AGI Webinars Series

Discussion on COVID-19 Impacts to the Geoscience Enterprise: Geoscience Employers and Non-academic Professionals

September 30, 2020
Introductions

Christopher Keane
Director of Geoscience Profession and Higher Education, AGI

Leila Gonzales
Technical Specialist, AGI
Teams Interface

- Please keep yourself muted when not talking
- Unmute yourself to join the discussion
- We are recording today’s webinar
Media Partners

American Institute of Professional Geologists
Agenda

• Overview of impacts and solutions from employers and the workforce
• Data from Geoscience COVID-19 study
• Open discussion with audience
  • Solutions / strategies for dealing with COVID-19 challenges
  • Questions for more research/investigation
Employers
Year-over-Year Change in Employment by Industry Sector

- Oil and gas extraction
- Architectural and engineering services
- Management and technical consulting services
- Colleges and universities
- Local government, excluding education
- Mining, except oil and gas
- Specialized design services
- Scientific research and development services
- Computer systems design and related services
- Support activities for mining and oil & gas
- Other professional and technical services
- State government, excluding education

Expectations for financial performance: current calendar year relative to last year

- February 2020:
  - Lower than last year: 41%
  - Similar to last year: 23%
  - Higher than last year: 17%

- June 2020:
  - Lower than last year: 58%
  - Similar to last year: 29%
  - Higher than last year: 13%

- July 2020:
  - Lower than last year: 55%
  - Similar to last year: 26%
  - Higher than last year: 14%

- August 2020:
  - Lower than last year: 60%
  - Similar to last year: 26%
  - Higher than last year: 14%

- September 2020:
  - Lower than last year: 69%
  - Similar to last year: 28%
  - Higher than last year: 3%
Received financial assistance in the past month

- Federal aid: 43%
- PPP: 29%
- EIDL: 11%
- State / Local Govt: 14%
- Self: 11%
- Other Sources: 14%
Small Business Pulse Survey

Professional, Technical and Scientific Services sector

Since March 13, 2020, has this business requested financial assistance from any of the following sources?

- Paycheck Protection Program
- Economic Injury Disaster Loans
- SBA Loan Forgiveness
- Other Federal Programs
- State or local government programs
- Banks
- Self
- Family or Friends
- Other sources
- No financial assistance requested from any source

Credit: AGI, data derived from the U.S. Census Bureau, Small Business Pulse Survey
Since March 13, 2020, has this business received financial assistance from any of these programs from the federal government?

![Chart showing percentage of businesses receiving financial assistance from various programs.]

- Paycheck Protection Program (PPP)
- Economic Injury Disaster Loans (EIDL)
- SBA Loan Forgiveness
- Other Federal Programs
- This business has not received financial assistance from any federal program since March 13, 2020

Credit: AGI, data derived from the U.S. Census Bureau, Small Business Pulse Survey
Since March 13, 2020, has this business requested financial assistance from any of the following sources?

- Paycheck Protection Program (PPP)
- Economic Injury Disaster Loans (EIDL)
- SBA Loan Forgiveness
- Other Federal Programs
- State or Local Government
- Banks
- Self
- Family or Friends
- Other
- No financial assistance requested from any source

Credit: AGI, data derived from the U.S. Census Bureau, Small Business Pulse Survey
Small Business Pulse Survey

Support Activities for Mining and Oil and Gas sector

Since March 13, 2020, has this business received financial assistance from any of these programs from the federal government?

- Paycheck Protection Program (PPP)
- Economic Injury Disaster Loans (EIDL)
- SBA Loan Forgiveness
- Other Federal Programs
- This business has not received financial assistance from any Federal Program since March 13, 2020

Credit: AGI, data derived from the U.S. Census Bureau, Small Business Pulse Survey
Expectation for 2020 permanent staffing levels

<table>
<thead>
<tr>
<th>Companies</th>
<th>February 2020</th>
<th>June 2020</th>
<th>July 2020</th>
<th>August 2020</th>
<th>September 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2%</td>
<td>16%</td>
<td>3%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Decrease in staffing</td>
<td>40%</td>
<td>69%</td>
<td>69%</td>
<td>68%</td>
<td>48%</td>
</tr>
<tr>
<td>No change</td>
<td>58%</td>
<td>16%</td>
<td>28%</td>
<td>18%</td>
<td>37%</td>
</tr>
<tr>
<td>Increase in staffing</td>
<td>2%</td>
<td>16%</td>
<td>3%</td>
<td>14%</td>
<td>15%</td>
</tr>
</tbody>
</table>
Expectation for 2020 temporary and contract staffing levels

<table>
<thead>
<tr>
<th>Companies</th>
<th>February 2020</th>
<th>June 2020</th>
<th>July 2020</th>
<th>August 2020</th>
<th>September 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>26%</td>
<td>19%</td>
<td>10%</td>
<td>2%</td>
<td>61%</td>
</tr>
<tr>
<td></td>
<td>67%</td>
<td>45%</td>
<td>62%</td>
<td>74%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7%</td>
<td>35%</td>
<td>28%</td>
<td>24%</td>
<td></td>
</tr>
</tbody>
</table>

Legend:
- Blue: Decrease in staffing
- Yellow: No change
- Green: Increase in staffing
Working from home is still the norm for most.

52% of companies have 76-100% of their employees working from home.

Limited in-office attendance is resuming slowly.

60% of companies report that up to 25% of their employees are working in the office part-time.

40% of companies report that up to 25% of their employees are working in the office full-time.
Has your organization provided assistance for obtaining equipment and/or supplies for employees working from home?

- Financial assistance to purchase equipment and supplies: 4%
- Provided equipment and supplies: 54%
- Provided equipment/supplies and financial assistance: 13%
- No assistance: 29%
Strategies

• Considered as an essential organization / service provider
• Investment in distributed team technologies
• Increased frequency of communication with teams
• Increase safety protocols for office and facilities
• Using cohorts for facility / office use
• Shifting of work to contractors instead of seasonal staff
• Capture knowledge of those leaving
• Increased marketing and contact with past and potential clients
• Frugality – using / reserving resources
New hires of geoscientists in the past month

- Full-time: 19%
- Part-time: 12%
- Intern: 8%
- No new hires: 69%
Hiring Challenges

• Hiring freezes and budgetary constraints
• Reliance on contractors due to uncertain hiring environment
• Interview process is not as effective as face-to-face meetings
• Willingness of potential employees to work onsite occasionally
• Lack of qualified candidates
Top concerns moderately to extremely driven by COVID-19:

- Workplace safety: 56%
- Financial outlook: 44%
- Hiring new employees: 40%
- Regulations related to business operations: 40%
Top concerns moderately to extremely driven by COVID-19

Workplace safety: 59%

Financial outlook: 52%

Hire new employees: 44%

Availability of resources / supply chain disruptions: 44%
Employees
Most of those gaining jobs are recent graduates from this year.

Majority of those who lost their jobs are seeking employment in the geosciences.
No deviation from long-term employment trends of recent graduates.

77% of unemployed recent graduates are seeking employment in the geosciences, and just over half are seeking employment outside the geosciences.

Most common reasons for seeking employment outside of the geosciences:
Lack of job in geosciences
Lack of skills or training
Project and work impacts, February 2020

- Projects deferred
- Active projects terminated
- Planned projects cancelled
- Impacts to meetings (cancelled, remote, etc.)
- Impacts to projects (delay, design change, etc.)
- Increased workload
- Layoffs / furloughs
- Travel restrictions
- Other
- No impact
Fieldwork impacts, February 2020

- Fieldwork deferred or delayed: 50%
- Planned fieldwork cancelled: 10%
- Active fieldwork terminated: 5%
- Increased health and safety protocols: 5%
- Increased workload: 2%
- Other: 2%
- No impact: 20%
Lab-based activity impacts, February 2020

- Terminated: 10%
- Deferred: 60%
- Limited staffing / hours: 20%
- No impact: 20%
- Other: 5%
Top concerns moderately to extremely driven by COVID-19

Workplace safety: 69%
Availability of employment opportunities: 39%
Job security: 34%
Top concerns moderately to extremely driven by COVID-19

Workplace safety: 65%
Availability of employment opportunities: 31%
Job security: 29%
Questions and Discussion

• What strategies have you found useful for weathering impacts from the pandemic?
• What skills, training, education are employers looking for in potential employees?
• Have employers changed what they are looking for in potential employees (skills, training, education, etc.)?
• What questions / topics would you be interested in seeing more data about?
Questions?
Email us at workforce@americangeosciences.org

Webinar recordings available at
www.americangeosciences.org/webinars

Geoscience COVID-19 Study & Data Briefs
www.americangeosciences.org/workforce/covid19