

# **LABOR MARKET ASSESSMENT FOR THE WEST CENTRAL TEXAS REGION**

Prepared for:

**DEVELOPMENT CORPORATION OF ABILENE INC.**

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Prepared by:

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## INTRODUCTION

This labor market evaluation is the product of a contract between the Wadley-Donovan Group (WDG) and the Development Corporation of Abilene, Inc. (DCOA). It is a summary of the labor market resources of a 19-county region in West Central Texas using data obtained through two WDG-conducted surveys of labor-related issues among employers and households in the region; interviews with representative employers, educators, elected officials, staffing services, and state labor officials; and a review of key statistical and other secondary-source information. The 19-county region consists of Taylor, Brown, Comanche, Coleman, Mitchell, Nolan, Runnels, Fisher, Kent, Scurry, Stonewall, Haskell, Jones, Knox, Shackelford, Stephens, Throckmorton, Callahan, and Eastland Counties. The employer survey was designed to gather information from area employers on the availability, quality, and cost of labor, and to gather insights on labor demand and training needs. The primary purpose of the household survey was to quantify and profile the characteristics of the region's regular labor force and its hidden labor reserve. Both surveys were produced in collaboration with Younger Associates, based in Jackson, TN, which specializes in business-to-business and business-to-consumer surveys. The interviews and secondary data supplemented this information.

This document is designed to present an objective labor market assessment of the region and individual sub-regions. For this analysis, the 19 counties were divided into the following sub-regions by the DCOA:

- Abilene sub-region: Taylor County
- Brownwood sub-region: Brown County, Comanche County, Coleman County
- Sweetwater sub-region: Mitchell County, Nolan County, Runnels County
- Snyder sub-region: Fisher County, Kent County, Scurry County, Stonewall County
- Haskell sub-region: Haskell County, Jones County, Knox County
- Breckenridge sub-region: Shackelford County, Stephens County, Throckmorton County
- Eastland sub-region: Callahan County, Eastland County

This labor market assessment is one component of a larger study. In order to understand the full locational resources of the sub-regions, additional studies were conducted, including a traditional infrastructure assessment, a technology infrastructure assessment, a community infrastructure assessment, a curriculum needs assessment, and a target marketing program. These have been submitted under separate cover. In addition, six target industries have been identified for the region and profiled. These also will be submitted under separate cover.

The findings presented herein are of those of WDG only. We have examined the region from the perspective of a locationally active company. For this study, WDG:

- Interviewed approximately 75 representative employers, government officials, staffing services, educators, and community groups throughout the county, and conducted three focus groups consisting of representatives for regional vocational/technical educators; two- and four-year colleges; and economic developers.
- Prepared maps depicting the geographic concentration of selected variables for one 30-minute commute zone selected by the client in each of the sub-regions. These maps are presented in Appendix A. The commute node identified for each sub-region is listed below.
  - Abilene sub-region – 6450 Five Points Parkway, Abilene, TX 79603
  - Haskell sub-region – 301 South 1st Street, Haskell, TX 79521
  - Snyder sub-region – 1201 Lorber Lane, Snyder, TX 79549
  - Sweetwater sub-region – 110 E. Broadway Ave., Sweetwater, TX 79556-4538
  - Brownwood sub-region – 2800 Morris Sheppard Drive, Brownwood, TX 76801
  - Eastland sub-region – 100 West Main, Eastland, TX 76448
  - Breckenridge sub-region – 2410 W Walker Street, Breckenridge, TX 76424
- Prepared and reviewed key statistical data for the counties, the sub-regions, the 30-minute commute zones, Texas, and the United States. Sources of the data include the U.S. Department of the Census, the U.S.

Department of Commerce, the U.S. Bureau of Labor Statistics, the U.S. Department of Education, the Texas Department of Economic Development, and the Texas Workforce Commission. Applied Geographic Solutions (AGS), a leading demographic data vendor from Thousand Oaks, CA, was also used as a data service, because complete data from the 2000 Census were not available at the time the study was prepared. AGS data includes population and demographic estimates for 2001, 2002, and forecasts for 2006. Exhibits containing the gathered data for the sub-regions are presented in Appendix B. Exhibits containing the data for the counties have been submitted electronically.

- Surveyed all employers in the region with 20 or more employees in all business sectors except retail and public administration. Surveys were sent to employers in those sectors with 50 or more employees. Surveys were sent in July 2002. Findings from the employer survey for the region, the Abilene sub-region, and the other six sub-regions (consolidated) are presented in Appendix C.
  - Across the region, 1,045 surveys were sent out, of which 18 were returned as undeliverable. 189 surveys were completed and returned for an 18.4% response rate. This response rate allowed statistically valid conclusions to be drawn from the data. In Taylor County, 456 surveys were mailed and 10 were returned as undeliverable. 116 surveys were returned for a 26% return rate, again allowing for statistically valid data. Among the remaining sub-regions, while the rate of return was high, the actual number of survey responses did not allow valid conclusions to be drawn; therefore, the survey responses were combined. 589 surveys were mailed in the remaining sub-regions and eight were returned as undeliverable. 73 completed surveys were returned, for a 12.4% response rate.
- Surveyed, in June and July 2002, a random sample of the region's residents. To achieve the required response rate and to reach all socio-economic segments of the population, the survey was conducted using face-to-face interviews at popular retail centers across the region. Findings from the residential/household survey are presented in Appendix D for the region, the Abilene sub-region, and the other six sub-regions (consolidated). Detailed findings by sub-region have been provided separately in electronic format.

A study of this type can do no more than describe local conditions. The actual impact of these conditions for any given organizational activity will vary, reflecting the different characteristics and structure of the organization. WDG's principal findings and conclusions are recapped in the Executive Summary, followed by a presentation of findings on key labor market factors.

The Wadley-Donovan Group is a unit of the Grubb & Ellis Company that specializes in location consulting. Clients have included many of the world's leading companies. As an outgrowth of this corporate consulting, WDG is frequently asked by economic development agencies to assist them with their economic development programs. Assistance is typically provided in sales and marketing, strategic planning, database development, overall product development, and assessment. Clients have included, among others, New Orleans; Southeast Mississippi; Eastern Idaho; Hampton Roads; Orange County and Orlando, FL; Tampa; Memphis; Asheville, NC; Raleigh; Richmond, VA; Jackson, TN; Mobile and the states of Delaware, Iowa, Kansas, Kentucky, Wisconsin and Maryland.

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# EXECUTIVE SUMMARY

## West Central Texas

West Central Texas is at a critical juncture in its development. Overall, the region has a number of untapped or under-utilized resources that will be critical to future growth and development. These assets provide an attractive environment for warehouse/distribution facilities, some manufacturing operations (i.e., plastics, metal working, light assembly), entry-level call and administrative centers, regional professional operations, and tourism-based industries. However, given the size of the region, there are very diverse and distinct sub-regions facing a variety of challenges; namely, stagnating or declining population and labor force growth; low unemployment rates; low education levels; and limited availability of certain skill sets, particularly skilled manufacturing, professional, and technical occupations. If not counteracted, these challenges could adversely affect the region's potential for growth.

West Central Texas is a 19-county region with an estimated 2002 population of 326,264. Between 2002 and 2007, the region's population is projected to remain relatively stable, growing by only 1.4% compared to 8.4% in Texas and 5.2% nationally. Also of concern is the projected decline in population within the 18-to-34-year-old sector of the population, which is the foundation for the area's future workforce. Other demographic indicators show an older population with lower income levels relative to state and national averages. However, despite lower education levels, the region does have a higher percentage of residents with a high school diploma and some post-secondary education. This is important, as many employers prefer to hire workers with a high school degree and some post-secondary education.

Overall regional employment is imbalanced when compared to state and national averages. The largest industry sectors based on employment in the region are services, retail trade, agriculture, and mining. Relative to the U.S. however, the region is under-represented in construction, manufacturing, wholesale trade, finance-insurance-and-real-estate, and public administration. Relative to the state, the region is under-represented in these sectors as well as in transportation and public utilities. Between 1990 and 2001, employment in the region grew by 14.5%, slower than the state rate of 34.1% and the national rate of 22.7%. Some of the sub-regions have a large concentration of employment in the agriculture and mining sectors, yet employment in these industries is declining.

The region has a moderately large labor force of 146,342 (as of August 2002). Between 1996 and 2001, the region's labor force declined by 4.6%, compared to an increase of 8.1% in Texas and 5.9% nationally.

Employers report that they are satisfactorily able to recruit a variety of clerical, service, and manufacturing-related occupations. Those skills most readily available include bench assembly workers, entry-level clerical workers, certified teachers, teaching assistants, food service wait staff, housekeeping, retail sales, and seasonal workers. However, there is a shortage of skilled and semi-skilled computer professionals, engineers, manufacturing personnel, skilled and general construction trades, skilled technical health service personnel, and management professionals and trainees. Employers report that they are satisfactorily able to recruit managers and professionals from outside the region; however, employers report that opportunities for "trailing spouses" are somewhat unsatisfactory.

The region has a potentially hidden labor force of approximately 105,085 residents, consisting of residents not currently employed but interested in working, currently employed residents that are interested in training, and recent college graduates. According to resident survey results, there are approximately 42,430 residents within the 19 counties that are currently not employed (either unemployed or not participating in the workforce), but would be interested in employment.

Meanwhile, there are approximately 59,655 currently employed residents that would be interested in training to acquire new job skills. There are more than 3,000 students graduating from regional post-secondary institutions each year, many of which have skills in demand by local employers.

There is a general match between the skills reported in short supply by local employers and the employable skills or training preferences of residents. Among employed residents, the greatest interest for training is in computer

professional and support staff occupations, professional medical services, and business services. Among non-employed residents, the most frequently reported employable skills include education-related skills, non-retail sales, clerical and administrative support, and skilled construction and building trades.

Employers are slightly dissatisfied with the quality of the local workforce. Overall basic skills are seen as satisfactory, but there is room for improvement. Employers report that written communication, reading comprehension, arithmetic, and thinking and judgment skills are borderline unsatisfactory. Computer skills, including fundamental skills, basic keyboarding, and the ability to use word processing software are reported to be slightly above satisfactory. However, spreadsheet skills, database software skills, and advanced computer language skills are seen as unsatisfactory or unavailable.

Employers report that they need strong computer skills among job applicants, higher than what employers are currently seeing. Employers report a good work ethic among their workforces, as well as high productivity, particularly when compared to other company locations. Employers also report a strong willingness to work overtime. Turnover and absenteeism are not seen as problems by local employers. According to local employers, the quality of graduates from local training institutions is good. The training institutions receiving the highest ratings include Abilene Christian University, Hardin-Simmons University, and McMurray University.

Across the region, labor costs are significantly lower than the national and state averages. Overall regional wages are 66% of state averages and 65% of national averages. Benefit packages are modest compared to national standards.

## **Abilene Sub-region**

The Abilene sub-region consists of Taylor County, and it is the only metropolitan statistical area (MSA) in the region. It is the regional center for services, shopping, and employment, and it accounts for approximately 40% of the region's population, with an estimated 2002 population of 127,449. Due to the sub-region's existing infrastructure and workforce resources, development is likely to gravitate to this area.

Like the region, the population is projected to remain relatively stable between 2002 and 2007, growing by approximately 2.1%. Relative to the region, Taylor County residents, on average, are younger, have higher education levels, and higher income levels.

Industry employment in Taylor County differs significantly from the region, state, or nation. *Services* is the largest industry sector, accounting for 40.7% of total industry employment, followed by retail with 19.5% of industry employment. Relative to the region overall, the Abilene sub-region is under-represented in agriculture, mining, construction, and manufacturing, but exceeds regional employment figures in transportation and public utilities, wholesale trade, retail trade, finance-insurance-and-real-estate, services, and public administration. The employment distribution in the county is higher in retail and services than the nation and lower in manufacturing and finance-insurance-and-real-estate. Employment in Taylor County is growing at a rate (16.9%) faster than the regional rate (14.5%) but considerably slower than the state or national rates.

Taylor County has the largest labor pool among the sub-regions, with a civilian labor force of 56,267 (as of August 2002), and it is declining at a rate slightly slower than the region as a whole. Between 1996 and 2001, the civilian labor force declined by 4.5%.

Taylor County employers report being able to successfully recruit a range of skills from the local workforce. Those occupations most readily available include administrative assistants, bilingual/multilingual personnel, entry-level clerical workers, certified teachers, teaching assistants, food service meal prep, food service wait staff, heavy equipment operators, housekeeping/hospitality, retail sales, and seasonal workers. The occupations reported to be in short supply or unavailable from the local labor market include primarily skilled manufacturing and technical occupations such as engineers, experienced maintenance, machine operators with and without setup, maintenance mechanics/electricians, and skilled construction trades. Employers report slightly unsatisfactory results recruiting managers and professionals from outside the region. One factor contributing to the difficulty experienced by employers is a reported lack of opportunities for "trailing spouses".

Taylor County employers have access to a variety of labor sources. According to the residential survey results, 59.3% of residents in Taylor County who are currently not employed are interested in working. This represents 19,104 residents that would be interested in employment if the right opportunity were available. Among those that are employed, 47.2% of Taylor County residents responding to the survey indicated that they would be interested in training to acquire new job skills. This equates to 25,400 residents. The top training preferences among currently employed residents in Taylor County include professional and computer-support-related occupations and professional business services.

Taylor County is also home to many of the region's post-secondary training institutions, including Abilene Christian University, Hardin-Simmons University, McMurray University, Cisco Junior College, and Texas State Technical College. Combined, these institutions have an enrollment of over 11,500 students. Abilene Christian University, Hardin-Simmons University, and McMurray University alone graduate more than 1,300 students per year. According to local employers, some students elect to stay in Abilene after graduation and others would chose to stay if there were opportunities available for recent graduates.

Dyess Air Force Base is another important source of labor for Taylor County employers. There are approximately 5,437 enlisted military at the base, and over 6,000 family members. Spouses of military personnel and exiting military comprise an important component of Taylor County's workforce, according to interviewed employers.

Generally, employers were pleased with the overall quality of the workforce, with some exceptions. Reading comprehension, arithmetic, and thinking and judgment were rated as slightly unsatisfactory by area employers. Basic computer skills among job applicants—including basic keyboarding skills, using word processing software, and accessing and using the Internet—were rated as good by local employers. Spreadsheet skills, accounting software skills, database software skills, and advanced computer language skills were rated as unsatisfactory to unavailable. Work ethic and productivity were seen as above average by local employers.

Despite the fact that Taylor county employers report minimal experience working with local post-secondary institutions for general or customized training, employers are pleased with the quality of graduates from local institutions.

Earnings in the Abilene sub-region are among the highest across the region, but are still well below state and national figures. Overall average annual industry earnings in Taylor County were \$22,536, compared to \$22,121 in the West Central Texas region, \$33,269 in Texas, and \$34,011 nationally.

## **Brownwood Sub-region**

The Brownwood sub-region consists of Brown County, Comanche County, and Coleman County, and is located in the southeast area of the study region. It is the second-largest sub-region after the Abilene sub-region, with an estimated 2002 population of 61,401. The sub-region is projected to grow a modest 2.2% between 2002 and 2007, roughly the same rate as the Abilene sub-region, but well below the state average of 8.4% and the national average of 5.2%. Relative to the region, the Brownwood sub-region has a significantly older population with lower educational and income levels. The sub-region's economy is heavily weighted towards services, retail trade, and manufacturing. The sub-region has several well-known manufacturing establishments that provide a strong base of experienced manufacturing skills. Relative to the West Central Texas region, Brownwood is under-represented in the mining, services, and public administration sector. However, it has a significantly higher concentration of employment in the agricultural sectors.

As the second-largest population center in the West Central Texas region, the Brownwood region has a larger labor force relative to the other sub-regions. In August 2002, the sub-region had a civilian labor force of 27,362. Like the other sub-regions, the labor force has been declining since 1996.

Based on combined sub-region employer survey responses from the Brownwood, Sweetwater, Snyder, Haskell, Breckenridge, and Eastland, employers can successfully recruit some occupations from the local workforce. Those occupations most readily available include bench assembly workers, bilingual/multilingual workers, entry-level clerical workers, housekeeping, material handlers, seasonal workers, and truck drivers. There are a number of occupations that employers report being unavailable from the local labor market; namely, engineers, skilled

health services, health service technicians, machinists, professional managers, and tool and die makers. Employers also report difficulty recruiting professional and managerial talent from outside the area. A key factor contributing to the recruiting difficulties experienced by employers is the limited availability of opportunities for trailing spouses.

According to the residential survey results, there are approximately 8,050 residents that are currently not employed but interested in employment. Among those residents currently employed, there are 12,014 interested in training to acquire new job skills. This provides new employers a potential labor force that would be interested in employment and training opportunities.

Throughout the remaining sub-regions, employers are slightly dissatisfied with the quality of the local labor force. Those skills receiving the lowest ratings include written communication and arithmetic. Employers did give significantly higher ratings to basic computer skills, including fundamental skills, basic keyboarding skills, and using word processing software. Employers reported that these skills were above average. Employers also gave satisfactory ratings to the workers' work ethic and productivity. Employers report a strong willingness to work overtime.

Similar to employers in Taylor County, surveyed employers report minimal experience working with local post-secondary institutions on general and customized training. The most frequently used institution was Texas State Technical College. Despite employer's limited use of local institutions, employers give very good ratings to graduates from the regional institutions. The institutions receiving the highest scores include Abilene Christian University, Hardin-Simmons University, and Tarleton State.

Average annual earnings in the Brownwood sub-region are slightly lower than the region's average annual earnings.

## **Sweetwater Sub-region**

The Sweetwater sub-region consists of Mitchell County, Nolan County, and Runnels County. The sub-region is located in the southwest area of West Central Texas. The sub-region has an estimated 2002 population of 37,073 and is projected to grow by 0.9% between 2002 and 2007, slower than the regional rate (1.4%). Other demographic indicators show that, relative to the region, Sweetwater has a higher proportion of residents without a high school diploma (29.6%), while the proportion of residents with 12 to 15 years of education matches the regional norm. The median age in the Sweetwater sub-region (37.5) is considerably higher than the regional average (35.6), the state average (31.7), or the national average (34.7).

Like the other sub-regions and the region as a whole, the Sweetwater sub-region's largest industry sector is the service sector, followed by retail trade and manufacturing. Relative to the region, however, Sweetwater has a significantly higher concentration of agriculture and mining employment.

The Sweetwater sub-region has a small labor force. In August 2002, it had a civilian labor force of 15,138. Sweetwater's labor force has been declining at a significantly faster rate (7.6%) than several of the other sub-regions, the region, the state, and the nation.

The sub-region has a potentially hidden labor force of approximately 7,761 residents. There are 4,062 residents that are currently not employed but would be interested in employment. In addition, 3,699 currently employed residents are interested in training for career advancement.

## **Snyder Sub-region**

The Snyder sub-region consists of Fisher, Kent, Scurry, and Stonewall Counties. The sub-region is located in the northwest area of the West Central Texas region. The Snyder sub-region is one of the smaller sub-regions, with an estimated 2002 population of 22,573. This sub-region will be facing significant challenges, as it is projected to see a decline in population of approximately 7% between 2002 and 2007. The sub-region has a population that is, on average, older than the region's, has comparable income levels, and has a higher proportion of residents without a high school diploma. Of concern is the projected decline in residents aged 18 to 34. Residents in this age bracket are projected to decline by 11.1% between 2002 and 2007.

Among all of the sub-regions, Snyder's economy has the largest proportion of workers in the mining industry, with approximately 11.5% of employment in this sector – this compares to 3.7% regionally, 1.8% in Texas, and 0.5% nationally. The dominant sector in the sub-region, as in the other sub-regions, is the services sector, followed by retail trade. However, total employment in the Snyder sub-region has declined by 5.6% since 1990, with the mining industry experiencing the largest decline.

The Snyder sub-region has a small labor force of approximately 10,005 residents (as of August 2002). Of particular concern is the rate at which the labor force is declining. Between 1996 and 2001, the civilian labor force declined by 10.3%. As a result, the potential labor force available to new employers is significantly less than in the other sub-regions. According to residential survey results, there are approximately 3,519 residents in the sub-region that are currently not employed but interested in employment. Of those residents that are currently employed, there are approximately 2,563 residents that would be interested in training for career advancement. This provides a total labor reserve of 6,082 for new and expanding employers.

Average annual earnings are higher than the regional average.

## **Haskell Sub-region**

The Haskell sub-region consists of Haskell, Jones, and Knox Counties, and is located in the north central region of the West Central Texas study region. While the sub-region has a small population base, it is the fastest growing sub-region. The estimated 2002 population is 31,622, and it is projected to grow by 4.4% by 2007. It is also the only sub-region that is projected to see an increase in residents aged 18 to 34, the prime working-age years. Almost 30% of the Haskell sub-region's population does not have a high school diploma. However, the proportion of residents with 12 to 15 years of education (a prime target for employers) is lower (51.6%) than the regional average (52.2%).

Among all of the sub-regions, Haskell has seen the greatest increase in employment. Between 1990 and 2001, employment increased by 25.4%, higher than the regional and national rates. The greatest increase (42.9%) occurred in the manufacturing sector, although the largest industry sectors in terms of employment are services, retail trade, and agriculture. Manufacturing comprises a significantly lower proportion of total employment compared to the region as a whole. Haskell has a small labor force comprised of 14,638 (as of August 02) residents. Like the other sub-regions, the civilian labor force has been declining since 1996.

Overall, average annual industry earnings for the sub-region are the lowest among all of the sub-regions. Average annual earnings in 2000 were \$18,616, according to the U.S. Bureau of Labor Statistics.

There are an estimated 3,198 residents not currently employed in the region that would be interested in employment. There are an estimated 5,138 employed residents that would be interested in training to enhance their careers and job opportunities.

## **Breckenridge Sub-region**

The Breckenridge sub-region consists of Shackelford County, Stephens County, and Throckmorton County. This sub-region is the smallest among all sub-regions, with an estimated 2002 population of 14,893. The sub-region is projected to grow at a rate equal to the regional rate of 1.4%. Again, while the proportion of residents without a high school diploma is higher than the regional average, the proportion of residents with 12 to 15 years of training is higher than the national average (53.6% vs. 52.2%).

Like the Snyder sub-region, the Breckenridge sub-region has a high proportion of employment in the mining sector (10.3%) and is the third-largest sector, following services and retail trade. Total industry employment increased by 13.8% since 1990, which is lower than the regional rate (14.5%). The population base offers employers a small civilian labor force of approximately 6,052 residents (as of August 2002). The civilian labor force has experienced a significant decline since 1996, dropping by 10.4% since 1996.

Overall earnings in the Breckenridge sub-region are among the lowest in the region. This may be preventing some residents from participating in the workforce particularly if they need to pay for childcare.

There are an estimated 1,628 residents who are not currently employed that would be interested in working. Of those residents that are currently employed, there are 2,260 residents that would be interested in training for career advancement.

## Eastland Sub-Region

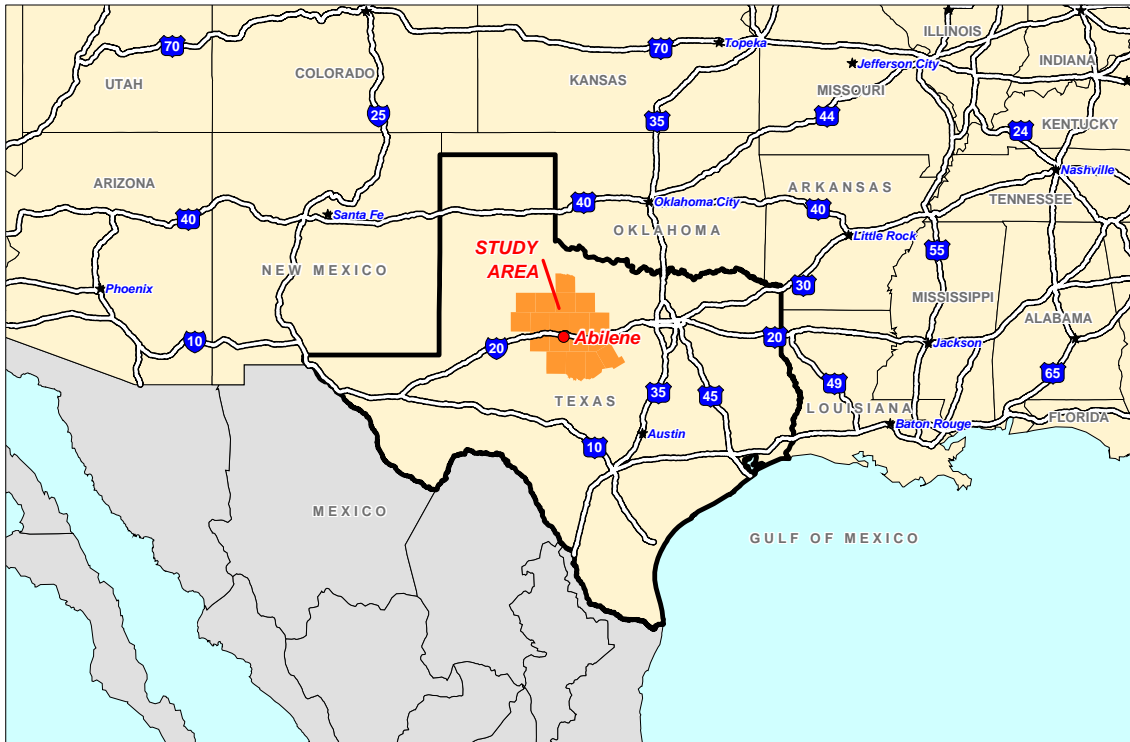
The Eastland sub-region refers to Eastland and Callahan Counties. This sub-region is located in the east-central region of the West Central Texas study area. The Eastland sub-region is growing at a slower rate than the region as a whole and has an estimated 2002 population of 31,253. Eastland has the highest median age among the sub-regions and the lowest median household incomes. Over one-quarter (26%) of residents in the sub-region do not have at least a high school diploma, although there are a higher proportion of residents with 12 to 15 years of education relative to the region (54.8% vs. 52.2%).

The Eastland sub-region is heavily weighted towards services, retail trade, and manufacturing. Eastland saw a 12.6% increase in employment between 1990 and 2001, with the largest increase in the services sector. The Eastland sub-region has a civilian labor force of approximately 16,880 residents (as of August 2002). The labor force has increased since 1996 by 4.2%.

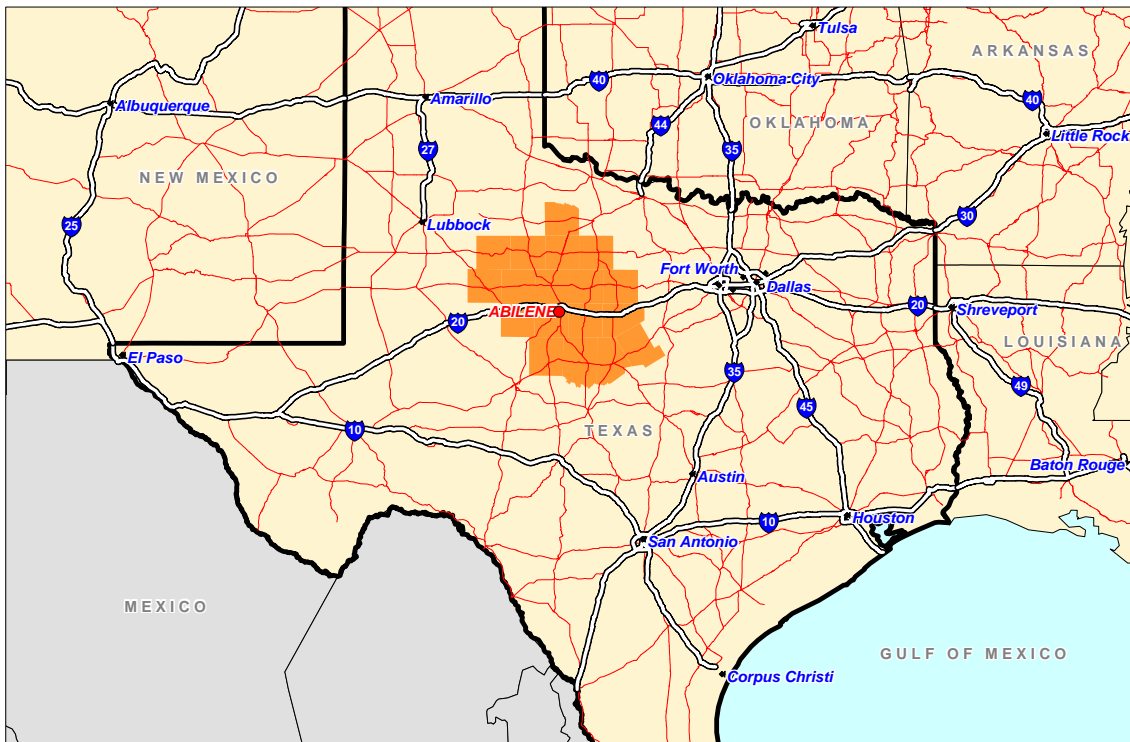
Overall earnings in the sub-region are lower than the regional average.

The pool of employed workers interested in training opportunities for career development and non-employed workers interested in employment amounts to 11,285. There are approximately 2,988 residents not currently employed but interested in employment evenly divided between Eastland and Callahan Counties. In addition, 8,297 employed residents would be interested in improving their skills through workforce development programs.

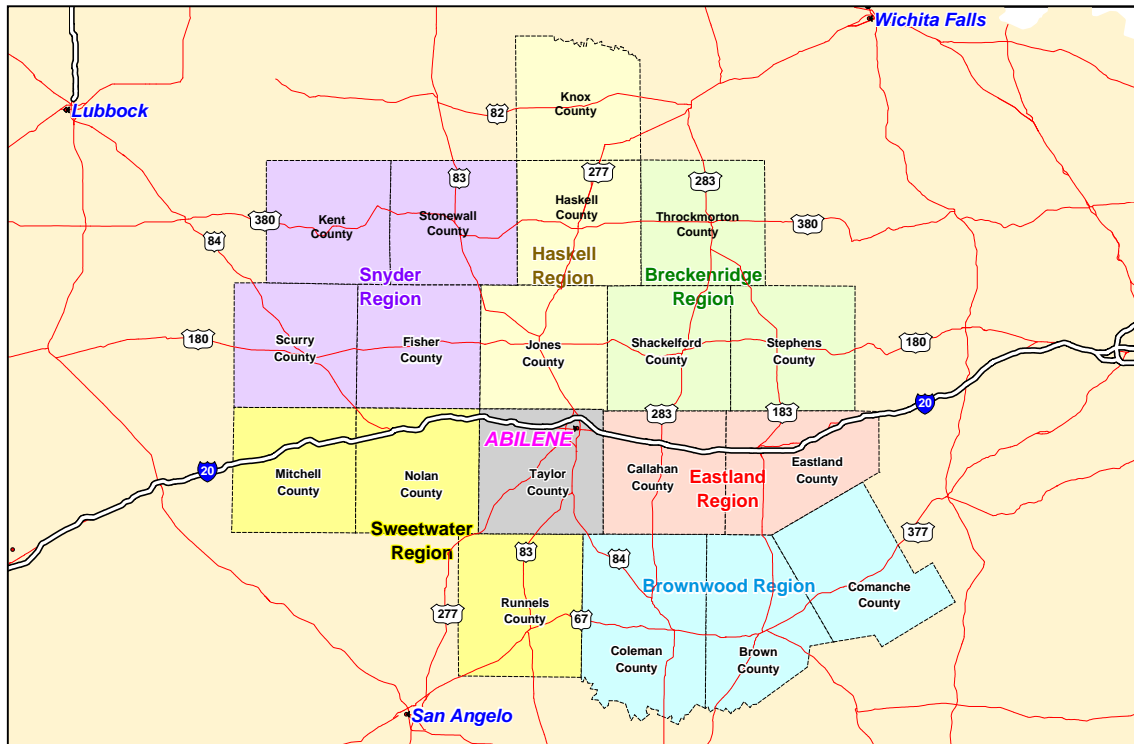
**FIGURE 1**  
**WEST CENTRAL TEXAS IN THE CONTEXT OF THE SOUTH CENTRAL UNITED STATES**



**FIGURE 2**  
**WEST CENTRAL TEXAS IN THE CONTEXT OF THE STATE OF TEXAS**



**FIGURE 3  
SUB-REGIONS IN THE WEST CENTRAL TEXAS STUDY AREA**



# LABOR MARKET ORIENTATION

1. The west central Texas study area is a 19-county region consisting of Taylor, Brown, Comanche, Coleman, Mitchell, Nolan, Runnels, Fisher, Kent, Scurry, Stonewall, Haskell, Jones, Knox, Shackelford, Stephens, Throckmorton, Callahan, and Eastland Counties. The region is displayed in Figures 1, 2, and 3. Distances from Abilene (the largest city in the region) to select local and regional centers are presented in Table 1.
  - For purposes of WDG’s analysis, the 19-county region was divided into seven sub-regions chosen by DCOA. The seven regions and the counties in the sub-regions are listed below:
    - **Abilene sub-region:** Taylor County
    - **Brownwood sub-region:** Brown County, Comanche County, Coleman County
    - **Sweetwater sub-region:** Mitchell County, Nolan County, Runnels County
    - **Snyder sub-region:** Fisher County, Kent County, Scurry County, Stonewall County
    - **Haskell sub-region:** Haskell County, Jones County, Knox County
    - **Breckenridge sub-region:** Shackelford County, Stephens County, Throckmorton County
    - **Eastland sub-region:** Callahan County, Eastland County
  - Primary access to the region is provided by Interstate route 20 running east/west from Shreveport, LA through the Dallas/Ft. Worth metro area and into Abilene. I-20 continues southwest through Abilene to Midland and Odessa, where it connects with I-10. North/south routes include Highway 277 running north through Jones and Haskell Counties, and Highway 84 running south through Taylor and Coleman Counties.
  - Air service to the study area is available through the Abilene Regional Airport. American Eagle services the airport and provides direct non-stop service to Dallas/Ft. Worth seven times a day.

**TABLE 1**  
**DISTANCE FROM ABILENE TO SELECT REGIONAL AND NATIONAL CENTERS**  
 Source: Microsoft Automap

Destination City	From Abilene, TX		Destination City	From Abilene, TX	
	Highway Miles	Driving Time		Highway Miles	Driving Time
<b>Albany, TX</b>	50	58 mins.	El Paso, TX	455	7 hrs, 5 mins.
Albuquerque, NM	488	9 hrs, 10 mins.	Galveston, TX	469	7 hrs, 32 mins.
Amarillo, TX	288	5 hrs, 2 mins.	<b>Haskell, TX</b>	54	1 hr, 6 mins.
<b>Anson, TX</b>	24	32 mins.	Houston, TX	421	6 hrs, 46 mins.
<b>Aspermont, TX</b>	60	1 hr, 14 mins.	Jackson, MS	589	9 hrs, 21 mins.
Austin, TX	270	5 hrs, 2 mins.	<b>Jayton, TX</b>	83	1 hrs, 42 mins.
<b>Baird, TX</b>	25	28 mins.	Las Vegas, NV	1,061	18 hrs, 27 mins.
<b>Ballinger, TX</b>	60	1 hr, 15 mins.	Little Rock, AR	504	8 hrs, 3 mins.
<b>Benjamin, TX</b>	95	2 hrs, 3 mins.	New Orleans, LA	707	11 hrs, 13 mins.
<b>Breckenridge, TX</b>	78	1 hr, 24 mins.	Phoenix, AZ	886	13 hrs, 51 mins.
<b>Brownwood, TX</b>	97	1 hr, 49 mins.	<b>Roby, TX</b>	52	1 hrs, 4 mins.
<b>Coleman, TX</b>	57	1 hr, 13 mins.	Salt Lake City, UT	1,107	20 hrs, 42 mins.
<b>Colorado City, TX</b>	73	1 hr, 13 mins.	Shreveport, LA	370	5 hrs, 56 mins.
Colorado Springs, CO	654	11 hrs, 49 mins.	<b>Snyder, TX</b>	82	1 hr, 29 mins.
<b>Comanche, TX</b>	96	2 hrs, 1 min.	<b>Sweetwater, TX</b>	43	46 mins.
Corpus Christi, TX	409	7 hrs, 13 mins.	<b>Throckmorton, TX</b>	84	1 hr, 41 mins.
Dallas/Fort Worth, TX	185	3 hrs, 6 mins.	Tulsa, OK	396	6 hrs, 59 mins.
<b>Eastland, TX</b>	60	1 hr, 2 mins.	Wichita, KS	447	7 hrs, 44 mins.

Bold text indicates cities within the study area.

2. **According to the 2000 Census, the study area has a total population of 324,901.** As can be seen in Table 2, the Abilene region has the largest population base, with 126,555 residents. The Taylor County seat is the City of Abilene, which serves a regional center for shopping, services, and employment. In descending order, the population of the remaining seven sub-regions is as follows: Brownwood sub-region (60,935); Sweetwater sub-region (36,995); Eastland sub-region (31,202); Haskell sub-region (31,131); Snyder sub-region (23,257); and Breckenridge sub-region (14,826). See Exhibits B-1 and B-2 for full demographic data. See Table 2 for comparative statistics for each of the sub-regions, the region, the State and the U.S.
  - Between 1990 and 2000, the 19-county region’s population grew by 4.1%, significantly slower than the state rate of 22.8% and the national rate of 13.2%. None of the sub-regions saw growth rates close to the state rate. The Snyder sub-region saw a population decline of 12.2% during this period.
  - Between 2002 and 2007, the region’s population is projected to remain relatively stable, growing only by 1.4% versus the state rate of 8.4% and the national rate of 5.2%. The fastest growth rate is projected to be in Haskell (4.4%).
  - The region’s working-age population is projected to decline. The population aged 18 to 34 is projected to decrease by 3.2% between 2002 and 2007 versus an increase of 2.7% in Texas and a decline of 2.5% nationally. The largest decline in this age bracket is seen in the Snyder sub-region, where the population aged 18 to 34 will decline by 11.1% during this period. Haskell is the only sub-region projected to see an increase (0.8%) in the 18 to 34 years age group.
  - The Abilene sub-region consists of Taylor County, and it is the only metropolitan statistical area (MSA) in the region. It is the regional center for business, medical, and other services, retail, and employment, and it accounts for approximately 40% of the region’s population.

**TABLE 2**  
**POPULATION FOR THE SUB-REGIONS, REGION, TEXAS, AND THE U.S.**  
 Source: Applied Geographic Solutions, Inc. (2002 and 2007), U.S. Bureau of the Census (1990 and 2000)

Population	Abilene	Brown-wood	Sweet-water	Snyder	Haskell	Brecken-ridge	East-land	West Ctrl Texas Region	Texas	U.S.
1990	119,660	57,460	35,905	26,499	28,147	14,207	30,350	312,228	16,986,524	248,710,012
2000 Census	126,555	60,935	36,995	23,257	31,131	14,826	31,202	324,901	20,851,820	281,421,906
2002	127,449	61,401	37,073	22,573	31,622	14,893	31,253	326,264	21,542,329	286,999,830
2007	130,114	62,781	37,413	21,022	33,001	15,108	31,492	330,931	23,350,132	302,000,077
Change '90-'02	6.5%	6.9%	3.3%	-14.8%	12.3%	4.8%	3.0%	4.5%	26.8%	15.4%
Change '90-'07	8.7%	9.3%	4.2%	-20.7%	17.2%	6.3%	3.8%	6.0%	37.5%	21.4%
Change '02-'07	2.1%	2.2%	0.9%	-6.9%	4.4%	1.4%	0.8%	1.4%	8.4%	5.2%

3. **Other demographic indicators show an older population with income and education levels below the national average.** In 2002, the estimated median age in the study region was 35.6, versus 31.7 in Texas and 34.7 nationally. The region has low household incomes. In 2002, the region’s median household income (\$31,018) was lower than the state (\$41,397) and nation (\$45,005). Similarly, there is a high proportion of households in the region with incomes below \$35,000. According to the 2000 Census, 54.9% of study area households have incomes below \$35,000 compared to 44.1% in Texas and 41.4% nationally. WDG household survey results also indicate low-income levels. 40.6% of residents who responded to the survey and are employed report earning less than \$25,000 annually, while 62.2% earn less than \$35,000 annually. Certain educational indicators are also low. According to the 2000 Census, 23.2% of residents over the age of 25 do not have a high school diploma, versus 19.6% nationally. The proportion of residents in the region without a high school diploma was slightly lower than the state figure of 24.4%. However, the proportion of residents in the region with 12 to 15 years of education (58.9%) was higher than the state

(52.4%) or national (55.9%) figures. This is important, as employers prefer to hire residents with a high school diploma and some post-secondary training. See Exhibits B-1 and B-2 in the Appendix for detailed demographic profiles of the region, the sub-region, the state, and the nation. A summary analysis of the sub-regions on key data follows.

- **Abilene** – Relative to the region, Abilene sub-region residents, on average, are younger, have higher education levels, and have higher incomes. In 2002, the median age in Taylor County was 31.6, comparable to the state median (31.7) but lower than the region (35.6%). Household incomes are also higher compared to the region. In 2002, the median household income was \$33,861. According to the census, approximately 51.4% of sub-regional households had incomes below \$35,000, which was the lowest proportion among all of the sub-regions. Education levels in the county are high. 18.8% of residents do not have a high school diploma, which is lower than the region (23.2%), Texas (24.4%) or the U.S. (19.6%). According to household survey results, 65.4% of residents responding to the survey earn less than \$35,000 annually.
- **Brownwood** – The Brownwood sub-region has a significantly older population with lower educational and income levels relative to the overall region. The median age in the region was 38.1 in 2002. Median household incomes in 2002 were \$28,545, the second-lowest among all of the sub-regions. According to the 2000 Census, the proportion of residents earning less than \$35,000 annually is 53.6%, lower than the other sub-regions (except for Abilene) and the region (54.9%). Based on household survey results, 64.7% of responding residents earn less than \$35,000 annually.
- **Sweetwater** – Relative to the region, the Sweetwater sub-region has a higher proportion of residents without a high school diploma (29.9%) and a lower proportion of residents with 12 to 15 years of education (57.6%). These are some of the lowest education levels among all of the sub-regions. Income levels are lower than regional figures. In 2002, the median household income was \$29,506. According to the 2000 Census, 63.2% of households have incomes below \$35,000, which was the highest proportion among all of the sub-regions. The median age in the Sweetwater sub-region was 37.5, compared to 35.6 in the region.
- **Snyder** – The Snyder sub-region has a population, that is older, on average, than the region's, has comparable income levels, and a higher proportion of residents without a high school diploma. In 2002, the median age was 38.2, compared to the region (35.6), the state (31.7), and the nation (34.7). The median household income in 2002 was \$31,874, comparable to the regional median income of \$31,018. Approximately 55.6% of households have incomes below \$35,000. The proportion of residents without a high school diploma is high (27.4%), although the proportion of residents with 12 to 15 years of education (60.5%) is among the highest out of all the sub-regions.
- **Haskell** – Relative to the region, the Haskell sub-region has an older population and low income levels. The median age in Haskell is 37.5. In 2002, the median household income is \$29,612. According to the 2000 Census, approximately 61.3% of households have incomes below \$35,000. Educational levels in the Haskell sub-region are significantly lower than the other sub-regions. More than one-third of residents (33.9%) over the age of 25 do not have a high school diploma. Relative to the region, a lower proportion of residents (56.1%) in the Haskell sub-region have between 12 and 15 years of education.
- **Breckenridge** – Like many of the other sub-regions, the Breckenridge sub-region has an older population with low income and education levels relative to the region. The median age in Breckenridge is 38.7, versus the regional rate of 35.6, the state rate of 31.7, and the national rate of 34.7. The median household income in the sub-region (\$29,612) is lower than the region, state, or U.S., and a higher proportion of households have incomes below \$35,000. According to the 2000 Census, 57.2% of households have incomes below \$35,000. Again, similar to some of the other sub-regions, the proportion of residents without a high school diploma (25.5%) is high relative to the region, state, and U.S., and the proportion of residents with 12 to 15 years of education is comparable to the regional average and higher than the state or U.S.

- **Eastland** – The Eastland sub-region has the highest median age among all of the sub-regions (39.9) and the lowest median household income (\$27,244). According to the 2000 Census, 59.6% of households have incomes below \$35,000, compared to 54.9% in the region, 44.1% in Texas, and 41.4% nationally. The sub-region has the highest proportion of residents with 12 to 15 years of education (62.8%) among all of the sub-regions. Approximately 24.6% of residents over the age of 25 do not have a high school diploma.
4. **Overall, the region is largely rural with a significant base of service sector employment.** The region is imbalanced when compared to state and national industry distribution. The employment distribution by sub-region is shown in Table 3. In terms of total employment, the region's largest sectors are services (36.3%), retail trade (17.3%), agriculture (5.8%), and mining (3.7%). Within the service sector, *health care and social assistance* is the largest subsector in terms of total employment, followed by *accommodation and food services*. Within the manufacturing sectors, the largest subsectors are *fabricated metal products* and *food manufacturing*. Relative to the U.S., the region has a high proportion of employment in the agriculture, mining, transportation and public utilities, retail trade, and service sectors. Relative to the state, the region is under-represented in these sectors as well as in transportation and public utilities.
- Exhibit B-3 in the Appendix shows employment growth between 1990 and 2001 for the sub-regions, the region, Texas and the United States. Overall regional employment grew by 14.5%, slower than the state rate of 34.1% and the national rate of 22.7%. The industry sectors experiencing the highest growth in the region during this period were services (growing by 21.1% between 1990 and 2001) and finance-insurance-and-real-estate (growing by 19.5% between 1990 and 2001).
- Two sectors experienced a decline in employment between 1990 and 2001. Employment in the agricultural, forestry and fishing sector declined by 1.1%, and employment in the mining sector declined by 6.6%.
- **Abilene** – Over 40% of Abilene's industry employment is in the service sector, with retail trade as the next-largest sector, with 19.5% of industry employment. The Abilene sub-region has a small proportion of manufacturing employment (9.7%) relative to the region, three of the other sub-regions (Brownwood, Sweetwater, and Eastland), the state, and the nation. Between 1990 and 2001, employment in the Abilene sub-region increased by 16.9%, which is the second-largest increase among all of the sub-regions. The greatest increase occurred in the service sector. Service sector employment increased by 21.3% between 1990 and 2001.
  - **Brownwood** – The largest industry sectors in the Brownwood sub-region are services (33.6%), retail trade (17.8%), and manufacturing (14.8%). Between 1990 and 2001, total industry employment increased by 15.3%. The greatest growth occurred in the service sector, which increased by 22.7% between 1990 and 2001. Employment declined in the agriculture sector by 1.1%.
  - **Sweetwater** – Like the other sub-regions, the service sector is the largest employment sector in the Sweetwater sub-region, with 32.8% of total industry employment, followed by retail trade (15.8%) and manufacturing (13.6%). Among all of the sub-regions, the Sweetwater region has the second-highest proportion of employment in the manufacturing sector. Overall industry employment in Sweetwater increased by 12.5% between 1990 and 2001, with the greatest increase (20.6%) occurring in the service sector.
  - **Snyder** – The Snyder sub-region's economy is weighted towards the service (32.8%), retail trade (14.8%), and mining (11.5%) sectors. There is also a high proportion of employment in the agriculture sector (9.0%) relative to all of the other sub-regions except the Haskell sub-region. Between 1990 and 2001, industry employment declined by 5.6%. The largest decline occurred in the mining sector, which had a 22.6% decrease in employment, followed by the agriculture sector, which had a 17.8% decline in employment. The sector experiencing the strongest growth between 1990 and 2001 was the finance-insurance-and-real-estate sector, which increased by 5.3%.

- **Haskell** – The Haskell sub-region experienced the strongest employment growth among all of the sub-regions between 1990 and 2001. During this period, employment increased by 25.4%, which is higher than the regional rate (14.5%) and the national rate (22.7%). The greatest increase in employment occurred in the manufacturing sector (42.9%), although the sub-region's largest sectors are services (34.1%), retail trade (16.4%), and agriculture (12.3%).
- **Breckenridge** – Similar to the Snyder region, the Breckenridge sub-region has a high proportion of residents employed in the mining sector (10.3%), although the largest sectors are services (30.1%) and retail trade (18.1%). Employment in this sub-region grew by 13.8% between 1990 and 2001 despite the fact that there were significant employment declines in the agriculture (4.1%) and mining (8.3%) sectors. The service sector experienced the strongest growth, with industry employment increasing by 24.2%.
- **Eastland** – The Eastland sub-region is heavily weighted towards the service, retail trade, and manufacturing sectors. The sub-region saw a 12.6% increase in employment between 1990 and 2001, with the strongest growth in the services sector, which increased by 19.8%. Employment declines were seen in the agriculture (0.5%) and mining sectors (6.8%).

**TABLE 3**  
**EMPLOYMENT BY INDUSTRY (2001)**  
Source: Applied Geographic Solutions, Inc.

Industry	Abilene	Brown-wood	Sweet-water	Snyder	Haskell	Brecken-ridge	East-land	West TX Region	TX	U.S.
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Ag, Forestry, and Fishing	2.1%	7.6%	8.4%	9.0%	12.3%	8.0%	5.6%	5.8%	2.5%	2.4%
Mining	2.2%	1.3%	4.1%	11.5%	5.1%	10.3%	4.4%	3.7%	1.8%	0.5%
Construction	4.4%	6.0%	6.5%	6.6%	6.7%	7.3%	7.1%	5.6%	6.7%	6.2%
Manufacturing	9.7%	14.8%	13.6%	6.6%	6.2%	7.5%	11.0%	10.5%	13.6%	16.5%
Transp. and Public Utilities	7.2%	7.0%	7.3%	5.5%	6.8%	5.9%	8.0%	7.0%	7.3%	6.8%
Wholesale Trade	4.2%	4.0%	3.4%	3.4%	3.6%	3.5%	4.5%	3.9%	4.9%	4.4%
Retail Trade	19.5%	17.8%	15.8%	14.8%	16.4%	18.1%	17.8%	17.9%	17.3%	16.8%
Finance, Insurance, and Real Estate	5.2%	4.3%	3.9%	3.2%	4.2%	5.6%	5.0%	4.7%	6.9%	6.9%
Services	40.7%	33.6%	32.8%	33.7%	34.1%	30.1%	33.0%	36.3%	34.5%	34.7%
Public Administration	4.8%	3.6%	4.0%	5.7%	4.7%	3.8%	3.8%	4.4%	4.4%	4.7%

5. **Based on the industry makeup of the region, there is a strong concentration of residents employed in services, farming, precision production, and transportation occupations.** Compared to the U.S., the region is under-represented in key white-collar occupations (executive, professional, technical, sales, and clerical) as well as machine operator and laborer/handler occupations. Table 4 shows the occupational breakdown of the residents of the sub-regions, the region, Texas, and the U.S.

**TABLE 4**  
**EMPLOYMENT BY OCCUPATION (2001)**  
 Source: Applied Geographic Solutions, Inc.

Occupation	Abilene	Brown-wood	Sweet-water	Snyder	Haskell	Brecken-ridge	Eastland	West TX Region	TX	US
Executive	9.3%	6.7%	6.4%	6.1%	5.7%	6.6%	6.6%	7.6%	10.5%	10.6%
Professional	15.7%	10.6%	10.2%	11.1%	12.0%	10.3%	11.4%	12.9%	14.1%	14.4%
Technician	3.8%	2.4%	1.9%	2.8%	2.3%	1.1%	2.2%	2.8%	3.8%	3.6%
Sales	12.1%	10.3%	8.6%	7.7%	7.8%	9.5%	10.6%	10.4%	11.5%	10.9%
Clerical	16.5%	13.7%	13.8%	14.0%	13.6%	15.9%	15.4%	15.1%	17.1%	17.2%
Services	19.5%	19.9%	19.7%	19.3%	19.9%	17.1%	17.7%	19.4%	16.4%	16.1%
Farming	2.7%	9.2%	10.2%	11.0%	14.5%	10.4%	7.2%	7.2%	3.2%	3.1%
Precision production	10.3%	10.7%	12.2%	14.2%	12.7%	14.5%	13.5%	11.6%	11.3%	11.0%
Machine operators	3.5%	7.5%	6.7%	3.5%	3.2%	3.9%	4.7%	4.7%	4.5%	5.7%
Transportation	4.0%	5.2%	5.6%	6.7%	5.5%	7.4%	6.4%	5.1%	3.8%	3.7%
Laborers/handlers	2.8%	3.8%	4.6%	3.8%	2.8%	3.3%	4.3%	3.4%	3.6%	3.6%

6. **Exhibit E-2 shows the commuting patterns of regional residents.** Most regional residents work within the region, except for those in Stonewall County. For individuals commuting outside their counties for employment, the most common worksite is Taylor County.

# LABOR AVAILABILITY

## West Central Texas Region

- As seen in Table 5, the region has a moderately sized, but declining, labor force. In August 2002, the region had an average civilian labor force of 146,342. See Exhibit B-4 for complete labor force data for the sub-regions, the region, Texas, and the United States. Between 1996 and 2001, the labor force declined by 4.6%, compared to an increase of 8.1% in Texas and 5.9% nationally. Some of this decline may be attributed to the decline seen in the working-age population (population aged 18 to 34). This population segment may be leaving the region for expanded employment and lifestyle opportunities.
  - The region has a low unemployment rate. The region's average annual unemployment rate in 2001 was 3.7%, considerably lower than the state rate of 4.9% and the national rate of 4.8%.
  - The region has a low labor participation rate. Residents participating in the workforce include employed residents as well as residents currently unemployed but looking for employment. As seen in Table 5, 61.9% of working-age residents are actively participating in the workforce, compared to 68.4% in Texas and 67.8% nationally. This indicates that there are residents that could potentially enter the workforce if the right opportunity became available.

**TABLE 5**  
**REGION, STATE, AND U.S. LABOR FORCE CHARACTERISTICS**  
 Source: U.S. Bureau of Labor Statistics

Civilian Labor Force	West Ctrl Texas Region	Texas	All of US
1996	151,439	9,674,460	133,951,250
2001	144,404	10,462,712	141,822,250
August 2002	146,342	10,747,446	142,616,000
% Change '96 - '01	-4.6%	8.1%	5.9%
Unemployment Rate			
1996	4.9%	5.6%	5.4%
2001	3.7%	4.9%	4.8%
August 2002	4.3%	6.3%	5.7%
Labor Participation			
2002	61.9%	68.4%	67.8%

- Employers report satisfactory to good availability for a range of skills. Of the 48 occupations listed in WDG's survey for which there were sufficient data, employers reported satisfactory-to-good availability of 22 positions. Table 6 lists those occupations for which employers report satisfactory-to-good availability. These occupations are found in a range of different industry groups, including office/white-collar, production, service, and distribution.

**TABLE 6**  
**OCCUPATIONS AVAILABLE FROM THE REGIONAL WORKFORCE**  
**AS REPORTED BY EMPLOYERS**  
 (5=plentiful; 1=unavailable)  
 Source: WDG Employer Survey

Occupation	Average Score	Median Score	Responses
Clerical workers: entry-level	4.1	4.0	35
Bench assembly workers	4.0	4.0	7
Seasonal workers	3.8	4.0	6
Bilingual/multilingual personnel	3.8	4.0	13
Sales: retail	3.6	4.0	5
Food service: wait staff	3.6	4.0	7

**TABLE 6, continued**  
**OCCUPATIONS AVAILABLE FROM THE REGIONAL WORKFORCE**  
**AS REPORTED BY EMPLOYERS**  
**(5=plentiful; 1=unavailable)**  
 Source: WDG Employer Survey

Occupation	Average Score	Median Score	Responses
Education: teaching assts, other non-certified	3.6	4.0	9
Education: certified teachers/admin	3.5	4.0	10
Hospitality: housekeeping, other	3.5	3.5	10
Unskilled laborers: mfg	3.4	3.5	8
Truck drivers	3.5	3.0	13
Accounting clerks	3.4	3.0	49
Administrative assistants	3.4	3.0	37
Material handlers	3.3	3.0	9
Unskilled laborers: except mfg	3.3	3.0	12
Computer operators	3.2	3.0	13
Clerical workers: advanced computer skills	3.2	3.0	28
Food service: meal prep	3.2	3.0	19
Technicians: mfg, process, etc - entry-level	3.1	3.0	10
Call center CSR/technicians Inbound: entry-level	3.0	3.0	12
Call center CSR/technicians Inbound: experienced	3.0	3.0	10
Heavy equipment operators	3.0	3.0	7

- Some occupations are only marginally available, according to local employers. Table 7 lists those positions that employers have slight difficulty filling with applicants from the West Central Texas region.

**TABLE 7**  
**OCCUPATIONS MARGINALLY AVAILABLE FROM THE REGIONAL**  
**WORKFORCE AS REPORTED BY EMPLOYERS**  
**(5=plentiful; 1=unavailable)**  
 Source: WDG Employer Survey

Occupation	Average Score	Median Score	Responses
Applicants willing to work 2nd shift	2.9	3.0	25
Technicians: mfg, process, etc - experienced	2.9	3.0	12
Computer programmers	2.9	3.0	9
Construction trades: general	2.8	3.0	13
Management: experienced	2.8	3.0	19
Sales: non-retail	2.7	3.0	10
Computer network administration	2.6	3.0	17
Maintenance: experienced	2.6	3.0	17
Database administrators	2.6	3.0	5

- There are 17 occupations that employers report difficulty finding or that are unavailable in the regional labor market. These occupations are listed in Table 8 and are primarily skilled or technical occupations. Several occupations, such as engineers, are reported to be in short supply across the country.

**TABLE 8**  
**OCCUPATIONS WITH LIMITED AVAILABILITY OR UNAVAILABLE FROM**  
**THE REGIONAL WORKFORCE AS REPORTED BY EMPLOYERS**  
**(5=plentiful; 1=unavailable)**  
 Source: WDG Employer Survey

Occupation	Average Score	Median Score	Responses
Computer/office technical support specialist	2.8	2.5	12
Management trainees	2.1	2.5	8
Professionals/management	2.5	2.0	19
Maintenance mechanics/electricians	2.4	2.0	16
Health services: professional	2.4	2.0	14
Machine operators: no set-up	2.4	2.0	7
New or emerging jobs	2.4	2.0	5
Machine operators: with set-up	2.4	2.0	8
Applicants willing to work 3rd shift	2.4	2.0	11
Health services: technicians	2.3	2.0	7
Construction trades: skilled	2.3	2.0	11
Engineers: general, entry-level	2.0	2.0	11
Engineers: electrical/electronic	2.0	2.0	8
Engineers: mechanical	1.9	2.0	8
Engineers: chemical	1.6	2.0	5
Health services: skilled	2.1	1.5	10
Engineers: other	1.2	1.0	6

3. **Regional employers report slightly unsatisfactory experiences trying to recruit professional and managerial talent from outside the region.** Employers provided a median score of 3.0 and an average score of 2.8 on their ability to recruit professional and managerial talent from outside the region, where 1=poor and 5=excellent.
- One factor that contributes to the difficulty recruiting professionals from outside the region is the limited employment opportunities available for “trailing spouses”. Employment opportunities for trailing spouses are somewhat unsatisfactory, according to employer survey results (a median score of 3.0 and an average score of 2.6).
4. **There are a significant number of residents not currently working but interested in employment.** WDG estimates from its survey data that there are approximately 42,400 working-age residents (18-74 years of age) who are not working (either unemployed or not participating in the workforce), but are interested in employment. Table 9 shows the work preferences of the region’s not-employed residents.
- Roughly 31.5% of the region’s non-employed residents who are interested in working (13,400) would prefer full-time employment. The balance, roughly 68.5% or 29,065 residents, would prefer part-time employment.
  - The leading reasons for these individuals not to be employed is because of a shortage of suitable jobs (31.0%), raising a family (19.5%), and attending school (16.1%). See Table 10.
  - As seen in Table 11, the skills base of residents not currently in the workforce but interested in employment is diverse. *Education-related skills* is the largest occupational skill group (15.1%) reported by non-working residents, followed by *clerical/administrative support* (13.7%) and *construction and building trades* (8.2%).
  - Approximately 39.4% of not-employed residents would be interested in working from home via a computer.

**TABLE 9  
WORK PREFERENCES OF NON-EMPLOYED RESIDENTS  
INTERESTED IN EMPLOYMENT**

Source: YA/WDG Residential Survey, Summer 2002

Interest	Region	
	Number	%
Interested in employment	42,400	54.4%
Not Interested in employment or did not respond	35,600	45.6%
Total	78,000	100%
Interest in employment		
Part-time	29,000	68.5%
Full-time	13,400	31.5%
Total	42,400	100.0%

**TABLE 10  
REASONS FOR NON-EMPLOYMENT FOR RESIDENTS NOT IN THE  
WORKFORCE BUT INTERESTED IN EMPLOYMENT**

Source: YA/WDG Residential Survey, Summer 2002

Reason	Region	
	Number	%
Can't find a suitable job	13,200	31.0%
Raising a family	8,300	19.5%
Attending school	6,800	16.1%
Other	5,900	13.8%
Retired	2,900	6.9%
Disabled	2,900	6.9%
Not looking for employment	2,400	5.7%
Total	42,400	100%

**TABLE 11  
LEADING OCCUPATIONAL SKILLS OF RESIDENTS NOT IN THE  
WORKFORCE BUT INTERESTED IN EMPLOYMENT**

Source: YA/WDG Residential Survey, Summer 2002

Employable Skills	Region	
	Number	%
Education-related	6,400	15.1%
Clerical/administrative support	5,800	13.7%
Construction and building trades	3,500	8.2%
Management/administration	2,300	5.5%
Non-retail sales	2,300	5.5%
Medical services - support staff	2,300	5.5%
Business services	2,300	5.5%
Total	24,900	59.0%

5. **There are some limitations to working that might impact the types of jobs held by residents not currently in the workforce; however, 65.6% report no limitations to working.** As seen in Table 12, the biggest limitation reported is a lack of jobs in fields of education/training, which was cited by 11.3% of respondents. This was followed by dependent care obligations (9.4%) and physical disability (8.8%).

**TABLE 12**  
**LIMITATIONS TO WORKING AMONG RESIDENTS NOT IN THE**  
**WORKFORCE BUT INTERESTED IN EMPLOYMENT**

Source: YA/WDG Residential Survey, Summer 2002

Limitation	Region	
	Number	%
No limitations	24,100	56.8%
Lack of jobs in field of training/education	7,700	18.2%
Dependent care	4,300	10.2%
Physical disability	3,900	9.1%
Lack of public transportation	1,500	3.5%
Other	900	2.3%
Total	42,400	100%

6. **Approximately 80.5% of the region's non-employed residents would be interested in receiving job training as a condition of employment.** This equates to 31,132 residents interested in training for career advancement.
7. **A significant number of currently employed residents would be interested in training to acquire new job skills for career advancement.** YA/WDG resident survey returns show that 42.6% of currently employed residents would be interested in additional training, which equates to approximately 59,700 residents. These individuals would offer a potential workforce for new and expanding companies offering career advancement and training opportunities.
- Table 13 shows the training preferences of both employed and non-employed residents and the estimated number of residents interested in each occupational area. The number of employed and non-employed residents interested in employment that are also interested in training approximates almost 98,000 residents. Fields of greatest interest include computer-related support staff, professional medical services, computer-related professionals, and business services.

**TABLE 13**  
**TRAINING PREFERENCES OF EMPLOYED AND NON-EMPLOYED RESIDENTS**  
**INTERESTED IN WORKING**

Source: YA/WDG Residential Survey, Summer 2002

Retraining Preference	Not Employed		Employed		Total Number
	Number	%	Number	%	
<b>Executive</b>	0	0.0%	497	0.8%	497
<b>Management/administration</b>	0	0.0%	2,237	3.8%	2,237
<b>Computer-related</b>					
Professional	5,189	16.7%	6,463	10.8%	11,651
Support staff	4,036	13.0%	9,694	16.3%	13,730
<b>Education-related</b>	2,306	7.4%	3,977	6.7%	6,283
<b>Engineering</b>					
Professional	577	1.9%	1,491	2.5%	2,068
Support staff	0	0.0%	249	0.4%	249
<b>Scientific</b>					
Professional	0	0.0%	497	0.8%	497
Support staff	0	0.0%	0	0.0%	0
<b>Financial services, insurance</b>	0	0.0%	2,734	4.6%	2,734
<b>Sales</b>					
Non-retail	577	1.9%	497	0.8%	1,074
Retail only	0	0.0%	497	0.8%	497

**TABLE 13, continued**  
**TRAINING PREFERENCES OF EMPLOYED AND NON-EMPLOYED RESIDENTS**  
**INTERESTED IN WORKING**

Source: YAWDG Residential Survey, Summer 2002

Retraining Preference	Not Employed		Employed		Total Number
	Number	%	Number	%	
<b>Medical services</b>					
Professional	3,459	11.1%	8,700	14.6%	12,159
Technician	1,730	5.6%	1,491	2.5%	3,221
Support staff	0	0.0%	0	0.0%	0
<b>Other professional</b>	577	1.9%	994	1.7%	1,571
<b>Social services</b>	577	1.9%	994	1.7%	1,571
<b>Business services</b>	2,883	9.3%	4,474	7.5%	7,357
<b>Personal services</b>	577	1.9%	1,491	2.5%	2,068
<b>Clerical/administrative support</b>	4,036	13.0%	1,243	2.1%	5,278
<b>Customer service &amp; tech support</b>	0	0.0%	249	0.4%	249
<b>Entertainment/tourism</b>	0	0.0%	994	1.7%	994
<b>Hospitality - hotel - restaurant</b>					
Kitchen	0	0.0%	249	0.4%	249
Services	0	0.0%	0	0.0%	0
Guest services	577	1.9%	249	0.4%	825
<b>Agriculture/fishing</b>	0	0.0%	249	0.4%	249
<b>Mining</b>	0	0.0%	0	0.0%	0
<b>Construction &amp; building trades</b>					
Management	0	0.0%	746	1.3%	746
Trades	1,153	3.7%	1,740	2.9%	2,893
Laborer	0	0.0%	0	0.0%	0
<b>Other trades</b>	577	1.9%	1,989	3.3%	2,565
<b>Manufacturing/production</b>					
High-skilled	577	1.9%	994	1.7%	1,571
Skilled	0	0.0%	497	0.8%	497
Production	577	1.9%	249	0.4%	825
<b>Warehousing</b>	0	0.0%	0	0.0%	0
<b>Transportation</b>	0	0.0%	497	0.8%	497
<b>Utilities</b>	0	0.0%	249	0.4%	249
<b>Government</b>	1,153	3.7%	2,237	3.8%	3,390
<b>Military</b>	0	0.0%	249	0.4%	249
<b>Total</b>	31,132	100.0%	59,655	100.0%	90,787

8. **The region's two- and four-year post-secondary institutions graduate more than 5,300 students per year in a variety of disciplines.** Table 14 shows enrollment and graduation figures for regional post-secondary institutions. Combined, these institutions have an enrollment of more than 11,000 students. See Exhibit B-5 in the Appendix for graduates by degree program at each regional institution.
- Significantly, surveyed employers reported minimal interaction with the region's post-secondary training institutions for general and customized training. However, they are pleased with the quality of graduates from these institutions. The most commonly used training institution for workforce development programs is Texas State Technical College. Employers gave the highest ratings to the graduates from Abilene Christian University and Hardin-Simmons University.

**TABLE 14**  
**REGIONAL POST-SECONDARY INSTITUTION'S ENROLLMENT AND GRADUATES**  
Source: U.S. Department of Education

<b>Less-than-four-year institutions</b>	<b>County</b>	<b>City</b>	<b>Total Fall Enrollment (2000)</b>	<b>Total Graduates (2000)</b>
Cisco Junior College	Eastland	Cisco	1,143	272
Western Texas College	Scurry	Snyder	554	185
Central Texas Commercial College	Brown	Brownwood	60	39
American Commercial College	Taylor	Abilene	114	188
Texas State Technical College-Sweetwater	Nolan	Sweetwater	800	354
<b>More-than-four-year institutions</b>				
Abilene Christian University	Taylor	Abilene	3,565	894
Hardin-Simmons University	Taylor	Abilene	1,752	456
Howard Payne University	Brown	Brownwood	1,189	262
McMurray University	Taylor	Abilene	965	195
Ranger College	Eastland	Ranger	588	131
Hendrick Medical Center School of Radiography	Taylor	Abilene	20	19
Stenograph Institute of Texas	Taylor	Abilene	117	34

9. **Most employers rely on very traditional recruiting techniques.** The most commonly used recruiting methods by regional employers include newspaper advertisements, walk-ins/unsolicited resumes, and referrals.

## Abilene Sub-region

- Among the sub-regions, the Abilene sub-region has the largest labor pool, but like the region as a whole, it has a declining labor force.** As seen in Table 15, the sub-region in 2001 had an average civilian labor force of 57,335. Between 1996 and 2001, the labor force declined by 4.5%, slightly slower than the region as a whole.
  - The Abilene sub-region had a slightly higher unemployment rate (3.9%) in 2001 than the region (3.7%), but it is still considerably lower than the state (4.9%) or national averages (4.8%).
  - The Abilene sub-region has a higher proportion of residents actively participating in the workforce than the region overall, but it has a lower labor participation rate than the state and a comparable rate relative to the nation.
  - Among all of the sub-regions, the largest labor pool is within a 30-minute commute zone from 6450 Five Points Parkway in the City of Abilene. Typically, most non-exempt and hourly employees will commute up to 30 minutes for a competitively paying job. Within a 30-minute drive time from the Abilene commute node there is a population base of 149,950 offering a labor force of 68,917. Full demographic and labor force data for the commute zones in all of the sub-regions is provided in Exhibits B-6 and B-7 in the Appendix.

**TABLE 15**  
**SUB-REGION, STATE AND U.S. LABOR FORCE CHARACTERISTICS**

Source: U.S. Bureau of Labor Statistics

<b>Civilian Labor Force (Average Annual)</b>	<b>Abilene</b>	<b>West Ctrl Texas Region</b>	<b>Texas</b>	<b>U.S.</b>
1996	60,035	151,439	9,674,460	133,951,250
2001	57,335	144,404	10,462,712	141,822,250
August 2002	56,267	146,342	10,747,446	142,616,000
% Change '96 - '01	-4.5%	-4.6%	8.1%	5.9%
<b>Unemployment Rate (Average Annual)</b>				
1996	4.9%	4.9%	5.6%	5.4%
2001	3.9%	3.7%	4.9%	4.8%
August 2002	4.4%	4.3%	6.3%	5.7%
<b>Labor Force Participation</b>				
2002	67.4%	61.9%	68.4%	67.8%

2. **Within the Abilene sub-region, employers report satisfactory to good availability for a range of skills.** Employers report satisfactory to good availability for 18 occupations in the Abilene sub-region. As seen in Table 16, these occupations cover a variety of industry groups. Those occupations most readily available from the sub-regional market include teaching assistants, bilingual/multilingual personnel, and entry-level clerical workers.
- Some occupations are marginally available from the Abilene sub-region. As seen in Table 17, employers report marginal availability of seven occupations, including professional, production, technical, and health-related occupations.
  - There are eight occupations that employers report being difficult to find or that are unavailable from the local labor market. These occupations include computer-related occupations, maintenance workers, health care occupations, and construction trades. Applicants willing to work the third shift are also difficult to recruit.

**TABLE 16**  
**AVAILABILITY OF OCCUPATIONS IN THE ABILENE SUB-REGION**  
**AS REPORTED BY EMPLOYERS**

Source: WDG Employer Survey, Summer 2002

<b>Occupation</b>	<b>Average Score</b>	<b>Median Score</b>	<b>Responses</b>
<b>Satisfactory to Good Availability</b>			
Education: teaching assistants, other non-certified personnel	4.2	4.0	6
Bilingual/multilingual personnel	3.9	4.0	7
Clerical workers, entry-level	3.8	4.0	23
Sales, retail	3.6	4.0	5
Hospitality: housekeeping, other service oriented	3.5	4.0	8
Administrative assistants	3.4	4.0	27
Food service: meal preparation	3.4	4.0	8
Unskilled laborers (except manufacturing)	3.6	3.0	7
Accounting clerks	3.5	3.0	33
Truck drivers	3.4	3.0	11
Call center customer service rep. or technicians, inbound, entry-level	3.3	3.0	8
Computer operators	3.3	3.0	8
Technicians (manufacturing, process, overhaul, and maintenance), entry-level	3.3	3.0	7
Clerical workers with advanced computer skills	3.2	3.0	20
Construction trades, general	3.2	3.0	6
Material handlers	3.2	3.0	6

**TABLE 16, continued**  
**AVAILABILITY OF OCCUPATIONS IN THE ABILENE SUB-REGION**  
**AS REPORTED BY EMPLOYERS**

Source: WDG Employer Survey, Summer 2002

Occupation	Average Score	Median Score	Responses
<b>Satisfactory to Good Availability, continued</b>			
Call center customer service rep. or technicians, inbound, experienced	3.1	3.0	7
Management, experienced	3.0	3.0	13
<b>Marginal Availability</b>			
Technicians (manufacturing, process, overhaul, and maintenance), experienced	2.9	3.0	9
Sales, non-retail	2.9	3.0	8
Professionals/management	2.8	3.0	16
Applicants willing to work the second shift	2.8	3.0	13
Computer network administrators	2.7	3.0	12
Engineers, general, entry-level	2.6	3.0	5
Health Services – Technicians (Lab, etc.)	2.6	3.0	5
<b>Poor Availability or Unavailable</b>			
Computer programmers	2.7	2.5	6
Computer/office technical support specialists	2.7	2.5	6
Construction trades, skilled	3.0	2.0	5
Applicants willing to work the third shift	2.6	2.0	7
Maintenance, experienced	2.6	2.0	7
Maintenance mechanics/electricians	2.4	2.0	9
Health Services – Professional (Dr, RN)	2.4	2.0	8
Health Services – Skilled (LPN, CAN, EMT)	2.2	2.0	5

3. **Abilene sub-region employers report slightly unsatisfactory experiences trying to recruit professional and managerial talent from outside the area.** Employers provided a median score of 3.0 and an average score of 2.9 on their ability to recruit professional talent from outside the region. Like the region, one factor contributing to the recruiting difficulties experienced by employers is the limited employment opportunity for “trailing spouses”.
4. **There is a potentially hidden labor force in the Abilene sub-region of approximately 45,854 residents.** This pool of workers consists of currently-not-employed residents interested in employment, employed residents interested in training for career advancement, and recent college graduates. Table 17 provides details on the hidden labor force in the Abilene sub-region.
  - Approximately 59.3% of residents currently not employed (i.e., unemployed and not participating in the labor force) in the Abilene sub-region are interested in working. This equates to 19,100 residents that could potentially enter the labor market, of which 66.7% report that they have no limitations to working. The most frequently mentioned work limitation is the lack of jobs matching the surveyed respondents’ level of education/training.
  - An additional 47.2% of employed residents would be interested in training to acquire new job skills, which amounts to 25,400 residents. The most common retraining preferences among currently employed Abilene sub-region residents are for professional medical services, professional computer-related occupations, and computer-related support staff.
  - The Abilene sub-region is home to many of the region’s post-secondary institutions; namely, Abilene Christian University, Hardin-Simmons University, McMurray University, Cisco Junior College, and Texas State Technical College. These institutions graduate more than 1,350 students annually.

**TABLE 17**  
**HIDDEN LABOR SUPPLY COMPONENTS IN THE ABILENE SUB-REGION**

Source: WDG Employer Survey and YA/WDG Residential Survey, Summer 2002, U.S. Department of Education

Labor Supply	Number
Not employed but interested in employment	19,100
Currently employed but interested in training	25,400
Recent college graduates	1,300
<b>Total available labor supply</b>	<b>45,800</b>

5. **Dyess Air Force Base is located in the Abilene sub-region.** Dyess Air Force Base is located on the southwest side of the City of Abilene. It is home to the B-1 Bomber and is the nation's only B-1 training ground. Dyess Air Force Base is home to the 7<sup>th</sup> Bomb Wing, which includes 40 of the Air Force's 92 B-1 bombers. However, Dyess must prepare for changes that are expected in the B-1 fleet in the next year, including cuts that will reduce the number of active aircraft from 92 to 60. Dyess will likely lose eight aircraft, going from 40 to 32. Dyess could gain some other B-1 training issues that are currently conducted elsewhere, which will be a plus for the base. The base is also Abilene's largest single employer and the largest economic influence in the area. It is estimated that 1,700 indirect or non-military jobs are created as a result of its presence in the area.
  - There are approximately 5,400 enlisted military personnel at the base and more than 6,000 family members (including an estimated 2,000-2,500 spouses). Spouses of military personnel and exiting military (including separating and retiring) comprise an important component of Taylor County's workforce.
6. **According to residential survey results, over 98% of Taylor County residents work in Taylor County.** For residents commuting outside their county of residence for employment in the rest of the West Central Texas region, Taylor County is the most frequent destination. Jones and Callahan Counties are the largest sources of labor traveling into Taylor County for employment.
7. **Employers in the Abilene sub-region rely on traditional recruiting techniques.** The most commonly used methods include newspaper advertising, referrals, and walk-ins/unsolicited resumes.

## Brownwood Sub-region

1. **The Brownwood sub-region has a small labor force that has been declining.** While the labor force is small, the Brownwood sub-region has the second-largest labor force after the Abilene sub-region, with a 2001 average civilian labor force of 26,744. As seen in Table 18, between 1996 and 2001 the labor force declined by 2.9%, slower than the regional rate of 4.6%.
  - The sub-region has a very low unemployment rate. In August 2002, the sub-region's unemployment rate was 4.1%, lower than the regional rate (4.3%), the state rate (6.3%), and the national rate (5.7%).
  - The Brownwood sub-region's participation rate (58.2%) is lower than the region (61.9%), the state (68.4%), or the nation (67.8%).
  - Within a 30-minute drive time of 2800 Morris Sheppard Drive in Brownwood, there is an estimated labor pool of 14,665.

**TABLE 18**  
**SUB-REGION, STATE, AND U.S. LABOR FORCE CHARACTERISTICS**

Source: U.S. Bureau of Labor Statistics

Civilian Labor Force (Average Annual)	Brownwood	West Ctr Texas Region	Texas	U.S.
1996	27,552	151,439	9,674,460	133,951,250
2001	26,744	144,404	10,462,712	141,822,250
August 2002	27,362	146,342	10,747,446	142,616,000
% Change '96 - '01	-2.9%	-4.6%	8.1%	5.9%
Unemployment Rate (Average Annual)				
1996	6.0%	4.9%	5.6%	5.4%
2001	3.6%	3.7%	4.9%	4.8%
August 2002	4.1%	4.3%	6.3%	5.7%
Labor Force Participation				
2002	58.2%	61.9%	68.4%	67.8%

2. **Among all of the sub-regions in the West Central Texas study area, excluding the Abilene sub-region, there is mixed availability of occupational skills.** As seen in Table 19, sufficient data was received from employers to gauge the availability of 22 occupations in the 18 counties surrounding Taylor County. Of those 22 occupations, employers report satisfactory-to-good availability of seven occupations. The occupations most readily available from the regional labor force include entry-level clerical workers, bilingual/multilingual personnel, and clerical workers with advanced computer skills.
- Some occupations are marginally available from the regional labor force. These include unskilled non-manufacturing laborers, experienced maintenance, general construction trades, and maintenance mechanics/electricians.
  - Employers report that there is limited or non-existent availability of 10 occupations in the area's labor market. The most difficult to recruit include management trainees, skilled health services (LPN, RN, EMT), and general engineers.

**TABLE 19**  
**AVAILABILITY OF OCCUPATIONS IN THE WEST CENTRAL TEXAS SUB-REGIONS**  
**(EXCLUDING TAYLOR COUNTY) AS REPORTED BY EMPLOYERS**

Source: WDG Employer Survey, Summer 2002

Occupation	Average Score	Median Score	Responses
<b>Satisfactory to Good Availability</b>			
Clerical workers, entry-level	4.7	5.0	12
Bilingual/multilingual personnel	3.7	4.0	6
Clerical workers with advanced computer skills	3.3	3.0	8
Computer operators	3.2	3.0	5
Applicants willing to work the second shift	3.1	3.0	12
Food service: meal preparation	3.1	3.0	11
Administrative assistants	3.1	3.0	10
<b>Marginal Availability</b>			
Unskilled laborers (except manufacturing)	2.8	3.0	5
Maintenance, experienced	2.7	3.0	10
Construction trades, general	2.6	3.0	7
Maintenance mechanics/electricians	2.4	3.0	7
<b>Limited Availability or Unavailable</b>			
Education: certified teachers/administrators	3.0	2.5	6
Computer/office technical support specialists	2.8	2.5	6
Health services: professional (Dr, RN)	2.5	2.5	6

**TABLE 19, *continued***  
**AVAILABILITY OF OCCUPATIONS IN THE WEST CENTRAL TEXAS SUB-REGIONS**  
**(EXCLUDING TAYLOR COUNTY) AS REPORTED BY EMPLOYERS**  
 Source: WDG Employer Survey, Summer 2002

Occupation	Average Score	Median Score	Responses
<b>Limited Availability or Unavailable, <i>continued</i></b>			
Accounting clerks	3.2	2.0	16
Computer network administrators	2.6	2.0	5
Management, experienced	2.3	2.0	6
Construction trades, skilled	1.7	2.0	6
Engineers, general, entry-level	1.5	1.5	6
Health services: skilled (LPN, CAN, EMT)	2.0	1.0	5
Management trainees	1.8	1.0	5

3. **Employers in the six sub-regions report greater difficulty recruiting professional and managerial talent from outside the region than do employers in the Abilene sub-region.** Employers provided a median score of 3.0 and an average score of 2.6 (where 1=poor and 5=excellent) on their ability to recruit professional and managerial talent from outside the region.
- Employers reported very limited opportunities for “trailing spouses”. On the rating scale of 1 to 5, employers gave a median score of 2.0 and an average score of 2.2 for opportunities available for spouses.
4. **Based on the demographic profile of the sub-region and residential survey results, it is estimated that there is a hidden labor supply of 20,500 residents.** Table 20 shows the groups comprising the hidden labor force that could be available to new and expanding employers.
- Approximately 57.6% of currently-non-employed residents indicate that they would be interested in working, which amounts to 8,000 residents. 51.5% of these residents report no limitations to working. The second most frequently mentioned work limitation is dependent care obligations.
  - Roughly 46% of currently employed residents would be interested in training to upgrade their job skills for career development. This amounts to 12,000 residents interested in enhancing their skills. The top preferences for retraining include computer-related professional and support staff, professional medical services, and business services.
  - Graduates from local post-secondary institutions such as Texas State Technical College- Brownwood, Central Texas Commercial College, and Howard Payne University graduate just under 500 students per year.

**TABLE 20**  
**HIDDEN LABOR SUPPLY COMPONENTS IN THE BROWNWOOD SUB-REGION**  
 Source: WDG Employer Survey and YA/WDG Residential Survey, Summer 2002,  
 U.S. Department of Education

Labor Supply	Number
Not employed but interested in employment	8,000
Currently employed but interested in training	12,000
Recent college/technical school graduates	500
<b>Total available labor supply</b>	<b>20,500</b>

5. **Employers in the six sub-regions rely on traditional recruiting techniques.** The most commonly used methods include newspaper advertising, walk-ins/unsolicited resumes, and word of mouth.

## Sweetwater Sub-region

1. **The Sweetwater sub-region has a small labor force that is declining at a rate faster than the region.** As seen in Table 21, the sub-region had a 2001 average annual civilian labor force of 14,990, which was down 7.6% from 1996.
  - The sub-region's unemployment rate (4.6% in August 2002) is higher than the region's (4.3%), but still lower than the state (6.3%) or national (5.7%) averages.
  - The percentage of residents actively participating in the labor force (59.4%) is lower than the regional participation rate (61.9%). This indicates that additional residents could potentially enter the workforce if the right opportunities became available to meet regional standards.
  - Within a 30-minute drive time of 110 E. Broadway Avenue, there is an estimated labor force of 6,757. Full demographic and labor force data for the commute zones is provided in Exhibits B-6 and B-7.

**TABLE 21**  
**SUB-REGION, STATE, AND U.S. LABOR FORCE CHARACTERISTICS**

Source: U.S. Bureau of Labor Statistics

Civilian Labor Force (Average Annual)	Sweetwater	West Ctrl Texas Region	Texas	U.S.
1996	16,231	151,439	9,674,460	133,951,250
2001	14,990	144,404	10,462,712	141,822,250
August 2002	15,138	146,342	10,747,446	142,616,000
% Change '96 - '01	-7.6%	-4.6%	8.1%	5.9%
Unemployment Rate (Average Annual)				
1996	5.8%	4.9%	5.6%	5.4%
2001	4.3%	3.7%	4.9%	4.8%
August 2002	4.6%	4.3%	6.3%	5.7%
Labor Force Participation				
2002	59.4%	61.9%	68.4%	67.8%

2. **The labor force available to new and expanding employers in the Sweetwater sub-region includes 4,000 residents currently not employed but interested in work, and 3,700 currently employed residents that are interested in training to upgrade their skills.** Table 22 provides details on this hidden labor force in the Sweetwater sub-region. There is a total of 7,800 residents that may be available to new and expanding employers.
  - Approximately 40% of residents not currently employed are interested in working. 80% of these residents have no limitations to working. The second most common limitation to working was a disability, which was cited by the remaining 20% of not-employed residents interested in working.
  - Roughly 25.6% of employed residents are interested in training to upgrade their skills for career advancement. The top retraining preferences are in computer-related support staff occupations and professional medical services.
  - Recent graduates from post-secondary institutions, including Texas State Technical College-Sweetwater, are another source of labor for employers.

**TABLE 22**  
**HIDDEN LABOR SUPPLY COMPONENTS IN THE SWEETWATER SUB-REGION**

Source: WDG Employer Survey and YA/WDG Residential Survey, Summer 2002, U.S. Department of Education

Labor Supply	Number
Not employed but interested in employment	4,000
Currently employed but interested in training	3,700
Recent college/technical school graduates	100
<b>Total available labor supply</b>	<b>7,800</b>

## Snyder Sub-region

- As with several of the other sub-regions, the Snyder sub-region has a small labor force that is rapidly declining. The average annual civilian labor force in the Snyder sub-region consists of 9,758 residents in 2001. Between 1996 and 2001, the civilian labor force declined by 10.3%, one of the fastest among all of the sub-regions. Table 23 shows the sub-region's labor force characteristics.
  - The sub-region's unemployment rate (4.8% in August 2002) is higher than the region's average (4.3%), but still lower than the state (6.3%) or national (5.7%) averages.
  - The sub-region has a low labor participation rate, indicating that additional residents can enter the labor force to meet regional, state, and national standards. In 2002 the labor force participation rate was 58.8%.
  - The commute node for the Snyder sub-region is located at 1201 Lorber Lane in Snyder. Within 30 minutes of this site, there is an estimated population base of 14,681 providing a civilian labor force of 6,346.

**TABLE 23**  
**SUB-REGION, STATE, AND U.S. LABOR FORCE CHARACTERISTICS**  
 Source: U.S. Bureau of Labor Statistics

Civilian Labor Force (Average Annual)	Snyder	West Ctrl Texas Region	Texas	U.S.
1996	10,883	151,439	9,674,460	133,951,250
2001	9,758	144,404	10,462,712	141,822,250
August 2002	10,005	146,342	10,747,446	142,616,000
% Change '96 - '01	-10.3%	-4.6%	8.1%	5.9%
Unemployment Rate (Average Annual)				
1996	4.4%	4.9%	5.6%	5.4%
2001	4.5%	3.7%	4.9%	4.8%
August 2002	4.8%	4.3%	6.3%	5.7%
Labor Force Participation				
2002	58.8%	61.9%	68.4%	67.8%

- There is a hidden labor supply of 6,186 residents in the Snyder sub-region. As seen in Table 24, the labor reserve consists of residents not currently employed but interested in employment, and currently employed residents interested in upgrading their skills.
  - Approximately 63.2% or 3,500 of residents not currently in the workforce are interested in employment. 52.6% of these residents have no limitations to working. The most frequently mentioned work limitation is the lack of jobs in the area of education/training, cited by 26.3% of respondents.
  - 26.9% or 2,600 of currently employed residents would be interested in training for career advancement. The most common preferences for retraining include training for occupations in business services and finance-insurance-and-real-estate.
  - There are approximately 100 annual graduates from West Texas College located in Snyder.

**TABLE 24**  
**HIDDEN LABOR SUPPLY COMPONENTS IN THE SNYDER SUB-REGION**  
 Source: WDG Employer Survey and YA/WDG Residential Survey, Summer 2002,  
 U.S. Department of Education

Labor Supply	Number
Not employed but interested in employment	3,500
Currently employed but interested in training	2,600
Recent college graduates	100
<b>Total available labor supply</b>	<b>6,200</b>

## Haskell Sub-region

1. **The Haskell sub-region has a civilian labor force of 14,139 (2001 annual average).** The civilian labor force in the Haskell sub-region has been declining since 1996. Between 1996 and 2001, the labor force declined by 7.4%, which is faster than the regional decline of 4.6%. See Table 25.
  - The Haskell sub-region's unemployment rate in August 2002 (4.1%) was below the regional unemployment rate (4.3%) as well as the state rate (6.3%) and national rate (5.7%).
  - Approximately 59.1% of residents in the Haskell sub-region participate in the workforce compared to 61.9% regionally, 68.4% in Texas, and 67.8% nationally.
  - Within a 30-minute drive time from 301 South 1st Street in Haskell, there is an estimated labor force of 4,35 residents.

**TABLE 25**  
**SUB-REGION, STATE AND U.S. LABOR FORCE CHARACTERISTICS**

Source: U.S. Bureau of Labor Statistics

Civilian Labor Force (Average Annual)	Haskell	West Ctrl Texas Region	Texas	U.S.
1996	15,262	151,439	9,674,460	133,951,250
2001	14,139	144,404	10,462,712	141,822,250
August 2002	16,638	146,342	10,747,446	142,616,000
% Change '96 - '01	-7.4%	-4.6%	8.1%	5.9%
Unemployment Rate (Average Annual)				
1996	3.7%	4.9%	5.6%	5.4%
2001	2.9%	3.7%	4.9%	4.8%
August 2002	4.1%	4.3%	6.3%	5.7%
Labor Force Participation				
2002	59.1%	61.9%	68.4%	67.8%

2. **Within the Haskell sub-region, there is an estimated labor reserve of 8,300 residents that could be available to new and expanding employers.** This labor pool consists of not-employed residents interested in working, and currently employed residents interested in training for skills development. See Table 26.
  - 42.9% of residents not currently employed in the Haskell sub-region would be interested in employment. This equates to 3,200 residents.
  - There are approximately 5,100 currently employed residents, or approximately 42.9% of the employed population, that would be interested in training for skills enhancement.

**TABLE 26**  
**HIDDEN LABOR SUPPLY COMPONENTS IN THE HASKELL SUB-REGION**

Source: WDG Employer Survey and YA/WDG Residential Survey, Summer 2002,  
U.S. Department of Education

Labor Supply	Number
Not employed but interested in employment	3,200
Currently employed but interested in training	5,100
<b>Total available labor supply</b>	<b>8,300</b>

## Breckenridge Sub-region

1. **The Breckenridge sub-region has the smallest civilian labor force, with approximately 5,817 residents (2001 annual average).** The Breckenridge sub-region is also experiencing one of the fastest rates of decline. Between 1996 and 2001, the civilian labor force declined by 10.4%, compared to the regional decline of 4.6%. See Table 27
  - The Breckenridge sub-region has one of the lowest labor participation rates in the region. Approximately 58% of the sub-region's working-age population is actively participating in the workforce.
  - In August 2002, the sub-region had a significantly higher unemployment rate (5.2%) relative to the region (4.3%), but it was still below the state rate (6.3%) and the national rate (5.7%).
  - Within a 30-minute drive time from 2410 West Walker Street in Breckenridge, there is a population base of 11,191 providing a labor pool of 4,391.

**TABLE 27**  
**SUB-REGION, STATE, AND U.S. LABOR FORCE CHARACTERISTICS**  
 Source: U.S. Bureau of Labor Statistics

<b>Civilian Labor Force (Average Annual)</b>	<b>Breckenridge</b>	<b>West Ctrl Texas Region</b>	<b>Texas</b>	<b>U.S.</b>
1996	6,489	151,439	9,674,460	133,951,250
2001	5,817	144,404	10,462,712	141,822,250
August 2002	6,052	146,342	10,747,446	142,616,000
% Change '96 - '01	-10.4	-4.6%	8.1%	5.9%
<b>Unemployment Rate (Average Annual)</b>				
1996	3.7%	4.9%	5.6%	5.4%
2001	2.8%	3.7%	4.9%	4.8%
August 2002	5.2%	4.3%	6.3%	5.7%
<b>Labor Force Participation</b>				
2002	58.0%	61.9%	68.4%	67.8%

2. **The Breckenridge sub-region has a hidden labor supply of 3,900 residents that could be available for new and expanding employers.** See Table 28.
  - Approximately 39.3% of residents currently not employed are interested in employment. This amounts to 1,600 residents.
  - An additional 2,200 individuals are currently employed but would be interested in training to upgrade their skills.
  - Local post-secondary schools such as Texas State Technical College–Breckenridge graduate approximately 100 students annually.

**TABLE 28**  
**HIDDEN LABOR SUPPLY COMPONENTS IN THE BRECKENRIDGE SUB-REGION**  
 Source: WDG Employer Survey and YA/WDG Residential Survey, Summer 2002,  
 U.S. Department of Education

<b>Labor Supply</b>	<b>Number</b>
Not employed but interested in employment	1,600
Currently employed but interested in training	2,200
Recent college graduates	100
<b>Total available labor supply</b>	<b>3,900</b>

## Eastland Sub-region

1. **The Eastland sub-region has a small civilian labor pool; however, it is the only sub-region to experience an increase in its workforce.** In 2001, the Eastland sub-region had an annual civilian labor force of 15,621 residents, which was a 4.2% increase since 1996. See Table 29.
  - The Eastland sub-region's most recently reported unemployment rate was 3.8%, significantly lower than the regional rate (4.3%), the state rate (6.3%), or the national rate (5.7%).
  - The sub-region has the lowest labor participation rate among all of the sub-regions. Only 56.6% of working-age residents are actively participating in the workforce.
  - The commute zone node for the Eastland sub-region is located at 100 West Main in Eastland. Within a 30-minute drive time of this site, there is a population of 15,359 providing a labor force of 7,689.

**TABLE 29**  
**SUB-REGION, STATE, AND U.S. LABOR FORCE CHARACTERISTICS**  
 Source: U.S. Bureau of Labor Statistics

Civilian Labor Force (Average Annual)	Eastland	West Ctrl Texas Region	Texas	U.S.
1996	14,987	151,439	9,674,460	133,951,250
2001	15,621	144,404	10,462,712	141,822,250
August 2002	16,880	146,342	10,747,446	142,616,000
% Change '96 - '01	4.2%	-4.6%	8.1%	5.9%
Unemployment Rate (Average Annual)				
1996	4.4%	4.9%	5.6%	5.4%
2001	3.6%	3.7%	4.9%	4.8%
August 2002	3.8%	4.3%	6.3%	5.7%
Labor Force Participation				
2002	56.6%	61.9%	68.4%	67.8%

2. **As seen in Table 30, there is a labor reserve of 11,300 in the Eastland sub-region.**
  - There are 3,000 residents currently not employed that would be interested in employment. This amounts to 66.7% of all non-employed residents.
  - There are a large number of currently employed residents that would be interested in training for career development. Approximately 51.1% of employed residents, the highest percentage among all of the sub-regions, would be interested in upgrading their skills. This amounts to 8,300 residents.

**TABLE 30**  
**HIDDEN LABOR SUPPLY COMPONENTS IN THE EASTLAND SUB-REGION**  
 Source: WDG Employer Survey and YA/WDG Residential Survey, Summer 2002,  
 U.S. Department of Education

Labor Supply	Number
Not employed but interested in employment	3,000
Currently employed but interested in training	8,300
<b>Total available labor supply</b>	<b>11,300</b>

# LABOR DEMAND

## West Central Texas Region

1. **Currently across the West Central Texas region, the occupations in highest demand are in health services.** Employers are also looking for applicants to work the second shift. WDG asked employers to identify the positions that they are currently trying to fill. Table 31 identifies those positions as reported by the responding surveyed employers. The actual number of needed job applicants across the region are well above those included in the table, as these numbers only reflect the demand of responding surveyed employers. The positions in demand cover all industry sectors.

**TABLE 31**  
**OCCUPATIONS CURRENTLY IN DEMAND BY REGIONAL EMPLOYERS**  
**RESPONDING TO THE WDG SURVEY**  
 Source: WDG Employer Survey, Summer 2002

Occupation	# Currently Needed	% of Total Demand
Applicants willing to work 2nd shift	139	12.6%
Health services: professional	101	9.1%
Health services: skilled	96	8.7%
Call center CSR/technicians Inbound: entry-level	66	6.0%
Clerical workers: entry-level	63	5.7%
Construction trades: general	41	3.7%
Unskilled laborers: except mfg	40	3.6%
Construction trades: skilled	39	3.5%
Hospitality: housekeeping, other	38	3.4%
Food service: meal prep	36	3.3%
Education: teaching assts, other non-certified	29	2.6%
Unskilled laborers: mfg	28	2.5%
Professionals/management	25	2.3%
Applicants willing to work 3rd shift	24	2.2%
Clerical workers: advanced computer skills	24	2.2%
Truck drivers	23	2.1%
Food service: wait staff	21	1.9%
Management: experienced	21	1.9%
Health services: technicians	20	1.8%
Bench assembly workers	19	1.7%
Accounting clerks	17	1.5%
Administrative assistants	16	1.4%
Education: certified teachers/admin	15	1.4%
Heavy equipment operators	14	1.3%
Sales: retail	14	1.3%
Bilingual/multilingual personnel	13	1.2%
Sales: non-retail	13	1.2%

2. **In six months, employers anticipate trying to find applicants to work second shifts, as well as health services, skilled and professional, and clerical workers.** The actual number of needed job applicants across the region are well above those included in the table, as these numbers only reflect the demand of responding surveyed employers. See Table 32.

**TABLE 32**  
**OCCUPATIONS PROJECTED TO BE IN DEMAND IN SIX MONTHS**  
**BY REGIONAL EMPLOYERS RESPONDING TO THE WDG SURVEY**  
 Source: WDG Employer Survey, Summer 2002

Occupation	# Needed in Six Months	% of Total Demand
Applicants willing to work 2nd shift	337	17.7%
Health services: skilled	221	11.6%
Health services: professional	105	5.5%
Clerical workers: entry-level	90	4.7%
Call center CSR/technicians Inbound: entry-level	88	4.6%
Construction trades: general	84	4.4%
Sales: non-retail	67	3.5%
Seasonal workers	64	3.4%
Unskilled laborers: mfg	61	3.2%
Bench assembly workers	54	2.8%
Construction trades: skilled	50	2.6%
Hospitality: housekeeping, other	50	2.6%
Food service: meal prep	45	2.4%
Bilingual/multilingual personnel	43	2.3%
Food service: wait staff	39	2.0%
Applicants willing to work 3rd shift	36	1.9%
Unskilled laborers: except mfg	34	1.8%
Education: teaching assts, other non-certified	31	1.6%
Truck drivers	31	1.6%
Clerical workers: advanced computer skills	29	1.5%
Material handlers	28	1.5%
Accounting clerks	24	1.3%
Administrative assistants	21	1.1%
Sales: retail	19	1.0%

3. **In one year, the occupations in demand will be similar to those in demand currently and in six months.** The occupations in highest demand include applicants willing to work the second shift, skilled health services, and entry-level clerical workers. The actual number of needed job applicants across the region are well above those included in the table, as these numbers only reflect the demand of responding surveyed employers.

**TABLE 33**  
**OCCUPATIONS PROJECTED TO BE IN DEMAND IN ONE YEAR BY**  
**REGIONAL EMPLOYERS RESPONDING TO THE WDG SURVEY**  
 Source: WDG Employer Survey, Summer 2002

Occupation	# Needed in One Year	% of Total Demand
Applicants willing to work 2nd shift	439	15.1%
Health services: skilled	323	11.1%
Clerical workers: entry-level	154	5.3%
Health services: professional	151	5.2%
Sales: non-retail	141	4.9%
Construction trades: general	111	3.8%
Seasonal workers	108	3.7%
Call center CSR/technicians Inbound: entry-level	103	3.6%

**TABLE 33, continued**  
**OCCUPATIONS PROJECTED TO BE IN DEMAND IN ONE YEAR BY**  
**REGIONAL EMPLOYERS RESPONDING TO THE WDG SURVEY**  
 Source: WDG Employer Survey, Summer 2002

Occupation	# Needed in One Year	% of Total Demand
Bench assembly workers	90	3.1%
Unskilled laborers: mfg	79	2.7%
Hospitality: housekeeping, other	78	2.7%
Food service: meal prep	75	2.6%
Applicants willing to work 3rd shift	66	2.3%
Bilingual/multilingual personnel	60	2.1%
Construction trades: skilled	57	2.0%
Clerical workers: advanced computer skills	55	1.9%
Food service: wait staff	54	1.9%
Material handlers	48	1.7%
Technicians: mfg, process, etc - entry-level	47	1.6%
Education: teaching assts, other non-certified	46	1.6%
Technicians: mfg, process, etc - experienced	46	1.6%
Truck drivers	43	1.5%
Unskilled laborers: except mfg	42	1.4%
Education: certified teachers/admin	40	1.4%
Administrative assistants	35	1.2%
Machine operators: no set-up	35	1.2%
Accounting clerks	33	1.1%
Professionals/management	32	1.1%
New or emerging jobs	28	1.0%

## Abilene Sub-region

1. In the Abilene sub-region, the occupations currently in demand by local employers include applicants willing to work the second shift and professional and skilled health services. Clerical workers also will be in demand. The actual number of needed job applicants across the sub-region are well above those included in the table, as these numbers only reflect the demand of responding surveyed employers. See Table 34.

**TABLE 34**  
**OCCUPATIONS CURRENTLY IN DEMAND BY TAYLOR COUNTY EMPLOYERS**  
**RESPONDING TO THE WDG SURVEY**  
 Source: WDG Employer Survey, Summer 2002

Occupation	# Currently Needed	% of Total Demand
Applicants willing to work the second shift	92	11.4%
Health services: professional (e.g., Dr, RN)	78	9.7%
Health services: skilled (e.g., LPN, CAN, EMT)	74	9.2%
Call center customer service rep. or technicians, inbound, entry-level	65	8.1%
Clerical workers, entry-level	56	7.0%
Construction trades, skilled	35	4.4%
Hospitality: housekeeping, other service oriented	31	3.9%
Unskilled laborers (except manufacturing)	25	3.1%
Professionals/management	24	3.0%
Truck drivers	22	2.7%

**TABLE 34, continued**  
**OCCUPATIONS CURRENTLY IN DEMAND BY TAYLOR COUNTY EMPLOYERS**  
**RESPONDING TO THE WDG SURVEY**  
Source: WDG Employer Survey, Summer 2002

Occupation	# Currently Needed	% of Total Demand
Clerical workers with advanced computer skills	21	2.6%
Food service --: meal preparation	21	2.6%
Construction trades, general	20	2.5%
Food service: wait staff	19	2.4%
Health services: technicians (lab, etc.)	18	2.2%
Applicants willing to work the third shift	15	1.9%
Management, experienced	15	1.9%
Accounting clerks	13	1.6%
Administrative assistants	13	1.6%
Education: teaching assistants, other non-certified personnel	13	1.6%
Sales, non-retail	13	1.6%
Sales, retail	13	1.6%
Bench assembly workers	10	1.2%
Heavy equipment operators	10	1.2%
Bilingual/multilingual personnel	9	1.1%
Education: certified teachers/administrators	9	1.1%
Call center customer service rep. or technicians, inbound, experienced	8	1.0%
Seasonal workers	8	1.0%

2. **Table 35 shows those occupations projected to be in demand in six months by Abilene sub-region employers.** In six months, employers anticipate trying to fill the same occupations that are currently in demand, including applicants willing to work the second shift, and professional and skilled health services. The actual number of needed job applicants across the sub-region are well above those included in the table, as these numbers only reflect the demand of responding surveyed employers.

**TABLE 35**  
**OCCUPATIONS PROJECTED TO BE IN DEMAND IN SIX MONTH BY TAYLOR COUNTY**  
**EMPLOYERS RESPONDING TO THE WDG SURVEY**  
Source: WDG Employer Survey, Summer 2002

Occupation	# Needed in Six Months	% of Total Demand
Applicants willing to work the second shift	218	16.1%
Health services: skilled (e.g., LPN, CAN, EMT)	206	15.2%
Health services: professional (e.g., Dr, RN)	87	6.4%
Call center customer service rep. or technicians, inbound, entry-level	83	6.1%
Sales, non-retail	66	4.9%
Clerical workers, entry-level	63	4.6%
Seasonal workers	57	4.2%
Hospitality: housekeeping, other service oriented	44	3.2%
Construction trades, skilled	43	3.2%
Bilingual/multilingual personnel	40	2.9%
Food service: meal preparation	36	2.7%
Food service: wait staff	36	2.7%
Construction trades, general	28	2.1%
Truck drivers	28	2.1%
Clerical workers with advanced computer skills	26	1.9%

**TABLE 35, continued**  
**OCCUPATIONS PROJECTED TO BE IN DEMAND IN SIX MONTH BY TAYLOR COUNTY**  
**EMPLOYERS RESPONDING TO THE WDG SURVEY**  
 Source: WDG Employer Survey, Summer 2002

Occupation	# Needed in Six Months	% of Total Demand
Applicants willing to work the third shift	25	1.8%
Unskilled laborers (except manufacturing)	25	1.8%
Accounting clerks	17	1.3%
Sales, retail	16	1.2%
Administrative assistants	15	1.1%
Professionals/management	15	1.1%
Education: teaching assistants, other non-certified personnel	14	1.0%
Health services: technicians (lab, etc.)	14	1.0%
Unskilled laborers (manufacturing)	14	1.0%
Bench assembly workers	13	1.0%

3. **Table 36 shows those occupations projected to be in demand in one year by Abilene sub-region employers.** In one year, employers anticipate trying to fill the same occupations that are currently in demand and will be in demand in six months, including applicants willing to work the second shift, and professional and skilled health services. However, *skilled health service occupations* is ranked first in number of positions that will need to be filled. The actual number of needed job applicants across the sub-region is well above those included in the table, as these numbers only reflect the demand of responding surveyed employers.

**TABLE 36**  
**OCCUPATIONS PROJECTED TO BE IN DEMAND IN ONE YEAR BY TAYLOR COUNTY**  
**EMPLOYERS RESPONDING TO THE WDG SURVEY**  
 Source: WDG Employer Survey, Summer 2002

Occupation	# Needed in One Year	% of Total Demand
Health services: skilled (e.g., LPN, CAN, EMT)	307	15.8%
Applicants willing to work the second shift	254	13.0%
Health services: professional (e.g., Dr, RN)	133	6.8%
Sales, non-retail	131	6.7%
Call center customer service rep. or technicians, inbound, entry-level	92	4.7%
Clerical workers, entry-level	81	4.2%
Hospitality: housekeeping, other service oriented	72	3.7%
Seasonal workers	70	3.6%
Food service: meal preparation	60	3.1%
Bilingual/multilingual personnel	51	2.6%
Food service: wait staff	51	2.6%
Applicants willing to work the third shift	50	2.6%
Clerical workers with advanced computer skills	46	2.4%
Construction trades, skilled	44	2.3%
Technicians (manufacturing, process, overhaul, and maintenance), experienced	40	2.1%
Truck drivers	37	1.9%
Unskilled laborers (except manufacturing)	35	1.8%
Construction trades, general	29	1.5%
Professionals/management	27	1.4%
Accounting clerks	24	1.2%
Education: teaching assistants, other non-certified personnel	23	1.2%

**TABLE 36, continued**  
**OCCUPATIONS PROJECTED TO BE IN DEMAND IN ONE YEAR BY TAYLOR COUNTY**  
**EMPLOYERS RESPONDING TO THE WDG SURVEY**  
 Source: WDG Employer Survey, Summer 2002

Occupation	# Needed in One Year	% of Total Demand
Administrative assistants	21	1.1%
Technicians (manufacturing, process, overhaul, and maintenance), entry-level	21	1.1%
Management, experienced	20	1.0%
Bench assembly workers	19	1.0%

## West Central Texas Sub-regions, Excluding the Abilene Sub-region

1. In the remaining sub-regions, employers are currently trying to find applicants willing to work the second shift, unskilled manufacturing laborers, and professional health services. The actual number of needed job applicants across the area is well above those included in the table, as these numbers only reflect the demand of responding surveyed employers. See Table 37.

**TABLE 37**  
**OCCUPATIONS CURRENTLY IN DEMAND BY SUB-REGIONAL EMPLOYERS**  
**RESPONDING TO THE WDG SURVEY**  
 Source: WDG Employer Survey, Summer 2002

Occupation	# Currently Needed	% of Total
Applicants willing to work the second shift	47	16.1%
Unskilled laborers (manufacturing)	24	8.2%
Health services: professional (e.g., Dr, RN)	23	7.9%
Health services: skilled (e.g., LPN, CAN, EMT)	22	7.5%
Construction trades, general	21	7.2%
Education: teaching assistants, other non-certified personnel	16	5.5%
Food service: meal preparation	15	5.1%
Unskilled laborers (except manufacturing)	15	5.1%
Bench assembly workers	9	3.1%
Clerical workers, entry-level	7	2.4%
Hospitality: housekeeping, other service oriented	7	2.4%
Machine operators, no setup	7	2.4%
Education: certified teachers/administrators	6	2.1%
Management, experienced	6	2.1%
Technicians (manufacturing, process, overhaul, and maintenance), experienced	6	2.1%
Material handlers	5	1.7%
Accounting clerks	4	1.4%
Bilingual/multilingual personnel	4	1.4%
Construction trades, skilled	4	1.4%
Heavy equipment operators	4	1.4%
Administrative assistants	3	1.0%
Clerical workers with advanced computer skills	3	1.0%
Machine operators, with setup	3	1.0%

2. **In six months, employers anticipate trying to find applicants to work second shifts, as well as general construction trades and unskilled manufacturing laborers.** The actual number of needed job applicants across the area is well above those included in the table, as these numbers only reflect the demand of responding surveyed employers. See Table 38.

**TABLE 38**  
**OCCUPATIONS PROJECTED TO BE IN DEMAND IN ONE YEAR BY SUB-REGIONAL EMPLOYERS RESPONDING TO THE WDG SURVEY**

Source: WDG Employer Survey, Summer 2002

Occupation	# Needed In Six Months	% of Total
Applicants willing to work the second shift	119	22.1%
Construction trades, general	56	10.4%
Unskilled laborers (manufacturing)	47	8.7%
Bench assembly workers	41	7.6%
Clerical workers, entry-level	27	5.0%
Material handlers	23	4.3%
Health Services: professional (e.g., Dr, RN)	18	3.3%
Education: teaching assistants, other non-certified personnel	17	3.2%
Machine operators, no setup	17	3.2%
Health services: skilled (e.g., LPN, CAN, EMT)	15	2.8%
New or emerging jobs (list)	11	2.0%
Food service: meal preparation	9	1.7%
Maintenance, experienced	9	1.7%
Unskilled laborers (except manufacturing)	9	1.7%
Accounting clerks	7	1.3%
Construction trades, skilled	7	1.3%
Seasonal workers	7	1.3%
Administrative assistants	6	1.1%
Education: Certified teachers/administrators	6	1.1%
Heavy equipment operators	6	1.1%
Hospitality: housekeeping, other service oriented	6	1.1%
Machine operators, with setup	6	1.1%
Machinists	6	1.1%
Maintenance mechanics/electricians	6	1.1%
Technicians (manufacturing, process, overhaul, and maintenance), experienced	6	1.1%

3. **Employers will still be trying to find applicants willing to work the second shift in one year, as well as general construction trades and entry-level clerical workers.** Table 39 shows those occupations in greatest demand in one year among those employers in all of the sub-regions, excluding the Abilene sub-region. The actual number of needed job applicants across the region is well above those included in the table, as these numbers only reflect the demand of responding surveyed employers.

**TABLE 39**  
**OCCUPATIONS PROJECTED TO BE IN DEMAND IN ONE YEAR BY SUB-REGIONAL EMPLOYERS RESPONDING TO THE WDG SURVEY**

Source: WDG Employer Survey

Occupation	# Needed in One Year	% of Total
Applicants willing to work the second shift	185	19.8%
Construction trades, general	82	8.8%
Clerical workers, entry-level	73	7.8%
Bench assembly workers	71	7.6%

**TABLE 39, *continued***  
**OCCUPATIONS PROJECTED TO BE IN DEMAND IN ONE YEAR BY SUB-REGIONAL  
 EMPLOYERS RESPONDING TO THE WDG SURVEY**

Source: WDG Employer Survey

Occupation	# Needed in One Year	% of Total
Unskilled laborers (manufacturing)	63	6.8%
Seasonal workers	38	4.1%
Material handlers	38	4.1%
Machine operators, no setup	30	3.2%
Education: certified teachers/administrators	27	2.9%
Technicians (manufacturing, process, overhaul, and maintenance), entry-level	26	2.8%
New or emerging jobs (list)	26	2.8%
Education: teaching assistants, other non-certified personnel	23	2.5%
Health services: professional (e.g., Dr, RN)	18	1.9%
Health services: skilled (e.g., LPN, CAN, EMT)	16	1.7%
Maintenance, experienced	15	1.6%
Food service: meal preparation	15	1.6%
Administrative assistants	14	1.5%
Machine operators, with setup	13	1.4%
Construction trades, skilled	13	1.4%
Maintenance mechanics/electricians	12	1.3%
Call center customer service rep. or technicians, inbound, entry-level	11	1.2%
Sales, non-retail	10	1.1%
Clerical workers with advanced computer skills	9	1.0%
Bilingual/multilingual personnel	9	1.0%
Accounting clerks	9	1.0%

# LABOR QUALITY

## West Central Texas Region

1. **Generally, employers in the West Central Texas region are moderately satisfied to mildly dissatisfied with the quality of the workforce.** Overall basic skills and verbal communication skills across the region were given satisfactory scores (a median and average score of 3.0 on a scale where 1=poor and 5=excellent). Team and cooperative skills received a slightly higher rating. However, employers gave slight unsatisfactory ratings to reading comprehension, arithmetic, thinking and judgment, and bilingual/multilingual skills. See Table 40.
2. **Surveyed employers report satisfactory to slightly-above-satisfactory work ethic and productivity.** Work ethic and productivity received median scores of 3.0 and average scores of 3.2 on a scale where 1=poor and 5=excellent. Employers rated the productivity higher in the region compared to other company locations. Employers gave satisfactory-to-good scores on employee willingness to work overtime.
3. **Employee turnover is high across the region; however, absenteeism is not a problem, according to area employers.** Average annual turnover was reported by area employers to be over 10%. Average daily absenteeism was under 10% and not perceived as a problem among employers.

**TABLE 40**  
**LABOR QUALITY RATINGS BY REGIONAL EMPLOYERS**  
**(5=excellent, 1=poor)**

Source: WDG Employer Survey, Summer 2002

Basic Skills of Job Applicants	Average Score	Median Score
Overall basic skills of all applicants	3.0	3.0
Written communication	2.6	3.0
Reading comprehension	2.9	3.0
Arithmetic	2.8	3.0
Thinking and judgment	2.9	3.0
Verbal communication	3.0	3.0
Team & cooperative skills	3.1	3.0
Bilingual or multilingual skills	2.4	2.0
<b>Productivity and Work Ethic</b>		
Work ethic	3.2	3.0
Productivity	3.2	3.0
Productivity compared to other company's sites	3.3	3.0
Willingness to work overtime	3.6	3.0
<b>Employee Turnover and Absenteeism (1=0-5%, 2=6-9%, 3=10-14%, 4=over 15%)</b>		
Average annual turnover rate	2.1	2.0
Average daily absenteeism	1.5	1.0

4. **The computer skills needed by local employers are greater than the skills seen among job applicants.** As shown in Table 41, office employers report that applicant levels of computer skills do not meet the level of skill needed. Employers still gave satisfactory to slightly-above-satisfactory ratings to the basic computer skills seen among job applicants. An exception occurs in advanced computer language and networking skills, where demand and supply are in general equilibrium. The demand for these skills by local employers is low.

**TABLE 41**  
**REGIONAL EMPLOYER RATINGS ON NEEDED AND ACTUAL COMPUTER SKILLS**  
 Source: WDG Employer Survey, Summer 2002

Office Personnel (non-managerial)	1=no skill needed, 5=highest skill needed		1=poor skills, 5=excellent skills	
	Average Needed	Median Needed	Average Seen	Median Seen
Fundamental skills	3.9	4.0	3.4	3.0
Basic keyboard skills	4.0	4.0	3.5	3.0
Using word processing software	3.6	4.0	3.2	3.0
Using spreadsheet software	3.3	3.0	2.8	3.0
Using database software	3.1	3.0	2.6	3.0
Using accounting software	2.9	3.0	2.4	2.0
Accessing and using Internet	3.2	3.0	3.0	3.0
A+ Certification	1.6	1.0	1.5	1.0
C++	1.5	1.0	1.4	1.0
CAD skills	1.5	1.0	1.3	1.0
Cisco Certification	1.3	1.0	1.3	1.0
HTML/web-page development	1.5	1.0	1.3	1.0
JAVA	1.3	1.0	1.3	1.0
Microsoft Certifications	1.6	1.0	1.5	1.0
Novell-certified training	1.3	1.0	1.4	1.0
Oracle database	1.3	1.0	1.3	1.0
SQL	1.3	1.0	1.3	1.0
<b>Manufacturing</b>				
Fundamental skills	2.3	2.0	1.9	1.5
Basic keyboard skills	2.1	2.0	1.8	1.0
<b>Distribution</b>				
Fundamental skills	2.6	3.0	2.2	2.0
Basic keyboard skills	2.4	2.0	2.1	2.0

5. **Despite the high ratings given to the quality of graduates from local post-secondary institutions, employers report minimal interaction with these institutions for general or customized training programs.** Surveyed employers reported that the overall quality of students from local educational institutions is satisfactory to very good. Abilene Christian University and Hardin-Simmons University received the highest rankings. See Table 42.
- While employers are generally satisfied with the quality of local training institutions, they do see a need for improvements in some areas. See Exhibit C-8 for additional comments.
    - **High Schools:** Basic reading, writing, and math, work ethics, job preparedness, computer skills, communication, customer service, technical education.
    - **Technical schools, two-year community colleges:** metal fabrication, automotive services, computer skills, graphic design, life skills management, work ethic, technical writing.
    - **Universities and four-year colleges:** more mentoring and internships, engineering, graphic design, leadership, business management, better “people skills,” industrial certification programs.

**TABLE 42**  
**REGIONAL EMPLOYER UTILIZATION AND RATINGS ON TRAINING INSTITUTIONS**  
 Source: WDG Employer Survey, Summer 2002

Institution	Employer Utilization (1=never, 5=frequently)		Quality of Grads (1=poor, 5=excellent)	
	Average Score	Median Score	Average Score	Median Score
Area High Schools	2.6	3.0	3.5	3.0
American Commercial College - Abilene	1.3	1.0	2.9	3.0
American Commercial College - San Angelo	1.1	1.0	3.0	3.0
Cisco Junior College	2.4	2.0	3.4	3.0
Central Texas Commercial College	1.5	1.0	3.2	3.0
Texas State Technical College	2.9	3.0	3.7	4.0
Western Texas College	1.9	1.0	3.6	3.0
Abilene Christian University	2.4	2.0	4.1	4.0
Angelo State University	1.8	2.0	3.7	4.0
Hardin-Simmons University	2.2	2.0	4.1	4.0
Howard Payne University	1.7	1.0	3.5	4.0
McMurray University	2.1	2.0	3.9	4.0
Ranger College	1.7	1.0	3.4	3.0
Tarleton State University	1.9	1.0	3.9	4.0
Private Vendors	3.0	3.0	3.5	3.0

## Abilene Sub-region

1. **Like the region, employers in the Abilene sub-region are moderately satisfied to mildly dissatisfied with the quality of the local labor force.** Overall basic skills, verbal communication skills, and team and cooperative skills were given satisfactory scores; however, reading comprehension, arithmetic, thinking and judgment, and bilingual/multilingual skills were rated as slightly unsatisfactory. See Table 43.
  - Employers gave satisfactory to above-satisfactory ratings to employee work ethic and productivity. Both received a median score of 3.0 and an average score of 3.3 (on a scale where 1=poor and 5=excellent). Employee productivity compared to other company sites was high, as was employee willingness to work overtime.
  - Average annual turnover was reported by area employers to be over 10%. Average daily absenteeism was under 10% and not perceived as a problem among employers.

**TABLE 43**  
**LABOR QUALITY RATINGS BY ABILENE SUB-REGIONAL EMPLOYERS**  
 (5=excellent, 1=poor)

Source: WDG Employer Survey, Summer 2002

Basic Skills of Job Applicants	Average Score	Median Score
Overall basic skills of all applicants	3.0	3.0
Written communication	2.6	3.0
Reading comprehension	2.9	3.0
Arithmetic	2.9	3.0
Thinking and judgment	2.9	3.0
Verbal communication	3.0	3.0
Team & cooperative skills	3.1	3.0
Bilingual or multilingual skills	2.4	2.0
<b>Productivity and Work Ethic</b>		
Work ethic	3.3	3.0
Productivity	3.3	3.0

**TABLE 43, continued**  
**LABOR QUALITY RATINGS BY ABILENE SUB-REGIONAL EMPLOYERS**  
**(5=excellent, 1=poor)**

Source: WDG Employer Survey, Summer 2002

<b>Basic Skills of Job Applicants</b>	<b>Average Score</b>	<b>Median Score</b>
Productivity compared to other company's sites	3.3	3.0
Willingness to work overtime	3.5	3.0
<b>Employee Turnover and Absenteeism (1=0-5%, 2=6-9%, 3=10-14%, 4=over 15%)</b>		
Average annual turnover rate	2.1	1.4
Average daily absenteeism	1.4	1.0

2. **Computer skills in the Abilene sub-region were rated considerably higher than in the region as a whole, and closely matched the demand for these skills by employers.** As seen in Table 44, employers in the Abilene sub-region gave very good ratings to the overall fundamental computer skills seen among job applicants. Spreadsheet, database, and accounting software skills received slightly unsatisfactory ratings. Advanced computer language skills were given unsatisfactory ratings; however, the demand for these skills is low.

**TABLE 44**  
**ABILENE SUB-REGIONAL EMPLOYER RATINGS ON NEEDED AND ACTUAL COMPUTER SKILLS**

Source: WDG Employer Survey, Summer 2002

	<b>1=no skill needed, 5=highest skill needed</b>		<b>1=poor skills, 5=excellent skills</b>	
	<b>Average Needed</b>	<b>Median Needed</b>	<b>Average Seen</b>	<b>Median Seen</b>
<b>Office Personnel (non-managerial)</b>				
Fundamental skills	4.0	4.0	3.5	4.0
Basic keyboard skills	4.0	4.0	3.5	4.0
Using word processing software	3.7	4.0	3.3	3.0
Using spreadsheet software	3.4	4.0	2.9	3.0
Using database software	3.1	3.0	2.7	3.0
Using accounting software	2.7	3.0	2.4	2.0
Accessing and using Internet	3.2	3.0	3.0	3.0
A+ Certification	1.5	1.0	1.4	1.0
C++	1.5	1.0	1.4	1.0
CAD skills	1.5	1.0	1.4	1.0
Cisco Certification	1.3	1.0	1.3	1.0
HTML/web-page development	1.4	1.0	1.4	1.0
JAVA	1.3	1.0	1.4	1.0
Microsoft Certifications	1.6	1.0	1.5	1.0
Novell-certified training	1.3	1.0	1.4	1.0
Oracle database	1.3	1.0	1.3	1.0
SQL	1.3	1.0	1.3	1.0
<b>Manufacturing</b>				
Fundamental skills	2.2	2.0	1.9	1.0
Basic keyboard skills	2.0	2.0	1.8	1.0
<b>Distribution</b>				
Fundamental skills	2.5	3.0	2.2	2.0
Basic keyboard skills	2.3	2.0	2.2	2.0

3. **Employers in the Abilene sub-region report minimal experience working with area training institutions for general and customized training, but give high ratings to the quality of graduates.** As seen in Table 45, Abilene sub-region employers rely most frequently on private vendors for their training needs. Employers responding to the survey are pleased with the quality of graduates, and give the highest ratings to graduates from Abilene Christian University and Hardin-Simmons University.

**TABLE 45**  
**ABILENE SUB-REGION EMPLOYER UTILIZATION AND RATINGS ON TRAINING INSTITUTIONS**  
 Source: WDG Employer Survey, Summer 2002

Institution	Employer Utilization (1=never, 5=frequently)		Quality of Grads (1=poor, 5=excellent)	
	Average Score	Median Score	Average Score	Median Score
Area High Schools	2.4	2.0	3.5	3.0
American Commercial College - Abilene	1.4	1.0	2.8	3.0
American Commercial College - San Angelo	1.1	1.0	2.9	3.0
Cisco Junior College	2.5	2.0	3.3	3.0
Central TX Commercial College	1.1	1.0	2.9	3.0
TX State Technical College	2.8	3.0	3.6	4.0
Western TX College	1.5	1.0	3.4	3.0
Abilene Christian University	2.6	3.0	4.1	4.0
Angelo State University	1.7	1.0	3.6	4.0
Hardin-Simmons University	2.4	2.0	4.1	4.0
Howard Payne University	1.4	1.0	3.5	4.0
McMurray University	2.3	2.0	3.9	4.0
Ranger College	1.4	1.0	3.3	3.0
Tarleton State University	1.7	1.0	3.7	4.0
Private Vendors	3.0	3.0	3.3	3.0

## West Central Texas Sub-regions, Excluding the Abilene Sub-region

1. **Relative to the region as a whole and the Abilene sub-region, other sub-region employers are dissatisfied with the quality of the labor force.** As seen in Table 46, sub-region employers, excluding the Abilene sub-region, gave slightly unsatisfactory ratings to all labor quality measures except for team and cooperative skills.
  - Employers gave satisfactory to above-satisfactory ratings to employee work ethic and productivity. Both received a median score of 3.0 and slightly higher average scores (on a scale where 1=poor and 5=excellent). Employee productivity compared to other company sites was high, as was employee willingness to work overtime.
  - Average annual turnover was reported by area employers to be approximately 10%, which is lower than the regional or Abilene sub-region averages. Average daily absenteeism was under 10% and not perceived as a problem among employers.

**TABLE 46**  
**LABOR QUALITY RATINGS BY SUB-REGIONAL EMPLOYERS,**  
**EXCLUDING THE ABILENE SUB-REGION**  
**(5=excellent, 1=poor)**

Source: WDG Employer Survey, Summer 2002

<b>Basic Skills of Job Applicants</b>	<b>Average Score</b>	<b>Median Score</b>
Overall basic skills of all applicants	2.9	3.0
Written communication	2.7	3.0
Reading comprehension	2.8	3.0
Arithmetic	2.7	3.0
Thinking and judgment	2.9	3.0
Verbal communication	2.9	3.0
Team & cooperative skills	3.2	3.0
Bilingual or multilingual skills	2.3	2.0
<b>Productivity and Work Ethic</b>		
Work ethic	3.0	3.0
Productivity	3.1	3.0
Productivity compared to other company's sites	3.3	3.0
Willingness to work overtime	3.6	3.0
<b>Employee Turnover and Absenteeism (1=0-5%, 2=6-9%, 3=10-14%, 4=over 15%)</b>		
Average annual turnover rate	2.0	2.0
Average daily absenteeism	1.6	1.0

2. **Within the sub-regions, employers report that the computer skills of applicants do not match what is required by the employers.** Although basic computer skills—including fundamental skills, basic keyboard skills, and word processing skills—received above satisfactory ratings, they did not meet employer demand for these skills. An exception occurs in advanced computer language and networking skills, where demand and supply are in general equilibrium. The demand for these skills by local employers is low.

**TABLE 47**  
**SUB-REGION EMPLOYER (EXCLUDING ABILENE SUB-REGION) RATINGS**  
**ON NEEDED AND ACTUAL COMPUTER SKILLS**

Source: WDG Employer Survey, Summer 2002

<b>Office Personnel (non-managerial)</b>	<b>1=no skill needed, 5=highest skill needed</b>		<b>1=poor skills, 5=excellent skills</b>	
	<b>Average Needed</b>	<b>Median Needed</b>	<b>Average Seen</b>	<b>Median Seen</b>
Fundamental skills	3.9	4.0	3.3	3.0
Basic keyboard skills	4.0	4.0	3.4	3.0
Using word processing software	3.7	4.0	3.1	3.0
Using spreadsheet software	3.2	3.0	2.7	2.0
Using database software	3.1	3.0	2.4	2.0
Using accounting software	3.2	3.0	2.6	2.0
Accessing and using Internet	3.3	3.0	2.9	3.0
A+ Certification	1.6	1.0	1.4	1.0
C++	1.4	1.0	1.3	1.0
CAD skills	1.6	1.0	1.3	1.0
Cisco Certification	1.3	1.0	1.2	1.0
HTML/web-page development	1.5	1.0	1.3	1.0
JAVA	1.3	1.0	1.2	1.0

**TABLE 47, continued**  
**SUB-REGION EMPLOYER (EXCLUDING ABILENE SUB-REGION) RATINGS**  
**ON NEEDED AND ACTUAL COMPUTER SKILLS**

Source: WDG Employer Survey, Summer 2002

Office Personnel (non-managerial), <i>continued</i>	1=no skill needed, 5=highest skill needed		1=poor skills, 5=excellent skills	
	Average Needed	Median Needed	Average Seen	Median Seen
Microsoft Certifications	1.6	1.0	1.5	1.0
Novell-certified training	1.4	1.0	1.3	1.0
Oracle database	1.2	1.0	1.3	1.0
SQL	1.2	1.0	1.3	1.0
<b>Manufacturing</b>				
Fundamental skills	2.4	2.5	1.9	2.0
Basic keyboard skills	2.3	2.0	1.9	2.0
<b>Distribution</b>				
Fundamental skills	2.7	3.0	2.1	2.0
Basic keyboard skills	2.6	3.0	2.1	2.0

3. **Table 48 shows employer utilization of regional training institutions and the quality of graduates from these institutions.** Employers have very limited experience working with regional training institutions for general and customized training. The most commonly used training provider is reported to be area high schools. However, employers give good to very-good ratings to graduates from local training institutions. The institutions receiving the highest ratings include Hardin-Simmons University, Tarleton State University, and Abilene Christian University.

**TABLE 48**  
**SUB-REGION EMPLOYER (EXCLUDING ABILENE SUB-REGION) UTILIZATION**  
**AND RATINGS ON TRAINING INSTITUTIONS**

Source: WDG Employer Survey, Summer 2002

Institution	Employer Utilization (1=never, 5=frequently)		Quality of Grads (1=poor, 5=excellent)	
	Average Score	Median Score	Average Score	Median Score
Area High Schools	2.9	3.0	3.4	3.0
American Commercial College - Abilene	1.1	1.0	3.6	4.0
American Commercial College - San Angelo	1.1	1.0	3.8	4.0
Cisco Junior College	2.2	3.0	3.6	4.0
Central TX Commercial College	1.9	1.5	3.5	4.0
TX State Technical College	3.1	3.0	4.0	4.0
Western TX College	2.4	2.0	3.9	4.0
Abilene Christian University	1.9	2.0	4.1	4.0
Angelo State University	1.8	2.0	4.0	4.0
Hardin-Simmons University	1.7	1.0	4.2	4.0
Howard Payne University	2.2	2.0	3.5	4.0
McMurray University	1.7	1.0	4.0	4.0
Ranger College	2.0	2.0	3.5	3.5
Tarleton State University	2.2	2.0	4.1	4.0
Private Vendors	2.9	3.0	3.7	4.0

# LABOR COSTS

## West Central Texas Region

1. **Exhibit B-8 in the Appendix shows average annual employee earnings by industry for the sub-regions, the region, Texas, and the United States.** Overall employee earnings vary among the sub-regions but are significantly lower than state or national averages. In general, total employee earnings are 65% of the U.S. average and 66% of the state average.
  - The lowest overall employee earnings are found in the Haskell sub-region. Earnings in the Haskell sub-region are 55% of the state average and 84% of the regional average.
  - The Snyder sub-region has the highest reported average annual earnings. Overall employee earnings in this sub-region are 6% higher than the regional average and 70% of the state average.
2. **Table 49 shows salary information for the region as reported by local employers for which there was sufficient data.** Salaries are low for entry-level and experienced workers compared to WDG experiences across the country.

**TABLE 49**  
**ANNUAL EARNINGS OF SURVEYED EMPLOYERS**  
 Source: WDG Employer Survey, Summer 2002

Occupation	Responses	Average Annual Wage	Median Annual Wage
Accounting clerks	55	\$20,105	\$18,000
Administrative assistants	50	\$21,459	\$20,800
Clerical workers: entry-level	47	\$15,406	\$14,706
Clerical workers: advanced computer skills	39	\$18,343	\$17,680
Professionals/management	33	\$47,132	\$36,000
Applicants willing to work 2nd shift	32	\$20,479	\$17,840
Food service: meal prep	31	\$15,481	\$14,560
Maintenance: experienced	25	\$22,481	\$22,000
Management: experienced	24	\$37,241	\$35,180
Health services: professional	23	\$61,726	\$41,600
Maintenance mechanics/electricians	22	\$25,956	\$22,983
Truck drivers	22	\$20,784	\$17,680
Bilingual/multilingual personnel	19	\$20,316	\$15,600
Computer network administration	18	\$29,538	\$30,080
Education: certified teachers/admin	18	\$36,269	\$32,680
Hospitality: housekeeping, other	18	\$13,220	\$12,480
Applicants willing to work 3rd shift	18	\$20,082	\$16,820
Unskilled laborers: except mfg	18	\$14,622	\$15,300
Health services: skilled	17	\$25,916	\$26,000
Education: teaching assts, other non-certified	15	\$15,079	\$13,000
Food service: wait staff	15	\$11,576	\$12,438
Construction trades: general	14	\$20,255	\$18,023
Technicians: mfg, process, etc - experienced	14	\$23,134	\$20,800
Sales: non-retail	13	\$25,586	\$25,000
Call center CSR/technicians Inbound: entry-level	13	\$16,719	\$14,560
Technicians: mfg, process, etc - entry-level	13	\$20,485	\$17,950
Construction trades: skilled	12	\$24,521	\$23,920
Material handlers	12	\$22,098	\$17,800
Computer operators	11	\$21,245	\$21,840
Computer/office technical support specialist	11	\$19,686	\$18,720

**TABLE 49, continued**  
**ANNUAL EARNINGS OF SURVEYED EMPLOYERS**  
 Source: WDG Employer Survey, Summer 2002

Occupation	Responses	Average Annual Wage	Median Annual Wage
Machine operators: no set-up	11	\$22,298	\$20,800
Management trainees	11	\$24,446	\$21,965
Seasonal workers	11	\$15,016	\$12,480
Call center CSR/technicians inbound: experienced	11	\$18,296	\$14,768
Heavy equipment operators	10	\$24,271	\$22,880
Machine operators: with set-up	10	\$21,729	\$17,607
Sales: retail	10	\$28,676	\$22,360
Computer programmers	9	\$37,165	\$35,000
Engineers: general, entry-level	9	\$33,728	\$35,000
Health services: technicians	9	\$24,143	\$20,800
Engineers: electrical/electronic	8	\$42,400	\$44,000
Bench assembly workers	7	\$13,970	\$13,520
Engineers: mechanical	6	\$43,000	\$43,000
Engineers: chemical	5	\$42,800	\$43,000
Machinists	5	\$23,242	\$22,880
New or emerging jobs	5	\$23,504	\$18,720

3. **Benefit programs offered by regional employers are modest.**

- 81% offer company-paid health insurance (average percent of premium paid by employers: 84.5%)
- 65% offer company-paid life insurance (average percent of premium paid by employers: 94.7%)
- 35% of employers have a pension plan to which the employee contributes.
- 62% have 401(k) plans.
- 48% have company-paid long-term-disability insurance (average percent of premium paid by employers: 84.6%)
- 42% have company-paid short-term-disability insurance (average percent of premium paid by employers: 87.6%)
- 35% offer company-paid dental insurance (average percent of premium paid: 80.9%)
- 21.3% offer company-paid optical insurance (average percent of premium paid: 77.7%)

## Abilene Sub-region

1. Table 50 shows salary information for the Abilene sub-region as reported by local employers for which there was sufficient data.

**TABLE 50**  
**ANNUAL EARNINGS OF SURVEYED EMPLOYERS IN THE ABILENE SUB-REGION**  
 Source: WDG Employer Survey, Summer 2002

Occupation	Responses	Average Annual Wage	Median Annual Wage
Accounting clerks	33	\$20,272	\$18,000
Administrative assistants	27	\$21,202	\$20,883
Clerical workers, entry-level	23	\$15,833	\$15,300
Clerical workers with advanced computer skills	20	\$18,291	\$17,680
Professionals/management	16	\$50,803	\$37,000

**TABLE 50, continued**  
**ANNUAL EARNINGS OF SURVEYED EMPLOYERS IN THE ABILENE SUB-REGION**  
Source: WDG Employer Survey, Summer 2002

Occupation	Responses	Average Annual Wage	Median Annual Wage
Applicants willing to work the second shift	13	\$20,131	\$19,760
Management, experienced	13	\$40,756	\$39,000
Computer network administrators	12	\$31,970	\$31,200
Truck drivers	11	\$19,508	\$17,590
Maintenance mechanics/electricians	9	\$24,297	\$20,966
Technicians (manufacturing, process, overhaul, and maintenance), experienced	9	\$25,124	\$25,000
Call center customer service rep. or technicians, inbound, entry-level	8	\$17,414	\$15,600
Computer operators	8	\$22,723	\$23,420
Food service: meal preparation	8	\$16,186	\$15,030
Health services: professional (Dr, RN)	8	\$71,054	\$41,829
Hospitality: housekeeping, other service oriented	8	\$13,861	\$13,728
Sales, non-retail	8	\$26,100	\$27,500
Applicants willing to work the third shift	7	\$18,271	\$17,000
Bilingual/multilingual personnel	7	\$21,203	\$16,640
Call center customer service rep. or technicians, inbound, experienced	7	\$19,103	\$16,640
Maintenance, experienced	7	\$20,885	\$22,000
Technicians (manufacturing, process, overhaul, and maintenance), entry-level	7	\$21,322	\$17,950
Unskilled laborers (except manufacturing)	7	\$14,467	\$14,780
Computer programmers	6	\$36,581	\$34,140
Computer/office technical support specialists	6	\$20,853	\$18,720
Construction trades, general	6	\$22,303	\$20,800
Education: teaching assistants, other non-certified personnel	6	\$16,603	\$13,520
Material handlers	6	\$21,211	\$15,350
Construction trades, skilled	5	\$27,147	\$27,040
Engineers, general, entry-level	5	\$27,900	\$27,900
Health services: skilled (e.g., LPN, CAN, EMT)	5	\$27,644	\$28,226
Health services: technicians (e.g., Lab, etc.)	5	\$21,591	\$20,280
Sales, retail	5	\$32,040	\$23,920

2. **Benefit programs offered by Abilene sub-region employers are modest but, overall, are slightly better than the region as a whole.**

- 85% offer company-paid health insurance (average percent of premium paid by employers: 86.2%)
- 67% offer company-paid life insurance (average percent of premium paid by employers: 94.9%)
- 34% of employers have a pension plan to which the employer contributes.
- 69% have 401(k) plans.
- 52% have company-paid long-term-disability insurance (average percent of premium paid by employers: 88.6%)
- 41% have company-paid short-term-disability insurance (average percent of premium paid by employers: 95.9%)
- 34% offer company-paid dental insurance (average percent of premium paid: 80.7%)
- 17.5% offer company-paid optical insurance (average percent of premium paid: 80.6%)

3. **Table 51 shows median earnings in the Abilene MSA relative to median earnings in the Dallas/Ft. Worth MSA for representative occupations.** There is a considerable cost savings in the Abilene MSA relative to the Dallas/Ft. Worth MSA.

**TABLE 51**  
**MEDIAN EARNINGS IN THE ABILENE METRO AREA AND THE DALLAS/FT. WORTH METRO AREA FOR SELECT REPRESENTATIVE OCCUPATIONS**

Source: Salary.com

Occupation	Abilene MSA	Dallas/ Ft. Worth MSA
Accounting clerk	\$23,376	\$26,282
Administrative assistant	\$31,915	\$35,882
Call center representative, inbound	\$21,550	\$24,228
Electronics technician	\$30,406	\$34,186
Machinist	\$26,336	\$29,610
Tool & die maker	\$31,531	\$35,451
New accounts representative	\$19,959	\$22,441
Database analyst	\$40,846	\$45,924
Engineer I	\$46,213	\$51,958
Welder	\$25,311	\$28,458

## West Central Texas Sub-regions, Excluding the Abilene Sub-region

1. **Table 52 shows salary information for the region as reported by local employers for which there was sufficient data.** Salaries are low for entry-level and experienced workers, compared to WDG experiences.

**TABLE 52**  
**ANNUAL EARNINGS OF SURVEYED EMPLOYERS IN THE WEST CENTRAL TEXAS SUB-REGIONS, EXCLUDING THE ABILENE SUB-REGION**

Source: WDG Employer Survey, Summer 2002

Occupation	Responses	Average Annual Wage	Median Annual Wage
Accounting clerks	16	\$19,813	\$18,200
Applicants willing to work the second shift	12	\$20,750	\$17,160
Clerical workers, entry-level	12	\$14,777	\$14,560
Food service: meal preparation	11	\$14,730	\$13,208
Administrative assistants	10	\$22,059	\$20,000
Maintenance, experienced	10	\$23,736	\$21,840
Clerical workers with advanced computer skills	8	\$18,461	\$17,212
Construction trades, general	7	\$16,569	\$16,640
Maintenance mechanics/electricians	7	\$27,615	\$30,000
Bilingual/multilingual personnel	6	\$19,096	\$14,853
Computer/office technical support specialists	6	\$17,644	\$16,548
Construction trades, skilled	6	\$20,846	\$20,800
Education: certified teachers/administrators	6	\$30,365	\$28,000
Engineers: general, entry-level	6	\$35,393	\$39,000
Health services: professional (e.g., Dr, RN)	6	\$51,549	\$37,440
Management, experienced	6	\$32,320	\$30,607
Computer network administrators	5	\$23,216	\$20,800
Computer operators	5	\$17,304	\$16,432

**TABLE 52, *continued***  
**ANNUAL EARNINGS OF SURVEYED EMPLOYERS IN THE**  
**WEST CENTRAL TEXAS SUB-REGIONS, EXCLUDING THE ABILENE SUB-REGION**  
 Source: WDG Employer Survey, Summer 2002

Occupation	Responses	Average Annual Wage	Median Annual Wage
Health services: skilled (e.g. LPN, CAN, EMT)	5	\$24,380	\$24,960
Management trainees	5	\$24,883	\$21,965
Unskilled laborers (except manufacturing)	5	\$14,815	\$15,600

2. **Benefit programs offered by sub-regional employers excluding the Abilene sub-region are modest**

- 75% offer company-paid health insurance (average percent of premium paid by employers: 81.3%)
- 59% offer company-paid life insurance (average percent of premium paid by employers: 94.9%)
- 35% of employers have a pension plan to which the employer contributes.
- 49% have 401(k) plans.
- 52% have company-paid long-term-disability insurance (average percent of premium paid by employers: 88.6%)
- 42% have company-paid short-term-disability insurance (average percent of premium paid by employers: 95.9%)
- 35% offer company-paid dental insurance (average percent of premium paid: 82.3%)
- 25% offer company-paid optical insurance (average percent of premium paid: 74%)

## OPERATING ENVIRONMENT

1. **Texas Workers' Compensation and labor legislation are favorable to employers.** A review of existing Texas labor law reveals no current state legislation exceeding federal mandates, as seen in Table 53. Texas is a right-to-work state. There are no statewide restrictions stronger than federal in terms of drug testing, right-to-know, ADA legislation, EEO hiring, sexual harassment, or mandated parental leave legislation. Texas has solid employment-at-will legislation, meaning that an employee is hired at-will, and that employment can be terminated at the will of either the employer or the employee. See Exhibit B-9 in the Appendix.

**TABLE 53**  
**LABOR LEGISLATION IN TEXAS**  
Source: WDG Database

Employment at will? (Yes or No)	Yes
If yes, significant restrictions (from employers standpoint)	No
Restrictions on employee drug testing	No
Telephone monitoring restrictions for regulation of productivity (or customer service)	Yes: One-Party Consent
Plant Closing Law stricter than federal?	No
ADA legislation stricter than federal?	No
Ban on hiring replacement workers during a strike?	No
Striking workers entitled to unemployment insurance?	No
Relatively difficult for an employer to contest and win a Workers' Comp. claim?	No
Relatively difficult for an employer to contest and win an unemployment insurance claim?	No
Right-to-Work law in effect?	Yes
EEO hiring standards more restrictive than federal?	No
Sexual harassment laws more restrictive than federal?	No
Mandated parental leave legislation more generous than federal?	No
Onerous provisions for wrongful discharge	No
Restrictions on applicant testing	No

2. **Table 54 provides Workers' Compensation and unemployment insurance rates for Texas.** Overall, these rates are competitive with other states. See Exhibit B-9.

**TABLE 54**  
**WORKERS' COMPENSATION AND UNEMPLOYMENT INSURANCE IN TEXAS**  
Source: WDG Database

<b>Unemployment Insurance</b>	<b>Texas</b>
Unemployment insurance rate (avg. existing employers) (2000 estimates by DOL)	1.3%
Unemployment insurance rate (for new employers-- 8-01 ADP)	2.7%
Unemployment insurance taxable base (2001)	\$9,000
Unemployment insurance maximum weekly benefit amount (8-01 ADP)	\$294
<b>Workers' Compensation</b>	
Maximum weekly benefit (1/2001)	\$533
Blended rate per \$100 payroll-- all mfg. (1999)	\$4.69
Rate for clericals code 8810	\$0.52
Waiting period (days)	7
Automatic cost of living increase for total disability?	No
Employee allowed to choose any physician?	No
Physician list provided by	State

**TABLE 54, *continued***  
**WORKERS' COMPENSATION AND UNEMPLOYMENT INSURANCE IN TEXAS**  
 Source: WDG Database

<b>Workers' Compensation, <i>continued</i></b>	<b>Texas</b>
Mental stress generally allowed as a compensable injury as a result of cumulative trauma?	No
Carpal tunnel generally allowed as a compensable injury as a result of cumulative trauma?	Yes
Back generally allowed as a compensable injury as a result of cumulative trauma?	Yes
Neck generally allowed as a compensable injury as a result of cumulative trauma?	Yes
Cardiovascular generally allowed as a compensable injury as a result of cumulative trauma?	No
Second medical opinion allowed from physician chosen by employee, but paid for by employer.	No
Coverage for permanent partial	Yes

3. **Several labor-related incentives are offered by the State of Texas.** Exhibit B-10 shows the incentives available in Texas, including pre-employment training programs, franchise tax refunds, and enterprise zone programs.
4. **The region has a low union presence.** Since 1989, there have been 19 union certification elections, of which the unions won 11. See Exhibit B-11 in the Appendix for a complete list of elections.
5. **There are several large employers in the region, but the majority of firms are small.** A list of major employers is provided in Exhibit B-12. Some of the region's largest employers include Dyess Air Force Base, Hendrick Health Systems, Blue Cross Blue Shield of Texas, and the Abilene State School.
6. **The local business climate is generally perceived to be satisfactory by local employers, although some factors received less than satisfactory ratings.** Generally, they were satisfied with the state and local government. There were some employers, however, that provided low ratings on the fairness of Workers' Compensation enforcement and costs, unemployment insurance costs and enforcement, ease of obtaining permitting for facility expansion, property tax rates, and incentives to existing industry. See Exhibit C-1.

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# APPENDIX A

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# APPENDIX B

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# APPENDIX C

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# APPENDIX D

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# APPENDIX E