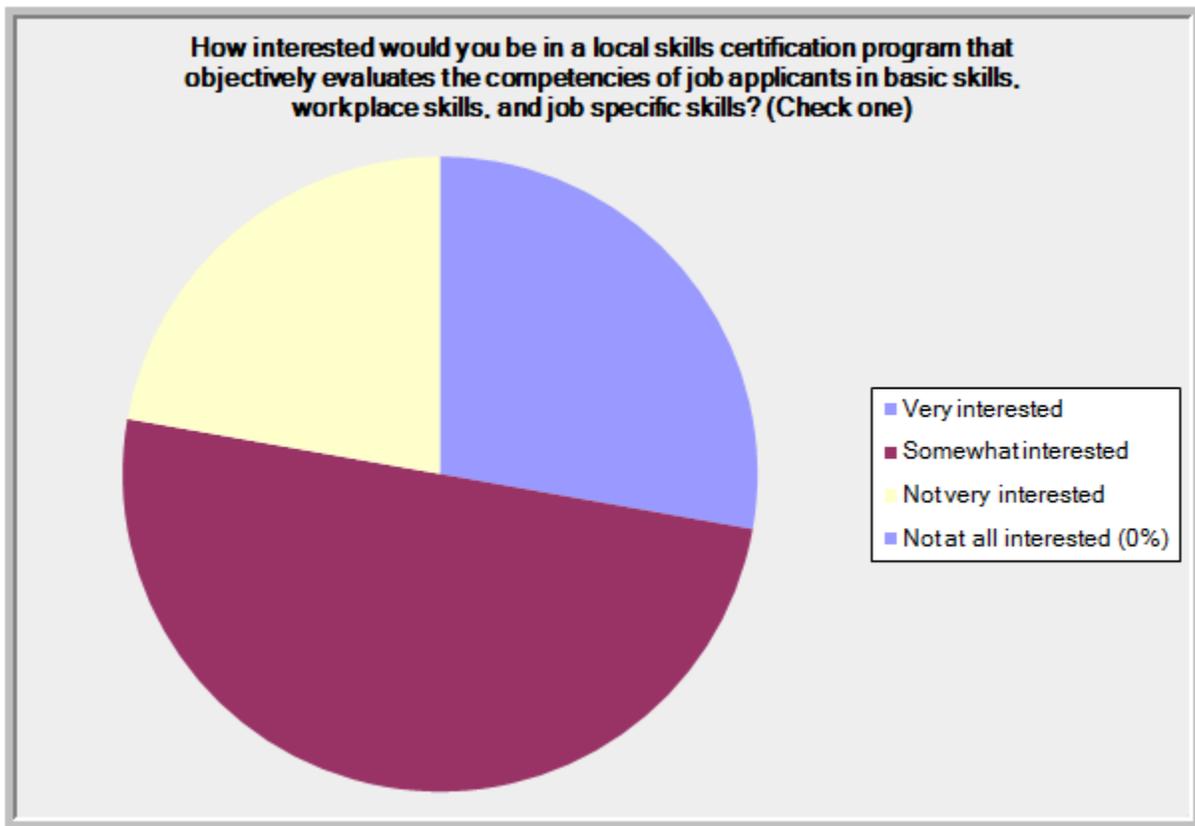
24. If YES, what kind of skill deficiencies?

- Advanced computer skills
- Basic skills such as reading, writing and arithmetic
- Communications
- Computer skills
- Computer skills
- Computer skills
- English
- English as a second language skills
- Job specific skills such as enterprise software, Microsoft Office, and PLC automated manufacturing equipment
- Professional communication skills
- Supervisory skills
- Supervisory skills for new supervisors
- Trade related skills such as carpentry, plumbing and electrical



25. How interested would you be in a local skills certification program that objectively evaluates the competencies of job applicants in basic skills, workplace skills, and job specific skills? (Check one)

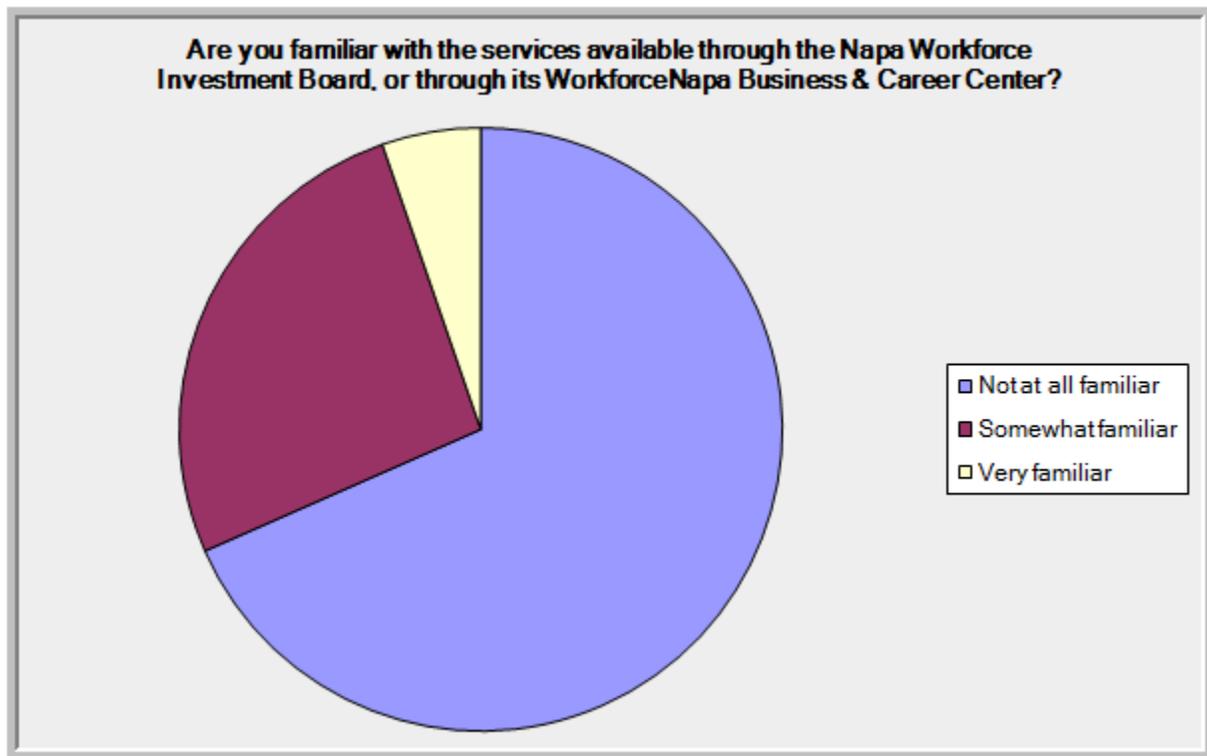
	Number of employers	Percent of employers
Very interested:	5	28%
Somewhat interested:	9	50%
Not very interested:	4	22%
Not at all interested:	0	0%





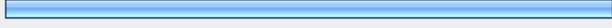
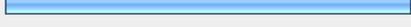
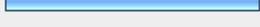
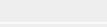
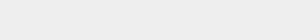
26. Are you familiar with the services available through the Napa Workforce Investment Board, or through its WorkforceNapa Business & Career Center?

	Number of employers	Percent of employers
Not at all familiar:	12	67%
Somewhat familiar:	5	28%
Very familiar:	1	5%





27. Please indicate which of the following services would be of value to you as an employer?

		Response Percent	Response Count
Recruiting or prescreening assistance		57.1%	8
On-site recruitment at the WorkforceNapa Business & Career Center		28.6%	4
Subsidized employment (e.g. on-the-job training incentives)		85.7%	12
Assistance in developing one or more internship positions (paid or unpaid)		57.1%	8
Outplacement services or lay-off assistance		35.7%	5
Understanding regulatory or legal issues		14.3%	2
How to utilize employee tax credits		42.9%	6
Developing a business plan		0.0%	0
Developing and implementing a marketing plan		7.1%	1
Strategic growth planning		7.1%	1
Business succession or employee ownership planning		0.0%	0
Business closure assistance		0.0%	0
Meeting or conference room space		7.1%	1
		<i>answered question</i>	14
		<i>skipped question</i>	4



Top Job Opportunities in the Food and Beverage Manufacturing Industry

Here are the top local job opportunities in this industry – based on what our employers have told us in our surveys and in focus group discussions. The matrix indicates whether the job is in-demand because of:

- A. Significant worker replacement needs
- B. Employer difficulty in finding qualified applicants
- C. Jobs that will offer the most new positions in the next two years

In a few cases, employers qualified the jobs by saying something like:

Production Workers with Experience with New Technology
rather than just saying *Production Workers*.

	A. Jobs with Significant Replacement Needs	B. Difficulty Finding Qualified Applicants	C. Jobs Expected to Add the Most New Positions in Next 2 Yrs
Business/Accounting Analysts		X	X
Administrative Support Workers	X		X
ATF Compliance Jobs		X	
Cellar Workers	X		X
Clamp Forklift Operators		X	
Compliance/Accounting Analyst		X	
Customer Service Reps	X	X	X
Drivers	X		X
Enologists		X	
Facilities Maintenance Workers with Skills in All Areas		X	
Financial Analysts		X	
IT Professionals	X	X	X
Kitchen Staff			X
Maintenance Mechanics		X	X
Packaging Dept. Workers	X		X
Production Supervisors			X
Production Workers			X
Production Workers with Experience with New Technology	X	X	
Quality Control Maintenance Workers		X	
Quality Control Lab Tech		X	
Restaurant Managers		X	
Retail Employees	X	X	X
Sales Reps			X
Shipping/Receiving Workers	X	X	X
Tasting Room/Hospitality Staff	X		X
Tractor Drivers	X		
Vineyard Mechanic		X	
Vineyard Workers	X		X
Viticulturist	X		
Warehouse Workers	X		X



Occupation and Training Profile

The 25 occupations profiled on the following pages are not exclusive to this industry, but are commonly found in this industry.

These occupations also do not constitute a complete list of occupations found in this industry. They are simply the 25 occupations that are most often represented by the jobs in this industry.

Wages and employment statistics are from the California Labor Market Information Division (www.labormarketinfo.edd.ca.gov). Note that wages and employment statistics for these occupations are not industry-specific.

The O*NET Link leads to a profile for each occupation that provides comprehensive information on important knowledge, skills and abilities. O*NET is from the U.S. Department of Labor and is the nation's largest database of occupational qualifications and characteristics.



Bookkeeping, Accounting, and Auditing Clerks

What do they do?

Compute, classify, and record numerical data to keep financial records complete. Perform any combination of routine calculating, posting, and verifying duties to obtain primary financial data for use in maintaining accounting records. May also check the accuracy of figures, calculations, and postings pertaining to business transactions recorded by other workers.

<i>Typical Education Level:</i>	Moderate-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$39,892
<i>Estimated Jobs in 2006 & 2016:</i>	1,150 - 1,310
<i>Projected Growth 2006-2016:</i>	13.9%
<i>Relative Growth Rate:</i>	Faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	340
<i>Training Available From:</i>	Although this is an on-the-job training type occupation, Napa Valley College has a certificate program in bookkeeping and an AS degree program in accounting.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/43-3031.00

Chief Executives

What do they do?

Determine and formulate policies and provide the overall direction of companies or private and public sector organizations within the guidelines set up by a board of directors or similar governing body. Plan, direct, or coordinate operational activities at the highest level of management with the help of subordinate executives and staff managers.

<i>Typical Education Level:</i>	Bachelor's Degree or Higher and Some Work Experience
<i>Median Annual Wage:</i>	Wage data not available for Napa County
<i>Estimated Jobs in 2006 & 2016:</i>	160 – 180
<i>Projected Growth 2006-2016:</i>	12.5%
<i>Relative Growth Rate:</i>	About average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	70
<i>Training Available From:</i>	About two-thirds of those in this occupation have a Bachelor's degree or higher, often in business administration. About 1/5 of those in this occupation have completed 1-2 years of college. Napa Valley College has various business-related certificate and Associate degree programs. Sonoma State University has both Bachelor's and Master's degree programs in business administration and is also home to the Wine Business Institute. Pacific Union College also offers Bachelor's degree programs in business administration.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/11-1011.00



Customer Service Representatives

What do they do?

Interact with customers to provide information in response to inquiries about products and services and to handle and resolve complaints.

<i>Typical Education Level:</i>	Moderate-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$36,111
<i>Estimated Jobs in 2006 & 2016:</i>	700 - 890
<i>Projected Growth 2006-2016:</i>	27.1%
<i>Relative Growth Rate:</i>	Much faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	380
<i>Training Available From:</i>	Although this is an on-the-job training type occupation, Napa Valley College has several programs that include customer service training: Business and Commerce (AS); Business: Office Administration (certificate & AS); and Hospitality & Tourism Management (certificate & AS)
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/43-4051.00

Driver/Sales Workers

What do they do?

Drive truck or other vehicle over established routes or within an established territory and sell goods, such as food products, including restaurant take-out items, or pick up and deliver items, such as laundry. May also take orders and collect payments. Includes newspaper delivery drivers.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$23,029
<i>Estimated Jobs in 2006 & 2016:</i>	100 – 130
<i>Projected Growth 2006-2016:</i>	30.0%
<i>Relative Growth Rate:</i>	Much faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	50
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/53-3031.00



Farmworkers and Laborers, Crop, Nursery, and Greenhouse

What do they do?

Manually plant, cultivate, and harvest vegetables, fruits, nuts, horticultural specialties, and field crops. Use hand tools, such as shovels, trowels, hoes, tampers, pruning hooks, shears, and knives. Duties may include tilling soil and applying fertilizers; transplanting, weeding, thinning, or pruning crops; applying pesticides; cleaning, grading, sorting, packing and loading harvested products. May construct trellises, repair fences and farm buildings, or participate in irrigation activities.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$24,616
<i>Estimated Jobs in 2006 & 2016:</i>	4,060 - 5,290
<i>Percent Change 2006-2016:</i>	30.3%
<i>Relative Growth Rate:</i>	Much faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	2,250
<i>Training Available From:</i>	Although this is an on-the-job training type occupation, Napa Valley College has various certificate and degree programs in Agriculture/Viticulture.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/45-2092.00

First-Line Supervisors/Managers of Production and Operating Workers

What do they do?

Supervise and coordinate the activities of production and operating workers, such as inspectors, precision workers, machine setters and operators, assemblers, fabricators, and plant and system operators.

<i>Typical Education Level:</i>	Work Experience in a Related Occupation
<i>Median Annual Wage:</i>	\$68,018
<i>Estimated Jobs in 2006 & 2016:</i>	500 – 570
<i>Projected Growth 2006-2016:</i>	14.0%
<i>Relative Growth Rate:</i>	Faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	150
<i>Training Available From:</i>	Napa Valley College has a Viticulture and Winery Technology certificate program that includes production-oriented courses in both viticulture and winemaking.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/51-1011.00



Food Scientists and Technologists, including Enologists

What do they do?

Use chemistry, microbiology, engineering, and other sciences to study the principles underlying the processing and deterioration of foods; analyze food content to determine levels of vitamins, fat, sugar, and protein; discover new food sources; research ways to make processed foods safe, palatable, and healthful; and apply food science knowledge to determine best ways to process, package, preserve, store, and distribute food.

<i>Typical Education Level:</i>	Bachelor's Degree
<i>Median Annual Wage:</i>	\$64,100 (California)
<i>Estimated Jobs in 2006 & 2016:</i>	1,100 - 1,300 (California)
<i>Percent Change 2006-2016:</i>	18.0% (California)
<i>Relative Growth Rate:</i>	Faster than average growth (California)
<i>Job Openings from Growth and Replacements 2006-2016:</i>	50 (California)
<i>Training Available From:</i>	Winemaking certificate and degree programs are available from Napa Valley College, Santa Rosa Junior College, and UC Davis. Employers emphasize, however, that becoming a winemaker usually requires a Bachelor's degree from a program such as that offered by UC Davis.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/19-1012.00

General and Operations Managers

What do they do?

Plan, direct, or coordinate the operations of companies or public and private sector organizations. Duties and responsibilities include formulating policies, managing daily operations, and planning the use of materials and human resources, but are too diverse and general in nature to be classified in any one functional area of management or administration, such as personnel, purchasing, or administrative services. Includes owners and managers who head small business establishments whose duties are primarily managerial.

<i>Typical Education Level:</i>	Bachelor's Degree or Higher and Some Work Experience
<i>Median Annual Wage:</i>	\$120,846
<i>Estimated Jobs in 2006 & 2016:</i>	1,170 - 1,240
<i>Projected Growth 2006-2016:</i>	6.0%
<i>Relative Growth Rate:</i>	Grow more slowly than average
<i>Job Openings from Growth and Replacements 2006-2016:</i>	350
<i>Training Available From:</i>	About half of those in this occupation have a Bachelor's degree or higher, often in business administration. About 1/3 of those in this occupation have completed 1-2 years of college. Napa Valley College has various business-related certificate and Associate degree programs. Sonoma State University has both Bachelor's and Master's degree programs in business administration and is also home to the Wine Business Institute. Pacific Union College also offers Bachelor's degree programs in business administration.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/11-1021.00



Helpers--Production Workers

What do they do?

Help production workers by performing duties of lesser skill. Duties include supplying or holding materials or tools, and cleaning work area and equipment.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$25,472
<i>Estimated Jobs in 2006 & 2016:</i>	70 - 80
<i>Percent Change 2006-2016:</i>	14.3%
<i>Relative Growth Rate:</i>	Faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	30
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/51-9198.00

Industrial Production Managers

What do they do?

Plan, direct, or coordinate the work activities and resources necessary for manufacturing products in accordance with cost, quality, and quantity specifications.

<i>Typical Education Level:</i>	Bachelor's Degree
<i>Median Annual Wage:</i>	\$97,667
<i>Estimated Jobs in 2006 & 2016:</i>	180 – 210
<i>Percent Change 2006-2016:</i>	16.7%
<i>Relative Growth Rate:</i>	Faster than average growth
<i>Growth & Replacement Openings:</i>	90
<i>Training Available From:</i>	Because of the diversity of manufacturing operations, there is no standard educational preparation for this occupation. However, about 45% of new hires for this occupation have a Bachelor's degree or higher, often in business administration. About 1/3 of those in this occupation have completed 1-2 years of college. Napa Valley College has various business-related certificate and Associate degree programs. Sonoma State University has both Bachelor's and Master's degree programs in business administration and is also home to the Wine Business Institute. Pacific Union College also offers Bachelor's degree programs in business administration.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/11-3051.00



Industrial Truck and Tractor (Forklift) Operators

What do they do?

Operate industrial trucks or tractors equipped to move materials around a warehouse, storage yard, factory, construction site, or similar location.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$33,464
<i>Estimated Jobs in 2006 & 2016:</i>	530 - 570
<i>Projected Growth 2006-2016:</i>	7.5%
<i>Relative Growth Rate:</i>	Grow more slowly than average
<i>Job Openings from Growth and Replacements 2006-2016:</i>	170
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/53-7051.00

Inspectors, Testers, Sorters, Samplers, and Weighers

What do they do?

Inspect, test, sort, sample, or weigh nonagricultural raw materials or processed, machined, fabricated, or assembled parts or products for defects, wear, and deviations from specifications. May use precision measuring instruments and complex test equipment.

<i>Typical Education Level:</i>	Moderate-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$31,986
<i>Estimated Jobs in 2006 & 2016:</i>	240 – 200
<i>Projected Growth 2006-2016:</i>	-16.7%
<i>Relative Growth Rate:</i>	Decline rapidly
<i>Job Openings from Growth and Replacements 2006-2016:</i>	40
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/51-9061.00



Janitors and Cleaners, Except Maids and Housekeeping Cleaners

What do they do?

Keep buildings in clean and orderly condition. Perform heavy cleaning duties, such as cleaning floors, shampooing rugs, washing walls and glass, and removing rubbish. Duties may include tending furnace and boiler, performing routine maintenance activities, notifying management of need for repairs, and cleaning snow or debris from sidewalk.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$25,156
<i>Estimated Jobs in 2006 & 2016:</i>	980 - 1,140
<i>Projected Growth 2006-2016:</i>	16.3%
<i>Relative Growth Rate:</i>	Faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	350
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/37-2011.00

Laborers and Freight, Stock, and Material Movers

What do they do?

Manually move freight, stock, or other materials or perform other unskilled general labor. Includes all unskilled manual laborers not elsewhere classified.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$27,704
<i>Estimated Jobs in 2006 & 2016:</i>	740 - 810
<i>Projected Growth 2006-2016:</i>	9.5%
<i>Relative Growth Rate:</i>	About average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	310
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/53-7062.00



Maintenance and Repair Workers, General

What do they do?

Perform work involving the skills of two or more maintenance or craft occupations to keep machines, mechanical equipment, or the structure of an establishment in repair. Duties may involve pipe fitting; boiler making; insulating; welding; machining; carpentry; repairing electrical or mechanical equipment; installing, aligning, and balancing new equipment; and repairing buildings, floors, or stairs.

<i>Typical Education Level:</i>	Long-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$40,691
<i>Estimated Jobs in 2006 & 2016:</i>	780 - 870
<i>Projected Growth 2006-2016:</i>	11.5%
<i>Relative Growth Rate:</i>	About average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	110
<i>Training Available From:</i>	Although this is an on-the-job training type occupation, any shop/trades related courses would be good for picking up new skills and knowledge that will be useful for this occupation. Weatherization skills should prove to be particularly useful in the future because of the need to make homes and building more energy efficient and less wasteful.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/49-9042.00

Mixing and Blending Machine Setters, Operators, and Tenders

What do they do?

Set up, operate, or tend machines to mix or blend materials, such as chemicals, tobacco, liquids, color pigments, or explosive ingredients.

<i>Typical Education Level:</i>	Moderate-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$30,824
<i>Estimated Jobs in 2006 & 2016:</i>	110 - 130
<i>Percent Change 2006-2016:</i>	18.2%
<i>Relative Growth Rate:</i>	Faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	40
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/51-9023.00



Packaging and Filling Machine Operators and Tenders

What do they do?

Operate or tend machines to prepare industrial or consumer products for storage or shipment. Includes cannery workers who pack food products.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$27,970
<i>Estimated Jobs in 2006 & 2016:</i>	450 – 470
<i>Percent Change 2006-2016:</i>	4.4%
<i>Relative Growth Rate:</i>	Slower than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	100
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/51-9111.00

Production, Planning, and Expediting Clerks

What do they do?

Coordinate and expedite the flow of work and materials within or between departments of an establishment according to production schedule. Duties include reviewing and distributing production, work, and shipment schedules; conferring with department supervisors to determine progress of work and completion dates; and compiling reports on progress of work, inventory levels, costs, and production problems.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$43,805
<i>Estimated Jobs in 2006 & 2016:</i>	120 - 140
<i>Percent Change 2006-2016:</i>	16.7%
<i>Relative Growth Rate:</i>	Faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	50
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/43-5061.00



Retail Salespersons

What do they do?

Sell merchandise, such as furniture, motor vehicles, appliances, or apparel in a retail establishment.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$24,239
<i>Estimated Jobs in 2006 & 2016:</i>	2,710 - 3,160
<i>Percent Change 2006-2016:</i>	16.6%
<i>Relative Growth Rate:</i>	Faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	1,290
<i>Training Available From:</i>	Although this is an on-the-job training type occupation, any courses in business, marketing or sales would be good for picking up new skills and knowledge that will make an individual more employable and be helpful for career advancement purposes. Napa Valley College has programs in Wine Marketing and Sales (certificate and AS degree) and Business and Commerce (AS degree).
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/41-2031.00

Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products

What do they do?

Sell goods for wholesalers or manufacturers to businesses or groups of individuals. Work requires substantial knowledge of items sold.

<i>Typical Education Level:</i>	Moderate-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$72,738
<i>Estimated Jobs in 2006 & 2016:</i>	800 - 1,000
<i>Projected Growth 2006-2016:</i>	25.0%
<i>Relative Growth Rate:</i>	Much faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	380
<i>Training Available From:</i>	Although this is an on-the-job training type occupation, most employers require previous sales experience and prefer the completion of some college coursework. About half of the new hires in this occupation have a Bachelor's degree or higher. Courses in marketing, economics and communication will all help make an individual more employable and a more effective sales rep. These types of courses are available through Napa Valley College.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/41-4012.00



Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products

What do they do?

Sell goods for wholesalers or manufacturers where technical or scientific knowledge is required in such areas as biology, engineering, chemistry, and electronics, normally obtained from at least 2 years of post-secondary education.

<i>Typical Education Level:</i>	Moderate-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$73,173
<i>Estimated Jobs in 2006 & 2016:</i>	150 - 180
<i>Percent Change 2006-2016:</i>	20.0%
<i>Relative Growth Rate:</i>	Much faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	60
<i>Training Available From:</i>	Although this is an on-the-job training type occupation, most employers require previous sales experience and many also require a Bachelor's degree or the completion of 1-2 years of college. More than half of the new hires in this occupation have a Bachelor's degree or higher. Courses and programs in a technology or science subject area, as well as in marketing, economics and communication will all help make an individual more employable and a more effective sales rep. These types of courses and programs are available through Napa Valley College and Sonoma State University.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/41-4011.00

Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders

What do they do?

Set up, operate, or tend continuous flow or vat-type equipment; filter presses; shaker screens; centrifuges; condenser tubes; precipitating, fermenting, or evaporating tanks; scrubbing towers; or batch stills. These machines extract, sort, or separate liquids, gases, or solids from other materials to recover a refined product. Includes dairy processing equipment operators.

<i>Typical Education Level:</i>	Moderate-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$50,710
<i>Estimated Jobs in 2006 & 2016:</i>	870 - 1,070
<i>Percent Change 2006-2016:</i>	23.0%
<i>Relative Growth Rate:</i>	Much faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	400
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/51-9012.00



Truck Drivers, Heavy and Tractor-Trailer

What do they do?

Drive a tractor-trailer combination or a truck with a capacity of at least 26,000 GVW, to transport and deliver goods, livestock, or materials in liquid, loose, or packaged form. May be required to unload truck. May require use of automated routing equipment. Requires commercial drivers' license.

<i>Typical Education Level:</i>	Moderate-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$42,181
<i>Estimated Jobs in 2006 & 2016:</i>	360 - 480
<i>Projected Growth 2006-2016:</i>	33.3%
<i>Relative Growth Rate:</i>	Much faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	180
<i>Training Available From:</i>	Although this is an on-the-job training type occupation, many truck drivers attend a truck driver training program at their own expense. Others are trained by their employer. No local certificate training programs identified for this occupation.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/53-3032.00

Truck Drivers, Light or Delivery Services

What do they do?

Drive a truck or van with a capacity of under 26,000 GVW, primarily to deliver or pick up merchandise or to deliver packages within a specified area. May require use of automatic routing or location software. May load and unload truck.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$24,287
<i>Estimated Jobs in 2006 & 2016:</i>	310 – 380
<i>Projected Growth 2006-2016:</i>	22.6
<i>Relative Growth Rate:</i>	Much faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	130
<i>Training Available From:</i>	Although this is an on-the-job training type occupation, many truck drivers attend a truck driver training program at their own expense. Others are trained by their employer. No local certificate training programs identified for this occupation.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/53-3033.00



Waiters and Waitresses

What do they do?

Take orders and serve food and beverages to patrons at tables in dining establishment.

<i>Typical Education Level:</i>	Short-Term On-the-Job Training
<i>Median Annual Wage:</i>	\$17,184
<i>Estimated Jobs in 2006 & 2016:</i>	1,270 - 1,460
<i>Percent Change 2006-2016:</i>	15.0%
<i>Relative Growth Rate:</i>	Faster than average growth
<i>Job Openings from Growth and Replacements 2006-2016:</i>	880
<i>Training Available From:</i>	No local certificate training programs identified.
<i>O*NET Link:</i>	http://online.onetcenter.org/link/summary/35-3031.00



Challenges and Recommendations

Challenges

A. We lack an adequate supply of local workers who are qualified for the jobs in this industry

Our survey of the food and beverage manufacturing industry indicates that 35% of the local jobs in this industry are filled by workers who live outside Napa County. This suggests that we lack an adequate supply of local workers who are qualified for those jobs.

Lack of affordable housing in Napa is, of course, an important factor. Some of Napa County's workers simply cannot afford to live in Napa County.

Although industry employers did not indicate in focus group discussions or surveys that they had difficulty finding qualified applicants for most jobs, they did indicate a serious concern about basic and workplace skill deficiencies among job applicants – especially for those jobs that don't require a 4-year college degree.

Commute patterns into and out of Napa County (from the 2000 Census) indicate that more people commute into Napa than commute out of Napa for jobs:

Total number of non-Napa County residents commuting into Napa for Napa jobs: 15,534

Total number of Napa County residents commuting out of Napa for their jobs: 13,052

B. Need to strengthen our local and regional economies to create a stronger and more resilient job market

Our survey indicates that, in the last year, only about 22% of the employers in this industry increased their payrolls. It is well documented that this has been a common problem for most industries due to the severe economic recession we have had and are continuing to experience. In fact, some industries, such as construction, have been decimated by the recession. But this does raise the question as to what strategies can be used to strengthen our local and regional economies in order to create a stronger and more resilient job market?

C. Need to address basic skills, workplace skills, and specific knowledge and skill deficiencies identified by local employers

The majority of employers expressed serious concerns about basic skill and workplace skill deficiencies among job applicants. For example, two-thirds of the employers surveyed reported that they have difficulty finding new employees with adequate math skills. The range of skill deficiencies includes:

- Reading skills
- Writing skills
- Math skills
- Basic computer skills
- Teamwork skills
- Problem solving and critical thinking skills
- Communication skills
- Strong work ethic
- Ability to adapt to change



These are the specific knowledge and skill areas reported by employers to be in short supply for jobs (in general) in this industry:

- Attention to Detail
- Common Sense
- Communication Skills
- Compliance Knowledge
- Computer/Keyboarding Skills
- Critical Thinking Skills
- Customer Service Skills
- English Language Skills
- Manufacturing Skills
- Math Skills
- MS Office Skills, especially Word & Excel
- Phone Etiquette
- Reading Comprehension Skills
- Supervisory Skills
- Mechanical Skills for Vineyards
- Writing Skills

Employers also reported that we lack local classes and programs for high school students to learn hands-on the technical skills needed for local production, mechanical and manufacturing jobs in this industry.

In terms of job specific skills that are in short supply among job applicants, the most frequently noted skill (in short supply) was related to computers. In some cases, employers want them to have knowledge of specific software products. In other cases, the focus is on basic computer and keyboarding skills. The second most frequently noted skill (in short supply) was supervisory skills.

The vast majority of employers surveyed (83%) agreed that there is *a strong need for workforce education and training programs that prepare individuals with both basic skills and workplace skills prior to employment.*

Nearly 80% of employers surveyed report that they would be interested in a local skills certification program that objectively evaluates the competencies of job applicants in basic skills, workplace skills, and job specific skills.

The above findings indicate some serious challenges in being able to provide an adequate supply of qualified workers for jobs in this industry. And yet our economy depends on exactly that: having an adequate supply of qualified workers.

Recommendations

1. Establish an Industry Skill Panel

Establish an industry-based and industry-driven “Skill Panel” to advise and inform the education, training and workforce development sectors while representing the workforce and workforce development interests of the food and beverage manufacturing industry in Napa County.

The Skill Panel will serve to:

- Continuously inform our education, training and workforce development partners
- Communicate resources and strategies to other industry employers
- Support and communicate labor market and workforce information to industry employers
- Certify education and training programs that meet industry standards
- Identify and communicate employment, training and internship opportunities
- Support and encourage collaboration on initiatives that address fundamental industry challenges
- Develop and implement a public awareness campaign to inform Napa residents about the challenges and opportunities that the industry faces, including promoting the image of the industry as a desirable career choice
- Engage high profile industry leaders to promote strategies and initiatives aimed at addressing the industry’s major challenges
- Develop incentives that encourage students to participate in work experience programs in the food and beverage manufacturing industry (i.e. secondary and postsecondary vocational and technical training, co-op placements, internships, work experience placements, etc.)
- Support and promote vocational and technical training programs (i.e. local ROP/Career Technical Education programs)
- Increase information sharing regarding effective worker recruitment, training and retention practices



2. Develop a local Education and Training Consortium and develop/provide programs and courses to help meet industry workforce needs

Develop a local education and training consortium focused on basic employability skills and job specific skills designed to meet the needs of the food and beverage manufacturing industry in Napa County.

The consortium will be comprised of the following education, training and workforce development partners:

- Napa County Office of Education (including ROP/Career Technical Education)
- Public school districts (that include high schools):
 - Calistoga Unified School District
 - Napa Valley Unified School District (including the Napa Valley Adult School)
 - St. Helena Unified School District
- Napa Valley College
- Napa County Workforce Investment Board
- Private sector education and training providers

The workforce development strategies of the consortium must also address the fact that many of the younger jobseekers who are interested in jobs in this industry lack the necessary workplace readiness skills that both jobseekers and employers need. This includes students currently in the K-12 system, as well as students who have left school (without graduating) and others who have graduated but lack workplace readiness skills. To help prepare a skilled and qualified workforce, the consortium must work closely with the skill panel to develop and implement a school-based training certificate program to ensure that greater numbers of high school students and young job seekers receive workplace readiness skill training. With skills such as teamwork, communication, problem solving and critical thinking applicable to all disciplines, these skills can be recognized or incorporated into existing programs and curricula. Students and young adults demonstrating qualities such as showing up on time and exhibiting responsibility and initiative could be recognized in the high school, adult education and community college experience as workplace readiness skills. This certificate program would reward students for promising behavior such as consistently high attendance rates, above average academic performance, finishing their junior year on time, and taking initiative by enrolling in extra courses. Industry employers could agree to accept the certificate as evidence of workforce preparedness for entry-level jobs.

The consortium will establish an articulated subsidized and unsubsidized internship/work experience program between K-12, adult education, community college, and the WorkforceNapa Business & Career Center. This program should have an extremely robust employer site identification system. The program will establish and implement:

- Subsidized and unsubsidized on-the-job training
- Subsidized employment
- Expanded work experience program
- Unsubsidized internships

The consortium will also serve to:

- Articulate basic employability skills between local public education and training programs (Adult Ed, Community College, NCOE/K-12 system)
- Establish a link between the industry skill panel and local career guidance counselors at schools and training institutions
- Identify workplace expectations modules, especially for small and growing businesses
- Provide information about relevant programs and initiatives to industry partners
- Develop and implement a public awareness campaign to inform Napa students and job seekers about the career opportunities that the industry offers to Napa County residents
- Advocate to increase funds for literacy, basic skills, ESL, and incumbent worker training
- Work collaboratively with the industry skill panel to aggressively seek public and private grant resources and expand capacity of existing education and training resources (includes customer service and supervisory skills training modules)



3. Establish a skills assessment certificate program for students and job seekers

Establish an objective skills assessment certificate program for students and job seekers who wish to improve their chances of employment and career advancement within the food and beverage manufacturing industry in Napa County. Such a certificate program would need to be approved and supported by both the industry skill panel and the education and training consortium.

The Napa County Workforce Investment Board has been offering and testing a nationally recognized skills certificate program called WorkKeys – which might be an ideal solution. WorkKeys, which measures and certifies basic employability skills, as well as technical skills, is appropriate for both adults and for secondary and postsecondary student populations, and can be adapted to any industry.

Ideally, all interested students and job seekers interested in the food and beverage manufacturing industry would be referred to a single point of contact where they can undergo the assessment. One possibility for this would be the community-based WorkforceNapa Business & Career Center.

4. Provide a single point of contact for industry employers

Provide a single point of contact for industry employers who need to know what education, training, workforce development, and economic development resources exist in Napa County. This includes resources for incumbent worker training.

5. Provide the necessary information

Ensure that the necessary information is developed, available and accessible for planning and implementing all the above activities and programs, including needs assessments and continuing studies of the industry's workforce needs.