

San Joaquin Council of Governments Speaker Series

June 28, 2022

June 2022

NSJV COVID-19 Impact Review

North San Joaquin Valley

UNIVERSITY OF THE
PACIFIC

Center for Business
and Policy Research

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Agenda:

- **Introduction SJCOG Speaker Series**
 - Jay Halva, Assistant Regional Planner
- ***The NSJV COVID-19 Impact Review***
 - NSJV Economy and COVID-19
 - Dr. Jeffrey Michael, Director Public Policy Programs & Senior Fellow, CBPR
 - NSJV People & Society and COVID-19
 - NSJV As a Place and COVID-19
 - Dr. Thomas Pogue, Executive Director, CBPR
 - Questions?
- **An overview of the NSJV's response efforts through CERF**
 - Bob Gutierrez, President San Joaquin Partnership
 - Questions?

The NSJV COVID-19 Impact Review

NSJV Economy and COVID-19



PART-ONE: NSJV Economy and COVID-19

Employment

Gross Domestic Product (Output)

Income

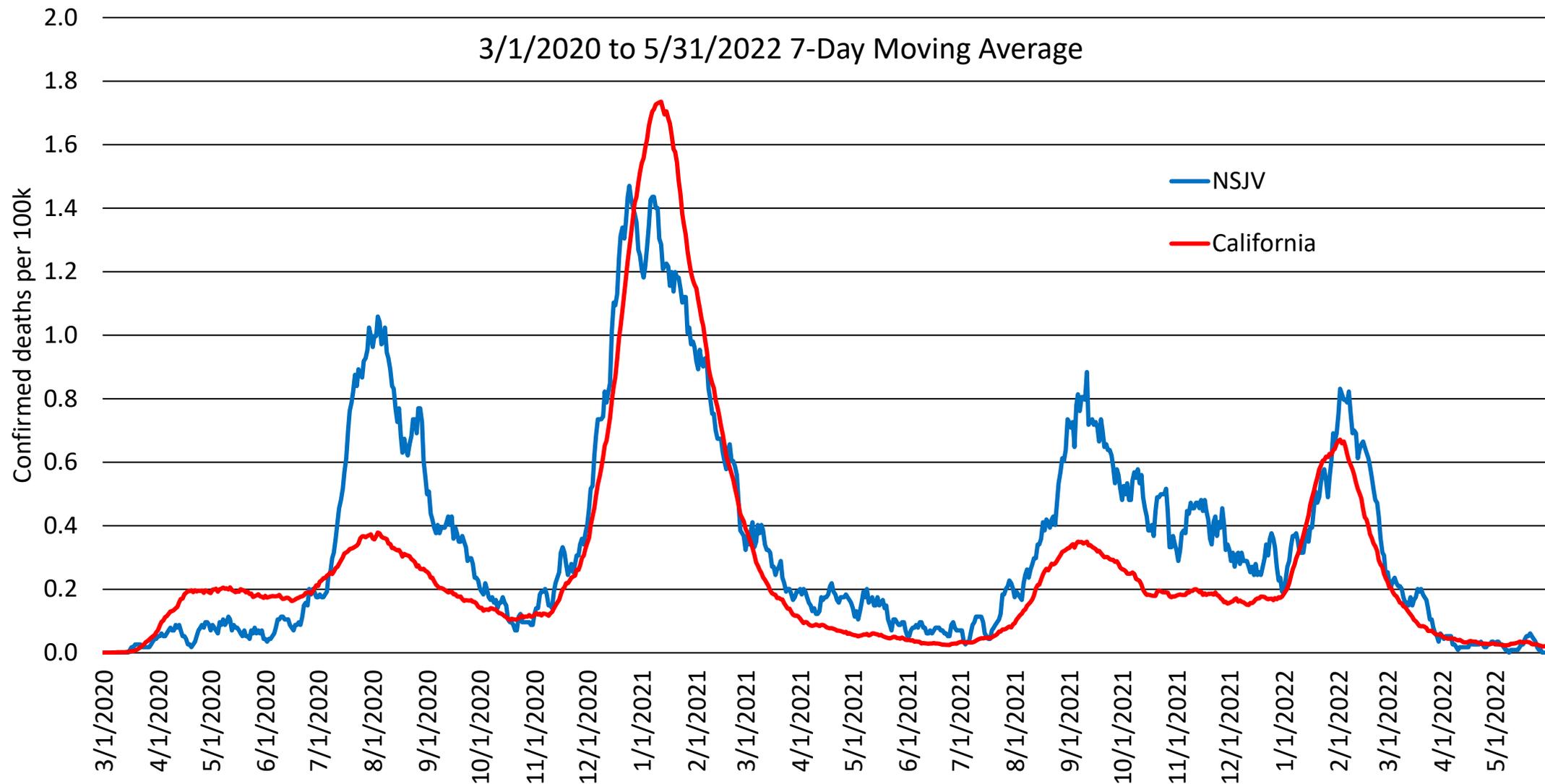
Impacts on Agriculture

Impacts on the Health Care System

Impacts on Entrepreneurship

Impacts on Transportation and Warehousing

Comparative COVID-19 Mortality Rates



Economic Impact Drivers

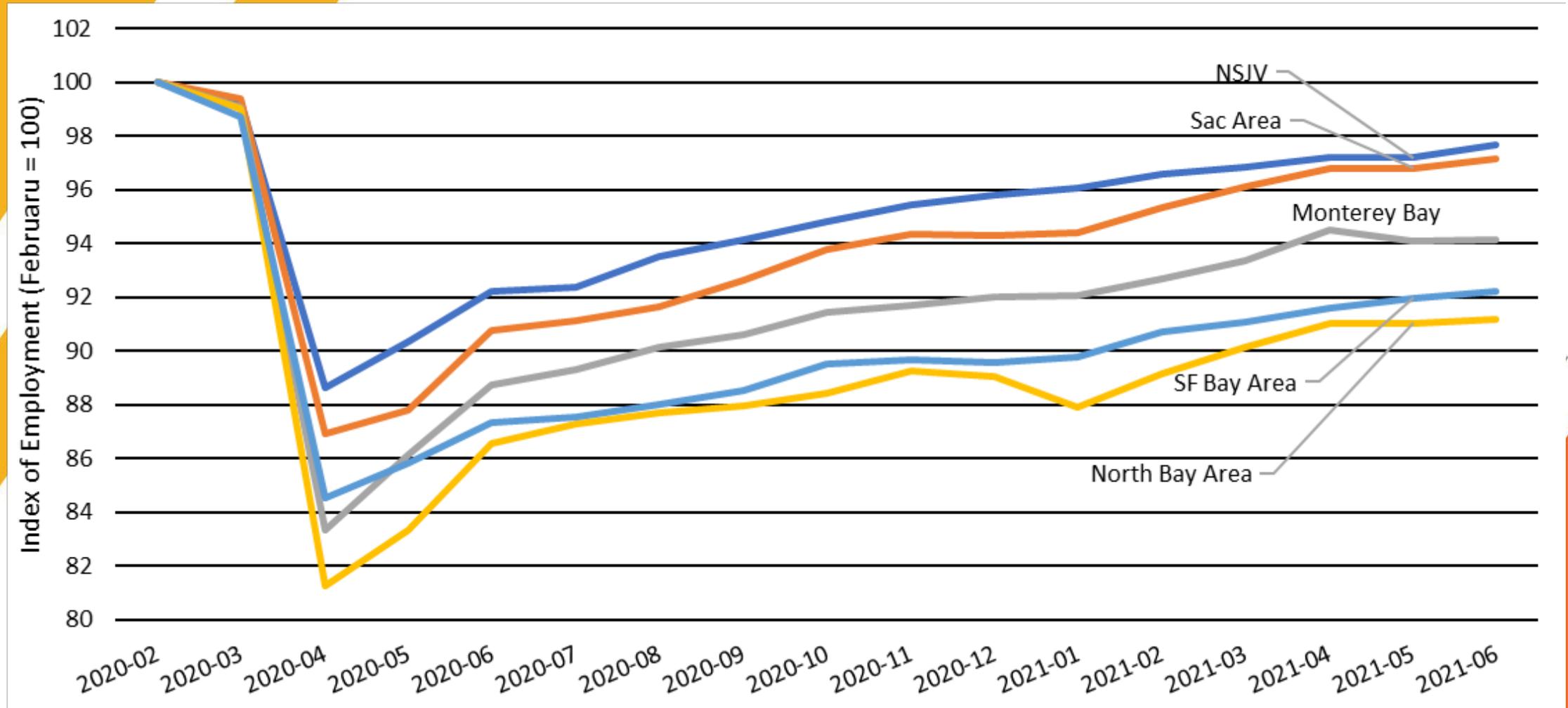
- Unique NSJV characteristics drive economic impacts
 - Industry mix
 - Regulatory environment
 - Mega-region linkages
 - Behavior, vaccination rates.
- Pandemic accelerated the digitization of the economy:
 - Remote work
 - E-commerce
 - Automation
- Growing linkages across northern California

Regional Differences in Key Covid Impacted Sectors Six Months Into Pandemic

Employment Change Sept 2019-20, Source: QCEW

Region	Trade, Transportation and Utilities	Information	Leisure and Hospitality
San Francisco Bay Area	-11%	3%	-45%
North San Francisco Bay Area	-5%	-8%	-34%
Sacramento Area	-2%	-17%	-27%
North San Joaquin Valley Area	3%	-34%	-21%
Monterey Bay Area	-7%	-22%	-33%

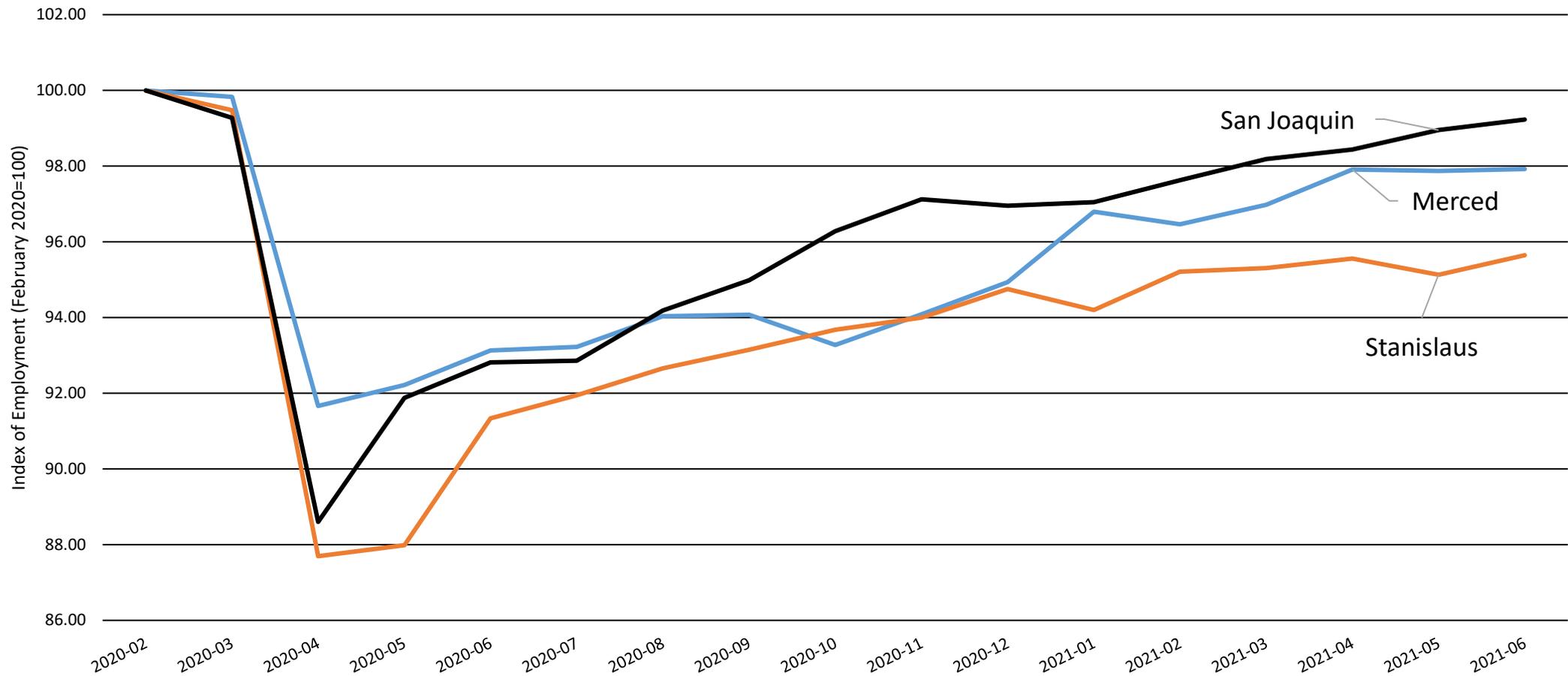
Relative Employment Impacts: MegaRegion



QCEW data seasonally adjusted by CBPR.

Most recent EDD data shows inland regions have mostly recovered lost employment, whereas coastal areas are still about 5% below pre-pandemic employment.

Relative Employment Impacts: NSJV



QCEW data seasonally adjusted by CBPR.

Most recent EDD data shows San Joaquin and Merced have fully recovered lost employment, whereas Stanislaus County is still slightly below pre-pandemic employment.

Analysis of NSJV Job Advertisements Show That Desired Qualifications Declined During the Pandemic

	03/01/2019-02/29/2020	03/01/2020-02/28/2021	% Change
High school or vocational training	36%	40%	5%
Associate's degree	16%	18%	2%
Bachelor's degree	35%	30%	-5%
Master's degree	10%	8%	-2%
Doctoral degree	3%	3%	0%
Total*	48,553	53,682	5,129
* =Total positions where qualifications were specified			

Burning Glass Data

Less than BA ads grew by nearly 7,000, While BA+ ads declined by almost 2,000.

Analysis of Experience Shows a Similar Decline in Qualifications

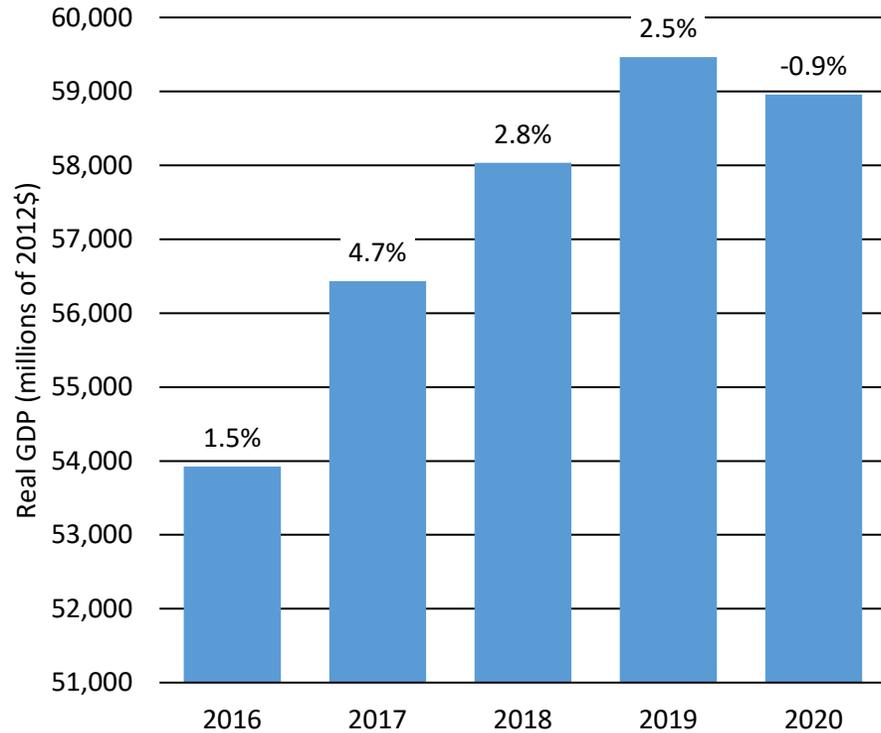
NSJV: Only part of MegaRegion where the Labor Force Grew in 2020

County Name/State Abbreviation		Labor Force
SF Bay Area		-3.4%
North Bay Area		-4.4%
Greater Sacramento		-0.9%
South San Joaquin Valley		-1.2%
North San Joaquin Valley		0.4%
Monterey Bay Area		-4.0%

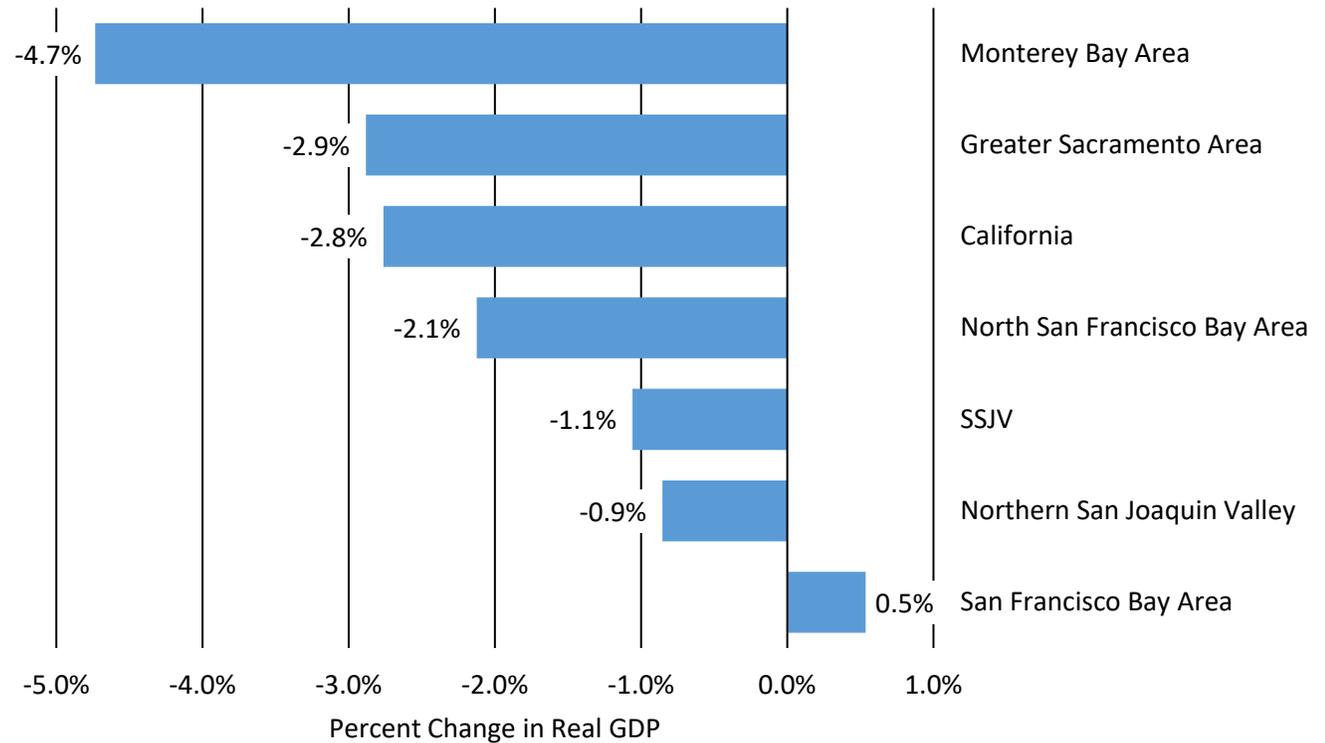
Economic Output: NSJV 1/3 GDP decline of CA

Bay Area Had Highest Job Loss, but Best GDP Growth!

NSJV Real GDP: Double-digit gains in Warehousing and Ag offset declines

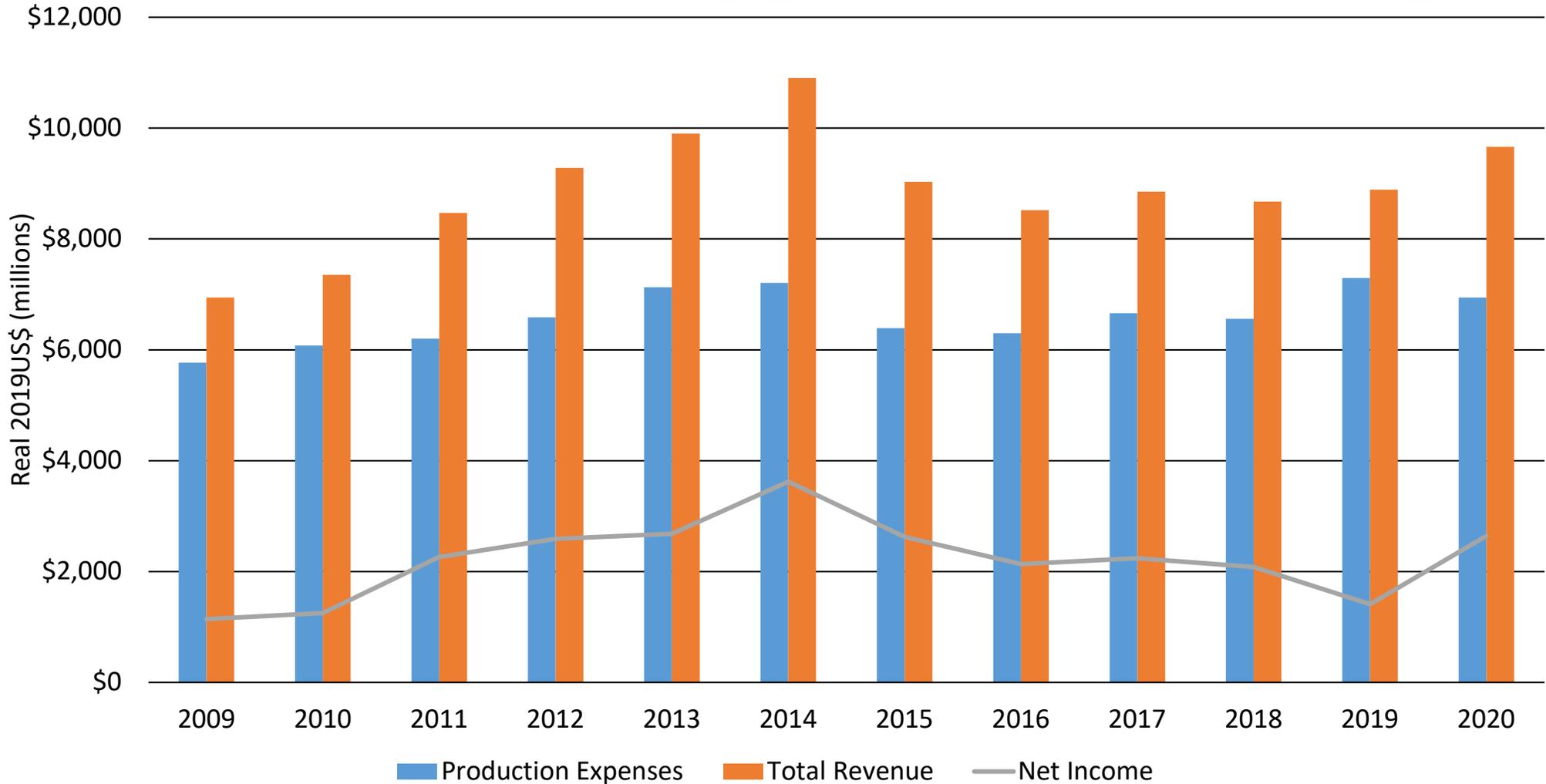


Real GDP Regional Comparison: Massive growth in Tech output offsets huge job loss in low-wage sectors.



Farm Income and Expenses: Large growth in output and income in 2020.

Real dollar income approached 2014 peak.



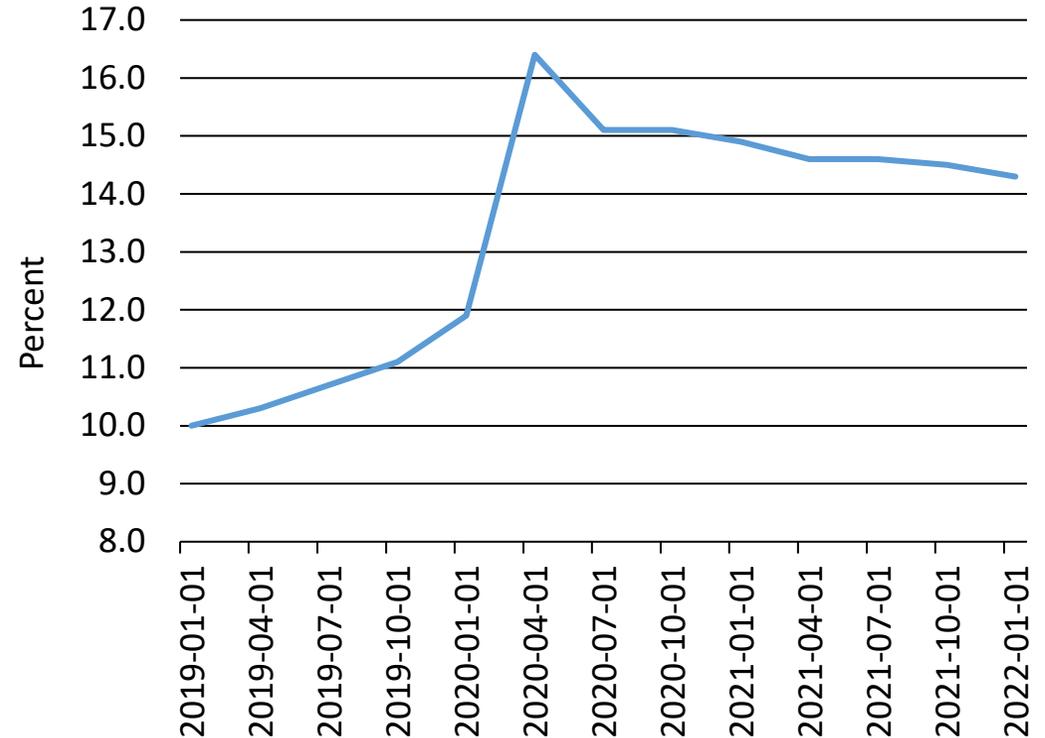
Transportation and Warehousing

Explosive Growth in Transportation and Warehousing in San Joaquin County:

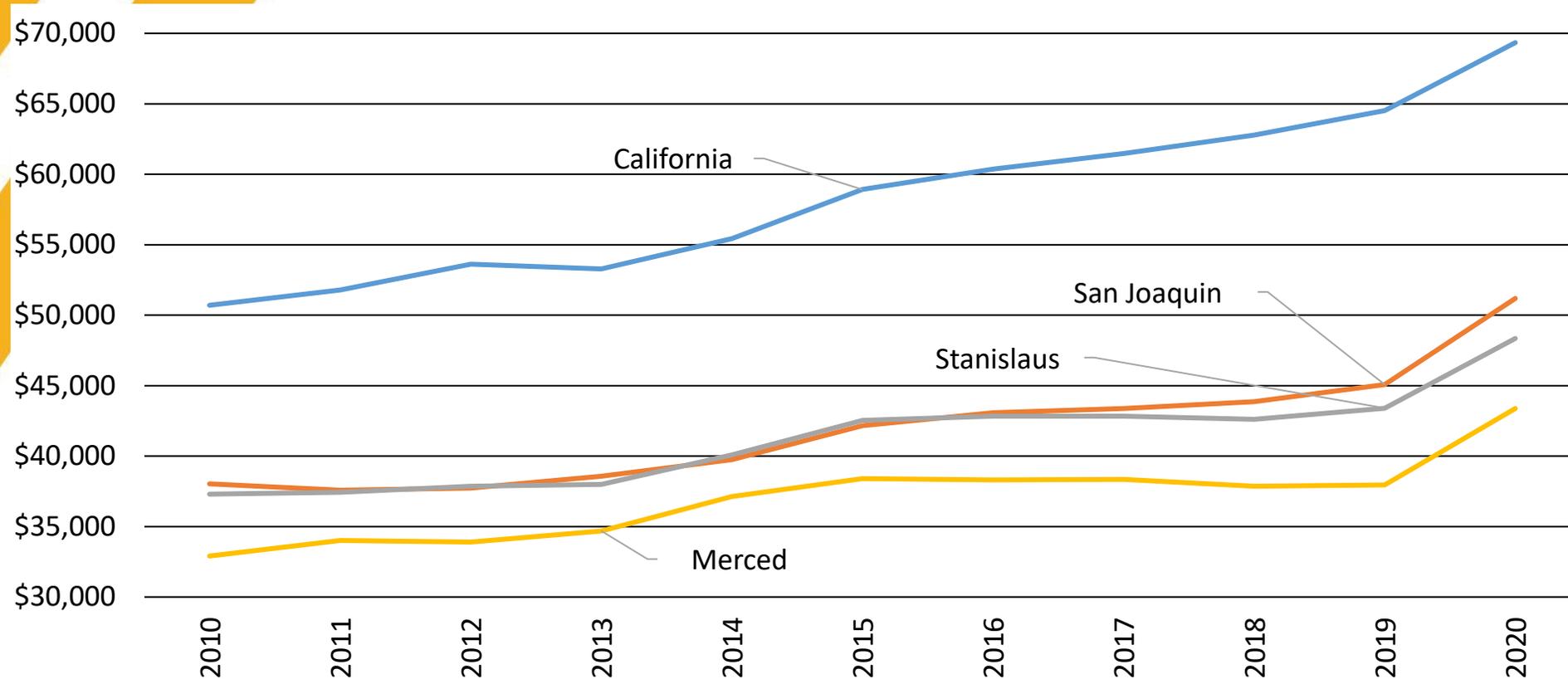
- **Over 40,000 jobs since 2011**
- **7,000 new jobs in 2020 alone!**

	2001	2011	2020
NSJV	22,996	30,755	71,919
Merced	2,684	3,742	6,185
Stanislaus	6,032	9,026	15,487
San Joaquin	14,280	17,987	50,247

But E-commerce sales are reverting back to trend growth.



Per Capita Income: Enormous Growth in 2020



Per capita income grew 9% in CA, and 15% in the NSJV in 2020.

CA: 80% of per capita income growth due to increase in government payments to individuals.

NSJV: Two-thirds of per capita income growth due to increase in govt transfers, one-third due to increased earnings (including big growth in "commuter" income)

The NSJV COVID-19 Impact Review

NSJV People & Society/As a Place and COVID-19



PART-TWO: NSJV PEOPLE & SOCIETY AND COVID-19

Demographics

Human Capital Formation

K-12 System Impacts

Adult Education System Impacts

Community College System Impacts

University System Impacts

Safety

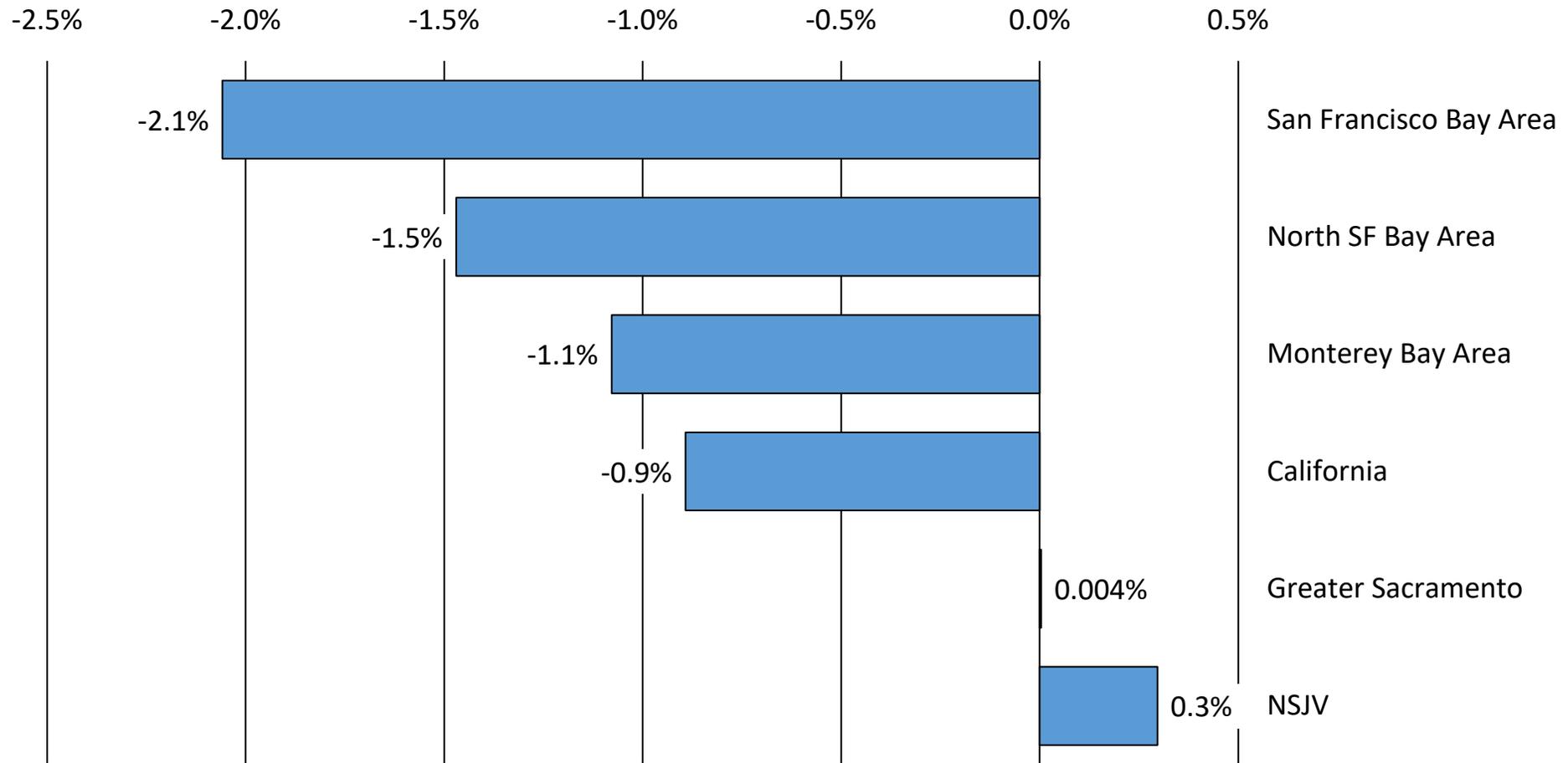
PART-THREE: NSJV AS A PLACE AND COVID-19

Impacts on Housing

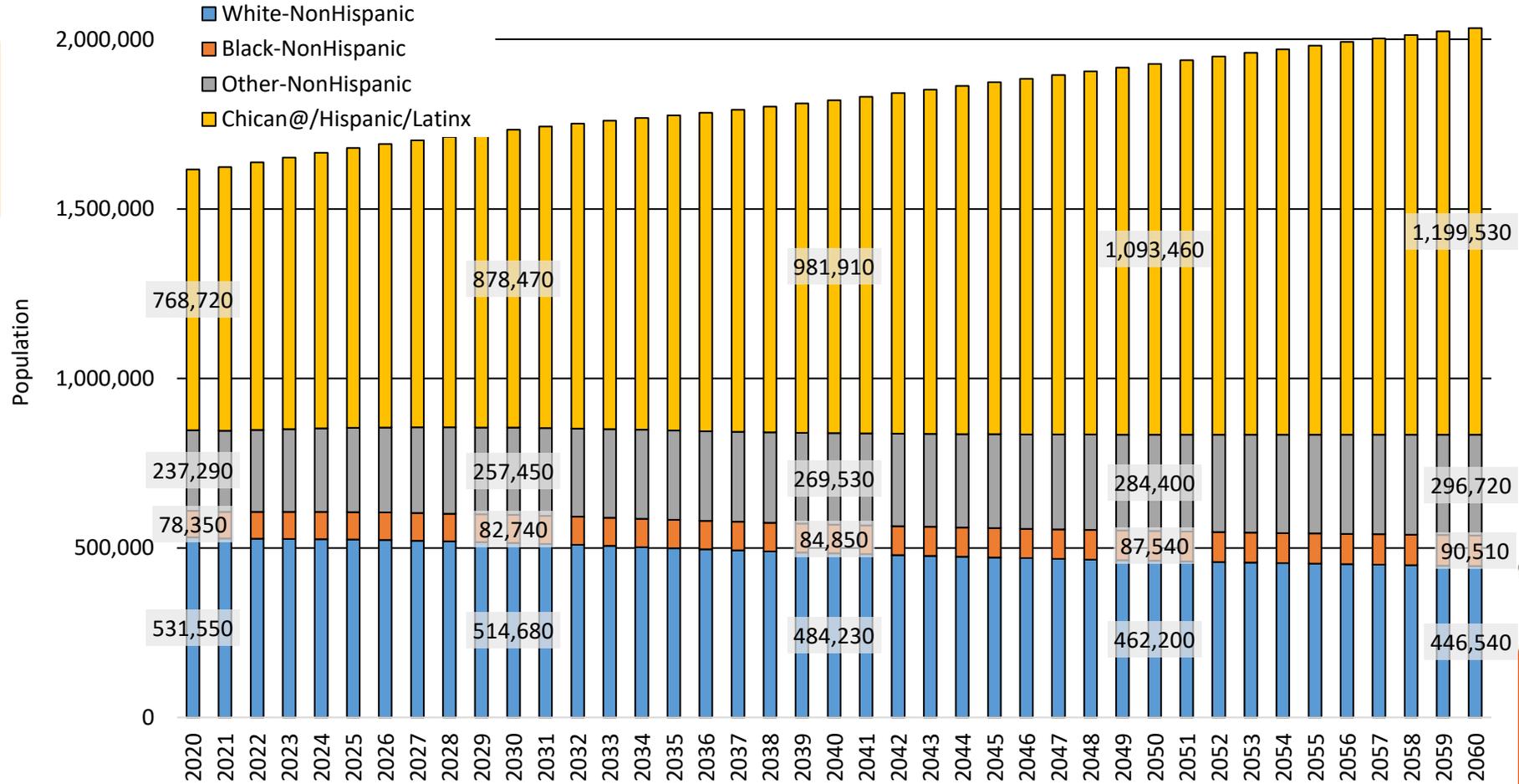
Impacts on Transportation

Impacts on Health

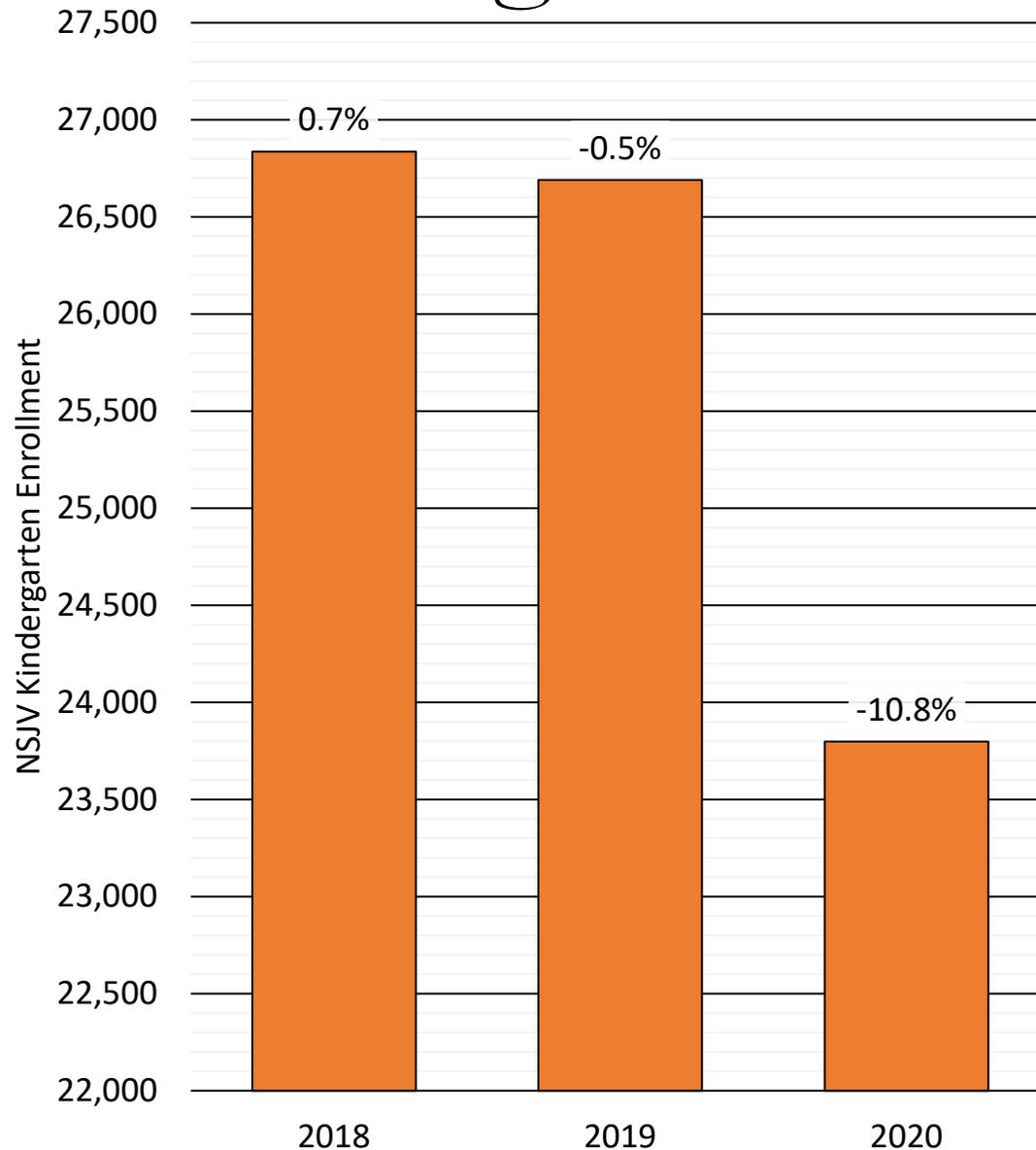
Population Change 4/1/2020 to 1/1/2022



NSJV Population Forecast 2020-2060

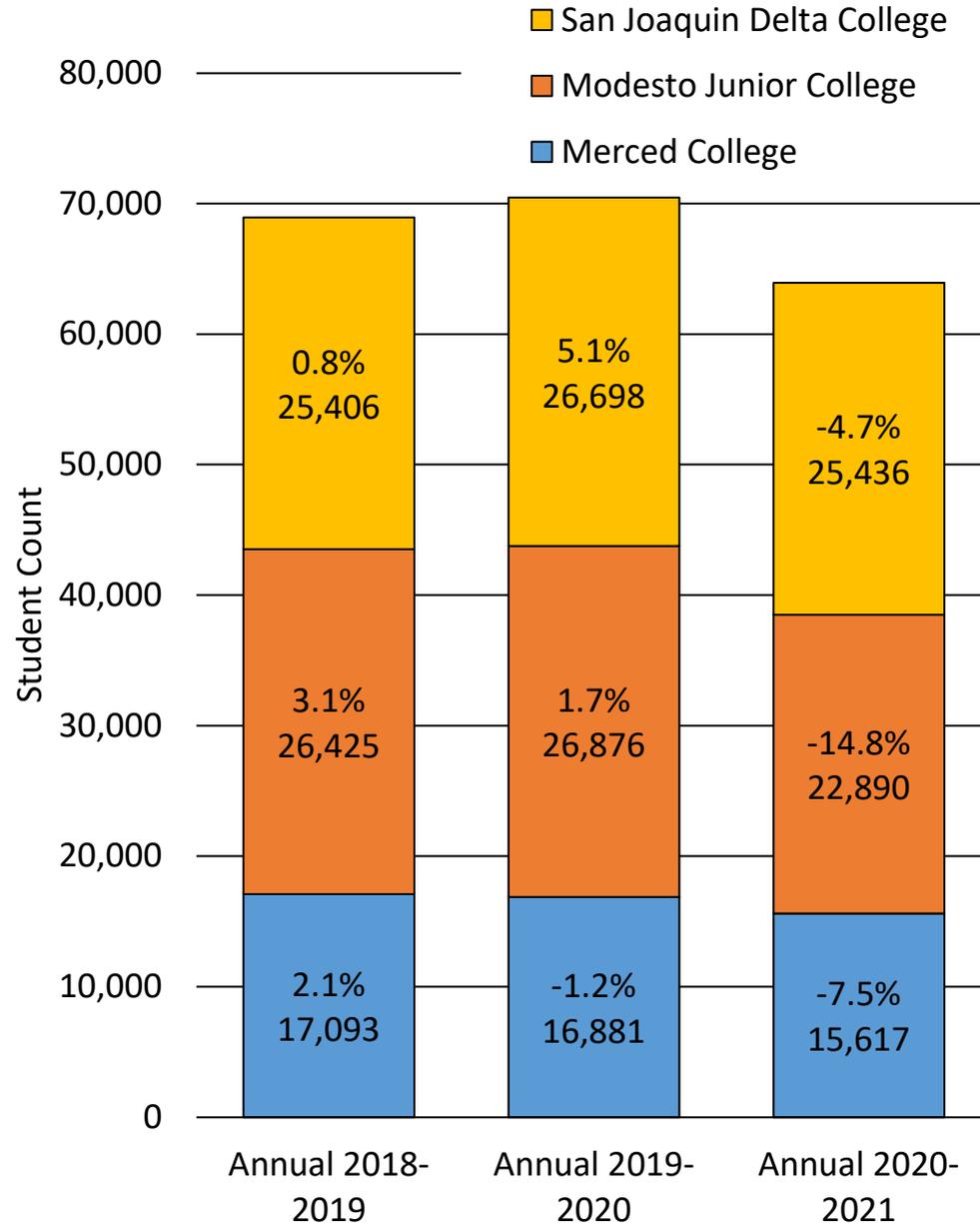


NSJV Kindergarten Enrollment



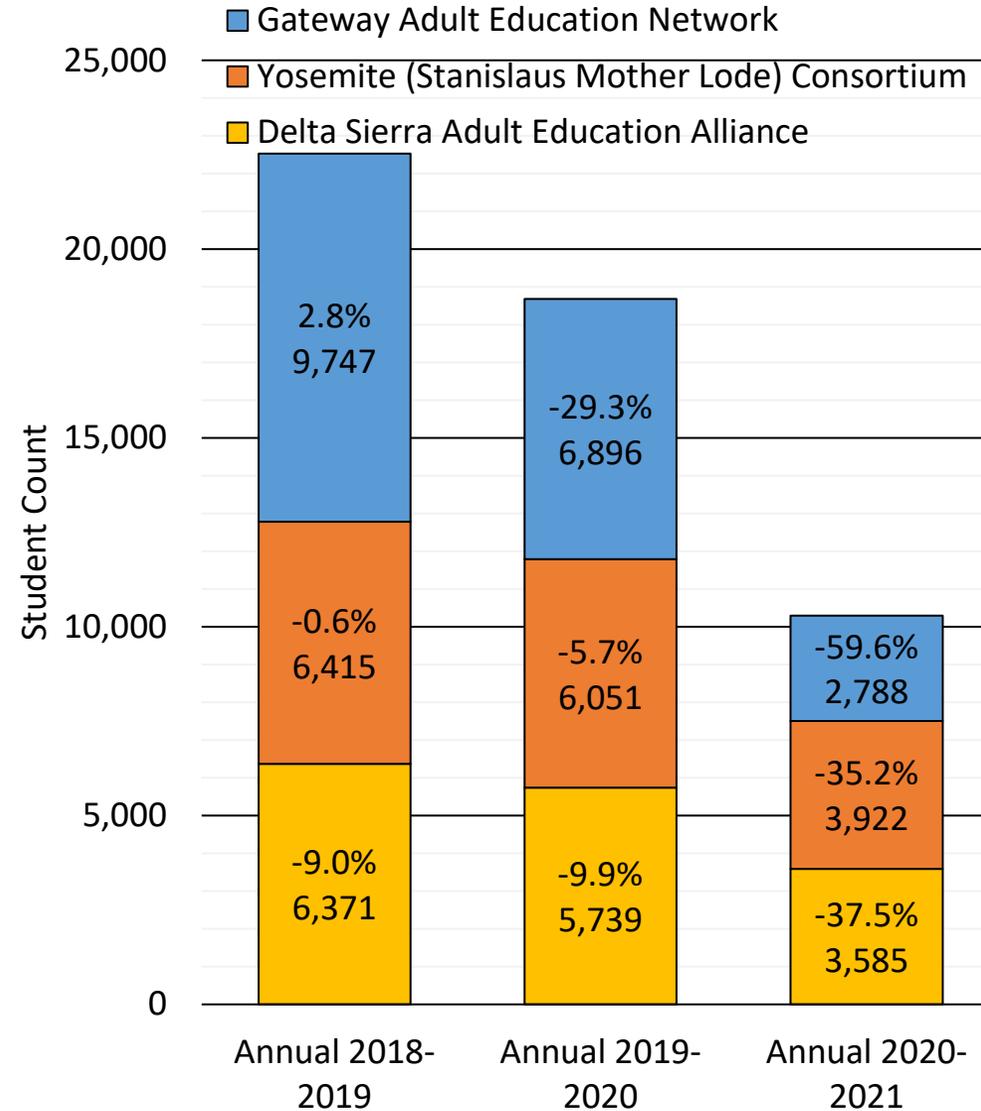
- NSJV Kindergarten enrollment dropped – 2,892
- G1-G6 students on average 5 months behind in math 2020-2021 school year (nationally) [Low-Income Schools 7 months vs High-Income Schools 4 months]
- G1-G6 students on average 4 months behind in reading 2020-2021 school year (nationally) [Low-Income Schools 6 months vs High-Income Schools 3 months]
- Drop-out rate worsened by 1.7% 2019-2020

NSJV Community College Enrollment



- NSJV community college enrollment dropped – 6,512 between 2019-2020 and 2020-2021
- NSJV sharpest annual decline in enrollment since the dataset began in 1992
- Men more likely to leave community college during pandemic now just 36.4% of student body [statewide 42%]
- CSUs decline not until Fall 2021
- UCs slight increases Fall 2020 & Fall 2021

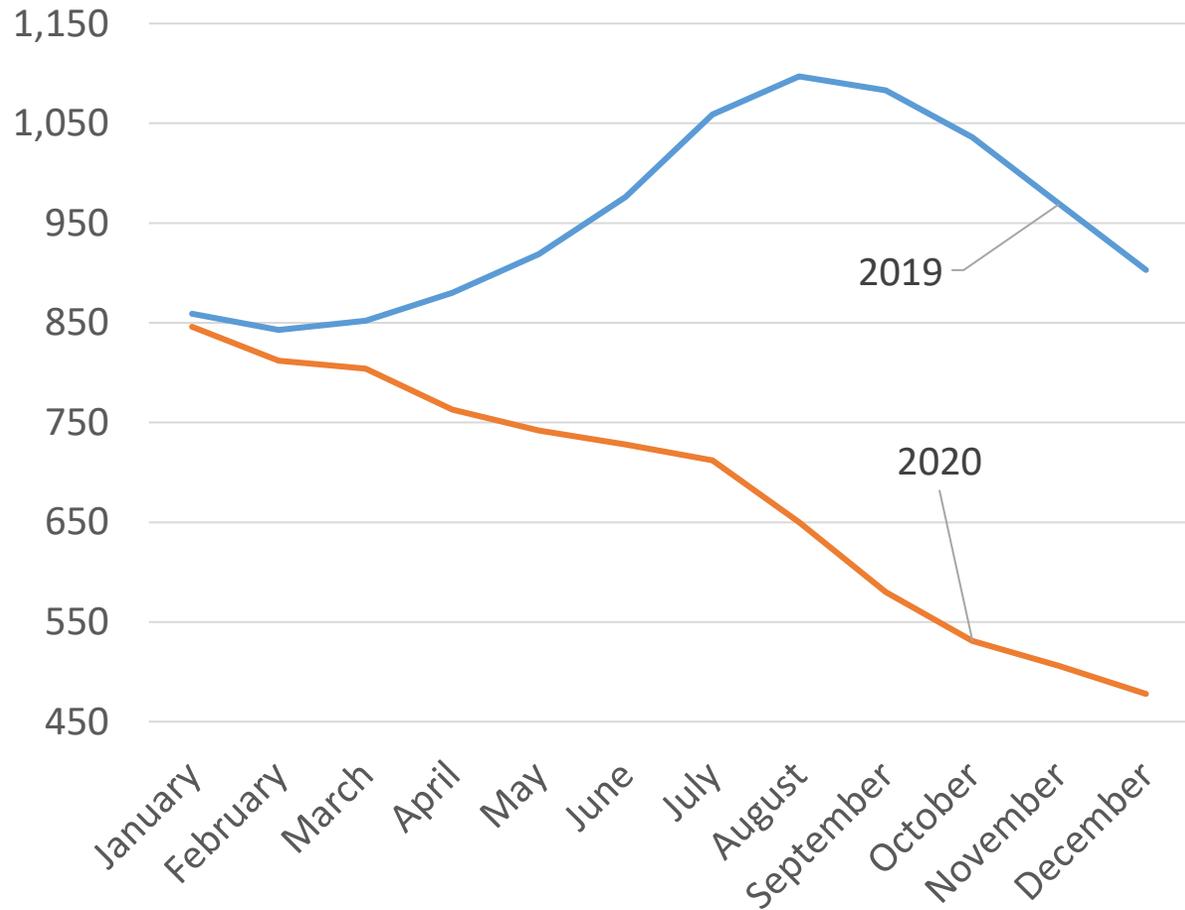
NSJV Adult Education Enrollment



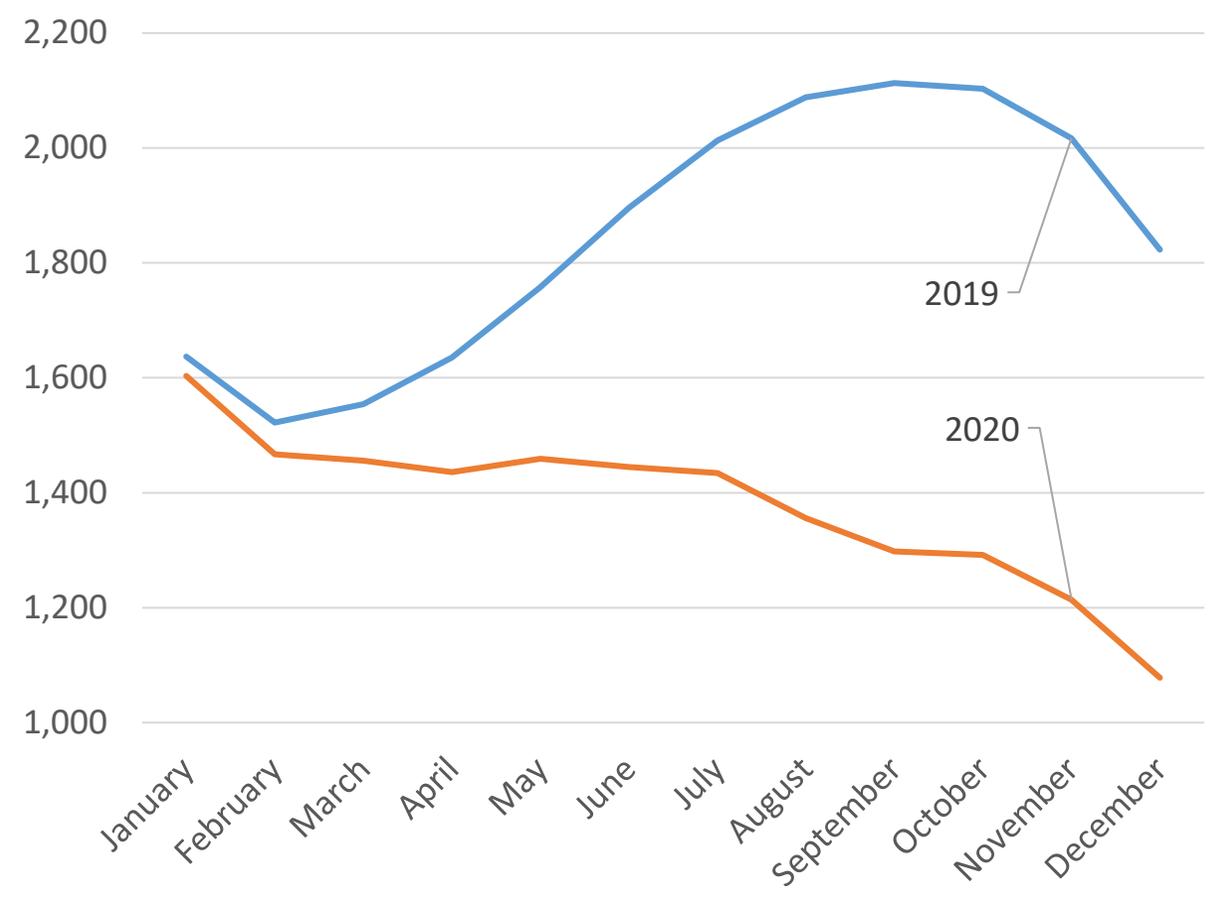
- NSJV adult education enrollment dropped – 8,391 between 2019-2020 and 2020-2021 (44.9%)
- Appeal of non-degree credentials 75% growth in 2021 nationally.
- Declines particularly acute among skill trades courses

Housing Inventory – Unique Listings per Month

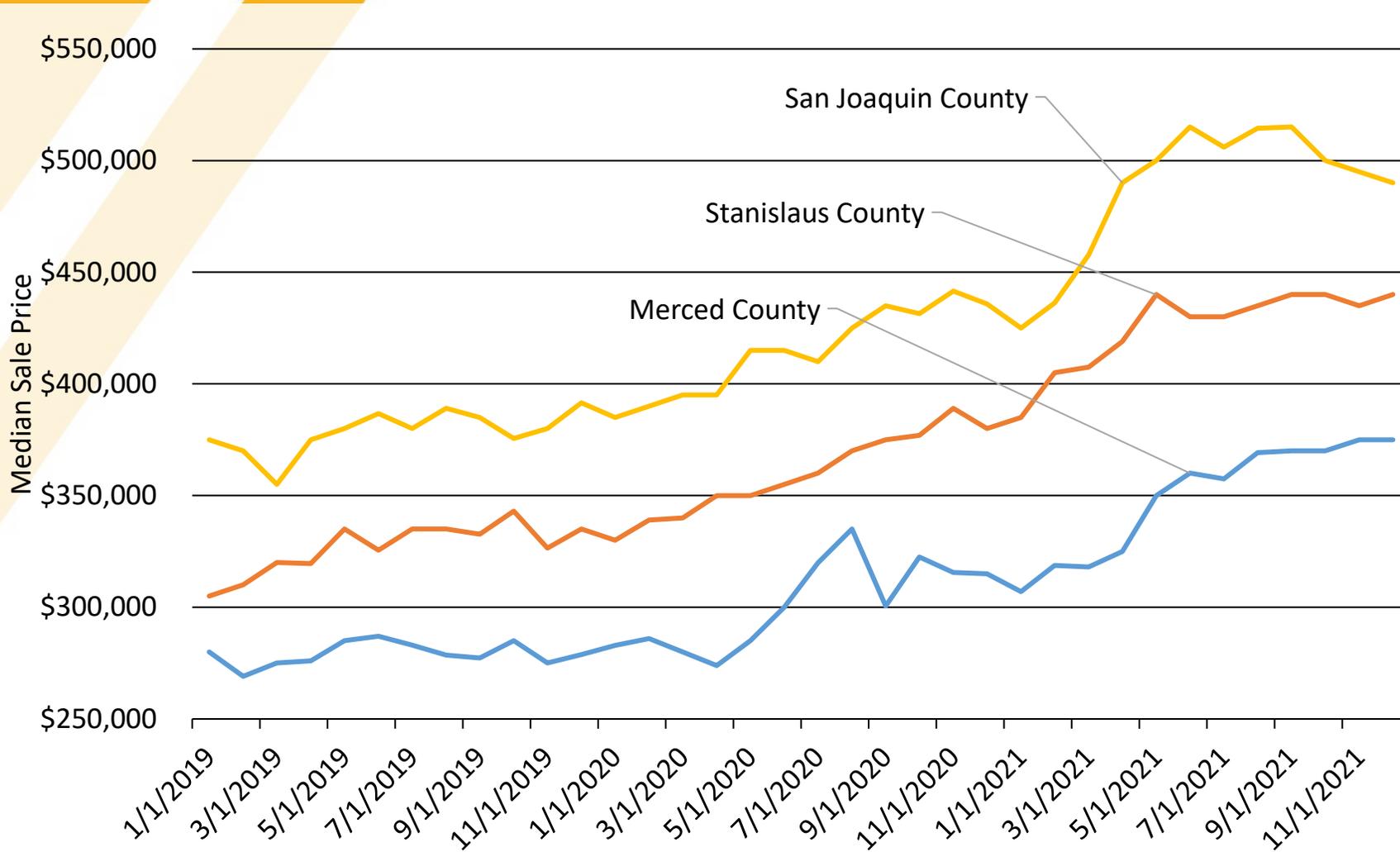
Merced County – SFR For-Sale Inventory



San Joaquin County – SFR For-Sale Inventory



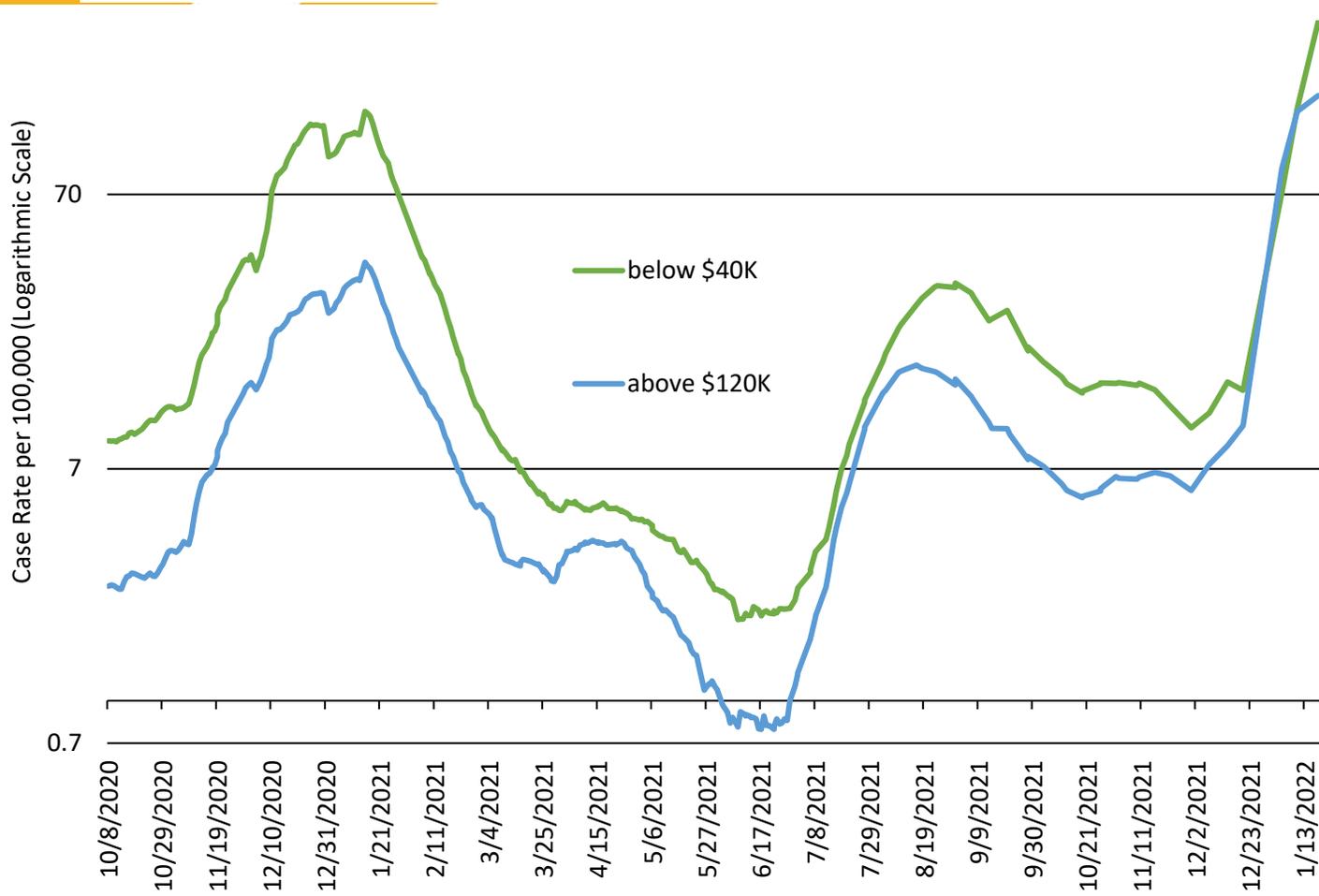
Median Price Single-Family Home



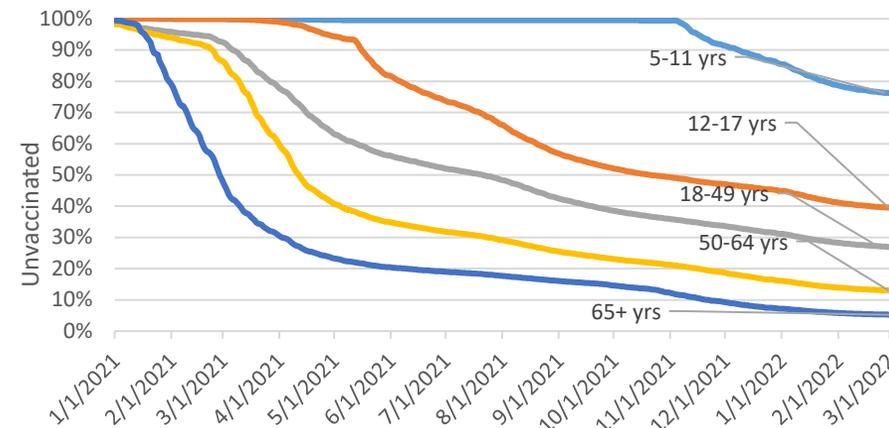
- Merced County rose 37% April 2020 to December 2021
- Stanislaus County rose 26% April 2020 to December 2021
- San Joaquin County rose 24% April 2020 to December 2021

NSJV Health

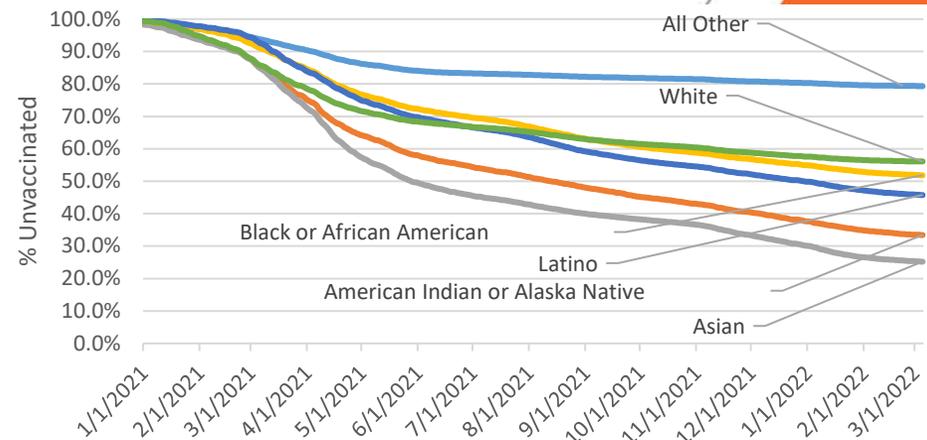
Statewide Community Case Rate by Median Annual Income



Vaccination by Age in the NSJV



Vaccination by Race/Ethnicity in the NSJV



Thank you.

Download the Report:



June 2, 2022

COMMUNITY ECONOMIC RESILIENCE FUND



NORTHERN SAN JOAQUIN VALLEY



WHAT WE'LL DISCUSS TODAY

- CERF Overview
 - General guidelines
- Application Process
 - Timeline
 - Grant elements
- Regional Collaborative Governance
 - Application roles
 - Work groups
- Next Steps

WHAT IS CERF

CERF is a one-time use of American Rescue Plan Act (ARPA) funds that will distribute \$600 million, in a competitive process, to regions across California.

The program will fund planning and implementation efforts to help communities economically recover from the COVID-19 pandemic and advance the transition to a carbon neutral economy with a diverse and equitable approach.



WHAT ARE THE PARAMETERS OF THE CERF?

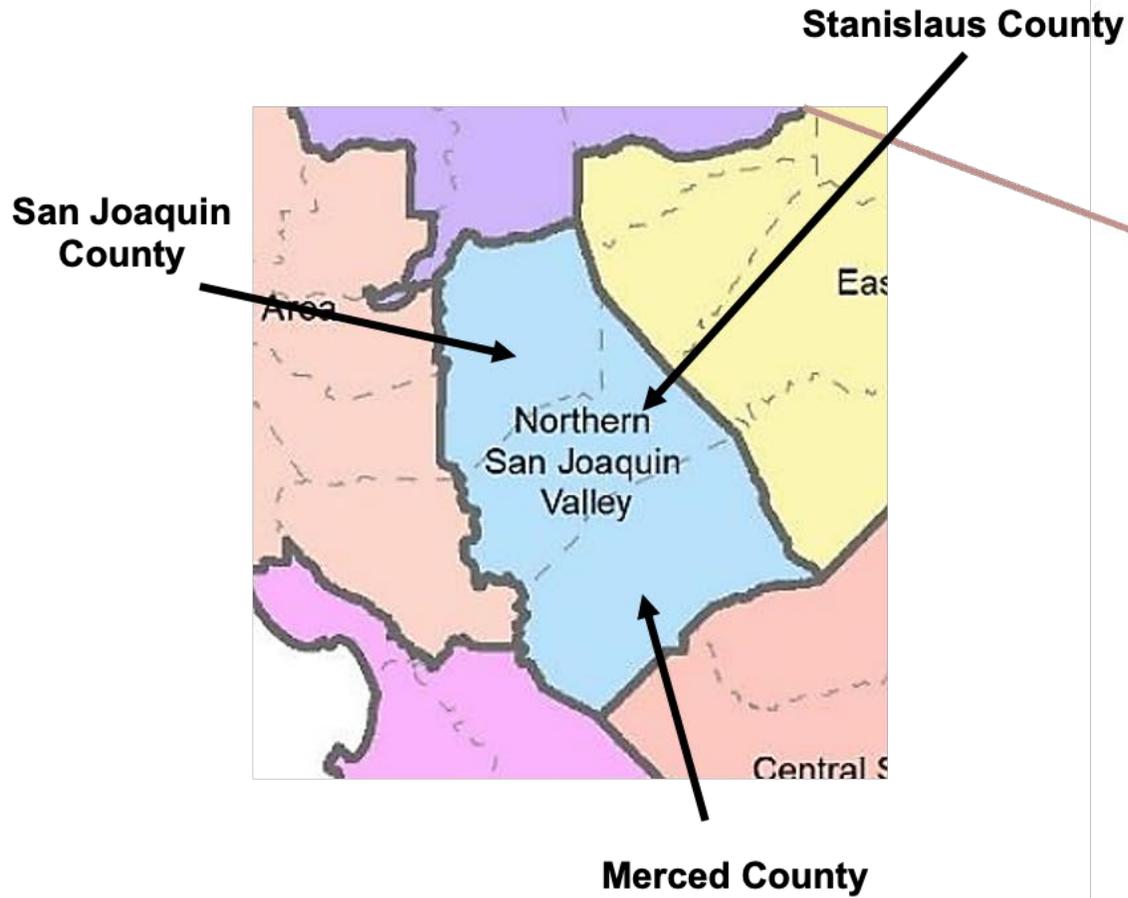
Supports efforts to plan and implement inclusive and low carbon economic growth strategies;

Focuses on “High Road Transition Strategies ” — the creation of high-quality jobs and inclusive pathways into those jobs, as well as strategies that will support the transition to a carbon-neutral future;

Seeks planning and implementation processes that focus on those who have often been left out of traditional economic development strategies.



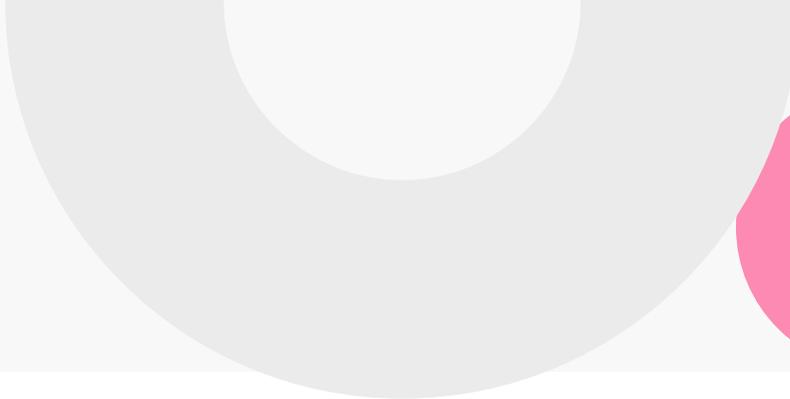
OUR CERF REGION



Final CERF Regions:



PHASE 1 TIMELINE



Event	Date
CERF SFP release	May 26, 2022
Last date to submit inquiries for the webinar	June 8, 2022 by 5:00 pm PT
Deadline to preregister for the informational webinar	June 13, 2022
Informational webinar	June 15, 2022 at 10:00 am PT
Deadline for Notice of Intent to Apply	June 22, 2022 by 5:00 pm PT
CERF Application Packages due	July 25, 2022 by 3:00 p.m. PT
CERF Application Package review and evaluation	July 26 – August 09, 2022
Award announcements	September 2022
Deadline to appeal (optional)	August 09, 2022
Estimated planning project start date	October 01, 2022

GRANT ELEMENTS



- Stakeholder Mapping
- Regional Summary
- Labor Market Analysis
- Industry Cluster Analysis
- SWOT Analysis
- Strategies for Increasing Health and Environmental Equity
- Strategies for Aligning With State Strategies

CERF Planning Roles



- Grant Working Group
- Fiscal Agent
- Regional Convener

WHAT'S NEXT

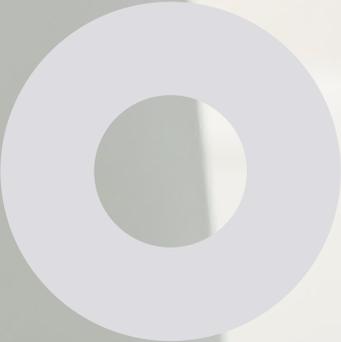


- Sign up for a working group
 - sjpartnership@sanjoaquinusa.org
- Provide contact information for others who should be involved
 - sjpartnership@sanjoaquinusa.org



THANK YOU

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