

LABOR MARKET ASSESSMENT

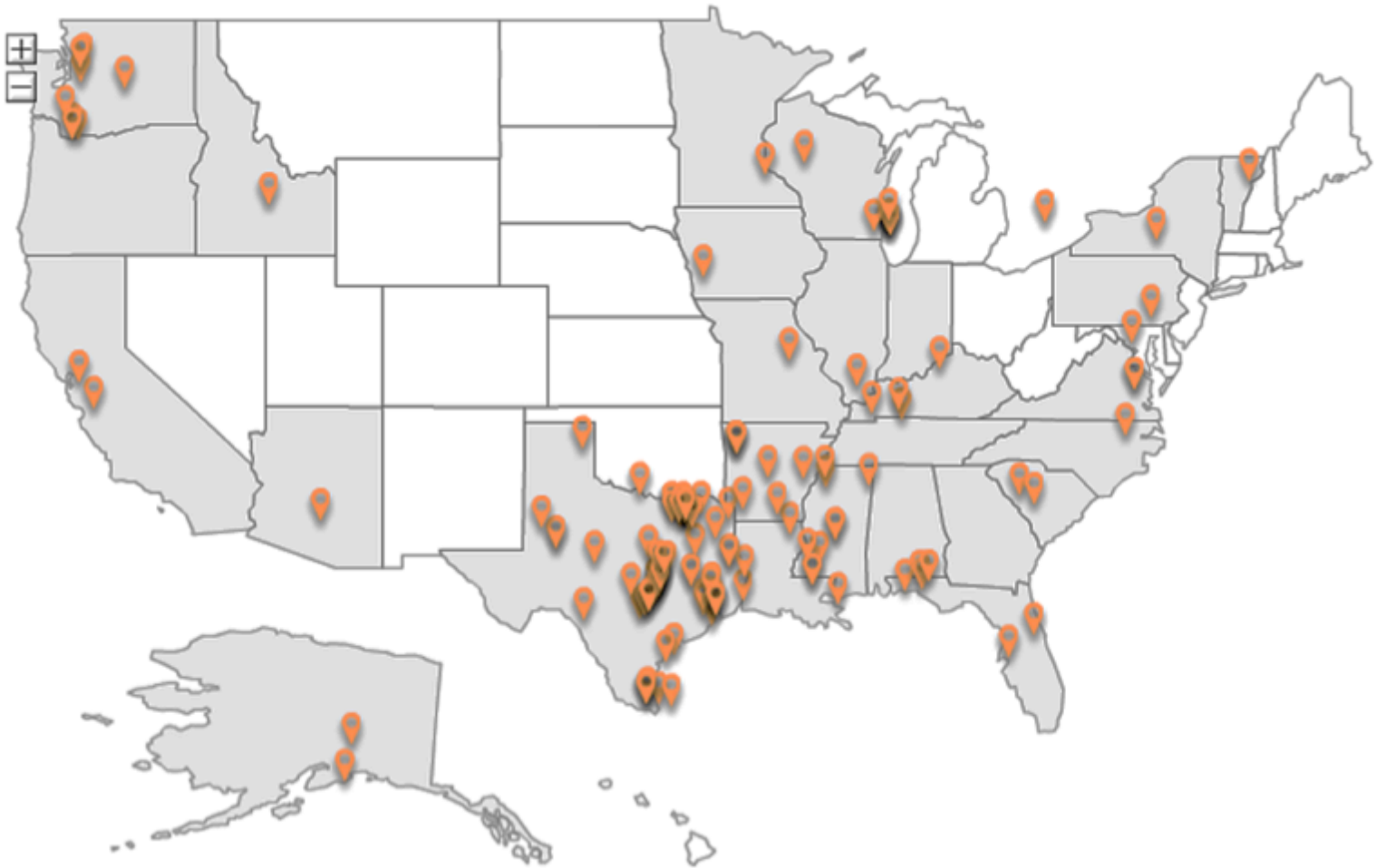
About us



- Founded in 1995
- Based in Austin, TX
- Expertise: economic & workforce development strategic planning

Our Work

We have 17 years of experience in over 100 communities.



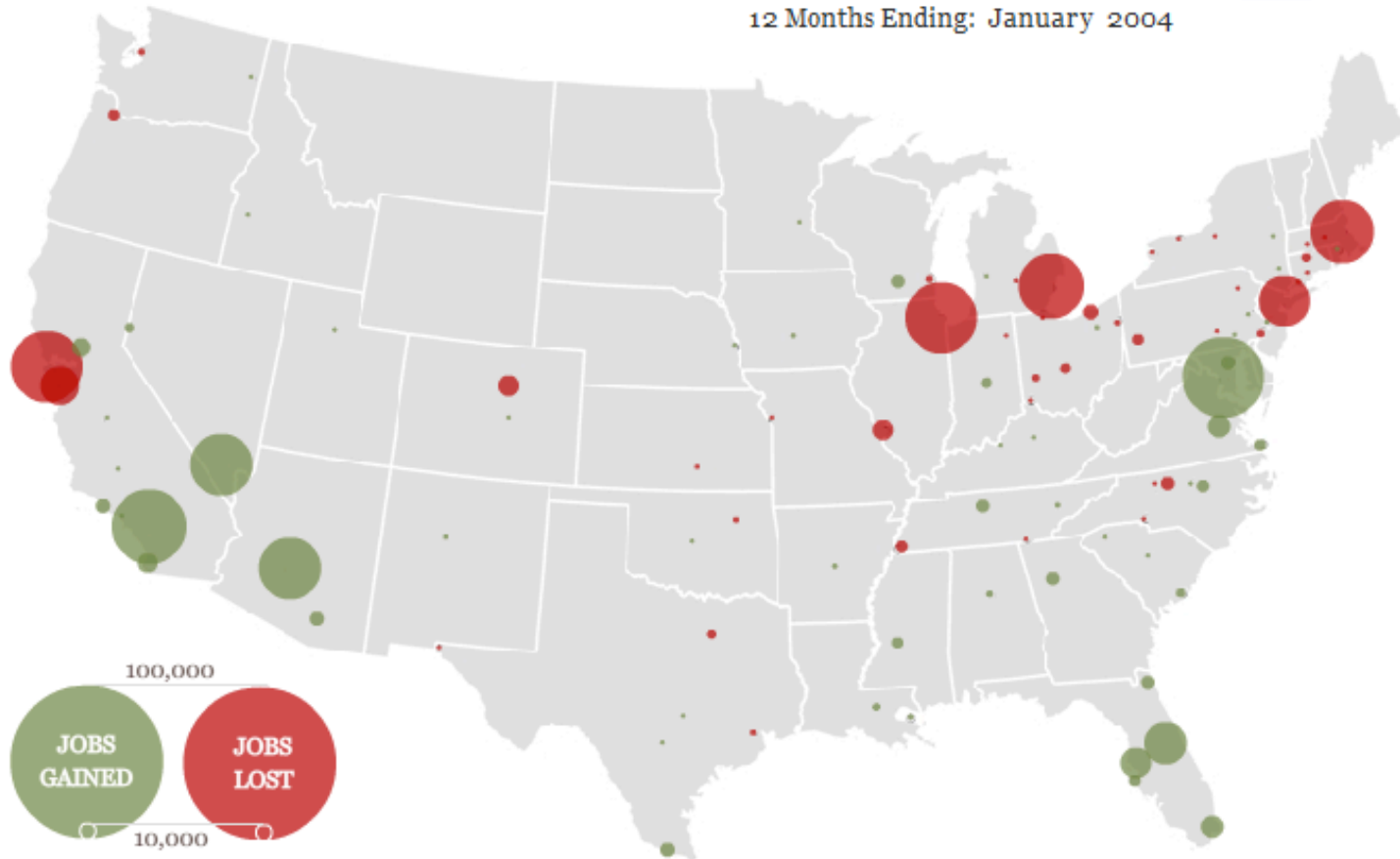
CURRENT PROJECTS

- ❑ **Puget Sound Regional Commission** – CEDS (Seattle, WA region)
- ❑ **Association of Central Oklahoma Governments** - CEDS (Oklahoma City, OK region)
- ❑ **Clarksville – Montgomery County EDC** – Labor Force Analysis (Clarksville, TN – Hopkinsville, KY area)
- ❑ **East Alabama Regional Planning and Development Commission** -Workforce/Economic Diversification Strategy (Anniston, AL)
- ❑ **Fort Collins, CO** – Economic Health Strategy
- ❑ **Green River Area Development District** – Regional Workforce and Economic Development Strategy (Owensboro, KY region)
- ❑ **Hispanic Scholarship Fund** – Market and Impact Analysis (National and State of Georgia)
- ❑ **Redmond, WA** – Economic Development Plan

The Geography of Jobs



Net Job Gains / Losses by Metropolitan Statistical Area,
12 Months Ending: January 2004

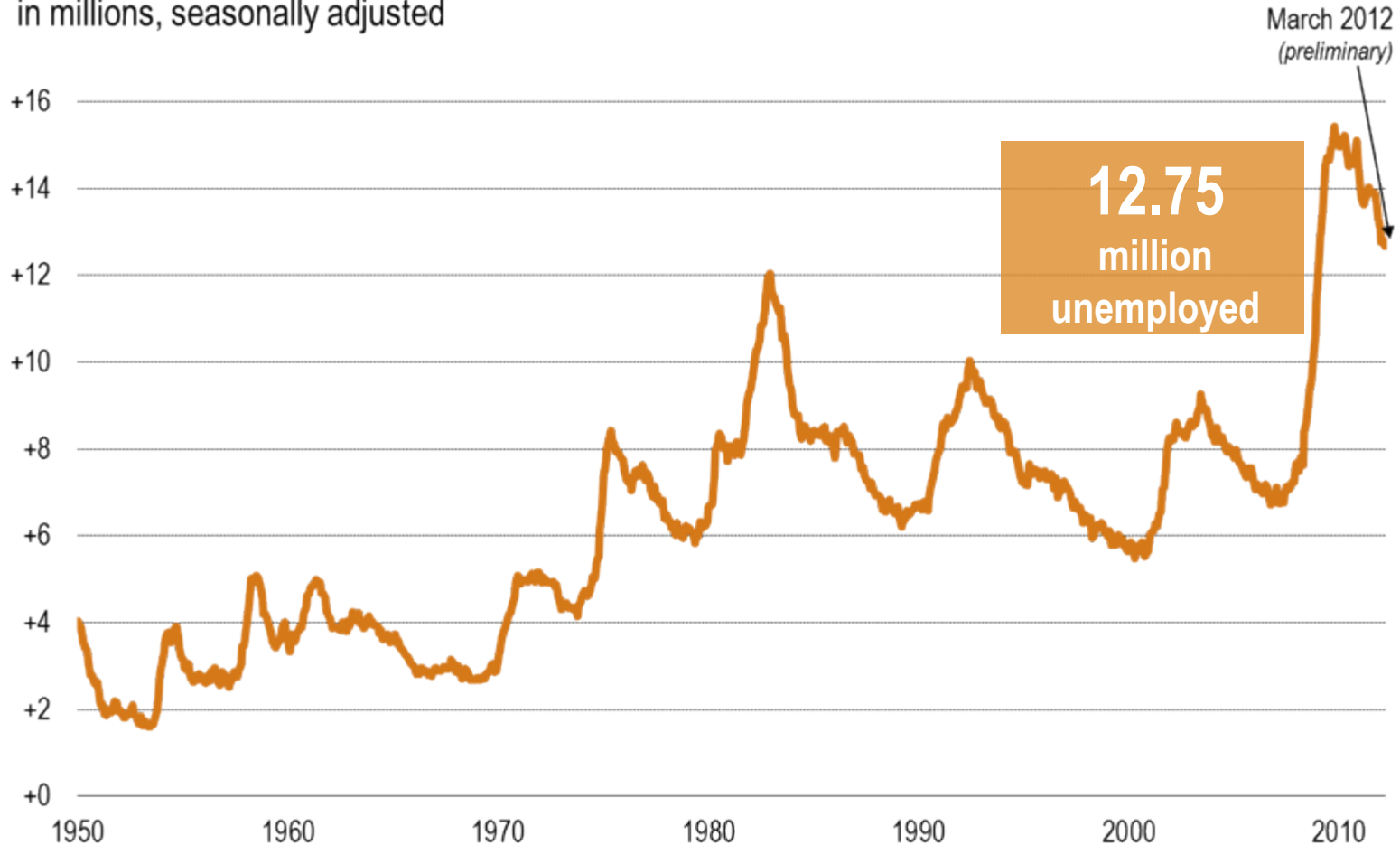


Note: Top 100 Metropolitan Statistical Areas in the contiguous United States based on number of jobs as of December 2008

Source: BLS and state labor agencies (via Moody's Analytics), TIP Strategies

Total unemployed in the US

TOTAL UNEMPLOYED, 16 YEARS AND OVER
in millions, seasonally adjusted

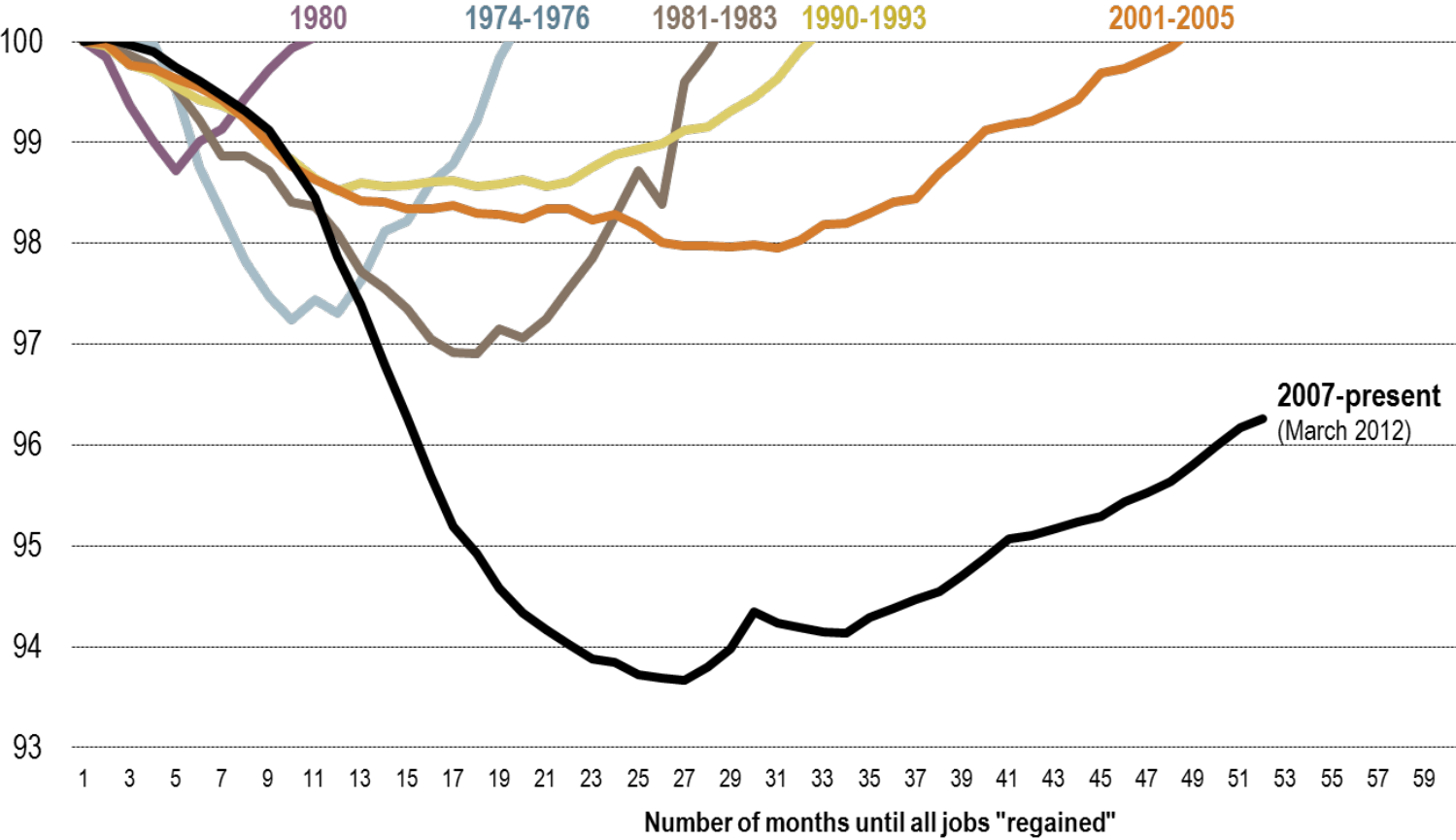


Source: U.S. Bureau of Labor Statistics (Current Population Survey)

Recessions compared

RECESSIONARY EMPLOYMENT TRENDS

Peak employment = 100



Sources: U.S. Bureau of Labor Statistics, Current Employment Statistics (total nonfarm employment, seasonally adjusted); NBER (recession dates); New York Times (format)

“As many as 600,000 jobs are going unfilled ... at the same time the national education curriculum is not producing workers with the basic skills manufacturers need.”

--Boiling point? The skills gap in U.S. manufacturing, a survey of 1,123 manufacturing executives conducted by Deloitte and The Manufacturing Institute, October 2011.



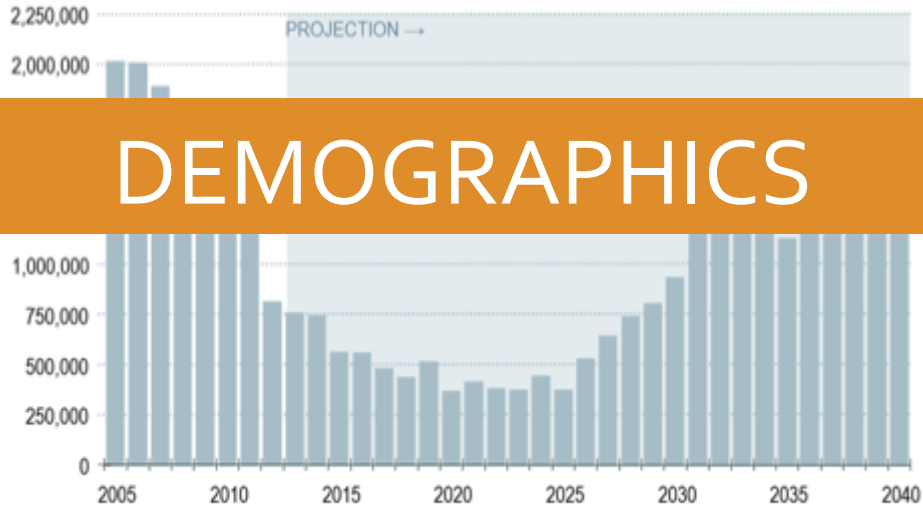
Skills gap?

52 percent
*of U.S. companies
are struggling to
fill key jobs*

According to
ManpowerGroup's
*2011 Talent Shortage
Survey*, the highest
percentage in the six-year
history of the survey



GROWTH OF THE WORKING AGE POPULATION
Projected net annual change for the US population age 18-64



DEMOGRAPHICS

Sources: TIP Strategies; U.S. Census Bureau



AUTOMATION



POLICIES



March 2011

Students Opting Out of Manufacturing, Trades

by Alan S. Brown

mechanical engineering

Mechanical Engineering Magazine, February 2010



[View larger](#)

America has always been a nation of hands-on tinkerers, but many American teenagers and adults are turned off by working with their

CULTURE

A survey found that 52% of teenagers 13 to 17 years old had little or no interest in a manufacturing career and another 21% were

**“In 2011, the
jobless rate among
post-2001 veterans
averaged 12.1 %...**

With more soldiers coming home this year, and the Pentagon preparing to thin out the ranks by 2017, the problem threatens to get even worse.”

-Forbes, June 12, 2012



Veteran's resources

2012 | TIP Strategies, Inc.

EMPLOYMENT RESOURCES FOR TRANSITIONING SERVICE MEMBERS

Two hundred thousand service members transition to the civilian workforce each year. Communities and employers have a vested interest in attracting or retaining this unique talent pool by facilitating the transition from military to civilian employment. With this in mind, TIP Strategies has created a database of approximately 100 Federal, non-profit, and private programs intended to connect transitioning service members with employment opportunities, transition support, and education and training assistance. An excellent version of this database is also available for download from our website at: <http://tipstrategies.com/?p=8458>

ABOUT

TIP STRATEGIES, INC. (TIP) is a privately held Austin-based economic development consulting firm committed to providing quality solutions for public and private-sector clients. Established in 1995, the firm's primary focus is economic development and strategic planning. We have experience in over 100 countries, including a number of defense

SERVICES

- Economic Diversification Strategy
- Transferable Skills Analysis
- Strategic Planning
- Workforce Analysis
- Occupational Demand Analysis
- Industrial Cluster Analysis
- Education and Training Inventory

CONTACT

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EMPLOYMENT RESOURCES FOR TRANSITIONING SERVICE MEMBERS | FEDERAL

Army COOL (Credentialing Opportunities Online)

Army personnel can use the COOL website to find civilian credentials related to their military occupational specialty (MOS), and gain understanding of what it takes to obtain the credentials. The site also provides information on available programs that may help pay credentialing fees. At this time, Army COOL information currently includes enlisted MOSs only, but there are plans to add Warrant Officer MOSs.

<https://www.cool.army.mil/index.htm>

CareerOneStop Veterans ReEmployment

CareerOneStop is a website sponsored by the US Department of Labor Employment and Training Administration. The site includes a military-to-civilian job search and links to additional benefits and assistance.

<http://www.careeronestop.org/reemployment/veterans/default.aspx>

Defense Finance and Accounting Service (DFAS)

The DFAS provides payment services for the US DOD. The site includes information on pay and allowances, wounded warrior claims, and tax payments for military personnel. Military employment verification is also available through this site.

www.dfas.mil

Employer Support for the Guard and Reserve (ESGR)

ESGR is a program within the Office of the Assistant Secretary of Defense for Military Personnel Affairs that promotes cooperation and understanding between component members and their civilian employers and works to resolve the conflicts arising from an employee's military service.

www.esgr.mil

Employment Locator for VA services

The Employment Locator for VA services is a database of facility and key staff information within 1731 VA facilities maintained on a regular basis by editors and administrators throughout the VA network. The site categorizes information by state and administration, as well as by viewing through an interactive map of the US.

www.va.gov/directory/guide/home.asp

The Federal Job Bank is a website of the US Government, operated by the Office of Management and Enterprise Services, to help Veterans find jobs in the Federal Government. An individual can search for jobs as a Veteran, transitioning member, or family member. Features a page called "Vet to Vet" where Veterans can share their stories and a Facebook Page. Includes a listing of VA Program Offices, which provides contact names, addresses, and phone numbers.

GI Bill Website

This site, now operated by the Department of Veterans Affairs, centralizes information related to GI Bill benefits, including application instructions and where to find counseling/support.

www.gibill.va.gov

Hero 2 Hired (H2H)

A comprehensive employment program offering resources to help Reserve Component job seekers find their next opportunity, including: job listings; career exploration tools; education and training resources; virtual career fairs; a mobile app for iOS, Android and Windows Phones; an innovative Facebook application; and a variety of networking opportunities. Also provides opportunities for military-friendly employers to locate potential Veteran candidates.

www.h2h.jobs

Hiring Our Heroes

A sustained grassroots campaign to help Veterans and military spouses find meaningful employment in hundreds of communities across the country. Hiring Our Heroes hosts hiring fairs through partnerships with 1,600 local chambers and 3 million businesses. There is also a similar stand-alone program for military spouses sponsored by the same organization.

www.uschamber.com/hiringourheroes

Joining Forces Campaign

A national initiative that mobilizes all sectors of society to give service members and their families the opportunities and support they have earned. A challenge to the private sector to hire or train 100,000 unemployed Veterans and their spouses.

www.whitehouse.gov/joiningforces

Military OneSource

A 24/7, toll-free information and referral telephone service available worldwide to active duty, Reserve, and National Guard military members and their families. It is operated for the purpose of "providing help with parenting and child care, education, relocation, financial and legal concerns, everyday issues (finding services in a local community, consumer issues), emotional well-being, health and fitness, addiction and recovery, adult or child special needs, military life (pre/post deployment, reunion, etc.), work concerns, crisis support, elder care, TRICARE, and much more." Services are available online or by phone.

www.militaryonesource.mil

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Project Overview

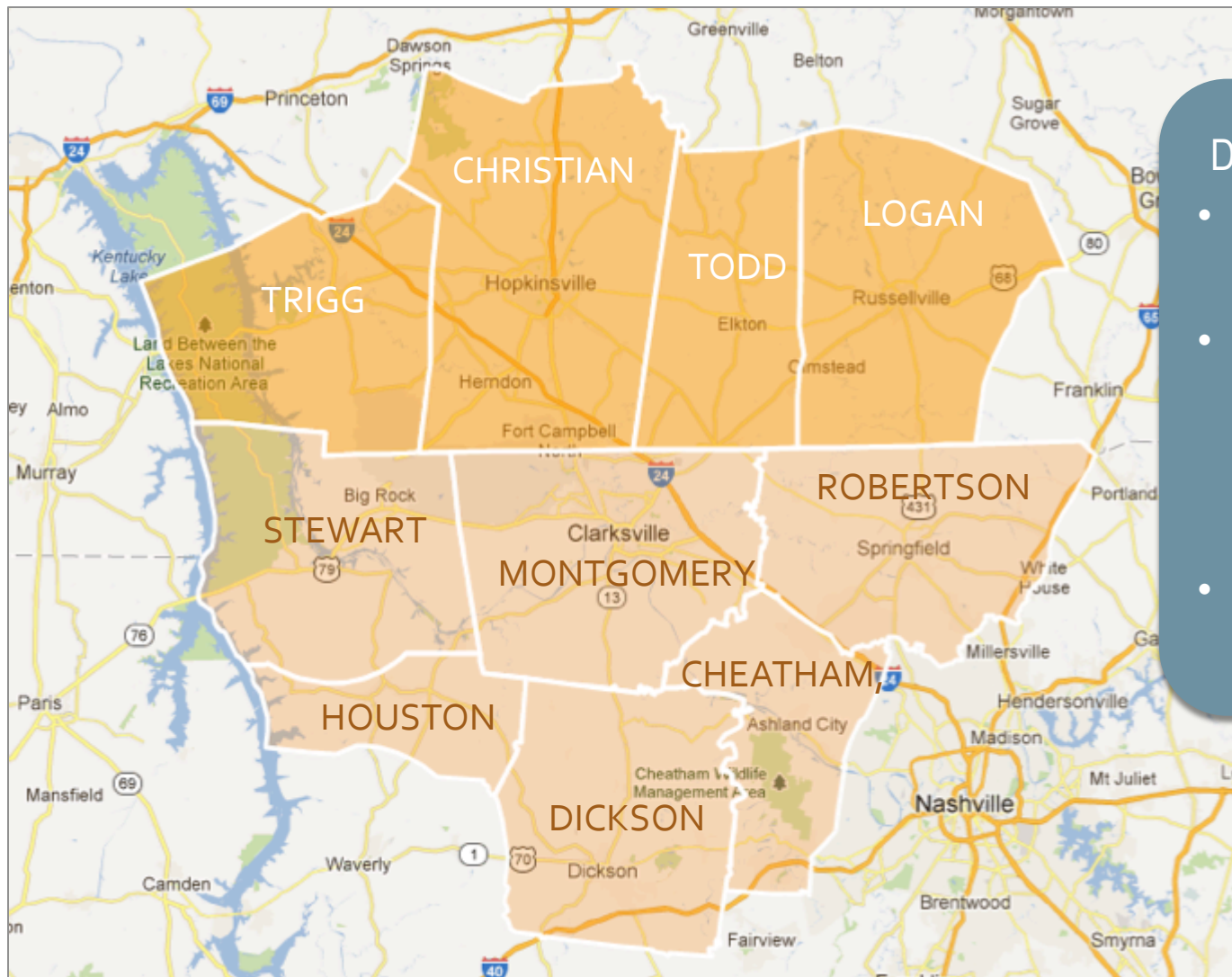
Major elements

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- Labor market
 - ▣ Labor shed definition
 - ▣ Quantitative analysis
 - ▣ Employer input
- Military workforce
 - ▣ Veterans' Inventory update
 - ▣ MOS analysis
- Target industry requirements
 - ▣ Automotive
 - ▣ Distribution & logistics
 - ▣ Alternative energy technologies
 - ▣ Business process outsourcing
- Recommendations

Region of analysis

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Data presented for:

- Montgomery County
- 10-county labor shed (including Montgomery County)
- Davidson County (Nashville)

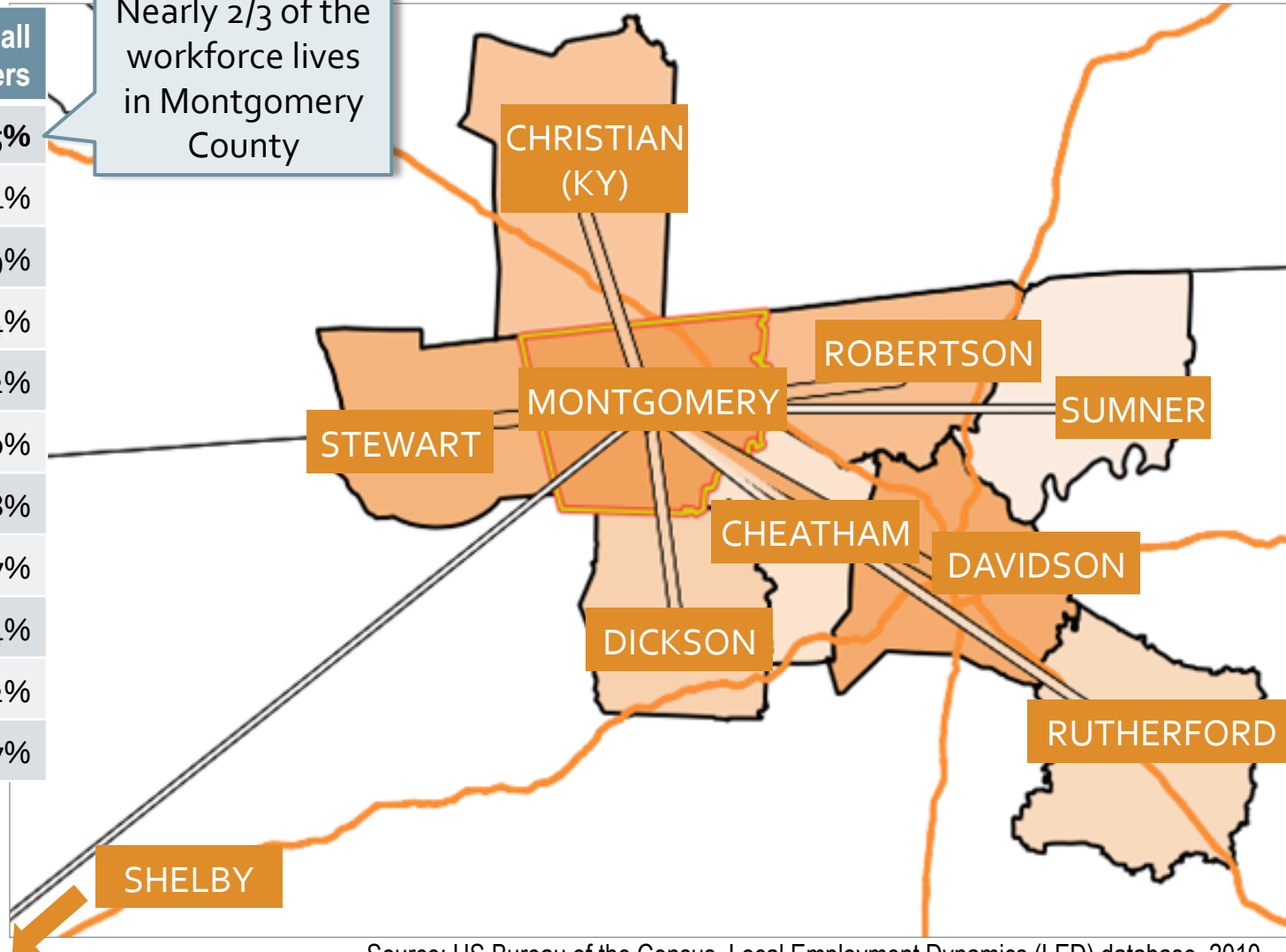
Montgomery County workforce

TOP 10 COUNTIES OF RESIDENCE

16

Nearly 2/3 of the workforce lives in Montgomery County

County	Share of all workers
Montgomery	63.5%
Davidson	4.1%
Stewart	2.9%
Robertson	2.4%
Christian (KY)	2.2%
Dickson	2.0%
Rutherford	1.8%
Cheatham	1.7%
Sumner	1.4%
Shelby	1.2%
All others	16.7%



Source: US Bureau of the Census, Local Employment Dynamics (LED) database, 2010

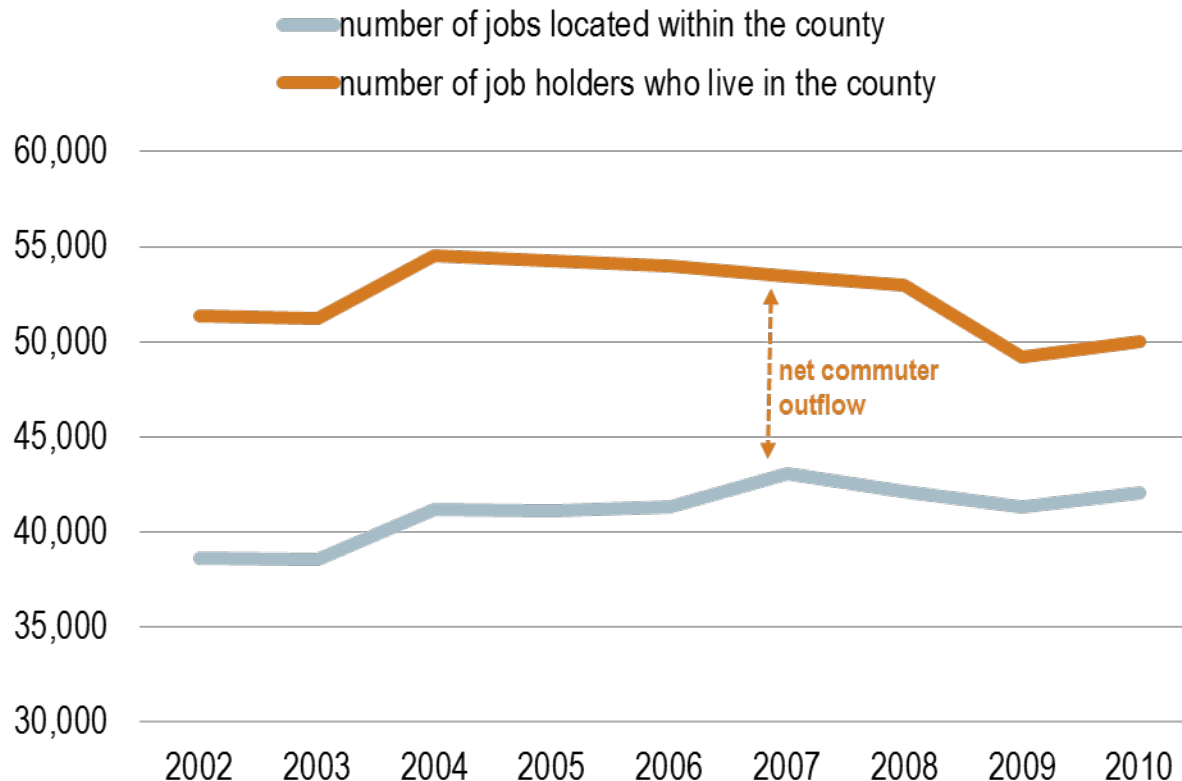
Still a net exporter of workers

THOUGH THE GAP IS NARROWING

17

NET COMMUTER OUTFLOW FROM MONTGOMERY COUNTY

Fewer covered jobs in the county than employed residents



Factors potentially affecting commuting patterns:

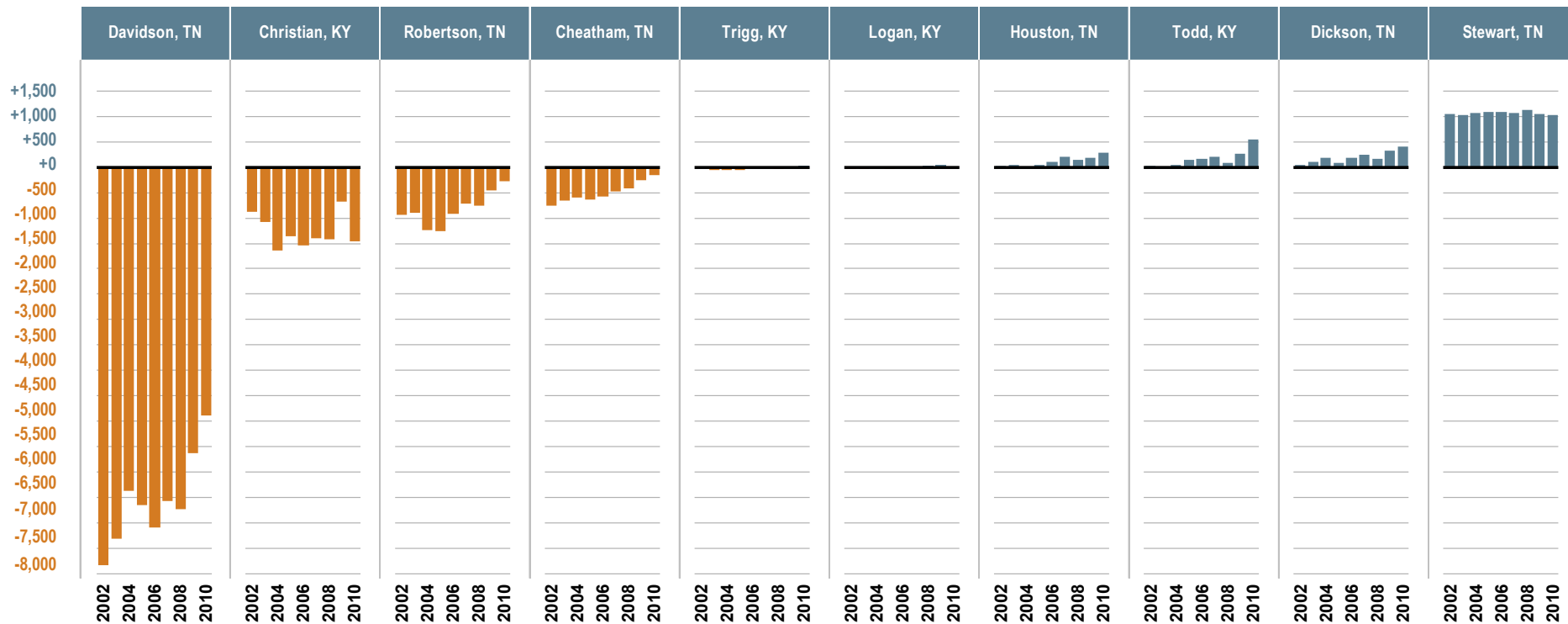
- Increase in employment opportunities in the county
- Economic conditions
- Cost factors, e.g., fuel prices
- Job base

Montgomery County

NET COMMUTER FLOW

RELATIONSHIP TO OTHER LABOR SHED COUNTIES, 2002-2010

Total net commuter *inflow* (*outflow*)



NOTE: Jobs data shown here are drawn from covered employment records; jobs not covered by unemployment insurance programs are omitted from the analysis.

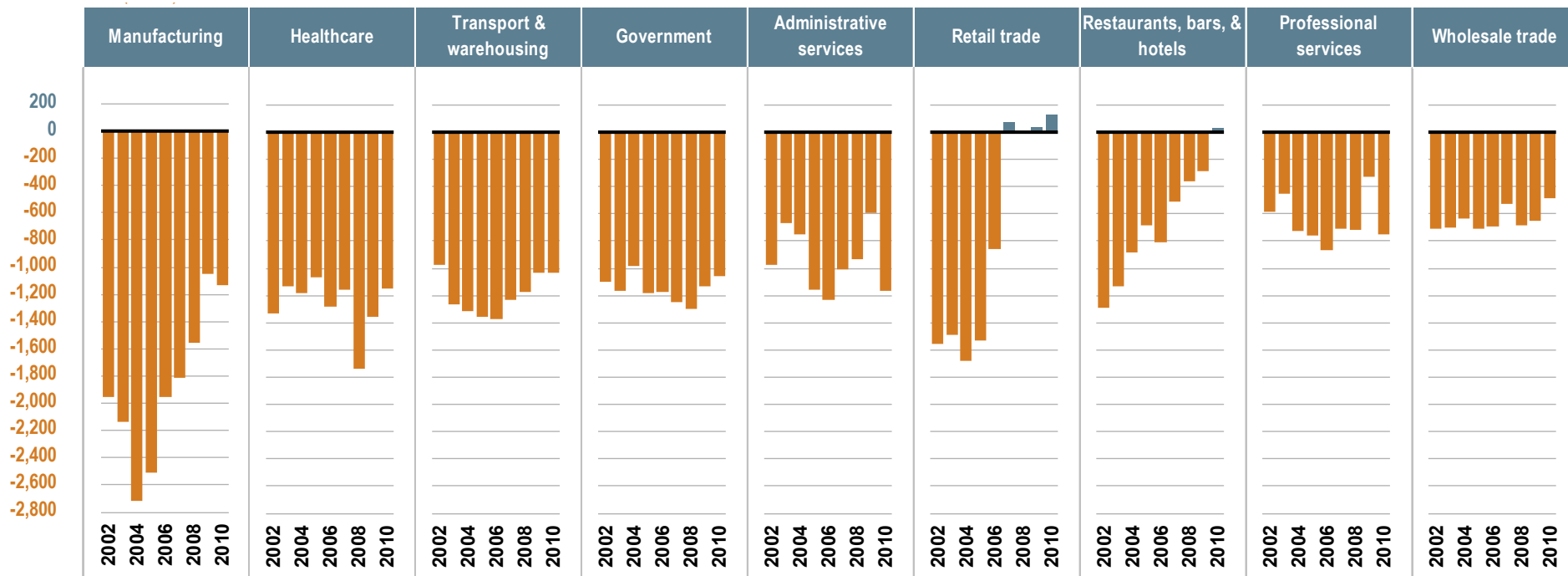
Montgomery County

NET COMMUTER FLOW

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FLOWS BY SELECTED ECONOMIC SECTOR, 2002-2010

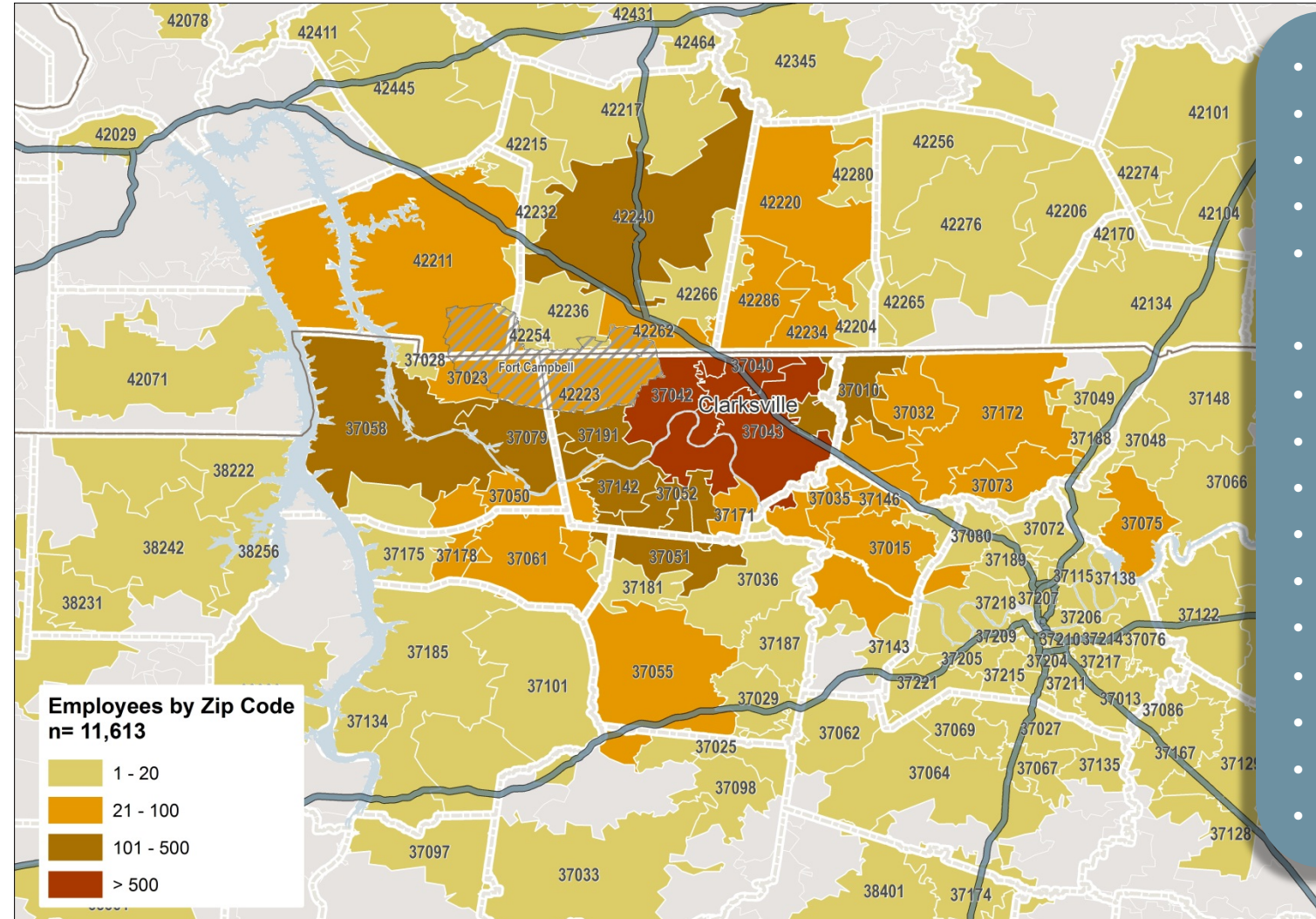
Total net commuter *inflow* (*outflow*)



ZIP Code mapping

16 EMPLOYERS REPRESENTING 11,613 WORKERS

20



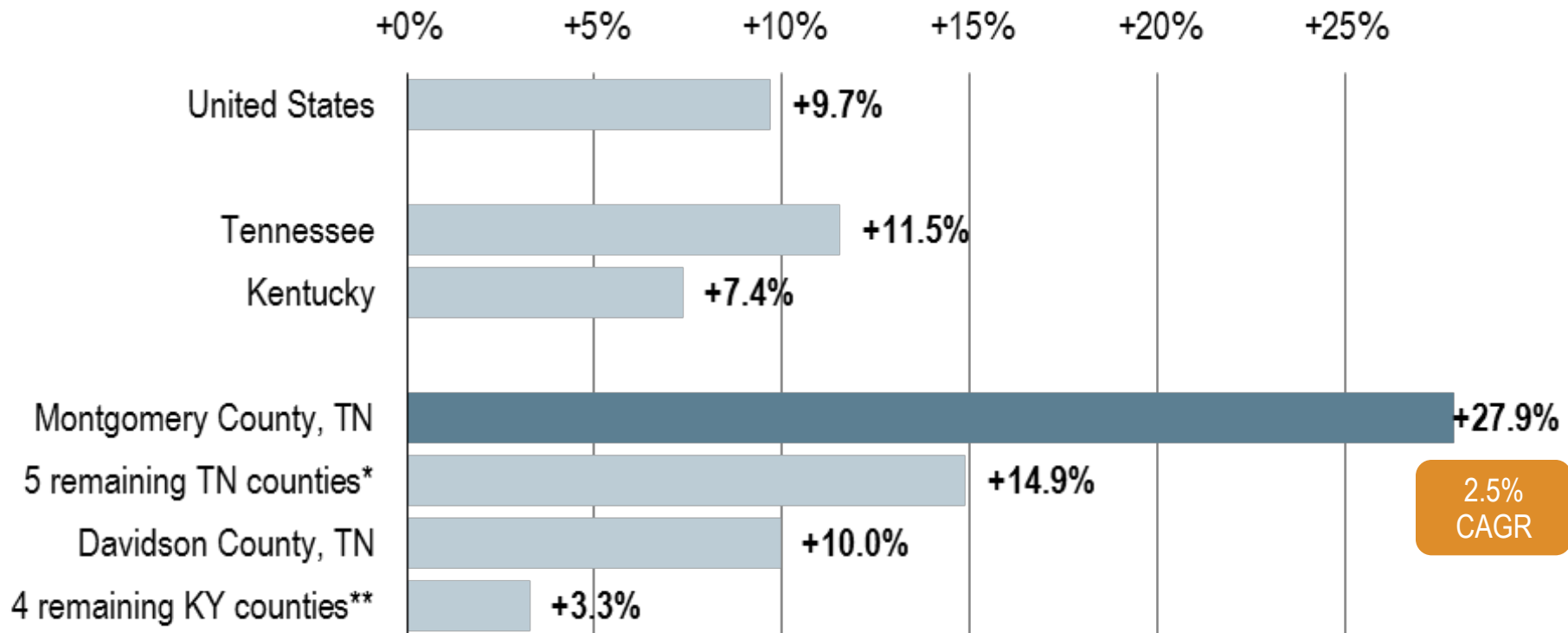
- Akebono
- Austin Peay State Univ.
- Bridgestone Metalpha
- City of Clarksville
- Clarksville Montgomery County School System
- Cumberland Electric
- Florim USA
- Hemlock
- Hendrickson
- Jostens
- Montgomery County
- MW/MB, LLC
- Nystar
- Rivers End Trading
- Spear USA
- Trane

Source: TIP Strategies, mapped using aggregate data on ZIP Code of residence provided by listed employers:

Census revealed dramatic growth

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PERCENT CHANGE IN POPULATION, 2000 -2010



Source: US Census Bureau, SF1 data for 2000 and 2010. Net change calculated by TIP Strategies.

*The other 5 Tennessee counties are Cheatham, Dickson, Houston, Robertson, & Stewart

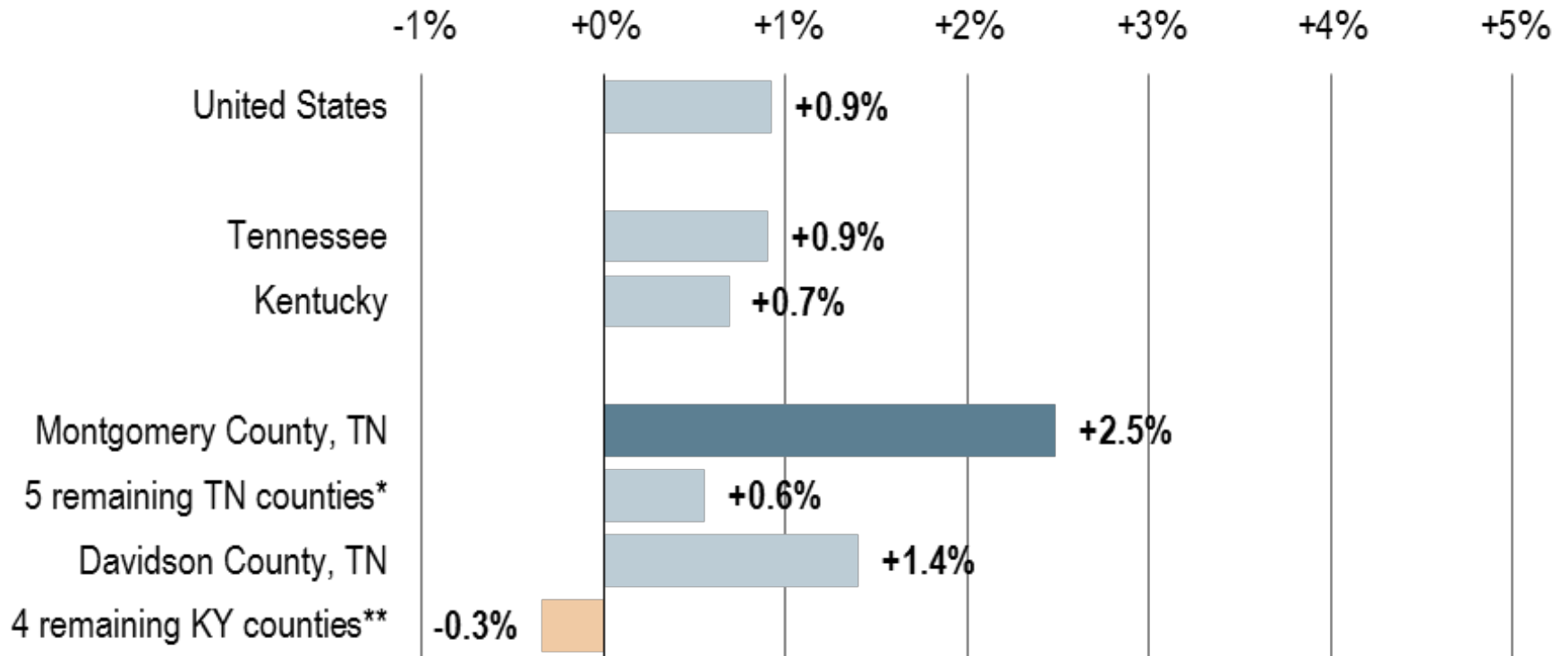
**The 4 Kentucky counties are Christian, Logan, Todd, & Trigg

CAGR = compound annual growth rate

Pace of growth continues

22

PERCENT CHANGE IN POPULATION, 2010 -2011



Source: US Census Bureau, SF1 data for 2000 and 2010. Net change calculated by TIP Strategies.

*The other 5 Tennessee counties are Cheatham, Dickson, Houston, Robertson, & Stewart

**The 4 Kentucky counties are Christian, Logan, Todd, & Trigg

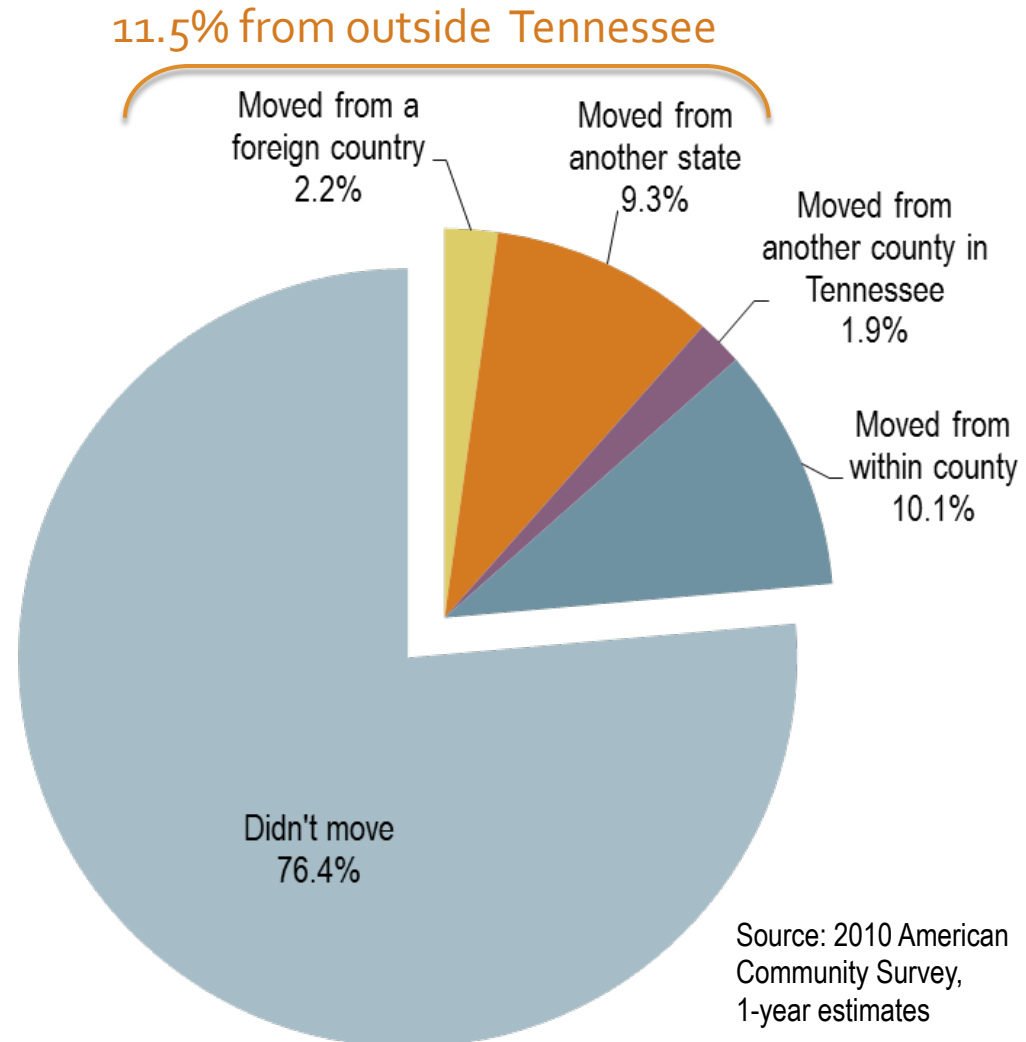
~1 in 7 residents is new to county

RESIDENCE ONE YEAR AGO FOR MONTGOMERY COUNTY POP., 2010

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Roughly $\frac{1}{4}$ of Montgomery County residents age 1 year and older (23.6%) lived in a different location in 2009 than the one they called home in 2010.

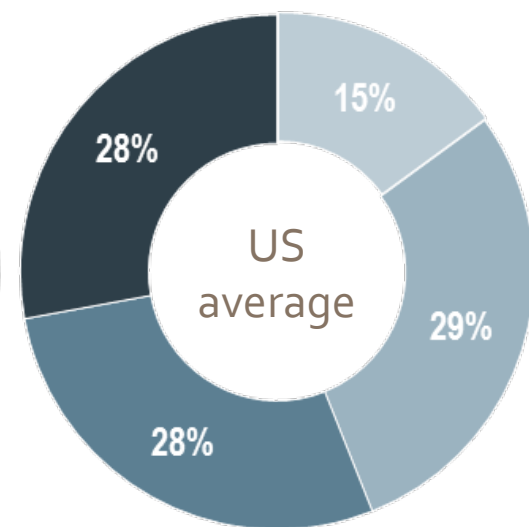
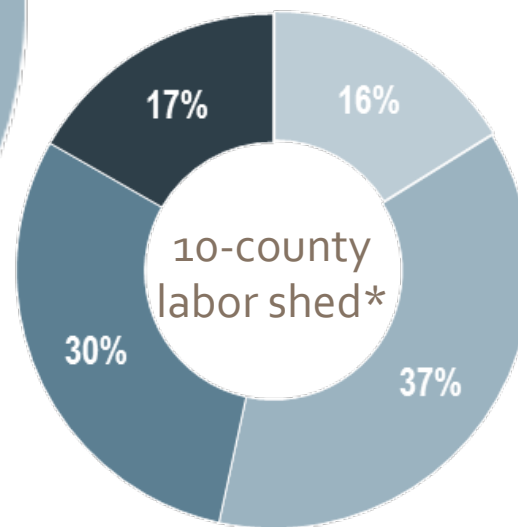
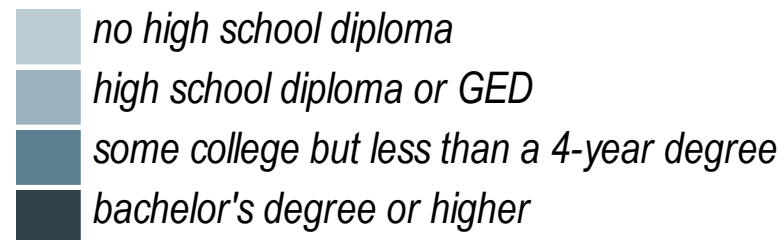
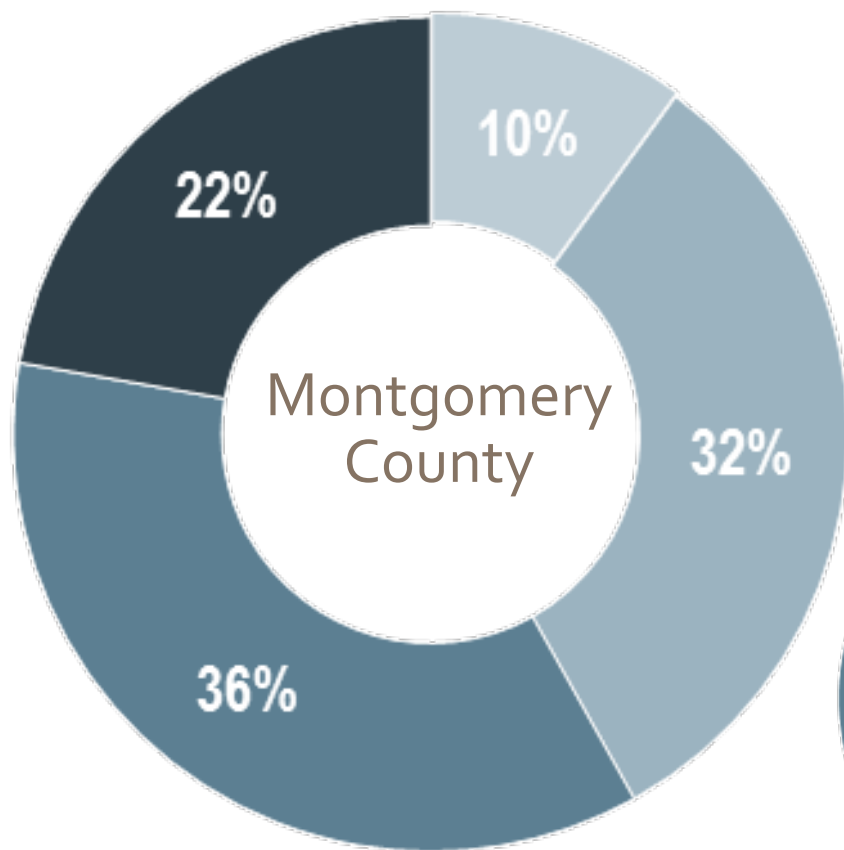
- 10.1% moved from another location in Montgomery County.
- 13.5% moved in from outside the county, most from outside the state.



More likely to have some college ...

...BUT LESS LIKELY TO HAVE A 4-YEAR DEGREE (relative to US average)

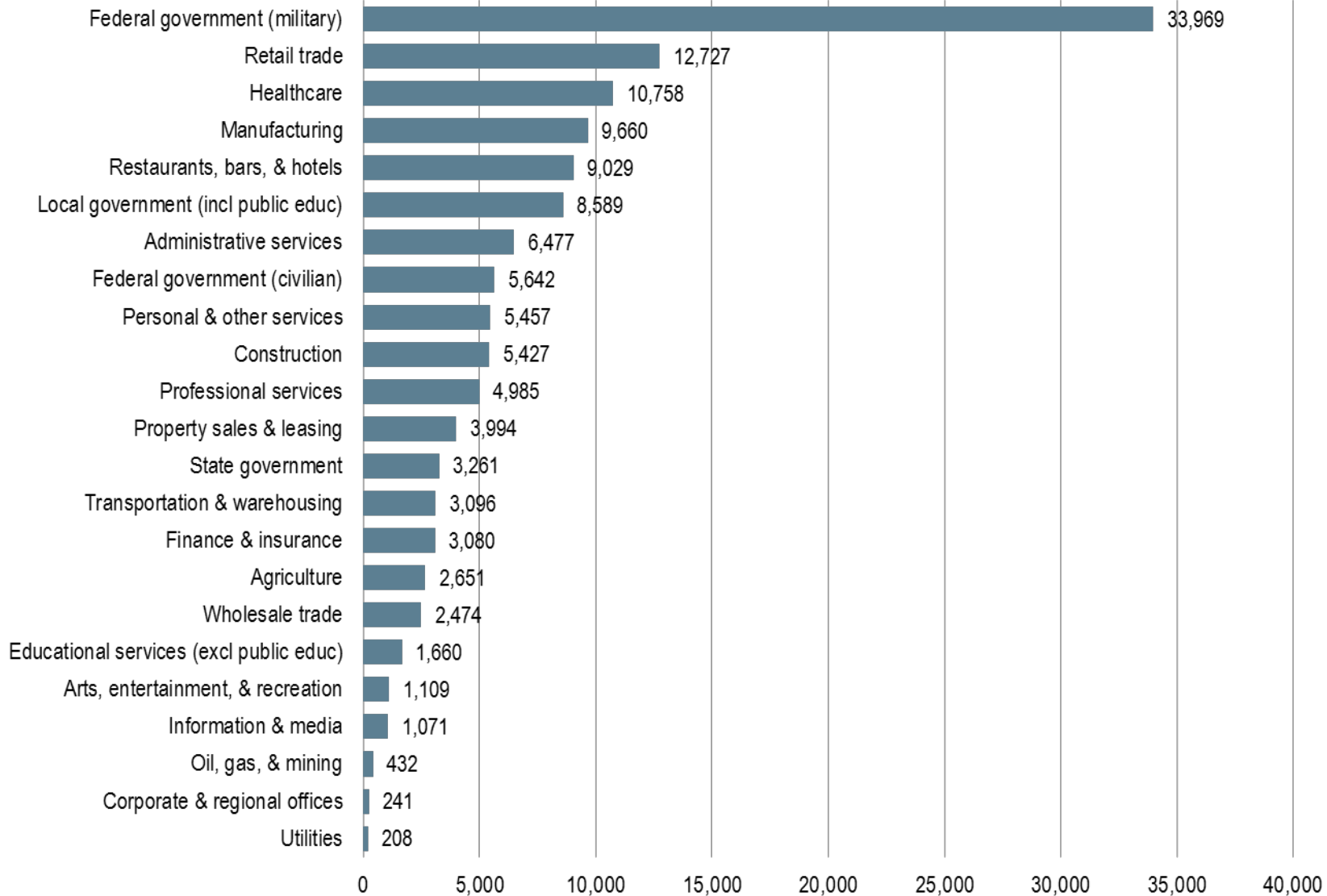
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SOURCES: U.S. Census Bureau (American Community Survey, 2006-2010 average) *Includes Montgomery County.

Local employment by sector, 2011

MONTGOMERY (TN) & CHRISTIAN (KY) COUNTIES

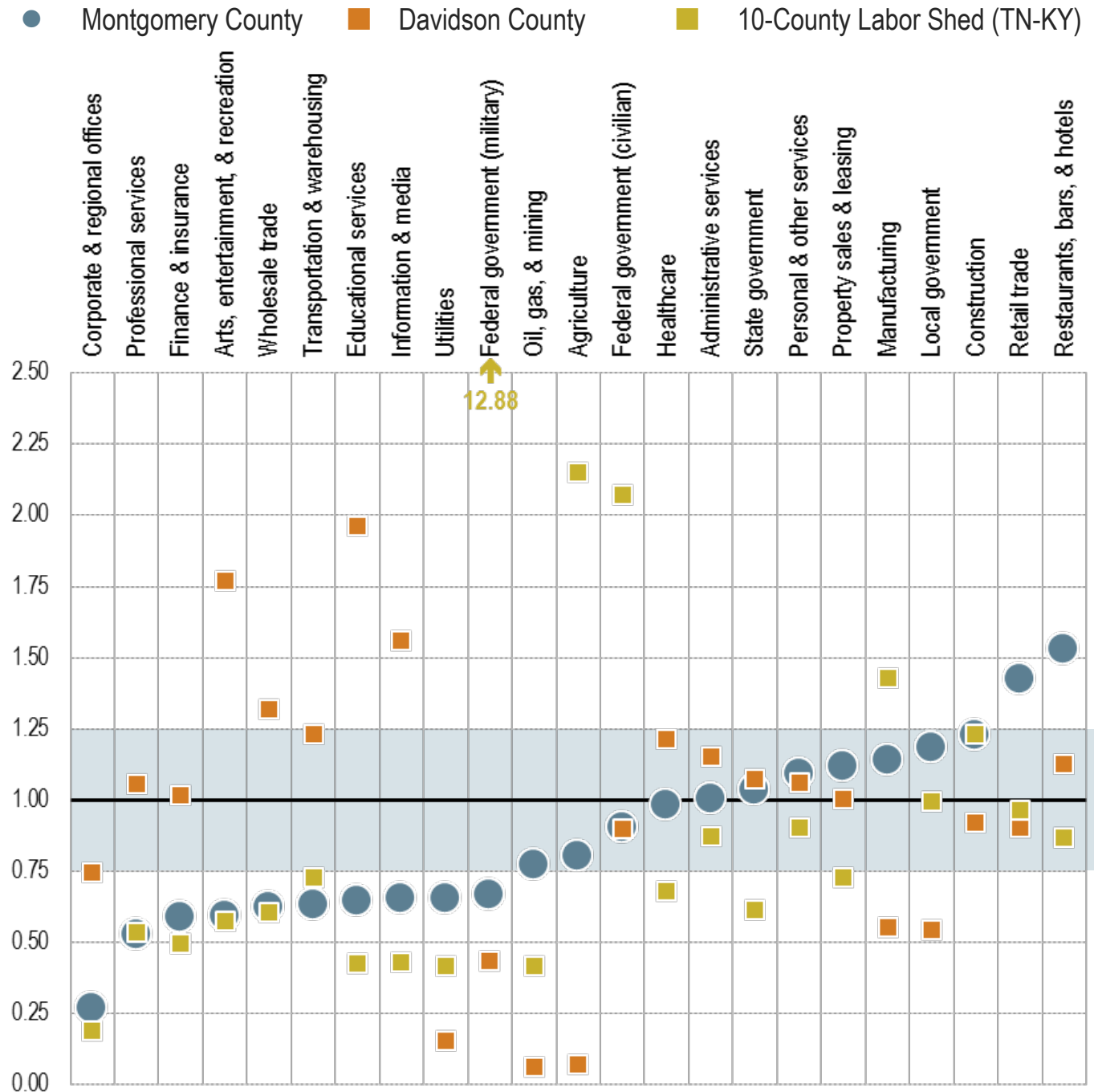


Source: EMSI
Complete
Employment -
2011.4

Location quotient (LQ) analysis

US average for each industry = 1.00;
 regional strength > 1.25; regional weakness < 0.75

Source: EMSI Complete Employment - 2011.4



Target industries

LABOR CAPACITY SCENARIOS

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- Generally well-suited to local workforce
- A few occupations where supply could be an issue
- Wages could be a recruitment challenge for some occupations

- ✓ Automotive
- ✓ Distribution & logistics
- ✓ Business process outsourcing (“back office”)
- ✓ Alternative energy

Automotive scenario

AUTO PARTS PLANT, 500 JOBS

28

Labor capacity scenario: **Auto parts plant, 500 jobs**

Top 20 jobs impacted under specified scenario, ranked by estimated number of new jobs that would be created

SOC code	Description	REGIONAL CAPACITY			MONTGOMERY COUNTY IMPACT			
		Montgomery County	10-county labor shed (includes Montgomery)	Davidson County	Existing jobs at 2011-year end in:	Estimated new jobs created	Montgomery median wage rate	Local median as a % of US average
1	51-2092 Team assemblers	1,072	4,455	2,732	91	\$16.27	125%	Moderate-term OJT
2	51-4041 Machinists	93	509	575	23	\$18.16	100%	Long-term OJT
3	51-4031 Cutting, punching, and press machine workers, metal and plastic	152	873	514	18	\$16.90	121%	Moderate-term OJT
4	51-9061 Inspectors, testers, sorters, samplers, and weighers	155	880	1,269	18	\$16.03	104%	Moderate-term OJT
5	51-1011 First-line supervisors/mgrs of production and operating workers	245	1,200	1,844	16	\$23.51	96%	Related work experience
6	51-4011 Computer-controlled machine tool operators, metal and plastic	47	180	76	15	\$16.96	102%	Moderate-term OJT
7	17-2112 Industrial engineers	65	309	324	14	\$33.97	96%	Bachelor's degree
8	51-2099 Assemblers and fabricators, all other	48	676	865	13	\$9.20	68%	Moderate-term OJT
9	51-4111 Tool and die makers	16	170	161	12	—	—	Long-term OJT
10	51-4081 Multiple machine tool workers, metal and plastic	37	165	76	11	\$15.26	101%	Moderate-term OJT
11	53-7062 Laborers and freight, stock, and material movers, hand	666	2,884	10,852	10	\$11.63	105%	Short-term OJT
12	17-2141 Mechanical engineers	21	195	304	10	\$28.25	78%	Bachelor's degree
13	51-2031 Engine and other machine assemblers	14	54	12	10	—	—	Short-term OJT
14	53-7051 Industrial truck and tractor operators	260	1,156	2,014	9	\$14.71	104%	Short-term OJT
15	49-9042 Maintenance and repair workers, general	669	2,090	5,462	9	\$16.12	101%	Moderate-term OJT
16	43-5071 Shipping, receiving, and traffic clerks	161	663	2,473	9	\$15.60	115%	Short-term OJT
17	51-4122 Welding, soldering, and brazing machine workers	30	125	38	8	\$15.93	99%	PS vocational award
18	49-9041 Industrial machinery mechanics	109	534	461	8	\$19.88	94%	Long-term OJT
19	51-4121 Welders, cutters, solderers, and brazers	201	946	803	8	\$17.32	102%	PS vocational award
20	51-2022 Electrical and electronic equipment assemblers	28	195	223	8	\$15.39	112%	Short-term OJT

Sources: EMSI Complete Employment – 2011.4; US Bureau of Labor Statistics, TIP Strategies.

Note: OJT = OJT; PS = postsecondary; — = item not disclosed

Distribution & logistics scenario

WHOLESALE DISTRIBUTOR, 500 JOBS

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Labor capacity scenario: **Wholesale distributor, 500 jobs**

Top 20 jobs impacted under specified scenario, ranked by estimated number of new jobs that would be created

SOC code	Description	REGIONAL CAPACITY			MONTGOMERY COUNTY IMPACT			
		Existing jobs at 2011-year end in:			Estimated new jobs created	Montgomery median wage rate	Local median as a % of US average	Skill preparation required
Montgomery County	10-county labor shed (includes Montgomery)	Davidson County						
1	41-4012 Sales reps., wholesale and mfg., except tech/scientific products	344	1,125	4,325	83	\$20.23	83%	Related work experience
2	53-7062 Laborers and freight, stock, and material movers, hand	666	2,884	10,852	33	\$11.63	105%	Short-term OJT
3	41-4011 Sales reps., wholesale and mfg., technical and scientific products	36	257	2,835	20	\$28.02	83%	Related work experience
4	53-3032 Truck drivers, heavy and tractor-trailer	726	2,906	8,532	18	\$14.92	83%	Short-term OJT
5	43-5081 Stock clerks and order fillers	994	2,750	6,936	17	\$9.03	89%	Short-term OJT
6	43-4051 Customer service representatives	1,875	3,716	10,535	16	\$11.15	77%	Moderate-term OJT
7	43-9061 Office clerks, general	932	2,801	11,891	15	\$10.72	87%	Short-term OJT
8	43-5071 Shipping, receiving, and traffic clerks	161	663	2,473	14	\$15.60	115%	Short-term OJT
9	11-1021 General and operations managers	452	1,640	7,419	14	\$30.53	72%	Degree plus experience
10	53-3033 Truck drivers, light or delivery services	445	1,323	3,325	14	\$10.93	80%	Short-term OJT
11	43-3031 Bookkeeping, accounting, and auditing clerks	624	2,077	6,188	12	\$13.00	84%	Moderate-term OJT
12	53-3031 Driver/sales workers	542	1,119	1,852	11	\$7.94	67%	Short-term OJT
13	43-6014 Secretaries, except legal, medical, and executive	534	1,748	6,524	9	\$9.75	70%	Moderate-term OJT
14	41-1012 First-line supervisors/managers of non-retail sales workers	326	1,181	3,004	8	\$16.66	71%	Related work experience
15	53-7051 Industrial truck and tractor operators	260	1,156	2,014	8	\$14.71	104%	Short-term OJT
16	53-7064 Packers and packagers, hand	310	1,075	2,184	7	\$9.98	107%	Short-term OJT
17	43-4151 Order clerks	72	179	528	7	\$11.94	88%	Short-term OJT
18	43-1011 First-line supervisors/mgrs. of office and admin. support workers	577	1,583	6,321	7	\$16.01	73%	Related work experience
19	11-2022 Sales managers	123	377	1,659	6	\$30.33	74%	Degree plus experience
20	51-2092 Team assemblers	1,072	4,455	2,732	5	\$16.27	125%	Moderate-term OJT

Sources: EMSI Complete Employment – 2011.4; US Bureau of Labor Statistics, TIP Strategies.

Note: OJT = on-the-job training; PS = postsecondary; — = item not disclosed

Business process outsourcing scenario

PAYROLL PROCESSING, 500 JOBS

30

Labor capacity scenario: **Payroll processing, 500 jobs**

Top 20 jobs impacted under specified scenario, ranked by estimated number of new jobs that would be created

SOC code	Description	REGIONAL CAPACITY			MONTGOMERY COUNTY IMPACT			
		<i>Existing jobs at 2011-year end in:</i>			Estimated new jobs created	Montgomery median wage rate	Local median as a % of US average	Skill preparation required
Montgomery County	10-county labor shed (includes Montgomery)	Davidson County						
1	43-4051 Customer service representatives	1,875	3,716	10,535	120	\$11.15	77%	Moderate-term OJT
2	41-9041 Telemarketers	162	228	1,051	84	\$12.69	123%	Short-term OJT
3	43-3011 Bill and account collectors	68	202	1,796	64	\$13.43	92%	Short-term OJT
4	43-1011 First-line supervisors/mgrs. of office and admin. support workers	577	1,583	6,321	20	\$16.01	73%	Related work experience
5	43-9061 Office clerks, general	932	2,801	11,891	13	\$10.72	87%	Short-term OJT
6	43-2011 Switchboard operators, including answering service	49	115	696	12	\$10.02	85%	Short-term OJT
7	43-9051 Mail clerks and mail machine operators, except postal service	33	100	398	12	\$10.45	85%	Short-term OJT
8	41-3099 Sales representatives, services, all other	128	401	2,003	11	\$17.14	79%	Related work experience
9	43-9071 Office machine operators, except computer	24	47	211	10	\$11.05	87%	Short-term OJT
10	11-1021 General and operations managers	452	1,640	7,419	9	\$30.53	72%	Degree plus experience
11	31-9094 Medical transcriptionists	55	160	560	9	\$14.56	114%	PS vocational award
12	41-2021 Counter and rental clerks	102	301	1,602	7	\$9.60	88%	Short-term OJT
13	15-1041 Computer support specialists	96	318	1,969	6	\$25.32	121%	Associate's degree
14	43-6014 Secretaries, except legal, medical, and executive	534	1,748	6,524	6	\$9.75	70%	Moderate-term OJT
15	43-3031 Bookkeeping, accounting, and auditing clerks	624	2,077	6,188	5	\$13.00	84%	Moderate-term OJT
16	41-1012 First-line supervisors/managers of non-retail sales workers	326	1,181	3,004	5	\$16.66	71%	Related work experience
17	23-2091 Court reporters	<10	22	38	4	—	—	PS vocational award
18	43-3021 Billing and posting clerks and machine operators	126	383	1,842	4	\$13.46	88%	Short-term OJT
19	43-9021 Data entry keyers	52	183	1,166	4	\$10.12	82%	Moderate-term OJT
20	13-1199 Business operation specialists, all other	136	671	2,625	3	\$24.86	88%	Bachelor's degree

Sources: EMSI Complete Employment – 2011.4; US Bureau of Labor Statistics, TIP Strategies.

Note: OJT = on-the-job training; PS = postsecondary; — = item not disclosed

Alternative energy scenario

SOLAR PANEL COMPONENT MFG. PLANT, 500 JOBS

31

Labor capacity scenario: **Solar panel component manufacturing, 500 jobs**

Top 20 jobs impacted under specified scenario, ranked by estimated number of new jobs that would be created

SOC code	Description	REGIONAL CAPACITY			MONTGOMERY COUNTY IMPACT			
		Montgomery County	10-county labor shed (includes Montgomery)	Davidson County	Estimated new jobs created	Montgomery median wage rate	Local median as a % of US average	Skill preparation required
1	51-2022 Electrical and electronic equipment assemblers	28	195	223	66	\$15.39	112%	Short-term OJT
2	51-9141 Semiconductor processors	<10	<10	11	26	—	—	PS vocational award
3	17-3023 Electrical and electronic engineering technicians	16	100	290	24	\$24.56	95%	Associate's degree
4	51-9061 Inspectors, testers, sorters, samplers, and weighers	155	880	1,269	21	\$16.03	104%	Moderate-term OJT
5	17-2072 Electronics engineers, except computer	14	96	375	20	\$47.62	116%	Bachelor's degree
6	51-2092 Team assemblers	1,072	4,455	2,732	20	\$16.27	125%	Moderate-term OJT
7	17-2071 Electrical engineers	12	80	153	15	\$31.08	80%	Bachelor's degree
8	17-2061 Computer hardware engineers	<10	27	52	15	—	—	Bachelor's degree
9	11-9041 Engineering managers	22	169	412	13	\$44.34	80%	Degree plus experience
10	51-1011 First-line supervisors/mgrs.. of production and operating workers	245	1,200	1,844	13	\$23.51	96%	Related work experience
11	17-2112 Industrial engineers	65	309	324	12	\$33.97	96%	Bachelor's degree
12	15-1032 Computer software engineers, systems software	26	97	540	9	\$32.10	76%	Bachelor's degree
13	11-1021 General and operations managers	452	1,640	7,419	9	\$30.53	72%	Degree plus experience
14	15-1031 Computer software engineers, applications	30	126	1,231	8	\$26.05	66%	Bachelor's degree
15	17-3026 Industrial engineering technicians	38	142	119	7	\$26.14	117%	Associate's degree
16	13-1023 Purchasing agents, except wholesale, retail, and farm products	53	283	646	7	\$23.20	93%	Long-term OJT
17	17-2141 Mechanical engineers	21	195	304	7	\$28.25	78%	Bachelor's degree
18	43-5071 Shipping, receiving, and traffic clerks	161	663	2,473	6	\$15.60	115%	Short-term OJT
19	43-5061 Production, planning, and expediting clerks	73	336	1,145	6	\$19.50	99%	Moderate-term OJT
20	11-3051 Industrial production managers	59	245	262	6	\$35.88	90%	Related work experience

Sources: EMSI Complete Employment – 2011.4; US Bureau of Labor Statistics, TIP Strategies. Shaded occupations indicate that estimated demand exceeds more than one-half of the current regional supply.

Note: OJT = on-the-job training; PS = postsecondary; — = item not disclosed

Issues from employer interviews

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- ❑ Soft skills are a challenge, though military workforce is typically an exception.
- ❑ Skilled labor, engineering, and supervisory experience are in demand.
- ❑ Military skills not always viewed as directly transferrable to civilian jobs.
- ❑ The expansion of postsecondary training in the region offers a unique opportunity.
- ❑ Quality of place assets remain important to talent attraction and retention.

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Fort Campbell / Veterans Inventory

Fort Campbell analysis

DATA ON 33,041 ACTIVE DUTY PERSONNEL, JUNE 2012

Figure 64: Military occupations by standard occupational classification (SOC) code—**Enlisted personnel**

Excludes occupations with fewer than 10 workers, ranked by number of personnel

MOS	MOS Description	Military Personnel Category	Number of Personnel	SOC Code	SOC Description  indicates high demand occupation	
1	91B Medical Specialist	Enlisted	1,400	29-2041	Emergency Medical Technicians and Paramedics	
2	68W Health Care Specialist	Enlisted	1,395	29-2041	Emergency Medical Technicians and Paramedics	
3	88M Motor Transport Operator	Enlisted	1,336	53-3032	Heavy and Tractor-Trailer Truck Drivers	
4	92A Automated Logistical Specialist	Enlisted	976	43-5081	Stock Clerks and Order Fillers	
5	92Y Unit Supply Specialist	Enlisted	914	43-5081	Stock Clerks and Order Fillers	
6	31B Military Police	Enlisted	825	33-3051	Police and Sheriff's Patrol Officers	
7	92F Petroleum Supply Specialist	Enlisted	793	53-7072	Pump Operators, Except Wellhead Pumpers	
8	15T UH-60 Helicopter Repairer	Enlisted	781	49-3011	Aircraft Mechanics and Service Technicians	
9	92G Food Service Specialist	Enlisted	707	35-2012	Cooks, Institution and Cafeteria	
10	42A Human Resources Specialist	Enlisted	658	43-4161	Human Resources Ass'ts., Except Payroll and Timekeeping	
11	25U Signal Support Systems Specialist	Enlisted	634	43-2099	Communications Equipment Operators, All Other	
12	12B Combat Engineer	Enlisted	475	47-4099	Construction and Related Workers, All Other	
13	15U CH-47 Helicopter Repairer	Enlisted	470	49-3011	Aircraft Mechanics and Service Technicians	
14	74D Chemical, Biological, Radiological, and Nuclear (CBRN) Specialist	Enlisted	438	47-4041	Hazardous Materials Removal Workers	
15	35F Nuclear Weapons Electronics Specialist	Enlisted	408	49-9069	Precision Instrument and Equipment Repairers, All Other	
16	25B Information Technology Specialist	Enlisted	373	43-9011	Computer Operators	
17	15P Aviation Operations Specialist	Enlisted	300	53-2022	Airfield Operations Specialists	
18	15R AH-64 Attack Helicopter Repairer	Enlisted	275	49-3011	Aircraft Mechanics and Service Technicians	
19	15J OH-58D/Armament/Electrical/Avionics Systems Repairer	Enlisted	268	49-2091	Avionics Technicians	
20	91D Operating Room Specialist	Enlisted	231	29-2055	Surgical Technologists	
21	92W Water Treatment Specialist	Enlisted	215	51-8031	Water/Wastewater Treatment Plant and System Operators	
22	15S OH-58D Helicopter Repairer	Enlisted	214	49-3011	Aircraft Mechanics and Service Technicians	
23	25Q Multichannel Transmission Systems Operator-Maintainer	Enlisted	211	49-2021	Radio, Cellular, and Tower Equipment Installers and Repairers	
24	89B Ammunition Specialist	Enlisted	207	47-5031	Explosives Workers, Ordnance Handling Experts, and Blasters	
25	89D Explosive Ordnance Disposal Specialist	Enlisted	185	47-5031	Explosives Workers, Ordnance Handling Experts, and Blasters	

continued

Sources: Fort Campbell, O-NET, TIP Strategies

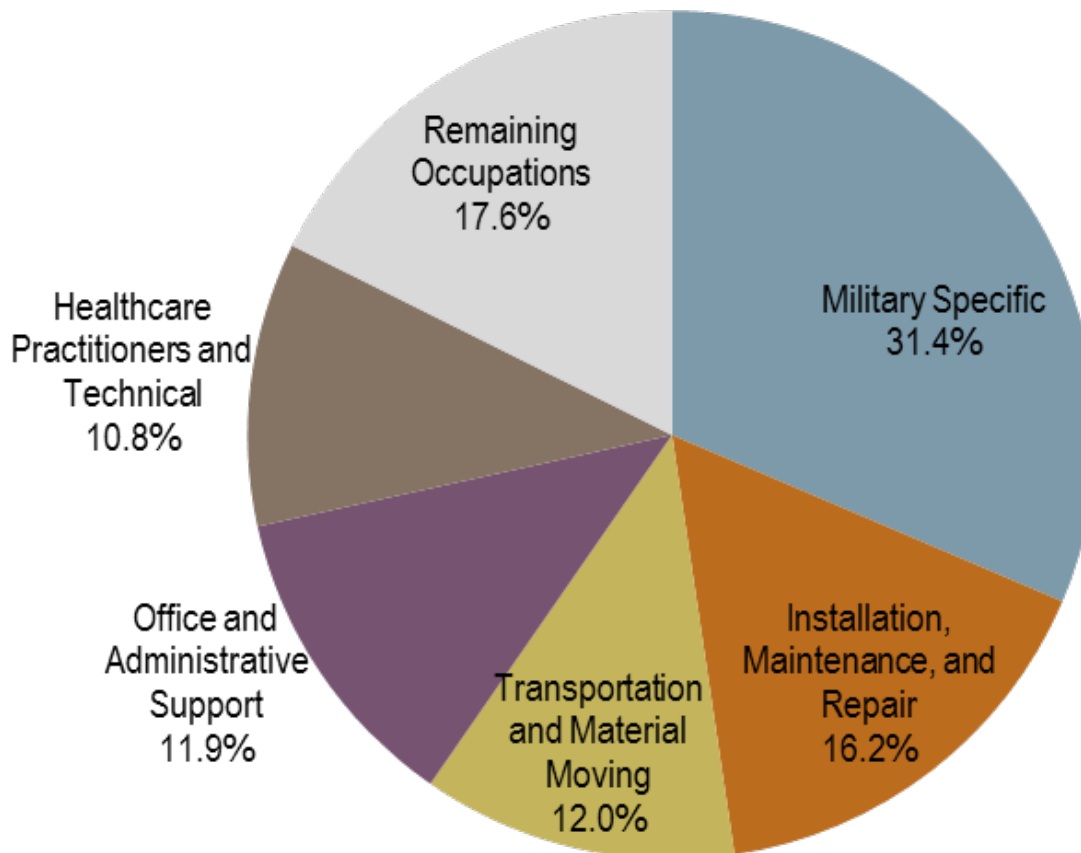
Fort Campbell analysis

~2/3 OF MOS CODES TRANSLATE TO CIVILIAN OCCUPATIONS

35

FORT CAMPBELL ACTIVE DUTY PERSONNEL

By major occupation as of June 2012



- Occupations include several in high demand nationally.
- Expecting 300-500 separations each month due to defense cutbacks and winding down of operations in Afghanistan and Iraq.
- Veterans Inventory provides tool for understanding this labor pool.

Veterans Inventory

SURVEY OF POST-MILITARY SERVICE INTENT

36

- Distributed at Transition Assistance Program (TAP) workshops over 3-month period in early 2012
 - ▣ Designed to assist military personnel in transitioning to civilian careers.
 - ▣ Now mandatory part of out-processing.
- **884 SOLDIERS** completed at least portions of the questionnaire.

SURVEY OF POST-MILITARY SERVICE INTENT

This brief survey is designed to assist economic development and workforce officials in the Clarksville-Montgomery County region in creating expanded employment opportunities for military personnel departing from Fort Campbell and their spouses. Your voluntary assistance in answering the questions below is greatly appreciated.

- How many years of service do you possess?
5 or less 6-10 11-19 20 or more
- What is your primary military occupational specialty (MOS)? _____
- What is your reason for leaving the military?
Retirement ETS/Chapter Medical
- Are you planning to stay in the region (within 30 miles of Fort Campbell) after your service ends?
Yes No Don't know
- Would you stay in the region (within 30 miles) if desirable employment were available?
Yes No Don't know
- What is the highest level of education you have completed?
High school/GED Associates degree Master's degree
Some college Bachelor's degree Ph.D.
- Please mark any area in which you hold a technical/professional certificate.
Advanced Computer
Aviation
Communications/Electronics
Construction
Education/Teaching
Law Enforcement
Logistics/Warehousing/Materials
Mechanical (ASE)
Medical/Healthcare
Transportation (CDL)
Office/Administrative
Other _____
- What type of post-military employment do **YOU** desire?
Administrative/Office
Aviation
Communications/Electronics
Computers/Software
Construction
Education/Teaching
Equipment Maintenance/Repair
Law Enforcement/Security
Management/Business
Manufacturing
Medical/Healthcare
Transportation/Warehousing
- What type of employment does your **SPOUSE** desire?
Administrative/Office
Aviation
Communications/Electronics
Computers/Software
Construction
Education/Teaching
Equipment Maintenance/Repair
Law Enforcement/Security
Management/Business
Manufacturing
Medical/Healthcare
Transportation/Warehousing
- Improvements in which other area would most positively affect your decision to remain in the region?
Higher education offerings Housing
Child care Healthcare
Retail/shopping Entertainment/recreation
Other _____

MOS of separating Soldiers

VETERANS INVENTORY

37

What is your primary military occupational specialty (MOS)?

Area of specialty	Number of responses	Share of total responses
Infantry	173	19.8%
Supply and Services	120	13.7%
Aviation	101	11.6%
Maintenance	82	9.4%
Logistics	66	7.6%
Medical	55	6.3%
Field Artillery	47	5.4%
Signal/Communication	43	4.9%
Corps of Engineers	34	3.9%
Military Police	28	3.2%
Administrative	20	2.3%
Electronic/Missile Maintenance	20	2.3%
Chemical	16	1.8%
Armor	15	1.7%
Intelligence	14	1.6%
Air Defense Artillery	10	1.1%
Other	30	3.4%

Source: Fort Campbell Survey of Post Military Intent, administered to Soldiers separating from service over a three-month period in early 2012

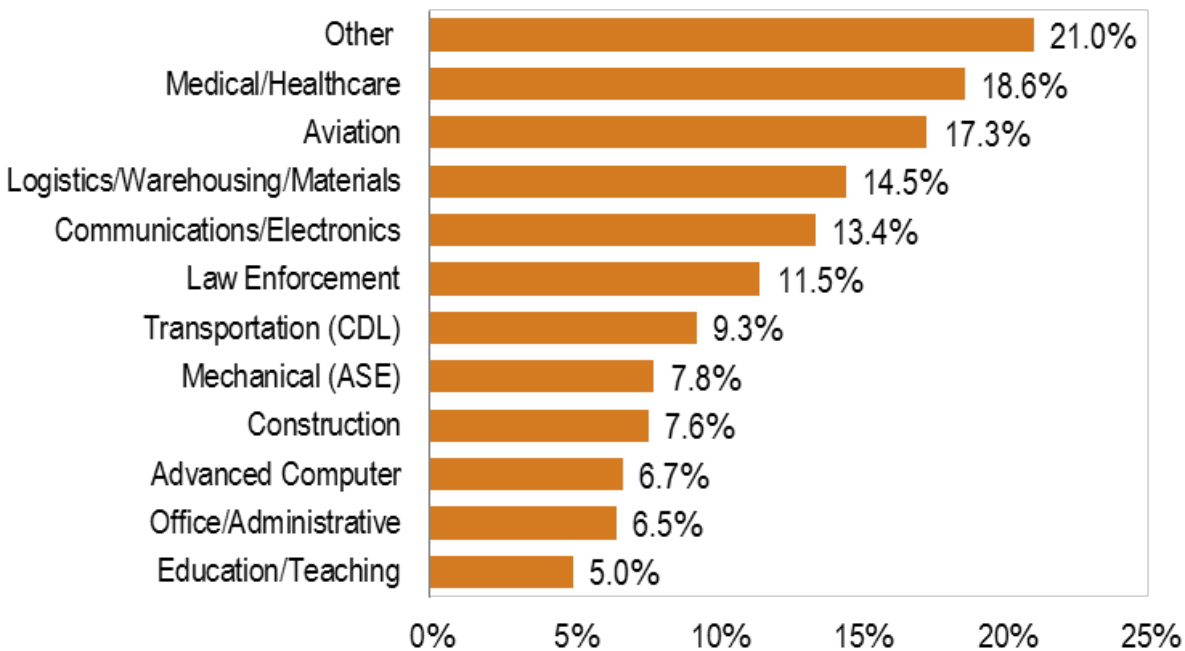
n = 874, 10 skipped

Skills & education

VETERANS INVENTORY

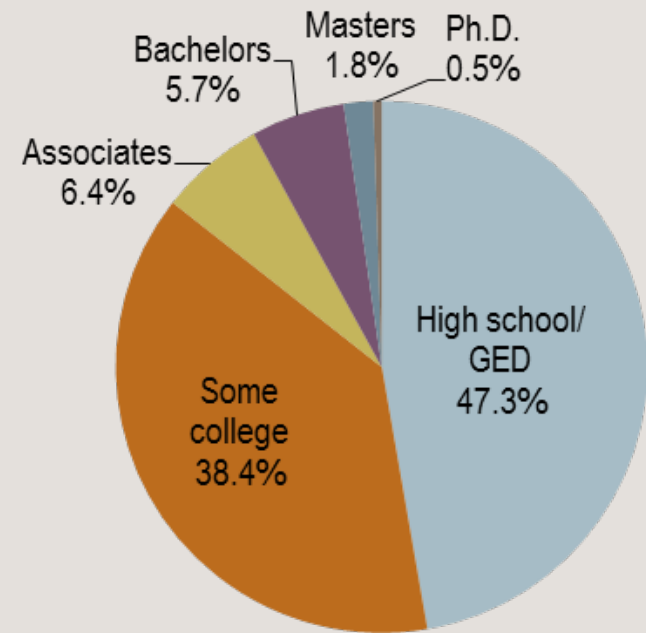
38

Technical/professional certificates held



n = 462

Highest level of education attained



n = 881

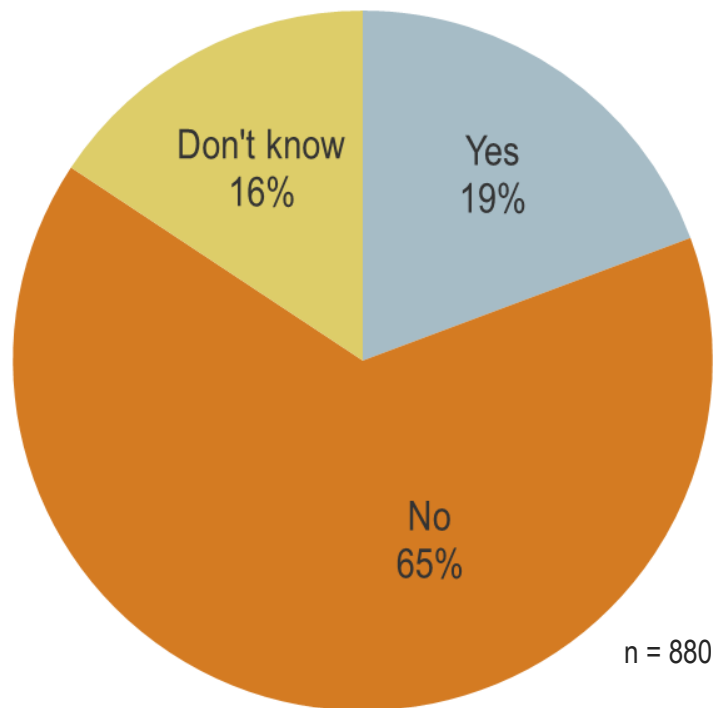
Source (both figures): Fort Campbell Survey of Post Military Intent, administered to Soldiers separating from service over a three-month period in early 2012

Post-military intentions

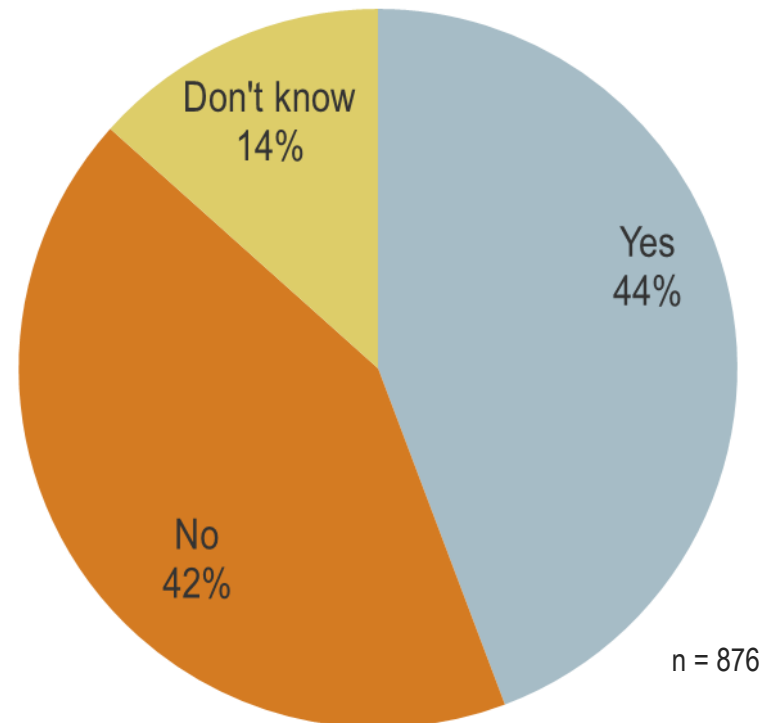
VETERANS INVENTORY

39

Are you planning to stay in the region (within 30 miles of Fort Campbell)?



Would you stay in the region **if desirable employment were available?**



Source (both figures): Fort Campbell Survey of Post Military Intent, administered to Soldiers separating from service over a three-month period in early 2012

Military spouses

SURVEY OF MILITARY SPOUSAL EMPLOYMENT PREFERENCES

40

- Distributed via Family Employment Readiness Program (FERP) office over 3-month period in early 2012
 - ▣ Provides employment assistance to family members of active duty military, DOD civilians, and retirees
- **136 SPOUSES** completed at least portions of the questionnaire.

SURVEY OF MILITARY SPOUSAL EMPLOYMENT PREFERENCES

This brief survey is designed to assist economic development and workforce officials in the Clarksville-Montgomery County region in creating expanded employment opportunities for spouses of military personnel stationed at Fort Campbell. Your voluntary assistance in answering the questions below is greatly appreciated.

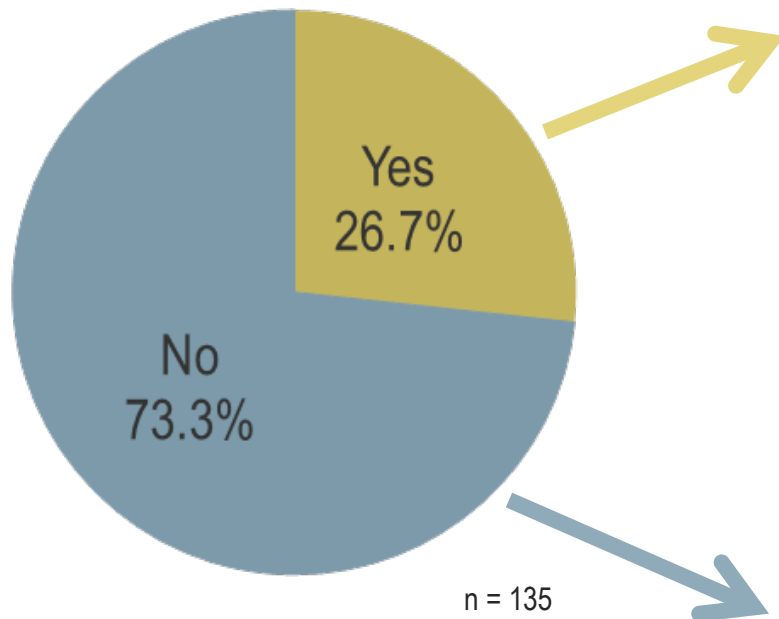
1. What is your gender?
Male _1 Female _2
2. How long have you lived in the Fort Campbell region?
Less than 1 year _1 1-5 years _2 6-10 years _3 More than 10 years _4
3. How far do you currently live from Fort Campbell?
On post _1 Within 10 miles _2 10-20 miles _3 20-30 miles _4 More than 30 miles _5
4. Are you currently employed? Yes _1 No _2
If yes: 4a. Are you satisfied with your current job? Yes _1 No _2
4b. Does your current job match your experience, skills, or education level? Yes _1 No _2
If no: 4c. Have you looked for work in the region? Yes _1 No _2 (Skip to question 5)
4d. How long have you been looking for a job? 1-6 months _1 7-12 months _2 1-2 years _3 More than 2 years _4
5. Are you planning to stay in the region (within commuting distance of Fort Campbell) after your spouse's military service ends?
Yes _1 No _2 Don't know _3
6. Would you stay in the region if desirable employment were available for you and your spouse?
Yes _1 No _2 Don't know _3
7. What is the highest level of education you have completed?
High school/GED _1 Associates degree _2 Master's degree _3
Some college _2 Bachelor's degree _4 Ph.D. _3
9. Please mark any area in which you possess skills or certifications:
Advanced Computer/Software _1
Communications/Electronics _2
Education/Teaching _3
Human Resources _4
Finance/Accounting/Bookkeeping _5
Food Service/Chef _6
Hospitality _7
Manufacturing _8
Marketing/Advertising _9
Medical/Healthcare _10
Sales/Service/Retail _11
Small Business Owner _12
Social Work/Human Services/Public Mgmt. _13
Other _____ _14
10. What type of employment do YOU desire?
Administrative _1
Communications/Electronics _2
Computers/Software _3
Human Resources _4
Education/Teaching _5
Finance/Accounting/Bookkeeping _6
Food Service/Chef _7
Hospitality _8
Management/Business _9
Manufacturing _10
Marketing/Advertising _11
Medical/Healthcare _12
Sales/Service/Retail _13
Social Work/Human Services/Public Mgmt. _14
11. Improvements in which area would most positively affect your long term decision to remain in the region?
Higher education offerings _1
Child care _2
Retail/shopping _3
Other _____ _7
Housing _4
Healthcare _5
Entertainment/recreation _6
Other _____ _7

Untapped resource?

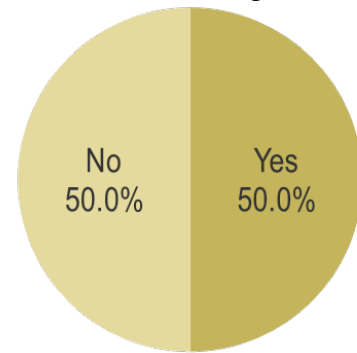
SPOUSAL EMPLOYMENT PREFERENCE SURVEY

41

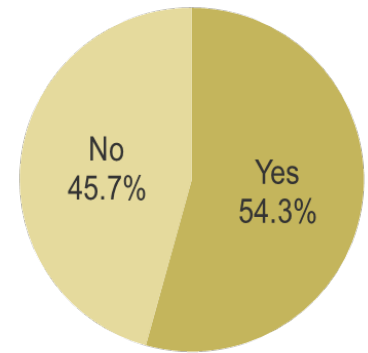
Are you currently employed? (SPOUSES)



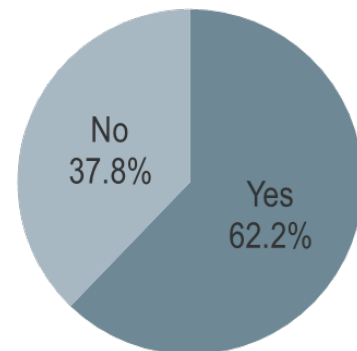
Are you satisfied with current job?



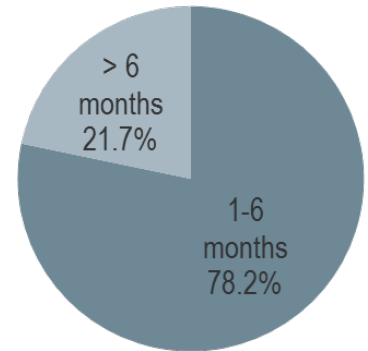
Does it match your skills/experience/education?



Have you looked for work in region?



How long have you been looking?



Source (all figures): Fort Campbell Survey of Military Spousal Employment Preferences, administered to spouses of active duty military personnel over a three-month period in early 2012

n = 90

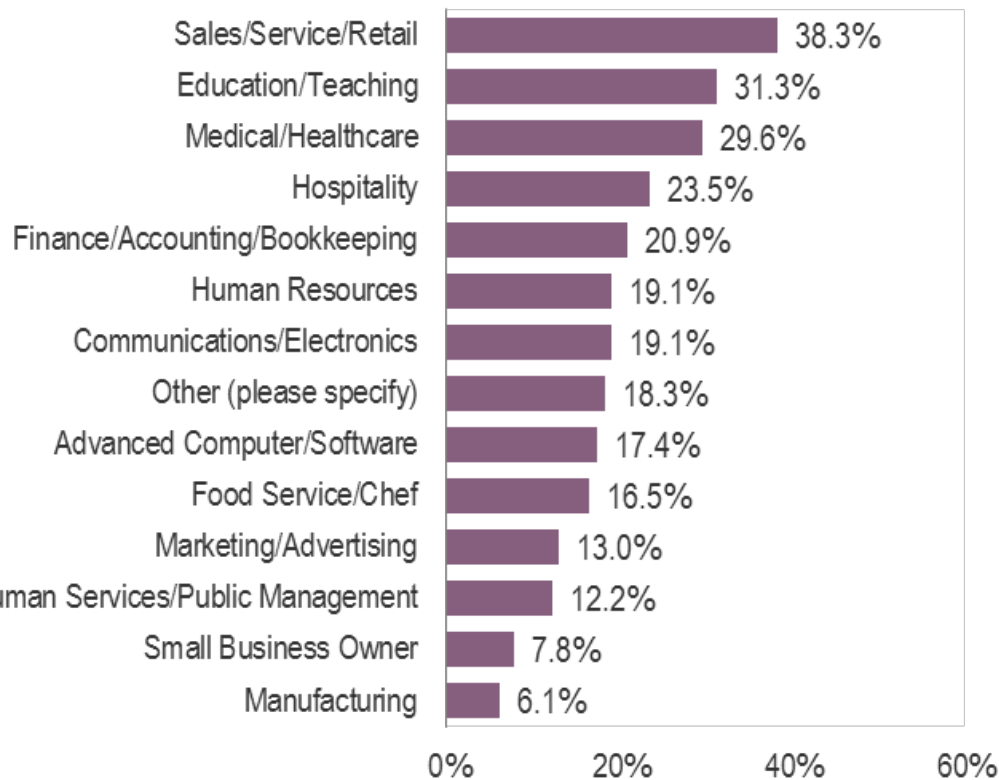
n = 55

Skills & education

SPOUSAL EMPLOYMENT PREFERENCE SURVEY

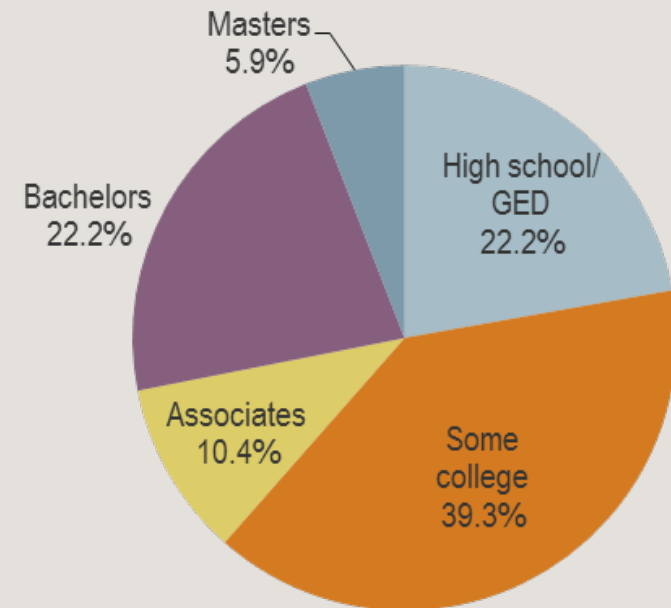
42

Skills/experience (SPOUSES)



n = 115

Highest level of education attained (SPOUSES)



n = 135

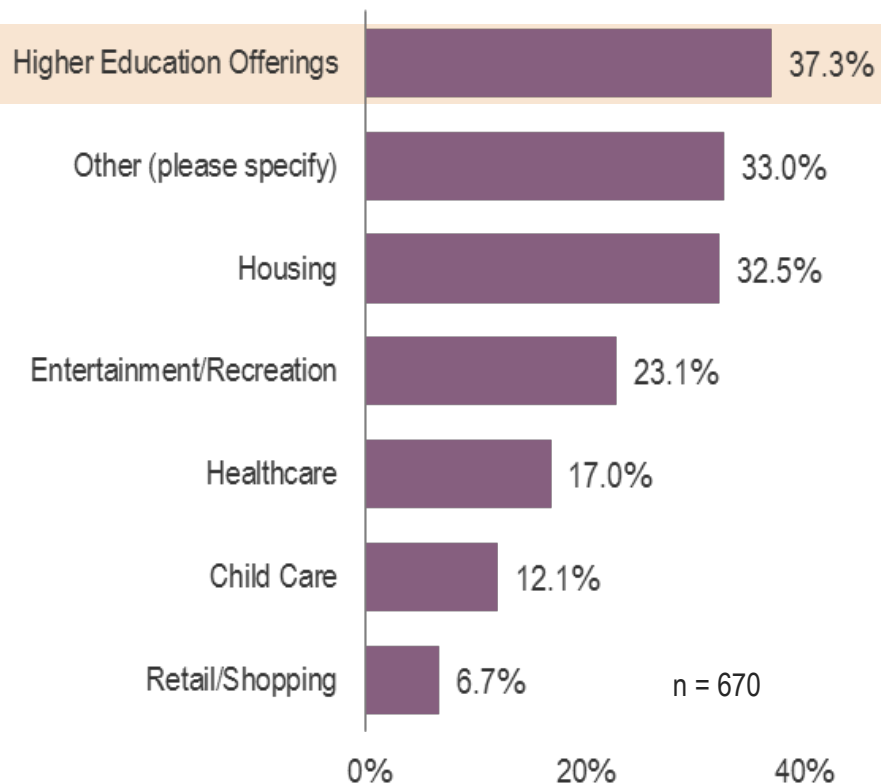
Other factors affecting post-military plans

VETERANS INVENTORY / SPOUSAL PREFERENCE SURVEY

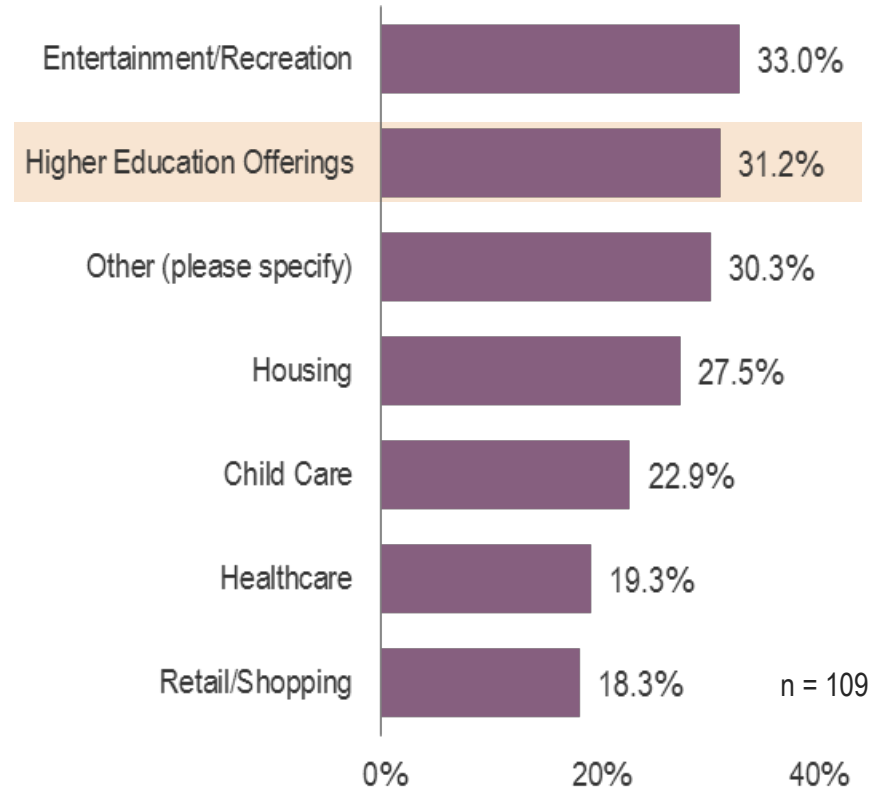
43

What other improvements would most affect your decision?

SOLDIERS



SPOUSES



Sources: Fort Campbell Survey of Post Military Intent, administered to Soldiers separating from service over a three-month period in early 2012; Fort Campbell Survey of Military Spousal Employment Preferences, administered to spouses of active duty military personnel over a three-month period in early 2012

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Recommendations

Recommendations

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- Veterans / Fort Campbell-related
 - Consider formalizing the Veterans' Inventory.
 - Promote Veteran employment programs among area employers.
 - Help connect Veterans and military spouses with entrepreneurship resources.
 - Continue to work closely with Fort Campbell personnel to help ensure a smooth transition.
 - Maintain support for Citizens for Fort Campbell.

Recommendations

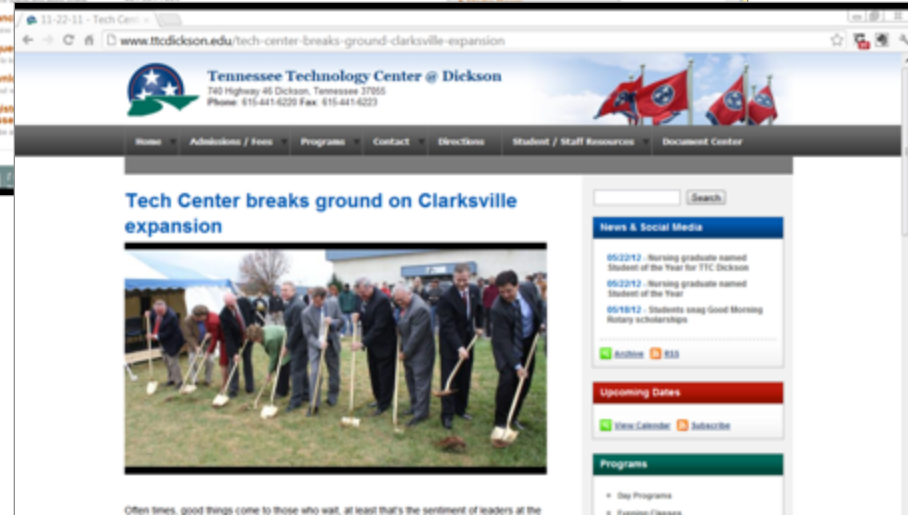
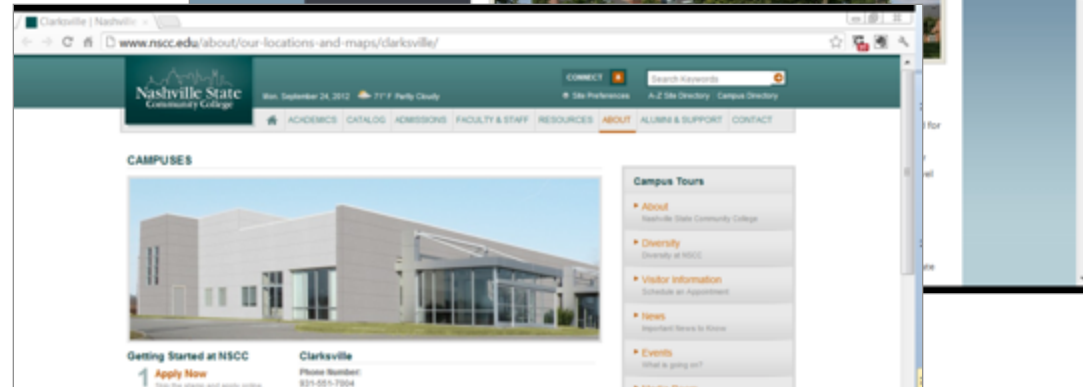
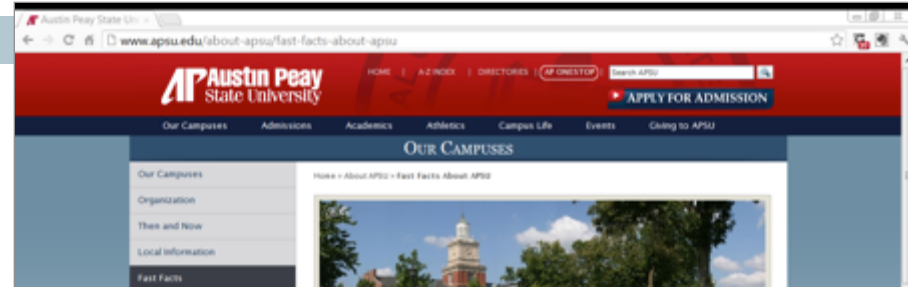
- Education and training
 - ▣ Continue to highlight the importance of soft skills.
 - ▣ Work with Nashville State Community College to refine offerings at Clarksville Campus.
 - ▣ Work with community leaders to address growth management concerns and maintain quality of place.

Postsecondary opportunities

REGION IS WELL-POSITIONED FOR FUTURE

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- Full complement of institutions: 4-year university, community college, and technical training
- Nationally recognized programs
- Opportunity to customize offerings at both NSCC and TTC Dickson



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Questions?

THANK YOU

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