

**Program Endorsement Brief: 0506.40/Small Business and Entrepreneurship
Business in Horticulture and Landscape Design**
Orange County Center of Excellence, March 2022

Summary Analysis

Program Endorsement:	Endorsed: All Criteria Met <input type="checkbox"/>	Endorsed: Some Criteria Met <input checked="" type="checkbox"/>	Not Endorsed <input type="checkbox"/>
Program Endorsement Criteria			
Supply Gap:	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	
Living Wage: (Entry-Level, 25th)	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	
Education:	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	
Emerging Occupation(s)			
	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	

The Orange County Center of Excellence for Labor Market Research (COE) prepared this report to provide Los Angeles/Orange County regional labor market supply and demand data related to one middle-skill occupation: *first-line supervisors of landscaping, lawn service, and groundskeeping workers* (37-1012). Middle-skill occupations typically require some postsecondary education, but less than a bachelor’s degree.¹ This report is intended to help determine whether there is demand in the local labor market that is not being met by the supply from community college programs that align with the relevant occupations.

Though *first-line supervisors of landscaping, lawn service, and groundskeeping workers* is not directly related to the Small Business and Entrepreneurship TOP code (0506.40), this proposed program is designed to teach students business skills that will allow them to create their own horticulture or landscape design business. These skills include reviewing and developing contracts, project and staff management, and billing and accounting. Throughout Los Angeles and Orange counties, nearly 78% of landscaping services businesses have fewer than 10 employees and 44% of *first-line supervisors of landscaping, lawn service, and groundskeeping workers* are considered self-employed.

Based on the available data there appears to be a supply gap for *first-line supervisors of landscaping, lawn service, and groundskeeping workers* in the region. Furthermore, while this occupation typically requires a high-school diploma or equivalent, nearly one-third of workers in the field have completed some college or an associate degree as their highest level of education. However, entry-level wages are lower than the living wage in both Los Angeles and Orange counties. **Therefore, due to some of the criteria being met, the COE endorses this proposed program.** Detailed reasons include:

¹ The COE classifies middle-skill jobs as the following:

- All occupations that require an educational requirement of some college, associate degree or apprenticeship;
- All occupations that require a bachelor’s degree, but also have more than one-third of their existing labor force with an educational attainment of some college or associate degree; or
- All occupations that require a high school diploma or equivalent or no formal education, but also require short- to long-term on-the-job training where multiple community colleges have existing programs.

Demand:

- **Supply Gap Criteria** – Over the next five years, there is projected to be **611 jobs available annually** in the region due to retirements and workers leaving the field, **which is more than the 390 awards conferred annually** by educational institutions in the region.
- **Living Wage Criteria** –Within Orange County, **typical entry-level hourly wages** for *first-line supervisors of landscaping, lawn service, and groundskeeping workers* are **\$18.44, which is lower than the** living wage for one adult in the region (\$20.63 in Orange County).²
 - However, 44% of workers employed in this occupation are considered self-employed. **Self-employed workers have different earnings dynamics than wage and salaried workers, making direct comparisons difficult.**
- **Educational Criteria** – The Bureau of Labor Statistics (BLS) lists a **high school diploma or equivalent** as the typical entry-level education for *first-line supervisors of landscaping, lawn service, and groundskeeping workers*.
 - However, the national-level educational attainment data indicates **30.4% of workers in the field have completed some college or an associate degree** as their highest level of education.

Supply:

- There are **23 community colleges** in the LA/OC region that issue awards related to *first-line supervisors of landscaping, lawn service, and groundskeeping workers*, conferring an average of **296 awards annually** between 2017 and 2020.
- Between 2016 and 2019, there was an average of **94 awards conferred annually** in related training programs by non-community college institutions, all of which were generated by **seven individual four-year colleges** throughout the region.

Occupational Demand

Exhibit 1 shows the five-year occupational demand projections for *first-line supervisors of landscaping, lawn service, and groundskeeping workers*. In Los Angeles/Orange County, the number of jobs related to these occupations is projected to decrease by 4% through 2025. However, there will be more than 600 job openings per year through 2025 due to retirements and workers leaving the field.

This report includes employment projection data by Emsi which uses EDD information. Emsi's projections are modeled on recorded (historical) employment figures and incorporate several underlying assumptions, including the assumption that the economy, during the projection period, will be at approximately full employment. To the extent that a recession or labor shock, such as the economic effects of COVID-19, can cause long-term structural change, it may impact the projections. At this time, it is not possible to quantify the impact of COVID-19 on projections of industry and

² Living wage data was pulled from California Family Needs Calculator on 1/10/2022. For more information, visit the California Family Needs Calculator website: <https://insightcced.org/family-needs-calculator/>.

occupational employment. Therefore, the projections included in this report do not take the impacts of COVID-19 into account.

Exhibit 1: Occupational demand in Los Angeles and Orange Counties³

Geography	2020 Jobs	2025 Jobs	2020-2025 Change	2020-2025 % Change	Annual Openings
Los Angeles	4,066	3,933	(133)	(3%)	416
Orange	1,935	1,829	(105)	(5%)	194
Total	6,001	5,762	(239)	(4%)	611

Wages

The labor market endorsement in this report considers the entry-level hourly wages for *first-line supervisors of landscaping, lawn service, and groundskeeping workers* in Orange County as they relate to the county’s living wage. Los Angeles County wages are included below in order to provide a complete analysis of the LA/OC region. Detailed wage information, by county, is included in Appendix A.

It is important to note that 44% of workers employed in this occupation in the region are considered to be “self-employed.” Workers are considered self-employed if they are the owner of an incorporated or non-incorporated business.⁴ Self-employed workers have different earnings dynamics than wage and salaried workers, making direct comparisons difficult. Examples include deciphering what is a return to labor versus a return to capital, as well as showing possible negative earnings if expenses or investments exceed gross receipts.⁵ For these reasons, self-employed wage data appears low throughout the region and brings the average wages for all workers in these occupations down.

Orange County: The typical entry-level hourly wages for *first-line supervisors of landscaping, lawn service, and groundskeeping workers* are \$18.44, which is below the living wage for one adult (\$20.63 in Orange County). Experienced workers can expect to earn wages of \$35.22, which is higher than the living wage estimate. Orange County’s average wages are above the average statewide wage of \$27.71 for this occupation.

Los Angeles County: The typical entry-level hourly wages for *first-line supervisors of landscaping, lawn service, and groundskeeping workers* are \$16.41, which is below the living wage for one adult (\$18.10 in Los Angeles County). Experienced workers can expect to earn wages of \$33.90, which is higher than the living wage estimate. Los Angeles County’s average wages are below the average statewide wage of \$27.71 for this occupation.

³ Five-year change represents new job additions to the workforce. Annual openings include new jobs and replacement jobs that result from retirements and separations.

⁴ <https://www.census.gov/topics/employment/industry-occupation/about/class-of-worker.html>

⁵ https://www.brookings.edu/wp-content/uploads/2019/11/201911_Brookings-Metro_low-wage-workforce_Ross-Bateman.pdf

Job Postings

There were 226 online job postings related to *first-line supervisors of landscaping, lawn service, and groundskeeping workers* listed in the past 12 months. The highest number of job postings were for landscape foremen, landscape crew leaders, landscape supervisors, grounds supervisors, and landscape construction supervisors. The top skills were scheduling, landscaping, budgeting, production management, and predictive/preventative maintenance. The top three employers, by number of job postings, in the region were Brightview Landscaping Services, University of Southern California, and Stay Green Incorporated.

It is important to note that the job postings data included in this section reflects online job postings listed in the past 12 months and does not yet demonstrate the impact of COVID-19. While employers have generally posted fewer online job postings since the beginning of the pandemic, the long-term effects are currently unknown.

Educational Attainment

The Bureau of Labor Statistics (BLS) lists a high school diploma or equivalent as the typical entry-level education for *first-line supervisors of landscaping, lawn service, and groundskeeping workers*. However, the national-level educational attainment data indicates 30.4% of workers in the field have completed some college or an associate degree as their highest level of education. Of the 34% of job postings related to *first-line supervisors of landscaping, lawn service, and groundskeeping workers* listing a minimum education requirement in Los Angeles/Orange County, 80.5% (62) requested high school or vocational training and 19.5% (15) requested a bachelor's degree.

Educational Supply

Community College Supply—Exhibit 2 shows the three-year average number of awards conferred by community colleges in the related TOP codes: Horticulture (0109.00), Landscape Design and Maintenance (0109.10), Nursery Technology (0109.30), Turfgrass Technology (0109.40), and Small Business and Entrepreneurship (0506.40). The colleges with the most completions in the region are: Mt. San Antonio, Saddleback, and Cerritos. Over the past 12 months, there were no other related program recommendation requests from regional community colleges.

Exhibit 2: Regional community college awards (certificates and degrees), 2017-2020

TOP Code	Program	College	2017-2018 Awards	2018-2019 Awards	2019-2020 Awards	3-Year Award Average
0109.00	Horticulture	El Camino	-	1	10	4
		LA Pierce	13	5	6	8
		Long Beach	11	4	8	8
		Mt San Antonio	4	7	3	5
		LA Subtotal	28	17	27	24
		Fullerton	1	-	2	1
		Orange Coast	9	15	23	16
		Saddleback	16	13	17	15

TOP Code	Program	College	2017-2018 Awards	2018-2019 Awards	2019-2020 Awards	3-Year Award Average
		OC Subtotal	26	28	42	32
		Supply Subtotal/Average	54	45	69	56
0109.10	Landscape Design and Maintenance	LA Pierce	6	-	-	2
		Mt San Antonio	20	33	11	21
		LA Subtotal	26	33	11	23
		Fullerton	2	3	5	3
		Orange Coast	-	2	3	2
		Saddleback	4	11	37	17
		OC Subtotal	6	16	45	22
		Supply Subtotal/Average	32	49	56	46
0109.30	Nursery Technology	Mt San Antonio	3	8	1	4
		LA Subtotal	3	8	1	4
		Fullerton	3	4	4	4
		OC Subtotal	3	4	4	4
		Supply Subtotal/Average	6	12	5	8
0109.40	Turfgrass Technology	Mt San Antonio	2	5	3	3
		LA Subtotal	2	5	3	3
		Supply Subtotal/Average	2	5	3	3
0506.40	Small Business and Entrepreneurship	Cerritos	21	34	38	31
		Citrus	1	2	-	1
		East LA	-	-	4	1
		Glendale	2	-	1	1
		LA City	3	7	5	5
		LA Pierce	-	4	4	3
		LA Trade	7	6	6	6
		Mt San Antonio	18	32	26	25
		Pasadena	5	3	9	6
		Rio Hondo	15	7	6	9
		Santa Monica	10	9	19	13
		West LA	3	5	4	4
		LA Subtotal	85	109	122	105
		Coastline	10	5	4	6
		Cypress	2	4	7	4
		Fullerton	3	4	3	3
Golden West	3	2	13	6		

TOP Code	Program	College	2017-2018 Awards	2018-2019 Awards	2019-2020 Awards	3-Year Award Average
		Irvine	18	48	56	41
		Saddleback	10	8	14	11
		Santa Ana	4	7	5	5
		Santiago Canyon	4	-	-	1
		OC Subtotal	54	78	102	78
		Supply Subtotal/Average	139	187	224	183
		Supply Total/Average	233	298	357	296

Non-Community College Supply—For a comprehensive regional supply analysis, it is also important to consider the supply from other institutions in the region that provide training programs for *first-line supervisors of landscaping, lawn service, and groundskeeping workers*. Exhibit 3 shows the annual and three-year average number of awards conferred by these institutions in the related Classification of Instructional Programs (CIP) Code: Entrepreneurship/Entrepreneurial Studies (52.0701) and. Due to different data collection periods, the most recent three-year period of available data is from 2016 to 2019. Between 2016 and 2019, four-year colleges in the region conferred an average of 94 awards annually in related training programs.

Exhibit 3: Regional non-community college awards, 2016-2019

CIP Code	Program	College	2016-2017 Awards	2017-2018 Awards	2018-2019 Awards	3-Year Award Average
52.0701	Entrepreneurship/Entrepreneurial Studies	Azusa Pacific University	-	1	-	0
		California Intercontinental University	9	9	10	9
		Loyola Marymount University	72	74	66	71
		Mount Saint Mary's University	15	9	10	11
		Mt Sierra College	3	-	-	1
		Pepperdine University	2	1	-	1
		Pitzer College	-	-	1	0
		Supply Total/Average	101	94	87	94

Appendix A: Occupational demand and wage data by county

Exhibit 4. Orange County

Occupation (SOC)	2020 Jobs	2025 Jobs	5-Yr Change	5-Yr % Change	Annual Openings	Entry-Level Hourly Earnings (25 th Percentile)	Median Hourly Earnings	Experienced Hourly Earnings (75 th Percentile)
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers (37-1012)	1,935	1,829	(105)	(5%)	194	\$18.44	\$24.73	\$35.22

Exhibit 5. Los Angeles County

Occupation (SOC)	2020 Jobs	2025 Jobs	5-Yr Change	5-Yr % Change	Annual Openings	Entry-Level Hourly Earnings (25 th Percentile)	Median Hourly Earnings	Experienced Hourly Earnings (75 th Percentile)
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers (37-1012)	4,066	3,933	(133)	(3%)	416	\$16.41	\$23.40	\$33.90

Exhibit 6. Los Angeles and Orange Counties

Occupation (SOC)	2020 Jobs	2025 Jobs	5-Yr Change	5-Yr % Change	Annual Openings
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers (37-1012)	6,001	5,762	(239)	(4%)	611

Appendix B: Sources

- O*NET Online
- Labor Insight/Jobs (Burning Glass)
- Economic Modeling Specialists, International (Emsi)
- Bureau of Labor Statistics (BLS)
- Employment Development Department, Labor Market Information Division, OES
- California Community Colleges Chancellor's Office Management Information Systems (MIS)
- California Family Needs Calculator, Insight Center for Community Economic Development
- Chancellor's Office Curriculum Inventory (COCI 2.0)

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March 2022

