

**THE CLEVELAND COUNTY,
NORTH CAROLINA
AREA
WORKFORCE REPORT**

June, 2004

**Compiled and Prepared by
THE PATHFINDERS**



Dallas, Texas

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INTRODUCTION

The Pathfinders has employed its experience in workforce assessments for corporate site-selection clients and civilian workforce assessments for the Department of Defense in locations that faced military base closures to produce this evaluation of the Cleveland County area workforce. The information presented in this report has been developed independently of the client, and the client has not influenced the findings.

The Pathfinders functions as a site-selection consultant to many of America's largest corporations, including companies such as AT&T, DuPont, Celanese, 3M Corporation, IMC Global, Singapore Aerospace, AIG, and Ciba-Geigy. The question which most often drives the search for a new business location is whether the candidate location has the workforce needed, and a workforce analysis has been a key component of the site searches conducted for these clients. Senior human resources executives from among corporate clients assisted in refining this methodology and report format. Companies making location decisions based upon these surveys have reported that when staffing actually began, the numbers reported by The Pathfinders proved to be accurate.

In a poll of its corporate clients, The Pathfinders found that those clients' experiences suggest that less than 10% of the new hires for new operations come from the ranks of the unemployed. Instead, these clients and other companies staff a new operation principally with individuals who are working but who desire better jobs and who possess the skills, education, and experience to qualify them for those better jobs. By that definition, those individuals can be considered "underemployed" and are identified as such in this report. The type of quality employer that the Cleveland County region is attempting to attract will typically hire people who come from this group. As a consequence, The Pathfinders was retained to quantify the extent to which underemployment exists in the area, as well as to document the cost, skills, experience, and education of that hidden workforce. This report represents the objective and professional view of The Pathfinders with regard to workforce availability, cost, skills, and quality that a new employer can expect in the Cleveland County region.



SUMMARY OF FINDINGS

- The Cleveland County area, referred to in this report as the “labor shed”, has a population of approximately 337,200.
- This labor shed (see page 3 for definition) has a civilian labor force of approximately 165,000.
- The labor shed has a pool of approximately 12,900 unemployed persons who are actively seeking work.
- A new employer will be able to attract employees from an additional pool of about 27,400 potentially available workers, referred to in this report as the “underemployed”, who have indicated an interest in changing jobs.
- These workers possess the skills, experience, and education to qualify them for the pay rates at which they would take a new job.
- The desired pay rates of these underemployed workers are reasonable when compared to their existing pay rates.
- About 25% of the underemployed workers would take a new job for \$10.57 per hour or less. At the upper end, the 25% most qualified and experienced will command \$19.94 per hour or more.
- The median desired pay rate of the underemployed workers is \$13.78 per hour.
- Roughly 5,900 people, neither employed nor seeking work, might re-enter the workforce for the proper job.



METHODOLOGY

Published government statistics report wages and employment for the entire workforce of an area, even though most of that workforce has no interest in changing jobs. This report, prepared by The Pathfinders, includes data only on those people in the area who might change jobs and who would be potential candidate workers for a new employer. As opposed to average wages, this report quantifies the number of those workers available for an employer in various wage ranges.

The first step in assessing the workforce of the Cleveland County area was to determine the boundaries of the area to be assessed. To accomplish this task, The Pathfinders applied the same reasoning that would be used during a site search for a corporate client considering the area as a potential location. The Cleveland County survey area includes those locations from which workers might be drawn to a new employer and is referred to in this report as the “labor shed”. This labor shed consists of Cleveland, Polk and Rutherford Counties in North Carolina and portions of Gaston, Burke and Lincoln Counties in North Carolina and Cherokee County in South Carolina.

Once the labor shed was identified, a random sample of telephone numbers of qualified respondents in the labor shed was obtained for use in the Computer Assisted Telephone Interviewing or CATI system.

The Pathfinders then conducted telephone interviews with individuals throughout the Cleveland County region. Those individuals were stratified across age (19 - 54 years), gender, household income (up to \$100,000), and zip codes. The purpose of these interviews was to ascertain availability for work with a new employer; determine desired pay rates; and, collect information on such factors as age, education, commuting patterns, experience, and skills. The data obtained as a result of those interviews enabled The Pathfinders to apply and employ a proprietary methodology which accurately determined the existence of underemployment as defined in the introduction.



The Pathfinders applied a proprietary process to the analysis of the data to correct for invalid responses. For example, those persons indicating they would take a new job but also indicating the desire for increased or decreased pay that is unreasonable are not counted in the results.

This process considers that to be counted as underemployed, an individual must be currently employed and willing to take another job at a pay rate commensurate with personal skills, education, and experience.

Current pay alone is not the qualifying factor for underemployment status in this study. Individuals, for example, making \$7.50 per hour, possessing no high school degree or skills, and being in the workforce for less than one year may consider themselves to be underemployed but are not considered to be so in this report. On the other hand, education, skills, and experience may qualify the person making \$22.00 per hour as truly underemployed.

Sufficient interviews were completed with qualified individuals to produce results for that entire population group which vary by no more than plus or minus 5 percentage points. If the survey were repeated 100 times, 95 times out of 100 the results would be the same as those resulting from a survey of every individual in the entire population.

Irrespective of the fact that the methodology employed is scientifically proven to produce such results, it is perhaps even more important to note that companies making location decisions based upon these surveys have reported that when staffing actually began, the numbers reported by The Pathfinders proved to be accurate.



ASSESSMENT OF THE WORKFORCE

The Cleveland County area labor shed has a population of approximately 337,200. The civilian labor force numbers approximately 165,000, and the labor shed contains approximately 12,900 unemployed people who are seeking work.

The results of this assessment determined that approximately 27,400 workers can be defined as underemployed: those individuals who are currently working but would take a better job if offered by a new or existing employer and who possess the skills, education, and experience to qualify them to do so. Further, the results suggest that an additional 5,900 people who are not currently employed or actively seeking work would re-enter the workforce and take a good job if offered. In total, the Cleveland County area has approximately 46,200 available workers for new or existing employers.

AVAILABLE WORKERS

Number of underemployed workers	27,400
Number of unemployed persons who are seeking work	12,900
Number of persons who are not working, but are contemplating re-entering the workforce	5,900
Total Number of Workers Available for Employers	46,200

The reader is cautioned that, while the number of underemployed workers identified in the region, as well as their skills, experience, education, and costs, is accurate, all of those individuals may not be acceptable candidates for an employer. Their previous work records, stability, integrity, intelligence, appearance, and other factors are not considered in this report.



These underemployed workers might also be termed upgraders. They desire to move into an upgraded job and appear to possess the skills, education, and experience to enable them to do so. The pay rates they expect to achieve range from under \$8.00 to over \$30.00 per hour.

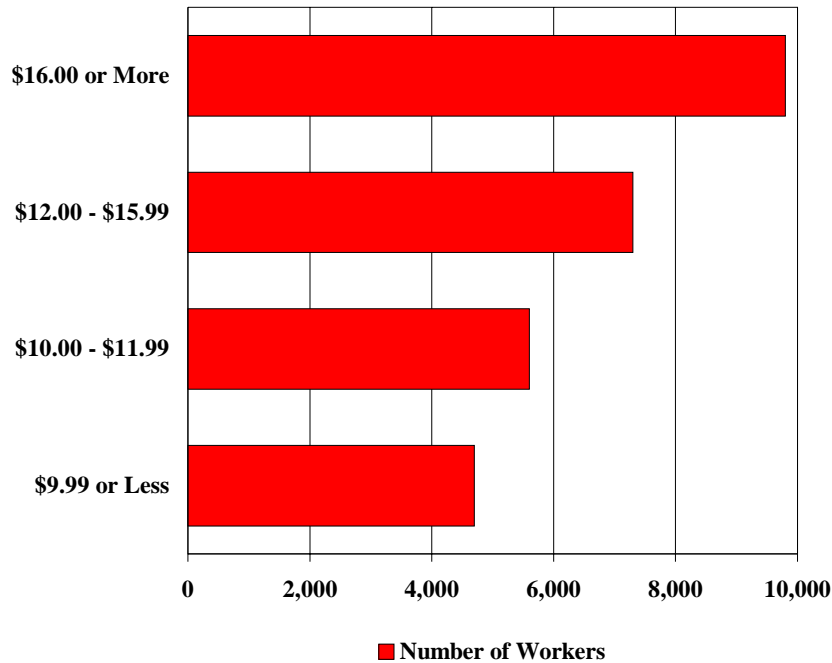
The following data represent the desired pay rates of the underemployed individuals in the labor shed. Many workers expressed their wage requirements in weekly, monthly, or annual terms, but all wage figures in this report are presented in hourly rates. Selected conversions may add perspective to the hourly rates. Figures presented below are rounded and based on a 40-hour work week.

CONVERSION CHART

Hourly	Weekly	Monthly	Annually
\$ 8.00	\$ 320.00	\$ 1,386.00	\$ 16,640.00
\$ 10.00	\$ 400.00	\$ 1,733.00	\$ 20,800.00
\$ 12.00	\$ 480.00	\$ 2,078.00	\$ 24,960.00
\$ 14.00	\$ 560.00	\$ 2,425.00	\$ 29,120.00
\$ 16.00	\$ 640.00	\$ 2,771.00	\$ 33,280.00
\$ 18.00	\$ 720.00	\$ 3,118.00	\$ 37,440.00
\$ 20.00	\$ 800.00	\$ 3,464.00	\$ 41,600.00
\$ 22.00	\$ 880.00	\$ 3,810.00	\$ 45,760.00
\$ 24.00	\$ 960.00	\$ 4,157.00	\$ 49,920.00
\$ 26.00	\$ 1,040.00	\$ 4,503.00	\$ 54,080.00
\$ 28.00	\$ 1,120.00	\$ 4,850.00	\$ 58,240.00
\$ 30.00	\$ 1,200.00	\$ 5,196.00	\$ 62,400.00



DESIRED WAGE RATES PER HOUR BY RANGE
27,400 Underemployed Workers



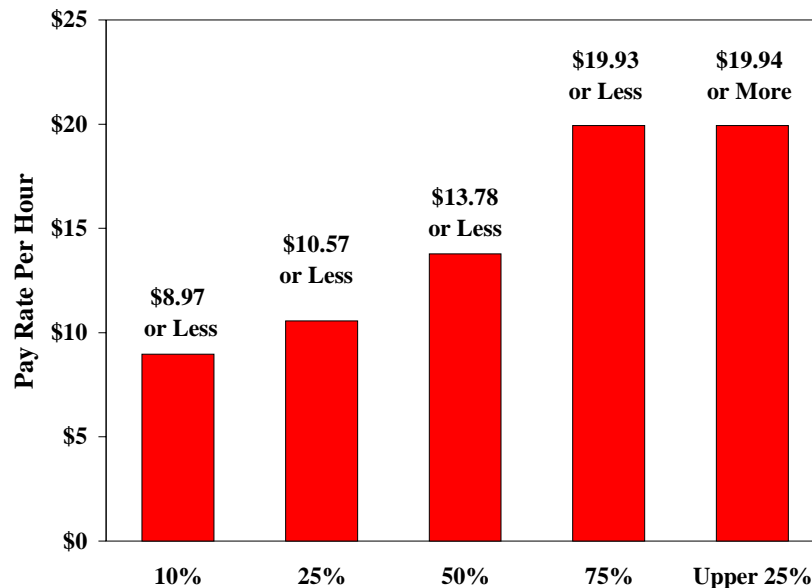
NUMBER OF UNDEREMPLOYED WORKERS AVAILABLE
AT SPECIFIC WAGE RATES PER HOUR (rounded)

<u>\$7.99 or Less</u> 1,000	<u>\$8.00 - \$8.99</u> 1,800	<u>\$9.00 - \$9.99</u> 1,900	<u>\$10.00 - \$10.99</u> 3,800	<u>\$11.00 - \$11.99</u> 1,800
<u>\$12.00 - \$12.99</u> 2,700	<u>\$13.00 - \$13.99</u> 900	<u>\$14.00 - \$14.99</u> 1,900	<u>\$15.00 - \$15.99</u> 1,800	<u>\$16.00 - \$16.99</u> 700
<u>\$17.00 - \$17.99</u> 900	<u>\$18.00 - \$18.99</u> 700	<u>\$19.00 - \$19.99</u> 700	<u>\$20.00 - \$20.99</u> 1,500	<u>\$21.00 - \$21.99</u> 400
<u>\$22.00 - \$22.99</u> 700	<u>\$23.00 - \$23.99</u> 200	<u>\$24.00 - \$24.99</u> 400	<u>\$25.00 - \$25.99</u> 900	<u>\$26.00 - \$26.99</u> 400
<u>\$27.00 - \$27.99</u> 100	<u>\$28.00 - \$28.99</u> 400	<u>\$29.00 - \$29.99</u> 200	<u>\$30.00 - \$ 30.99</u> 500	<u>\$31.00 or More</u> 1,100



Utilizing the desired wage information as illustrated in the preceding charts, the following conclusions can be drawn concerning the underemployed workers in the Cleveland County area:

- 10% of the underemployed workers will require \$8.97 per hour or less to change jobs.
- 25% of the underemployed workers will require \$10.57 per hour or less to change jobs.
- 50% of the underemployed workers will require \$13.78 per hour or less to change jobs.
- 75% of the underemployed workers will require \$19.93 per hour or less to change jobs.
- The upper 25% of the underemployed workers will require wages beginning at \$19.94 per hour and extending upward to over \$30.00 per hour. These are the most qualified and experienced workers.

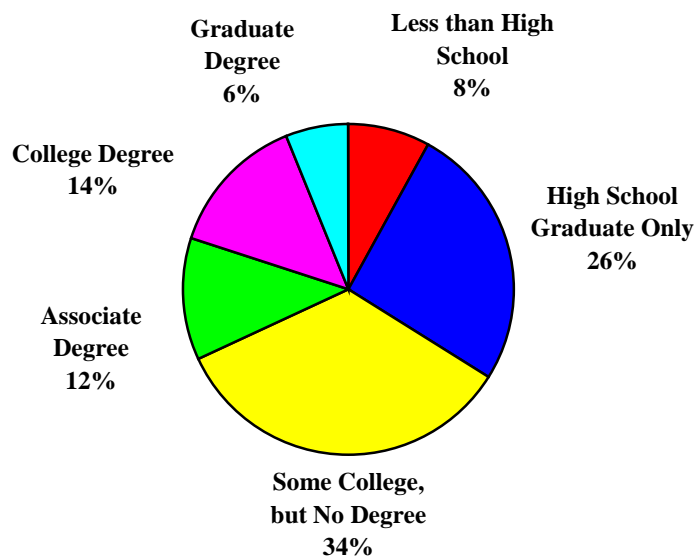


CHARACTERISTICS OF UNDEREMPLOYED WORKERS

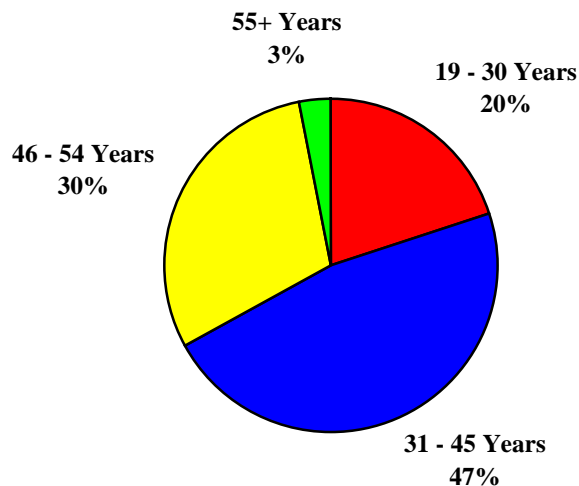
The Cleveland County Area Labor Shed

The following charts provide information on various characteristics of the underemployed workers in the labor shed. As these data relate solely to those individuals in the labor shed who are underemployed, they will vary from data representative of the population as a whole.

EDUCATION



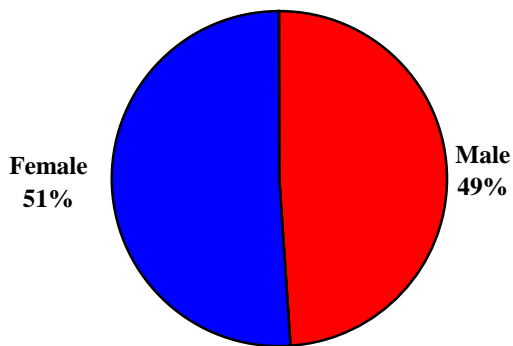
AGE



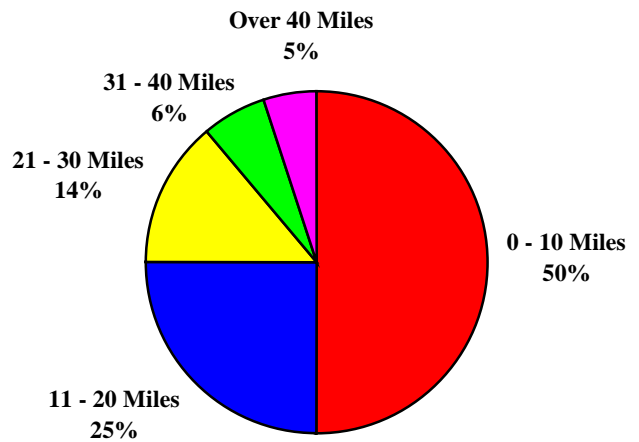
UNDEREMPLOYED WORKERS – LENGTH OF TIME IN CURRENT JOB



GENDER



COMMUTING DISTANCES



EXPERIENCE AND SKILLS

The experience and skills categories used in this report are designed to provide accurate workforce data for employers which fall into one or more of the following four broad groups:

- manufacturing, assembly, fabrication or other industrial operations;
- office, data processing, call centers, or other operations which might be “white collar” in nature;
- distribution or transportation operations; and,
- operations related to sales or customer service and other public interface.

The experience and skills categories are purposefully similar in order to present the most accurate worker availability for operations in one of those four groups.

An employee in the front office of a manufacturing operation will be considered to have “manufacturing” experience but may only have “office” skills. Someone with “industrial experience” may not have “industrial machines” skills, but could have “materials handling” skills if they work in shipping or receiving. “Sales” and “customer service” experience cross many other experience and skills categories and ideally would be possessed by anyone with customer contact to any degree.

The similarities between the skills and experience categories are designed to ensure inclusiveness considering the multitude of tasks and job titles present in most business, government and institutional operations. Additionally, what may appear to some observers as redundancy is, in reality, a proven mechanism to cross-check the validity of responses and to identify the degree to which workplace and professional competencies are truly transferable to new positions and employers.



EMPLOYMENT EXPERIENCE OF UNDEREMPLOYED WORKERS**The Cleveland County Area Labor Shed (rounded)**

Experience*	Number of Persons	Percentage
Office/Data/Word Processing	13,200	48%
Warehouse/Distribution/Transportation	14,000	51%
Manufacturing/Assembly	18,900	69%
Industrial Operations	13,400	49%
Call Center	5,200	19%
Government/Education	6,300	23%
Sales	14,000	51%
Customer Service	15,600	57%

EMPLOYMENT SKILLS OF UNDEREMPLOYED WORKERS**The Cleveland County Area Labor Shed (rounded)**

Skills*	Number of Persons	Percentage
Office/Data/Word Processing	14,500	53%
Warehouse/Materials Handling	14,800	54%
Manufacturing/Assembly/Fabrication	17,300	63%
Machining/Welding/Other Industrial Machines	10,100	37%
Telecommunications	4,100	15%
Technician/Quality Assurance	9,600	35%
Maintenance	9,600	35%
Electronics/Engineering	4,700	17%

* Individuals polled may have experience and skills in more than one job classification.



UNDEREMPLOYED WORKERS INTEREST IN TRAINING COURSES

A component was added to this survey which was designed to determine possible interest in training courses on the part of the underemployed individuals in the workforce. The primary purpose of including this component was to produce data which would provide guidance in the establishment of training programs which will more precisely meet the needs of the public and the business community in the Cleveland County area.

The extent to which interest is strong and those individuals might actually enroll in a training program is not known. However, this survey presents the relative interest in the six training course options which received sufficient positive responses so as to be meaningful. As indicated below, more than half of the underemployed workers in the Cleveland County region expressed interest in communications skills training and supervisory training. The greatest percentage of interest (64%) was in computer courses.

UNDEREMPLOYED WORKERS INDICATING INTEREST IN TRAINING COURSES

Type of Training Course	Number of Persons	Percentage
Computer Courses	17,500	64%
Communications Skills/Supervisory Training	16,200	59%
Office Skills	12,100	44%
Basic Electrical/Electronics Courses	10,400	38%
Maintenance/Mechanical Courses	9,300	34%
Industrial Machine Operations	7,400	27%



The data collected on the underemployed workers who indicated an interest in training courses was further analyzed to provide additional insight into these workers. The information was cross-tabulated by gender, age, education and current pay, and the following observations were made:

In the Cleveland County region,

- Male underemployed workers have the greatest interest in maintenance and/or mechanical courses, followed by industrial machine operations courses and basic electrical and/or electronics courses.
- Female underemployed workers have the greatest interest in office skills training, communications skills and/or supervisory training, and computer courses.
- With respect to the age of the underemployed workers interested in training courses, in each of the six course options, the highest percent of interest came from those in the 31 – 45 years old category.
- The highest percent of interest by education occurs in those underemployed workers who are high school graduates only and also those who have attended college but not received a degree.
- Those underemployed workers who are currently earning between \$10 and \$15 per hour indicated the most interest in each of the six training course options, followed by those in the Under-\$10 per hour category.



As previously stated, the results of this workforce assessment suggest that an additional 5,900 people, who are not currently employed or actively seeking work, would re-enter the workforce and take a good job if offered. This group is approximately 70% female and is three years older on average than the underemployed. The education of this additional group roughly mirrors that of the underemployed members of the workforce, albeit with a somewhat higher concentration of “Some College, but No Degree”. This group exhibits comparable measures of experience and skills to those of the underemployed in the following areas:

- sales
- telecommunications

The pay rates required by this group to re-enter the workforce fall across a broad spectrum of pay rates. The lower quartile would take \$8.28 or less, and the upper quartile desires \$16.29 per hour or more.

The training interests of this segment of the population are as follows:

Type of Training Course	Number of Persons	Percentage
Communications Skills/Supervisory Training	2,800	48%
Computer Courses	2,600	44%
Office Skills	2,500	42%
Industrial Machine Operations	1,600	27%
Maintenance/Mechanical Courses	1,200	21%
Basic Electrical/Electronics Courses	1,200	21%

The determinations for this group have a larger statistical variance than that for the underemployed.

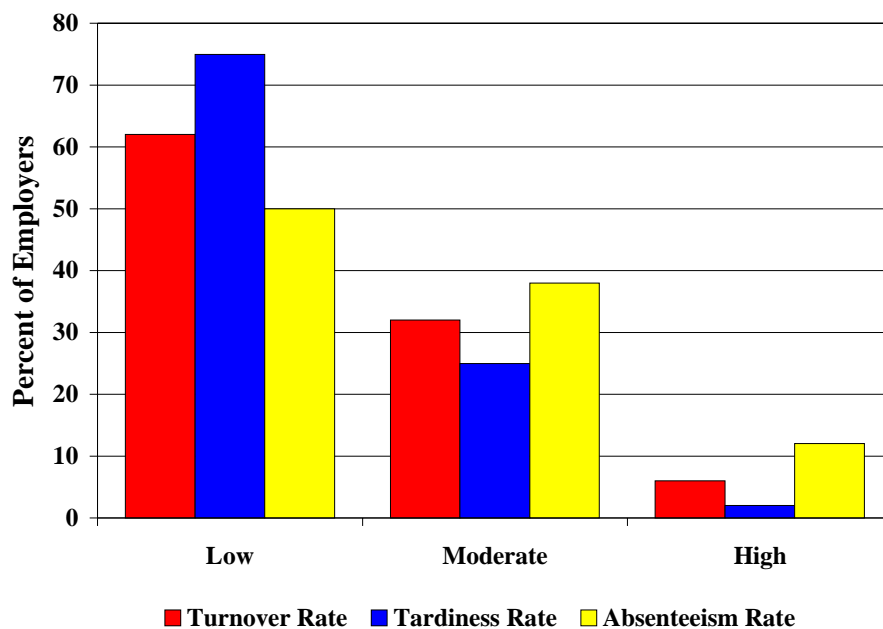


Employers interviewed were asked to provide subjective views of their workers, in addition to objective and quantitative measurements of labor productivity, availability, attitudes, and costs.

Additionally, employers with operations in other regions of the United States were asked to compare their experiences in those other areas with their experiences in the Region C area. Most of the companies interviewed stated that their local operations were comparable to or better than the operations in other locations in terms of profitability and production. This is indicative not only of good management but also of a productive workforce.

Based upon the experience of The Pathfinders in evaluating labor forces in numerous locations, a definite correlation between productivity, absenteeism, tardiness, and turnover appears to exist. That correlation goes beyond the fact that an absent worker is obviously unproductive. Rather, those factors are indicative of an employee’s attitude toward the job. The chart below shows the percent of employers rating for turnover, tardiness and absenteeism in the Region C area.

**PERCENT OF EMPLOYERS RATING
THE REGION C AREA TOTAL WORKFORCE**



Also included in this correlation is the degree of substance abuse found in the workforce. In the Region C area, substance abuse was reported as very low. Further, 81% of the employers interviewed stated their companies tested for substance abuse, primarily pre-employment, random and post-accident.

In consideration of all factors, 88% of the employers in the Region C area rated the productivity of the workforce as “Good” to “Excellent”. Worker reliability and attitudes received high marks as well from 81% of the employers.

**PERCENT OF EMPLOYERS RATING
THE REGION C AREA TOTAL WORKFORCE**

Category	Excellent	Good	Fair	Poor
Worker Productivity	38%	50%	12%	0%
Worker Reliability and Attitudes	25%	56%	19%	0%

The educational competencies of employees are additional factors used to evaluate an area’s labor force. In general, the Region C area employers rated the local educational providers as “Good” and gave the following ratings to their employees relative to competency in reading, writing, and calculations.

**PERCENT OF EMPLOYERS RATING
THE REGION C AREA TOTAL WORKFORCE**

Category	Excellent	Good	Fair	Poor
Reading/Writing Competency	6%	38%	56%	0%
Calculations Competency	6%	32%	62%	0%



Employers were asked to give their opinions concerning any specific skills they felt were needed in the workforce and any training programs that would be beneficial. The charts below present the findings. As indicated, over half the employers interviewed (56%) stated that basic reading and math skills were the skills most needed by workers in the Region C area.

SKILLS NEEDED **% OF EMPLOYERS**

Reading and Writing Skills	56%
Work Ethic/Values	44%
Communication Skills	25%
Computer Skills	13%

With regard to training, the employers interviewed overwhelmingly gave the Isothermal Community College especially high praise for meeting their training needs. Also, the Isothermal Planning and Development Commission was highly commended for its programs.

TRAINING NEEDS **% OF EMPLOYERS**

Specialized Skills	38%
Job Ethic Skills	25%
Reading and Writing Skills	13%
Computer Skills	6%



A common employer complaint relates to the shortage of skilled and technical workers. The availability of these workers in the Region C area must be viewed from the perspective of comparative availability when other areas of the state and nation are considered. Skilled and technical workers are in great demand and difficult to find in the vast majority of locations. Of the companies in the labor shed interviewed, 42% considered skilled worker availability to be “Excellent” or “Good”, while 39% considered it to be “Fair”. The availability of technical workers in the labor shed was rated “Excellent” or “Good” by 38% of the interviewed companies and “Fair” by 62%.

The following table provides a composite portrait of employers’ experiences with and opinions of workers in the Region C area. Taken in context with the data gathered and presented in the workforce survey, a balanced profile of the attributes of individuals available to fill the labor needs of new and expanding firms is provided.

PERCENT OF EMPLOYERS RATING THE REGION C AREA TOTAL WORKFORCE

Category	Excellent	Good	Fair	Poor
Availability of Skilled Workers	5%	37%	39%	19%
Availability of Unskilled Workers	25%	37%	32%	6%
Availability of Professional Workers	6%	32%	50%	12%
Availability of Technical Workers	6%	32%	62%	0%
Worker Productivity	38%	50%	12%	0%
Worker Reliability and Attitudes	25%	56%	19%	0%
Reading/Writing Competency	6%	38%	56%	0%
Calculations Competency	6%	32%	62%	0%



COMPARISONS OF EMPLOYERS RATINGS

TOTAL WORKFORCE

The Region C Area Labor Shed /

Locations Previously Surveyed

In the course of workforce surveys, local employers are asked to rate their workers on a number of factors. Those factors include: worker productivity; worker reliability and attitudes; reading/writing competency; calculations competency; availability of skilled workers; availability of unskilled workers; availability of technical workers; and, availability of professional workers. Local employers are asked to rate each factor either “Excellent”, “Good”, “Fair”, or “Poor”.

The purpose of these interviews and ratings is not only to determine how local employers rate their workers but also to provide a means for comparing local ratings to those of all locations surveyed during the past eighteen months. Such comparison will enable you to assess your employers’ ratings of their workers in contrast to the body of thousands of employer ratings recorded in that period.

The following charts present the comparative results for each factor. They compare the percentages of the Region C area employers who rated their workers “Excellent”, “Good”, “Fair”, or “Poor” on each factor with the “Highest” rating of that factor in all areas surveyed in the last eighteen months and the “Median” rating for that factor in all areas surveyed during that time. As a result, the “Highest” and “Median” ratings do not add to 100%.

For example, 38% of the Region C area employers rated “Worker Productivity” as “Excellent”. Of all the locations surveyed during the last eighteen months, the “Median” for that rating is 21%, and the “Highest” rating recorded in the “Excellent” category is 67%. The same comparison applies for each of the other factors.

In these charts, the Region C area is shown as “Labor Shed”.



WORKER PRODUCTIVITY

Excellent		Good		Fair		Poor	
Highest	67%	Highest	83%	Highest	37%	Highest	10%
Labor Shed	38%	Labor Shed	50%	Labor Shed	12%	Labor Shed	0%
Median	21%	Median	60%	Median	15%	Median	5%

WORKER RELIABILITY AND ATTITUDES

Excellent		Good		Fair		Poor	
Highest	57%	Highest	83%	Highest	43%	Highest	15%
Labor Shed	25%	Labor Shed	56%	Labor Shed	19%	Labor Shed	0%
Median	21%	Median	56%	Median	20%	Median	6%

READING/WRITING COMPETENCY

Excellent		Good		Fair		Poor	
Highest	44%	Highest	87%	Highest	57%	Highest	21%
Labor Shed	6%	Labor Shed	38%	Labor Shed	56%	Labor Shed	0%
Median	14%	Median	53%	Median	29%	Median	8%

CALCULATIONS COMPETENCY

Excellent		Good		Fair		Poor	
Highest	38%	Highest	80%	Highest	57%	Highest	30%
Labor Shed	6%	Labor Shed	32%	Labor Shed	62%	Labor Shed	0%
Median	12%	Median	51%	Median	33%	Median	13%



AVAILABILITY OF SKILLED WORKERS

Excellent		Good		Fair		Poor	
Highest	50%	Highest	79%	Highest	53%	Highest	34%
Labor Shed	5%	Labor Shed	37%	Labor Shed	39%	Labor Shed	19%
Median	7%	Median	45%	Median	34%	Median	15%

AVAILABILITY OF UNSKILLED WORKERS

Excellent		Good		Fair		Poor	
Highest	66%	Highest	80%	Highest	50%	Highest	14%
Labor Shed	25%	Labor Shed	37%	Labor Shed	32%	Labor Shed	6%
Median	24%	Median	52%	Median	20%	Median	7%

AVAILABILITY OF PROFESSIONAL WORKERS

Excellent		Good		Fair		Poor	
Highest	33%	Highest	78%	Highest	61%	Highest	46%
Labor Shed	6%	Labor Shed	32%	Labor Shed	50%	Labor Shed	12%
Median	6%	Median	43%	Median	36%	Median	15%

AVAILABILITY OF TECHNICAL WORKERS

Excellent		Good		Fair		Poor	
Highest	33%	Highest	79%	Highest	58%	Highest	57%
Labor Shed	6%	Labor Shed	32%	Labor Shed	62%	Labor Shed	0%
Median	7%	Median	40%	Median	42%	Median	18%



NATIONAL COMPARATIVE OBSERVATIONS

As a matter of course in site-selection projects, The Pathfinders evaluates published government workforce statistics. Those statistics, however, depict the entire workforce while only a minority segment of those workers will be considered for or have an interest in new jobs with a company. The characteristics of the select, underemployed workforce group represented in this report may vary significantly from the workforce as a whole as reported in published government data.

Accordingly, the information presented in the workforce report for the Cleveland County region covers those members of the workforce who are, by virtue of their underemployment, potential candidates for new jobs. Existing employers, or new employers recruited to the Cleveland County region, typically will not depend heavily on the unemployed to staff a new operation or to fill vacancies in existing operations caused by turnover or expansions. Companies look to the ranks of people who are already employed but are seeking to better themselves. Those individuals in that category who possess the education, skills, and experience to merit a better job are classified as UNDEREMPLOYED.

The workforce report issued by The Pathfinders documents the availability of underemployed workers as well as the skills, experience, education, and costs of individuals in that hidden workforce in the Cleveland County region. This section of the report provides a comparison of the characteristics of the labor shed's underemployed workforce with the underemployed workforces in other communities previously surveyed throughout the nation. A prospect company considering the Cleveland County region as a location will judge its workforce on a comparative basis. This section of the report will allow local economic development professionals to view the region's workforce in relation to others across the country.

The comparative data for other locations used in the following charts and tables reflect information accumulated over the past eighteen months. The Pathfinders maintains a continuing database of over 600 surveyed counties and communities and more than 30 million workers.



Locations Used In Comparative Analysis

In the various charts which follow this page, this labor shed is compared with others for the purpose of making the data meaningful. In the charts, figures for this labor shed are shown alongside the “lowest”, “median” and “highest” figures from other workforce surveys conducted by The Pathfinders. The comparisons are with communities and counties representing both larger and smaller and those similar in size to this labor shed. They are also scattered throughout the nation, and a partial listing of locations from which the “low”, “median” and “high” data reported are derived includes:

Albany, NY	Culpeper Co., VA	Lee’s Summit, MO	Richmond, KY
Amarillo, TX	Dallas, TX	Lexington, KY	Rutherford Co., TN
Anderson, IN	Danville, IL	Long Island, NY	Salisbury, MD
Ardmore, OK	Daytona Beach, FL	Louisville, KY	San Angelo, TX
Atascadero, CA	Decatur, AL	Kokomo, IN	San Marcos, TX
Atlanta, GA	Evansville, IN	Eastern Shore, MD	Scranton, PA
Auburn, AL	Fauquier Co., VA	Marion County, KY	Seguin, TX
Baldwin Co., AL	Frankfort, KY	Moberly, MO	Seneca Co., NY
Bay Co., FL	Gillette, WY	Mobile, AL	Shasta Co., CA
Bedford, TX	Grays Harbor, WA	Mohawk Valley, NY	Shelby Co., AL
Bentonville, AR	Greene Co., NY	Montgomery, AL	Shoals, AL
Binghamton, NY	Haskell, TX	Monroe, LA	Shreveport, LA
Birmingham, AL	Hazleton, PA	Morehouse Parish, LA	Sikeston, MO
Bowie, TX	Henderson, KY	Muncie, IN	Spokane, WA
Bryan, TX	Hendricks, IN	New Braunfels, TX	Springfield, IL
Buffalo, NY	Hernando Co., FL	New York City, NY	Syracuse, NY
Bullitt Co., KY	Hudson Valley, NY	Nicholasville, KY	Tallahassee, FL
Cambridge, MD	Huntsville, AL	Ontario Co., NY	Talledega, AL
Campbellsville, KY	Hurst, TX	Paducah, KY	Terre Haute, IN
Cape Girardeau, MO	Indianapolis, IN	Pampa, TX	Tioga Co., NY
Chattanooga, TN	Independence, MO	Panama City, FL	Tipton Co., IN
Cheyenne, WY	Jackson Co., MO	Pensacola, FL	Tuscaloosa, AL
College Station, TX	Lake Havasu, AZ	Prescott Valley, AZ	Tucson, AZ
Conroe, TX	LaSalle, IL	Reno, NV	Vermillion Co., IN
Corpus Christi, TX	Lea Co., NM	Richland Parish, LA	Warren Co., NY



The workforce report documented the number of underemployed workers in the labor shed who would be available for an employer at various pay rates ranging from \$8.00 per hour or below to \$30.00 per hour or above and who have the skills, experience, and education to justify the desired pay rates. The table below shows that 25% (lower quartile) of the underemployed workers in the labor shed merit and would take a new job for \$10.57 per hour or less. In locations surveyed over the past eighteen months, the lowest desired pay rate in the lower quartile of underemployed workers was \$8.94 per hour or less, the median \$10.52 or less, and the highest desired pay rate was \$14.75 per hour or less.

**DESIRED WAGES (per hour) – LOWER QUARTILE
UNDEREMPLOYED WORKERS**

Desired Wage Labor Shed	Lowest Desired Wage Locations Surveyed Past 18 Months	Median Desired Wage Locations Surveyed Past 18 Months	Highest Desired Wage Locations Surveyed Past 18 Months
\$10.57 or Less	\$8.94 or Less	\$10.52 or Less	\$14.75 or Less

Those underemployed workers in the upper quartile have more education, better skills, and greater experience. Yet based on current pay rates, they are considered to be underemployed. In the labor shed, the underemployed individuals in the upper 25% can command \$19.94 per hour or more. In locations surveyed over the past eighteen months, the lowest desired pay rate in the upper quartile of underemployed workers was \$15.75 or more, the median \$19.57 or more, and the highest was \$25.07 per hour or more.

**DESIRED WAGES (per hour) – UPPER QUARTILE
UNDEREMPLOYED WORKERS**

Desired Wage Labor Shed	Lowest Desired Wage Locations Surveyed Past 18 Months	Median Desired Wage Locations Surveyed Past 18 Months	Highest Desired Wage Locations Surveyed Past 18 Months
\$19.94 or More	\$15.75 or More	\$19.57 or More	\$25.07 or More



The following charts compare the percentages of underemployed workers in the Cleveland County region who have experience in various fields of employment with the percentages of underemployed workers in locations surveyed over the past eighteen months who have the same type of experience. In the charts, the Cleveland County region is referred to as “labor shed”.

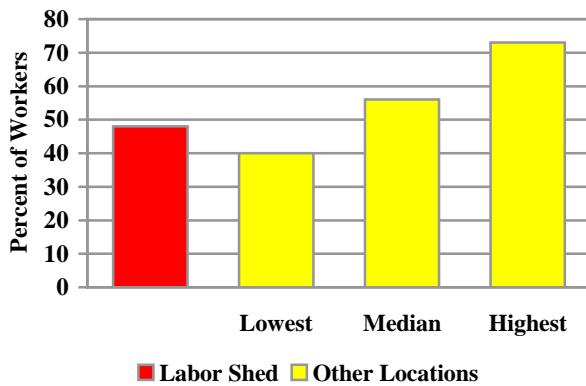
The experience charts are followed by skills charts, which compare the percentages of underemployed workers in the Cleveland County region who possess various types of employment skills with the percentages of underemployed workers in locations surveyed over the past eighteen months who possess the same skills. In the charts, the Cleveland County region is referred to as “labor shed”.



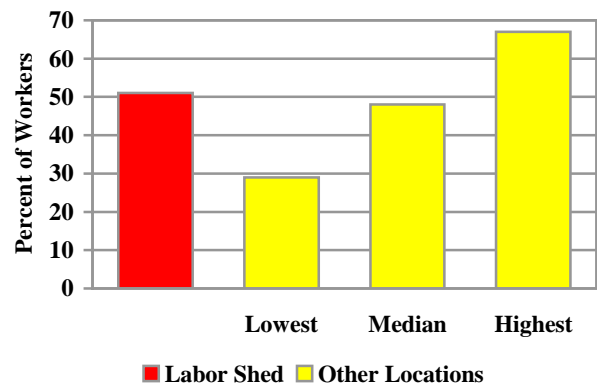
COMPARISON OF EXPERIENCE UNDEREMPLOYED WORKERS

The Cleveland County Area / Locations Surveyed Over the Past 18 Months

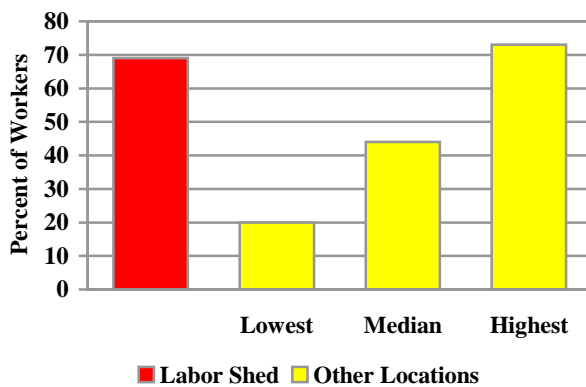
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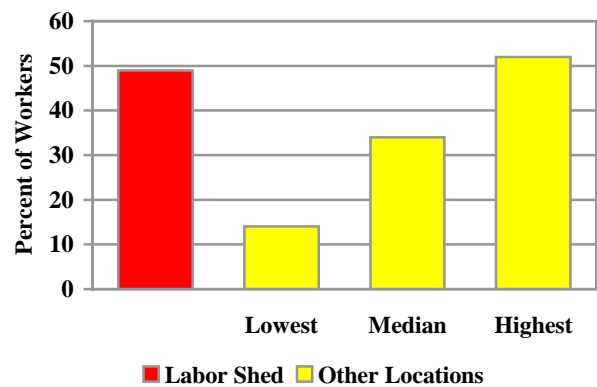
WAREHOUSE / DISTRIBUTION / TRANSPORTATION



MANUFACTURING / ASSEMBLY



INDUSTRIAL OPERATIONS



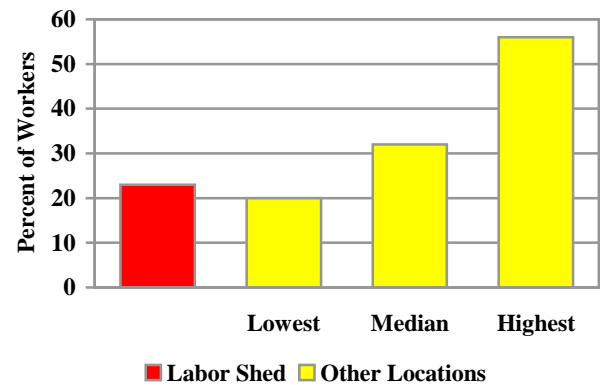
COMPARISON OF EXPERIENCE UNDEREMPLOYED WORKERS

**The Cleveland County Area /
Locations Surveyed Over the Past 18 Months**

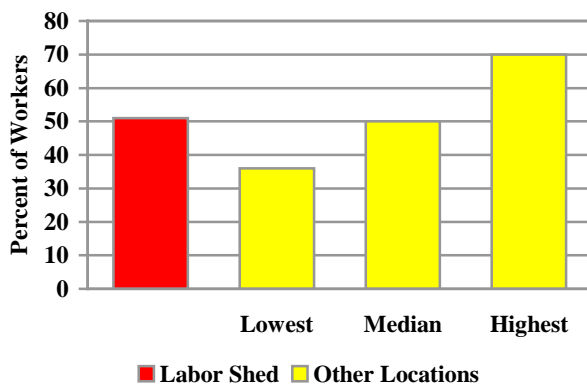
CALL CENTER



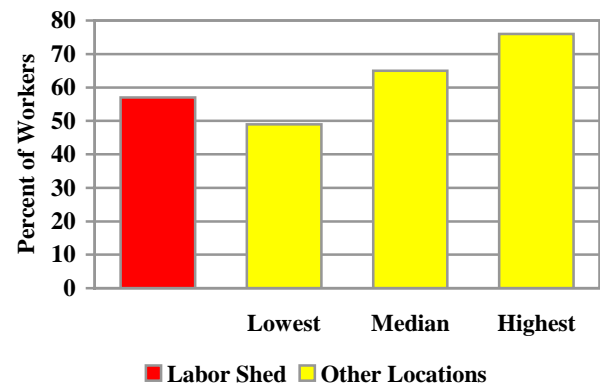
GOVERNMENT / EDUCATION



SALES

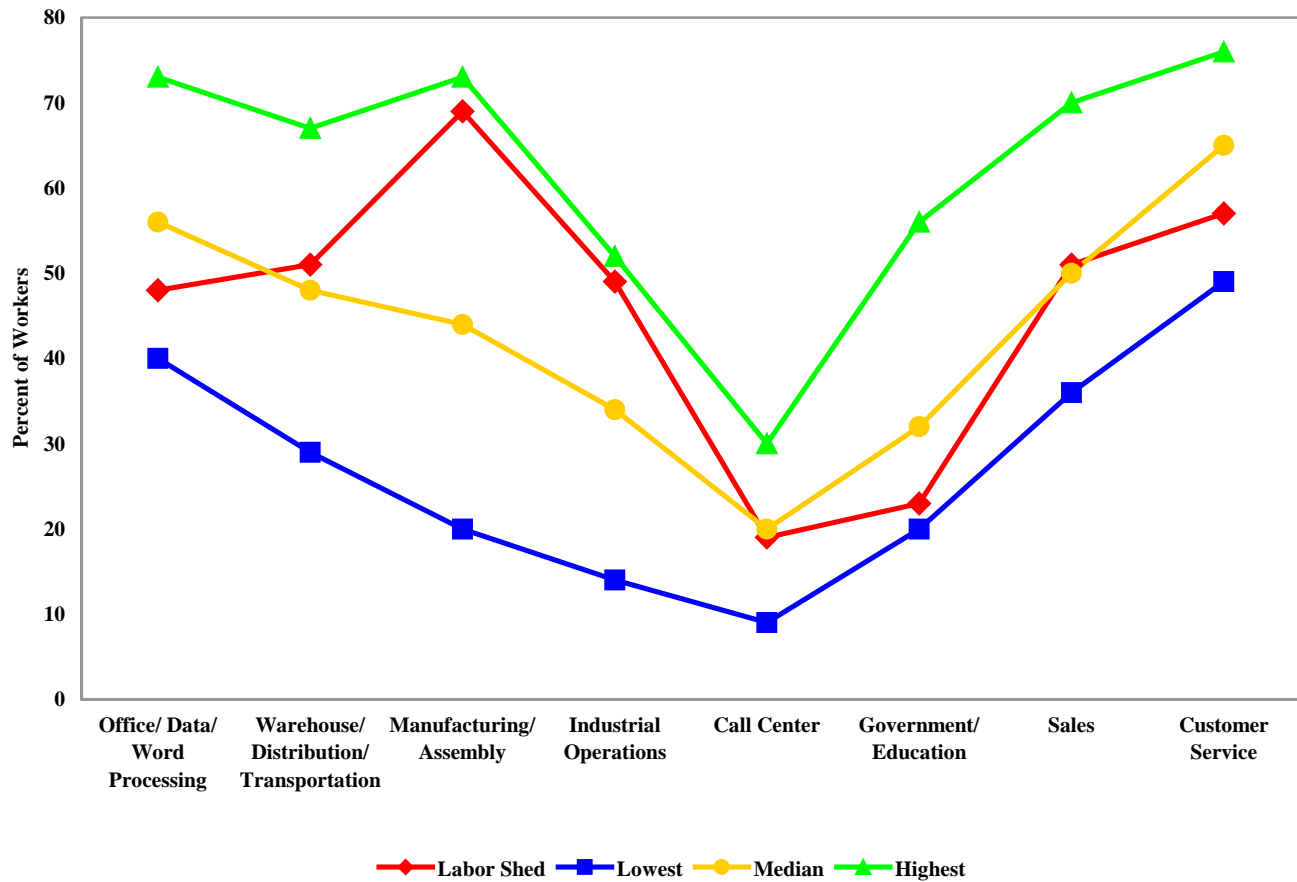


CUSTOMER SERVICE



**SUMMARY COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS**

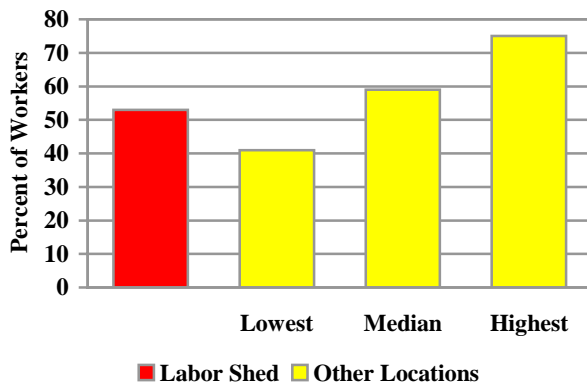
**The Cleveland County Area /
Locations Surveyed Over the Past 18 Months**



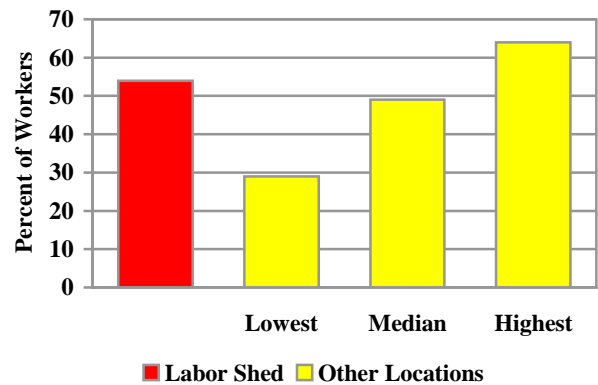
COMPARISON OF SKILLS UNDEREMPLOYED WORKERS

**The Cleveland County Area /
Locations Surveyed Over the Past 18 Months**

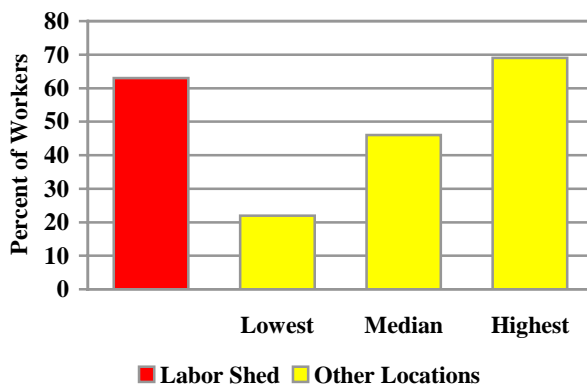
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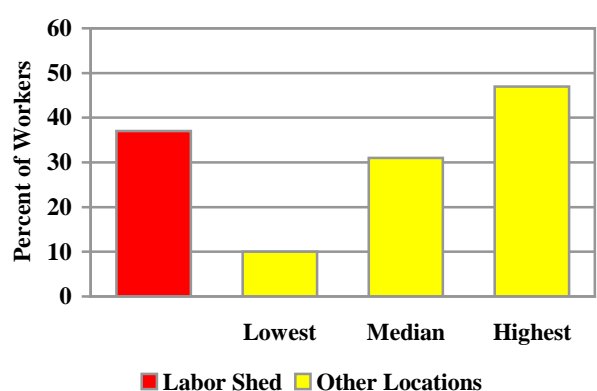
WAREHOUSE / MATERIALS HANDLING



MANUFACTURING / ASSEMBLY / FABRICATION



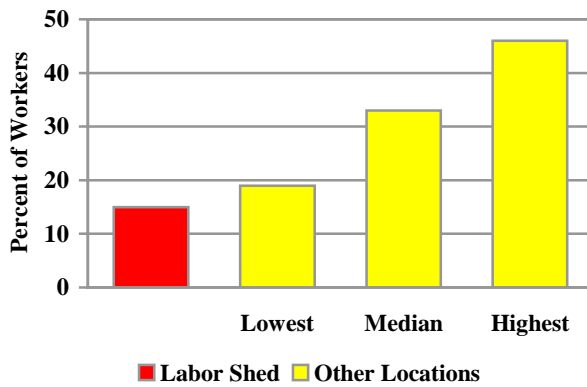
MACHINING / WELDING / OTHER INDUSTRIAL MACHINES



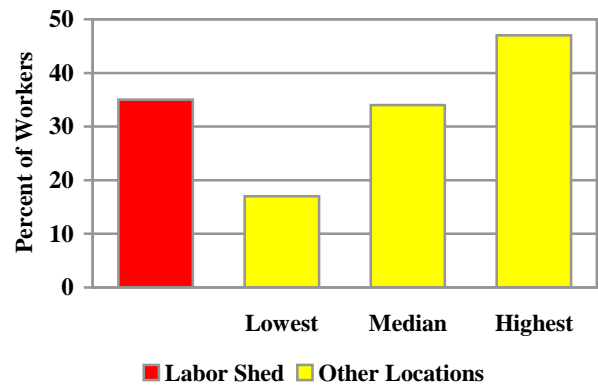
COMPARISON OF SKILLS UNDEREMPLOYED WORKERS

The Cleveland County Area / Locations Surveyed Over the Past 18 Months

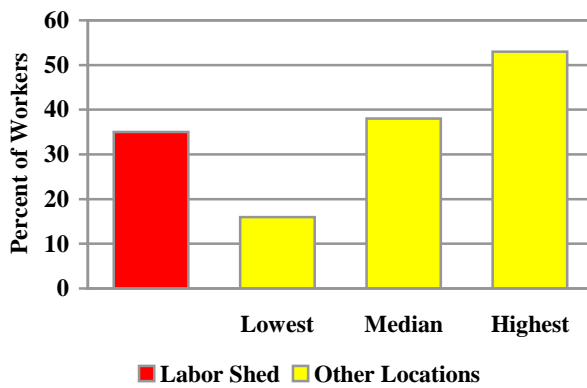
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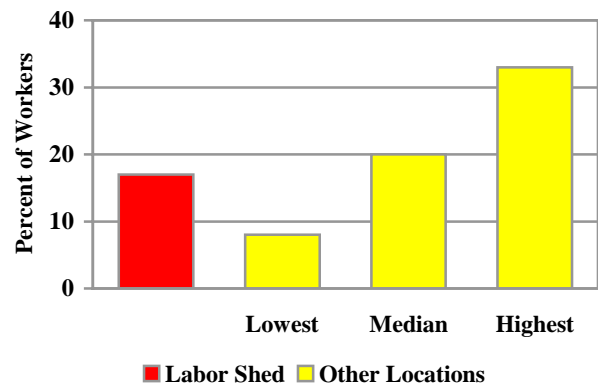
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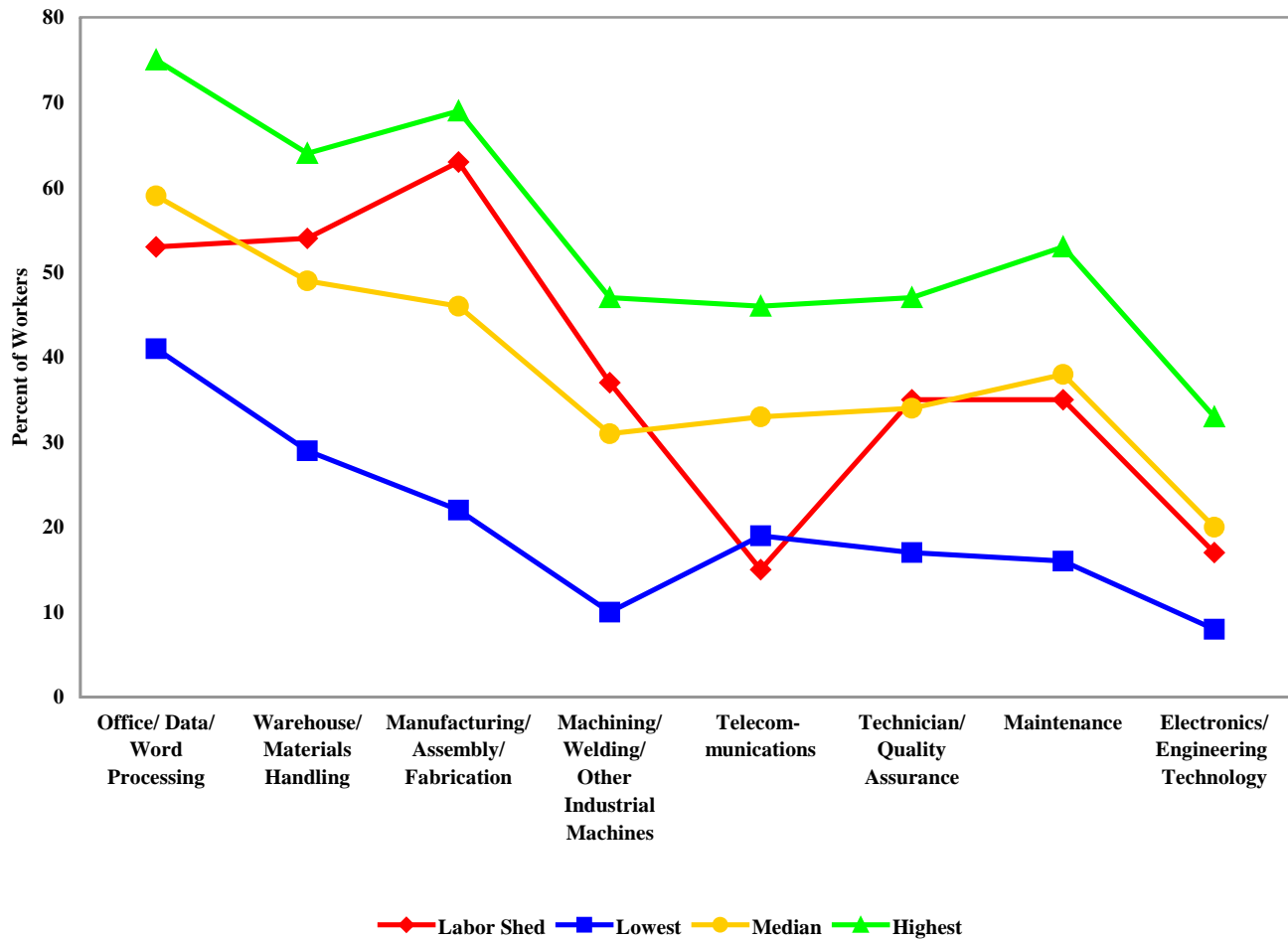
MAINTENANCE



ELECTRONICS / ENGINEERING TECHNOLOGY



**SUMMARY COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The Cleveland County Area /
Locations Surveyed Over the Past 18 Months**



CLOSING REMARKS

The foregoing report represents an assessment of the underemployment that exists in the Cleveland County region. It includes a set of important interlocking measurements of the number of underemployed workers, their cost, skills, experience, education, reliability, productivity, and other related factors. The information allows the economic development professional and the site-selection team to view the area in comparison to other locations.

Attention should be given to the “Employers’ Views of the Region C Area Total Workforce” section of this report in which local employers’ views of the characteristics of local workers are compared with employers’ views in other locations where the identical questions have been asked in identical fashion.

Similarly, attention should be given to the final section of this report, “National Comparative Observations”, which compares the costs, experience, and skills of local underemployed workers with those underemployed workers in locations surveyed by The Pathfinders over the past eighteen months.

While the number of underemployed workers in the Cleveland County region, including their cost, skills, and experience, is the focus of this report, the data should be interpreted in a comparative perspective just as the corporate site selector will in deciding among competing locations.

For Informational Purposes:

The Cleveland County Area Civilian Workforce.....	165,000
Largest Workforce Surveyed by The Pathfinders	3,452,000
Median Workforce Surveyed by The Pathfinders	135,650
Smallest Workforce Surveyed by The Pathfinders.....	3,350
Number of Locations Surveyed by The Pathfinders.....	280





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