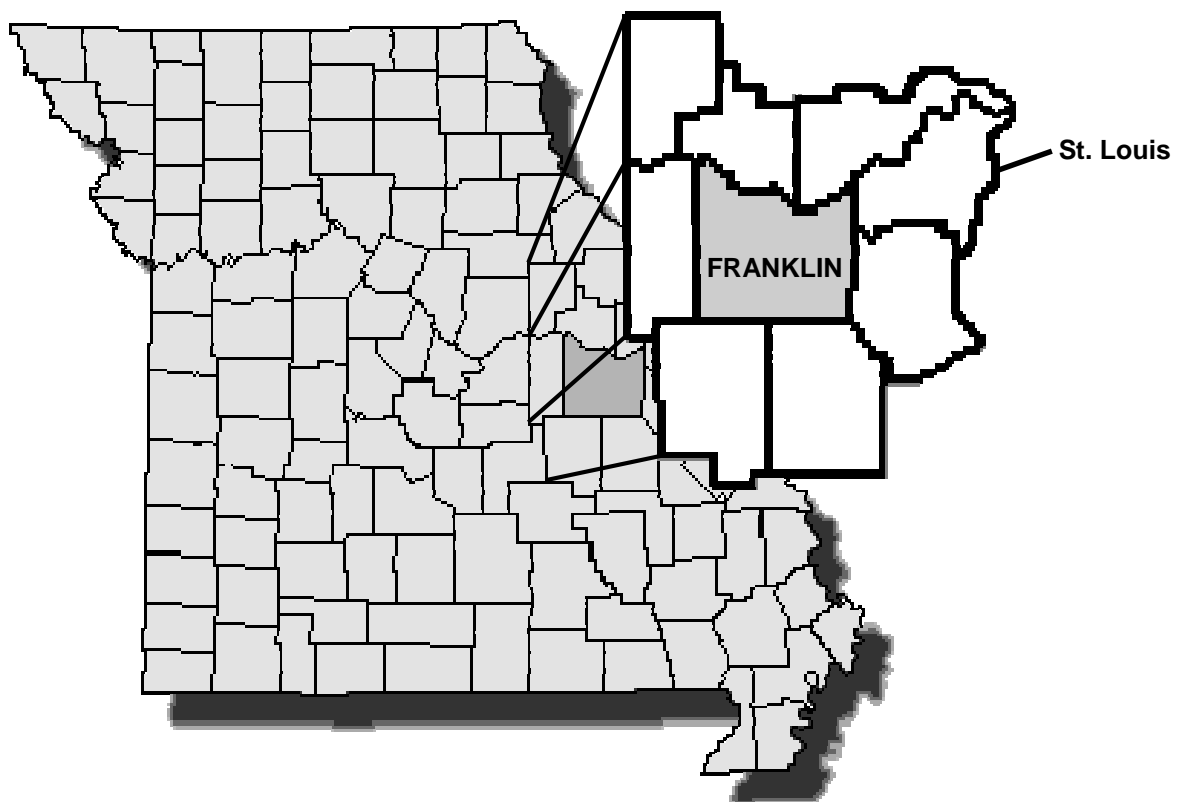


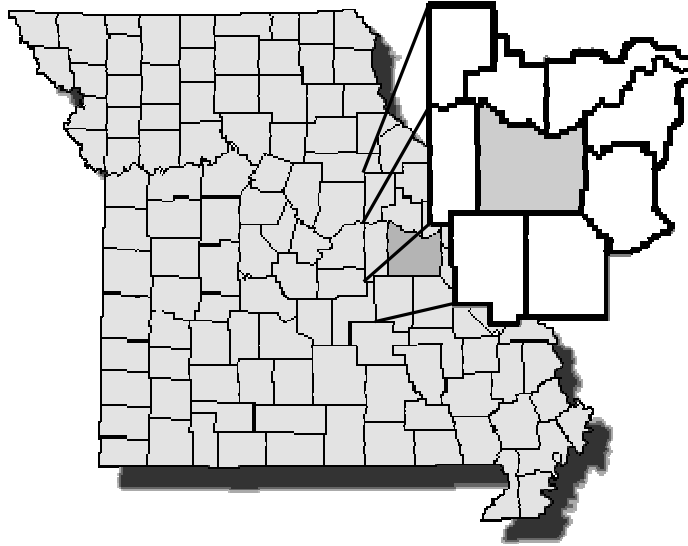
FRANKLIN COUNTY WORKFORCE MARKET STUDY

Includes: Crawford, Franklin, Gasconade, Montgomery and Warren Counties and parts of Jefferson, St. Charles, St. Louis, and Washington Counties



Conducted By:
Growth Services
P.O. Box 105093
Jefferson City, MO 65110
573-635-7723
www.growthservices.org
edm@growthservices.org

FRANKLIN COUNTY WORKFORCE MARKET STUDY



Contributing Members:

Ameren Corporation
City of Pacific
City of Sullivan
City of Union
City of Washington
Franklin County Commission
City of Gerald
City of New Haven
City of St. Clair

TABLE OF CONTENTS

I. EXECUTIVE SUMMARY

INTRODUCTION	I - 1
GENERAL FINDINGS	I - 1, 2
WORKFORCE PROFILE FINDINGS	I - 2
WORKFORCE QUALITY FINDINGS	I - 3
WORKFORCE COSTS FINDINGS	I - 4
WORKFORCE AVAILABILITY	I - 5
CONCLUSION	I - 6

II. WORKFORCE PROFILE

MAP	II - 1
OVERVIEW	II - 2
POPULATION	II - 2
EMPLOYMENT	II - 3, 4
INCOME	II - 5
COMMUTING PATTERNS	II - 6
WORKFORCE INDICATORS	II - 7

WORKFORCE QUALITY

A. EMPLOYMENT PROFILE	III - 1
INTRODUCTION AND METHODOLOGY	III - 1
RESPONSES	III - 1
EMPLOYMENT LEVEL	III - 1
LOCATION AGE	III - 1
EMPLOYMENT TIME	III - 1
WORKER DEMOGRAPHICS	III - 1
UNIONS	III - 1
SHIFT DIFFERENTIAL	III - 2
ABSENTEEISM RATE	III - 2
TURNOVER RATE	III - 2
TUITION	III - 2
COMMUTING DISTANCE	III - 2
B. QUALITY OF LABOR CHARACTERISTICS	III - 3
INDEX RANGES AND AVERAGES	III - 3
C. SKILLS TRAINING NEEDS	III - 4
TABLES AND GRAPH	III - 4, 5, 6
D. EMPLOYMENT & PRODUCTIVITY	III - 7
FORMAL TRAINING PROGRAMS	III - 7
EMPLOYEE DRUG TESTING	III - 7
EMPLOYMENT PROSPECTS IN ONE YEAR	III - 7
OUTSOURCING TO VENDORS AND SUPPLIERS	III - 7

PRE-EMPLOYMENT TESTING	III - 8
USAGE OF TEMPORARY WORKERS	III - 8
APPLICATIONS TO FILL PRODUCTION POSITIONS	III - 8
PREFERRED RECRUITMENT SOURCES	III - 9
REASONS FOR TURNOVER	III - 10
LABOR SHORTAGES	III - 11
RECRUITMENT OF TALENT TO THE AREA	III - 12, 13

IV. WORKFORCE COSTS

OVERVIEW	IV - 1, 2
BENEFIT PROGRAMS	IV - 3
HOURLY WAGE	IV - 3
WAGE COMPENSATION SUMMARY	IV - 4, 5, 6
WAGE RATE COMPARISONS	IV - 7
DESIRED WAGES VS ACTUAL WAGES	IV - 8,9,10,11

V. WORKFORCE AVAILABILITY

A. OVERVIEW	V - 1, 2
INTRODUCTION	V - 1
LOCAL WORKFORCE	V - 2
GENERAL COMMENTS	V - 2
B. AVAILABLE WORKFORCE	V - 3
TOTAL AVAILABLE WORKERS	V - 3
OCCUPATION GROUPS	V - 4
UNDEREMPLOYED	V - 5
DESIRED WAGE	V - 6
EDUCATION LEVEL	V - 7
COMMUTING DISTANCES	V - 7
AGE/JOB LONGEVITY/GENDER	V - 8
JOB CHANGE INDUCEMENT	V - 9
CHANGING PRIMARY EMPLOYMENT FIELD	V - 9
C. INCREASING WORKFORCE AVAILABILITY	V - 10
WORKING STUDENTS	V - 10
SPOUSAL EMPLOYMENT	V - 10
WORKING OUTSIDE THE LABOR MARKET	V - 10
SOURCES FOR AVAILABLE WORKERS	V - 11

GLOSSARY OF TERMS

Area Labor Market: (ALM) The geographic area normally designated with a core community or county with a surrounding area within a normal commute of 35 to 50 miles for work. The Franklin County ALM consists of nine counties with eight or parts thereof adjacent and touching Franklin County. The counties are: Crawford, Franklin, Gasconade, Jefferson, Montgomery, St. Charles, St. Louis, Warren and Washington Counties. It is sometimes called a Labor Shed or Labor Pool.

Available Workforce: Represents adults ages 18 to 65 who indicate they are either looking for a job or would consider changing jobs for the right employment option or opportunity. Further, it includes potential workers excluded from the Civilian Labor Force such as full-time students willing to take a job, homemakers who have not yet sought employment, military personnel who may be leaving military employment in the near future, and retired individuals who may be willing and able to be gainfully employed. The term "non-employed or not-employed" refers not only to official unemployed members of the Civilian Labor Force but to any non-employed full-time students, homemakers, retirees, and disabled individuals.

Civilian Employment: The employment of all residents living in a county or area and working anywhere (counts people). It counts all working people including self-employed, as well as job holders. It is reported monthly by Federal and State Labor agencies.

Civilian Labor Force (CLF): Represents all individuals working and actively seeking employment. Reported monthly by Federal and State Labor agencies.

Industry Employment: The employment of all workers working in the county and living anywhere (counts jobs). Industry Employment counts only those on a payroll where withholdings are taken from their checks. An individual could be counted twice on Industry Employment if the individual held two jobs. It is reported periodically by Federal and State Labor agencies.

Franklin County Economic Development Group: The authorizing organization of the Workforce Study for the Franklin County Area Labor Market (FCALM).

Underemployed: Employees currently working and who possess the skills, education and experience to qualify for better jobs.

I. EXECUTIVE SUMMARY



INTRODUCTION

The Franklin County Economic Development Group commissioned a Workforce Market Study to measure the Workforce Quality, Availability and Cost in a nine-county Area Labor Market (ALM). The purpose of the Franklin County Workforce Market Study is to provide employers with definitive labor information necessary to make better-informed decisions and minimize risks for workforce hiring, retention and development needs. Further, the Workforce Market Study provides local officials the competitive realities necessary in today's workforce market to develop the strategies for improving the Skills, Quality and Availability of its workforce and for Franklin County Employers to better compete at all market levels.

GENERAL FINDINGS, OPPORTUNITIES AND CHALLENGES

The Workforce Market Study shows that Franklin County Area Labor Market (FCALM) provides a stable, competitive and productive workforce. When comparing the quality, availability and cost of this workforce asset to other Area Labor Markets, the overall value and competitiveness becomes apparent. The four components of this study go into considerable detail to quantify the strengths and challenges of this workforce. The four areas are:

- **WORKFORCE PROFILE**
- **WORKFORCE QUALITY**
- **WORKFORCE COST**
- **WORKFORCE AVAILABILITY**

While the measurable characteristics such as productivity and cost for the FCALM are competitive to other labor markets, the workforce management challenges align closely to those reported for the nation as a whole. Health care and other compensation costs continue to rise. The average age of the workforce is rising with the baby-boomers starting to retire and replacements not always ready to fill the gap. Meanwhile, companies continue to search for the talent that will give them a competitive edge, while coping with skills shortages in the local candidate marketplace.

With the right employment opportunities, the FCALM appears well positioned to attract and retain the talent necessary for growth of new and existing businesses representing local, regional and national markets. The FCALM has several advantages, the first is geographic: With Franklin County being part of the St. Louis Metropolitan Statistical Area (MSA), the location provides advantages with both urban and rural amenities for its workforce. It has the vast workforce talent pool within easy commute and the cost advantages in most cases inherent of a more rural setting. From 2000 to 2005, the population of the nine-county Franklin County Area Labor Market grew at a faster rate than the population of the state of Missouri and the nation.

The second advantage is Education and Training with the location of East Central College and a quality primary and secondary school system which employers ranked the highest of nine Recruitment Factors for attracting and retaining a talented workforce. As part of the St. Louis MSA, the area offers some of the nation's finest four-year Universities and Colleges within an easy commute. This presents industry and business located in the area first choice of a highly trained and disciplined workforce.

In addition to Quality Education, other Recruiting issues which ranked high with local employers for recruiting and retaining a talented and skilled workforce are: Quality of Life, Medical Services and Housing. These quality and cost-of-living issues are attractive to both people and business.

Finally, the strong presence of manufacturing in Franklin County makes the area more attractive to suppliers and advanced manufacturing firms. With the Missouri River serving as a boundary on the north makes Franklin County rich in the history of commerce and trade. With the river and transportation routes from the steamboat to the railroad has given the manufacturing industry a strong presence from the Civil War to this day.

WORKFORCE PROFILE FINDINGS

The Workforce Profile Findings is information derived from public sources and applied to the designated nine-county geographic Area Labor Market. This information can be directly compared to other ALM's, MSA's or County, State or national locations. The profile's focus is primarily in four major areas of Population, Income, Employment and Worker Commuting Patterns.

- The population in the 2005 Census estimates for Franklin County is 99,090 and 5.6% growth rate since the 2000 Census. This is above the state of Missouri growth rate of 3.6% and compares with the national average of 5.3%.
- The age distribution for Franklin County, from age 18 to 65, represents 62.6% of the population compared with 61.0% for the State of Missouri and 61.9% for the USA.
- The population for the Franklin County designated nine county Area Labor Market (ALM) is 259,900 with a civilian labor force of 134,600.
- The population in the designated nine county ALM grew 6.4% from 2000 to 2005.
- The employment for Manufacturing in 2004 was 9,651 for 30.7% of the total private sector employment in Franklin County. This compares to 11.4% for St. Louis County, 14.1% for the state of Missouri and 13.2% nationally.
- Franklin County has a Civilian Employment growth rate of .5% from 2000 to 2005 compared to the state of Missouri at -.5%.
- Franklin County had a per capita income of \$28,130 in 2004 compared to the State of Missouri at \$30,475 and \$33,050 for the nation.
- The average Weekly Wage for Franklin County was \$556 in 2005 compared with the State of Missouri at \$691 and \$782 for the nation.
- Franklin County had the second lowest Turnover rate 10.0% of the nine counties in the ALM as ranked by the Bureau of Labor Statistics with the Quarterly Workforce Indicators for the third quarter of 2005.
- The Commuting Patterns for the 2000 Census showed a net improvement of 500 workers for Franklin County over 1990.

WORKFORCE QUALITY FINDINGS

The Workforce Quality Findings reflect the views and perspective of employers in Franklin County only and represents the demand side of the workforce. The report reflects the views of employers who responded to the survey and is represented by Manufacturers with 47% of all respondents and all responding employers with an average of 139 employees per firm. The findings are as follows:

- The average age of the workforce as reported by employers in the Franklin County ALM is 39.4 years of age with 9.3 years average length of employment and 13.2 years of education.
- The absenteeism rate is 3.4% for all employers (58 of 86) with Manufacturers (26 of 41) reporting 3.2%.
- The turnover rate is 17.5% and compares with the U.S. Department of Labor rate for August 2003 at 19.2%
- In the Quality of Labor Characteristics Friendly and Product Quality scored the highest with a tie rating of 4.22 and 4.17 out of 5.0 with Honesty and Safety tied at 4.07. Of the 14 characteristics evaluated, Initial Skills scored the lowest with a 3.10.
- Of the 87 specific skills listed in Skills Training Needs in the nine Skill Category Groups, employers indicated 306 training need responses in the Management/Supervision Category. Technical Skills and Workplace Skills were ranked next in line with 186 and 162 responses respectively.
- Team Leadership was the Specific Skill with the most responses followed by Spreadsheets, Conflict Resolution and CPR/First Aid. Soft skills were listed more frequently than hard skills.
- Sixty-four percent 64% of the firms responding have a formal training program.
- Fifty-five percent 55% of the firms responding conduct drug testing either during pre-employment screening or on a random basis.
- Thirty-four percent 34% of the firms indicated they could fill five production positions with less than 15 applications, while 48% would require between 16 and 30 applications and 15% stating it takes more than 30 applications to fill the five positions.
- In the labor shortage area, overall, the Unskilled category was listed as the most serious, followed by the Skilled and Managerial/Professional areas. Both the Manufacturers and the Health Care ranked the Skilled category followed by the Unskilled category as the most serious.
- The major reasons for leaving a job as listed by employers were: Higher Paying Jobs, followed by Leaving the Area, and Personal and Family Conflicts.
- Most employers in the Franklin County ALM anticipate the employment prospects for the next year to remain steady with 41% of the employers projecting an increase and only 2.4% a decrease.
- The largest area for outsourcing is in Maintenance and Accounting with no changes anticipated in the near future. Fifty-five percent (55%) of the manufacturers bought some outside components for final assembly of their products.
- Forty-one percent (41%) of all responding employers indicated they require pre-employment testing while fifty-nine percent (59%) of employers with 100 or more employees require pre-employment testing. Skills testing was the highest followed by Mental Abilities, Integrity and Personality.

WORKFORCE COST FINDINGS

The Workforce Cost Findings reflect the views and perspective of employers primarily, however, also of the workers and non-employed as it relates to desired wages for job change and availability. The wage comparison data with the occupational data utilized from state and federal sources can be directly compared to other state and national areas. The findings are as follows:

- Ninety-seven percent (97%) of the firms provide a health insurance plan with over three-fourths contributing 75% of the premiums for their employees. Dependent coverage for health insurance is provided by 81% of the firms responding to the survey.
- Over 65% of the firms provide some pension plan assistance to employees.
- Over one-half of the firms provide dental insurance coverage and 24% provide group life insurance coverage for dependents.
- Eighty-four percent (84%) of the employers provide a 401k plan with 67% of those firms contributing to the plan.
- Employees are provided an average of 8.8 paid holidays per year, while the national average is 9.3 days.
- Employers provide an estimated 27.2% average dollar contribution for benefits as a percentage of total compensation.
- The overall reported average wage for Franklin County is \$14.95 and compares to the 2005 average hourly wage of USA \$18.21; Missouri \$16.66; Chicago Metro \$19.74; Atlanta Metro \$19.34 and Indianapolis Metro \$17.78.
- The hourly wage rates for all of the reported 47 Occupation positions compare favorably with state and national averages.

WORKFORCE AVAILABILITY FINDINGS

The Workforce Availability Findings reflect the views and perspective of workers and non-employed of the age 18 through 64 and represents the supply side of the workforce. The full report distinguishes the difference of the workforce from the five-county metro ALM of the workforce from the four-county rural ALM. The overall findings are as follows:

- About 29% of the total population in the Franklin County nine-county ALM (or 76,867 persons) is considered to be part of the available workforce.
- Of the Available Workforce, it is estimated that 8,722 not-employed and 7,902 employed persons are seeking new employment, while 60,243 employed persons would consider different employment with the right employment opportunities.
- The Franklin County ALM Occupation Category has an Available Workforce of 19.3% in the Professional/Technical category, 44.5% in the Manufacturing/Production category and 24.9% in the Services category.
- Approximately 24,057 individuals (31.3% of the Available Workforce) are underemployed.
- Thirty-one percent (31%) of the Available Workforce would be interested in employment with a wage of up to \$12.99 per hour. The average desired wage rate for Professional/Technical is \$18.48, Manufacturing/Production \$18.51, Services \$12.66 and Working Students \$15.20.
- The education level of the Available Workforce shows 41.5% having at least some college education. 86.2% have at least a high school diploma.
- 67,259, or 87.5% of the Available Workforce would travel more than 15 minutes/miles one way for work, while 40,278 or 52% would commute more than 30 minutes/miles and 9,608 or 12.5% would travel more than 60 minutes/miles. The Available Workforce is willing to commute about an average of 20 minutes/miles compared to all workers averaging about 29 minutes/miles.
- 29,133 or 27.9% of the Available Workforce are under the age of 40. The average age of the Available Workforce in Professional/Technical is 41.6, Manufacturing/Production 42.2, Services 40.5 and Working Students at 29.4. Working Students is not a separate category but is included in all the occupations. The overall average age of the Available Workforce is 44.0.
- The top motivator for changing jobs among those open for the right opportunities is Salary with 84.1% responding yes, followed by Retirement with 73.5% and Flexible Hours at 68.4%.
- A majority (59% or 35,821 individuals) of the Available Workforce stated they are willing to work outside of their primary field of employment (i.e., manufacturing to the service sector, etc.).
- The average years on the job for the Franklin County ALM is 12.8 years and reflects both a stable and mature workforce.
- The Franklin County metro ALM reflects an available workforce that is younger, better educated, longer tenured with a greater diversity of talent, however, is more costly, with greater expectations of benefits as part of total compensation, less flexible to change of primary employment field and generally prefer less commuting time.
- The **underemployed** provides the best opportunity of potential applicants representing a segment of the available workforce that is younger, better educated and more motivated than the available workforce in general.

CONCLUSION

This Workforce Study presents information for balance from both the Supply and Demand side of local Area Labor Markets. The study assesses the current environment for existing and new employers on the quality of the workforce, the available labor market for new hires and the cost structure in wages and benefits. The Workforce Quality is determined from the Employer's perspective and presents information for the Demand side. The Workforce Availability is determined from the Workers and Non-employed perspective and provides information for the Supply side.

While considerable information about workforce issues is available at the national level, less information is available at the local level, with adequate data to make objective decisions. Yet it is at the local level where the rubber hits the road and where employers must have a competitive workforce to produce products and services for the local and global marketplace. While employers are concerned about Over-employment and workers with deficient skills and who are under-qualified, the worker and community are concerned about Underemployment and workers who have excess skills and are over-qualified for those jobs. Although the dynamics of the workplace will not change dramatically, employers will continue to recruit the best employees with the best skills for the best value and workers will continue to seek the best jobs with the best compensation package and work environment. The balance for a competitive workforce is critical with the employer, community, education and worker all having a major stake in developing, attracting and retaining its workforce.

With increasing workforce shortages for the future anticipated from the demographic changes in an aging population, the question of a more active approach to increasing the labor pool with productive workers is crucial. Weighing the cost for education and other programs with the social and economic benefits will be key in remaining competitive in a global economy.

The study confirms that Franklin County and the nine-county designated ALM has a productive and competitive workforce in cost relative to quality and availability and compares favorably to major labor markets, the state and nation.

Questions and design of the survey instrument are the property of Growth Services, an independent consultant; the findings were developed from the data without any outside influence.

II. WORKFORCE PROFILE

Franklin County Area Labor Market

Nine County - Sources of Workforce Assets



The Franklin County Area Labor Market consists of five entire counties and parts of four counties with designated Zip Codes. The entire counties are: Crawford, Franklin, Gasconade, Montgomery and Warren Counties. The partial counties and their zip codes are: Jefferson (63016, 63023, 63030, 63049, 63050 and 63051); St. Charles (63332); St. Louis (63025); and Washington (63664 and 63071)

Estimated Population and Civilian Labor Force		
	Population	Labor Force
Franklin County (Nine County) ALM	259,900	134,600
Franklin County (Five County Metro) ALM*	198,200	106,200
Franklin County (Four County Rural) ALM**	61,700	28,400
Franklin County Alone***	99,090	54,291

* The Franklin County Metro ALM consists of five counties and are either entire or partial counties as above. They are: Franklin, Jefferson, St. Charles, St. Louis and Warren Counties.

** The Franklin County Rural ALM Consists of four counties and are either entire or partial counties as above. They are: Crawford, Gasconade, Montgomery and Washington Counties. Washington County, while in the St. Louis MSA, for purposes of this study is included in the Franklin County Rural ALM due to its more rural characteristics.

*** Franklin County Alone is the area within the designated boundaries of Franklin County. (Is included in the Five County Metro and Nine County ALM)

OVERVIEW

The Workforce Profile provides a quick overview of data relating to population, employment, income, workflow commuting patterns and workforce indicators available from public sources such as the U.S. Census, the Bureau of Labor Statistics and the Missouri Department of Economic Development MERIC. Where possible this review makes direct comparisons with the local Area Labor Market (ALM), State of Missouri and the USA nationally.

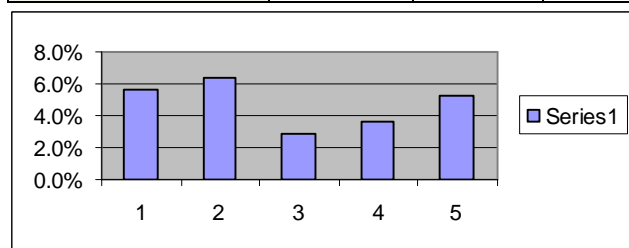
The presentation in the following charts and tables is used to analyze the local workforce market for trends and competitiveness with the state and nation. In the past, the evaluation process focused primarily on the local Civilian Labor Force and it was assumed a high unemployment rate translated to an ample supply of workers. Today, this is no longer true. The economic development evaluation process also includes information on the quality, availability and cost of the workforce. Each of these three areas is covered in separate sections of this report.

POPULATION

The population for the area represented by the Franklin County Area Labor Market grew 6.4% from 2000 to 2005 compared to the State of Missouri rate of 3.6%. The 2005 population for the nine-county area labor market is 259,900 compared to 244,900 in 2000. (See Area Population Comparisons below)

In the age category, Franklin County has a higher percentage of the population under 18 years of age compared to either the State of Missouri or the United States. The age distribution from age 18 to 64 is 62.6% of the population, identical to the State of Missouri and the United States both at 62.6%. In population diversity Franklin County is represented by 2.2% for minorities and compares with Missouri at 14.6% and the USA at 19.6%. (See Franklin County People QuickFacts below)

Franklin County Area Labor Market Area Population Comparisons			
County Area	July 1, 2005 Estimate	2000 Census	2000-05 % Change
1 Franklin County	99,090	93,807	5.6%
2 FC ALM* (Est)	259,900	244,200	6.4%
3 St. Louis, MO-IL (MSA)	2,778,518	2,698,687	2.9%
4 Missouri	5,800,310	5,595,211	3.6%
5 USA	296,410,404	281,421,906	5.3%



*FC ALM, Franklin County Nine County Area Labor Market all: Crawford, Franklin, Gasconade, Montgomery, and Warren Counties; Parts of: Jefferson, St. Charles, St. Louis and Washington Counties

Source: U.S. Census & MO MERIC

Franklin County People QuickFacts Percentage Comparisons			
Category	Franklin County	Missouri	USA
People Under 5 years old, 2004	6.5%	6.5%	6.8%
People Under 18 years old, 2004	25.1%	24.1%	25.0%
People 65 years old and over, 2004	12.3%	13.3%	12.4%
Females, 2004	50.3%	51.2%	50.8%
White people, 2004	97.8%	85.4%	80.4%
Minority, Ethnic People, 2000	2.2%	14.6%	19.6%
Foreign born people, 2000	0.8%	2.7%	11.1%
Mean Travel Time (Minutes)	29.2	23.8	25.5
High School graduates, age 25+, 2000	77.7%	81.3%	80.4%
Homeownership rate, 2000	78.1%	70.3%	66.2%
Housing Units in multi-units, 2000	10.7%	20.0%	26.4%
People below poverty, 2003	8.4%	11.6%	12.5%
Minority-owned firms, 1997	2.2%	6.5%	14.6%
Women-owned firms, 1997	26.7%	25.2%	26.0%

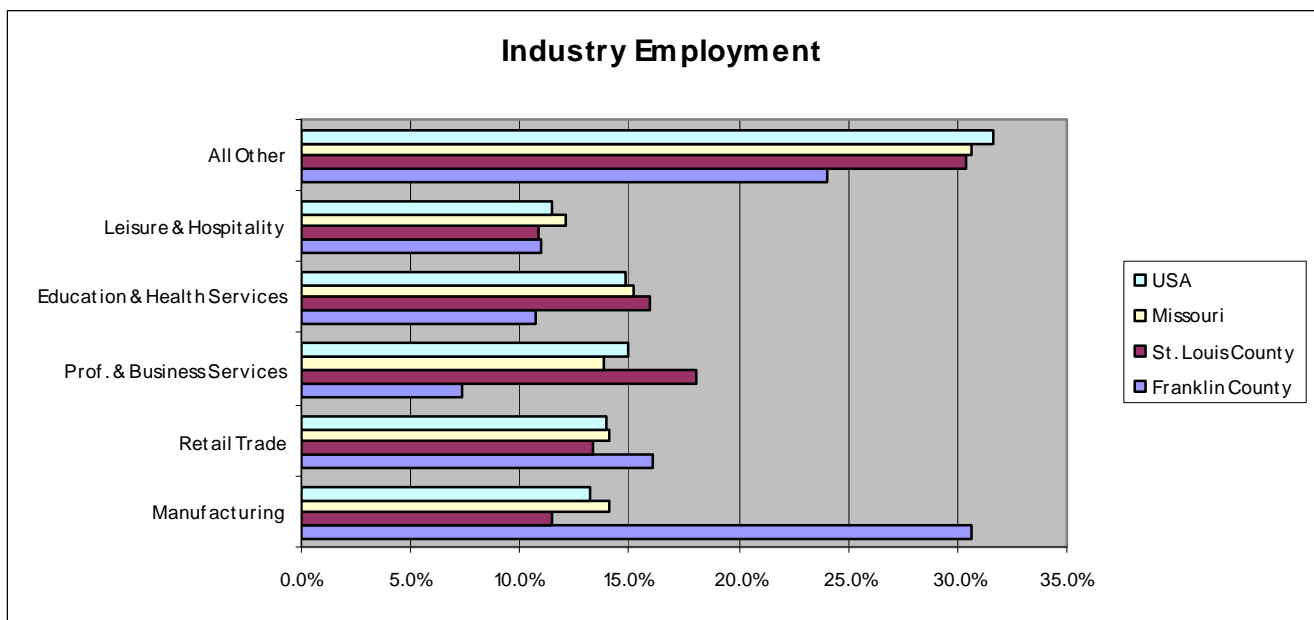
Source: US Census

EMPLOYMENT

The employment information is presented in two categories: Civilian Employment and Industry Employment. Civilian Employment is the employment of all residents living in a county and working anywhere (counts people). Industry Employment is the employment of all workers working in the county and living anywhere (counts jobs). The higher ratio when comparing Industry Employment with Civilian Employment may indicate a greater commute into a county for work, while the lower ratio may indicate commuting out of the county for work.

Another indicator of Industry Employment is the relationship of sector employment to the total Private Sector Employment. An example would be Franklin County's Manufacturing Sector with 30.7% of all jobs. This compares with St. Louis County with 11.4%. Further, it compares with Missouri at 14.1% and the United States at 13.2%. By comparing the county to state and national averages it becomes evident that Franklin County's local economy is primarily manufacturing based.

The second strongest area is in Retail Trade which is higher than the state and national averages. In all the other sectors Franklin County appears to be below par in employment distribution when compared to the state and nation. Government is also considered a part of total Industry Employment but the following data is Private Sector only. The percentages by industry would be lower if Government employment were included.



Industry Employment								
Employment Distribution -- Private Sector								
Industry Group	Franklin County		St. Louis County		Missouri		USA	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Manufacturing	9,651	30.7%	63,485	11.4%	312,094	14.1%	14,257,380	13.2%
Retail Trade	5,088	16.1%	73,984	13.3%	312,678	14.1%	15,060,686	13.9%
Prof. & Business Services	2,317	7.4%	101,316	18.1%	306,106	13.8%	16,294,776	15.0%
Education & Health Services	3,377	10.7%	89,586	16.0%	335,998	15.2%	16,084,963	14.8%
Leisure & Hospitality	3,457	11.0%	60,121	10.8%	268,283	12.1%	12,467,597	11.5%
All Other	7,590	24.1%	169,961	30.4%	678,654	30.7%	34,324,664	31.6%
Total	31,480	100.0%	558,453	100.0%	2,213,813	100.0%	108,490,066	100.0%

Franklin County Area Labor Market (ALM)
Source: Bureau of Labor Statistics (2004)

While the population for Franklin County has been growing slightly faster than the state and nation, the unemployment rate is also slightly higher. The unemployment rate for Franklin County is 5.8% and compares with the St. Louis Metro at 5.3%, Missouri at 4.9% and the United States at 4.6%.

Another element when comparing Industry Employment with Civilian Employment is that Civilian Employment counts all people working including self-employed, as well as job holders; whereas Industry Employment counts only those on a payroll where withholdings are taken from their checks. An individual could be counted twice on Industry Employment if the individual held two jobs.

Employment Growth			
County, Area	2000	2005	Percent Change
Franklin County	49,987	50,239	0.5%
St. Louis MO-IL MSA	1,385,968	1,380,168	-0.4%
Missouri	2,875,336	2,862,153	-0.5%

Source: Bureau of Labor Statistics & MO MERIC
Franklin County Area Labor Market ALM

Civilian Employment				
August, 2006				
County, Area	Labor Force	Employment	Unemployment	Unemployment Rate
Franklin	54,291	51,147	3,144	5.8%
St. Louis MO-IL MSA	1,485,877	1,406,477	79,400	5.3%
Missouri	3,058,052	2,908,278	149,774	4.9%
USA	152,465,000	145,379,000	7,086,000	4.6%

Franklin County Area Labor Market (ALM)
Source: Bureau of Labor Statistics & MO MERIC

INCOME

The income and wage information is provided on two levels: Per Capita Income and Average Weekly Wage. The Per Capita Income includes all income earned through wages, transfer payments, dividends, interest, etc.

The Per Capita Income for Franklin County grew 9.3% from 2000 to 2004. This compares to a growth rate of 11.0% for the Franklin County ALM, 12.3% for the St. Louis Metro, 11.9% for the State of Missouri and 10.7% for the United States.

The overall Average Weekly Wage for Franklin County grew 11.2% from 2001 to 2005 with the manufacturing sector growing at 18.5%. The Education & Health Services sector grew at 15.5% and was above the Service Providing and Overall averages. The 2005 average of \$522 per week for Education and Health Services was 23.5% lower than the State of Missouri average and 28% lower than the National average of \$724.

INCOME AND WAGES			
Per Capita Income			
Area	2000	2004	% Change 2000 - 2004
Franklin County	\$25,729	\$28,130	9.3%
FC ALM* (Est)	\$25,147	\$27,917	11.0%
St. Louis, MO-IL (MSA)	\$30,942	\$34,735	12.3%
Missouri	\$27,241	\$30,475	11.9%
USA	\$29,845	\$33,050	10.7%

*FC ALM: Nine County Franklin County Area Labor Market (ALM)

Source: Bureau of Economic Analysis & MO MERIC

Goods Producing Comparisons									
	Overall			Goods Producing			Manufacturing		
	2001	2005	Percent	2001	2005	Percent	2001	2005	Percent
Franklin County	\$500	\$556	11.2%	\$591	\$691	16.9%	\$590	\$699	18.5%
St. Louis, MO-IL MSA	\$687	\$769	11.9%	\$885	\$996	12.5%	\$885	\$992	12.1%
Missouri	\$623	\$691	10.9%	\$746	\$829	11.1%	\$752	\$844	12.2%
USA	\$697	\$782	12.2%	\$789	\$890	12.8%	\$826	\$948	14.8%

Service Providing Comparisons									
	Overall			Service Providing			Education & Health Services		
	2001	2005	Percent	2001	2005	Percent	2001	2005	Percent
Franklin County	\$500	\$556	11.2%	\$429	\$471	9.8%	\$452	\$522	15.5%
St. Louis, MO-IL MSA	\$687	\$769	11.9%	\$640	\$721	12.7%	\$624	\$713	14.3%
Missouri	\$623	\$691	10.9%	\$594	\$661	11.3%	\$601	\$682	13.5%
USA	\$697	\$782	12.2%	\$668	\$750	12.3%	\$629	\$724	15.1%

Source: Bureau of Labor Statistics

COMMUTING PATTERNS

Workflows and commuting patterns are important elements in an area's workforce and economy. The 2000 Census showed Franklin County with 40.1% of its workers working outside the county. The average commute time was 29.2 minutes and compares with the State of Missouri at 23.8 and 25.5 at the national level.

The largest number of workers (11,840 out of 18,202) working outside the county commute to St. Louis County. While 18,202 workers commuted out of the county for work, 9,069 entered Franklin County for work for a net outflow of 9,123 workers. This compares to a net out-flow of 9,699 workers in 1990 and an improvement of over 500. With better job opportunities in Franklin County, this positive trend should continue. (See Table and Chart below)

Commuting Patterns To and From Franklin County

From Franklin County

To -->	Crawford	Gasconade	Jefferson	Montgomery	St. Charles	St. Louis	Warren	Washington	St. Louis City	Other Areas	Total*
1990	466	461	649	0	526	9333	232	112	2391	683	14853
2000	454	759	784	16	769	11840	344	19	2250	967	18202

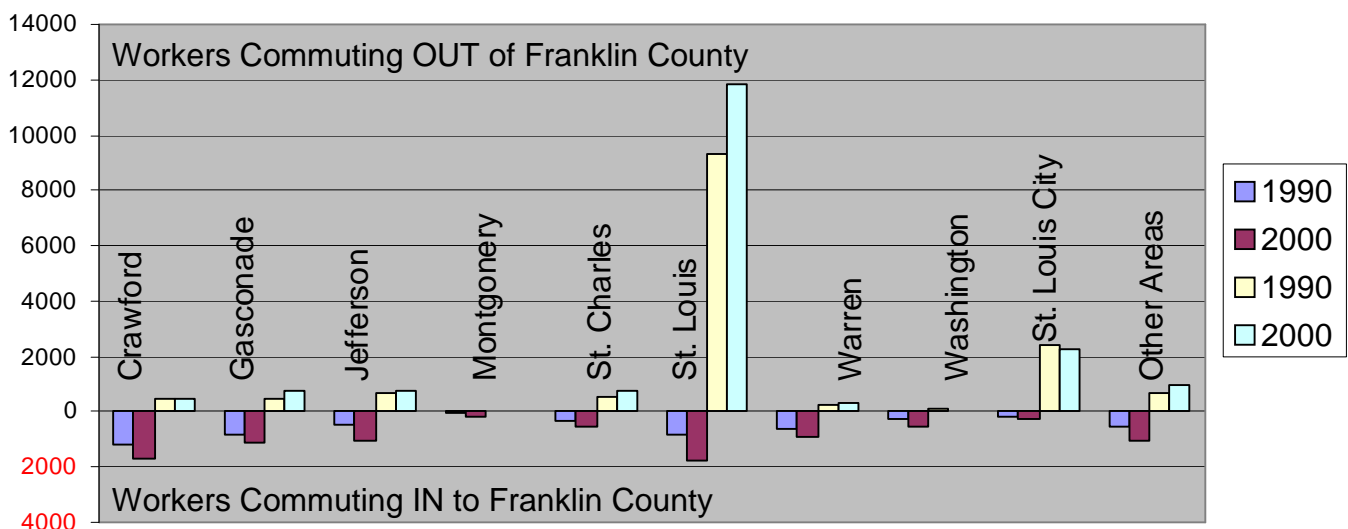
To Franklin County

From -->	Crawford	Gasconade	Jefferson	Montgomery	St. Charles	St. Louis	Warren	Washington	St. Louis City	Other Areas	Total*
1990	1190	800	446	33	292	796	608	267	149	573	5154
2000	1728	1103	1013	155	555	1752	879	573	291	1020	9069

*In 2000, the difference of 9,069 commuting to Franklin County and 18,202 commuting out of Franklin county for work resulted in a net decrease to the workforce of 9,133.

**Source: U.S. Census Bureau

Franklin County Commuting Patterns



WORKFORCE INDICATORS

The following workforce indicators for the Franklin County Area Labor Market (ALM) are now available on-line with Missouri a participating partner with the U.S. Census. This relatively new tool provides easy access to reports which provide employment growth measures for the selected employment area including net job flows, new hires, separations, turnover, the average monthly earnings and the average new hires earnings.

The table shows comparisons for the third quarter of 2005 with the State of Missouri and the other counties in the Franklin County ALM. The 10.0% turnover compares favorably with the State of Missouri and the other counties in the ALM implying a relatively stable workforce. The average monthly earnings of \$2,622 is below the state average of \$3,071 and ranks third highest in the nine county ALM.

Quarterly Workforce Indicators (QWI) Quick Facts						
	Missouri (Q3)	Franklin (Q3)	Crawford (Q3)	Gasconade (Q3)	Jefferson (Q3)	Montgomery (Q3)
Total Employment	2,587,383	35,759	6,584	5,737	45,916	3,479
Net Job Flows	-22,876	-154	-234	-40	456	-57
Job Creation	107,779	1,723	309	269	2,899	203
New Hires	503,744	7,632	1,579	1,102	11,498	764
Separations	580,396	8,545	1,962	1,275	13,076	886
Turnover	10.20%	10.00%	11.30%	10.60%	11.20%	11.50%
Avg. Monthly Earnings	\$3,071.00	\$2,622.00	\$2,184.00	\$2,189.00	\$2,444.00	\$2,198.00
Avg. New Hire Earnings	\$1,875.00	\$1,553.00	\$1,315.00	\$1,291.00	\$1,514.00	\$1,592.00

Quarterly Workforce Indicators (QWI) Quick Facts						
	Missouri (Q3)	Franklin (Q3)	St. Charles (Q3)	St. Louis (Q3)	Warren (Q3)	Washington (Q3)
Total Employment	2,587,383	35,759	114,829	600,198	6,670	4,415
Net Job Flows	-22,876	-154	-1,039	-7,500	-130	-123
Job Creation	107,779	1,723	4,907	21,999	301	156
New Hires	503,744	7,632	23,716	106,774	1,435	678
Separations	580,396	8,545	26,924	125,249	1,757	893
Turnover	10.20%	10.00%	11.00%	10.10%	11.70%	9.90%
Avg. Monthly Earnings	\$3,071.00	\$2,622.00	\$2,986.00	\$3,640.00	\$2,292.00	\$1,907.00
Avg. New Hire Earnings	\$1,875.00	\$1,553.00	\$1,752.00	\$2,196.00	\$1,602.00	\$1,241.00

Source: Bureau of Labor and Statistics

III. WORKFORCE QUALITY

A. EMPLOYMENT PROFILE

INTRODUCTION AND METHODOLOGY

Names of 366 business firms with 20 or more employees for Franklin County (ALM) were purchased from InfoUSA, Omaha, NE a National Mailing List Vendor, and updated using local sources.

The results for the Workforce Quality and Cost sections are derived from a four-page employer survey developed and reviewed by Growth Services to reflect local preferences. The main sections of the Quality Section are: Employment Profile, Employment and Productivity, and Training Needs Assessment. A Training Needs Assessment with 87 specific skills is included to identify skill and training needs in the Franklin County ALM. The Employer Survey also includes Wage and Benefit Compensation Costs and is covered under Section IV Workforce Costs.

RESPONSES

A total of 86 business firms completed and returned the Employer Quality Questionnaire. This represents 23.5 percent of the 366 firms who received the survey. (See Section IV, Page 2)

EMPLOYMENT LEVEL

The 86 firms responding to the survey employ 11,954 persons with an average of 139 employees per firm. The largest respondent has over 1,500 employees while the smallest has nine employees. This represents approximately 23% of people employed and residing in Franklin County.

BUSINESS LOCATION AGE

The average number of years for the businesses at current locations is 28 years. This includes 11 firms with 50 years or more at the same location.

EMPLOYMENT TIME

Of the 11,954 total number of employees, 10,563 (88.4 percent) are permanent full-time employees and 1,391 are part-time. Twenty-four firms employ temporary personnel with a total of 666 such workers.

WORKER DEMOGRAPHICS

The average length employment per employee is 9.3 years. The average age of employees is 39.4 years. The range in average age is 25 years to 49 years with only two firms reporting an average age of 50 years. Employees average 13.2 years of full-time education with 21 firms reporting averages above this level.

UNIONS

Eleven (11) firms reported hourly union employment with a total of 690 employees. This represents 5.8 percent of the total employment by firms responding to the survey. There were no work stoppages reported over the last five years. This compares to the State of Missouri with 11.5% of the total workforce.

SHIFT DIFFERENTIAL

There are 26 firms reporting multi-shift operations with the average hourly shift differential for second shift of 51 cents per hour and the third shift 84 cents per hour.

ABSENTEEISM RATE

The average absenteeism rate for all respondents (58 of 86) over a 12-month period is reported at 3.4% and for manufacturers (26 of 41) it was 3.2%. This compares to the national average of 3.5% as reported by the Bureau of Labor Statistics in 2002.

TURNOVER RATE

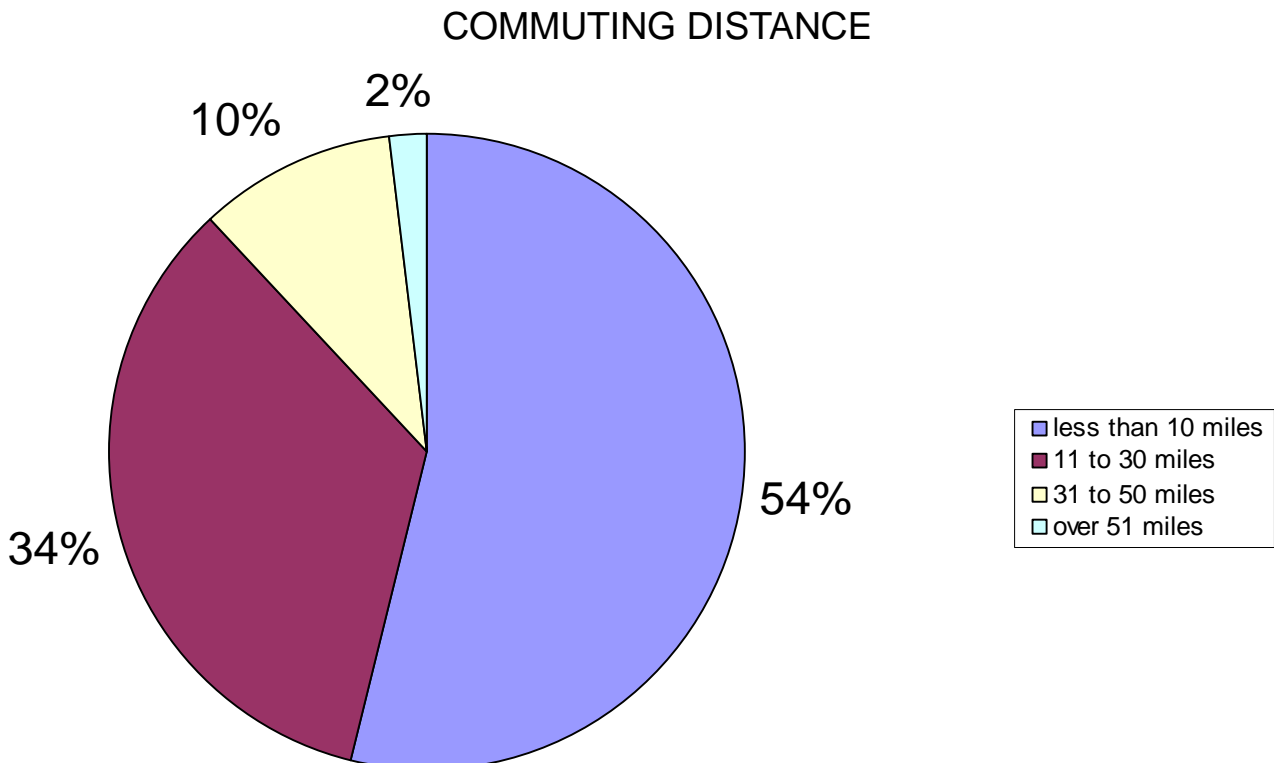
The average turnover rate over a 12-month period is 17.5%. This compares to the U.S. 1990 rate at 21.7% and the 2000 rate of 28.6%. The most recent turnover rate through August 2003 by the U.S. Department of Labor indicates a 21.6%. The new Jobs Openings and Labor Turnover Survey (JOLTS) reporting system by the BLS provides a new methodology which shows a more uniform and detailed explanation of Turnover. (See Workforce Indicators on page II-7)

TUITION

Seventeen firms 44% reported company-sponsored tuition for their employees. Employee participation from this group ranged from 0 to 90 percent, with an average participation rate of 13%.

COMMUTING DISTANCE

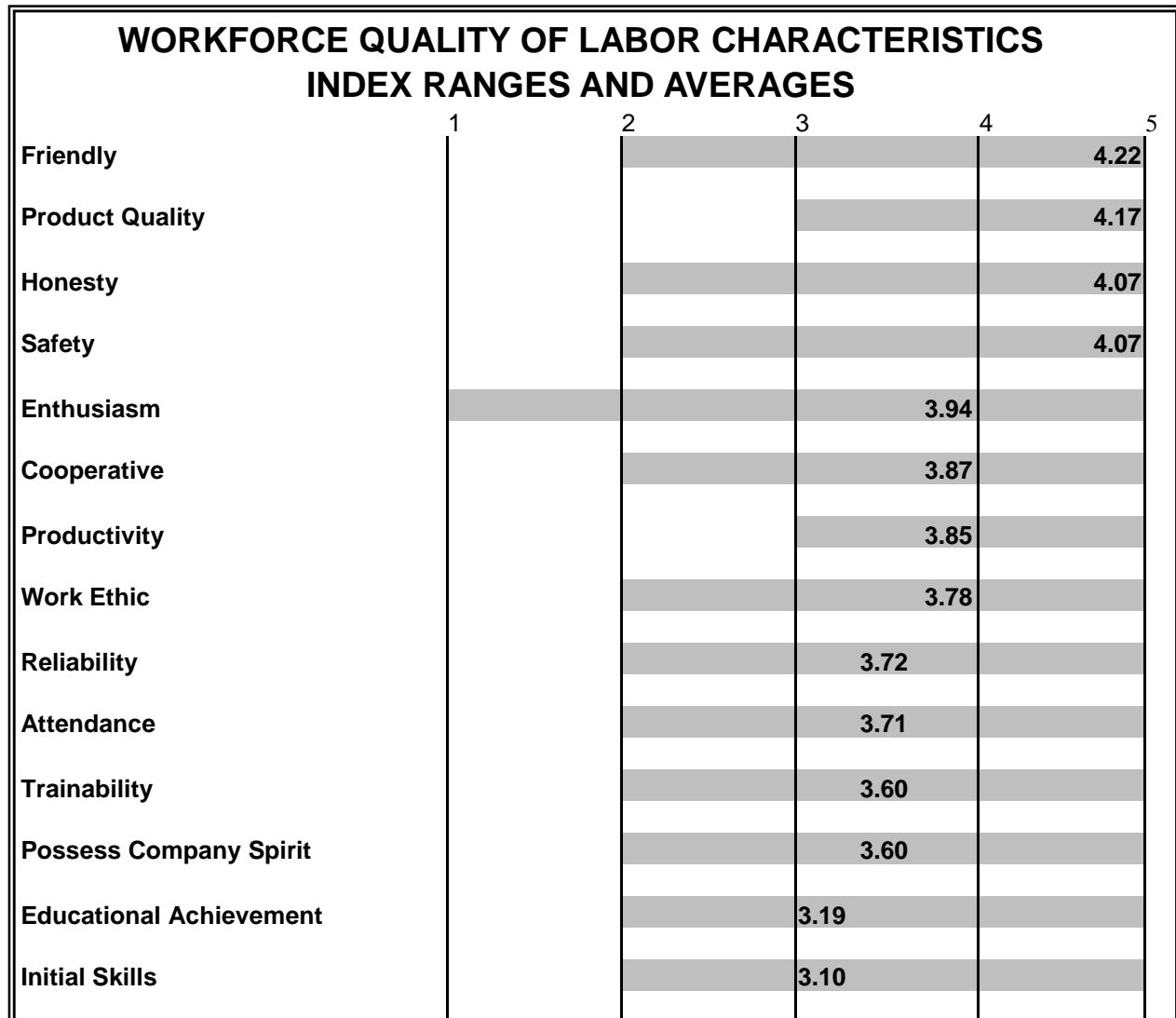
On average, employers report 54% of the employees live within 10 miles of their place of work. Another 34% commute from 11-30 miles to work. Only 12% commute 31 or more miles to work.



B. QUALITY OF LABOR CHARACTERISTICS:

Fourteen quality of labor characteristics were ranked by employers on a scale of one (very poor) to five (very good). A rating of 3 is considered average.

Friendly, Product Quality, Honesty and Safety received 4.00 or better average scores. Educational Achievement and Initial Skills were ranked lowest with an average score of 3.20 and 3.00, while Friendly received the highest score: (one-fourth of the firms ranked it very good).



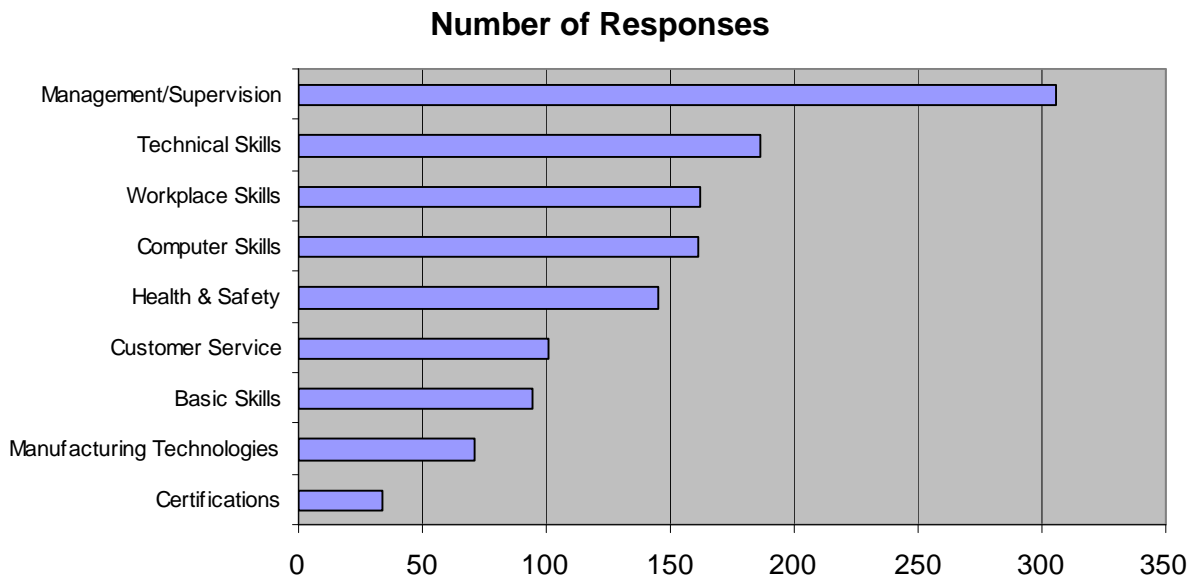
Twelve of the 14 characteristics had average ratings of 3.60 or better and none were below 3.10, both ratings are considered good ratings. Only one of the characteristics received firm rankings below 2.0 while all 14 characteristics included rankings of 5 (very good). The shaded area represents the range of the responses from employers of 1 to 5.

C. SKILLS TRAINING NEEDS

The skills and training needs (listed on pages 5 & 6) was completed by 80 of the 86 responding employers. Of the 87 specific skills in nine (9) Skill Category Groups, employers selected 1260 skills as specific needs for their organizations

Employers had the greatest interest for training and skills listed in the Management/Supervision group with 306 responses and Technical Skills group with 186 responses. These more technical or advanced skills would normally be required by larger operations and more in the goods producing or manufacturing related industries.

Employers Training Need By Skills Category	
Skills Category Group	Number Responses
Management/Supervision	306
Technical Skills	186
Workplace Skills	162
Computer Skills	161
Health & Safety	145
Customer Service	101
Basic Skills	94
Manufacturing Technologies	71
Certifications	34
Total	1260



The specific skill with the most interest is Teamwork with 36 responses in the Management/Supervision Group (see pages 5 & 6). Spreadsheets (with 35 responses in the Computer Skills Group) is second, followed by Conflict Resolution for third in the Management / Supervision Group.

SKILLS TRAINING NEEDS

SPECIFIC SKILL NEEDS IN DESCENDING ORDER

Specific Skill	Employer Skill Category	Number Responses	Percentage Total Respondent	Percentage Training Respondents
Team Leadership	MS	36	41.9%	45.0%
Spreadsheets	CP	35	40.7%	43.8%
Conflict Resolution	MS	32	37.2%	40.0%
CPR/First Aid	HS	31	36.0%	38.8%
Employee Evaluation	MS	31	36.0%	38.8%
Math	BS	30	34.9%	37.5%
Customer Service	CS	30	34.9%	37.5%
Problem Solving	WS	30	34.9%	37.5%
OSHA/Regulatory Training	HS	29	33.7%	36.3%
Team Building	MS	29	33.7%	36.3%
Communication	MS	28	32.6%	35.0%
Connecting with Customers	CS	25	29.1%	31.3%
Industrial Safety	HS	25	29.1%	31.3%
Critical Thinking	WS	25	29.1%	31.3%
GED	BS	24	27.9%	30.0%
Coaching	MS	24	27.9%	30.0%
Intro to Computers	CP	23	26.7%	28.8%
Giving/Receiving Feedback	MS	22	25.6%	27.5%
Interviewing	MS	20	23.3%	25.0%
Lean Manufacturing	MT	20	23.3%	25.0%
Word Processing	CP	19	22.1%	23.8%
Stress Management	HS	19	22.1%	23.8%
English as a Second Language	BS	18	20.9%	22.5%
Wellness Programs	HS	18	20.9%	22.5%
Preventative Maintenance	MT	18	20.9%	22.5%
Databases	CP	17	19.8%	21.3%
Resolving Customers Issues	CS	17	19.8%	21.3%
Production/Inventory Control	TS	17	19.8%	21.3%
Project Management	WS	16	18.6%	20.0%
Teamwork	WS	16	18.6%	20.0%
HR Legal Requirements	MS	15	17.4%	18.8%
CAD/CAM	TS	15	17.4%	18.8%
Listening	WS	15	17.4%	18.8%
Clerical Skills	CS	14	16.3%	17.5%
Strategic Planning	MS	14	16.3%	17.5%
Manufacturing Processes	MT	14	16.3%	17.5%
Equipment Operator	TS	14	16.3%	17.5%
Diversity Issues	MS	13	15.1%	16.3%
Automated Manufacturing	TS	13	15.1%	16.3%
Fork Lift Operator	TS	13	15.1%	16.3%

Skills Category Groups

- | | |
|---------------------------------|-----------------------------|
| CP – Computer Skills | CS – Customer Service |
| BS – Basic Skills | CE – Certifications |
| TS – Technical Skills | TS – Technical Skills |
| HS – Health & Safety | WS – Workplace Skills |
| MT – Manufacturing Technologies | MS – Management/Supervision |

*Percent based on Total Respondents of 86

** Percent based on Training Respondents of 80

SKILLS TRAINING NEEDS (cont.)
SPECIFIC SKILL NEEDS IN DESCENDING ORDER

Specific Skill	Employer Skill Category	Number Responses	Percentage Total Respondent	Percentage Training Respondents
Mechanical Skills	TS	13	15.1%	16.3%
Programmable Logic Controllers	TS	13	15.1%	16.3%
Reading	BS	12	14.0%	15.0%
PowerPoint	CP	12	14.0%	15.0%
Hospitality Skills	CS	12	14.0%	15.0%
Marketing	MS	12	14.0%	15.0%
Recognition	MS	12	14.0%	15.0%
CNC	TS	12	14.0%	15.0%
Machinery Maintenance	MT	11	12.8%	13.8%
Time Management	WS	11	12.8%	13.8%
Office Skills	BS	10	11.6%	12.5%
Keyboarding/Data Entry	CP	10	11.6%	12.5%
HAZMAT	HS	10	11.6%	12.5%
Substance Abuse	HS	10	11.6%	12.5%
Machining	TS	10	11.6%	12.5%
Welding	TS	10	11.6%	12.5%
E-mail	CP	9	10.5%	11.3%
Internet Proficiency	CP	9	10.5%	11.3%
Blueprint Reading	TS	9	10.5%	11.3%
Industrial Electricity	TS	9	10.5%	11.3%
Costs of Services/Production	WS	9	10.5%	11.3%
Web Page Development	CP	8	9.3%	10.0%
Reading Financial Statements	MS	8	9.3%	10.0%
Quality Product Planning	MT	8	9.3%	10.0%
Electronics	TS	8	9.3%	10.0%
Statistical Process Control (SPC)	TS	8	9.3%	10.0%
Truck Driver	TS	8	9.3%	10.0%
Programming	CP	7	8.1%	8.8%
ISO	CE	6	7.0%	7.5%
Lean Mfg Belt Certifications	CE	6	7.0%	7.5%
Networking	CP	6	7.0%	7.5%
Pricing	MS	6	7.0%	7.5%
Hydraulics	TS	6	7.0%	7.5%
E-commerce	CP	5	5.8%	6.3%
Business Plans	MS	5	5.8%	6.3%
HAZWHOPPER (8hrs)	CE	4	4.7%	5.0%
Microsoft Certified Professionals	CE	4	4.7%	5.0%
Mistake Proofing	CE	4	4.7%	5.0%
Calibration	TS	4	4.7%	5.0%
APICS CPIM	CE	3	3.5%	3.8%
HAZWHOPPER (40hrs)	CE	3	3.5%	3.8%
Foreign Language Basics	CS	3	3.5%	3.8%
HACCP	HS	3	3.5%	3.8%
Refrigeration	TS	3	3.5%	3.8%
ASQC Certifications	CE	2	2.3%	2.5%
Cisco Networking Systems (CCNA)	CE	2	2.3%	2.5%
HVAC	TS	1	1.2%	1.3%

Skills Category Groups

CP – Computer Skills
 BS – Basic Skills
 TS – Technical Skills
 HS – Health & Safety

CS – Customer Service
 CE – Certifications
 TS – Technical Skills
 MS – Management/Supervision

*Percent based on Total Respondents of 86
 ** Percent based on Training Respondents of 80
 WS – Workplace Skills
 MT – Manufacturing Technologies

D. EMPLOYMENT & PRODUCTIVITY

The Employment and Productivity section relate generally to employment related issues. Employer issues in recruiting and retaining talent are the keys to Productivity. Productivity is influenced by a number of factors ranging from training and turnover to drug testing, available skills and more.

FORMAL TRAINING PROGRAMS

Sixty-four percent (64%) of the firms responding to the survey have a formal training program.

Of those responding to having a formal training program, 79% have company staff conduct the training with 12% by outside vendors, 9% by college and tech schools and over 30% utilizing a combination of approaches.

*QUESTION: DOES YOUR COMPANY HAVE A FORMAL TRAINING PROGRAM?
IF YES WHO CONDUCTS TRAINING?*

EMPLOYEE DRUG TESTING

Fifty-five, or 64%, of all responding companies conduct drug testing either during pre-employment screening or on a random basis. Forty-five percent (45%) who do drug testing do both pre-employment and random testing.

QUESTION: DOES YOUR CONDUCT EMPLOYEE DRUG TESTING?

EMPLOYMENT PROSPECTS IN ONE YEAR

Most employers in Franklin County anticipate the employment prospects for the next year to remain steady with 41% of the employers projecting an increase and only 2.4% a decrease. The remaining employers were neutral with employment levels remaining the same. Manufacturers were the most optimistic with 51.2% anticipating an increase.

QUESTION: ONE YEAR FROM NOW, DO YOU ANTICIPATE THE TOTAL NUMBER OF EMPLOYEES AT YOUR BUSINESS WILL: INCREASE, DECREASE OR REMAIN STEADY?

OUTSOURCING TRENDS TO VENDORS AND SUPPLIERS

Business Function	Some	All	None
Training	42.8%	3.6%	53.6%
Maintenance	48.3%	8.2%	43.5%
Accounting	50.6%	2.4%	47.0%
Components for Assembly	30.9%	0%	69.1%
Personnel	20.0%	0%	80.0%

NOTE: Three columns across total 100%.

The two functions outsourced most are Accounting and Maintenance. Personnel activities are outsourced the least. Thirty-one of all respondents bought some outside components for final assembly of their products. Since this is a manufacturing function it would indicate that about 55% of Manufacturers outsource for components. Ninety-four percent (94%) of the respondents expect outsourcing to remain about the same.

QUESTION: WHAT INTERNAL BUSINESS FUNCTIONS ARE YOU CURRENTLY OUTSOURCING TO OTHER VENDORS AND SUPPLIERS?

PRE-EMPLOYMENT TESTING

Forty-one percent of the responding employers indicated they require pre-employment testing. Fifty-nine percent of employers with 100 or more employees require testing.

The participation rate in the four areas of testing are:

Skills	26.7%
Mental Abilities	10.1%
Integrity	10.0%
Personality	7.2%

QUESTION: DO YOU REQUIRE ANY PRE-EMPLOYMENT TESTING? YES NO
IF YES, WHAT KIND? SKILLS, ABILITIES, PERSONALITY, INTEGRITY.

USAGE OF TEMPORARY WORKERS

Twenty-two percent of all respondents indicated a constant or frequent use of temporary workers with Manufacturers having the highest usage. Education is the second highest user of temporary workers.

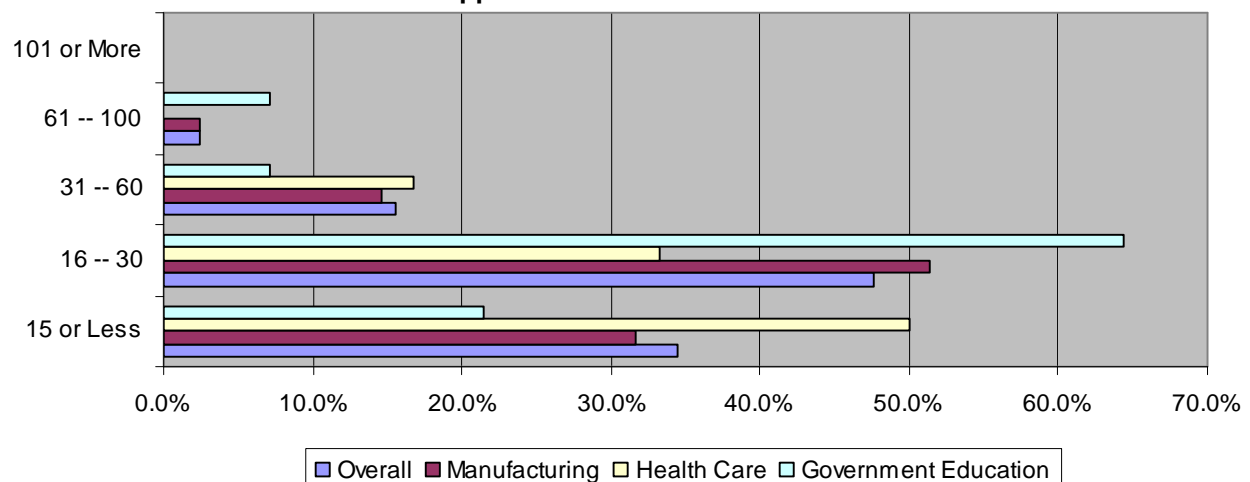
APPLICATIONS TO FILL PRODUCTION POSITIONS

Nearly Thirty-four (34) percent of the firms indicated that less than 15 applicants would fill five production level positions. 48 (66) percent preferred between 16 and 30 applicants and only five firms indicated a preference of more than 30 applicants.

QUESTION: IF YOUR COMPANY HAD FIVE PRODUCTION WORKER POSITIONS TO FILL, YOUR COMPANY WOULD HAVE TO CHECK OR SCREEN HOW MANY APPLICANTS?

Applications	Overall	Manufacturing	Health Care	Government Education
15 or Less	34.5%	31.7%	50.0%	21.4%
16 -- 30	47.6%	51.3%	33.3%	64.4%
31 -- 60	15.5%	14.6%	16.7%	7.1%
61 -- 100	2.4%	2.4%	0.0%	7.1%
101 or More	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%

Number of Applications to Fill Production Positions

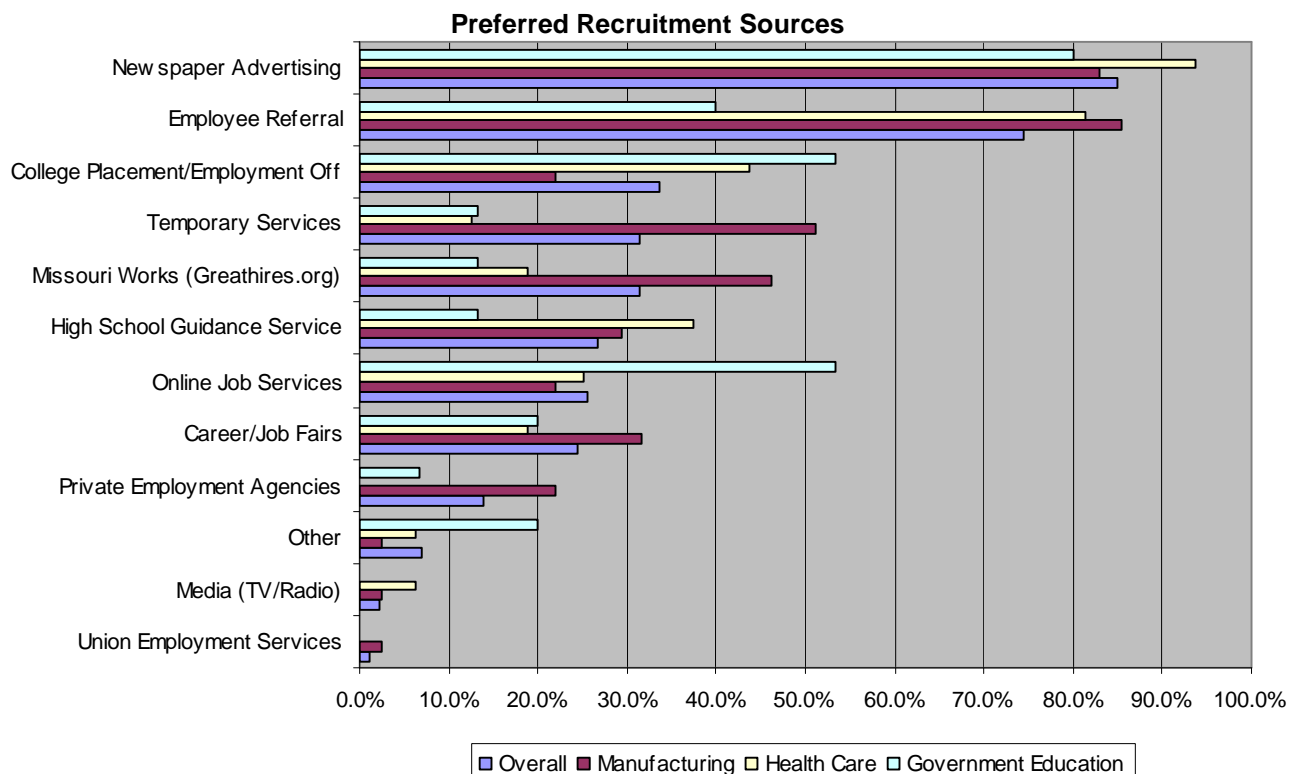


PREFERRED RECRUITMENT SOURCES

Newspaper Advertising and Employee Referral are the preferred sources for applicants by employers overall with College Placement third and Missouri Works fourth. The other sources have various preferences among the employer groups. Health Care and Government/Education utilize College Placement more than employers overall. Government/Education utilizes Online Job Services more than other employer groups. Temporary Services continues moving up in preference by all employer groups with the exception of government from previous studies.

QUESTION: WHEN HIRING NEW EMPLOYEES, WHICH OF THE FOLLOWING DO YOU USE?

Recruitment Sources	Overall	Manufacturing	Health Care	Government Education
Newspaper Advertising	84.9%	82.9%	93.8%	80.0%
Employee Referral	74.4%	85.4%	81.3%	40.0%
College Placement/Employment Off	33.7%	22.0%	43.8%	53.3%
Missouri Works (Greathires.org)	31.4%	46.3%	18.8%	13.3%
Temporary Services	31.4%	51.2%	12.5%	13.3%
High School Guidance Service	26.7%	29.3%	37.5%	13.3%
Online Job Services	25.6%	22.0%	25.0%	53.3%
Career/Job Fairs	24.4%	31.7%	18.8%	20.0%
Private Employment Agencies	14.0%	22.0%	0.0%	6.7%
Other	7.0%	2.4%	6.3%	20.0%
Media (TV/Radio)	2.3%	2.4%	6.3%	0.0%
Union Employment Services	1.2%	2.4%	0.0%	0.0%
Totals	302.0%	400.0%	343.8%	313.3%



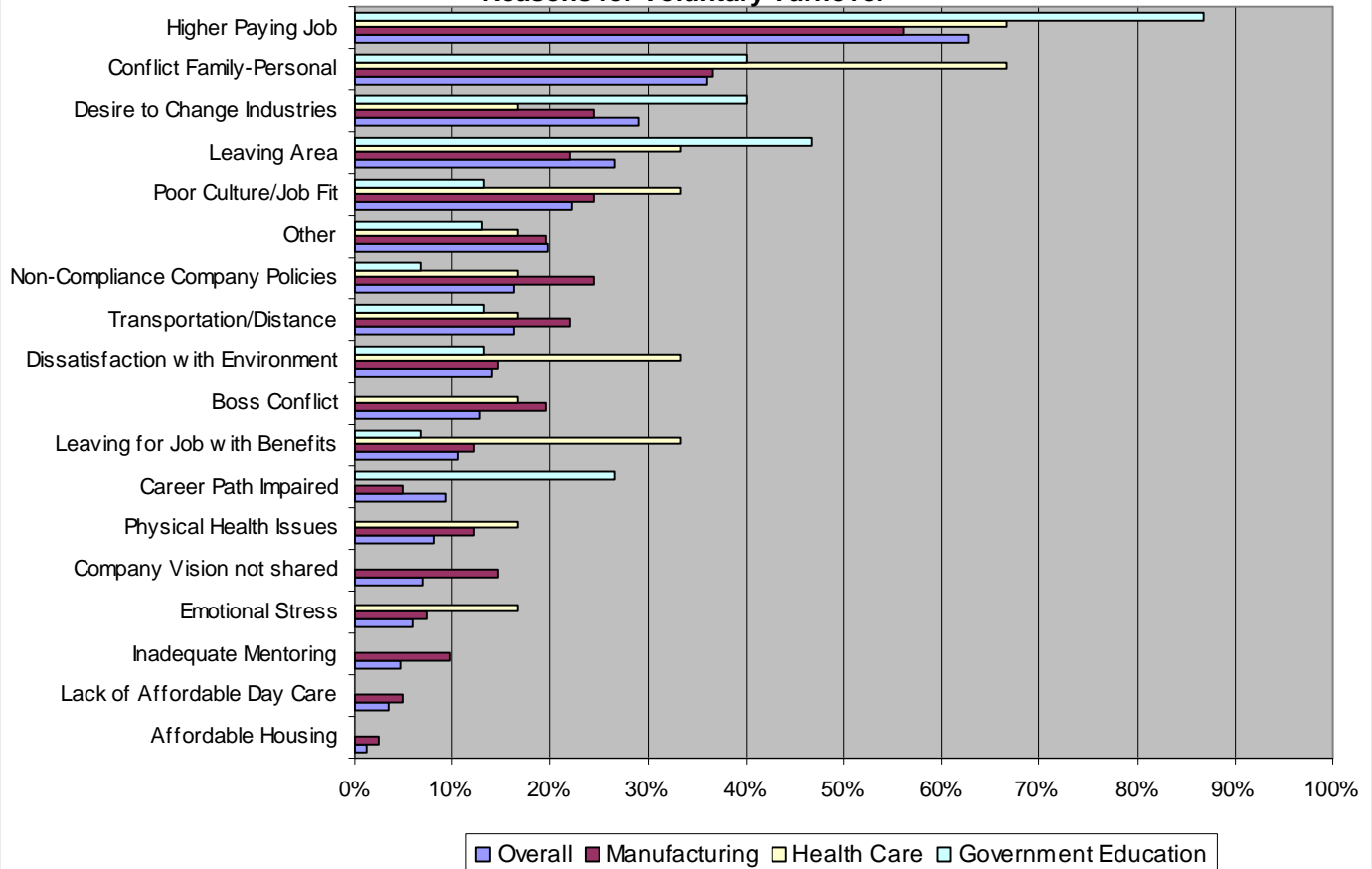
REASONS FOR TURNOVER

The major reason for leaving a job was a higher paying job, followed by conflict with family and personal obligations and desire to change industries. Other reasons for voluntary turnover were leaving area, poor culture/job fit and transportation/distance. The Other category had the large majority of comments listed as retirement.

QUESTION: WHAT ARE THE 3 PRIMARY REASONS GIVEN FOR VOLUNTARY TURNOVER AT YOUR ORGANIZATION?

Turnover Reasons	Overall	Manufacturing	Health Care	Government Education
Higher Paying Job	62.8%	56.1%	66.7%	86.7%
Leaving Area	26.7%	22.0%	33.3%	46.7%
Conflict Family-Personal	36.0%	36.6%	66.7%	40.0%
Transportation/Distance	16.3%	22.0%	16.7%	13.3%
Non-Compliance Company Policies	16.3%	24.4%	16.7%	6.7%
Desire to Change Industries	29.1%	24.4%	16.7%	40.0%
Poor Culture/Job Fit	22.1%	24.4%	33.3%	13.3%
Physical Health Issues	8.1%	12.2%	16.7%	0%
Other	19.8%	19.5%	16.7%	13.0%
Leaving for Job with Benefits	10.5%	12.2%	33.3%	6.7%
Dissatisfaction with Environment	14.0%	14.6%	33.3%	13.3%
Emotional Stress	5.8%	7.3%	16.7%	0%
Company Vision not shared	7.0%	14.6%	0%	0%
Boss Conflict	12.8%	19.5%	16.7%	0%
Career Path Impaired	9.3%	4.9%	0%	26.7%
Lack of Affordable Day Care	3.5%	4.9%	0%	0%
Inadequate Mentoring	4.7%	9.8%	0%	0%
Affordable Housing	1.2%	2.4%	0%	0%
Totals	305.8%	331.7%	383.3%	306.7%

Reasons for Voluntary Turnover

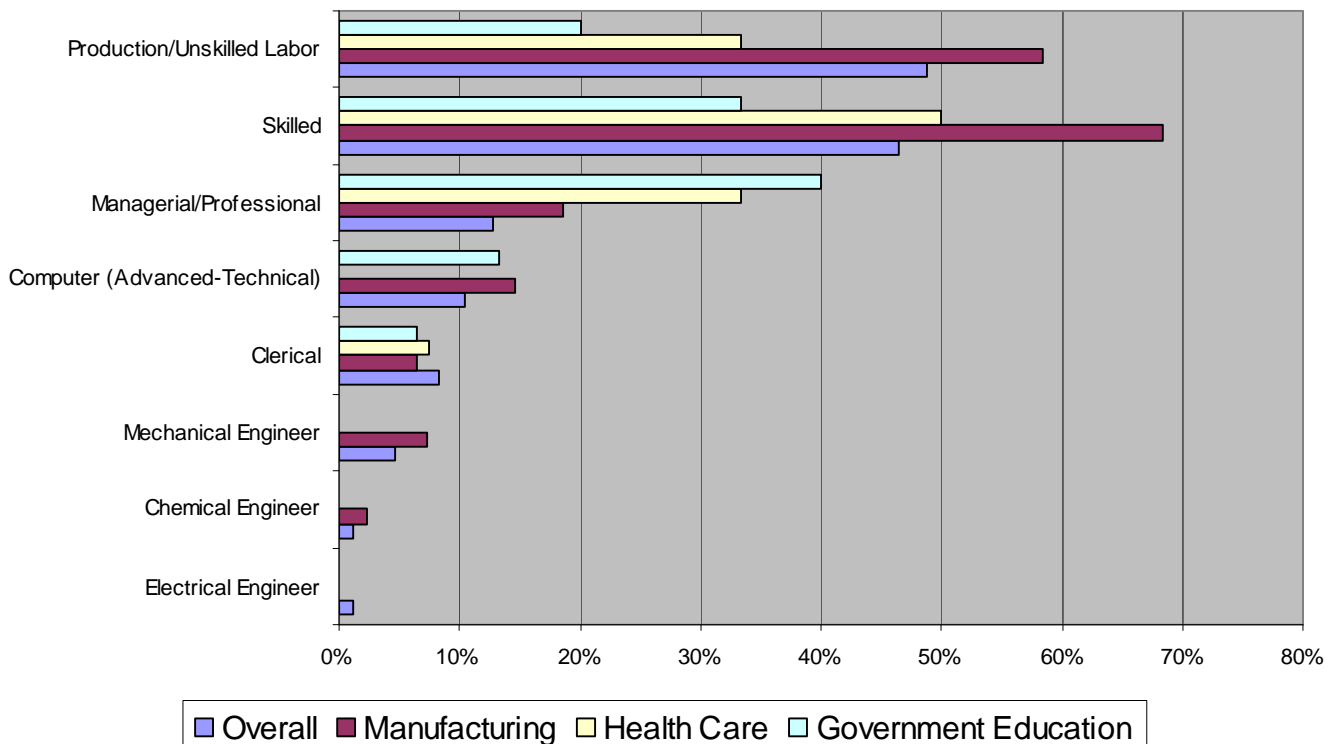


LABOR SHORTAGES

Overall, the Production/Unskilled category was listed as the most serious in the labor shortage area by employers. Manufacturers and Health Care employers indicated the greatest concerns with both the Skilled and the Production/Unskilled areas. Managerial/Professional was listed third by all except the Government/Education group which listed it as the greatest concern.

QUESTION: IN WHAT AREAS ARE YOU EXPERIENCING LABOR SHORTAGE PROBLEMS?

Shortage Areas	Overall	Manufacturing	Health Care	Government Education
Production/Unskilled Labor	48.80%	58.50%	33.30%	20.00%
Skilled	46.50%	68.30%	50.00%	33.30%
Managerial/Professional	12.80%	18.60%	33.30%	40.00%
Computer (Advanced-Technical)	10.50%	14.60%	0%	13.30%
Clerical	8.30%	6.40%	7.50%	6.40%
Mechanical Engineer	4.70%	7.30%	0	0
Electrical Engineer	1.20%	0	0	0
Chemical Engineer	1.20%	2.40%	0	0
Totals	127.90%	153.70%	116.70%	106.70%



RECRUITMENT OF TALENT TO THE AREA

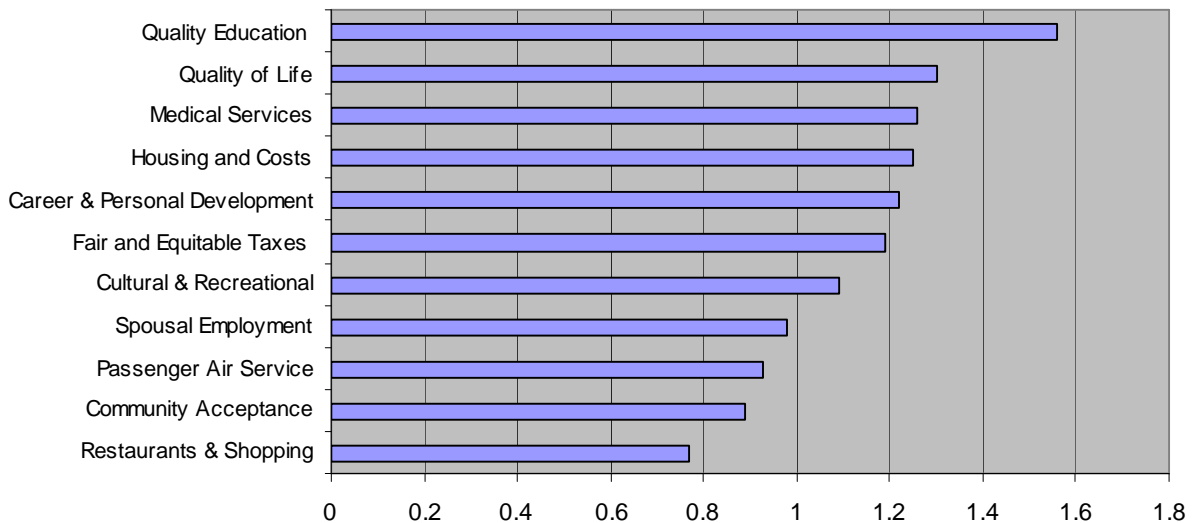
The perceptions of employers on various local factors and Quality of Life issues are important when attracting talent to an area for employment. The strength or weakness of a factor is many times in the eyes of the beholder. However, by going to a broad base of employers from different sizes and industries an index can be established whether a factor is a strength or a weakness. This index can be used for comparison to determine whether a factor is a strength or weakness and how it compares to a location or type of industry.

The top four factors for Franklin County, Missouri starting from the top are: "Quality Education" 1.56; "Quality of Life" 1.30; "Medical Services" 1.28; and "Housing and Costs" 1.25. The one with lowest index is "Restaurants & Shopping" .77 followed by "Community Acceptance" .89.

Generally, employers with 250 or more employees deviated more than the overall and other groups on both the up and the down side of the factors. On the strength side large employers considered Housing, Taxes, Medical Services, Career and Personal Development and Education real pluses. On the weakness side, large employers considered Restaurants & Shopping, Community Acceptance and Cultural & Recreational factors weaker than employers overall. All groups ranked Education as the community's greatest strength and were uniform and consistent in their ranking.

QUESTION: WHEN RECRUITING MANAGERIAL, PROFESSIONAL OR HIGHLY SKILLED EMPLOYEES FROM OUTSIDE YOUR AREA, HOW DO THE FOLLOWING INFLUENCE RELOCATION DECISIONS? (Is the factor a (S) strength, (W) weakness or (N) normal/neutral)

Recruitment Factors



RECRUITMENT FACTORS FOR FRANKLIN COUNTY	
Factor	Index
Quality Education	1.56
Quality of Life	1.30
Medical Services	1.26
Housing and Costs	1.25
Career & Personal Development	1.22
Fair and Equitable Taxes	1.19
Cultural & Recreational	1.09
Spousal Employment	0.98
Passenger Air Service	0.93
Community Acceptance	0.89
Restaurants & Shopping	0.77

Recruiting Factors for High Level and Skilled Personnel

Based on Employer Perceptions As Strength, Weakness and Neutral

Quality Education		Index	Cultural & Recreational		Index
Overall (Franklin County)		1.56	Overall (Franklin County)		1.09
Employers, Over 250 Employees		1.54	Employers, Over 250 Employees		0.85
Manufacturing Employers		1.55	Manufacturing Employers		1.10
Health/Education/Government		1.56	Health/Education/Government		1.00

Quality of Life		Index	Spousal Employment		Index
Overall (Franklin County)		1.30	Overall (Franklin County)		0.98
Employers, Over 250 Employees		1.33	Employers, Over 250 Employees		0.85
Manufacturing Employers		1.48	Manufacturing Employers		1.00
Health/Education/Government		1.50	Health/Education/Government		0.81

Medical Services		Index	Passenger Air Service		Index
Overall (Franklin County)		1.28	Overall (Franklin County)		0.93
Employers, Over 250 Employees		1.38	Employers, Over 250 Employees		1.00
Manufacturing Employers		1.27	Manufacturing Employers		0.93
Health/Education/Government		1.31	Health/Education/Government		1.00

Housing and Costs		Index	Community Acceptance		Index
Overall Franklin County*		1.25	Overall (Franklin County)		0.89
Employers, Over 250 Employees**		1.38	Employers, Over 250 Employees		0.77
Manufacturing Employers***		1.17	Manufacturing Employers		0.83
Health/Education/Government****		1.56	Health/Education/Government		0.87

Career & Personal Development		Index	Restaurants & Shopping		Index
Overall (Franklin County)		1.22	Overall (Franklin County)		0.77
Employers, Over 250 Employees		1.46	Employers, Over 250 Employees		0.67
Manufacturing Employers		1.28	Manufacturing Employers		0.79
Health/Education/Government		1.13	Health/Education/Government		0.56

Fair and Equitable Taxes		Index	
Overall (Franklin County)		1.19	*Respondents Franklin County Only
Employers, Over 250 Employees		1.31	**Respondents 250 or more Employees
Manufacturing Employers		1.24	***Respondents Manufacturing Employers
Health/Education/Government		1.19	****Respondents Health/Education/Government Employers

Multipliers: Weakness = 0, Normal = 1, Strength = 2

Rating Indexes: Over 1 Indicates Strength,
Under 1 Indicates Weaknesses,

IV. WORKFORCE COSTS

OVERVIEW

Workforce costs is one of the most important elements when evaluating a location for expansion or location. However, it isn't the only factor. Workforce quality and availability covered in other sections of this study are also key factors. With all other things being equal, a highly competitive labor cost structure is critical both domestically and in the global marketplace. Shopping the labor component is much easier when all components in the workforce study are part of the evaluation process.

The comparison feature in this study is made possible by utilizing the position descriptions from the Bureau of Labor Statistics (BLS). This allows wage data to be presented by type of occupation as defined, rather than by job title which varies widely by employer and industry. In a knowledge-based economy many professional and technical jobs no longer are unique to industry groupings and, therefore, must be competitive across industry lines. This is not necessarily true at the entry level where specific skills are required for certain industries. This allows developers and site decision makers to compare the local labor costs to various industry groups and to state and national labor markets.

The information in the Wage and Benefit section of the Employer Survey covers 47 occupations in the following key categories: (1) Management, (2) Professional/Technical, (3) Clerical, (4) Production/Maintenance, (5) Service, (6) Sales. The current market wage rates for the Franklin County Area Labor Market (ALM) compare favorably and are competitive with other state and national labor markets. While this survey data relates information for the Fall of 2006, the state and national data from the BLS has a 2005 time line for comparison. Since wage rates change from year to year -- normally to the upside -- the actual rates for the national markets may be from 0 up to 5 percent higher.

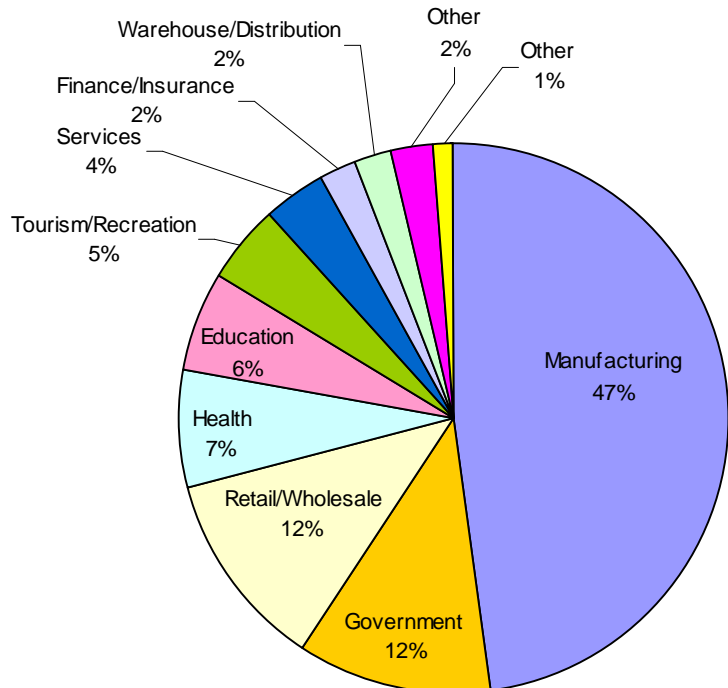
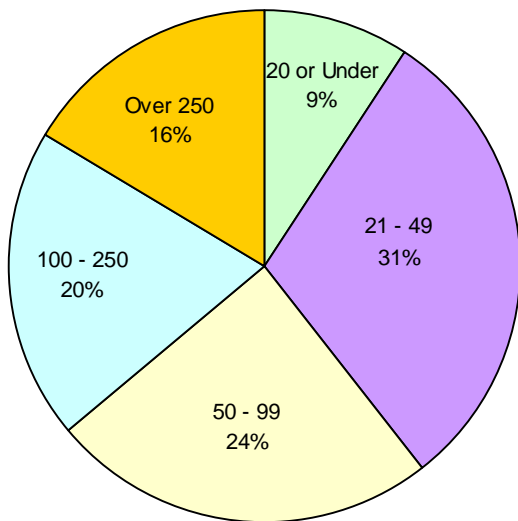
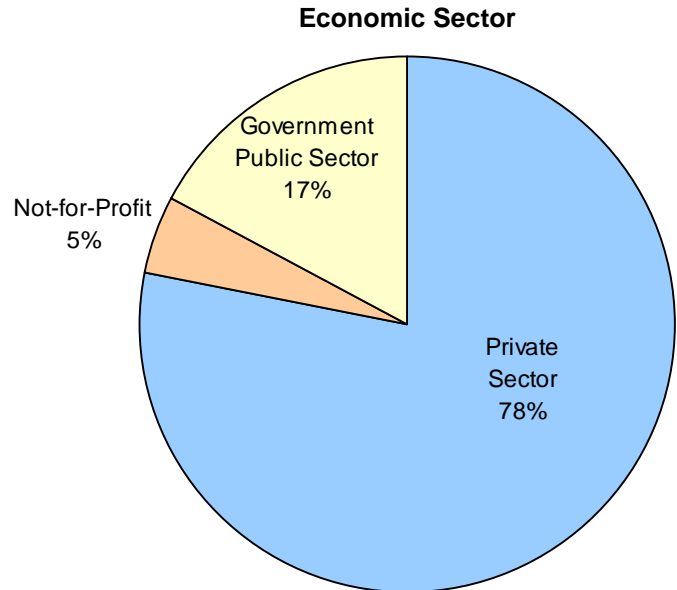
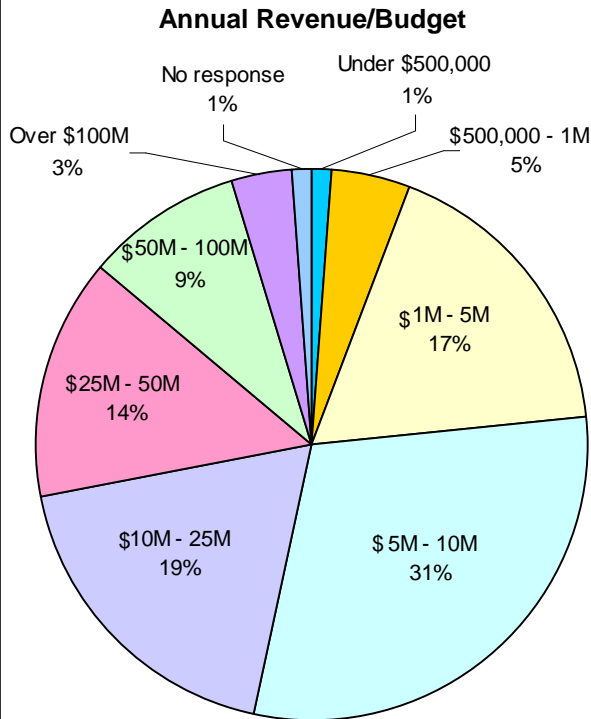
It is important to note that the information derived for this report could well be slightly different if the mix of respondents were different. Larger organizations or companies with more employees and revenue tend to have higher pay levels and more benefits, while smaller organizations and businesses tend to have lower pay levels and fewer benefits. This isn't always true, but has a high correlation. However, all businesses find they have to be competitive if they are to attract a competent and skilled workforce.

The Wage Compensation Summary provides both starting ranges and averages for companies to evaluate where they may be best able to attract the workforce and skills in the ALM. Further, the Wage Comparisons by occupation and market areas provide another way to determine costs and competitive forces. The trade-off to these costs for a productive workforce is the quality and availability of skills.

The final area covered in this section is the desired wages for workers considering new employment or making a job change. Since less than 10% of new hires for new operations come from the ranks of the unemployed, it is necessary to identify individuals who are working but who desire better jobs and who appear to possess the skills, education, and experience to qualify them for those better jobs.

The Benefits section is another large component of Workforce Costs and varies both to the industry and size of the company. Generally, the larger employer groups and the government/public sector provide the better overall benefit plans for their employees. The percent of total compensation going to the benefits side of compensation varies from no benefits or only those paid as part of the employer's mandated costs for Medicare and Social Security to up to 45 percent of total compensation.

The following four charts indicate the mix of respondents from Franklin County Employer Group by: "Type of Industry," "Number of Employees," "Annual Revenue or Budget" and "Economic Sector."



Number of Employees

Industry Type

BENEFIT PROGRAMS

A variety of benefit programs are made available to employees. All but 2 of 85 or 97.6% of the firms responding contribute or provide health insurance for its employees with 63 or 74% of the firms contributing better than 75 percent coverage. Over 65% of the firms provide some pension plan assistance to employees. Over 55% of the employers contribute 50% or more to dental insurance programs and 45% contribute to vision care programs.

Dependent coverage for health insurance is provided by 62% of the firms responding to the survey. Close to one-half of the firms provide dental insurance coverage and 27% provide group life insurance coverage for dependents.

EMPLOYER CONTRIBUTIONS BY BENEFIT CATEGORY

PLAN	Employer Contributions (%)					Dependent Coverage	
	100	75 to 99	50 to 74	1 to 49	None	Yes	No
Pension Plan	28.9%	3.6%	7.2%	25.3%	35.0%	5.8%	94.2%
Group Life Insurance	60.0%	11.8%	3.5%	9.4%	15.3%	26.9%	23.1%
Health Insurance	30.6%	43.5%	12.9%	10.6%	2.4%	62.2%	37.8%
Dental Insurance	22.4%	23.5%	10.6%	8.2%	35.3%	48.7%	51.3%
Vision Care	13.1%	17.9%	3.6%	10.7%	54.8%	34.3%	65.7%

A salary deduction plan (401K) is offered by 84% of the employers with 67% of those companies contributing to the plan. Employees are provided an average of 8.8 paid holidays per year.

Employers provide on average 27.2% in contributions to benefits as part of the total compensation package. This compares to the national average of 28.6%.

HOURLY WAGE

The overall average wage is \$14.95 and compares to the 2005 average hourly wage of: USA \$18.21; Missouri \$16.66; Chicago Metro \$19.74 Indianapolis \$17.78 and Minneapolis Metro \$21.07.* (See Section IV, Page 7).

The Wage Compensation Section represents 57.3% or 6,844 of the 11,954 total employees from the 61 responding firms.

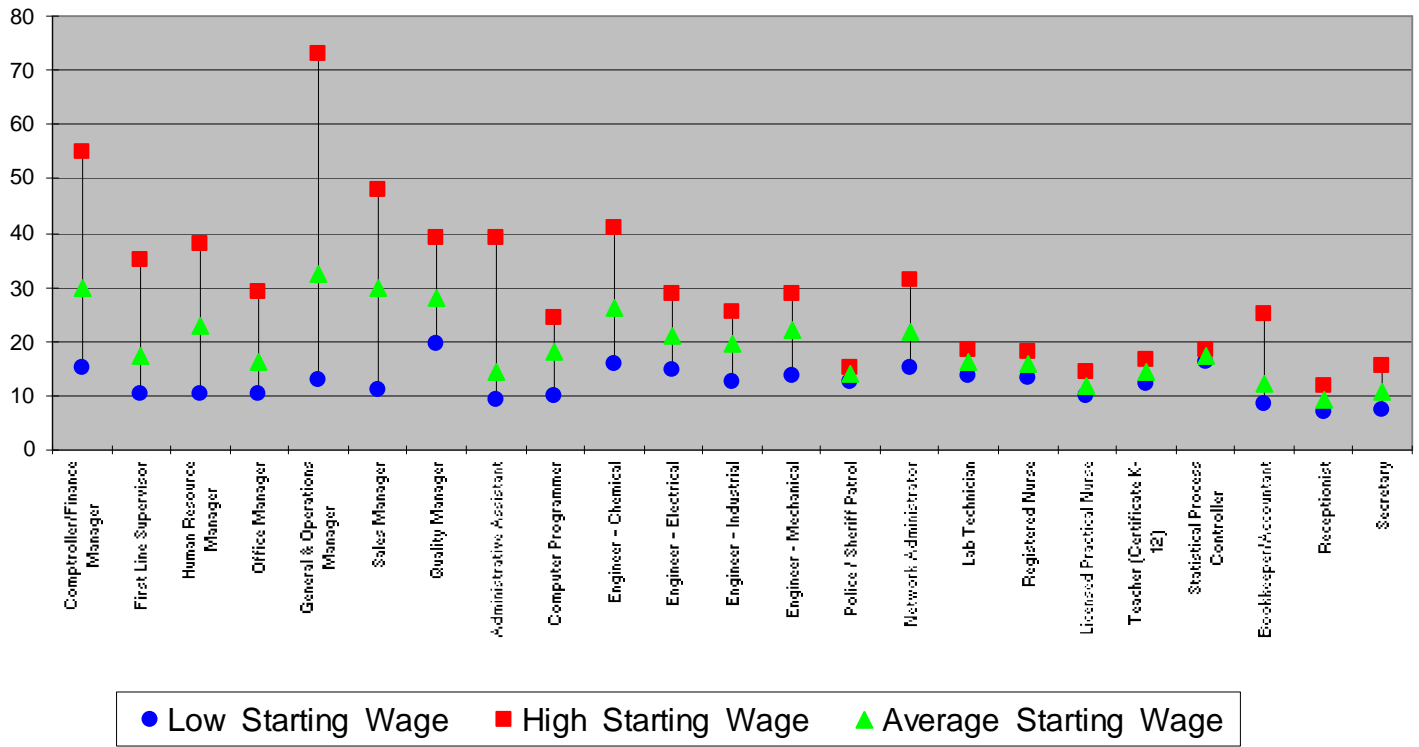
*Source: Bureau of Labor Statistics and the Missouri Department of Economic of Development.

WAGE COMPENSATION SUMMARY

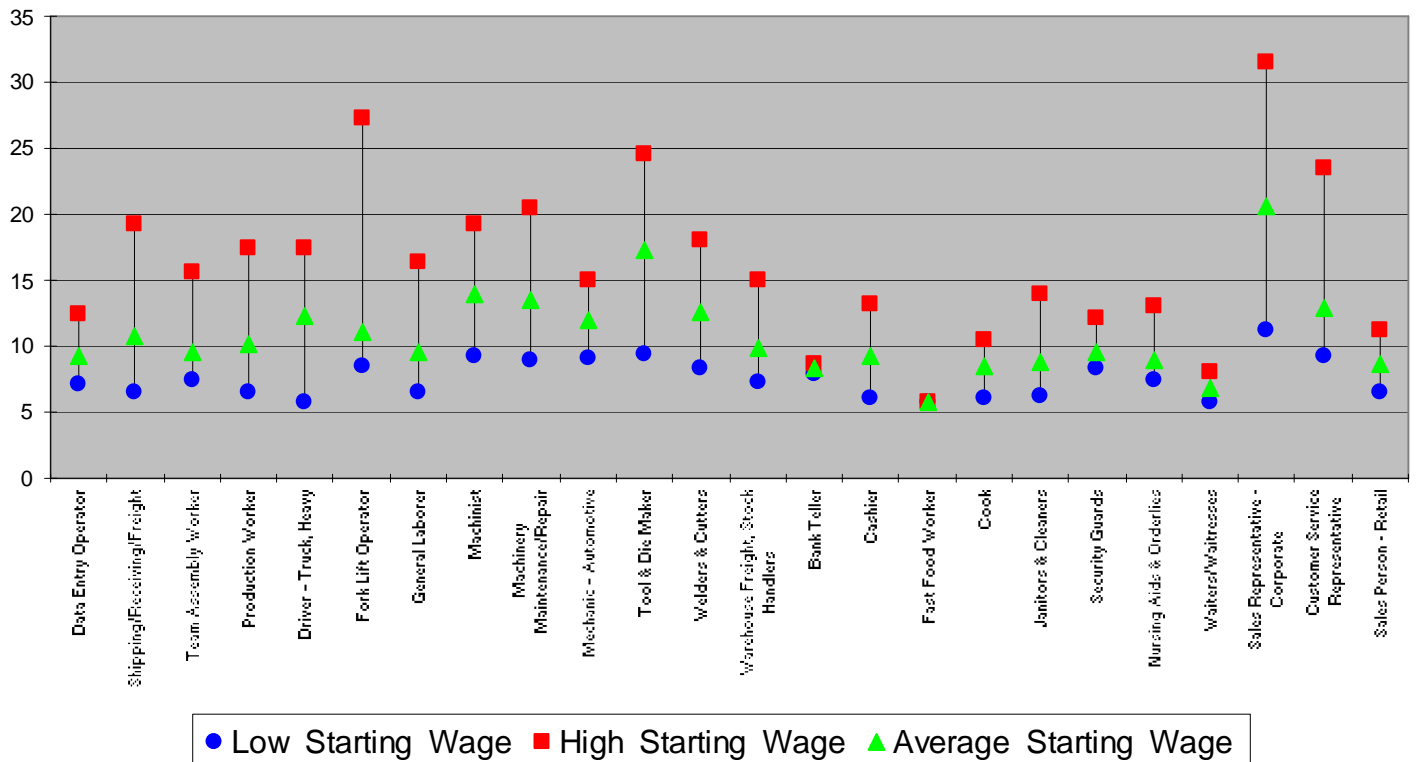
All wages have been weighted by employment level. There are wide ranges in both the starting and average wages. Frequently, the top wage is over two times the lowest wage. Yet the difference between the average starting wage and the overall average wage is generally less than four dollars. This section represents 57.3% or 6844 of the 11,954 total employees from the 86 responding firms. The listed job classifications are only a small portion of the hundreds available in any labor market.

Job Title	Low Starting Wage	High Starting Wage	Average Starting Wage	Low Average Wage	High Average Wage	Overall Average Wage	Number of Employees
Comptroller/Finance Manager	15.14	54.81	29.92	19.23	54.81	34.98	40
First Line Supervisor	10.20	35.00	17.22	13.00	46.63	21.41	164
Human Resource Manager	10.40	38.00	22.89	15.00	40.00	27.26	28
Office Manager	10.50	29.00	16.05	12.75	35.07	18.90	35
General & Operations Manager	12.80	73.00	32.47	14.20	73.00	39.10	52
Sales Manager	11.00	48.00	29.70	15.00	67.31	37.89	39
Quality Manager	19.50	39.10	27.88	21.63	46.15	33.83	11
Administrative Assistant	9.40	38.94	14.29	9.75	42.77	17.54	50
Computer Programmer	10.00	24.50	17.96	15.00	30.18	21.80	11
Engineer – Chemical	16.00	41.10	26.10	16.20	47.12	31.27	13
Engineer – Electrical	14.82	28.75	20.84	18.62	31.50	24.87	10
Engineer – Industrial	12.52	25.50	19.36	10.50	33.65	23.07	21
Engineer - Mechanical	13.62	28.81	22.03	14.79	40.88	27.28	68
Police / Sheriff Patrol	12.48	15.00	13.97	14.25	18.00	16.00	52
Network Administrator	15.00	31.20	21.73	16.88	35.71	25.21	12
Lab Technician	13.82	18.50	15.15	15.83	22.11	17.93	20
Registered Nurse	13.25	18.00	15.87	15.25	27.00	19.90	273
Licensed Practical Nurse	10.00	14.25	11.96	12.75	16.75	14.83	73
Teacher (Certificate K-12)	12.00	16.75	14.30	15.00	21.63	17.91	852
Statistical Process Controller	16.10	18.50	17.30	19.50	22.00	20.75	2
Bookkeeper/Accountant	8.50	25.10	12.33	9.61	27.98	14.27	73
Receptionist	7.00	11.90	9.29	9.00	16.83	11.36	73
Secretary	7.50	15.50	10.61	10.10	12.50	12.84	84
Data Entry Operator	7.10	12.50	9.22	9.00	15.00	11.48	36
Shipping/Receiving/Freight	6.50	19.20	10.76	8.00	24.13	13.19	111
Team Assembly Worker	7.50	15.60	9.56	8.68	19.58	11.07	927
Production Worker	6.50	17.50	10.12	8.20	21.25	12.58	1247
Driver – Truck, Heavy	5.75	17.50	12.23	5.36	22.25	14.04	90
Fork Lift Operator	8.50	27.27	11.04	9.50	27.27	12.61	125
General Laborer	6.50	16.30	9.58	8.25	17.90	12.14	425
Machinist	9.20	19.25	14.01	15.00	25.00	18.57	97
Machinery Maintenance/Repair	9.00	20.49	13.55	11.58	23.00	16.40	143
Mechanic – Automotive	9.10	15.00	12.00	16.83	18.00	17.42	21
Tool & Die Maker	9.40	24.50	17.25	13.25	27.75	21.21	37
Welders & Cutters	8.40	18.00	12.64	11.50	20.00	15.85	76
Warehouse Freight, Stock Handlers	7.21	15.00	9.87	8.00	17.00	11.92	196
Bank Teller	7.90	8.65	8.33	10.00	12.02	10.51	22
Cashier	6.08	13.25	9.19	6.55	19.23	10.35	20
Fast Food Worker	5.75	5.75	5.75	6.10	6.10	6.10	6
Cook	6.05	10.50	8.44	7.60	15.00	10.50	123
Janitors & Cleaners	6.15	13.90	8.74	7.25	15.41	10.32	224
Security Guards	8.40	12.14	9.52	10.00	13.50	11.74	241
Nursing Aids & Orderlies	7.50	13.00	8.96	8.10	17.00	10.43	223
Waiters/Waitresses	5.75	8.10	6.78	6.25	9.60	7.62	35
Sales Representative - Corporate	11.25	31.50	20.61	12.75	38.40	27.48	52
Customer Service Representative	9.30	23.50	12.94	11.00	31.20	15.90	113
Sales Person - Retail	6.50	11.25	8.69	8.55	16.65	12.58	98
						Total	6744

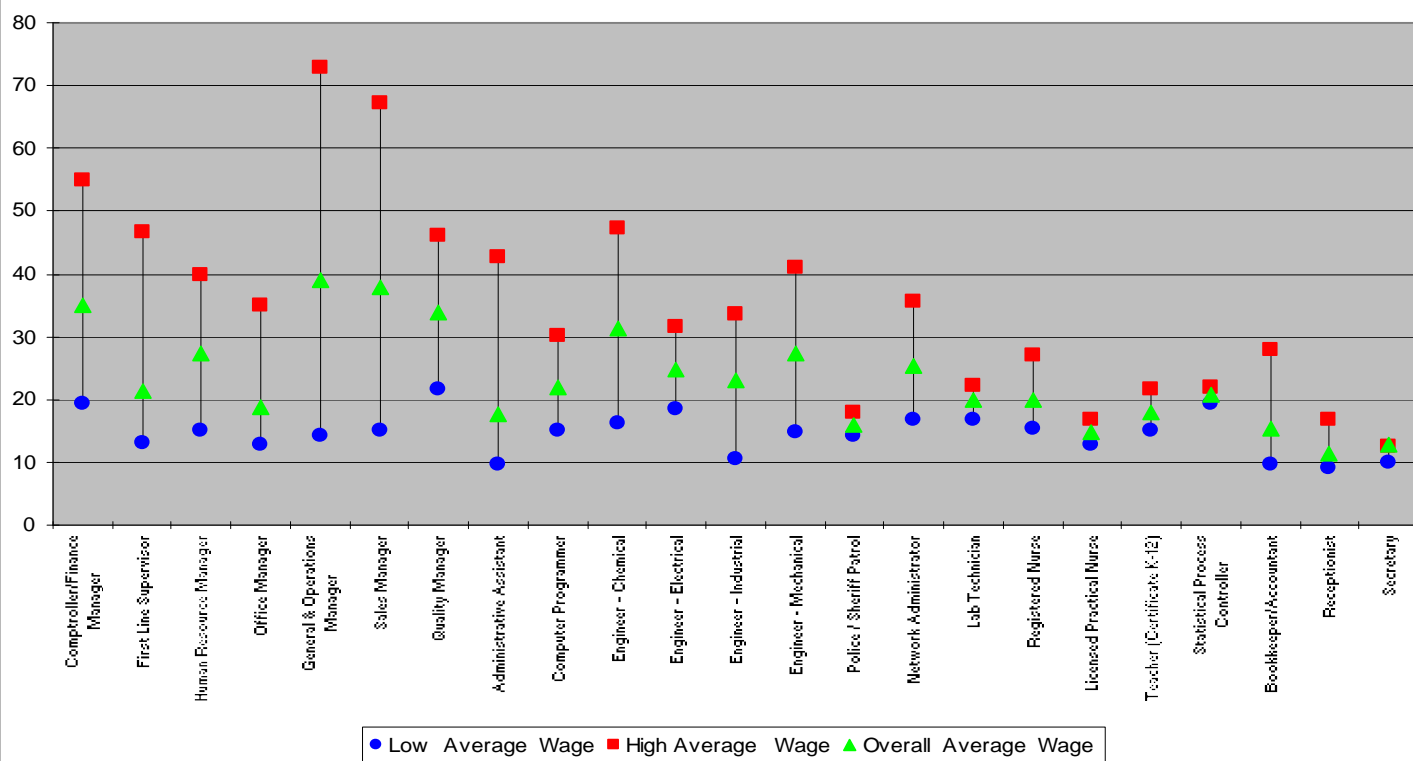
Starting and Average Starting Wages



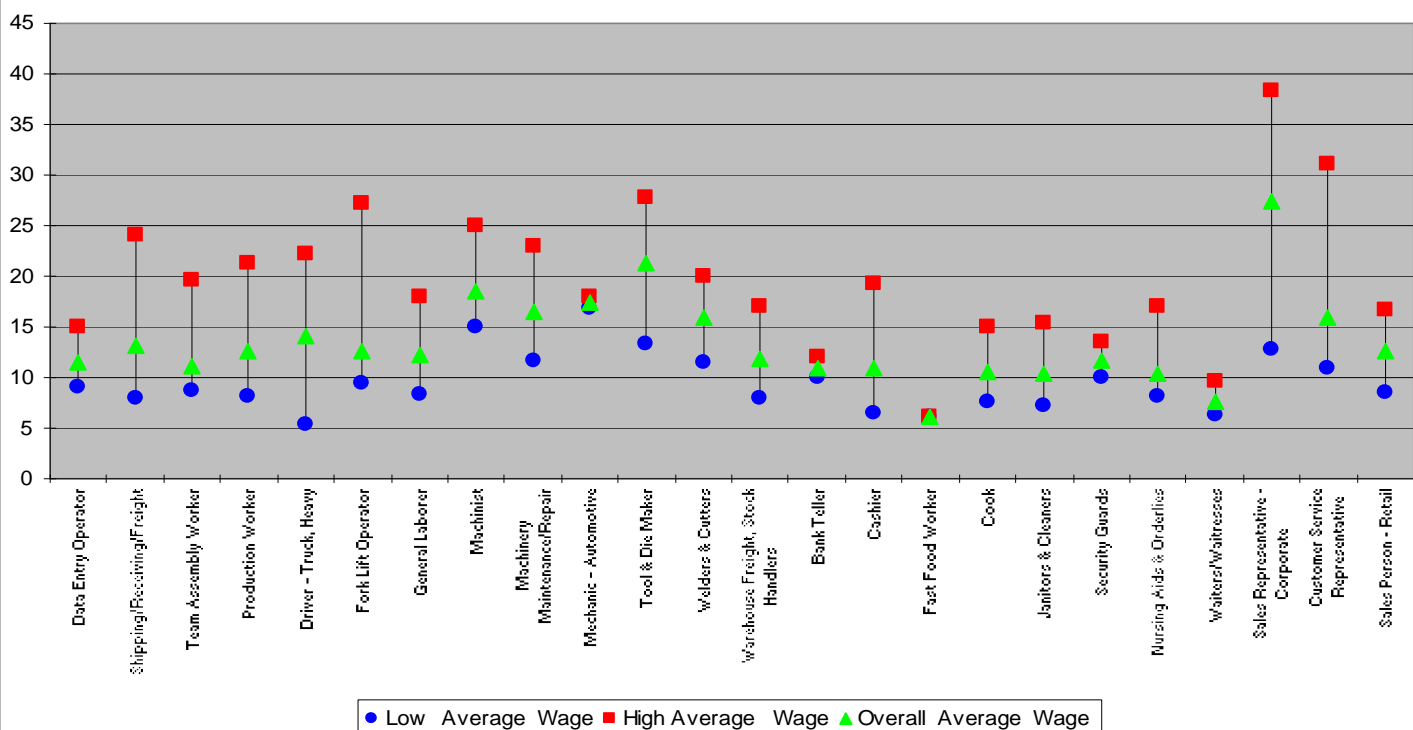
Starting and Average Starting Wages (continued)



Average Wage Comparisons



Average Wage Comparisons (continued)



FRANKLIN COUNTY AREA LABOR MARKET

Wage Rate Comparisons by Occupation and Market Areas

Job Title	Franklin County Employers Survey Average	Missouri	National	Atlanta	Chicago	Indianapolis	Minneapolis
Managers		Managers (Averages)					
Comptroller / Finance Manager/	\$34.98	\$44.32	\$46.45	\$45.74	\$47.14	\$46.69	\$52.93
First Line Supervisor	\$21.41	\$34.64	\$24.24	\$33.77	\$38.22	\$33.38	\$43.67
Human Resource Manager	\$27.26	\$40.26	\$43.24	\$43.88	\$38.92	\$33.13	\$48.19
Office Administrative Manager	\$18.90	\$31.31	\$33.44	\$33.54	\$30.74	\$30.32	\$37.54
General & Operations Manager	\$39.10	\$44.39	\$45.90	\$44.24	\$47.46	\$47.54	\$51.02
Sales Manager	\$37.89	\$49.75	\$47.36	\$43.74	\$47.64	\$45.79	\$54.66
Quality Production Manager	\$33.83	\$35.33	\$39.41	\$38.88	\$37.41	\$37.59	\$43.36
Professional/Technical		Professional/Technical (Averages)					
Administrative Assistant	\$17.54	\$17.75	\$18.18	\$18.31	\$18.55	\$17.65	\$19.09
Computer Programmer	\$21.80	\$29.44	\$32.40	\$35.68	\$31.50	\$28.43	\$32.88
Engineer - Chemical	\$31.27	\$36.70	\$38.09	\$35.84	\$33.31	\$49.85	\$34.29
Engineer - Electrical	\$24.87	\$33.11	\$36.57	\$36.03	\$34.86	\$29.91	\$37.42
Engineer - Industrial	\$23.07	\$33.25	\$32.93	\$32.70	\$31.93	\$31.72	\$34.84
Engineer - Mechanical	\$27.28	\$29.73	\$33.65	\$35.11	\$32.39	\$33.42	\$32.76
Police / Sheriff Patrol	\$16.00	\$17.26	\$22.73	\$18.76	\$28.32	\$22.34	\$24.98
Network Administrator	\$25.21	\$27.57	\$30.39	\$30.29	\$30.31	\$25.81	\$30.43
Lab Technician	\$17.93	\$13.84	\$13.94	\$15.39	\$17.60	\$16.51	\$17.51
Registered Nurse	\$19.90	\$24.35	\$27.35	\$25.66	\$27.24	\$25.65	\$30.01
Licensed Practical Nurse	\$14.83	\$15.09	\$17.41	\$16.32	\$18.23	\$17.98	\$18.31
Teacher(Certificate K-12)	\$17.91	\$18.64	\$23.17	\$22.87	\$26.63	\$21.03	\$22.36
Statistical Process Controller	\$20.75	\$20.94	\$21.15	\$17.69	\$21.88	\$19.77	\$23.91
Clerical		Clerical (Averages)					
Bookkeeper / Accountant	\$14.27	\$13.29	\$13.76	\$14.82	\$15.68	\$15.45	\$16.25
Receptionist	\$11.36	\$10.35	\$10.57	\$11.88	\$11.83	\$11.33	\$12.29
Secretary	\$12.84	\$13.04	\$13.35	\$13.12	\$13.83	\$13.48	\$16.30
Data Entry Operator	\$11.48	\$11.43	\$11.98	\$12.58	\$12.71	\$12.71	\$13.36
Shipping/Receiving/ Freight	\$13.19	\$11.86	\$12.80	\$13.07	\$22.69	\$11.37	\$14.41
Production/Maintenance		Production/Maintenance (Averages)					
Team Assembly Worker	\$11.07	\$13.74	\$12.50	\$11.76	\$11.13	\$13.73	\$13.87
Production Worker	\$12.58	\$13.78	\$14.37	\$13.96	\$14.41	\$15.42	\$16.27
Driver – Truck / Heavy	\$14.04	\$17.55	\$17.05	\$18.12	\$19.84	\$18.86	\$18.97
Fork Lift Operator	\$12.61	\$13.15	\$13.86	\$13.05	\$14.94	\$13.99	\$16.26
General Laborer	\$12.14	\$10.06	\$10.45	\$10.69	\$10.23	\$10.75	\$11.50
Machinist	\$18.57	\$16.11	\$17.00	\$17.18	\$16.41	\$18.14	\$19.63
Machinery Maintenance/Repair	\$16.40	\$18.65	\$19.74	\$18.61	\$20.99	\$23.75	\$21.64
Mechanic - Automotive	\$17.42	\$16.44	\$16.90	\$17.99	\$18.40	\$18.92	\$17.91
Tool & Die Maker	\$21.21	\$20.49	\$21.61	\$20.83	\$21.28	\$25.46	\$22.92
Welders & Cutters	\$15.85	\$14.35	\$15.52	\$14.59	\$17.04	\$16.28	\$18.26
Warehouse Worker	\$11.92	\$10.90	\$10.80	\$10.67	\$10.57	\$10.29	\$13.69
Service		Service (Averages)					
Bank Teller	\$10.51	\$9.59	\$9.97	\$10.30	\$10.64	\$10.08	\$11.28
Cashier	\$10.35	\$8.05	\$8.32	\$8.18	\$8.52	\$8.11	\$8.94
Fast Food Worker**	\$6.10	\$7.34	\$7.45	\$6.87	\$7.66	\$7.54	\$8.52
Cook	\$10.50	\$8.70	\$9.88	\$9.55	\$10.38	\$10.08	\$12.86
Janitors & Cleaners	\$10.32	\$9.30	\$10.15	\$9.53	\$10.71	\$9.54	\$10.90
Security Guards	\$11.74	\$11.60	\$9.98	\$10.71	\$11.62	\$10.61	\$12.65
Nursing Aids	\$10.43	\$9.43	\$10.67	\$10.39	\$10.47	\$11.12	\$12.88
Waiters/Waitresses**	\$7.62	\$7.21	\$7.84	\$6.72	\$8.31	\$7.00	\$8.47
Sales		Sales (Averages)					
Sales Representative - Corporate	\$27.48	\$25.17	\$26.42	\$27.49	\$29.51	\$27.76	\$30.85
Customer Service Rep	\$15.90	\$13.79	\$14.17	\$14.72	\$15.89	\$14.88	\$16.40
Sales Person - Retail**	\$12.58	\$10.94	\$11.14	\$11.03	\$11.24	\$12.13	\$11.92
Overall Average	\$14.95	\$16.66	\$18.21	\$19.34	\$19.74	\$17.78	\$21.07

Source: Franklin County Area Labor Market Survey - October 2006 (Left column)
 Bureau of Labor Statistics 5/2005 Data Researched on 11/2006 (Right 6 columns)

DESIRED WAGES VS. ACTUAL WAGES

An important consideration in evaluating sites for expansion and new locations is the wage rates necessary for attracting workers with the necessary skills. While the quality and availability of workers with skills are critical factors for business, cost and compensation weigh on the national and global competitiveness factors.

Since the Franklin County Area Labor Market (ALM) is a highly diverse area with commuting distances reaching to rural areas to the west and south and highly populated urban areas to the east and north, the ALM has been segmented to reflect the differences in the industry demand for labor and workforce supply from the various areas. This means that employer demand and workforce expectations and willingness to commute vary widely within the ALM. To reflect this reality, Growth Services has further segmented the Area Labor Market into four (4) areas:

Franklin County (FC) Overall Area Labor Market: This includes all or parts of nine counties as defined.

Franklin County (FC) Metro Area Labor Market: This includes all of Franklin and Warren Counties and parts of Jefferson, St. Charles and St. Louis Counties.

Franklin County (FC) Rural Area Labor Market: This includes Crawford, Gasconade, Montgomery and part of Washington Counties.

Franklin County (FC) Alone Area Labor Market: This includes all of Franklin County as defined by its political boundaries.



The Four Tables and Charts

Utilizing the desired wage information in the following four charts provides the following conclusions concerning people actively seeking or changing jobs and people available or considering a change for the right opportunity in the Franklin County area:

10th Percentile in each of the charts shows a comparison of the actual wage, the desired wage of those actively looking and the desired wage of those available for the right opportunity. The low is \$6.50 per hour or less for those actively looking in the FC Rural ALM and the high is \$10.00 for the opportunity wage for the FC Alone ALM and the FC Metro ALM.

25th Percentile in each of the charts shows a comparison of the actual wage, the desired wage of those actively looking and the desired wage of those available for the right opportunity. The low is \$7.50 per hour for those actively looking in the FC Rural ALM and the high is \$12.50 for the opportunity wage for the FC Alone ALM and the FC Metro ALM.

50th Percentile in each of the charts shows a comparison of the actual wage, the desired wage of those actively looking and the desired wage of those available for the right opportunity. The low is \$10.50 per hour for those actively looking in the FC Rural ALM and the high is \$18.00 for the opportunity wage for the FC Metro ALM.

75th Percentile in each of the charts shows a comparison of the actual wage, the desired wage of those actively looking and the desired wage of those available for the right opportunity. The low is \$14.00 per hour for those actively looking in the FC Rural ALM and the high is \$25.00 for the opportunity wage for the FC Metro ALM.

The upper 25% Percentile in each of the charts shows a comparison of the actual wage, the desired wage of those actively looking and the desired wage of those available for the right opportunity. The low is \$14.01 per hour for those actively looking in the FC Rural ALM and the high is \$25.01 for the opportunity wage for the FC Metro ALM.

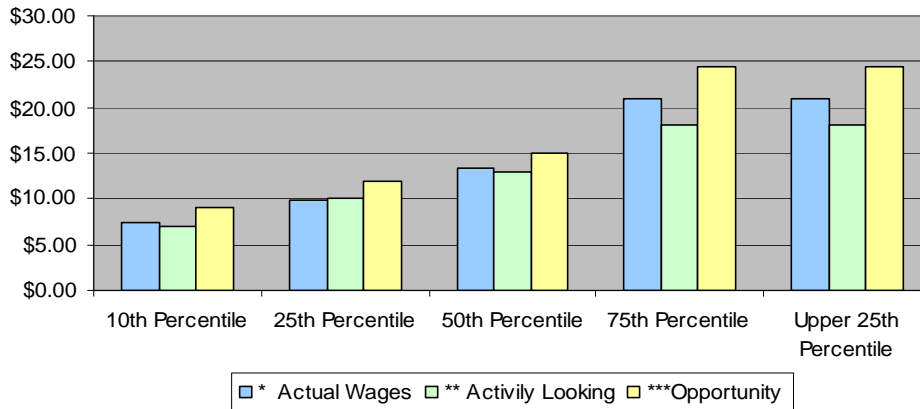
One conclusion is that generally applicants, whether unemployed or employed, have a lower wage expectation when actively seeking jobs than those working/not actively seeking work/but watching for the right opportunity.

The second conclusion is that generally based on current labor market conditions and the average actual wage and average opportunity wage a 10 to 15% premium above the average current occupational wage should provide an ample supply of qualified applicants. There still may be pockets of shortages for certain skill sets. However, in a larger labor market with reasonable commutes this should be less likely. A higher unemployment rate could drop the market rate below the average current occupational wage. So market demand and workforce supply can impact labor costs and differ for various available skills.

Franklin County ALM Nine Counties

	10th Percentile	25th Percentile	50th Percentile	75th Percentile	Upper 25th Percentile	Average Wage
* Actual Wages	\$7.50	\$9.96	\$13.40	\$21.00	\$21.01	\$15.85
** Actively Looking	\$7.00	\$10.00	\$13.00	\$18.00	\$18.01	\$14.19
***Opportunity	\$9.00	\$12.00	\$15.00	\$24.50	\$24.51	\$18.57
Enticement Opportunity/Actual	20.0%	20.5%	4.9%	16.7%	16.7%	17.2%

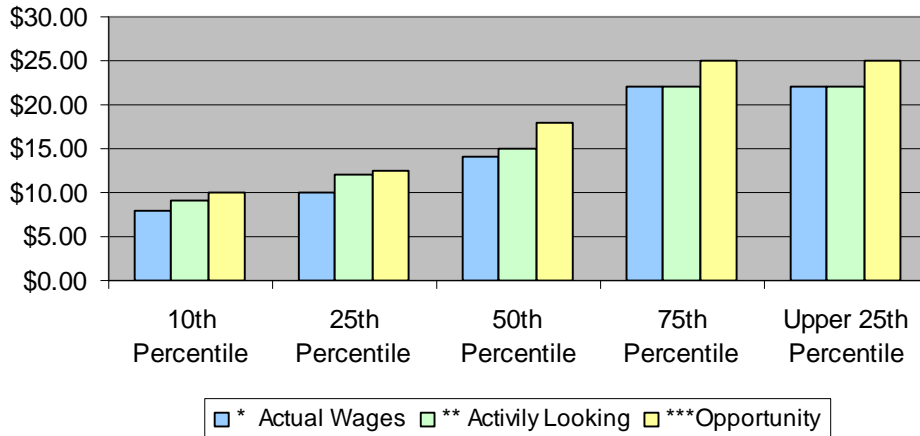
Desired v. Actual Wages Franklin County ALM Nine Counties



Franklin County Metro ALM Five Counties

	10th Percentile	25th Percentile	50th Percentile	75th Percentile	Upper 25th Percentile	Average Wage
* Actual Wages	\$8.00 or Less	\$10.00	\$14.00	\$22.00	\$22.01 or More	\$16.95
** Actively Looking	\$9.00 or Less	\$12.00	\$15.00	\$22.00	\$22.01 or More	\$16.91
***Opportunity	\$10.00 or Less	\$12.50	\$18.00	\$25.00	\$25.01 or More	\$19.89
Enticement Opportunity/Actual	25.0%	25.0%	28.6%	13.6%	13.6%	17.7%

Desired v. Actual Wages Franklin County Metro ALM Five Counties

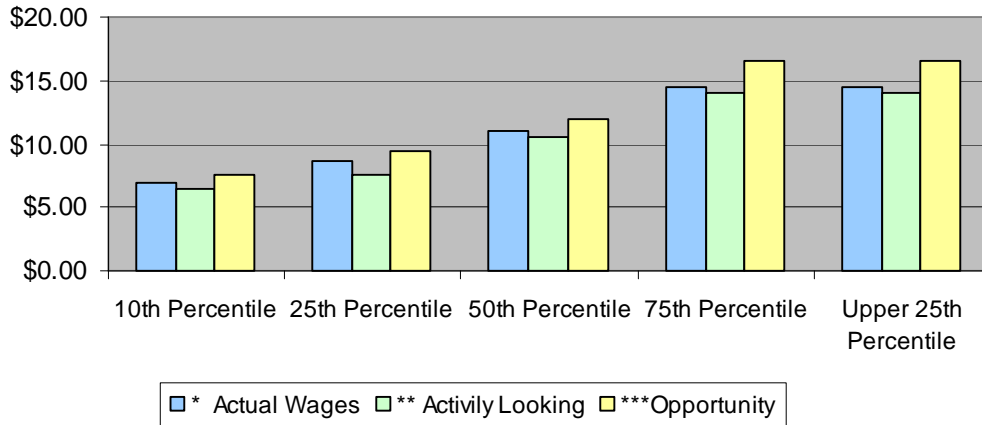


* Actual Wage Rates by Household Survey October 2006
 ** Desired Wage Rates for those Actively Looking or Seeking New Employment
 *** Desired Wage Rates for those Not Looking but Watching for Opportunity

Franklin County Rural ALM Four Counties

	10th Percentile	25th Percentile	50th Percentile	75th Percentile	Upper 25th Percentile	Average Wage
* Actual Wages	\$7.00 or Less	\$8.65	\$11.00	\$14.50	\$14.51 or More	\$11.23
** Actively Looking	\$6.50 or Less	\$7.50	\$10.50	\$14.00	\$14.01 or More	\$10.98
*** Opportunity	\$7.50 or Less	\$9.50	\$12.00	\$16.50	\$16.51 or More	\$14.54
Enticement Opportunity/Actual	8.6%	9.8%	9.6%	13.8%	13.8%	29.5%

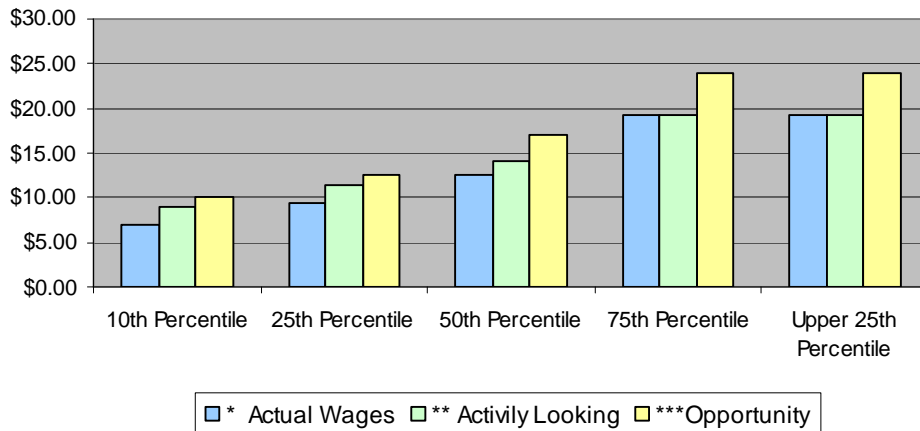
Desired v. Actual Wages Franklin County Rural ALM Four Counties



Franklin County Alone ALM

	10th Percentile	25th Percentile	50th Percentile	75th Percentile	Upper 25th Percentile	Average Wage
* Actual Wages	\$7.00 or Less	\$9.50	\$12.54	\$19.23	\$19.24 or More	\$14.45
** Actively Looking	\$9.00 or Less	\$11.50	\$14.00	\$19.20	\$19.21 or More	\$15.20
*** Opportunity	\$10.00 or Less	\$12.50	\$17.00	\$24.00	\$24.01 or More	\$17.10
Enticement Opportunity/Actual	42.8%	31.6%	35.6%	24.8%	24.8%	18.3%

Desired v. Actual Wages Franklin County Alone ALM



* Actual Wage Rates by Household Survey October 2006
 ** Desired Wage Rates for those Actively Looking or Seeking New Employment
 *** Desired Wage Rates for those Not Looking but Watching for Opportunity

V. WORKFORCE AVAILABILITY

A. OVERVIEW

INTRODUCTION

The primary purpose of the Franklin County ALM Workforce Availability Survey is to determine the total number of workers available for employers. The “available workforce” represents respondents who indicate they are either looking for employment or would consider changing their jobs for the right employment options. This information, along with labor quality and cost, is important to companies considering expansions or selecting new sites.

Workforce Availability is one of five components of this Workforce Study. The four other components are:

- Executive Summary
- Workforce Profile
- Workforce Quality
- Workforce Cost

The findings from this survey are based on a random telephone sample of 851 adults living in nine counties which are part of or adjacent to the St. Louis Metropolitan Statistical Area (MSA). The survey was conducted by Answernet, Columbus, OH, in October 2006 using a Computer Assisted Telephone Interviewing (CATI) System. The Franklin County Economic Development Group (FCEDG) contracted with Growth Services to conduct the workforce study. A total of 1952 households in the Franklin County Area Labor Market were contacted. In 851 of these households an adult who is working, unemployed, retired, a homemaker or student agreed to do the interview. When all 851 respondents are included in the analysis, the survey findings have a margin of error of 5%±. The margin of error for subgroups is larger.

Growth Services, in cooperation with the FCEDG developed the survey instrument to secure information normally not available through traditional methods. This methodology provides a means to ask questions of respondents from the Civilian Labor Force (CLF) and other potential members of the labor force (retired, homemakers, etc.) concerning their availability for new employment. It measures the extent to which currently employed individuals possess skills, education, and experience which would qualify them for better jobs; determine interest in a new job; and quantifies the wage rates at which they would accept a new job.

This report presents data different from published government statistics which show wages and employment for the entire workforce, most of whom have no interest in changing jobs. This report includes data on people who might change jobs and would be potential candidates for a new employer. The wages are quantified by number of workers available for an employer in various wage ranges.

The presentation of this report will begin with a few statements about the general workforce and then the available workforce who are open to new and existing employers with the right employment options or opportunities. The information and results are based on how the respondents answered the various questions and then were projected to the total workforce.

The section on “Increasing Workforce Availability” will include information about the population age 18 thru 64 and how the non-working population is represented in the age group. It also addresses students, spousal or gender employment differences and those residing in but working outside the Area Labor Market.

Further, the Workforce Availability has a category on “Working Students” to define the group that was segmented and identified in the “Available Workforce”. This group is represented by two different motivations: Those encouraged and normally paid for by their employers to improve their skills on the job and those interested and mostly paid by themselves for career enhancement and better jobs.

The reader should be aware that while the number of underemployed workers identified in this report is accurate (as are education, costs, etc.), however, all of those individuals would not be acceptable candidates for an employer. Their previous work records, stability, integrity, intelligence, appearance, and other factors could not be considered in this report.

This report also identifies workers who are commuting out of the designated nine county ALM and would be willing to work closer to home with the right employment opportunities.

LOCAL LABOR FORCE

Traditional methods of analyzing the local labor force have focused on two primary areas on what the Bureau of Labor Statistics (BLS) calls the Civilian Labor Force (CLF) and the Census of Employment and Wages (ES 202). The CLF represents all civilians 16 years of age and over classified as employed or unemployed with unemployed civilians defined as civilians available for work and who had made specific efforts to find employment. The CLF for the designated nine county Franklin County ALM is 134,600 workers. (See Section II, Page 1 Estimated Population and Civilian Labor Force) Since most employers in the Goods Producing Industry (Manufacturing, etc.) have age requirements for employment due to safety and other legal reasons, the survey only identified potential workers from 18 to 65 years of age. The ALM contains both urban and rural counties and reflects a highly diverse workforce both by its available talent and wage rates. This component, along with the Missouri River and access bridges changes the dynamics of the Workforce somewhat and needs to be considered when comparing the Franklin County ALM with Area Labor Market's in other parts of the country.

The Census of Employment and Wages (ES 202) is another excellent tool for assessing the local workforce; however, the Census counts jobs rather than individuals and only workers on payrolls and not those self-employed.

A review of these statistics represents a good starting point for understanding the labor force in and around Franklin County, Missouri. Other limitations associated with these statistics include individuals interested in employment but who do not meet the specific efforts in actively seeking employment during the last four weeks. These individuals may include full-time students who do not work, homemakers, the unemployed who are no longer seeking employment, military personnel who may be leaving military employment in the near future, and retired individuals who may be willing to work but have not been looking for work recently.

Further, most new employers draw their employees from individuals who are presently employed, not those who are unemployed. Also Census-based and BLS data do not address the possibility of workers moving from one industry to another in search of other employment opportunities. For example, an ALM may be classified as primarily a goods producing sector and not be considered as a service providing area and therefore be stereotyped as providing only certain types of applicants to certain employers.

GENERAL COMMENTS:

The "Available Workforce" represents respondents who indicate they are either looking for a job or would consider changing jobs for the right employment options. The survey interview provides information on those working, unemployed, and potential members of the workforce (retirees, homemakers, etc.) who are outside the published government statistics.

This study combines the survey data with the U.S. Department of Labor, Bureau of Labor Statistics data, with interested homemakers, retirees, and long-term unemployed who are seeking or would consider coming into the labor force. This report presents data different from published government statistics, which shows employment for the entire workforce, many of whom have no interest in changing jobs. As opposed to average wages, this report quantifies the number of those workers available for an employer in various wage ranges.

B. AVAILABLE WORKFORCE

TOTAL AVAILABLE WORKERS:

The following table shows that there is an "Available Workforce" in the Franklin County ALM Overall of 76,867. This would be more than sufficient for any size employer considering expansion or location in Franklin County. It is estimated 8,722 non-employed and 7,902 employed workers are seeking new employment, while 60,243 workers would consider changing jobs for the right employment options.

* AVAILABLE WORKFORCE			
	Overall	Metro	Rural
Total Available	76,867	61,442	15,425
Seeking Employment (not employed)	8,722	7,018	1,704
Seeking Employment (employed)	7,902	5,712	2,190
Change With Right Employment Options	60,243	48,712	11,531

*Information and results based on how respondents answered Questions and projected to the total workforce.

SUMMARY WORKFORCE COMPARISONS			
	Overall	Metro	Rural
ALM Population	259,900	198,200	61,700
Civilian Labor Force	134,600	106,200	28,400
Available Workforce	76,867	61,442	15,425
Underemployment	24,057	18,437	5,630
% of Available Workforce Underemployed	31.3%	30.0%	36.5%
Average Age Underemployed	39	38	41
Average Age Available Workforce	43	43	44
Average Age ALM 18-64	44	44	45
% Change to Outside Occupation	79%	80%	72%
% Family Income \$30,000 and More	50%	54%	42%
% Family Income \$70,000 and More	6%	7%	4%
Average Actual Wage	\$15.85	\$16.95	\$11.23
Average Desired Wage	\$17.90	\$1,810	\$14.34
% Females	49%	46%	55%
Education Some College and Greater	42%	44%	38%
High School Degree	86%	87%	84%

OCCUPATION GROUPS

The nine county overall occupation category table shows the professional/technical category represents approximately 19%, the blue collar manufacturing/production category 45%, and the service sector category 25%. Based on the views of the respondents, the percentage of available workforce from the rural area is higher in the Professional/Technical and Services area than the Metro counties but lower in the Manufacturing/Production category.

FRANKLIN COUNTY ALM OCCUPATIONS

	Overall		Metro		Rural	
Professional/Technical	14,835	19.30%	11,411	18.60%	3424	22.20%
Doctors/Attorneys/Engineers/Business Professional, Education/Professor, Sales, Other White Collar						
Manufacturing/Production	34,206	44.50%	27,842	45.30%	6364	41.30%
Factory Worker, General Labor/Blue Collar, Mechanic						
Services	19,104	24.90%	15,171	24.70%	3933	25.50%
Hotel/Restaurant/Food Service, Government, Farmer/Agriculture, Arts/Crafts, Sales Clerk, Social Service/Health, Clerical						
Other	8,722	11.30%	7,018	11.40%	1704	11.00%
Homemaker/Retired/Unemployed						
Totals:	76,867	100%	61,442	100%	15425	100%

AVAILABILITY BY OCCUPATION AND CURRENT WAGE

	Available Workers	Percent	Average Wage
Professional/Technical	14835	19.3%	
Business/Other Professionals	10915	14.2%	\$18.87
Education/Professors	3920	5.1%	\$17.42
Manufacturing/Production	34206	44.5%	
Factory Worker	8609	11.2%	\$14.14
General Labor/Construction	15066	19.6%	\$22.39
Blue Collar	7456	9.7%	\$14.68
Mechanic/Welder	3075	4.0%	\$20.94
Services	19140	24.9%	
Clerical/Retail	4612	6.0%	\$12.57
Social Services	6687	8.7%	\$14.59
Hotel/Restaurant/Food Service	3843	5.0%	\$8.37
Government	3997	5.2%	\$13.65
Other	8686	11.3%	
Retiree/Homemaker/Student	1845	2.4%	N/A
Other Non-Employed	6841	8.9%	N/A
Total	76867	100.0%	\$14.49

UNDEREMPLOYED

The desired wage of the “Available Workforce” includes all three categories of the available workforce: those seeking employment (not employed), those seeking other employment (employed), and those who would change with the right employment options. The pay rates they expect to receive range from under \$7.00 to over \$30.00 per hour.

The primary source of good employees is the category of the Underemployed, those individuals who are now working but desire a better job and who possess the skills, education, and experience to qualify for better jobs. The Franklin County ALM has 24,057 or 31.3% of the available workforce underemployed. The Franklin County Rural ALM has 36.5% of its available workforce underemployed.

UNDEREMPLOYMENT						
	Overall		Metro		Rural	
Yes	24,057	31.3%	18,433	30.0%	5,630	36.5%
No	52,810	68.7%	63,009	70.0%	9,295	63.5%
Total	76,867	100.0%	61,442	100.0%	15,425	100.0%

EDUCATION ACHIEVEMENT OF AVAILABLE WORKFORCE				
	Less than High School	High School Graduate	Some College	College Graduate
Not Employed Seeking Employment	32.9%	67.1%	17.1%	6.6%
Employed Seeking Different Employment	6.3%	93.7%	83.7%	15.5%
Employed Change With Right Opportunity	2.8%	97.2%	56.0%	20.9%
Underemployed	3.0%	97.0%	66.2%	23.5%
All Employed	3.3%	96.7%	52.2%	18.8%

DESIRED WAGE:

Eighteen percent (18%) of the "Available Workforce" would be interested in employment with a wage of up to \$8.99. Fifty-nine percent (59%) would be interested in employment with a wage of up to \$12.99. This includes the Franklin County Rural ALM with 65% of its available workforce interested in wages of up to \$12.99.

AVERAGE DESIRED WAGE RATES			
	Overall	Metro	Rural
Professional/Technical	\$18.48	\$19.95	\$16.20
Manufacturing/Production	\$18.51	\$19.10	\$13.25
Services	\$12.66	\$12.91	\$11.98
(Working Students)*	\$15.20	\$15.80	\$14.10
Overall Average	\$17.90	\$18.10	\$14.34
Overall Median	\$15.25	\$16.20	\$13.80

*Working students included in above 3 categories

DESIRED WAGE RATE FRANKLIN COUNTY ALM AVAILABLE WORKFORCE			
\$6.99 or Less	\$7.00 - \$7.99	\$8.00 - \$8.99	\$9.00 - \$9.99
4,996	4,151	4,996	4,151
\$10.00 - \$10.99	\$11.00 - \$11.99	\$12.00 - \$12.99	\$13.00 - \$13.99
7,072	3,766	8,763	6,226
\$14.00 - \$15.99	\$16.00 - \$17.99	\$18.00 - \$19.99	\$20.00 - \$21.99
9,532	4,535	3,766	2,460
\$22.00 - \$24.99	\$25.00 - \$27.99	\$28.00 - \$30.99	\$31.00 or More
1,230	4,151	4,151	2,921

DESIRED WAGE RATE						
Wage Rate	OVERALL		METRO		RURAL	
	Available Workers	Percent	Available Workers	Percent	Available Workers	Percent
8.99 or Less	14,143	18.4%	2,581	4.3%	5,491	35.6%
\$9.00 - \$12.99	23,752	30.9%	18,186	29.6%	4,628	30.0%
\$13.00 - \$17.99	20,293	26.4%	19,969	32.4%	3,085	20.0%
Over \$18.00	18,679	24.3%	20,706	33.7%	2,221	14.4%
Total:	76,867	100.0%	61,442	100.0%	15,425	100.0%

EDUCATION LEVEL

The education level of the overall "Available Workforce" shows 41.5% having at least some college education. A total of 86.2% have at least a high school diploma. This compares to the Franklin County Rural ALM with 38.2% having at least some college education and 84.6% having a high school diploma..

EDUCATION LEVEL						
Education	OVERALL		METRO		RURAL	
	Available Workforce		Available Workforce		Available Workforce	
Post College / Professional	1.7%	1307	1.8%	1106	1.4%	216
College Graduate	11.4%	8763	13.3%	8172	7.6%	1172
Vo-Tech / Community College	7.9%	6072	5.1%	3134	13.7%	2113
Some College	20.5%	15,758	23.0%	14,132	15.5%	2392
High School Graduate	44.7%	34,359	43.8%	26,911	46.4%	7157
Less Than High School	13.8%	10,608	13.0%	7987	15.4%	2375
Totals:	100.00%	76,867	100.00%	61,442	100.00%	15,425

COMMUTING DISTANCES

The overall "Available Workforce" indicates it is open to commuting for the right employment option. The table shows 67,259 people or 87.5% of available workforce would commute more than 15 minutes/miles, one way, for work. It also shows that 24,015 people or 43% of the available workforce are willing to travel more than 30 minutes/miles and 6,519 people (12%) will commute for more than 60 minutes/miles.

AVAILABLE WORKFORCE		
Distance/Time TRAVEL ONE WAY		
61 Miles/Minutes or More	9608	12.5%
46-60 Miles/Minutes	17,526	22.8%
31-45 Miles/Minutes	13,144	17.1%
26-30 Miles/Minutes	15,912	20.7%
16-25 Miles/Minutes	11,069	14.4%
11-15 Miles/Minutes	7302	9.5%
10 or Less Miles/Minutes	2306	3.0%
TOTAL	76,867	100.0%

AVAILABLE WORKFORCE	
Distance/Time TRAVEL ONE WAY	
Professional/Technical	28
Manufacturing/Production	39
Services	24
*Overall Average	32
*Overall Median	29
Working Students	26

*includes all categories

AGE/JOB LONGEVITY/GENDER

The age, job longevity and gender statistics for the available workforce for each area market component for Franklin County is listed in the tables below. These workforce measures have become more important with the aging population and approaching retirements and the institutional memory of a mature and long time workforce. The age groupings reflect a slightly younger available workforce in the designated Metro Counties than the Rural Counties. The length of employment at the same job also shows the metro counties with more years on the job than the Rural Counties. Overall this tends to show a dedicated and stable workforce for employers. The gender data shows only the participation rates of the phone survey.

AGE GROUP						
Age Group	Overall		Metro		Rural	
	Percent	Numbers	Percent	Numbers	Percent	Numbers
18-29	18.1%	13,913	16.5%	10,138	21.1%	3,255
30-39	19.8%	15,220	21.4%	13,149	16.8%	2,591
40-49	30.0%	23,060	33.5%	20,583	23.2%	3,579
50+	32.1%	24,674	28.6%	17,572	38.9%	6,000
Total:	100.0%	76,867	100.0%	61,442	100.0%	15,425

AVERAGE AGE			
	Overall	Metro	Rural
Professional/Technical	41.6	40.4	43.9
Manufacturing/Production	42.2	41.8	43.4
Services	40.5	40.5	42.3
Working Students	29.4	29.1	31.2
Overall Average:	43.1	42.9	43.7
Overall Median:	44.0	44.0	45.0

YEARS ON THE JOB			
Job Length	Overall	Metro	Rural
Under 3 Years	17.8%	16.8%	19.9%
3 to 5	15.6%	13.9%	19.3%
6 to 10	17.4%	16.5%	19.3%
11 to 15	13.1%	14.7%	9.9%
16 to 20	15.1%	16.8%	11.6%
21 to 30	16.7%	17.8%	14.4%
Over 30	4.3%	3.7%	5.5%
Average Years	12.8	13.1	12.1

GENDER			
	Overall	Metro	Rural
Male	50.7%	53.3%	45.4%
Female	49.3%	46.7%	54.6%
Total:	100.0%	100.0%	100.0%

JOB CHANGE INDUCEMENT

Salary appears to be the top motivator for changing jobs with retirement benefits, flexible hours, and health benefits following. The one category with a significant change from other studies in the past is the "Job Closer to Home" category. This may well reflect the higher transportation costs.

JOB CHANGE INDUCEMENT			
Salary/Benefits	Overall % Yes	Metro % Yes	Rural % Yes
Salary/Benefits	84.10%	86.90%	79.20%
Retirement	73.50%	76.80%	67.70%
Flexible Hours	68.40%	71.80%	62.60%
Health Benefits	62.20%	61.50%	63.40%
On the Job Training	60.20%	65.00%	51.10%
Better Work Environment	58.20%	61.30%	52.90%
Job Closer to Home	57.20%	59.80%	52.90%
Education Opportunities	54.70%	53.60%	56.60%
Different Community	35.80%	35.10%	37.00%
On-site Childcare	31.10%	32.70%	28.20%

CHANGING PRIMARY EMPLOYMENT FIELD:

Changing jobs from one field to a different type of position may not be something many individuals are willing to do. If there are a large percentage of those unwilling to change their job positions, it could limit the type of employer who can enter the area labor market. In the Franklin County ALM, 59.2% of the workers indicated a willingness to accept a position outside their primary field of employment (i.e., manufacturing to the service sector).

CHANGING FIELD OF EMPLOYMENT						
	Overall		Metro		Rural	
	Number	Percent	Number	Percent	Number	Percent
Yes	45,505	59.2%	35,821	58.3%	9,147	59.3%
No	31,362	40.8%	25,621	41.7%	6,278	40.7%
Total	76,867	100.0%	61,442	100.0%	15,425	100.0%

C. INCREASING WORKFORCE AVAILABILITY

WORKING STUDENTS

The Franklin County available workforce has 3,840 adult student ages 18-65 enrolled in various courses (outside the work environment) for skill enhancement or career development. Along with their education requirements, they are working full or part-time jobs represented in almost all of the various occupations. This group may be participating as adult students in various ways: Academic Course Work, Skill Enhancement, or Career Development. Working students also have the higher expectations in wage rates (\$15.20 per hour or average) when making a job change. This compares with the professional/technical at \$18.48, manufacturing/production at \$18.51, and the service sector at \$12.66. The information and results are based on how the respondents answered the various questions and then were projected to the total available workforce.

SPOUSAL EMPLOYMENT

Much is said about opportunities for spousal employment in smaller labor markets. Spousal employment can be a concern for either gender depending on the career choices of the primary wage earner. In Franklin County these concerns are not as great and presents an opportunity compared to other locations with the county as part of the St. Louis MSA.

A review of the gender data is evaluated to determine if significant differences present themselves in areas such as Employment, Underemployment, Seeking New Opportunities, Type of Occupations, Wages and Length of Employment.

In the employment area, women present no significant differences, with only a slightly larger percentage of employment participation than men. In the Homemaker area, there are more than twice as many women as men. Women consider themselves slightly more underutilized than men and thus Underemployed.

The occupations tend also to differ significantly for the genders. Women are represented in the clerical, office, retail, hotel, restaurant, social services and health care at two times the rate of men. The reverse is true for general labor, construction, Plumber, and Mechanic with men represented about three times the rate of women. The rest of the occupations do not present any significant difference.

In the wage levels, there appear to be only minor differences with the entry level relatively the same and the mid and higher ranges more represented by men. The length of time on the job appears to be slightly greater for men than women.

Overall, women appear to be represented on the job in equal or greater percentages than men. They do, however, tend to have shorter tenure, lower wages and a greater feeling of underutilization

WORKING OUTSIDE THE LABOR MARKET

With commuting distance, cost and time becoming more of a factor, job opportunities closer to home can be important. Of those responding to the phone survey, 85.6% live and work within the Franklin County ALM. A little over 12% who live within the designated nine county ALM work outside the area. At the county level 76% of the respondents live and work in Franklin County.

SOURCES FOR AVAILABLE WORKERS

EMPLOYMENT STATUS AND SOURCES				
Age 18 to 65, FRANKLIN COUNTY ALM				
	Overall	Metro	Rural	Franklin County
EMPLOYED	61.4%	62.8%	58.4%	63.5%
Retired	3.9%	3.3%	4.6%	4.2%
Homemaker	5.2%	4.7%	5.7%	5.5%
Disabled	9.2%	8.6%	9.5%	8.5%
Lacking Skills	2.5%	1.8%	3.4%	1.1%
Non-Working Student	1.5%	2.0%	.5%	1.8%
Job Availability	5.9%	6.3%	5.4%	5.1%
Child Care	2.9%	3.7%	.4%	3.8%
Transportation	0.7%	0.2%	1.8%	0
Wish to Stay Home	6.8%	6.6%	10.3%	6.5%
Total	100.0%	100.0%	100.0%	100.0%

The sources for increasing the “Available Workforce” come from both those employed and not working. Those employed represents approximately 61.4% of the “Overall” available population between the age of 18 and 65 in the Area Labor Market and includes “Working Students” and “Military.”

The 7,305 individuals in the Franklin County ALM “Seeking Employment-Not Employed” are from the “not working group.” Those not working are represented by respondents from ages 18 to 65 in the FCALM and Franklin County and provides another means for assessing the available Labor Market and increasing the Labor Pool. The range for those seeking or not seeking employment include; Retired 3.9%, Homemakers 5.2%, Disabled 9.2%, Lacking Skills 2.5%, Non-Working Students 1.5%, Job Availability 5.9%, Child Care 2.9%, Transportation .7% and Wish to Stay Home 6.8%. Those not represented in this sample study are those residing in local, state or federal correction or other types of institutions.

The goal is to increase the available labor market so employers can hire the most skilled and the best qualified applicants at the most competitive costs. The goal of many communities and regions from a public policy perspective is to provide an expanded and qualified labor pool with the skills and work values for a competitive workforce. Several areas present opportunities for the FCALM in increasing the available labor force: The “Retired” at 3.9% of the 18 to 65 age group, the “Homemaker” at 5.2%, and those proclaiming themselves as “Lacking Skills” at 2.5%. The degree of withdrawal of this potential workforce group in actively seeking work is dependent on the right opportunity and the need for engagement and financial support. While the availability and motivation to work is important, the degree of accommodation for the Disabled -- one of the larger groups -- and Child Care and Transportation (not significant for the FCALM) may be important considerations at both the employer and community level. Another element that ranked high among the factors for evaluating new employment opportunities was “work schedule flexibility.” This ranked number three behind increase in salary and improved retirement and above improved Health Care benefits. Work Schedule Flexibility, while difficult for many jobs and industries, can be a way of increasing the Available Workforce.

Another area not measured here is the large number of applicants rejected due to behavior problems in the past such as criminal activity, etc. State statutes for safety reasons or otherwise prohibit many occupations and industries from hiring this growing segment of the population (otherwise available and sometimes qualified skill-wise) from employment. With increasing workforce shortages for the future from the demographic changes and an aging population, the question of a more proactive approach in increasing the labor pool with productive workers is critical. Weighing the costs for education and other programs with the social and economic benefits will be key in remaining competitive in a global economy.