

HOOSIER TALENT SNAPSHOT 2023

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Barriers, challenges, and opportunities around Indiana's workforce shortage

Key Findings

- Indiana is currently experiencing unemployment at or even below pre-2020 levels – hovering somewhere around the 2000 unemployment rate.
- Industries projected to provide “good and promising jobs” in Indiana are Manufacturing, Transportation and Warehousing, Accommodation and Food Services, Administrative and Support, and Finance and Insurance.
- While recent polls may overstate the finding, it is true that affordable and accessible childcare is a large barrier to employment in Indiana.
- For long-term effects, there must be an equal focus on reducing the impacts of structural barriers and on removing the structural barriers themselves.
- Several important factors of successful workforce development programs for “good and promising jobs,” include
 - Investing in education and training that aligns with both employers’ and employees’ goals;
 - Reducing or relaxing strict educational requirements;
 - Being more cognizant of local and geographic factors;
 - Scaling up evidence-based strategies;
 - Restoring access to funding like Pell Grants for the formerly incarcerated;
 - Investing in infrastructure and career pathways; and
 - Focusing investments and research on marginalized populations.
- The goal should not be for any one industry to be an overflow for anyone who struggles with employment, but rather for all workers to have choices between promising, well-paid jobs and career paths, including trade and vocational professions.

Summary of Recommendations

Based on the findings of this report, below is a list of recommendations aimed towards providing every Hoosier with the same access to job information, preparation, and opportunities:

- Partner with local communities, the federal government, employers, and employees to better design and be more specific in their goals for employment programs.
- Provide special funding for rural programs to study their efficacy.
- Increase investment in targeted data collection and evaluation.
- Encourage programs to be more flexible in their requirements and processes to meet the needs of varied individuals.
- Encourage collaboration between programs with different interest groups, rather than shuffling individuals between them.
- Focus on strategies for targeted populations that show evidence-based long-term results on employment.
- Increase investment in marginalized population workforce development.

Labor Force Participation

COVID-19 Recovery

Indiana's unemployment rate between 2013 and 2020 had been steadily declining but, understandably, saw a peak during the COVID-19 pandemic. However, the state is currently experiencing unemployment at or even below pre-2020 levels – hovering somewhere around the 2000 unemployment rate.¹ The May 2023 Indiana Employment Report from the Indiana Department of Workforce Development states that, out of Indiana's 6.8 million population, there are 126,190 people who are “potential workers,” or those who are unemployed, want a job, and are out of the labor force.² The Hoosier unemployment rate in May 2023 was 3.1%, which is slightly up from the April 2023 3.0%, but still lower than the May national unemployment rate of 3.7%.³

In the 12 months between May 2021 and April 2022, Indiana experienced the second largest increase in its technological workforce in the nation – 8.4% and second only to Maryland – reflecting partially a changing job market but also the disproportionate benefit that Indiana received from the migration of tech workers to lower-cost states during the COVID-19 pandemic.⁴ Though the growth of tech jobs has been large, the fastest-growing occupational sector, both nationally and for Hoosiers, is transportation and warehousing.⁵ Over the last decade (2011-2021), Hoosiers have seen a 36.8% increase in employment in this sector, or roughly 46,116 jobs, bringing the state's total to 171,310 jobs, or roughly 6% of employment in Indiana.⁶ Just below Indiana's figures, the nation saw an increase of 37.6%, or 1.9 million jobs, in the same period, and the warehousing and transportation sector makes up 5% of national employment or roughly 6.9 million jobs.⁷

The warehousing and transportation employment sector is split into subsectors, 9 of which have data available for Indiana specifically. Nationally, the warehousing and storage subsector makes up 25% of warehousing and transportation sector employment, magnified in Indiana, where $\frac{1}{3}$ of Hoosiers are employed in warehousing and storage. Just under $\frac{1}{3}$ – 31% – of warehousing and transportation sector employment in Indiana is devoted to truck transportation.⁸ With the increase in employment in this industry, warehousing and storage saw an increase of 35,779 workers (+165%) from 2011 to the present day. Couriers and messengers gained 9,693 (+65%) workers, and trucking transportation came in at an increase of 2,052 (+4%) workers in the same period.⁹

While transportation and warehousing was far and away the fastest-growing sector, manufacturing had the highest increase in Hoosier jobs numerically.¹⁰ Manufacturing is big business in Indiana; between 2010 and 2022, Indiana's manufacturing employment has grown 20.7%, compared to 13% nationally, and its share of state GDP is the highest nationally as of 2022, at 25.7%.¹¹

However, Indiana’s manufacturing real labor productivity is increasing at less than ½ the pace of the nation’s, or 3.1% total – indicating a large, but not necessarily innovative, sector.¹² Further, manufacturing wages in Indiana in May 2023 came in at 7.3% less than the national average.¹³

Notable Trends

While Indiana began 2023 with a hot job market, there is some concern that workers may be left high and dry as the year progresses. Part of this concern stems from the Federal Reserve’s increase of loan interest rates; in an effort to lower inflation, the Fed is simultaneously stimulating producers to decrease production, therefore requiring less labor costs.¹⁴ Prices may decrease, but employment may as well. Because of the slowdown in production, manufacturing is predicted to be one of the hardest-hit industries – a problem for a state like Indiana, whose job market relies heavily on the manufacturing sector.¹⁵ Though talent has been entering the state, still “[n]early three-quarters of Indiana’s tech workers are employed outside the tech sector.”¹⁶ This reflects a national trend in the difficulty of assessing and accessing tech talent. A 2021 survey indicated that tech executives cite “the talent shortage as the most significant adoption barrier to 64 percent of emerging technologies compared with just 4 percent in 2020.”¹⁷

A commonly touted issue in the national labor market is the “labor shortage” that businesses seem to be experiencing. However, the reality is more complex. While laborforce challenges exist, the “people don’t want to work” narrative ignores the genuine changes that “[e]ducational disruptions, child care needs, worker empowerment, and remote work” have brought to the labor sector.¹⁸ As another long-term effect of the pandemic in combination with aging populations, national growth in elder care services has increased, but Indiana’s has not, though the nation does reflect Indiana’s pattern of increased employment in outpatient care and decreased employment in facility-based care.¹⁹

Labor force participation is impacted by a number of factors, including educational disruptions, lack of child care, and an aging population

Indemand Jobs, a project of the Indiana Department of Workforce Development, provides job seekers with up-to-date information on job demand in Indiana. The system uses both short-term projections (2018-2020) and long-term projections (2016-2026) to rank jobs from 1-10, which are then averaged within a sector to a 1-5 rating. Metrics for this ranking include “Total Openings (2 & 10 year projected openings including new and backfill positions), Growth Openings (growth openings by occupation), Percentage Change (from base year to projected year), Real-Time, Labor Market Information, (job posting data from online job boards collected by Burning Glass Technologies), and Wages (Bureau of Labor Statistics 2018 Wage Estimates).²⁰ As of writing this report, the jobs that top the charts are: Accountants and auditors, Coating, painting, and spraying machine setters, operators, and tenders, Electricians, Financial managers, First-line supervisors of mechanics, installers, and repairers, First-line supervision of production workers, General and operations managers, Industrial

engineers, Industrial machinery mechanics, Industrial production managers, Medical and health services, managers, Nurse practitioners, Sales representatives of services, except advertising, insurance, financial services, and travel, and Software developers.²¹

In context, a publication of the Indiana Business Research Center at Indiana University's Kelley School of Business, also calculates industry sector momentum, or the “numeric change in employment [multiplied by the] percent change in employment.”²² Over the previous decade, the three sectors with the highest employment momentum are Transportation and warehousing, Professional, scientific and technical services, and Manufacturing.²³

Burning Glass, a research institute that “work[s] with educators, employers, and policymakers to develop solutions that build mobility, opportunity, and equity through skills,”²⁴ defines good and promising jobs in Indiana as jobs that provide value to job seekers, value to employers, and value to community.²⁵ Value to job seekers includes metrics such as ability to earn a living wage, stability, long-term opportunities, etc. In contrast, value to employers includes attrition, the time it takes to fill a job or train a worker, and the value of skills and competencies. Community value is “based on the transferability of skills across occupations and industries, projected growth, and the multiplier effect these jobs have on the local economy.”²⁶

In Metro Indianapolis, some good and promising jobs that do not require a BA include Production Worker, Laborer / Warehouse Worker, Production Supervisor, Repair / Service Technician, Maintenance / Service Supervisor, Registered Nurse, Building and General Maintenance Technician, Manufacturing Machine Operator, Tractor-Trailer Truck Driver, Field Service Technician, and Quality Inspector / Technician. Metro Indianapolis's good and promising jobs that require a BA include Quality Control Systems Manager, Production Plant Manager, Software Developer, Operations Manager / Supervisor, and a wide array of Engineers (civil, software, information security, mechanical, validation, electrical, and engineering managers).²⁷ Good and promising industries include, unsurprisingly, Manufacturing, and Transportation and Warehousing, as well as Accommodation and Food Services, Administrative and Support, and Finance and Insurance.

Please see Appendix A for further occupational projections.

Employment Barriers

Among the many barriers to employment, the most relevant to the labor force participation trends, opportunities, and gaps presented in this brief are criminal conviction, childcare, and transportation. A study from the 2018 Quarterly Journal of Economics revealed that employer concerns about applicants with criminal records are a real barrier to employment; evidence indicated that “employers who asked about criminal records were 63% more likely to call applicants with no record compared to those with them, often due to concerns about recidivism and gaps in work experience.”²⁸ What these employers might not realize is that not only are they diminishing their labor pool of talented workers, but they are also missing out on the federal Work Opportunity Tax Credit, which provides companies with a tax credit just for hiring formerly-convicted employees.²⁹

Many employers are unwilling to hire ex-offenders despite tax incentives to do so

In 2020, Single parents spent between 27%-44% of median income on childcare for one child. Parents in poverty could end up paying more than half their income for childcare

In Indiana, a recent poll listed the Hoosier state as the 7th worst state to live and work in, primarily for childcare and inclusivity reasons.³⁰ While there are concerns about the validity of this poll’s results, it does ring true that childcare is a significant barrier to employment in Indiana. Nationally, evidence indicates that shorter school days and more expensive childcare options result in not only barriers to maternal employment but also “result in greater investments in childcare time.”³¹ ChildCare Aware of America and Early Learning Indiana cite that, as of 2020, single parents were spending a minimum of 27% and up to 44% of median income on childcare services for one child, inclusive of both child care centers and family child care.³² 2019 data from ChildCare Aware aligns with these figures and also emphasizes that single parents end up paying 52.5% of their income on center-based childcare for one child, and 91.8% of their income for two children.³³ Even married couples feel the price pressure; a married couple with two children at the poverty line could end up paying as much as 86.4% of their income on center-based child care and 52% on home child care.³⁴

Another Indiana-specific barrier to employment is transportation. A study from 2022 found that in Marion County alone, 30,000 workers were without vehicles, many of whom rely on public transit to get to and from work.³⁵ Those in poverty and without reliable transportation may also find themselves trapped in cyclical poverty; “If someone can’t afford a car, it’s difficult for them to get a stable job with benefits that provides the opportunity to accrue the wealth necessary to buy one. Even after that initial purchase, expenses continue with factors like gas, insurance and maintenance.”³⁶ Further, many up-and-coming jobs that pay well, have benefits and don’t require a collegiate degree are in the suburbs of Indianapolis, where public transportation becomes sparse. Several organizations focus specifically on Marion County, but the suburban and more rural counties face both barriers: little funding and advocacy for public transit and less public transit overall. Increasing access to reliable and affordable public transportation increases employment opportunities for those without vehicles, and “[e]quitable transportation systems can help address spatial mismatch and increase upward economic mobility.”³⁷

Existing Innovative Solutions

RecycleForce

Indianapolis runs a joint recycling and workforce development program called RecycleForce, that “[w]ith revenue generated from [their] recycling business, [...] helps formerly incarcerated individuals rebuild their lives through on-the-job and classroom training, social supports and job placement.”³⁸ The latest outcomes reports are from 2018, written by MDRC, known before 2023 as the Manpower Demonstration Research Corporation. As part of a study of 5 subsidized transitional employment programs nationally, MDRC ran in-depth interviews with RecycleForce participants and evaluated program effectiveness. RecycleForce itself recycles “e-waste,” so participants generally work full-time sorting and disassembling donated electronics, as well as loading and unloading trucks.³⁹ During the time of study, participants received \$9-\$10 an hour, though those with extra assignments could get overtime when they worked weekends. Though employment at RecycleForce is generally temporary before the participants move to other unsubsidized work, some are granted full, unsubsidized employment with the program⁴⁰, and over 50% of participants were given subsidized employment extensions. Finally, RecycleForce also offered occupational training, case management, job development, work-related financial support, and child support-related assistance.”⁴¹

Their model was noted as highly supportive, including the fact that supervisors were often graduates of the same program.⁴² Another distinct feature of the Indianapolis program was that it had the longest average duration of participation, over 70 days, which reflected programmatic design but also “the greater willingness of some programs to allow participants to stay in transitional jobs longer than planned if they had good attendance but were having difficulty finding unsubsidized jobs.”⁴³ However,

Evidence suggests that intensive transitional employment services benefit high-risk populations (like justice-involved individuals) the most

Indiana's costs were also the highest – at about \$11,000 compared to the lower end of the spectrum at \$7,000 per individual. However, because RecycleForce is a social enterprise that also brings in income, net expenses per person came to \$7,800, making the programmatic expenses seemingly equivalent to the other studied programs.⁴⁴

Notably, though costs came out to a similar figure, “[t]he Indianapolis program was the only one that reduced the broadest measure of recidivism during the 30-month follow-up period,” though of the programs studied it also targeted the highest-risk population.⁴⁵ Indiana limited program participation to those with a moderate or high score on the Indiana Risk Assessment. Compared to the control group recidivism rate of 74%, 67% of RecycleForce participants had a “criminal justice event” in the 30 months post-program graduation.⁴⁶ Evidence from this report and other research suggests that long-term, intensive transitional employment services seem to benefit high-risk populations the most. Other noted successes of the program include a high participation rate in offered services, high satisfaction with these services, increased child support payments in the first year, and “a positive and significant impact on the number of quarters employed during the last year of the follow-up period.”⁴⁷

One of the concerns noted in participant interviews was that full-time transitional employment limited participants in necessary personal and post-release activities, such as obtaining a driver's license or searching for unsubsidized work.⁴⁸ Further, transitional employment is temporary, and some of the participants had not been informed if they would be hired full-time by the end of their participation in the program and their final interviews with MDRC. Some participants began looking for other jobs, while others put off the job search in hopes of being hired full-time with RecycleForce.⁴⁹ For those that received unsubsidized employment offers, it did not guarantee long-term employment, and some participants felt “that employers were using the subsidy to cut their own labor costs, [...] were disappointed at being let go at the end of the subsidy, and did not believe the financial explanations provided for not hiring them permanently.”⁵⁰

Generation Work

Generation Work is a project of the Annie E. Casey Foundation, a private philanthropic organization that performs research and provides grants to “create more innovative, cost-effective responses to challenges facing children and young people.”⁵¹ The Foundation had organizations in 5 cities change how their workforce programs operated to see the effects of “better aligning education, training, and support services across organizations, and weaving into their systems best practices related to employers and youth, [...] and help them incorporate a racial equity lens into their work.”⁵² The Indianapolis partners chosen were Goodwill Industries of Central Indiana, EmployIndy, and the Region 12 Workforce Development Board. Goodwill Industries of

Central Indiana worked specifically with its Excel Centers, that “award graduates high school diplomas and industry-recognized certificates.”⁵³

Of the studied partnerships, MDRC notes that the Indiana partnerships had striking ways in which Generation Work could find potential to change organizational practices. In the analysis of the programs’ data, each found evident racial and ethnic disparities, instigating leaders within the groups to renew efforts in their organizations’ diversity and inclusion spaces. This renewed effort allowed one of the programs to uncover “issues related to a local employer’s hiring practices that adversely affected young adults of color,”⁵⁴ which they responded to by finding incentives for local employers to hire young adults of color. These incentives included tax abatements and connecting employers to neighborhood partners to help young adults of color mitigate barriers to employment like “housing, transportation, and child care.”⁵⁵

Incentives for employers have been found to help young adults of color mitigate barriers to employment such as housing, transportation, and child care

Modern Apprenticeships

Modern Apprenticeship is “ a three-year program designed to prepare Marion County high school students for the workforce”⁵⁶ where students can earn college credits and certifications, gain hands-on experience, discover new career options, and build a professional network. The program is partnered with high schools across Marion County, as well as a long list of central Indiana employers.⁵⁷ Available pathways include Advanced Manufacturing, Business Operations, Information Technology, Finance, Education, Healthcare, and Construction, though not all programs are offered at all high schools. This 3 year program is open for all students who have guardian permission, good attendance, authorized to work in the US, have room in their schedule, and are “on track” to graduate. Programs can have flexibility regarding placement, trying different departmental roles, and tuition assistance depending on the partnering company.⁵⁸

Potential boons to employers include diversifying the workplace, establishing a talent pipeline, meeting future and current staffing needs, and more. Modern Apprenticeship supplies onboarding support, recruitment, business and apprenticeship training, and ongoing support to the students, in addition to the business’s resources.⁵⁹ Schools also have access to external support to coordinate the apprenticeships, including being able to consult with students and their Work-Cased Learning Coordinator and EmployIndy’s Career Pathways Manager. EmployIndy further “supports the recruitment effort of students through resume and interview preparation and ongoing wrap-around support throughout students’ apprenticeship experiences.”⁶⁰

Remaining Gaps

There are benefits to having programs that target specific populations or reasons for unemployment, but one of the gaps that lingers in every employment market is that of the “double bind.” In the realm of public policy, the double bind is, loosely, situations or discourse that “create contradictory outcomes for vulnerable groups,”⁶¹ such as “simple dilemmas where a vulnerable group must choose between one of two courses of action”⁶² or, more severely, where “no matter how a group presents its identity, the institutional discourse in question stigmatizes the group”⁶³ which can often intensify the harm a marginalized individual or community experiences.⁶⁴

In the context of employment, the double bind could be experienced by someone who is a veteran and is also formerly convicted. They may have access to programs for veterans and for those who are formerly convicted, but, first, there are unique experiences that this individual may face as being part of both groups that are not addressed by either program and, second, it’s possible that, because of their membership in two groups, they may be passed over for scholarships or other assistance because it is assumed they can get further assistance elsewhere; this is one, of many, cases of falling through the gaps in social welfare, and an all-too-common one at that.

Notably, all of the programs listed in the “existing solutions” section serve, or primarily serve, the Indianapolis area. A major facet of this issue is that the only programs that are chosen for study and comparison to other programs are the ones that are more likely to receive state and federal funding: those in urban areas, namely Indianapolis. This presents a classic chicken-and-egg problem; programs are more likely to be funded if there is already evidence that similar projects in similar areas were shown to be successful, and projects are more likely to be studied if there is promise in the region or in similar regions to fund similar programs. Thus, rural areas are in their own “double bind.” They must somehow have funded studied programs, while urban areas are receiving a majority of study and funding.

Data is not just a problem for rural areas. One of the noted major concerns in the evaluation of Indiana programs is of the collection of appropriate data to evaluate its programs, including their outcomes and quality. Particularly of note is the lack of data on Hoosier work-based learning programs, which is generally viewed as a good first step for many future employees. While the Indiana General Assembly has performed a workforce program review from 2018 to the present, this is a short window to measure programs' effectiveness. The most recent report states that “efforts to track performance outcomes and refine programs accordingly is increasingly important as the state is facing declines in college-going rates, diminishing postsecondary completions, and labor force shortages”⁶⁵ as an important task to move forward with

these programs and their evaluation. Without this data, Indiana cannot evaluate the return on investment for their programs and can't know what is and isn't working, making it difficult to adapt to changing labor markets and demand.⁶⁶ Indicative of this is the disconnect between workforce development stakeholders, employers, and job seekers in Indiana, presenting programs, data collection, and services that are misaligned with the goals of the actual community they are supposed to serve.

Many workforce programs, especially in rural areas, fail to reach critical scale and effectiveness due to a variety of systemic factors, including lack of sufficient funding

A further problem that the dearth of data contributes to is the inability of most programs to reach critical scale and effectiveness. This is part of the complexity of addressing unemployment as a symptom; there will always be gaps until structural issues are addressed. So, while the following programs and program attributes are promising, it's important not to put the weight of structural issues on the backs of social welfare programs, as most of them treat symptoms, not causes. For long-term effects, there must be an equal focus on reducing the impacts of structural barriers and on removing the structural barriers themselves. However, it should be noted that increasing the amount of data collected without a targeted plan does little for the unemployed or affected populations, except to increase surveillance on them. While more data is necessary, it is also important to focus on collecting targeted and applicable data, and not just a grab bag of any data available.

Employment Facilitating Attributes

A 2020 analysis of the Metro Indianapolis area concluded with several important factors of successful workforce development programs for "good and promising jobs," including investing in education and training that aligns with both employers' and employees' goals, using pipeline opportunities and career ladders, reducing or relaxing strict educational/certificate requirements where applicable, being more cognizant of geographic considerations, and keeping a broader career pathway in mind during job transitions.⁶⁷ Other best practices include scaling up evidence-based strategies, restoring access to funding like Pell Grants for the formerly incarcerated, investing in career pathways, focusing investments and research on marginalized populations in order to center equity, investing in infrastructure, and increasing cross-system alignment.⁶⁸

In the review of RecycleForce, researchers noted that the program had some of the most sustained and successful outcomes of the studied programs, "consistent with previous research, which found that intensive services, including transitional jobs programs, can be effective at reducing recidivism among those at highest risk."⁶⁹ In all the studied programs, short-term employment and earnings were likely to be increased

but long-term effectiveness in those areas was lacking. The report urged policy makers to be more specific in their goals for employment programs, which will perhaps improve long-term effectiveness for the narrow population each program serves.⁷⁰

However, it is vital to remember that welfare and employment readiness programs are not a magic bullet. For example, one of the often-cited solutions for populations that experience structural barriers to employment is that of Career and Technical Education, most often trade or vocational programs. While this is personally and socially valuable, well-paying work, it is worth noting that shifting historically under-resourced populations into trade school does not solve the structural issue that is their barrier to employment, whether it be a lack of supportive figures, low income, low expectations, or a vast array of other identity-specific hurdles that individuals face. Further, pushing marginalized populations into vocational schools as a solution to unemployment will perpetuate gaps in earning and academic achievement, creating a similar “tracking” problem seen in educational settings.

Instead of promoting trade school as the best or only option for those who experience frequent or high barriers to employment, a more holistic strategy would be to address the underlying structural barriers that 1) prevent historically marginalized individuals from having the full spectrum of choice in education and employment and 2) reduce and remove the stigma for trade and vocational professions so that these professions see an influx of capable students who want to be there. The goal should not be for the trade industry to be an overflow for anyone who struggles with employment but rather for all workers to have choices between promising, well-paid jobs and career paths, including trade and vocational professions.

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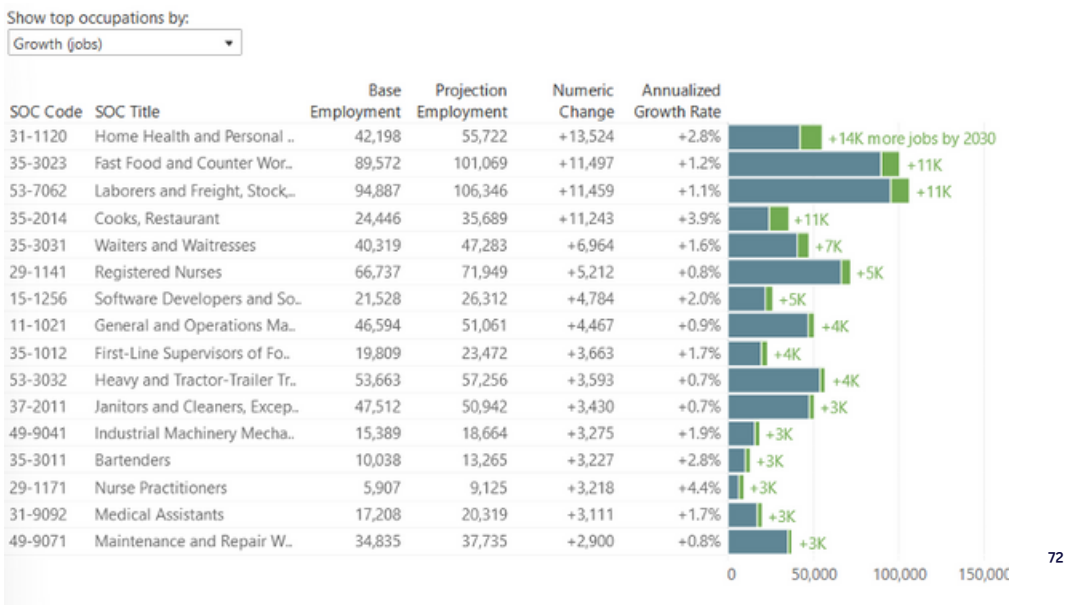
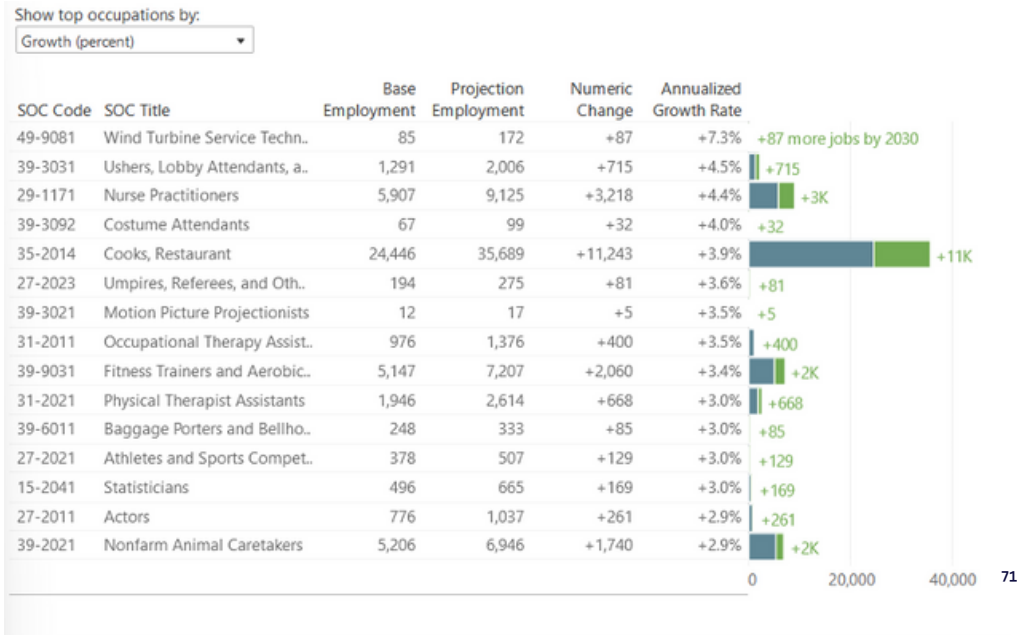
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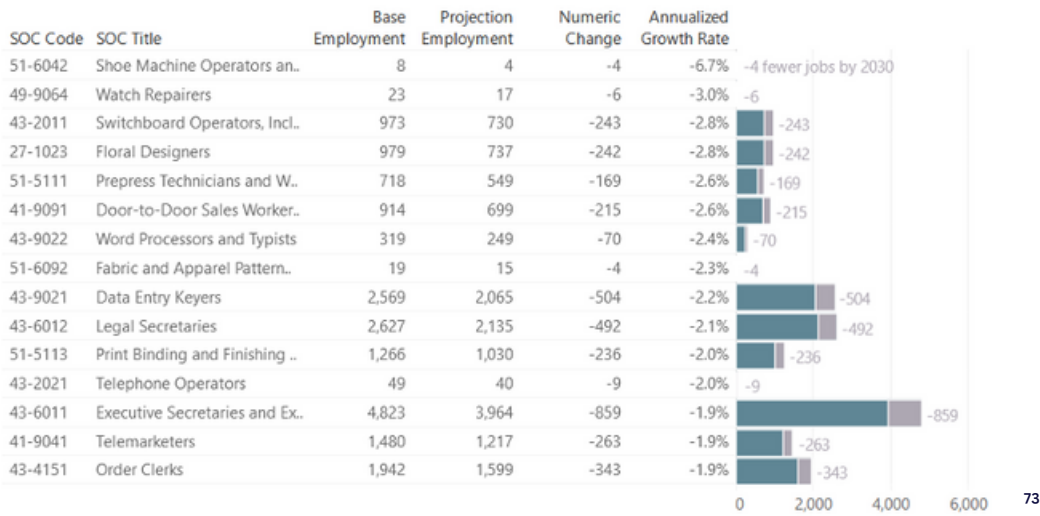
Appendices

Appendix A: Indiana Occupational Projections



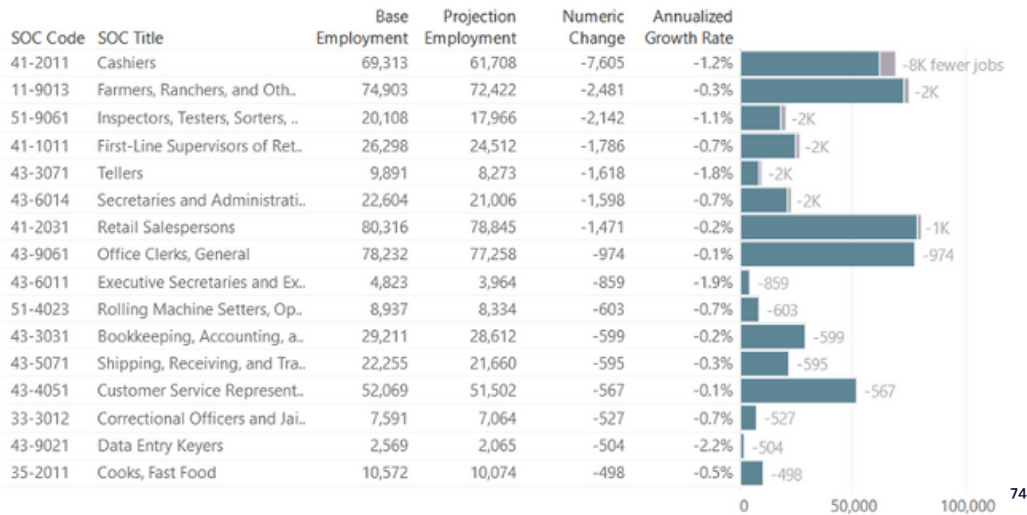
Show top occupations by:

Decline (percent) ▾



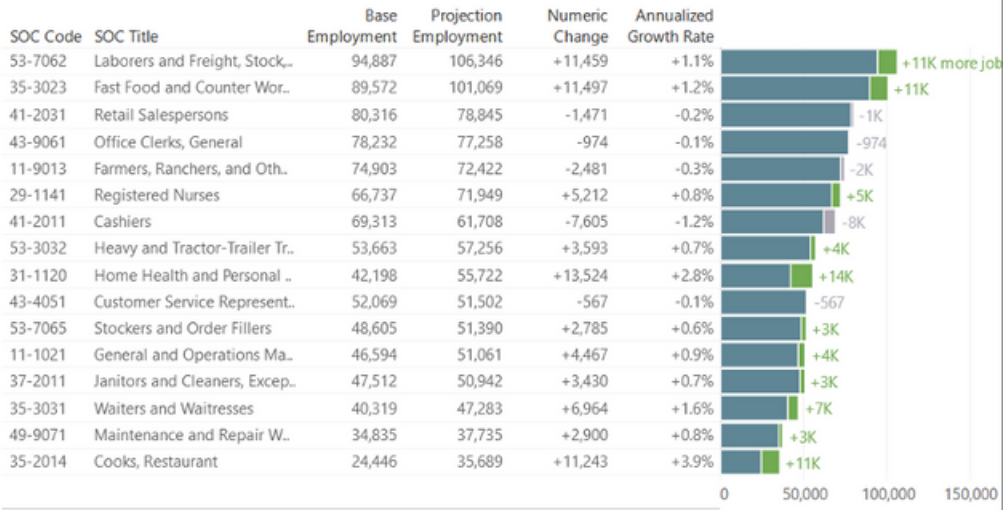
Show top occupations by:

Decline (jobs) ▾



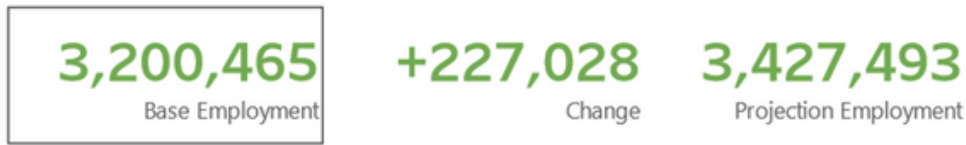
Show top occupations by:

Projected employment



75

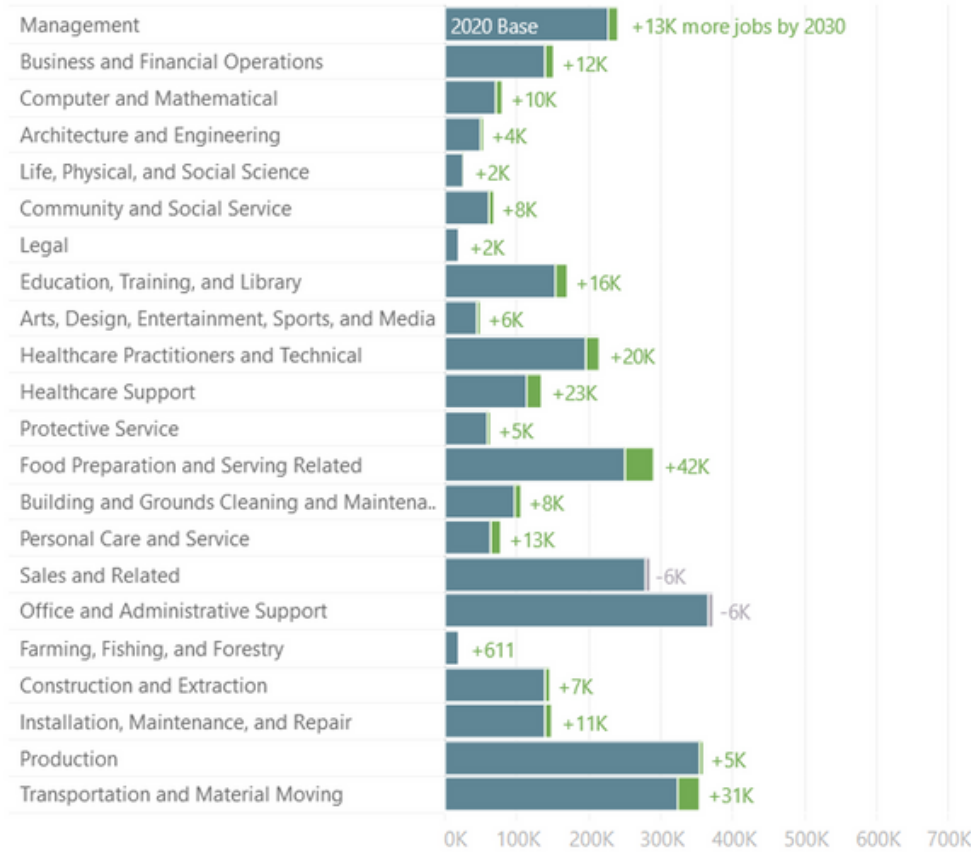
All Occupations in Indiana (Statewide)



By Broad Occupation Group

Choose Measure

Employment



76

All Occupations in Indiana (Statewide)

3,200,465

Base Employment

+227,028

Change

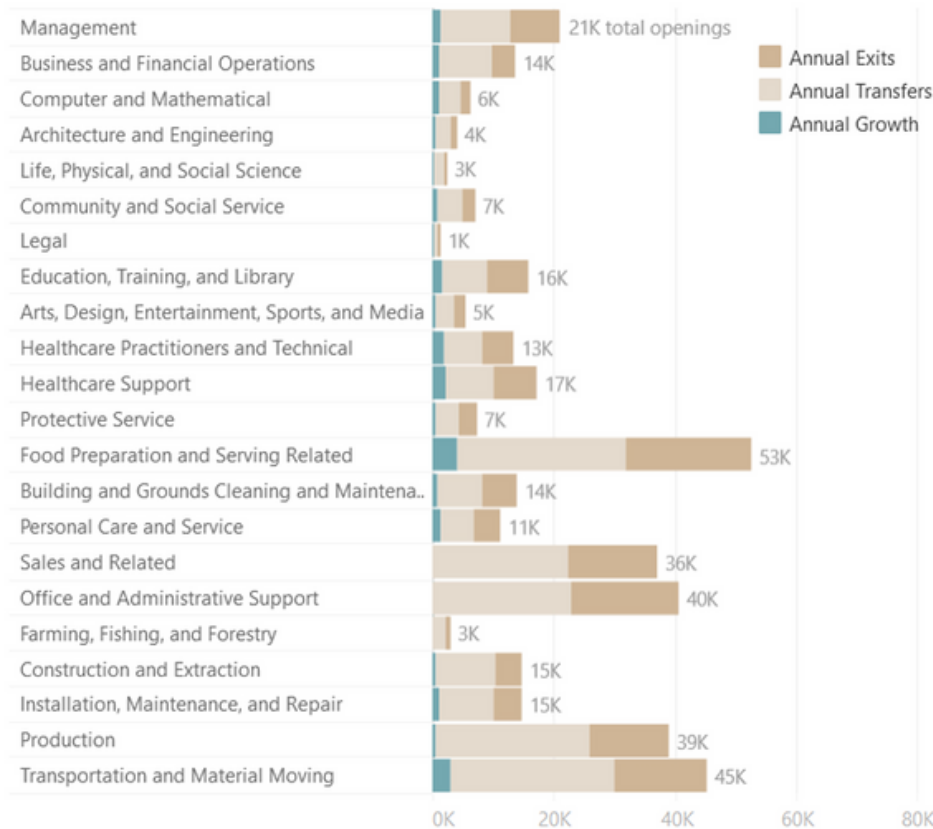
3,427,493

Projection Employment

By Broad Occupation Group

Choose Measure

Openings



About the Indiana Fiscal Policy Institute

The Indiana Fiscal Policy Institute is Indiana's only independent statewide source of continuing research into the impact of state taxing and spending policies in Indiana. The IFPI is privately supported by a variety of organizations, corporations, associations, and individuals in Indiana and surrounding states. IFPI's Mission is to enhance the effectiveness and accountability of state and local government through the education of public sector, business, and labor leaders on significant fiscal policy issues and the consequences of state and local decisions. The Institute makes a significant contribution to the important, ongoing debate over the appropriate role of government. The Institute does not lobby, support, or oppose candidates for public office. Instead, it relies on objective research evidence as the basis for assessing sound state fiscal policy.

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