



PULASKI COUNTY AND FORT LEONARD WOOD AREA LABOR ASSET REPORT

Prepared for:

Pulaski County Growth Alliance

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**PULASKI COUNTY AND FORT LEONARD WOOD AREA
LABOR ASSET REPORT**

Contents

	<u>Page</u>
I. INTRODUCTION	1
II. SUMMARY OF LABOR ASSETS	4
III. LABOR FORCE OVERVIEW	6
IV. CIVILIAN JOB SEEKERS	11
V. MILITARY RETIREE LABOR POOL	16
VI. MILITARY SPOUSE LABOR POOL	26
VII. EDUCATION AND TRAINING	31
VIII. LABOR COST	35
IX. QUALITY OF LIFE AND COST OF LIVING	40
X. EMPLOYER TESTIMONIALS	43

I. INTRODUCTION

No single factor is more important in business investment decision-making than labor. This is reflected in widely published annual surveys of U.S. corporate leaders and insights of economic development professionals and others who seek to attract, retain, or help businesses expand. In many locations, labor market attributes are widely known and readily documented. These locations can demonstrate capabilities that otherwise would only be conveyed qualitatively, thus making for a compelling marketing advantage.

On the other end of the spectrum are locations that have debilitating labor market deficiencies, namely skill shortages, and try to mask this via flowery marketing materials containing little content or fact. But these limitations rarely escape discerning business decision-makers. Those who overlook these deficiencies early on will undoubtedly suffer from this oversight once operating in the community.

Pulaski County and the Fort Leonard Wood area are exceptions that do not fit either description. The County and the other six counties comprising the Fort Leonard Wood area (Camden, Laclede, Maries, Miller, Phelps and Texas counties) have a large reserve of low, moderate and highly skilled and trainable individuals but, thus far, have had difficulty proving it. Businesses relying on off-the-shelf U.S. Census and other government data fail to learn of Pulaski County and the Fort Leonard Wood area's true labor advantages. In fact, these businesses may erroneously see the location as ill-prepared to address the needs of discerning company site seekers.

The Fort Leonard Wood area is a treasure trove of trained and trainable individuals with boundless potential. Traditionally high unemployment, recent facility closures, quality academic institutions and the students they produce, and especially, the talent emerging annually from Fort Leonard Wood personnel combine to make for a solid labor base uncommon in today's rural America.

The scores of individuals that cycle through Fort Leonard Wood each year alone are believed to receive some \$20,000 to \$30,000 of advanced military training in areas directly transferable to the private sector. Here the term "retirement" is an obvious misnomer. Retirees from the installation may be leaving military service, but they are just embarking on their civilian careers. They are physically fit, well educated and yearning to apply their skills in productive ways. And thanks to their military service, their health insurance and other benefits are covered, thereby making them a bargain to private employers who would otherwise bear these costs.

A sizable number of Fort Leonard Wood personnel are married with skilled and educated trailing spouses interested in working. These valuable individuals are not readily apparent to the untrained eye. In combination, Fort Leonard Wood military retirees, military spouses and the available non-military labor force represent a surprisingly marketable skill base in this misunderstood, rural region.

With funding largely from the U.S. Department of Defense Office of Economic Adjustment, the Prager Team -- Prager Company and Katona and Associates -- was retained to help tell the labor story of Pulaski County and the Fort Leonard Wood area. It is important to state that this is *not* a traditional labor market analysis (i.e. one which equally assesses the competitive strengths and weaknesses of a location's labor force). This is a Labor Asset Report designed to help those committed to economic development market Pulaski County and the surrounding area to prospective investors. In crafting this document, the Prager Team took data and findings gleaned from focused research and packaged it specifically for promotion of Pulaski County and the Fort Leonard Wood area.

Considerable primary research and data gathering went into the development of the Labor Asset Report. Initially, published sources were tapped, including many from the Federal Government. This data was dissected and then supplemented by the expert team at the Missouri Economic Research & Information Center (MERIC). It was further enhanced by other government workforce providers including the Central Region Workforce Investment Board and the Missouri Career Center. Numerous entities at Fort Leonard Wood, orchestrated by its Public Affairs Office (PAO), provided insights and access to essential yet previously inaccessible data. The PAO also reviewed all Fort Leonard Wood-related data and associated Prager Company statements for accuracy. The Waynesville-St. Robert Chamber of Commerce, with assistance from Fort Leonard Wood, refined, disseminated and collected hundreds of surveys from military retirees and spouses. In addition to data gathering and analysis, the Prager Team interviewed dozens of area businesses, workforce service providers, education experts (K-12, technical school and university), State-level economic development personnel and others. This project was coordinated and supported via the Meramec Regional Planning Commission (MRPC), working conscientiously on behalf of the counties within its service area.

The surveys themselves provide the backbone of this report. In that reliable information on Fort Leonard Wood military retirees and spouses of active military are hard to come by, these surveys provide a rare glimpse of the skills and interests of these existing and potential workers. According to the Fort Leonard Wood PAO, approximately 1,300 military retirees received the survey. All told, 328 military retirees responded, thus registering a response rate of roughly 23%. It is important to note that the vast majority of active and retired military at Fort Leonard Wood are U.S. Army. PAO sources estimate that only about 10% of the military population is other services. So while survey results label respondents generically as military retirees, the vast majority are U.S. Army. Approximately 1,700 military spouses received the Spouse Survey (again according to Fort Leonard Wood PAO). Of these, 174 responded; a response rate of just over 10%.

Rather than provide reams of survey results and data in a traditional study format, the Labor Asset Report is structured in conversation style. It poses the sorts of questions asked by business investors and others seeking a new facility location, then answers them in a factual, marketable fashion. By design, the Labor Asset Report emphasizes the previously under-represented labor assets emanating from Fort Leonard Wood, namely the area's mass of talented military retirees and spouses interested in new jobs or those that better leverage

their talents and training. First and foremost, the Labor Asset Report is a tool to help the eventual staff of the Pulaski County Growth Alliance market Pulaski County to desirable business investors. Secondly, the report provides data and information to help the economic development professionals of Laclede, Phelps and other nearby counties promote their jurisdictions as part of a unified region.

The Labor Asset Report is loaded with the sorts of succinctly stated labor assets and documented data prospective investors seek. It includes several testimonials from companies (who could, perhaps, be cultivated as marketing ambassadors) well-versed in the area and quite knowledgeable of its workforce conditions. Provided separately are the unabridged results of the Military Retiree and Spouse Surveys, including the names, contact information and qualifications of hundreds of individuals interested in landing jobs or improving their existing employment situation. This database of highly qualified job seekers should be utilized whenever opportunities present themselves, whether to demonstrate labor acumen to prospective business investors or to help employers fill critical jobs.

II. SUMMARY OF LABOR ASSETS

The labor force of the Fort Leonard Wood area (and especially that of Pulaski County) is poorly understood and often mischaracterized. While it is deficient in certain ingredients important to business investors, the area's labor assets are considerable and belie its rural persona. Incomplete data and under-representation of the military-trained, job-ready talent perpetuates the myth that the Fort Leonard Wood area is a "typical" rural region. In reality, it is anything but.

Provided is a summary of labor assets of the Fort Leonard Wood area detailed in this document. Emphasis is placed on the unrealized potential of the many military retirees and active military spouses residing in the Fort Leonard Wood area.

- The seven-county Fort Leonard Wood area labor force is close to 110,000 strong, including roughly 11,000 individuals currently unemployed
- But the number of available workers far exceeds 11,000. Up to three times that number are believed to be actively seeking work to better their situations
- With labor supply eclipsing available jobs, underemployment in the Fort Leonard Wood area is rampant. Businesses and workforce experts hazard that upwards of 40% of those employed are working in jobs not sufficiently leveraging their talents and experience
- Of the job seekers, thousands are skilled in the manufacturing trades and seeking production work, including those with advanced machining and machine tool acumen. Many of these individuals have been recently laid off by area manufacturers struggling in the current economic downturn
- At least 400 individuals are seeking more advanced positions in computer and engineering fields, such as Operations Engineers, Industrial Engineering Technicians, Computer Support Specialists and Systems Analysts
- The three Fort Leonard Wood schools – Engineer, Military Police and Chemical, Biological, Radiological and Nuclear (CBRN) -- graduate more than 50,000 highly trained individuals per year, with an average of \$20,000 to \$30,000 spent to fortify them with sought after skills
- According to Fort Leonard Wood, about 1,300 military retirees reside in the broader 13-county area, two-thirds of which are in Pulaski County and 80% in Laclede, Phelps and Pulaski Counties combined. Based on survey results, more than half are interested in new or better jobs (i.e. may be available). Consequently, the term "retiree" is a misnomer as the average age of these individuals is 51 and most are just beginning their civilian careers
- In addition, about 4,000 spouses of active military reside in the area, of which about 60% or 2,500 are seeking or interested in full-time employment
- Both military retirees and spouses are highly educated, considerably more so than the general population. About 40% of Fort Leonard Wood area military retirees hold undergraduate degrees, and roughly 20% have masters degrees in business and technical fields of interest to prospective employers

- About 21% of military spouses hold undergraduate degrees, and roughly 13% hold masters degrees in Communications, Business Administration, Management, Accounting, Human Resources and other desirable areas
- Albeit trained for military purposes, their skills are directly transferable to, and desired by, the private sector:
 - More than 300 of the area's military retirees are graduates of Fort Leonard Wood's Engineer School, the vast majority with expertise in Engineering Management, Systems Management and Program Integration
 - More than 200 are graduates of the Military Police School, with skills analogous to those required for high ranking positions in Homeland Security, Policing, Investigation and Intelligence
 - Close to 100 military retirees are graduates of the CBRN School with sought after skills in Environmental Management, Environmental Compliance and Testing, and other rapidly advancing fields
- Often overlooked are the many "soft skills" military retirees have that allow them to rise through the corporate ranks often faster than their non-military counterparts. This includes advanced training in leadership, management, quality improvement and communications
- The majority of military retirees have or had Secret or Top Secret military clearance in great demand by military contractors. In most cases, this clearance may need to be reactivated
- The Fort Leonard Wood area has a plethora of higher educational and training institutions. Its centerpiece is the Missouri University of Science and Technology, one of the nation's top rated research and engineering schools. Fewer than 1% of the more than 1,000 annual graduates remain in the Fort Leonard Wood area upon graduation, a percentage that (according to school officials) would grow appreciably if local jobs were available
- In addition, technical training schools abound in the area. In Laclede, Phelps and Pulaski Counties alone, three technical training institutions offer a plethora of demand-driven curricula in computer, medical, machining and manufacturing, and engineering-related fields. Desire to enroll in these programs presently dwarfs capacity
- An estimated 20% of high school graduates annually leave the area to find work not available locally
- Wage rates in the Fort Leonard Wood area, not low by rural standards, never-the-less provide a 10% to 20% savings over Missouri's more urbanized areas
- And hiring military retirees and spouses adds considerable, often understated savings. These individuals receive full health care and other military benefits. As such, they may not require costly employer-sponsored insurance and coverage which otherwise often exceeds 40% of total employee compensation
- Area companies, particularly those employing retired military, are quick to praise the quality, work ethic, management acumen and overall value of these highly trained individuals

III. LABOR FORCE OVERVIEW

In general, what is the complexion of the Fort Leonard Wood area labor force?

The Fort Leonard Wood area labor force is almost 110,000 and encompasses a seven-county region providing a critical mass of motivated and experienced labor. At the center of this region is the massive 61,000-acre Fort Leonard Wood itself, the region's economic engine and, by far, its largest employer. According to the Missouri Military Preparation and Enhancement Commission, the combined direct and indirect economic impact of Fort Leonard Wood exceeds \$2 billion.

As of November 2008, the U.S. Maneuver Support Center (MANSCEN) and Fort Leonard Wood had a total military population of roughly 20,000 (including about 1,800 officers) and a civilian and other federal worker core of more than 3,500. Furthermore, it is estimated that approximately 1,300 military retirees age 50 or younger and roughly 4,000 military spouses reside in the Fort Leonard Wood area (the broader 13-county region). And more than 50,000 service members from Fort Leonard Wood graduate from training every year.

The critical mass of the area's trained and trainable personnel is far more than meets the eye. According to area employers, Fort Leonard Wood area employees are hard working with deeply rooted, Midwestern values. They are characterized as "dependable," "trustworthy," "loyal to their employers," "ready to work" and "highly trainable."

But the sheer number of available workers, especially in the current down economy, dwarfs the jobs to be had. Consequently, many have given up seeking employment and countless others have taken jobs that fail to fully leverage their talents, experience and education (i.e. the underemployed). Stories abound of local businesses inundated with dozens of resumes for a single job opening – the dentist with one position to fill and 68 applicants; the technical college receiving dozens of resumes for one position with more than 80% qualified; the hundreds of laid off manufacturing workers with decades of experience but no jobs to utilize them; and the educational institutions with more than 50% of graduating technical school students and more than 95% of university students leaving the area because jobs are simply not available.

The Fort Leonard Wood community is family-oriented, with many tied to the land where their families have lived for generations. Yet more and more leave the area each year to find employment, and many who do stay commute up to 50 miles one way for the modest paying jobs that exist. A sizable number eventually return decades later, only to struggle to find work that utilizes their years of honed skills and experience.

The Fort Leonard Wood area is unquestionably a "buyer's market" for labor-intensive employers seeking a constantly replenishing supply of trained and trainable workers.

How has the labor force changed?

From January 2000 to January 2009, Missouri’s labor force grew by 1.8%. During this same time period, the labor force of the seven-county Fort Leonard Wood area climbed by more than 11%. In fact, the labor force of all area counties excluding Maries County grew at a faster pace than the State. Pulaski County experienced the biggest net increase -- 27.1%. Note that, as a military location, Pulaski County and Fort Leonard Wood area populations are known to fluctuate substantially from month to month.

Change in Labor Force (2000 to 2009)			
Area	January 2000	January 2009	Percent Change
Camden County	18,248	21,256	16.5%
Laclede County	16,699	18,012	7.9%
Maries County	4,577	4,645	1.5%
Miller County	12,565	12,997	3.4%
Phelps County	19,816	21,484	8.4%
Pulaski County	14,958	19,015	27.1%
Texas County	10,522	10,907	3.7%
FLW Area*	97,385	108,316	11.2%
Missouri	2,934,549	2,986,742	1.8%

* Camden, Laclede, Maries, Miller, Phelps, Pulaski and Texas Counties

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, 2009. Not seasonally adjusted

With a labor force of almost 110,000, the Fort Leonard Wood area approximates a typical mid-sized city, not a rural region. In 2008, the seven-county area’s unemployment rate was 6.5%, compared to the slightly lower 6.1% in Missouri. The three “core” counties in the region (Laclede, Phelps and Pulaski Counties) averaged an unemployment rate (6.4%) roughly equal to that of the larger region. And the unemployment rate in the Fort Leonard Wood area was higher than the 2008 unemployment rates of all neighboring states, except Illinois.

Employment and Unemployment (2008)				
Area	Unemployment Rate	Absolute Unemployment	Employment	Labor Force
Pulaski County	5.8%	1,099	17,916	19,015
Laclede/Phelps/Pulaski	6.4%	3,774	54,765	58,539
FLW Area*	6.5%	7,137	102,986	110,123
Arkansas	5.2%	70,721	1,304,015	1,372,736
Illinois	7.0%	442,646	6,299,480	6,742,126
Kansas	4.5%	66,925	1,426,607	1,493,532
Missouri	6.1%	185,216	2,834,338	3,019,554
Nebraska	3.4%	33,365	961,766	995,131

* Camden, Laclede, Maries, Miller, Phelps, Pulaski and Texas counties

Source: Bureau of Labor Statistics 2008. Not seasonally adjusted.

But 2008 data fails to reveal the troubling economic picture as of this writing. As a result of the national economic downturn, ever-growing layoffs in the Fort Leonard Wood area have spiked unemployment. The unemployment rate in each Fort Leonard Wood area county increased markedly in the latter half of 2008. By January 2009, no county had unemployment below 7%, and three exceeded 10%. In January 2009, the unemployment rate in five of the seven counties surpassed the State’s rate of 8.7%. Phelps and Pulaski Counties remained the exceptions, at 7.3% and 7.2%, respectively. Missouri’s unemployment rate (8.7%) was higher than all of its contiguous states.

Unemployment Rate (January 2009)				
County	Civilian Labor Force	Employment	Unemployment	Unemployment Rate
Camden County	21,256	18,683	2,573	12.1%
Laclede County	18,012	15,912	2,100	11.7%
Maries County	4,645	4,205	440	9.5%
Miller County	12,997	11,291	1,706	13.1%
Phelps County	21,484	19,914	1,570	7.3%
Pulaski County	19,015	17,644	1,371	7.2%
Texas County	10,907	9,904	1,003	9.2%

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, April 2009. Not seasonally adjusted

Unemployment Rate (January 2009)	
State	Rate
Arkansas	7.3%
Iowa	5.8%
Illinois	8.5%
Kansas	6.4%
Missouri	8.7%
Nebraska	5.1%

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, April 2009. Not seasonally adjusted

To what extent does this translate into underemployment?

As with most locations, no hard data exists to calculate the actual number of underemployed people in the area – those whose skills and experiences are being under-utilized. But anecdotal evidence suggests that underemployment in the Fort Leonard Wood area is extremely high. Interviewed local business owners and human resource personnel state that it would not be unrealistic to peg current rate of underemployment at 40%, if not higher. In January 2009, close to 11,000 individuals in the seven-county study area were listed as unemployed by the Bureau of Labor Statistics. However, in that same month, the Missouri

Career Center received more than 33,000 entries from job seekers. Much of the difference can be attributed to individuals actively seeking work, yet currently employed – in other words, those whose skills and experiences are not being properly utilized, and/or those who are seeking higher paying positions. These figures fail to capture the thousands of military retirees and spouses of military personnel working in jobs “beneath” their skill level. In 2005, during much stronger economic times, a regional survey of 769 individuals performed by the consulting firm Growth Services determined that around 30% of respondents identified themselves as working but possessed the skills, education and experience to qualify for higher paying jobs.

Entries from Active Job Seekers (January 2009)	
County	Job Seeker Entries
Camden County	5,234
Laclede County	8,407
Maries County	985
Miller County	3,150
Phelps County	5,515
Pulaski County	7,248
Texas County	2,493

Source: Missouri Career Center, January 2009

How well educated is the local population?

U.S. Census data shows a region with relatively low educational achievement. But, as with much of the Fort Leonard Wood area’s readily available demographic data, the characteristics and qualifications of the military and retired military population are under-represented. To the untrained eye, businesses will see an area where over 80% of the residents of combined Laclede, Phelps and Pulaski Counties over the age of 25 have a minimum of a High School Degree or equivalent, but one where fewer than 20% have a Bachelor’s Degree or higher. This is rather low by State of Missouri standards and those of most contiguous states, albeit more consistent with rural areas elsewhere.

Educational Attainment (2007)						
Educational Attainment	Laclede/ Phelps/ Pulaski Counties	Missouri	Arkansas	Kansas	Illinois	Nebraska
Graduate or Professional Degree	6.9%	8.6%	6.3%	9.7%	10.8%	8.5%
Bachelor's Degree	10.6%	15.4%	12.4%	18.6%	18.2%	18.7%
Associate's Degree	7.0%	6.2%	5.6%	7.1%	7.2%	8.7%
Some College, No Degree	21.8%	21.1%	20.5%	22.8%	20.2%	22.6%

High School Degree*	36.0%	33.7%	35.9%	30.3%	28.8%	30.8%
9th to 12th Grade, No Diploma	11.4%	10.0%	12.0%	7.2%	8.3%	6.3%
Less than 9th Grade	6.3%	5.1%	7.4%	4.2%	6.5%	4.3%

* Includes equivalency

Source: American Community Survey 3-Year Estimates, 2007

The often hidden reserve of retired military and military spouses is far more educated than the general population. Based on Prager Team surveys, about 40% of all Fort Leonard Wood area military retirees hold an undergraduate degree, and more than 20% possess a masters degree or higher. While only 328 military retirees responded to the survey, Fort Leonard Wood estimates that roughly 1,300 live in the area and received the survey. Extrapolated, more than 800 military retirees currently residing in the area hold a bachelor's degree or higher.

While not quite as educated as their retiree counterparts, military spouses residing in the area are considerably more educated than the general population. According to Prager Team survey results, about 21% of the area's more than 4,000 military spouses hold bachelors degrees and another 13% hold masters degrees. Extrapolating these results to the roughly 4,000 military spouses residing in the area (according to Fort Leonard Wood), over 1,300 military spouses possess college degrees.

IV. CIVILIAN JOB SEEKERS

What positions are being pursued by the area’s job seekers?

In January 2009, the Missouri Career Center registered more than 33,000 entries from job seekers in the seven counties comprising the Fort Leonard Wood area. However, it is important to note that individual county records are not cross-checked by the Center to uncover double counting, and some registrants select more than one job preference. Almost two-thirds, or over 21,000, of these entries were registered in Laclede, Phelps and Pulaski Counties. These figures undercount military retirees and active military spouses who do not seek out government-run career centers to the extent done by the general job-seeking population.

Jobs are sought based on the skills, experience and interests of the job seeker. Therefore, the positions being pursued help gauge the acumen of those seeking them. This includes the skills of those displaced via layoffs and company downsizing. An examination of the top 20 occupations sought (roughly 9,000 of the total 33,000 records) reveals a wide mix of positions, albeit those more heavily skewed toward lower-level production, retail/restaurant and administrative positions.

Top 20 Occupations Sought (January 2009)		
SOC	Occupation	Job Seekers
51-9198	Production Helpers	974
41-2011	Cashiers	909
43-9061	Office Clerks, General	836
51-2099	Assemblers and Fabricators, All Other	609
51-9199	Production Workers, All Other	590
47-2061	Construction Laborers	587
41-2031	Retail Salespersons	409
37-2012	Maids and Housekeeping Cleaners	403
35-3031	Waiters and Waitresses	381
31-1012	Nursing Aides, Orderlies, and Attendants	373
43-4051	Customer Service Representatives, Utilities	357
53-3032	Tractor-Trailer Truck Drivers	351
43-4171	Receptionists and Information Clerks	337
47-2031	Boat Builders and Shipwrights	336
51-4121	Brazers	302
43-5081	Order Fillers, Wholesale and Retail Sales	277
39-9011	Nannies	264
37-2011	Janitors and Cleaners, Except Maids and Housekeeping	260
53-7051	Industrial Truck and Tractor Operators	255
35-2014	Cooks, Restaurant	242

Source: Missouri Economic Research & Information Center, 2009

Interviewed employers tend to characterize the “typical” job seeker as “technical trades-oriented.” Area recruiters and temporary employment agencies estimate that about 20% of the population leaves the area after high school because well-paying jobs are in short supply. But a considerable percentage return years later with work experience gained elsewhere.

What production/trades skills (based on job seeker records) seem to be most prevalent?

General laborers, assemblers and helpers account for the largest share of the production jobs sought. But certain trades skills and industries do stand out. More than 800 seek construction jobs, including many skilled in masonry, carpentry and electrical work. Those in pursuit of truck driving jobs are virtually as plentiful, including those seeking work hauling tractor trailers and with industrial trucking firms. And well over 300 are seeking work in the boat building industry, a fixture in the area’s economy, especially in Laclede County.

Production/Trades Jobs Sought (January 2009)		
SOC	Occupation	Job Seekers
51-9198	Production Helpers	974
51-2099	Assemblers and Fabricators	609
51-9199	Production Workers	590
47-2061	Construction Laborers	587
53-3032	Tractor-Trailer Truck Drivers	351
47-2031	Boat Builders and Shipwrights	336
51-4121	Brazers	302
53-7051	Industrial Truck and Tractor Operators	255
49-3023	Automotive Master Mechanics	202
53-3033	Truck Drivers, Light or Delivery Services	179
49-9042	Maintenance and Repair Workers	154
49-9098	Helpers—Installation, Maintenance, and Repair Workers	123
51-1011	First-Line Supervisors/Managers of Production Workers	87
47-2051	Cement Masons and Concrete Finishers	77
47-4099	Construction and Related Workers	72
47-2111	Electricians	69
47-3012	Helpers—Carpenters	68
51-4081	Combination Machine Tool Setters and Set-Up Operators	67
49-3021	Automotive Body and Related Repairers	66
53-7064	Hand Packers and Packagers	64
49-9099	Installation, Maintenance and Repair Workers	62
49-9021	HVAC Mechanics/Installers	59
51-2092	Team Assemblers	53
53-7199	Material Moving Workers	51
47-2081	Drywall and Ceiling Tile Installers	48

Source: Missouri Economic Research & Information Center, 2009

Do occupations of any growth fields stand out?

One of the nation’s fastest growing fields and, similarly, one whose positions are highly sought after in the Fort Leonard Wood area is the medical profession. Over 1,000 entries of individuals seeking employment were related to the medical field.

The top medical occupations that job seekers from the seven-county area were interested in were Nursing Aides, Orderlies and Attendants, and Licensed Practical and Vocational Nurses. Each of the 21 medical-related occupations for which people were seeking employment requires specific medical training. This implies that there is an abundance of individuals exposed to medical-related occupations, from Medical Assistants to Surgical Technologists. The number of job seekers in this sector is not surprising given the number of technical schools offering training in the medical profession. However, exposure to medical occupations does not necessarily equate to advanced skills. Based on Growth Services’ 2005 survey of area employers, respondents from the health care industry voiced concerns about the relevant and skill level of the local workforce.

Medical Jobs Sought (January 2009)		
SOC	Occupation	Job Seekers
31-1012	Nursing Aides, Orderlies and Attendants	373
29-2061	Licensed Practical and Licensed Vocational Nurses	139
31-1011	Home Health Aides	134
29-2071	Medical Records and Health Information Technicians	74
31-9092	Medical Assistants	67
29-1111	Registered Nurses	52
31-9099	Healthcare Support Workers	41
29-2041	Emergency Medical Technicians and Paramedics	40
31-9091	Dental Assistants	32
29-2052	Pharmacy Technicians	30
29-2034	Radiologic Technologists and Technicians	26
11-9111	Medical and Health Services Managers	19
29-2055	Surgical Technologists	18
29-2099	Health Technologists and Technicians	16
29-1126	Respiratory Therapists	15
29-2012	Medical and Clinical Laboratory Technicians	14
31-9094	Medical Transcriptionists	13
31-1013	Psychiatric Aides	10
31-9095	Pharmacy Aides	10
29-2081	Opticians, Dispensing	9
31-9011	Massage Therapists	9

Source: Missouri Economic Research & Information Center, 2009

How prevalent are computer and engineering-oriented job seekers?

Computer and engineering-oriented skill development is a backbone of the Fort Leonard Wood area’s educational facilities. The Missouri University of Science and Technology (MS&T) is one of the nation’s top engineering schools and a critically acclaimed research institution. Each of the core area’s (Laclede, Phelps and Pulaski Counties) technical schools offers numerous courses in computer design and application, manufacturing technology and engineering preparation. And the Engineer School at Fort Leonard Wood trains thousands of soldiers each year on the most sophisticated technology and processes, hundreds of whom retire in the area upon completion of their military service. In fact, cultivation of advanced computer skills is standard training throughout the installation and its three schools.

All of these entities have vast potential for advanced business development, but only the local technical schools produce a notable amount of job seekers likely to show up on the government job search roles. The other would-be candidates tend to seek out high-end local opportunities via other means, or leave the area entirely to pursue employment.

According to MERIC, more than 400 job seekers were pursuing computer, engineering or electronics-oriented positions in January 2009. A sizable number were seeking employment in occupations that do not, or may not, require a four-year college degree. Among the most common engineering-related positions sought were Operating Engineers, Electrical Engineering Technicians, Civil Engineers and Industrial Engineering Technicians. Computer-related jobs in highest demand were Computer Support and Security Specialists, Programmers, Information Systems Managers, and Computer Systems Analysts.

In contrast to the jobs sought of a lower technical nature, relatively few were sought in the engineering and computer-related professions. But this fact masks the relative ease with which certain high tech and knowledge sector employers are able to procure appropriately skilled labor. More than half of these businesses interviewed by the Prager Team indicated an ability to fill open positions in as little as one to five days. Most had candidates identified before the positions were open, had a number of qualified resumes in hand, and consequently were able to secure the right candidates quickly. With that said, the most advanced positions, such as Computer Software Engineers and seasoned Computer Programmers, are still difficult to fill.

Computer and Engineering Jobs Sought (January 2009)		
SOC	Occupation	Job Seekers
51-9061	Electrical and Electronic Inspectors and Testers	109
47-2073	Operating Engineers	107
15-1041	Computer Support Specialists	57
15-1021	Computer Programmers	37
15-1099	Computer Specialists	30
17-3011	Architectural Drafters	25

17-3023	Electrical Engineering Technicians	20
17-2051	Civil Engineers	18
15-1071	Computer Security Specialists	17
17-3019	Drafters	17
11-3021	Computer and Information Systems Managers	16
15-1051	Computer Systems Analysts	16
17-3013	Mechanical Drafters	14
17-3026	Industrial Engineering Technicians	13
17-2061	Computer Hardware Engineers	12
15-1061	Database Administrators	11
17-1022	Surveyors	10
17-2112	Industrial Engineers	10
15-1081	Network Systems and Data Communications Analysts	9
17-3029	Engineering Technicians, Except Drafters	8
17-3031	Surveying and Mapping Technicians	8
15-1031	Computer Software Engineers	7

Source: Missouri Economic Research & Information Center, 2009

Have there been many layoffs in the area?

From July through December of 2008, a total of 320 individuals were dislocated across the five Fort Leonard Wood area counties for which data is available (Camden, Laclede, Miller, Phelps and Pulaski Counties). In January 2009 alone, this figure almost doubled to 586 dislocated workers in Camden, Laclede, Miller and Phelps Counties (data was unavailable for Pulaski County).

Dislocated Workers by County (July 2008 - January 2009)		
County	July-December 2008	January 2009
Camden County	59	25
Laclede County	106	94
Miller County	68	442
Phelps County	85	25
Pulaski County	2	NA*

*Not available as of reporting

Source: Missouri Central Region Rapid Response Report, 2008

These recent layoffs have substantially increased the number of available, skilled and motivated workers in the area, specifically those with manufacturing acumen. More than 400 individuals were displaced with the closing of the Regal Beloit Corporation’s FASCO electric motors manufacturing plant in Eldon, where HVAC electronic motors were made. Other recent manufacturing layoffs include 76 workers at Keiper, a recliner manufacturer, 43 workers at Lowe Boats, and 35 workers at Gahr Line and Cable.

V. MILITARY RETIREE LABOR POOL

In general, what is the magnitude of the Fort Leonard Wood military retiree population?

Fort Leonard Wood is the home of the U.S. Army Engineer, Military Police and CBRN Schools, where all CBRN, engineer, military police and transportation soldiers receive training. The Mission of MANSCEN is to provide the nation with values-based individuals, leaders and teams trained in basic combat skills and CBRN, engineer, military police and transportation disciplines making Fort Leonard Wood one of the Army's premier training centers. According to Fort Leonard Wood data and recent surveys, approximately 1,300 military retirees (U.S. Army) age 50 and younger reside in the broader 13-county region. Roughly 95% of these individuals are retired enlisted personnel, with the balance retired officers. Since 2006, over 3,000 individuals connected with Fort Leonard Wood retired from military service. It is safe to assume that, had sufficient jobs been available, many more of them would have chosen to remain in the area.

Why is the Fort Leonard Wood military retiree population important to businesses making investment or site selection decisions?

The term "retirement" is a misnomer when it comes to military retirees. Based on the Retiree Survey, almost 75% of those listed as military retirees are not finished working, far from it. The average age of military retirees living in the Fort Leonard Wood area is only 51, and roughly 48% are between the ages of 40 and 49. More than 40% have been retired from the military for five years or less. While their military service may have drawn to a close, these highly trained individuals are just now embarking on their civilian careers. Most analyses of the area's labor shed rely on U.S. Census data, which fails to fully recognize the magnitude of military retirees residing in the area.

This is a vast geographic area. How does this impact a company specifically interested in a Pulaski County location?

Almost two-thirds of these military retirees – more than 800 – reside in Pulaski County itself. However, localized studies have shown that residents of this region are accustomed to traveling significant distances for work. As such, the preferred 10-mile commute threshold often examined by site seekers does not do justice to the true commute radius of the Fort Leonard Wood area. Almost 25% of survey respondents travel more than 20 miles to work each way. Therefore, a more realistic labor shed, which includes Pulaski County and its contiguous counties, includes more than 1,200 military retirees age 50 and younger.

13-County Military Retirees Age 50 and Younger (2009)				
Area	Enlisted	Officers	Percent of 13-County Region	Absolute Number in 13-County Region
Camden County	97	8	8.0%	105
Crawford County	18	0	1.4%	18
Dallas County	8	0	0.6%	8
Dent County	9	0	0.7%	9
Gasconade County	8	3	0.8%	11
Laclede County	105	9	8.6%	114
Maries County	5	0	0.4%	5
Miller County	14	1	1.1%	15
Phelps County	89	8	7.3%	97
Pulaski County	801	32	63.1%	833
Texas County	74	6	6.1%	80
Webster County	18	3	1.6%	21
Wright County	3	1	0.3%	4
Pulaski and Contiguous Co.	1,185	64	94.6%	1,249
13-County Region Absolute	1,249	71	100.0%	1,320
13-County Region Percent	94.6%	5.4%	NA	NA

Source: Fort Leonard Wood, 2009

Are these strictly retirees from Fort Leonard Wood who remained in the region?

Military retirees in the Fort Leonard Wood area are not necessarily those who retired from Fort Leonard Wood itself. A full third of the region’s military retirees (survey respondents) closed out their military careers at installations outside Missouri and relocated to the Fort Leonard Wood area. This includes many from Arizona, California, Colorado, Florida, North Carolina, Virginia, Washington and other states characterized by a high quality of life for retirees. Relocation from these states suggests that Fort Leonard Wood-based employers have potential to attract labor from outside the area for the right jobs.

Why do military retirees remain in the Fort Leonard Wood area?

Nine out of ten surveyed military retirees are currently employed. The majority of these individuals work at Fort Leonard Wood as civilians (75%) or are employed by the installation’s many defense contractors (16%). While employment is the most common reason military retirees remain in the area, it is by no means the only reason. Roughly 36% of respondents also remain in the area because of its modest cost of living, 26% list the quality of life as a contributing factor, and 21% claim the schooling for their children as a reason for their continued residence.

The military population in many military towns is characterized by relatively low educational achievement levels with few college-degreed individuals. How do military retirees in the Fort Leonard Wood area compare?

As compared to many military areas, the Fort Leonard Wood area is an anomaly. As a highly sophisticated training institution, a massive amount of military-connected individuals are college educated. Although the vast majority of military retirees were enlisted personnel, the days when only officers were likely to be college educated are long gone. About 40% of all surveyed retirees hold an undergraduate degree; more than 20% hold a masters degree or higher. This is more than twice the educational achievement level found in Missouri statewide and more than three times the achievement level of the combined Laclede-Phelps-Pulaski Counties. The college degrees held by military retirees are quite varied and extremely valuable to private sector job recruiters.

Education Achievement* (2009)			
	Fort Leonard Wood Area Military Retirees	Laclede, Phelps, Pulaski Counties Population	Missouri Population
Bachelors Degree	40%	11%	15%
Masters Degree or Higher	20%	7%	9%

* Approximations

Source: Prager Company Military Retiree Survey (2009) and U.S. Census Data

Military Retiree College Degrees* (2009)	
Bachelors Degrees	Masters Degrees
Business/Business Mgmt/Accounting (27%)	Education (21%)
Law Enforcement/Criminal Justice (23%)	Business/Business Admin. (17%)
General Studies/Liberal Arts (15%)	Human Resources/Personnel (13%)
Computer Info. Systems/Info. Mgmt (11%)	Engineering (9%)
Education (10%)	Business/Org. Security Mgmt (8%)
Engineering/Maintenance Technology (9%)	Info. Systems/Info. Mgmt (6%)
History (8%)	Public Admin/Political Sc. (6%)
Human Resources/Personnel (5%)	

*Most common degrees held by survey respondents reporting

Source: Prager Company Military Retiree Survey, 2009

Scores of individuals receive basic or fundamental training at one military installation, then transfer to Fort Leonard Wood for more advanced training and skill development. Those who retire in the area elevate the education level of the region and provide a critical mass of training and educational acumen rarely found elsewhere. This information is not sufficiently captured in U.S. Census data and, therefore, not readily available to site seeking investors who would otherwise benefit from this intelligence.

Local businesses and human resource staff speak highly of the military retirees they have hired over the years. Although some employers seek the specific expertise of recent retirees, all of those interviewed with experience with military retirees stated the skills and values that retirees bring to the job make them invaluable.

Are these military retirees available for work should opportunities present themselves?

As highly educated individuals with specialized skills, most Fort Leonard Wood area military retirees are already employed. According to the Military Retiree Survey, 97% have jobs and, of these, roughly three-fourths are employed by Fort Leonard Wood. But a large number state that they are working in areas that are not their preferred profession and/or not fully leveraging their skill sets.

Over half of the military retirees age 50 and younger (i.e. extrapolated to more than 600 individuals) have pursued jobs that better utilize their military training and skill sets. And 44% of those who would like jobs better aligned with their skills are pursuing them now – extrapolated to more than 260 individuals. A great many of these individuals could be classified as “underemployed.” Further, 16% of those surveyed are employed by military contractors; organizations that tend to retain individuals on a project-by-project basis, rather than long-term.

What training and skills do Fort Leonard Wood military retirees possess?

Each of the three Fort Leonard Wood schools – CBRN, Engineer and Military Police – has prepared its students for successful civilian careers upon completion of their military service. But unlike non-military academies, when graduates finally exit Fort Leonard Wood’s schools, they leave with practical, battle-tested experience, having applied course study in challenging, pressure-filled settings. Furthermore, more than 40% of survey respondents have at least five years of civilian work experience in their preferred occupations.

Engineer School

Roughly a third of survey respondents retired from Fort Leonard Wood list the Engineer School as their primary training institution. Applying this percentage to the entire Fort Leonard Wood retiree population translates into roughly 320 individuals with training from this school. While trained for military purposes, the School’s education has direct application to the private sector. More than 70% of those surveyed cite expertise, if not mastery, in Engineering Management. More than 60% claim acumen in Systems Management and Program Integration. And 30% to 35% have expertise, if not mastery, in Computer Modeling, Auto CAM Drafting, and Geographic/Geospatial Information Systems.

Military retirees who trained at Fort Leonard Wood’s Engineer School seek demanding positions in the private sector. Many of those surveyed are pursuing, or would pursue, positions in such areas as Computer Information Systems, Simulations and Gaming,

Engineering Management, Geographic Information Systems, Information Technology, Computer Network Engineering, Web Development, Systems Integration and Electronic Engineering. A number of the disciplines acquired at Fort Leonard Wood’s Engineer School lend themselves to careers in the construction industry, including positions in Construction Inspection and Management, Heavy Construction Repair, Highway and Bridge Construction, Logistics and Supply Chain Management.

Fort Leonard Wood Retirees: Engineer School (2009)		
Transferable Training	Percent with Stated Expertise or Mastery	Total with Stated Expertise Or Mastery
Engineer School (36.2% of Total)		Total: 320
Engineering Management	72.4%	232
Systems Management	64.9%	208
Program Integration	60.7%	194
Computer Modeling	35.5%	114
Geographic/Geospatial Information Systems	29.6%	95

Source: Prager Company Military Retiree Survey, 2009

Military Police School

About 23% of survey respondents (military retirees) cite the Military Police School as their primary source of training, translating into more than 200 individuals across all area military retirees. These individuals claim considerable acumen in Criminal Technology (including Cyber), Police Intelligence Management and Conventional Physical Security. Between 60% and 70% of survey respondents claim expertise or mastery in these areas of study.

While Military Police training does not translate as readily into private sector employment as Engineer or CBRN training, individuals versed in this area are well suited for such careers as Military Intelligence, Security and Homeland Security, Investigation and Inspection. Furthermore, the fundamental technical tools acquired here lend themselves to unrelated careers dependent upon knowledge of Computer Information Systems, Data Processing, Videography, Audio Technology and Geographic Information Systems.

Fort Leonard Wood Retirees: Military Police School (2009)		
Transferable Training	Percent with Stated Expertise or Mastery	Absolute with Stated Expertise or Mastery
Military Police School (23.2% of Total)		Total: 205
Police Intelligence Management	72.7%	149
Criminal Technology (including Cyber)	60.0%	123
Conventional Physical Security	57.7%	118

Source: Prager Company Military Retiree Survey, 2009

Chemical, Biological, Radiological and Nuclear (CBRN) School

Roughly 10% of surveyed military retirees list the CBRN School as their primary source of training. That translates into about 88 retirees with chemical-related skills acquired at Fort Leonard Wood. These skills are in high demand by chemical industry employers, including Chemical Safety and Handling, Operational Radiation and Biological Detection.

Expertise garnered at Fort Leonard Wood’s CBRN School directly or indirectly translates into numerous chemical occupations and disciplines, many of which are considered quite desirable by survey respondents. These include, but are not limited to, Environmental Management, Environmental Testing and Compliance, Materials Testing, Chemical and HAZMAT Response, and Disaster Planning.

Fort Leonard Wood Retirees: CBRN School (2009)		
Transferable Training	Percent with Stated Expertise or Mastery	Absolute with Stated Expertise or Mastery
CBRN School (9.6% of Total)		Total: 88
Chemical Safety and Handling	70.3%	62
Operational Radiation	62.1%	55
Biological Detection	56.0%	49

Source: Prager Company Military Retiree Survey, 2009

Truck Driving School

Albeit not one of Fort Leonard Wood’s major learning institutions, Truck Driving is an important component of the installation’s training regimen. Nine of every 10 military truck drivers (Motor Transport Operators) are trained at Fort Leonard Wood. This six-week course provides hands-on training (five weeks) in real and simulated harsh and dangerous conditions. Based on the Military Retiree Survey, 6% (extrapolated to more than 50 military retirees residing in the area) are trained as Motor Transport Operators.

Primary Occupational Classifications of Area Military Retirees

Upon retirement, soldiers leave with a Military Occupational Classification (MOS). These MOSs translate into Standard Occupational Classifications (SOCs) or general job titles in the private sector. MOSs of Fort Leonard Wood area military retirees were uncovered via the Military Retiree Survey. Provided below is the translation of these MOSs into civilian occupations and the extrapolated number of military retirees trained in these occupations and residing in the area. This is based on the percent of survey respondents multiplied by the estimated total of 1,320 military retirees remaining in the area (according to Fort Leonard Wood data). Note that this information is not confined to those trained at Fort Leonard Wood. Only those accounting for 2% or more of the surveyed total are listed.

- Civil Engineers and Construction-Related Workers (14.1% extrapolated to 186 individuals)
- Police Patrol Officers (13.4% extrapolated to 177 individuals)
- Heavy and Tractor Trailer Truck Drivers (6.1% extrapolated to 81 individuals)
- Tactical Operations and Air/Weapons Specialists (6.1% extrapolated to 81 individuals)
- Non-Legal, Non-Medical Secretaries (2.8% extrapolated to 37 individuals)
- Mobile Heavy Equipment Mechanics (2.4% extrapolated to 32 individuals)

Are the skills of military retirees an accurate reflection of the training emphasis at Fort Leonard Wood? What are the civilian equivalents of the military occupations for which personnel are trained?

The occupational breakdown of military retirees who choose to remain in the area after retirement are fairly similar to the occupations of Fort Leonard Wood retirees in total. These MOCs directly correlate to a number of civilian occupations or SOCs in demand in the marketplace today. There were 10 occupations for which at least 1% of the total military retirees were trained. These civilian job equivalents include: Emergency Medical Technicians and Paramedics, Operating Engineers and Other Construction Equipment Operators, Civil Engineers, Automotive Master Mechanics, First-Line Supervisors/Managers of Police and Detectives, and Light or Delivery Service Truck Drivers.

MOS/SOC Codes of Fort Leonard Wood Retirees (2006-2009)				
MOS Occupation Name	MOS	Number of FLW Retirees	Civilian Occupation Name	SOC
Military Police	31B	330	Police Patrol Officers	33-3051.01
Combat Engineer (Army Enlisted) Combat Engineer (Army Commissioned Officer only)	21B	317	Construction and Related Workers, Civil Engineers	47-4099.99 17-2051.00
Motor Transport Operator	88M	168	Truck Drivers, Heavy and Tractor-Trailer	53-3032.00
Chemical, Biological, Radiological, Nuclear (CBRN) Specialist	74D	139	Tactical Operations and Air/Weapons Specialists and Crew Members	55-3019.99
Bridge Crewmember	21C	92	Construction and Related Workers	47-4099.99
Health Care Specialist	68W	75	Emergency Medical Technicians and Paramedics	29-2041.00

Construction Equipment Operator	21E	73	Operating Engineers and Other Construction Equipment Operators	47-2073.00
Unit Supply Specialist	92Y	68	Stock Clerks - Stockroom, Warehouse, or Storage Yard	43-5081.03
Engineer, General	21A	52	Civil Engineers	17-2051.00
Human Resources Specialist	42A	51	Human Resources Assistants, Except Payroll and Timekeeping	43-4161.00
Infantryman (Army - Enlisted)	11B	36	Infantry	55-3016.00
Wheeled Vehicle Repairer	63B	34	Automotive Master Mechanics Automotive Specialty Technicians	49-3023.01 49-3023.02 29-1029.99
Military Police (Army - Commissioned Officer only)	31A	32	First-Line Supervisors/Managers of Police and Detectives	33-1012.00
Motor Vehicle Operator (Marine Corps - Enlisted)	3531	30	Truck Drivers, Light or Delivery Service	53-3033.00

Sources: Fort Leonard Wood. MOS to SOC conversion via O*Net Online, 2009

In addition to industry- or occupation-specific skills, do retirees have “soft skills” important to the private sector?

Often overlooked by private employers focused on technical acumen are the managerial, supervisory and highly advanced, mission-critical decision skills individuals acquire at Fort Leonard Wood. While some may refer to these as “soft skills,” they are, in fact, the pillars that allow retired military personnel to rise through the private sector ranks often faster than their non-military counterparts. Many organizational and supervisory skills are acquired throughout military service. But in general, the higher the rank, the more advanced the managerial acumen and certainly the more finely honed the leadership skills. Provided is a partial list of the many leadership, management and strategic thinking certifications commonly held by retired Fort Leonard Wood officers and retired enlisted personnel as well.

Military Certifications of Value to Private Sector*	
Military Certification	Private Sector Value-Added
<ul style="list-style-type: none"> Personnel Management and Organizational Leadership for 	High-level strategic vision, senior direction, communication and motivational acumen,

Military Certifications of Value to Private Sector*	
Executives	instruction and guidance and mission-critical leadership
<ul style="list-style-type: none"> • Total Quality Management • Total Quality Leadership • Continuous Quality Improvement 	Highly efficient quality control, strategic thinking and management for effective quality assurance equivalent to Six Sigma. Emphasis on advanced organizational systems, processes and critical thinking
<ul style="list-style-type: none"> • Certified Network Engineer • Certified Network Administrator • Certified Technical Trainer • Certified Network Instructor 	Development of integrated systems, advanced computer skills, and installation, configuration, operation and oversight of networks for business solutions
<ul style="list-style-type: none"> • Effective Writing • Communications 	Advanced communication skills

* Partial list of certifications and miscellaneous non occupation-specific training
 Sources: Prager Company Military Retiree Survey (2009) and Prager Company experience

In addition to these skills and certifications, the majority of military retirees have or had security clearance -- Secret or Top Secret -- thereby allowing them to work on highly sensitive matters commonly encountered by military contractors. In many cases, this clearance may need to be re-activated. This is quite desirable for companies that can ill-afford the cost and time required to obtain necessary security clearance.

Are the Fort Leonard Wood area’s military retirees affordable?

Affordability is a relative term. The military retirees tend to be paid a modest salary relative to their advanced training, finely honed skills in demanding settings, general education level and strong managerial acumen. With an average age of 51, the greatest percentage of the area’s military retirees (44%) earn only between \$50,000 and \$75,000 annually. An additional 30% earn below \$50,000. Only 6% make more than \$100,000 per year.

Two-thirds of surveyed military retirees would consider changing jobs for those that better utilize their skills and experience. Perhaps surprisingly, 35% would not require a pay increase to do so, and an additional 31% would change to a better suited job for a modest 10% pay increase or less. Several reasons account for this, including the general low cost of living in the Fort Leonard Wood area, access to inexpensive Commissary products and services, free or deeply discounted medical service via the Veteran’s Medical Benefits Package and quality treatment on Fort Leonard Wood, and the military’s pension plan (with payment commencing upon retirement from the military, not triggered by age).

In addition to the wage and salary savings, employers hiring military retirees may find they need to pay less in benefits costs for these individuals. Military retirees receive health care benefits -- hospital care, outpatient care, prescription drugs and preventative care -- subsidized higher education tuition and fees for advanced training, and other benefits that may substantially

reduce the employment costs of their private employers. Benefits are impacted by length of service and other variables. Military retirees tend to be drug free, healthier and more conscious of workplace safety than their private sector counterparts. All of these variables can reduce the direct or indirect cost to their employers. Consequently, companies considering locating in the Fort Leonard Wood area could acquire highly trained and skilled leaders at affordable wage and salary levels, with the possibility of reduced benefit requirements as well.

VI. MILITARY SPOUSE LABOR POOL

Are military spouses an important part of the Fort Leonard Wood area's labor force?

Fort Leonard Wood's military spouses are a woefully under-tapped resource for employers seeking full-time or part-time labor. Over 4,000 military spouses (predominantly women) reside in the Fort Leonard Wood area. Due to a need to be close to the installation, 91% (based on survey results) call Pulaski County home. The next most common place of residence is Texas County, home to 6% of military spouses.

To what extent are the Fort Leonard Wood military spouses interested in and available for work?

The majority of military spouses are interested in some form of employment. And roughly 59% of surveyed spouses currently work. Assuming this percentage for the entire spousal population, roughly 2,400 hold jobs. And more than 75% of those working hold full-time positions. Almost half of working military spouses are employed at Fort Leonard Wood. An additional 10% are employed by military contractors. Albeit considerable, these percentages are far less than military retiree employment, where 75% work for Fort Leonard Wood and an additional 16% for its military contractors.

Extrapolating survey data indicates that close to 1,700 military spouses do not presently hold jobs, but more than 80% of these individuals are interested in doing so. Most would like full-time employment. Further, about 60% of those currently employed are interested in better/more appropriate jobs. Applying survey findings to the entire military spouse population, it can be assumed that more than 1,000 spouses are seeking to enter the full-time job market, and an additional 1,400 currently employed would take jobs better aligned with their needs and aspirations. As such, more than 2,500 military spouses are likely available for work full-time should the right employers and jobs present themselves. An additional 400 or so are interested in part-time employment.

Are military spouses a stable source of labor?

Military spouses typically will remain at a location for as long as their active duty spouses are stationed there. A great many will remain through deployment periods as well. Close to 90% of the surveyed spouses expect to reside in the Fort Leonard Wood area for a minimum of one additional year, and more than 40% expect to remain in the area for at least three years. Nine out of 10 military spouses seeking work would like employment lasting one year or more.

Are the military spouses properly educated and trained for work?

A pervasive misconception is that spouses lack suitable education and training. About 21% of surveyed military spouses possess an undergraduate degree, and an additional 13% hold a masters degree. Consequently, based on extrapolated data, almost 1,400 college-educated

military spouses reside in the Fort Leonard Wood area. That makes the level of college education among military spouses roughly double that of the area’s general population and notably higher than Missouri state averages. Experts note that, as the level of college requirements on active military grows, so does the level of spousal education. In addition to military spouses with four-year college degrees or advanced degrees, close to half of those surveyed have some college, community college or technical school education and training.

The most common undergraduate degrees among military spouses are Business Administration, Management, Accounting, Education, Psychology and Criminal Justice. Masters degrees of the spousal population tend to be in Business Administration, Leadership and Management, Education and Human Resources. Many of the military spouses without four-year college degrees have considerable community college or technical training in business disciplines such as communications, accounting, information technology and general administration.

Do military spouses have relevant work experience?

The overwhelming majority of military spouses have experience in their chosen fields, regardless of whether they are working in them now. Almost half claim more than five years experience in their preferred field, and another 20% claim three to five years. Locally, however, work experience can only be accumulated if jobs are available. Unfortunately, attractive positions are hard to come by in the Fort Leonard Wood area and, with current economic conditions, they are getting more scarce. A disproportionate share of military spouses, therefore, lack local experience in their chosen fields and/or those for which they have been educated. It is not uncommon, for instance, to find military spouses with undergraduate and even masters degrees in Business working as administrative assistants. Secretarial and administrative support work is far and away the most prevalent field of Fort Leonard Wood military spouses. Because of a lack of relevant *local* job experience, it is all too easy for employers to overlook the real acumen of these military spouses.

Common Jobs of Military Spouses (2009)	
General Occupations	Approximate Percentage*
Administrative Assistant/Secretary	15% to 20%
Medical or Dental Assistant	5% to 10%
Child Care Provider/Child & Youth Programs	5% to 10%
Office Automation Assistant	Below 5%
Accounting Clerk/Bookkeeper	Below 5%
Restaurant Worker	Below 5%

* Of working military spouse survey respondents
Source: Prager Company Spouse Survey, 2009

More than one-third of military spouses could be classified as “underemployed.” These individuals do not hold jobs that adequately leverage their work talents, education/training and experience. The table below, derived from the Spouse Survey, compares 1) the percentage of

military spouses who state they are qualified and interested in certain fields with 2) the percentage of those actually working in these fields. It further extrapolates the general number of spouses who may be available for work in these fields if the right jobs present themselves. Only certain fields have been selected and no attempt has been made to verify true job qualifications of the military spouses.

Present Versus Preferred/Qualified Fields for Military Spouses (2009)			
Field of Work	Percent Presently Employed in Field	Percent “Qualified” and Interested in Employment in Field	Extrapolated Number of “Qualified” and Interested Military Spouses*
Communications	1.9%	18.4%	454
Sales	2.8%	18.6%	459
Accounting and Support	4.6%	15.6%	385
Finance and Support	2.8%	14.3%	353
Marketing and Support	1.9%	10.2%	252
Legal Support	0.0%	10.2%	252
Life, Physical and Social Science	0.0%	7.5%	185
Protective Services	0.9%	4.8%	119
Computer Science and Support	0.9%	4.1%	101

*Based on survey data of those not employed interested in work and those employed seeking more suitable jobs, a total of 2,469. Note that respondents could select multiple “qualified/interested” fields
 Source: Prager Company Spouse Survey, 2009

What are the job search experiences of the area’s military spouses? What challenges do they encounter?

The Fort Leonard Wood area is filled with military spouses seeking new or better employment. But for far too many, jobs are just not available. Based on survey results, more than 40% of employed military spouses are currently seeking more suitable work and have been for quite some time. Countless others -- both those employed as well as the jobless -- have given up their job search. Most have done so out of frustration. But others claim different reasons. Almost three-fourths of military spouses have children living with them and, thus, the responsibility of caring for these dependents. This makes finding suitable jobs with appropriate hours and transportation access particularly challenging. Many of the job-seeking spouses cite the cost or adequacy of available child care as a reason for curtailing their search. Most of those currently employed drive less than 10 miles to work but are willing to increase their commute to 20 miles if necessary.

In addition to the tight job market and other stated problems, more than half of the job-seeking spouses list the stigma of hiring a military spouse as a notable stumbling block. About 57% of survey respondents claim area employers are less willing to hire military

spouses than others seeking the same job. The overwhelming reason they state for this stigma is turnover. Military spouses tend to reside in the area for three to four years until their active duty spouses are transferred. According to survey respondents, private employers view this as an insufficient amount of time to justify investment in on-the-job training. But while routine transfer is a fact of military life, the typical duration of stay (three to four years provided early transfer does not occur) is actually better than national averages. According to the U.S. Bureau of Labor Statistics, 76% of individuals ages 23 to 27 leave their job in less than two years. About 70% ages 28 to 32, and 61% ages 33 to 37, also leave their jobs in less than two years. Further, with few openings in this rather remote area, spouses tend to hold on to jobs once provided them. By national standards then, the turnover of Fort Leonard Wood military spouses is more a perceived than an actual problem.

Given the highly demanding and time-intensive nature of military service, spouses of active duty personnel may be required to shoulder greater domestic responsibilities than their civilian counterparts. Tending to a sick child and attending school-related meetings are examples of responsibilities less easily shared. Job seeking spouses claim that local employers may view these as distractions impeding their ability to function in the workplace fully and/or flexibly. While these demands may be real at times, they are not appreciably different from the employer standpoint than those encountered by other two wage-earner households.

Are Fort Leonard Wood military spouses a good job investment for employers?

Factoring in their education and work experience, military spouses offer exceptional value to employers if connected with jobs that adequately leverage their talents. Because of the cost of child care, transportation and other work-related expenses, most surveyed military spouses claim they need to earn a minimum of \$12 per hour. And more than one-third state they require at least \$14 per hour. While these requirements may appear high, the 2008 average hourly wage in Missouri was \$17.90. In contrast, available Fort Leonard Wood area jobs encountered by military spouses are reported to pay around \$7 to \$8 per hour, slightly more than the State's mandatory minimum wage of \$7.05 established in January 2009.

Paying the midpoint between the State's minimum and average wages would likely enable employers to hire and retain a vast number of job-seeking military spouses. Furthermore, employers hiring military spouses may be able to save considerably on health care and other typical employee benefit costs. These individuals are covered by their active duty spouses' military health care and other associated military benefits. Therefore, they may not require private employer' supplemental benefits. A 2004 study by the Rand Corporation found that military spouses (wives) are less likely to be employed than their civilian counterparts and earn \$5,500 to \$7,400 less a year (in 2004 dollars), even though they are better educated, on average. In the Fort Leonard Wood area, military spouses remain an under-appreciated resource waiting to be properly tapped.

Is the critical mass of spousal talent apparent to prospective business investors?

Business investors and site seekers examining an area’s labor climate tend to rely on readily available data sources, such as the U.S. Census and State workforce entities. If these are the primary sources utilized, the critical mass of military spouse talent and work acumen will be regularly overlooked. A great many of these individuals interested in working are not registered as unemployed, and the underemployed will, at best, only be listed by their present occupation, not the one for which they are trained. This means that literally thousands of military spouses will go unnoticed, a great many with skills sought by today’s discerning businesses, including those listed below.

Reported Skills and Acumen of Military Spouses* (2009)		
Computer Technology	Accounting	Human Resources
Marketing	General Analytics	Medical Records/Tech
Finance	Customer Service	Bilingual

* Survey responses

Source: Prager Company Spouse Survey, 2009

VII. EDUCATION AND TRAINING

To what extent are the educational and training institutions an asset to labor recruitment?

The Fort Leonard Wood area is home to a number of technical training schools. Local businesses do not only rely heavily on them to vet potential employees, but because of their satisfaction with past graduates, they return regularly to fill future positions. Despite the volume of local businesses that regularly tap the technical schools for employees, there are simply not enough jobs for the magnitude of qualified graduates.

Missouri University of Science and Technology is a higher education gem located in the Fort Leonard Wood area. MS&T, a critically acclaimed technology and engineering school, graduates supremely qualified researchers and practitioners. Advanced technology businesses and national research institutions return year after year to recruit students from MS&T because of the rigorous academic and practical training the students receive. But because of limited local job availability, less than 1% of the MS&T student body remains in the Fort Leonard Wood area upon graduation. In combination, MS&T and the numerous technical institutions graduating hundreds of technically trained students annually represent fertile resources for recruiting highly skilled and motivated young employees.

How do local high school students perform?

Several of the Fort Leonard Wood area high schools provide a quality education and graduate high caliber students. Students in the Waynesville, Rolla and Lebanon school districts score well on standardized communication and math tests and, in certain areas, outperform the State. While ACT scores of these schools do not differ markedly from the State average, graduation rates are notably higher. It is worth noting that Missouri outperforms the national ACT averages and exceeds those of half the comparison states.

High School Educational Achievement (2008)				
School	MAP Math Test*	MAP Communication Test**	ACT Scores	Graduation Rates
Crocker R-II	44.4%	30.8%	20.3	91.5%
Dixon R-I	38.0%	33.3%	21.0	95.1%
Laquey R-V***	45.6%	42.9%	20.7	85.7%
Richland R-IV	31.1%	23.0%	19.7	89.7%
Waynesville R-VI	41.2%	42.4%	21.2	93.8%
Pulaski County Average	40.1%	34.5%	20.6	91.2%
Rolla 31	56.9%	48.3%	23.2	93.0%
Lebanon R-III	46.5%	40.2%	21.6	86.5%
Iberia R-V	43.8%	38.8%	20.9	93.3%

Cabool R-IV	36.0%	33.9%	20.4	90.8%
Missouri Average	46.2%	39.2%	21.6	85.2%

* Percent of 10th graders – Missouri Assessment Program proficient/advanced levels

** Percent of 11th graders – Missouri Assessment Program proficient/advanced levels

*** Data for Laquey R-V is 2007

Source: Missouri Department of Elementary and Secondary Education, 2008

ACT Scores (2008)						
Subject	Missouri	Arkansas	Illinois	Kansas	Nebraska	U.S.
English	21.4	20.7	20.4	21.5	21.8	20.6
Mathematics	21.0	20.1	20.7	21.8	21.8	21.0
Reading	22.0	21.0	20.6	22.6	22.5	21.4
Science	21.4	20.3	20.5	21.8	21.9	20.8
Composite	21.6	20.6	20.7	22.0	22.1	21.1

Source: ACT News, 2008.

What type of technical school training is available?

There are a number of technical training options for students in the Fort Leonard Wood area, several of which serve Laclede, Phelps and Pulaski Counties and their surrounding environs. This includes Rolla Technical College/Rolla Technical Institute, Waynesville Technical Academy, and Lebanon Technology and Career Center. Each house educational resources capable of training individuals for successful careers and responding quickly to employer training needs. Their combined emphasis and expertise lies primarily in automotive, computer, medical, machining and manufacturing, and, more recently, engineering-related disciplines.

Technical School Select Offerings (2008)			
Curriculum	Rolla Technical College/Rolla Technical Institute	Waynesville Technical Academy	Lebanon Technology and Career Center
Accounting			Yes
Automotive Technology	Yes	Yes	Yes
Banking and Finance			Yes
Business and Office Technology			Yes
Commercial Printing		Yes	
Computer Aided Drafting			Yes
Computer Aided Manufacturing			Yes
Computer Applications			Yes
Computer Information Technology	Yes	Yes	
Computer Maintenance		Yes	
Computer Repair and Networking			Yes

Construction Technology	Yes	Yes	
Culinary Arts		Yes	
Drafting and Design	Yes		
Emergency Medical Technician	Yes		
Fire and Rescue Science	Yes		
Graphic Design	Yes	Yes	
Machining Technology	Yes		Yes
Pathway to Engineering	Yes		
Nursing		Yes	Yes
Robotics			Yes
Welding Technology		Yes	Yes
Wood Manufacturing and Design	Yes		

Sources: Rolla Technical College/Rolla Technical Institute, Waynesville Technical Academy and Lebanon Technology and Career Center websites, 2009

How do the technical training institutions connect with the K-12 schools?

High school students considering bypassing four-year college and entering the job market are carefully screened and examined for interest and aptitude before being recommended for technical school training. Those recommended at the high school level typically have high attendance rates and grade point averages, few if any disciplinary problems, and demonstrated drive and motivation. Competition for slots in the area’s technical programs is high because student interest far exceeds availability. If appropriate, internships are structured to help high school seniors bridge from school to technical training and full-time employment.

Local businesses play strong roles in ensuring graduates are ready for immediate employment. Technical schools engage local businesses as Advisory Board members who alert schools to workforce skills required. They also provide technical expertise to design and improve training curricula.

What opportunities exist to hire MS&T graduates?

MS&T is one of the nation’s top research universities. It was ranked 54th among public universities and a top 55 engineering school by *U.S. News & World Report* (2007), a top 25 entrepreneurial campus by *Forbes* magazine (2006), as well as one of America’s best values and schools for job placement by the *Princeton Review* (2008). Yet with close to 5,000 undergraduate students and almost 1,500 graduate students, a miniscule number land jobs in the Fort Leonard Wood area upon graduation. MS&T graduates more than 1,000 students yearly, but according to university sources, all but 1% of the graduates move away from the area for higher paying jobs that utilize their expertise.

The caliber of the student body is reflected in the number and types of companies that come to MS&T yearly to recruit employees. During the 2007-2008 school year, close to 700 employers from 41 states and 3 countries recruited MS&T students. This included Sprint,

ExxonMobil, Boeing Company, Archer Daniels Midland (ADM), Lockheed Martin, NAVAIR, Anheuser-Busch, Burns & McDonnell, Emerson, Garmin International, Monsanto Company and Schlumberger. According to university officials, the average MS&T student has received four to six job offers by the middle of his/her senior year.

Over the three-year period from 2005 to 2007, MS&T graduated more than 2,500 engineering undergraduate and graduate students. Recruiters from all over the nation and internationally annually come to MS&T to recruit graduates.

MS&T Undergraduates (2005-2007)			
Instructional Program	2005	2006	2007
Computer and Information Sciences and Support	87	80	73
Engineering	493	504	593
Biological and Biomedical Sciences	17	23	36
Mathematics and Statistics	12	17	12
Physical Sciences	26	34	35

Sources: National Center for Education Statistics of the U.S. Department of Education, and the Institute of Education Sciences, 2009

MS&T Graduate Students (2005-2007)			
Instructional Program	2005	2006	2007
Computer and Information Sciences and Support	58	52	41
Engineering	396	352	324
Biological and Biomedical Sciences	7	6	8
Mathematics and Statistics	5	7	8
Physical Sciences	40	48	37

Sources: National Center for Education Statistics of the U.S. Department of Education, and the Institute of Education Sciences, 2009

While MS&T is known for the excellent caliber of its students, jobs are not available locally to take advantage of this asset. Anecdotal evidence provided by the university indicates that many more graduates would stay in the area if equivalent types of jobs were available locally. University sources state that at least three out of five MS&T graduates express interest in remaining in Missouri provided jobs are available.

VIII. LABOR COST

Are workforce costs in the Fort Leonard Wood area competitive?

A company investing in the Fort Leonard Wood area will not only benefit from access to an abundant labor force but also from the modest costs associated with this workforce. Wage rates among certain occupations and relative unemployment insurance costs will be a financial benefit for most companies. In addition, there are a number of workforce training incentives that appeal to existing and relocating companies. As of this writing, the State of Missouri also is slated to receive significant funding through the U.S. American Reinvestment and Recovery Act of 2009 in support of its workforce development efforts.

Wages in the Fort Leonard Wood area vary greatly, but they are generally higher among employers closer to the installation. They are highest in Pulaski County. But even with the impact of this massive employer, wages in the Fort Leonard Wood area are well below those of the State’s more urbanized locations. The average annual wage in Pulaski County, for instance, is more than \$2,200 less than that of both Boone and Greene Counties. The average wage in St. Louis City is twice as high as wages in the majority of counties in the Fort Leonard Wood area.

County Wage Rates (2007)		
Area	Average Hourly Wage	Average Annual Wage
Camden County	\$12.68	\$26,382
Laclede County	\$12.86	\$26,755
Maries County	\$11.53	\$23,992
Miller County	\$12.25	\$25,479
Phelps County	\$14.56	\$30,280
Pulaski County	\$14.88	\$30,941
Texas County	\$11.55	\$24,019
Boone County (Columbia, MO)	\$16.18	\$33,650
Greene County (Springfield, MO)	\$15.97	\$33,218
St. Louis City	\$23.53	\$48,936

Source: Missouri Economic Research & Information Center, 2009

How do the wages compare to those of contiguous states?

Compensation data provided by MERIC for the Missouri Central Region (comprised of 19 counties, including those of the Fort Leonard Wood area) indicate a notable cost advantage for this area in both traditional production occupations as well as the more advanced computer and engineering-related occupations. Salaries for production workers are distinctly lower in the Missouri Central Region than in Missouri overall as well as the five comparison states – Arkansas, Illinois, Iowa, Kansas and Nebraska. Truck Drivers, Automotive Technicians,

Machine Tool Workers, Construction Workers, and General Production Laborers and Assemblers are among the occupations offering significant savings.

Region and State Salaries for Production Occupations (2007)							
Occupation and SOC Code	Arkansas	Illinois	Iowa	Kansas	Missouri	Nebraska	Missouri Central Region
Construction Laborers (47-2061)	\$24,340	\$41,860	\$30,770	\$28,380	\$37,340	\$24,770	\$31,381
Production Workers (51-9199)	\$27,970	\$28,050	\$27,610	\$33,550	\$26,420	\$27,450	\$22,939
Industrial Truck and Tractor Operators (53-7051)	\$26,450	\$31,820	\$28,530	\$28,560	\$28,070	\$29,380	\$25,692
Construction and Related Workers (47-4099)	\$29,100	\$49,550	\$28,830	\$29,280	\$32,610	\$33,920	\$25,179
Automotive Service Technicians and Mechanics (49-3023)	\$30,310	\$39,140	\$32,480	\$34,290	\$34,050	\$33,630	\$31,391
Team Assemblers (51-2092)	\$24,840	\$24,410	\$28,620	\$26,700	\$25,940	\$28,330	\$24,878
Machine Tool Setters, Operators and Tenders (51-4081)	\$31,110	\$31,230	\$29,980	\$28,480	\$28,500	\$29,440	\$24,741

Sources: State data from Bureau of Labor Statistics May 2007 State Occupational Employment and Wage Estimates. Missouri Central Region data from Missouri Economic Research & Information Center, Occupational Employment Statistics May 2007 Occupational Employment and Wage Estimates

In the more advanced Computer and Engineering-Related occupations, salaries in the Missouri Central Region are decidedly lower than the State of Missouri in general and each of the five comparison states. Companies requiring Computer Programmers, Civil Engineers, Computer Systems Analysts or Industrial Engineering Technicians stand to save tens of thousands of dollars when hiring from the Missouri Central Region.

Region and State Salaries for Computer and Engineering Occupations (2007)							
Occupations and SOC Code	Arkansas	Illinois	Iowa	Kansas	Missouri	Nebraska	Missouri Central Region
Computer Programmers (15-1021)	\$64,640	\$74,260	\$58,960	\$65,380	\$65,280	\$63,700	\$53,654

Electrical and Electronic Engineering Technicians (17-3023)	\$43,160	\$55,140	\$49,360	\$50,500	\$51,280	\$46,230	\$50,004
Civil Engineers (17-2051)	\$65,810	\$75,310	\$70,800	\$70,130	\$74,560	\$72,900	\$65,171
Computer Systems Analysts (15-1051)	\$60,190	\$80,840	\$67,030	\$66,390	\$68,280	\$69,180	\$59,116
Industrial Engineering Technicians (17-3026)	\$41,550	\$47,580	\$45,850	\$50,940	\$44,850	\$46,700	\$36,050
Engineering Technicians (17-3029)	\$45,970	\$46,910	\$51,550	\$52,540	\$57,200	\$57,570	\$42,395

Sources: State data from Bureau of Labor Statistics May 2007 State Occupational Employment and Wage Estimates. Missouri Central Region data from Missouri Economic Research & Information Center, Occupational Employment Statistics May 2007 Occupational Employment and Wage Estimates

Note that the inherent savings in salaries and wage rates stated above do not take into account additional savings derived when hiring retired military or active military spouses, such as those who opt out of employer-sponsored benefits.

How do Missouri’s workers compensation and unemployment insurance rates compare to other states?

While Missouri’s Workers Compensation premium rate does not create savings for companies, its Unemployment Insurance rates make it highly competitive compared to other states. In 2008, Missouri’s Workers Compensation premium index rate was \$2.20, ranking it 28th in the Nation and higher than the rates found in most comparison states. Conversely, Missouri’s Unemployment Insurance minimum and maximum rates are a comparative benefit to companies, offering savings over Arkansas, Illinois and Kansas (states for which data was readily available).

Workers Compensation Costs (2008)		
State	Workers Compensation Premium Index Rates	National Ranking
Missouri	\$2.20	28
Arkansas	\$1.61	47
Kansas	\$1.77	42
Illinois	\$2.79	11
Nebraska	\$2.15	32

Source: Oregon Workers’ Compensation Study, 2008

Unemployment Insurance Costs (2006)		
State	Unemployment Insurance Minimum Rate	Unemployment Insurance Maximum
Missouri	0.00%	6.00%
Arkansas	0.10%	10.00%
Illinois	0.30%	8.10%
Kansas	0.07%	7.40%

Source: Missouri Economic Research & Information Center, 2009

What workforce development incentives are available in Missouri?

As in any state, new Missouri firms and those relocating to the State can take advantage of the Federal Work Opportunity Tax Credit program. This program provides an income tax credit to businesses that hire individuals from any one of nine targeted groups that have barriers to employment. One such group is Disabled Veterans of which the Fort Leonard Wood area has a disproportionate share.

At the State level, there are several robust workforce development training programs available to existing, new and relocating businesses. The Missouri Community College New Jobs Training Program and Job Retention Training Programs lower the cost of locating a new facility, or expanding a workforce in the State by providing funding for training. For existing businesses, this program reduces the cost associated with retraining incumbent workers. Eligible companies include those engaged in the manufacturing, processing or assembling of products; those that conduct research and development; and those that provide services of interstate commerce. Funding is available for specialized training for specific industry needs, adult basic education, on-the-job training and occupational skill training.

The Missouri Customized Training Program provides training assistance for both new and existing employees. Eligible businesses include those creating full-time jobs or those with training needs as a result of substantial capital investment. Training may include:

- New occupational skills required for technological advances or new product lines
- Quality and efficiency initiatives, such as Six Sigma, Lean Manufacturing and ISO certifications
- Targeted production skills, such as hydraulics, pneumatics and electronics

Missouri’s commitment to workforce development is also evident in the funds controlled by the State and the commitment of its Governor to use them. In 2008, Missouri’s Governor awarded nearly \$3 million in regional workforce grants as part of a Skilled Workforce Initiative. The initiative helped more than 17,000 Missourians develop technical and foundational competencies to prepare them for high-growth careers in industries that drive Missouri's economy. This same year, the Governor authorized the release of more than \$10 million in State assistance under the Missouri Job Development Fund to facilitate skill training for over 32,000 new and current employees in 244 companies.

How much does Missouri expect to receive for workforce development from the American Recovery Reinvestment Act of 2009?

While the final dollar amounts for workforce development through the American Recovery Reinvestment Act of 2009 have not yet been finalized by the U.S Congress, the expected apportionment of funds to Missouri for workforce development appears to far surpass the apportionment expected for contiguous states. It is estimated that Missouri could receive more than \$10.5 million to support its workforce development activities for adults and roughly another \$21 million to support dislocated worker activities, far more than most of the comparison states.

Workforce Development Funding in the American Recovery Reinvestment Act (FY2009)		
State	Estimated Additional State Grants for Adult Activities (WIA Title I-B)	Estimated Additional State Grants for Dislocated Worker Activities (WIA Title I-B)
Arkansas	\$5.12 million	\$6.06 million
Kansas	\$2.73 million	\$4.20 million
Iowa	\$1.57 million	\$4.21 million
Illinois	\$26.05 million	\$55.24 million
Missouri	\$10.59 million	\$20.82 million
Nebraska	\$1.25 million	\$2.09 million

*House/Senate Bill Estimates

Source: U.S. Congressional Research Services, February 2009

IX. QUALITY OF LIFE AND COST OF LIVING

How would one characterize the area's quality of life and its impact on employee relocation?

Quality of life is hugely important for companies dependent on the relocation of individuals from outside the area. Companies know that an attractive, affordable living environment encourages resident relocations and lessens the need for recruitment bonuses. This is particularly true for the sorts of individuals sought to serve as Fort Leonard Wood contractors or those who work to commercialize military technologies.

Numerous attributes influence quality of life. These include recreation/entertainment, shopping, housing, cost of living, education and safety. A sizable and growing number of Fort Leonard Wood area residents are, in fact, transplants accustomed to a greater array of amenities in their communities. Many have disposable incomes that would allow for more local, higher-end spending if such options were available. The Fort Leonard Wood area, however, has significant quality of life gaps. It lacks sufficient cultural and arts amenities, organized recreation, high end shopping and hobby/crafts. And its restaurant community is growing but still has a shortage of fine dining establishments. These shortfalls are cited repeatedly by area residents, Fort Leonard Wood personnel and others. They were most clearly and most recently outlined in a 2007 quality of life survey performed by the Waynesville-St. Robert Chamber of Commerce.

In today's "creative class" world in which younger, skilled workers expect the places they live to have diverse entertainment and activities, these gaps present a challenge for attracting talent to the area. But quantifiable data on cost of living, cost of housing and public education quality reflect the relative affordability of the Fort Leonard Wood area that, to some degree, may help mitigate deficiencies in other quality of life areas.

What quality of life assets does the area possess?

The Fort Leonard Wood area's attractiveness as a place to live is growing among retirees, especially military retirees. According to Fort Leonard Wood representatives, far more base retirees remain in the area upon retirement today than a decade ago. Several factors contribute to the Fort Leonard Wood area's appeal to military retirees. Chief among them are access to inexpensive goods and services at the Commissary, exceptional medical care offered at Fort Leonard Wood supporting retiree medical benefits, and a scenic setting in which to reside.

The area has exceptional natural beauty with a plethora of outdoor activities. Its spectacular wooded countryside -- particularly the Mark Twain National Forest and the Gasconade River, Big Piney River and Roubidoux Creek waterways -- hold tremendous appeal to outdoor enthusiasts. Other attractions include underwater caves, golf courses, and numerous locations for camping, floating, hunting and fishing. Proximity to Lake of the Ozarks and its many amenities is also a huge draw.

A variety of housing is available, ranging from executive housing to homes for low to moderate income individuals. Housing options feature numerous residential developments in a variety of settings, ranging from rural/secluded, self-contained subdivisions, and subdivisions located within communities' corporate limits. From a site selection standpoint, variety and quantity of housing options (including rental properties and single family homes) are important to attracting and retaining employees.

How affordable is the Fort Leonard Wood area as a place to live?

The Fort Leonard Wood area offers a competitive to slightly higher than average cost of living. Aggregate living costs in the area are lower than the Missouri average, but higher than those of competing locations in neighboring states. Housing costs are moderate overall but considerably higher in the area's primary cities. And property tax rates are relatively low by comparison.

Cost of Living and Housing (Missouri Locations)			
Area	Cost of Living Index (2008)	Median House/Condo Value (2007)	Median Property Tax Rate for Housing Units (2000)
City of Lebanon	78.2	\$103,990	0.7%
City of Rolla	81.4	\$119,491	0.6%
City of St. Robert	79.4	\$119,618	0.8%
City of Waynesville	78.3	\$136,783	0.6%
Laclede County	78.7	\$113,027	0.6%
Phelps County	79.8	\$116,507	0.6%
Pulaski County	78.7	\$113,750	0.7%
FLW Area	80.3	\$103,079	0.5%
City of Kansas City	78.7	\$135,500	1.2%
City of St. Louis	82.4	\$128,300	0.8%
Missouri	90.3	\$138,600	1.0%

Source: City-data.com, 2009

Cost of Living and Housing (Locations in Competing States)			
Area	Cost of Living Index (2008)	Median House/Condo Value (2007)	Median Property Tax Rate for Housing Units (2000)
Bentonville, AR	85.6	\$160,214	0.8%
Forest City, AR	82	\$82,621	0.6%
Galesburg, IL	76.3	\$98,196	1.5%
Quincy, IL	75.1	\$91,992	1.6%

Boone, IA	76.1	\$93,831	1.4%
Newton, IA	77.5	\$111,612	1.6%
Junction City, KS	78.2	\$91,392	1.5%
Ottawa, KS	78.4	\$100,716	1.6%

Source: City-data.com, 2009

When asked during a survey (Growth Services, 2005) to rate the factors that make the Fort Leonard Wood area appealing to prospective relocatees, local businesses identified quality of education as number one. Other factors rated as strengths were fair and equitable taxes, career and personal development, community acceptance, medical services, housing and cost of living.

X. EMPLOYER TESTIMONIALS

According to employers, the supply of trained and trainable workers in the Fort Leonard Wood area far exceeds the demand. Yet this is not readily apparent unless one operates a business within the region. They characterize employees as hard working with deeply rooted, Midwestern values, and use descriptive terms including “dependable,” “trustworthy,” “loyal” and “ready to work.”

In 2005, Growth Services surveyed 80 Fort Leonard Wood area firms regarding the quality of the local labor force. Businesses were asked to rate 12 labor quality characteristics on a scale of 1 (very poor) to 5 (very good). Respondents, on average, rated the labor force between 3.5 and 4 (above average) in most of the 12 characteristics-- Drug Avoidance, Reliability, Productivity, Worker Attitudes, Work Ethic, Calculation Competency, Problem Solving and Reading/Writing Competency. Non-Skilled Worker Availability and Technical Competency received ratings of 3.48 and 3.4 respectively.

Listed are some of the employer comments provided to the Prager Team during the Labor Asset Report interview process.

“The labor force opportunities in the area are unlimited. In reality, the opportunities simply have not yet been tapped. The caliber of the workforce is beyond comprehension. There are a lot of highly skilled, dedicated, disciplined, ethical individuals who give you more than a full day’s work for a full day’s pay.”

Riley “Hondo” Wooten, Vice President, Nitar, L.L.C.
St. Robert, MO
(Consultation, training and professional services to the U.S. Army)

“Absolutely the workforce is available here. The people are dependable with high values. And this is a comfortable community. These are some of the reasons a company should move here.”

Warren Noll, Manager
21st Century Systems, Inc.
St. Robert, MO
(Intelligent software systems design)

“There are a lot of people in the community I would love to hire, but I don’t have positions for them. There are plenty with the right experience and ethics. There are people here who have the talent and high level technical skills for a small technology company as well as those qualified to man the lines of a manufacturing company. The workforce is versatile, abundant and good.”

Ted Day, President
Mo Sci Corporation
Rolla, MO
(Precision glass technology)

“We are able to quickly identify five to 10 candidates for any employment opportunity, including high-tech oriented positions. If there was a company that required 50 IT professionals or engineers, we could fill them all within six months.”

Joe Coonrod, President of Express Personnel Services
Rolla, MO
(Employment service)

“The people who come to Fort Leonard Wood are usually here because they’re at the apex of their career. These are the folks who enter the workforce. With their management skills, many could run organizations or offices in any industry, no matter the product or service. The work that a company may ask them to do will not approach what they have already done. They are fantastic employees.”

Bill Rostad, President and CEO, Nitar, L.L.C.
St. Robert, MO
(Consultation, training and professional services to the U.S. Army)

“Fort Leonard Wood retirees are driven, challenge-seeking, Type A personalities. They are well grounded and come with a set of values any company would like to have. They are good citizens and role models with strong management and leadership ability in addition to their technical skills. They give you more than what is asked for.”

Robert Gunter, Concurrent Technologies Corporation
St. Robert, MO
(Defense technology services)