A DIFFERENT KIND OF REPORT

THE FOLLOWING PAGES ARE INTENDED TO PROVIDE CREDIBLE, TIMELY INSIGHTS you need as an employer to make confident decisions in a fast-changing talent landscape. You will also find resources in each section to help you make sense of the data and move to action.

Much of the data and analysis is entirely original – the product of focus groups, surveys and third-party research reports conducted in 2016 that have never before been published. Combined, this information provides an honest, penetrating look at the forces driving some of the most competitive segments of the workforce: newcomers, professionals of color, tech professionals and others.

We are sharing this information with employers in the Minneapolis-Saint Paul region because helping recruiters, human resources leaders, diversity and inclusion specialists, hiring managers and others do their jobs even more effectively is one of the ways Make It. MSP. is working to increase the region’s performance on retaining and attracting talent. The report was produced by GREATER MSP – the Minneapolis-Saint Paul Regional Economic Development Partnership – the organization responsible for driving the region’s competitiveness strategy.

We hope this data helps you drive change within your organization and increases your motivation to engage on these subjects with other employers and community institutions.
OUR BIGGEST STRENGTH COULD BECOME OUR BIGGEST CHALLENGE.

TALENT HAS LONG BEEN OUR REGION’S TOP COMPETITIVE ADVANTAGE. With 16 Fortune 500 companies in a diversified economy, greater Minneapolis-Saint Paul have long enjoyed one of the highest concentrations of professional talent in the nation.

But the future does not bode well if we take a “business as usual approach.” Projections have shown that we could face a shortage of 100,000 professionals by 2020. No wonder regional employers have identified finding talent as the #1 competitive issue facing them today. While the information that follow is not everything we know, it provides a preliminary look at those key areas.

We aren’t alone. Employers across the nation are facing the same talent shortage crisis. Our region is competing with other regions to attract and retain highly skilled talent.

In the past, we have relied on major employers to attract and retain talent. The size and urgency of the talent challenge, however, requires an expanded, coordinated effort. That’s why GREATER MSP is working with employers and community leaders to fill the talent gap.

We call it MAKE IT. MSP.

This report will identify the region’s key talent issues and opportunities and will suggest ways in which you can support the region’s efforts to maintain its top competitive advantage.

MSP Mingle at Ecolab brought together 200+ diverse professionals from employer groups and networks throughout the Minneapolis-Saint Paul region. This installment in the rotating series among MSP employers featured multiple speakers including Ecolab CEO Doug Baker. Sponsored by the Saint Paul Area Chamber of Commerce.
PROFESSIONAL TALENT FUELS OUR ECONOMY AND QUALITY OF LIFE

A DISPROPORTIONATELY HIGH CONCENTRATION OF PROFESSIONAL TALENT in the Minneapolis-Saint Paul region helps fuel our economy and quality of life. People with a BA and above, and people working in creative industries are in high demand among employers and enjoy significantly lower unemployment rates and increasing career options. Attracting and retaining professional talent matters not only to employers looking to fill positions, but leaders throughout the community who are seeking increased tax revenues, philanthropic giving and civic engagement.

GREATER MSP’S CONCENTRATION OF PROFESSIONAL TALENT IS RANKED HIGHER AMONG PROFESSIONALS WITH CHILDREN

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<td>DALLAS-FW</td>
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% POPULATION 23+ WITH 4+ YEARS COLLEGE, EMPLOYED WITH HOUSEHOLD INCOME $100K

Source: Decennial Census Data, IPUMS Microdata, U of M Population Center.
Myles Shaver U of M

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<td>DALLAS-FW</td>
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% POPULATION 23+, 4+ YEARS COLLEGE, EMPLOYED, HOUSEHOLD INCOME $100K, WITH CHILD IN HOUSEHOLD 5-19 YEARS OLD
HOW THE TALENT ATTRACTION AND RETENTION LANDSCAPE HAS CHANGED

THE MARKET HAS TIGHTENED

- CANDIDATES ARE ALWAYS PASSIVELY-SEEKING
- CANDIDATES ARE BETTER CONNECTED AND MOBILE
- DEVELOPING TALENT ALONE ISN’T ENOUGH

EMPLOYERS NEED TO RECRUIT NEW TALENT

GREATER MSP HAS A HIGH DEMAND FOR PROFESSIONAL TALENT

29%

ESTIMATED PERCENT OF MSP JOBS REQUIRING B.A. DEGREE OR ABOVE

Source: EMSI, Q4 2016

PROFESSIONAL JOBS CREATE AN ADDITIONAL 3.5 JOBS IN THE LOCAL ECONOMY

4.5 JOBS FOR EACH PROFESSIONAL JOB

1.75 FOR EACH LOW-WAGE JOB

Source: GREATER MSP Research

NATIONAL CHALLENGE AND LOCAL PERFORMANCE

Regions throughout the country are responding to the competitive pressure to better retain and attract talent. To compete, Greater MSP will need to maintain its retention edge in the face of national competition while significantly improving its performance attracting talent from outside the state.

IN TOP 25 METROS RETAINING PROFESSIONAL TALENT

#1

IN TOP 25 METROS ATTRACTING PROFESSIONAL TALENT

#19

MILLENNIAL NET MIGRATION (25-34 YEAR OLDS)

Source: Myles Shaver, U of M

<table>
<thead>
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<th>City</th>
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<td>Austin</td>
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<td>Seattle</td>
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<td>San Francisco</td>
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US Census Bureau, American Community Survey
PEOPLE AND ORGANIZATIONS THROUGHOUT GREATER MSP have come together to form Make It. MSP. - a movement to attract, welcome, retain, and elevate the workforce of the future. In its first year of implementation, teams worked across different sectors, geographies, and backgrounds to collect the insights and build the networks needed to take strategic action at scale. Data and analysis led to a focus on key occupations and communities in 2016 including newcomers, professionals of color, tech professionals and employer talent teams.

Check out tools and job listings at makeitmsp.org
Organizations working in collaboration include companies, nonprofits, cities, colleges and universities, meetup groups, foundations, governments and more.

Motivated teams of cross-sector organizations with mission alignment worked to develop regional strategies for newcomers, professionals of color, tech professionals and employer talent teams.

Teams worked in three major zones in 2016: events, storytelling, and insights. Insights were gathered directly from more than 5,000 professionals in and beyond MSP.

Cross-sector teams focused on each target area, along with a Makers Hub collaborative of community groups, worked together in 2016 to gather and analyze data, build and connect major events, and use the shared platform for regional storytelling. They are working to implement strategies to improve performance.

WHAT IS MAKE IT. MSP.?

GREATER MSP organized a Talent Task Force in 2014, comprised of private and institutional, emerging and established leaders. Along with a Design Team of young professional talent, the Task Force analyzed new data and identified key obstacles and strategic goals.

MAKE IT. MSP.
STRATEGIC GOALS

1. IMPROVE SOCIAL INCLUSION
2. SUPPORT INNOVATIVE TALENT
3. CONNECT TALENT TO COMMUNITY
4. CONNECT TALENT TO EMPLOYERS
5. CLOSE NEAR-TERM TALENT GAPS
NEWCOMERS

SHE MAY BE NEWLY RECRUITED BY ONE OF OUR MAJOR EMPLOYERS. He may be following a spouse or partner. She may be returning home after leaving for school or a first job. Whatever their story, they have one thing in common: they don’t have to stay here. And the younger they are, the bigger the chance they won’t.
TOP 5 MSP ATTRIBUTES THAT MATTERED MOST TO NEWCOMERS:

1. JOBS AND CAREERS
2. HOUSING COSTS
3. PROXIMITY TO FAMILY AND FRIENDS
4. FOOD AND ENTERTAINMENT
5. WELCOMING CULTURE

Newcomers think highly of MSP when it comes to many important regional attributes like the availability of “jobs and careers,” as well as “food and entertainment,” “arts and culture,” and “recreation and outdoors.” However, they rate the “welcoming culture” in MSP lower than any other attribute, in addition to lower scores for “diversity and inclusion” and “weather and climate.”

WHO WE HEARD FROM

We conducted 5 focus groups with 51 newcomers who moved to MSP in the previous 3 years.

Discussions facilitated by Melanie Allen (Welcome Matters) and Moira Grosbard (Network Careers) – both transplants to MSP with expertise on the newcomer experience.

822 NEWCOMERS

Among the 822 newcomers we heard from, journeys involved a move to MSP directly from 46 other U.S. states and 16 countries.

5 FOCUS GROUPS

We used the themes to design the MSP Welcome survey, hearing from 771 newcomers using the network built through Make It. MSP.

Survey distribution and analysis was led by GREATER MSP and Impact Hub MSP.
### The Newcomer Journey

#### Newcomers Challenges
Newcomers were asked about their most important issue or concern at distinct stages during their journey relocating to MSP. Open-ended responses varied with high concentration on personal connections.

#### Where Newcomers Go for Help
Newcomers were asked about resources that were helpful prior to relocation and while onboarding to the region. Open-ended responses emphasized peer recommendations and self-directed searches.

### Sooner to Arrive
**Where am I going to live and how will I commute?**

<table>
<thead>
<tr>
<th>1</th>
<th>Making Friends</th>
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<td>2</td>
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<td>Cost of Living</td>
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### Newly Arrived
**How can I break into social networks here?**

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<td>Realtors</td>
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<td>Employer Resources</td>
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<td>Social Media</td>
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Focus group conversations and survey results indicated that most newcomers are extremely satisfied and often surprised by the amenities of MSP, but more likely to struggle with personal connection. Those who reported an unsuccessful experience acclimating were among the most likely to project leaving their job and the region. Interestingly, the weather became less important throughout the journey, with relatively few respondents citing it as a major factor in whether to stay or leave.
TURNING DATA INTO ACTION | MSP HELLO

TENS OF THOUSANDS OF WORKING-AGE PEOPLE both arrive in and leave MSP each year, and in 2016 the Make It. MSP. Newcomer Team worked to personally welcome thousands of those new arrivals. The team will build on that progress and level up in 2017 through the launch of MSP HELLO, a project consisting of signature events, peer guides, community meetups and more presented in partnership with the Minneapolis Institute of Arts, Minnesota History Center, and an official team of collaborators. MSP HELLO is supported by the Knight Foundation.

FOCUS GROUP CONVERSATIONS AND SURVEY RESULTS indicated that most newcomers are extremely satisfied and often surprised by the amenities of MSP, but more likely to struggle with personal connection. Those who reported an unsuccessful experience acclimating were among the most likely to project leaving their job and the region. Interestingly, the weather became less important throughout the journey, with relatively few respondents citing it as a major factor in whether to stay or leave.

NEWCOMERS SATISFACTION

NEWCOMERS WHO ARE PERSONALLY SATISFIED 71%
NEWCOMERS WHO ARE PROFESSIONALLY SATISFIED 77%
NEWCOMERS WHO ARE SATISFIED WITH AMENITIES AND QUALITY OF LIFE 89%
NEWCOMERS WHO FEEL WELCOME IN MSP 65%
NEWCOMERS WHO SAY THEY ARE LIKELY TO BE HERE IN 3-5 YEARS 73%
Diverse professionals are the fastest growing segment of the workforce.

Diversity is a demographic reality for the Greater MSP region and the country moving forward. But inclusion, not a given, is an economic necessity for any place that wants to succeed moving forward.
There is a significant relationship between a more diverse leadership team and better financial performance. The companies in the top quartile of gender diversity were 15% more likely to have financial returns that were above their national industry median.

Companies in the top quartile of racial/ethnic diversity were 35% more likely to have financial returns above their national industry median.

Companies in the bottom quartile for both gender and ethnicity/race were statistically less likely to achieve above-average (and in fact lagged) financial returns than the average companies in the dataset.

The increasing diversity of MSP’s population and workforce creates significant opportunity for employers in the region.

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The increasing diversity of MSP’s population and workforce creates significant opportunity for employers in the region.
A COMPLEX STORY ABOUT RETENTION AND ATTRACTION

While the Greater MSP region ranks #1 among Top 25 metros at overall retention, the region ranks #14 at retaining professionals of color. That story changes yet again for professionals of color with school-age children in their household, who stay in Greater MSP at roughly the same rate as white professionals.

On the other hand, the Greater MSP region attracts professionals of color at higher rates overall than white professionals. According to a national survey conducted by Make It MSP, people of color are also 10% more likely to report willingness to move to the region, suggesting additional opportunities.

PROFESSIONALS OF COLOR IN MSP CITED “FAMILY TIES” AS THEIR TOP REASON TO STAY IN THE REGION AND THE “LACK OF DIVERSITY AND CULTURAL AWARENESS” AS THE TOP REASON NOT TO STAY. SOURCE: CONNECT MSP SURVEY

1,293 PROFESSIONALS OF COLOR

Among the 1,293 people we heard from, more than two-thirds had at least some experience living outside MSP.

6 FOCUS GROUPS

We conducted 6 focus groups with 65 professionals of color living throughout MSP.

Connect MSP survey administered by Dr. Janine Sanders Jones, University of St. Thomas.

Focus groups facilitated by Tamika Curry Smith (TCS Group) - a nationally leading Diversity & Inclusion practitioner.

We used the themes to design the Connect MSP survey, hearing from 1,228 people using the network built through Make It MSP. Survey distribution and analysis was led by Dr. Janine Sanders Jones.
REGIONAL PERCEPTIONS

ACROSS CULTURES AND ETHNICITIES, professionals of color living and working in Greater MSP shared perceptions of the region’s strengths and weaknesses. These perceptions reflect complex stories and experiences that are a result of myriad factors. No one experience is the same, but common themes emerged that can highlight pathways towards solutions.

REGIONAL ASSETS

- Livable/manageable
- Clean and safe
- Outdoors/parks
- Many events and activities
- Many career opportunities

AREAS TO IMPROVE

- Lack of culturally relevant social venues
- No go-to communications vehicles
- Silos among social/professional organizations
- Cliquish MSP natives
- Classism in MSP
- Lack of true support for diversity and inclusion

WHAT YOU CAN DO

PROFESSIONALS OF COLOR

TYPES OF ACTIONS PROFESSIONALS OF COLOR SUGGEST FOR EMPLOYERS.

- HIRE more people of color in leadership roles
- FOCUS on professional development (ex: certificates)
- COMMIT to retention efforts throughout the organization
- PROVIDE cultural training for all employees

COMMUNITY RESOURCES AVAILABLE TO EVERYONE

- LOCAL PRACTITIONERS AND EXPERTS at places like The Forum on Workplace Inclusion, Twin Cities Diversity and Inclusion Roundtable, and the YWCA
- DOZENS OF LOCAL PROFESSIONAL ASSOCIATIONS including Prospanica, National Association of Black Accountants, and Ascend NAAMBA
- LEADERSHIP GROUPS including African American Leadership Forum, Latino LEAD, and the Coalition of Asian American Leaders

TURNING DATA INTO ACTION | MSP MINGLE

TOGETHER WITH THE SAINT PAUL AREA CHAMBER OF COMMERCE, MAKE IT. MSP. began an unprecedented event series in 2016 to bring together employee resource groups from companies across the region. Make It. MSP. Enterprise Team members including Target, Ecolab, and HealthPartners stepped up to host these gatherings, which exist to provide opportunities for people to make meaningful connections to foster social inclusion. Hundreds of professionals of color working for employers throughout the region were able to connect with each other.
No matter what the industry, nearly every company is becoming a tech company. It’s why tech workers are among the hardest positions for employers to fill. Our region has many advantages for talent attraction, but we’ll need to build on them to outpace our national competition.
MSP is a tech giant hiding in plain sight, partially due to having one of the highest shares of tech labor force working in a corporate, subsidiary or regional HQ office (higher than places like Boston, Denver, Dallas, and Phoenix).

Source: EMSI Q3 2016.

A similar number left the region in 2015 as well. Tech professionals are willing to move here, but we need to work harder to keep them and compete with peer regions like Portland and Dallas to attract even more here.

Source: EMSI Q3 2016.

We need to hold and leverage that strength as markets like Seattle and Denver have enjoyed rising popularity among many tech graduates.

Source: EMSI Q3 2016.

Double-digit job growth in MSP over the last five years in key occupations plus continued projected growth means more opportunity that will need to be filled.

Source: EMSI Q3 2016.
TECH PERCEPTIONS IN GREATER MSP

In-depth interviews with dozens of local but highly mobile tech professionals revealed consistent perceptions of MSP as a tech destination, including strengths to build on, perceived weaknesses to address, and a largely positive view of the community’s momentum. Despite whether the person was a software developer at a Fortune 500 or a community group leader, common indicators like a vibrant startup scene emerged as significant indicators to tech professionals.

**PROS**
- CAN MAKE GLOBAL IMPACT
- INCREDIBLE QUALITY OF LIFE
- MORE TIME FOR SIDE PROJECTS

**CONS**
- NOT ENOUGH CUTTING-EDGE WORK
- RISK-averse CULTURE
- LACK OF VISIBLE SUCCESS STORIES

**POSITIVE TRENDS**
- COLLABORATIVE TECH COMMUNITY
- STARTUP SUCCESS AND ENTERPRISE INTEREST
- MEETUP AND EVENT SCENE

Source: Interviews by Matt Lewis, GREATER MSP and Steven Bruce, Carlson School of Management

TURNING DATA INTO ACTION | TWIN CITIES STARTUP WEEK

IN ADDITION TO FEEDBACK FROM LOCAL TECH PROFESSIONALS, external perception analysis indicates that people of all backgrounds and skills greatly value the entrepreneurial culture of regions they consider for relocation. Results also indicate that roughly half of people are willing to relocate for the right opportunity and would most value the chance to see the region firsthand. So, in fall 2016 the Make It. MSP Tech Team worked with Twin Cities Startup Week to promote and fly in talent from targeted markets for a week of events, co-working, job seeking, and more. Content captured at this year’s TCSW, which featured 10,000 participants across dozens of events, will be used to expand the program in 2017.
MSP companies posted more than 10,000 software development jobs in 2016 alone.

WITH MSP companies like UnitedHealth Group, Target, and U.S. Bank each posting hundreds of open jobs alongside small but fast-growing tech companies, competition is intensifying.

The most in-demand skills include: Java coders, JavaScript, SQL, Microsoft.NET framework, and C-Sharp.

Employers seeking the same skills can and should be working together to expand the pie in addition to slicing it.

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Source: CEB Talent Neuron
This is the first Make It. MSP. Insights report and a milestone of the initiative’s first year of implementation. In 2017, dozens of Make It. MSP. partner organizations will work to transform this data into action. Some of the ways we plan to do that include:

Enhancing existing tools for employer talent teams at MakeItMSP.org and building additional tools to more effectively reach these key groups and others.

Launching and implementing new regional strategies of the Make It. MSP. initiative including the MSP Hello project for newcomers and retention strategies for professionals of color.

Conducting digital and in-person outreach and engagement of key talent segments in targeted regions around the country.

Diving deeper into new talent groups while continuing to add layers of interpretation and understanding to the groups covered in this report.

We encourage you to use the digital tools, sign-up for updates and find ways to get involved.