

DIRECTOR'S MESSAGE

I was hired as NOVAworks' director in 2021 and stepped into the role exactly one year ago. After twelve months at NOVAworks, I have four very distinct impressions of NOVAworks and our regional workforce environment.

Customer Service

The NOVAworks team continues to garner 90-plus percentile customer service ratings and five-star Yelp reviews on a regular basis. This is not something that anyone on staff takes for granted. These high marks are earned each day and with every customer interaction—be they with career seeker or employer. It is unique in the public workforce system to find this kind of hunger and dedication to the customer, and I'm proud to say that it works!

Our Future Workforce

We must do more. While the services and experiences we provide to young adults are stellar, far too few 16- to 24-year-olds in the NOVAworks region benefit. In the coming months, we will take a deep look at how our Workforce Innovation and Opportunity Act dollars can best be invested in the future workforce and in preparing young people for the future of work and for a lifetime of self-sufficiency.

Diversity, Access, Equity, Inclusion and Belonging

NOVAworks has taken the opportunity this past year, though opportunities granted by San Mateo County, Santa Clara County, and

the Tides Foundation, to expand our reach beyond our physical location in Sunnyvale and our providers in San Mateo and Menlo Park. We have seen a seismic shift in the need for adequate, reliable, and nimble remote services, coupled with physical sites that can be easily accessed throughout the region. Our presence now in seven libraries is an excellent start, and we will be partnering with many other organizations in the future to "meet people where they are" and to ensure that our services are inclusive and equitable.



Phrases to Retire

Many of you may have heard the phrase "best kept secret" in regard to NOVAworks' services or, indeed, the workforce development system across the country. While complimentary, this should never be the case. We simply should not be a secret and our outreach and marketing need to meet the moment. I look forward to sharing many ideas as to how to get the word out about NOVAworks in coming seasons.

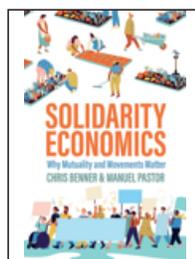
I appreciate the board that I inherited, and all of the new recruits that have been appointed this past year. Your voice and volunteer service are vital to the workforce and industry needs of the NOVAworks region—thank you! I look forward to many productive years to come.

—Marléna

STATE OF THE REGION

Our Economy, Mutuality & Movements

COVID-19 was a "disease that revealed our illness," stated Dr. Chris Benner of UC Santa Cruz Institute for Social Transformation and co-author of [Solidarity Economics, Why Mutuality and Movements Matter](#). The pandemic shone a harsh light on systemic inequality in this region and our nation. According to Dr. Benner, 46% of Americans can't access \$400 in an emergency; by age 60, 80% of Americans will have experienced at least one full year of poverty or joblessness; 28 million people are without health insurance and 44 million have inadequate insurance. There are also sharp racial disparities in emerging data on COVID-19.



The pandemic revealed both our shared humanity and huge income and social disparities. Returning to the pre-COVID status quo will be insufficient to address these problems. Our nation and region must reimagine and restructure with a focus on equity and inclusion, say Dr. Benner and co-author Dr. Manuel Pastor in their theory of "solidarity economics." They recommend an economy that's organized on collaboration rather than individualism; mutuality, a mutual commitment to recognizing our

sense of social and economic connection across differences and investing in transforming the economy; and a movement or shift in power relationships and expanding circles of belonging. Research has shown that this approach has resulted in sustained prosperity. Examples of this vision include teamwork to produce products and services, collective technological innovation, social entrepreneurship, employee-owned companies, valuing skilled labor, and a baseline social wage.

Workforce development can play a role in this transformation through ensuring greater inclusion of marginalized voices and encouraging ongoing engagement in the policies, programs, and approaches that shape our work.

2022 Silicon Valley Poll

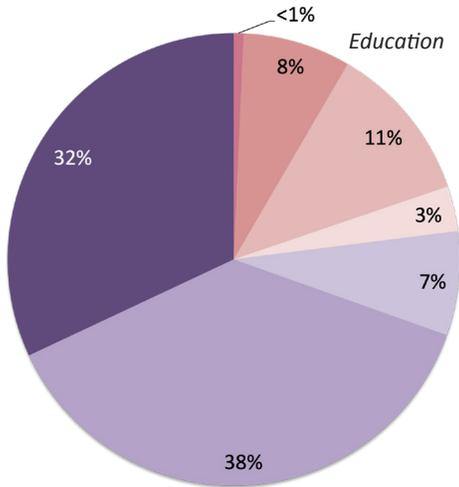
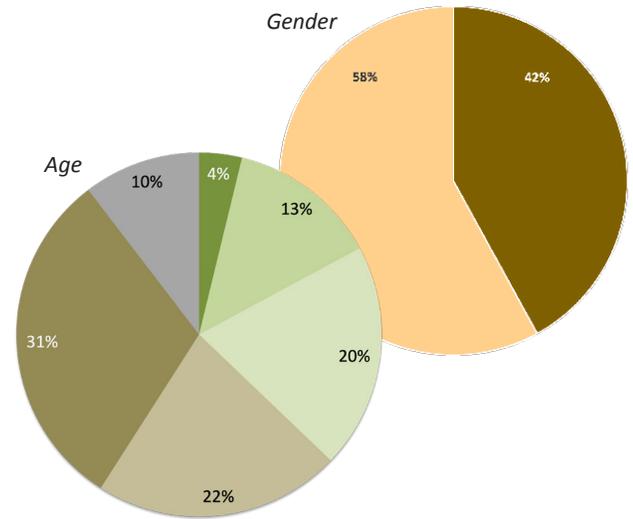
Joint Venture Silicon Valley recently released its annual [Silicon Valley Poll](#). The poll, a collaboration of Joint Venture and the Bay Area News Group, seeks to capture residents' feelings about the state of the region. The results of this year's poll painted a dark picture of the community we call home.

(continued on back page)

NOVAworks CUSTOMERS

Customer Demographics: Age & Gender (October 2022)

The median age of customers of NOVAworks' two job centers is 49 and nearly two-thirds of all customers are 45 or older. Historically, more women than men have accessed NOVAworks services and the current data confirm this trend.



Customer Demographics: Educational Attainment (October 2022)

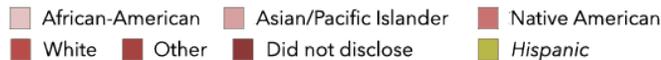
Customers of NOVAworks' two job centers tend to be highly educated with 70% possessing a bachelor degree or higher and nearly one-third a higher degree.



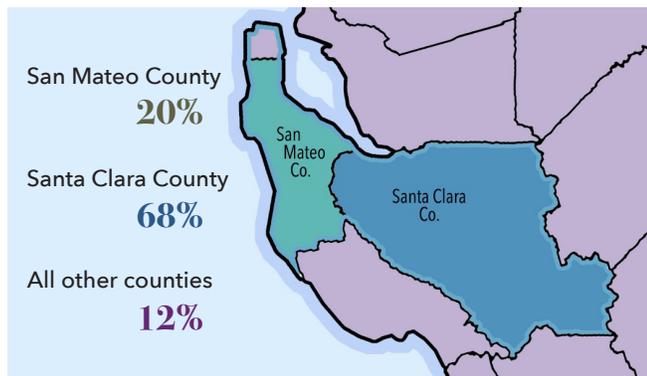
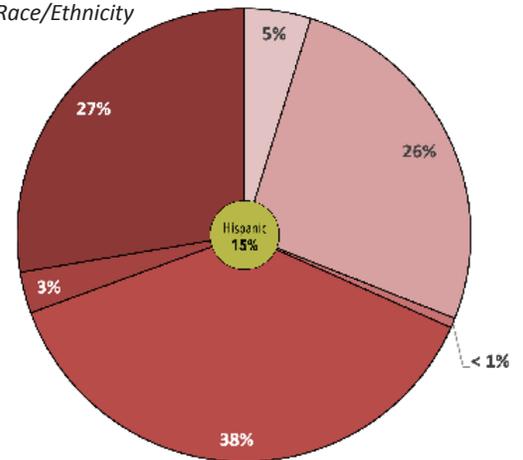
Customer Demographics: Race/Ethnicity (October 2022)

NOVAworks' customers are diverse with no race composing a majority, although more than a quarter chose not to disclose their race or ethnicity.

Hispanic ethnicity is independent of race and can apply in conjunction with any race.



Race/Ethnicity



Customer Commute: County of Residence (October 2022)

The vast majority of NOVAworks customers reside within Santa Clara County and interact with the Sunnyvale job center. One-fifth reside within San Mateo County, and the remaining 12 percent commute into the NOVAworks region from outside these two counties.

INDUSTRY SPOTLIGHT: BIOTECHNOLOGY

As we approach the third anniversary of the appearance of COVID-19 and see further declines in the effect and spread of the virus, this global event continues to shape the business world.

The pandemic catapulted biotech companies to the forefront of investment in 2020 and 2021, making it the hot new technology, according to a report by CNBC in September 2021. Companies involved in the development of COVID testing and vaccinations drove up the value of the iShares Biotechnology ETF, which tracks the biotech industry's largest companies, by 62%, compared to the S&P 500, which saw a 47% increase over the same two-year period.

Now that we're coming out the other side of the pandemic, the urgent need for COVID-19 solutions from biotech has decreased, and with investments into the sector softening, companies are feeling pressure to conserve and downsize.

Bloomberg Intelligence reported in February of this year that investment in biotech, which had peaked at \$5 billion a month in early 2020, had fallen by 84% to \$800 million a month at the beginning of 2022.

The San Francisco Bay Area is one of the world's leading biotech hubs, second only to Boston in scale. As of July, the Bay Area had approximately 38 million square feet of lab space with another 3.2 million square feet under construction, of which 38% had been pre-leased. While northern San Mateo County is recognized as the regional epicenter, biotech companies can be found throughout the nine-county region.

The region has not been immune to the downturn in financial investments. Since July 2022, NOVAworks has received Worker Adjustment & Retraining Notifications (WARN) from 11 biotech companies, indicating planned layoffs within the NOVAworks workforce region. Although the biotech industry employs 3.3% of workers within the region, these WARNs represented more than 15% of all workers affected by layoff events this fiscal year to date.

Of the 828 positions affected by these 11 layoffs, 287 (35%) are from Cepheid in Sunnyvale, which is currently ranked as the 15th largest employer within the sector regionally. The remaining 541 positions are from a variety of

employers scattered throughout San Mateo County.

Individuals affected by layoffs typically delay approaching the workforce development system for assistance until unemployment insurance benefits are near depleted. In the case of many of these biotech layoffs, the addition of generous severance packages and the availability of contracted outplacement services may delay their approach even further.



So although NOVAworks staff have yet to see an influx of biotech workers, we are conducting outreach, sharing resources, and actively preparing to work with these individuals when they do find their way to us.

CUSTOMER SUCCESS

“I want to extend my deepest thanks to everyone at NOVAworks for helping me to know that there are people and resources available out there to help me learn along my new journey of job-searching, interviewing, skill-building, networking, and just connecting with folks in the same boat as myself. More importantly, with these services made available to the public, we have tools to help us learn and grow in the workforce.”

“To know that I have an available network of willing and able staff to assist me is a great support and encouragement.”

Like so many millions of people, my life was severely affected in several ways by the COVID-19 pandemic. The most recent life-altering event came earlier this year, when I experienced not only the loss of my long-standing job with full benefits, but the loss of my housing, all at once. After being in my job for over 18 years, the thought of having to

job-search and interview, as well as maintain a roof over my head and keep a positive attitude, had its challenges and roadblocks on some days. However, after listening to a brief Zoom presentation from a NOVAworks staff person, I was surprised and encouraged to learn that I was a candidate for much-needed services that would help me along on my new journey.

From my first initial contact at NOVAworks, the staff was very friendly, supportive, and enthusiastic about the services they had to offer. To know that I have an available network of willing and able staff to assist me is a great support and encouragement. Having some reinforcements in my corner makes a huge difference when you have to take a leap into the new world of job-searching and skill-building to catch up in today's work world

The skill-building classes, weekly workshops, one-on-one advisor services, and — to my surprise — with provisions of food and gas while staying afloat seeking a job, have all been much-needed resources for me. I started the Career Exploration Guide, and on my second day of exploration, I discovered what not to pursue further, and found mini job fairs and job openings for my field of interest. While I am in the process of learning, sharpening skills, and on the job fair/interview path, I am confident that with the assistance of NOVAworks, I will land in a work environment suited for me.

I am thankful these great resources have been made available, particularly in such trying times, and I hope NOVAworks will be a continued resource for communities to benefit from in their new path of job-seeking and learning new things along the way.”

*Sincerely,
Volanda Padilla*

NOVAworks customer (2022)

(State of the Region, continued from front page)

- 64% of respondents say the region is moving in the wrong direction.
- 56% are considering moving away in the next few years.
- Just one-third provided the local economy with a positive rating.
- Nine out of ten respondents ranked high housing costs and homelessness as an “extremely serious” or “very serious” problem, with 82% of Black or African American and Latinx respondents rating it “extremely serious.”
- 40% of men and 31% of women view the Silicon Valley economy favorably, a likely consequence of a gender-based income gap.
- 62% of Republicans and 23% of Democrats say the quality of life here has grown “much worse.”
- Eight out of ten respondents see racism as a significant problem, with the severity of the problem increasing by the race/ethnicity of respondents.
- 48% are currently participating in remote work, with 75% of remote workers predicting this trend will continue.



- Two-thirds of respondents express a sense of belonging with a “very strong” sense of belonging expressed by diverse residents.

The concerns expressed in this poll have serious implications for employers, workers, and our community, but Drs. Benner and Pastor have proposed a hopeful roadmap to address the challenges.

FAST FACT

More than half of respondents (56%) say they are likely to move out of the Bay Area in the next few years. This figure reflects more than half (59%) of working-age adults (18-64)...



Source: Joint Venture Silicon Valley Poll (2022)

INDUSTRY DATA

Top 10 Industries by Employment

Industry	Count	Median Salary
Computer Systems Design	81,477	\$ 134,106
Restaurants	50,025	\$ 42,225
Scientific Research & Development	49,363	\$ 144,629
Software Publishers	42,234	\$ 145,479
Web Search Portals	42,006	\$ 148,693
Computer & Peripherals Equipment Mfg.	36,741	\$ 149,127
Biotechnology	34,212	\$ 125,300
Media Streaming Distribution Services	33,272	\$ 120,845
Elementary & Secondary Schools	27,273	\$ 80,074
General Medical & Surgical Hospitals	26,992	\$ 115,389

Top 10 Occupations within Biotechnology Industry

Occupation	Count	Median Salary
Biological Scientists	2,044	\$ 118,800
Software & Web Developers	1,596	\$ 155,100
Packaging & Filling Machine Operators	1,575	\$ 49,000
Medical Scientists	1,322	\$ 141,100
Chemists & Materials Scientists	1,029	\$ 102,400
Natural Sciences Managers	955	\$ 221,900
Chemical Processing Machine Operators	906	\$ 66,400
Biological Technicians	851	\$ 65,900
Inspectors, Testers & Sorters	816	\$ 61,100
General & Operations Managers	785	\$ 212,300

Source: JobsEQ (2022)

ABOUT NOVAWORKS

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NOVA is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.