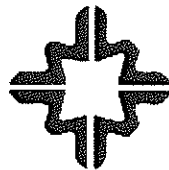


**THE
EAST CENTRAL INDIANA
WESTERN AREA
LABOR AVAILABILITY REPORT**

November, 2012

Compiled and Prepared by



THE PATHFINDERS

www.thepathfindersus.com

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INTRODUCTION

The Pathfinders has employed its many years of experience in workforce assessments for corporate site-selection clients and civilian workforce assessments for the Department of Defense in locations that faced military base closures to produce this evaluation of the East Central Indiana Western area workforce. In site-selection projects, the question that most often drives the search is whether the candidate location has the workforce needed for a new or expanding operation. When considering the workforce of a possible location, a prospect basically wants to know:

- Can I find the workers I need in this location?
- Do these workers have any skills and/or experience that pertain to my operation?
- How much will these workers cost?

Consequently, an analysis of an area's workforce became a key component of site searches conducted by The Pathfinders. The report that follows was developed as a tool for economic development officials for use in business recruitment and workforce development efforts. Senior human resources executives from among corporate clients assisted in refining the methodology and report format.

With regard to labor availability, while unemployed workers are a source considered in hiring, companies typically also staff a new operation with individuals who are working but who desire better jobs and who appear to possess the skills, education, and experience to qualify them for those better jobs. **By that definition**, those individuals can be considered "underemployed" and are identified as such in this report.

The Pathfinders was retained to quantify the extent to which both unemployment and underemployment exist in the East Central Indiana Western area. This report also represents the objective and professional view of The Pathfinders with regard to workforce quality, availability, costs, experience and skills that a new or expanding employer can expect in the East Central Indiana Western region.

The information presented in this report has been developed independently of the client, and the client has not influenced the findings.



KEY FINDINGS

- **The East Central Indiana Western area, referred to in this report as the “labor shed”, has a household population of approximately 431,000; a civilian labor force of approximately 195,600; and a pool of approximately 19,100 unemployed persons who are actively seeking work.**
- **The results of this survey indicate that a new or expanding employer will be able to attract employees from an additional pool of about 31,800 underemployed workers.**
- **The median current pay rate of the underemployed workers in the labor shed is \$13.13 per hour, and their median desired pay rate is \$15.53 per hour.**
- **Survey results indicate that the underemployed workers in the labor shed have high levels of experience and skills in office operations and warehousing/logistics.**
- **Results indicate that underemployed workers are willing to commute an average of 29 miles to a new job, in contrast to their current average commute of 16 miles.**
- **Survey results indicate 2% of the underemployed and 9% of unemployed, actively seeking work individuals in the labor shed have less than a high school degree.**
- **The median desired pay rate of the unemployed workers who are actively seeking work is \$11.90 per hour.**
- **In total, the East Central Indiana Western area has approximately 50,900 available workers for new or expanding businesses.**



METHODOLOGY

The first step in assessing the workforce of the East Central Indiana Western area was to determine the boundaries of the area to be assessed. To accomplish this task, The Pathfinders applied the same reasoning that would be used during a site search for a corporate client considering the area as a potential location. The East Central Indiana Western survey area includes those locations from which workers might be drawn to a new employer and is referred to in this report as the "labor shed". This labor shed consists of Blackford, Delaware, Grant, Henry, Jay, Madison and Randolph Counties in Indiana.

A map of the East Central Indiana Western labor shed is included on the following page.

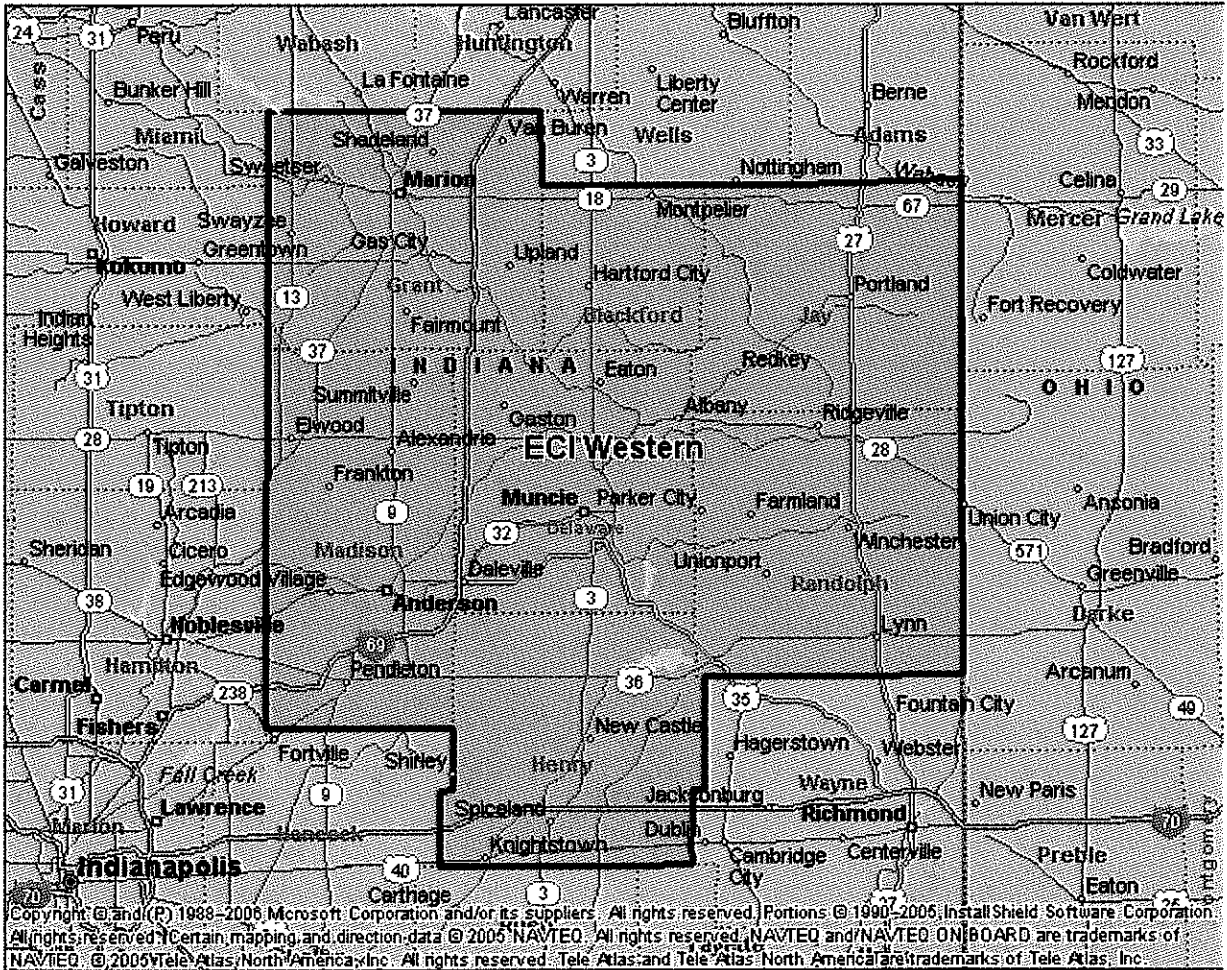
Selected online resources were used in this project. Additionally, The Pathfinders conducted interviews with individuals throughout the East Central Indiana Western region. Those individuals were proportionally stratified across age, household income, and zip codes. The purpose of these surveys was to ascertain availability for work with a new employer; determine desired pay rates; and, collect information on such factors as age, education, commuting patterns, experience, and skills.

The data obtained as a result of those interviews enabled The Pathfinders to apply and employ a proprietary methodology that accurately determined the existence of underemployment and the quality and characteristics of both the underemployed and unemployed workers in the area. Further, The Pathfinders applied a proprietary process to the analysis of the data to correct for invalid responses. For example, those persons indicating they would take a new job but also indicating the desire for increased or decreased pay that is unreasonable are not included in the results.

It is important to note that companies making location decisions based upon these surveys have reported that when staffing actually began, the numbers reported by The Pathfinders proved to be accurate.



MAP OF THE EAST CENTRAL INDIANA WESTERN LABOR SHED



NUMBER OF AVAILABLE WORKERS

The East Central Indiana Western Area Labor Shed

The East Central Indiana Western area labor shed has a household population of approximately 431,000. The civilian labor force numbers approximately 195,600, and the labor shed contains approximately 19,100 unemployed people who are actively seeking work.

The results of this assessment determined that approximately 31,800 workers can be defined as underemployed: those individuals who are currently working but would take a better job if offered by a new or existing employer and who appear to possess the skills, education, and experience to qualify them to do so. Together with the unemployed, actively seeking work individuals, the East Central Indiana Western area has approximately 50,900 available workers for new or existing employers.

TOTAL AVAILABLE WORKERS

Number of underemployed workers	31,800
Number of unemployed, actively seeking work individuals	19,100
Total Number of Workers Available for Employers*	50,900

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



ASSESSMENT OF THE UNDEREMPLOYED WORKFORCE
The East Central Indiana Western Area Labor Shed

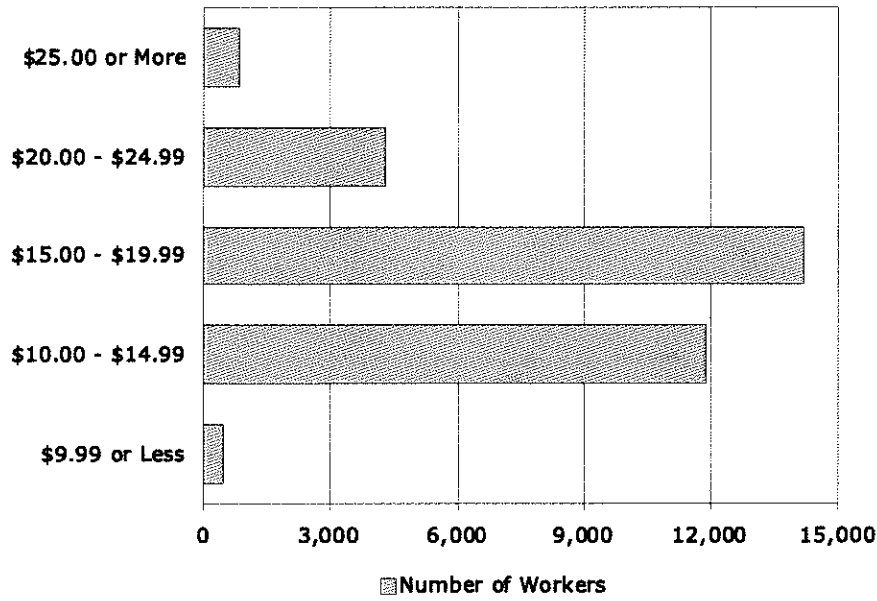
The 31,800 underemployed workers identified in this report might also be termed “upgraders”. They desire to move into an upgraded job and appear to possess the skills, education, and experience to enable them to do so. The following charts represent the desired pay rates of the underemployed individuals in the labor shed. Desired wages are shown by specific rates, range and percentiles.

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

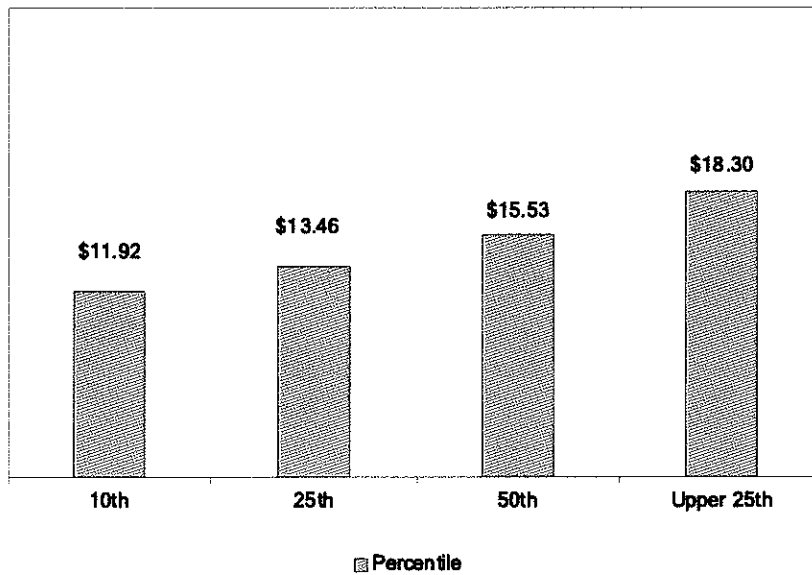
Desired Pay Rate	Number Available
\$9.99 or Less	500
\$10.00 - \$11.99	2,800
\$12.00 - \$13.99	6,700
\$14.00 - \$15.99	9,000
\$16.00 - \$17.99	4,300
\$18.00 - \$19.99	3,300
\$20.00 - \$21.99	1,900
\$22.00 - \$23.99	1,900
\$24.00 - \$25.99	500
\$26 or More	900



DESIRED WAGE RATES PER HOUR BY RANGE
31,800 Underemployed Workers



DESIRED WAGE RATES PER HOUR BY PERCENTILE
31,800 Underemployed Workers



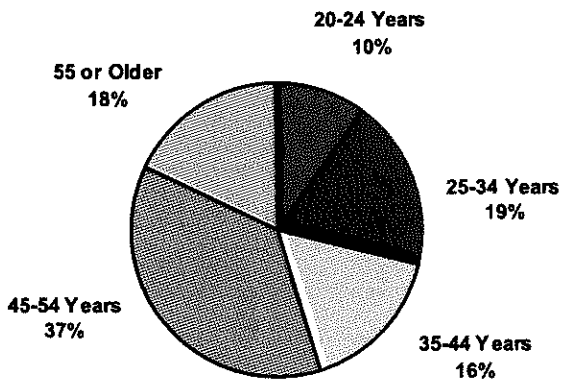
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

The East Central Indiana Western Area Labor Shed

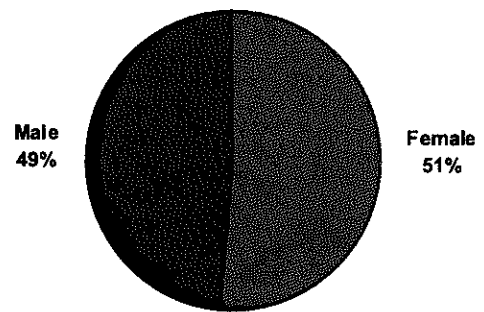
31,800 Underemployed Workers

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

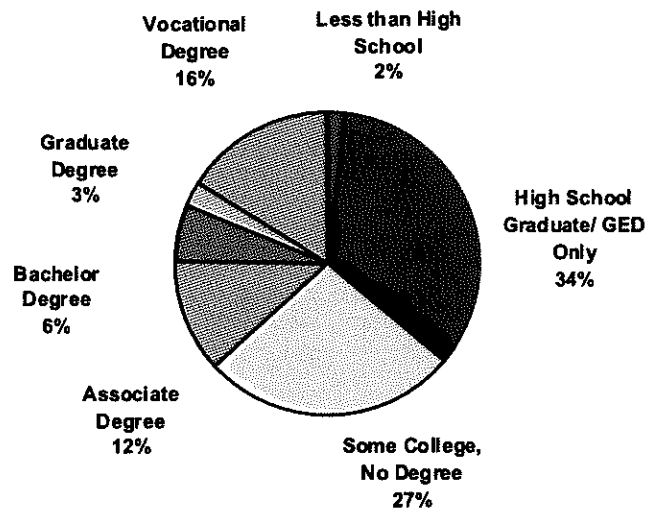
AGE - Average 43 Years



GENDER

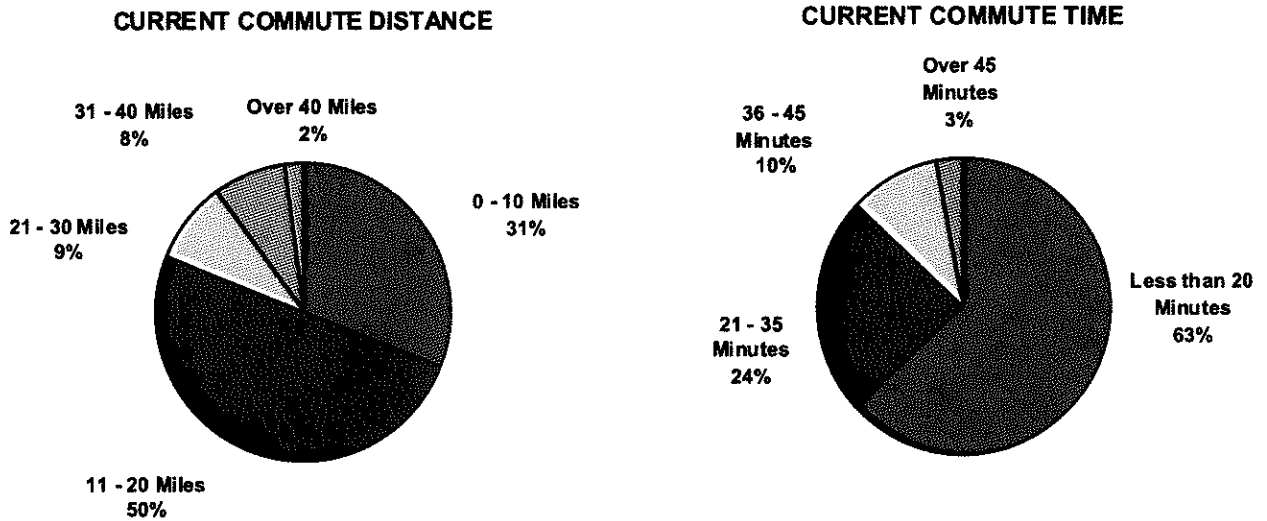


EDUCATION



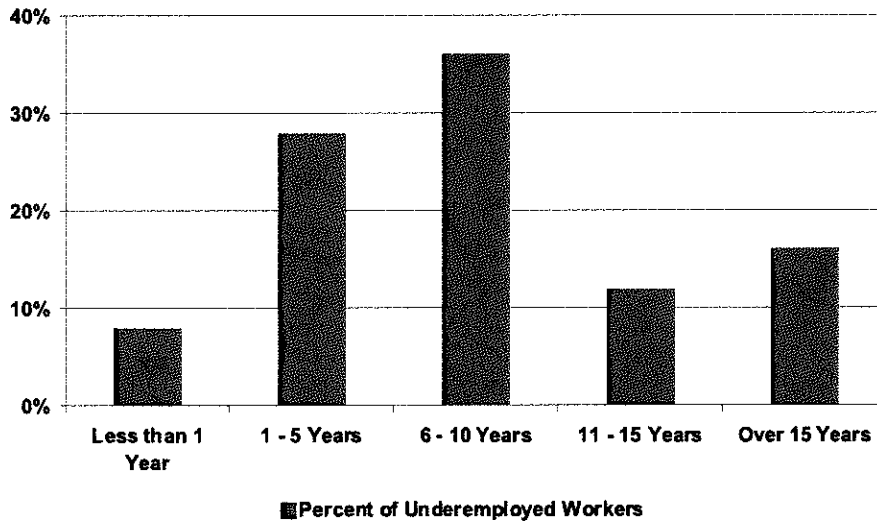
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

31,800 Underemployed Workers



The average commute time of the underemployed workers in the labor shed is 23 minutes, and the average current commute distance is 16 miles.

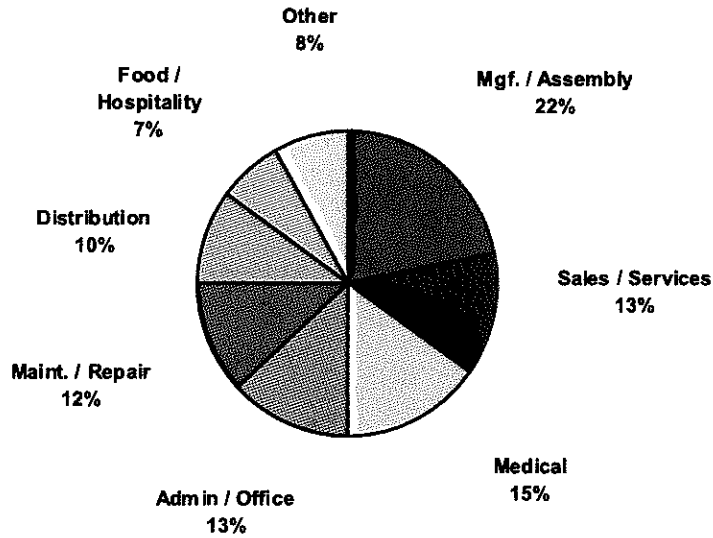
LENGTH OF TIME IN CURRENT JOB



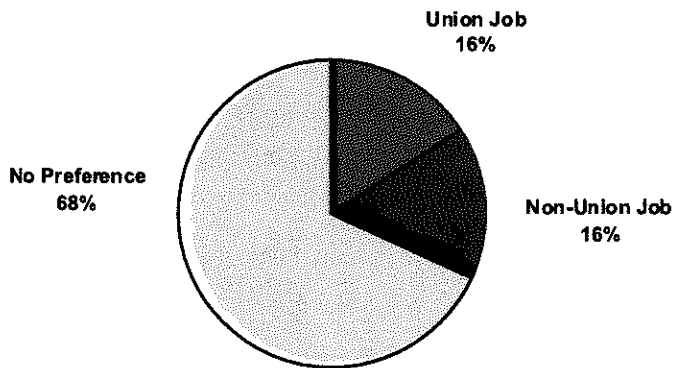
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

31,800 Underemployed Workers

CURRENT AREA OF EMPLOYMENT

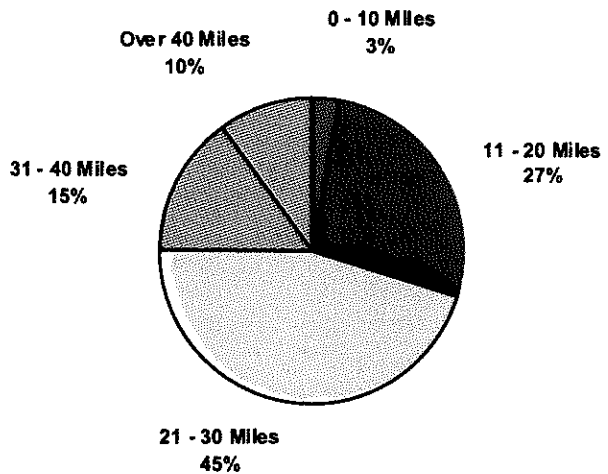


UNION PREFERENCE



MILES WILLING TO COMMUTE

Average 29 Miles



EXPERIENCE AND SKILLS – UNDEREMPLOYED WORKERS

31,800 Underemployed Workers

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

- manufacturing, assembly, fabrication or other industrial operations;
- back office, data processing, call centers, information technology, customer service or sales operations;
- distribution or transportation operations; and,
- biotechnology, pharmaceuticals or medical research operations.

The experience and skills categories are purposefully similar in order to present the most accurate worker availability for operations in one of those four groups and are designed to ensure inclusiveness considering the multitude of tasks and job titles present in most business, government and institutional operations.

The experience charts report the approximate number of underemployed workers experienced in each category. The charts also give the percentage of the total number of underemployed experienced in each category and the average number of years of experience in each category.

Likewise, for the skills categories, the charts illustrate the approximate number of underemployed workers in the labor shed who are skilled in each of the categories and the percent of the total underemployed. Additionally, an accompanying chart illustrates the percentage of the total underemployed workers in the labor shed who are skilled in each category and the percent of those who use each category of skills in their current jobs.

It should be noted that individuals polled normally have experience and skills in multiple categories; therefore, the category number of workers will not total to the number of underemployed, nor will the percentages equal 100%.



EXPERIENCE OF UNDEREMPLOYED WORKERS
31,800 Underemployed Workers

Experience Category	Number of Workers*	Percentage of Total
Office Operations	20,000	63%
Customer Service	16,500	52%
Warehouse/Distribution/Transportation	15,300	48%
Manufacturing/Assembly/Fabrication	13,700	43%
Information Technology	12,400	39%
Maintenance/Installation/Repair	11,400	36%
Sales	8,600	27%
Telecommunications	7,600	24%
Medical/Health Sciences	7,600	24%
Call Center	4,800	15%

* Rounded

Experience Category	Average Years of Experience
Maintenance/Installation/Repair	11
Warehouse/Distribution/Transportation	10
Customer Service	9
Manufacturing/Assembly/Fabrication	9
Office Operations	9
Sales	8
Information Technology	7
Medical/Health Sciences	7
Telecommunications	3
Call Center	3



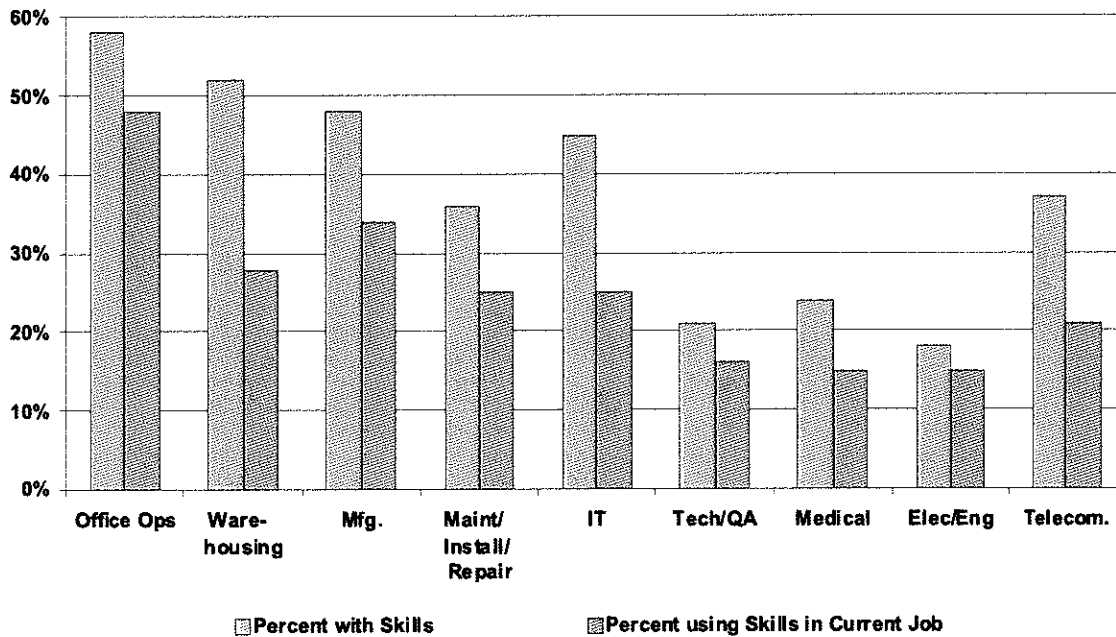
SKILLS OF UNDEREMPLOYED WORKERS

31,800 Underemployed Workers

Skills Category	Number of Workers*	Percentage of Total
Office Operations	18,400	58%
Warehouse/Logistics	16,500	52%
Manufacturing/Assembly/Fabrication	15,300	48%
Information Technology	14,300	45%
Telecommunications	11,800	37%
Maintenance/Installation/Repair	11,400	36%
Medical/Health Sciences	7,600	24%
Technician/Quality Assurance	6,700	21%
Electronics/Engineering	5,700	18%

* Rounded

SKILLS USED IN CURRENT JOB



The survey respondents were asked to identify the one category of experience in which they felt they were most experienced and, also, the single skills category in which they believed themselves to be most skilled. The charts below reflect the results of these questions.

CATEGORY OF MOST EXPERIENCE

Experience Category	Percentage of Respondents
Office Operations	25%
Manufacturing/Assembly/Fabrication	19%
Warehouse/Distribution/Transportation	18%
Medical/Health Sciences	12%
Customer Service	11%
Maintenance/Installation/Repair	9%
Sales	2%
Information Technology	2%
Call Center	2%

CATEGORY OF MOST SKILLED

Skills Category	Percentage Of Respondents
Office Operations	31%
Warehouse/Logistics	19%
Manufacturing/Assembly/Fabrication	16%
Medical/Health Sciences	13%
Maintenance/Installation/Repair	8%
Electronics/Engineering	6%
Technician/Quality Assurance	3%
Information Technology	2%
Telecommunications	2%

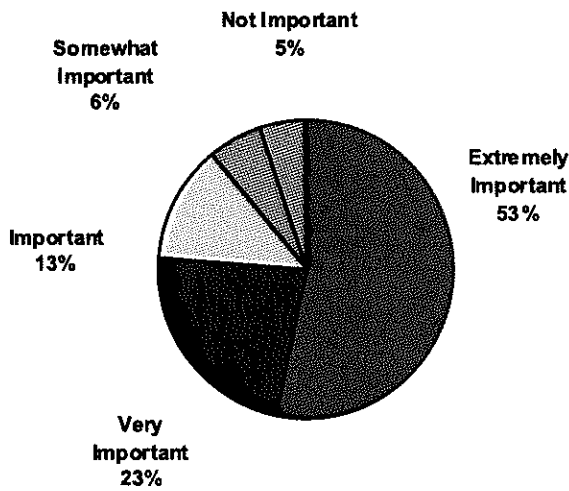


FACTORS AFFECTING JOB DESIRABILITY

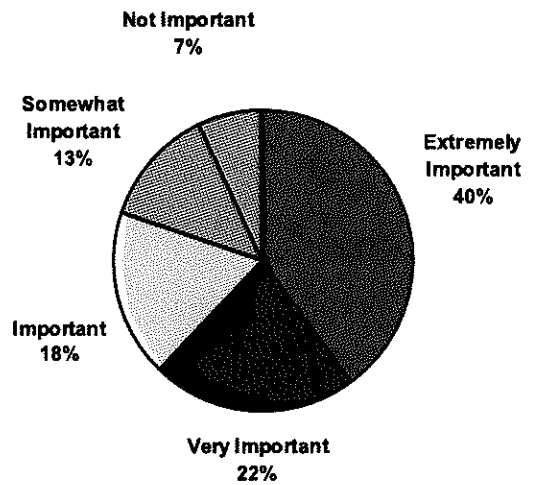
31,800 Underemployed Workers

In an effort to identify those factors most important to the East Central Indiana Western area's underemployed workers relative to consideration of an employer's desirability and a potential job change, the respondents were asked to rate the following job factors from "extremely important" to "not important".

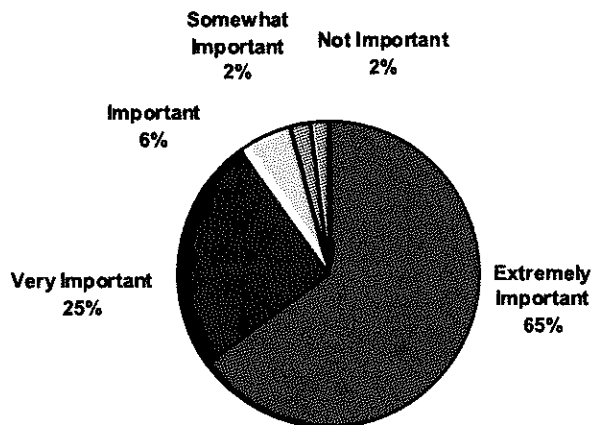
SALARY



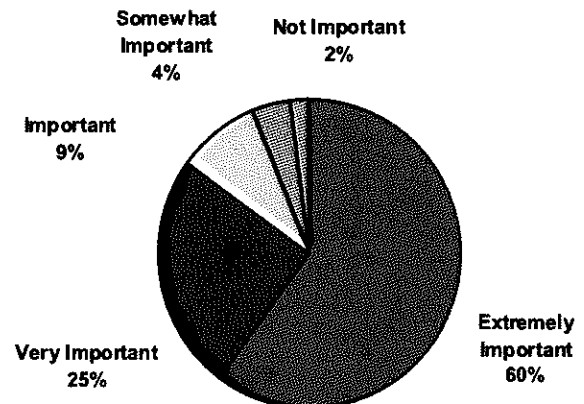
LOCATION



INSURANCE BENEFITS



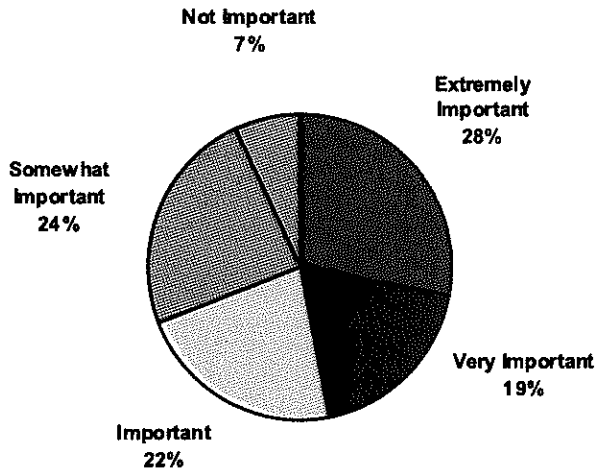
RETIREMENT BENEFITS



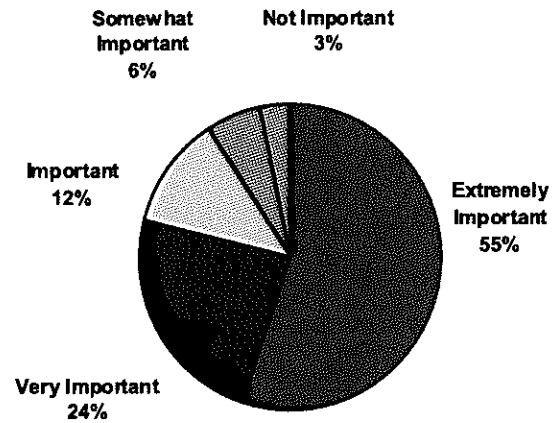
FACTORS AFFECTING JOB DESIRABILITY

31,800 Underemployed Workers

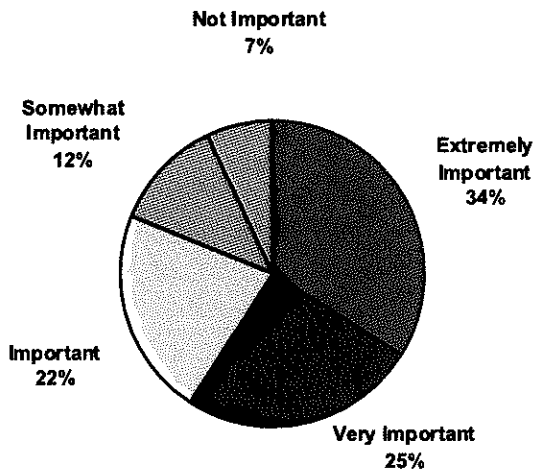
PHYSICAL WORKING ENVIRONMENT



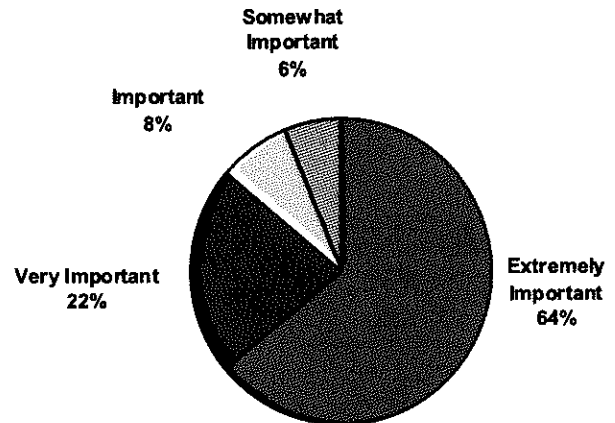
PAID TRAINING PROGRAMS



FLEXIBLE WORK SCHEDULE



OPPORTUNITY FOR ADVANCEMENT

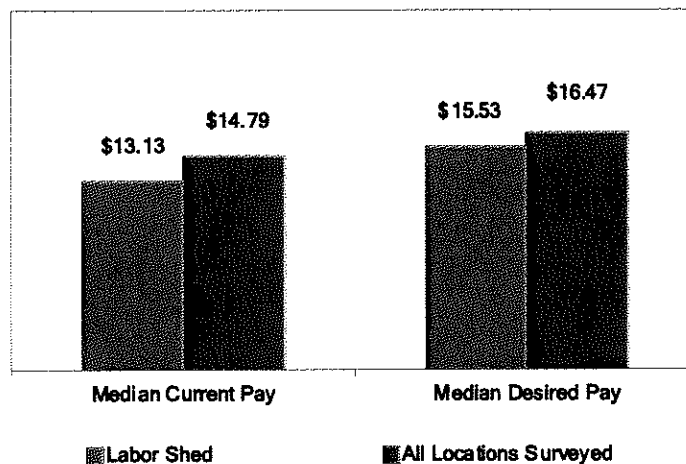


NATIONAL COMPARISONS OF UNDEREMPLOYED WORKFORCE

This section of the report provides comparisons of the pay rates, experience and skills of the labor shed's underemployed workforce with the underemployed workforces in other areas previously surveyed by The Pathfinders. A prospect company considering the East Central Indiana Western region as a location will judge its workforce on a comparative basis. The comparative data for other locations used in the following charts reflect information accumulated over the past eighteen months. The Pathfinders maintains a continuing database of over 700 surveyed counties and communities and more than 30 million workers. In the charts, the East Central Indiana Western region is referred to as "labor shed".

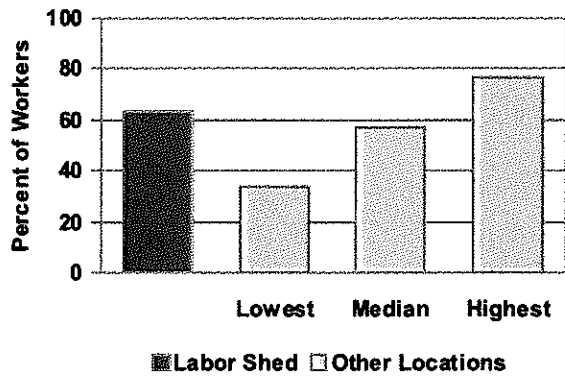
The chart below illustrates the median current and desired wages of the underemployed workers in the East Central Indiana Western labor shed as compared to those underemployed workers in all locations surveyed by The Pathfinders over the past eighteen months. As indicated, the median current pay of all surveyed, underemployed workers over the past eighteen months is \$14.79 per hour, and the median desired pay of these workers is \$16.47 per hour. As shown, survey results indicate that the East Central Indiana Western region's underemployed workers have lower pay rates in both median current pay and desired pay than other locations surveyed.

COMPARISON OF MEDIAN CURRENT / DESIRED WAGES (per hour)

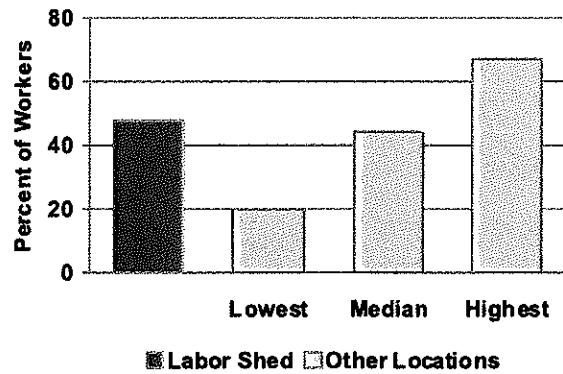


**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The East Central Indiana Western Area /
Locations Surveyed Over the Past 18 Months**

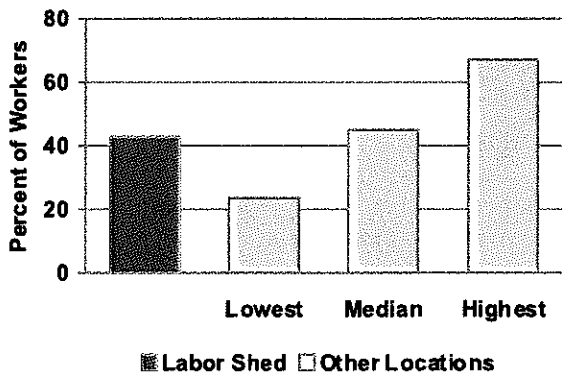
OFFICE



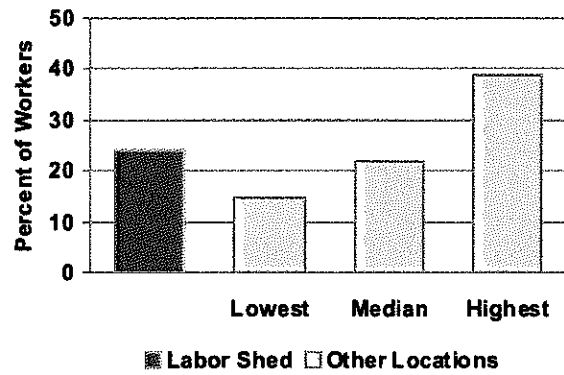
**WAREHOUSE / DISTRIBUTION /
TRANSPORTATION**



**MANUFACTURING / ASSEMBLY /
FABRICATION**



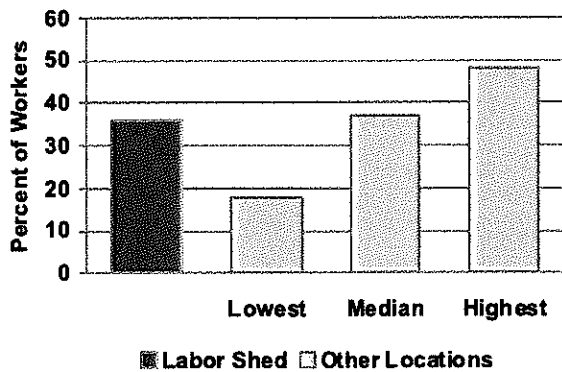
**MEDICAL /
HEALTH SCIENCES**



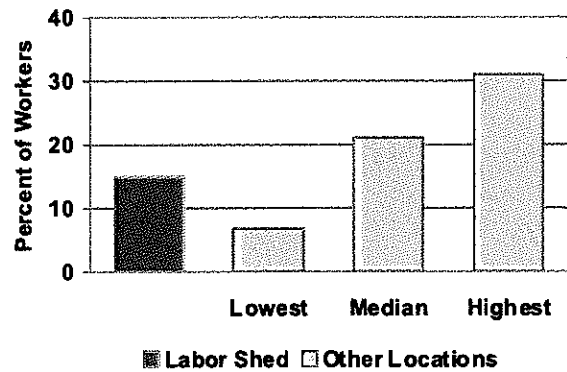
**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS**

**The East Central Indiana Western Area /
Locations Surveyed Over the Past 18 Months**

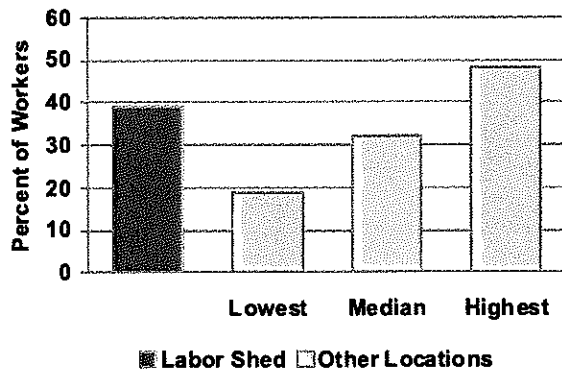
**MAINTENANCE /
INSTALLATION / REPAIR**



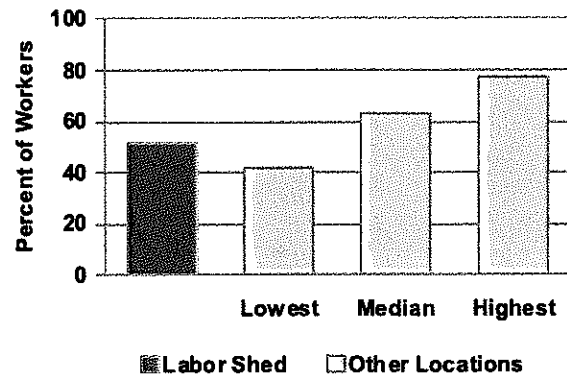
CALL CENTER



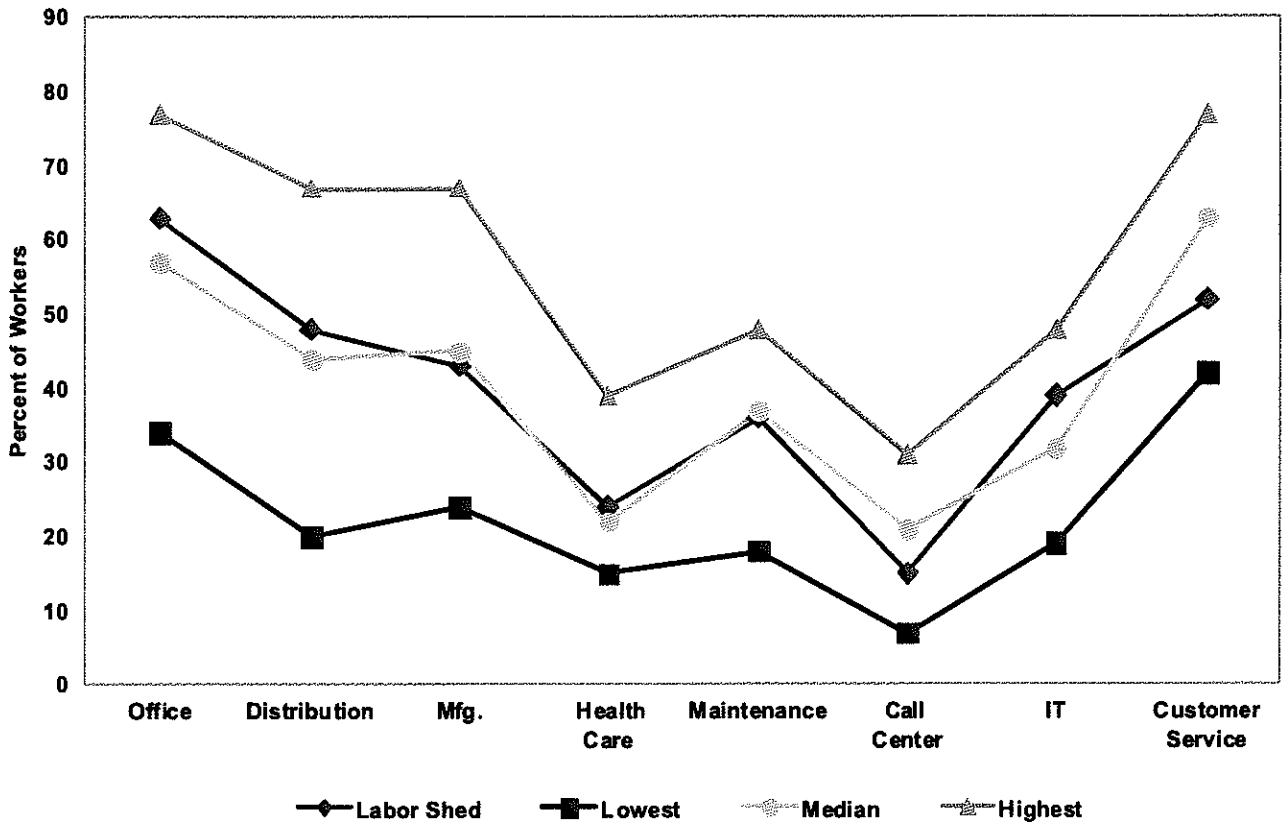
INFORMATION TECHNOLOGY



CUSTOMER SERVICE

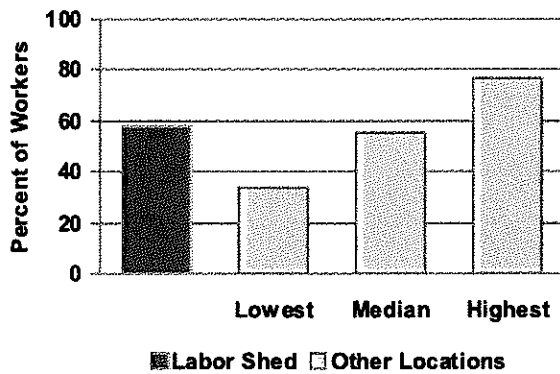


**SUMMARY COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The East Central Indiana Western Area /
Locations Surveyed Over the Past 18 Months**

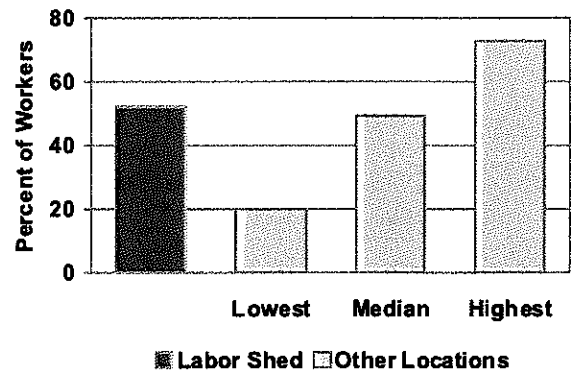


**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The East Central Indiana Western Area /
Locations Surveyed Over the Past 18 Months**

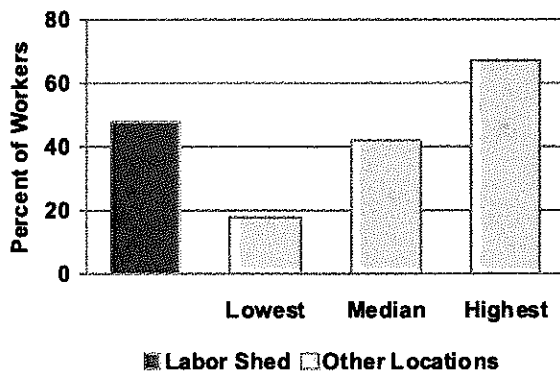
OFFICE



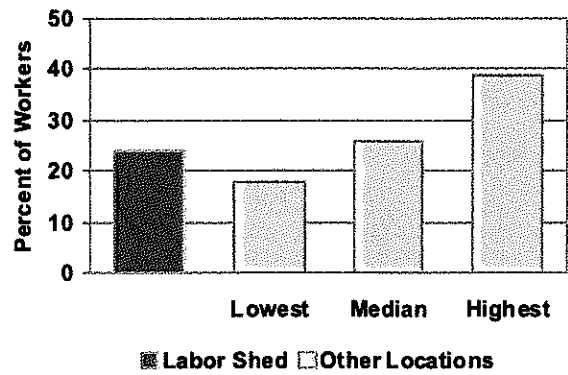
**WAREHOUSE /
LOGISTICS**



**MANUFACTURING / ASSEMBLY /
FABRICATION**

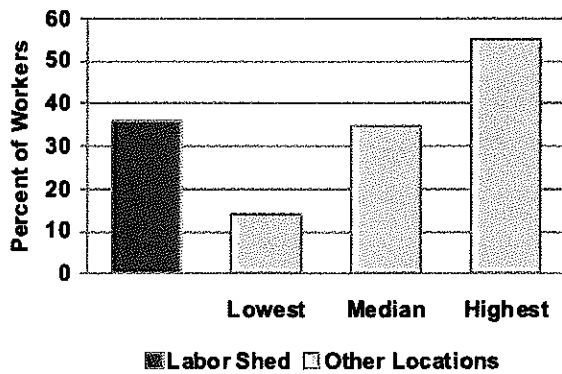


**MEDICAL /
HEALTH SCIENCES**

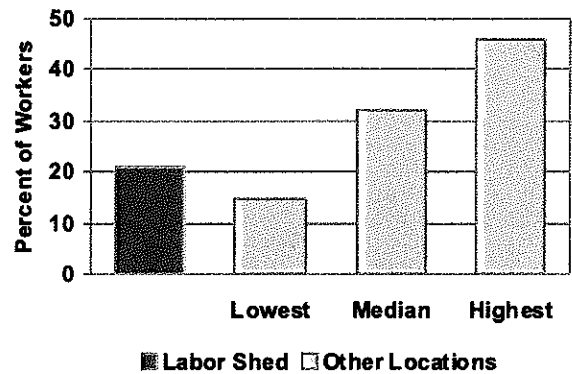


**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The East Central Indiana Western Area /
Locations Surveyed Over the Past 18 Months**

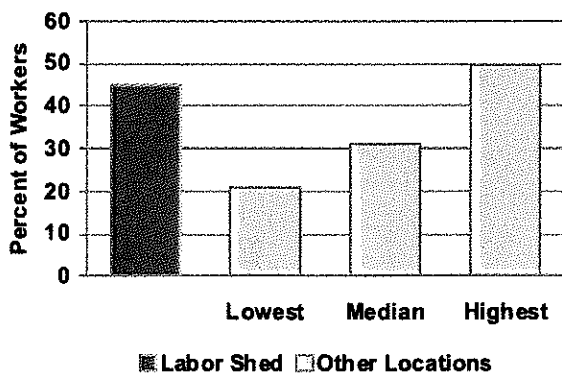
**MAINTENANCE /
INSTALLATION / REPAIR**



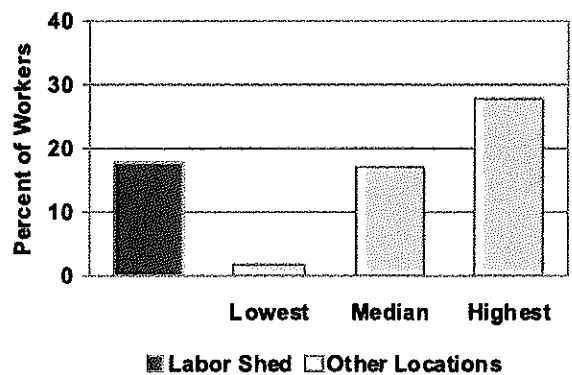
**TECHNICIAN / QUALITY
ASSURANCE**



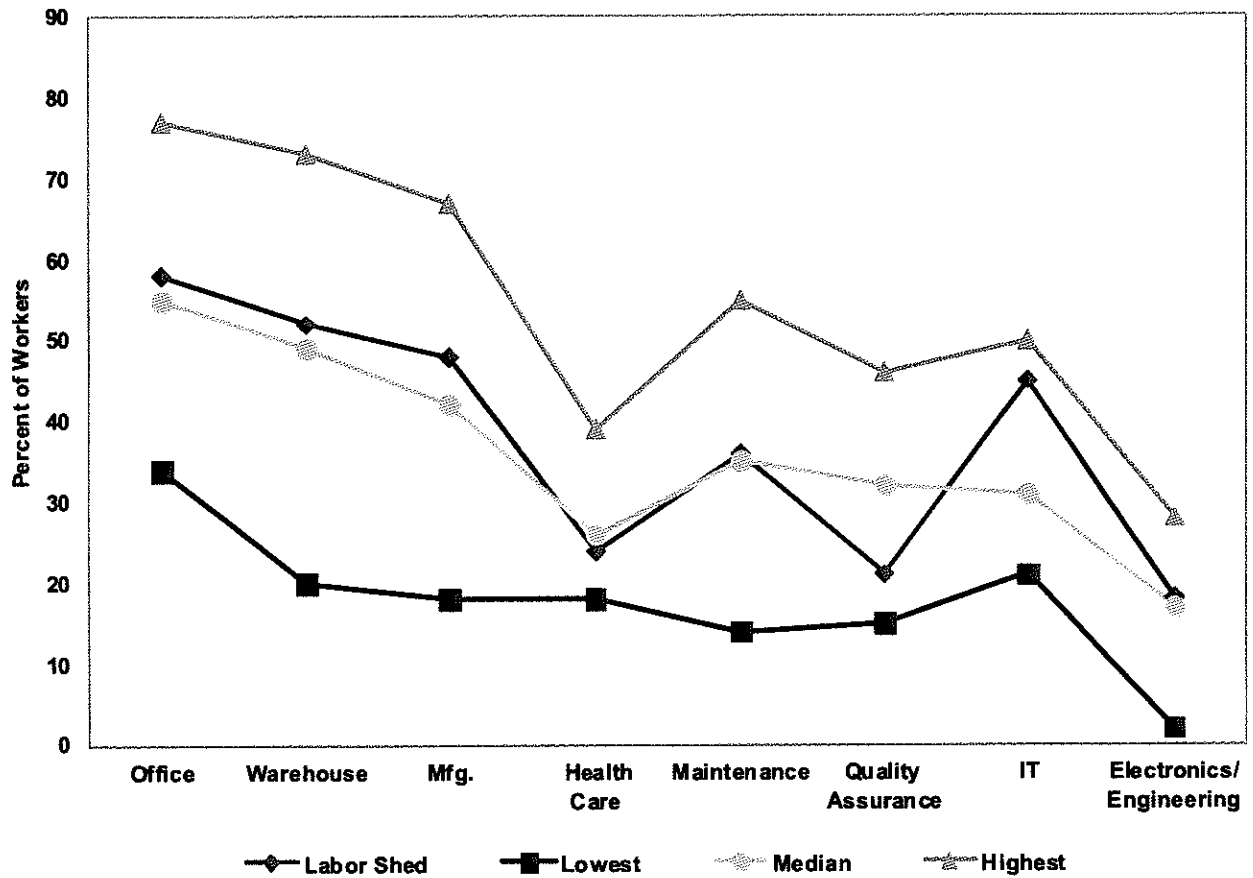
INFORMATION TECHNOLOGY



**ELECTRONICS /
ENGINEERING**



**SUMMARY COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The East Central Indiana Western Area /
Locations Surveyed Over the Past 18 Months**

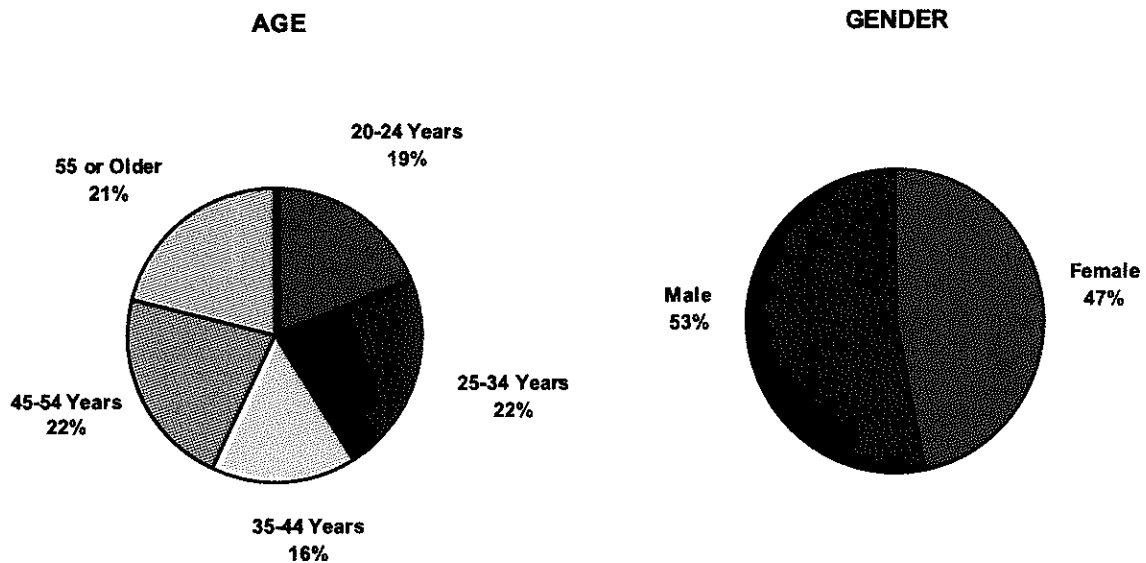


**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK**

19,100 Workers

According to survey results, the following charts provide information on those unemployed workers in the labor shed who are actively seeking work. **As these data relate solely to those individuals in the labor shed who are unemployed, they will vary from data representative of the population and civilian labor force as a whole.**

In the East Central Indiana Western labor shed, according to published sources, there are approximately 19,100 individuals who are actively seeking work. Survey results indicate the average age of these individuals is 40 years.



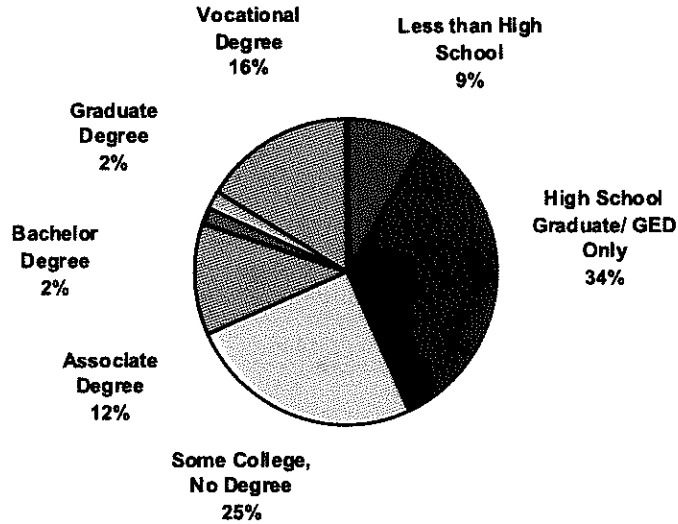
The median desired pay rate of the individuals who are unemployed, actively seeking work is \$11.90 per hour. These available workers have been out of the workforce for an average of 20 weeks and are willing to commute an average of 26 miles for a job.



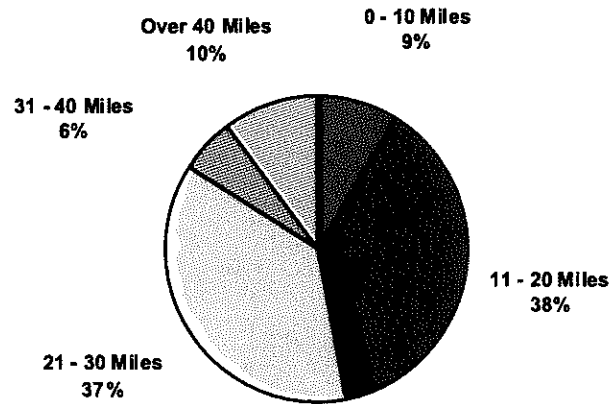
**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK**

19,100 Workers

EDUCATION



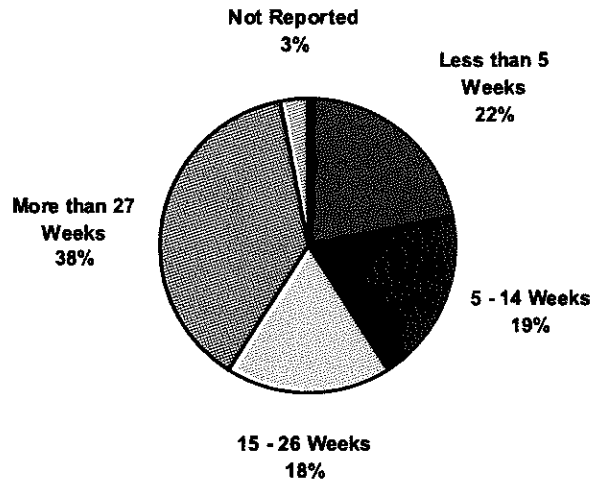
MILES WILLING TO COMMUTE – Average 26 Miles



**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK**

19,100 Workers

**WEEKS OUT OF WORKFORCE
Median 20 Weeks**



REASON FOR BEING OUT OF WORKFORCE

REASON	Percentage of Respondents
Laid Off / Job Eliminated	50%
No Jobs / Discouraged	16%
Company Closed / Relocated	10%
Personal Choice / Stay-At-Home	9%
Medical/Disability	9%
Student	6%



**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK**

19,100 Workers

Experience Category	Number of Individuals*	Percentage of Total	Average Years of Experience
Manufacturing/Assembly/Fabrication	10,700	56%	8
Warehouse/Distribution/Transportation	10,100	53%	5
Customer Service	8,400	44%	5
Maintenance/Installation/Repair	6,500	34%	5
Sales	5,900	31%	5
Office Operations	5,400	28%	6
Telecommunications	4,800	25%	3
Information Technology	4,200	22%	3
Medical/Health Sciences	2,500	13%	10
Call Center	2,500	13%	3

It should be noted that individuals polled normally have experience and/or skills in multiple categories.

Skills Category	Number of Individuals*	Percentage of Total
Warehouse/Logistics	11,300	59%
Manufacturing/Assembly/Fabrication	8,400	44%
Office Operations	8,400	44%
Maintenance/Installation/Repair	5,300	28%
Telecommunications	4,800	25%
Technician/Quality Assurance	4,200	22%
Medical/Health Sciences	4,200	22%
Electronics/Engineering	4,200	22%
Information Technology	4,000	21%

* Rounded



EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE

In developing a profile of existing workers in the East Central Indiana region, The Pathfinders considered such factors as labor availability, productivity, attitudes, costs, and education. The analysis was based upon interviews conducted with senior management and human resources professionals from companies located in the labor shed.

As determined from the employer interviews, the tables below reflect the top five methods used to recruit hourly and salaried workers in the East Central Indiana region and the percent of employers utilizing each method. Employers may use multiple recruitment methods.

RECRUITMENT METHODS

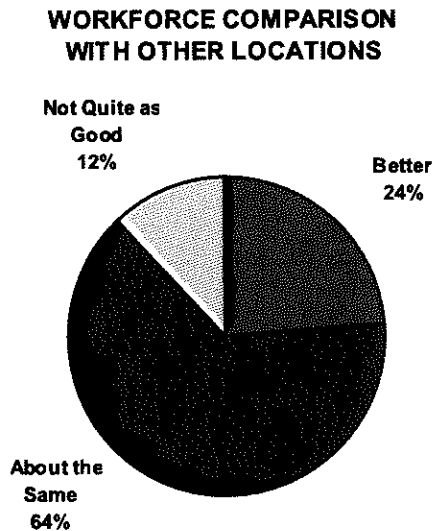
Recruiting Methods – Hourly Workers	% of Employers
Word of Mouth	42%
Staffing/Temp Agency	28%
Job Board/Sign	28%
Newspaper Ads	26%
Referrals	23%

Recruiting Methods – Salaried Workers	% of Employers
Internet	36%
Word of Mouth	26%
Newspaper Ads	25%
Recruiters	21%
Job Board/Sign	21%



EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE

49% of the employers interviewed stated their companies had operations in other regions of the United States. Of these employers, those familiar with the workforces in those other locations reported their East Central Indiana area operations were comparable to or better than the other regions in terms of profitability and production.



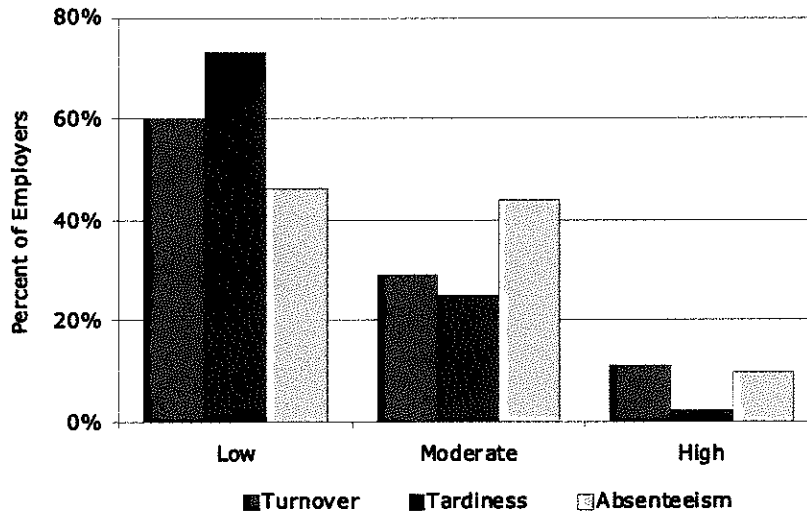
Based upon the experience of The Pathfinders in evaluating labor forces in numerous locations, a definite correlation between productivity, absenteeism, tardiness, turnover, and substance abuse appears to exist. That correlation goes beyond the fact that an absent worker is obviously unproductive. Rather, those factors are indicative of an employee's attitude toward the job.

The employers surveyed in this study were asked to rate turnover, tardiness and absenteeism among their workers as "Low", "Moderate" or "High". Further, they were surveyed as to their substance abuse testing practices and asked to rate substance abuse among the area workforce.

The charts on the following pages illustrate the percent of employers' ratings for these and other factors, including educational facilities, worker productivity and reliability, teamwork and basic skills.

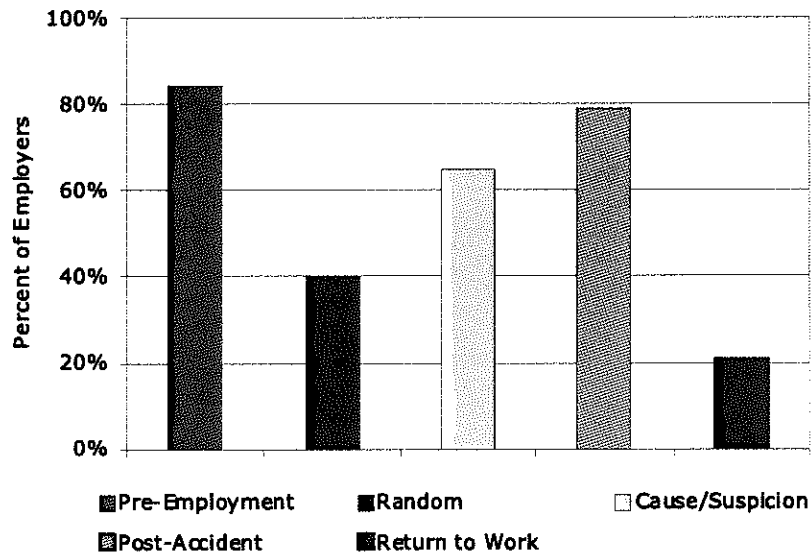
EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE

TURNOVER / TARDINESS / ABSENTEEISM



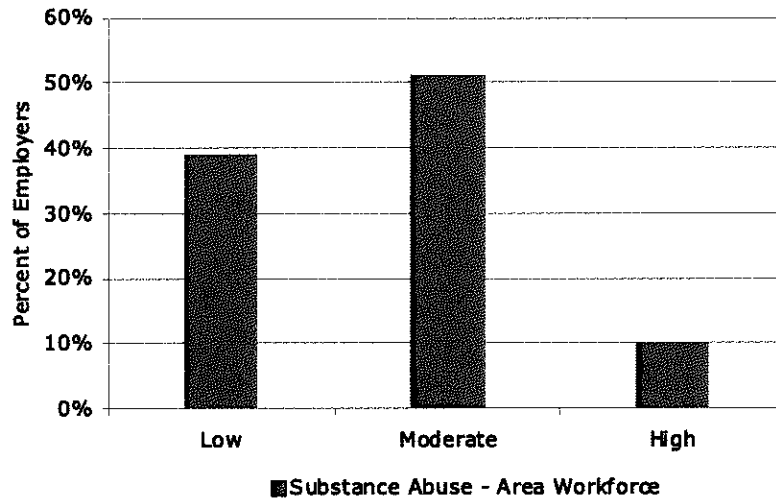
In the East Central Indiana labor shed, 81% of the employers interviewed stated their companies tested for substance abuse, using one or more of the following practices:

SUBSTANCE ABUSE TESTING PRACTICES



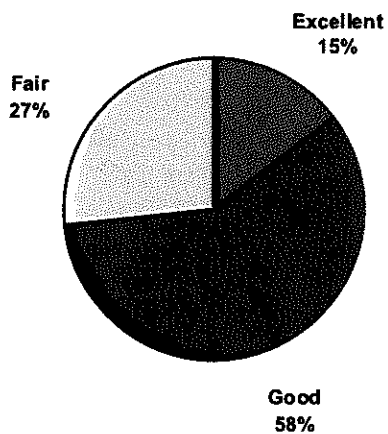
EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE

SUBSTANCE ABUSE RATING – AREA WORKFORCE

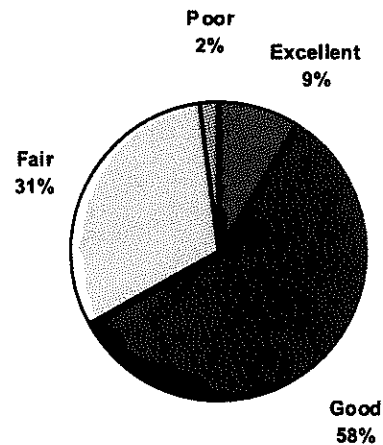


Further, 70% of the employers surveyed completed criminal background checks on potential employees, and 75% checked for valid drivers' licenses.

WORKER PRODUCTIVITY

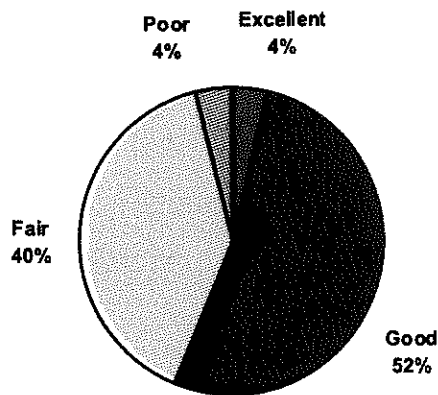


WORKER RELIABILITY

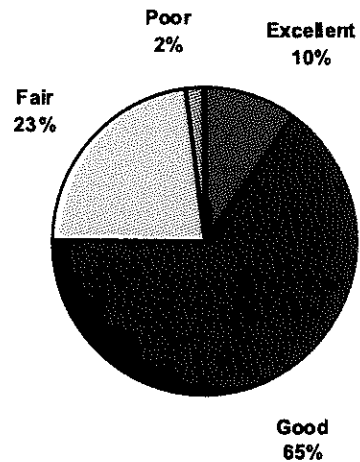


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE

WORKER ATTITUDES

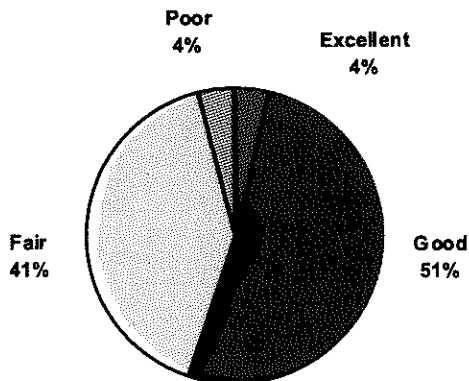


TEAMWORK SKILLS

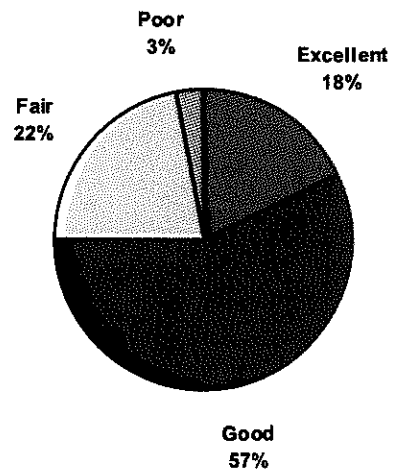


The educational competencies of employees are additional factors used to evaluate an area's labor force. In the East Central Indiana area, 55% of the employers interviewed rated the local public schools as "Excellent" or "Good", and 75% rated the local community colleges and technical schools as "Excellent" or "Good". Ratings for basic skills and other factors are also shown.

LOCAL PUBLIC SCHOOLS

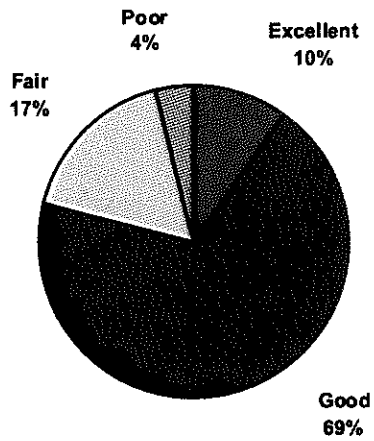


**LOCAL COMMUNITY COLLEGES
AND TECH SCHOOLS**

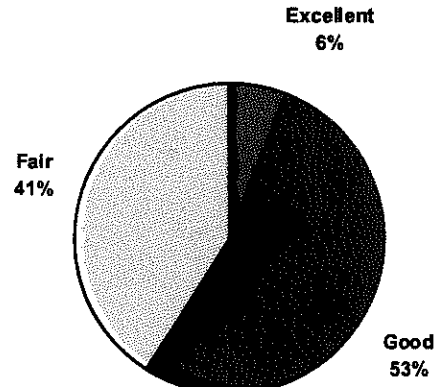


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE

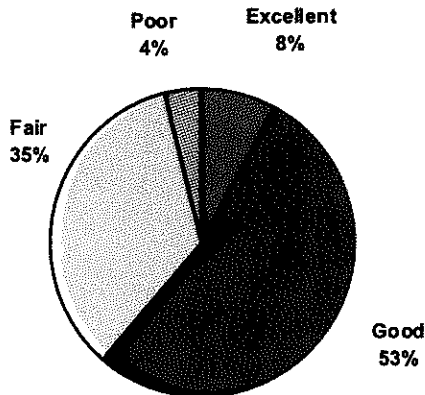
READING SKILLS



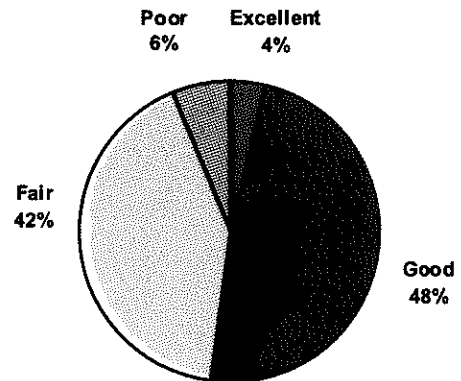
WRITING SKILLS



COMPUTER SKILLS

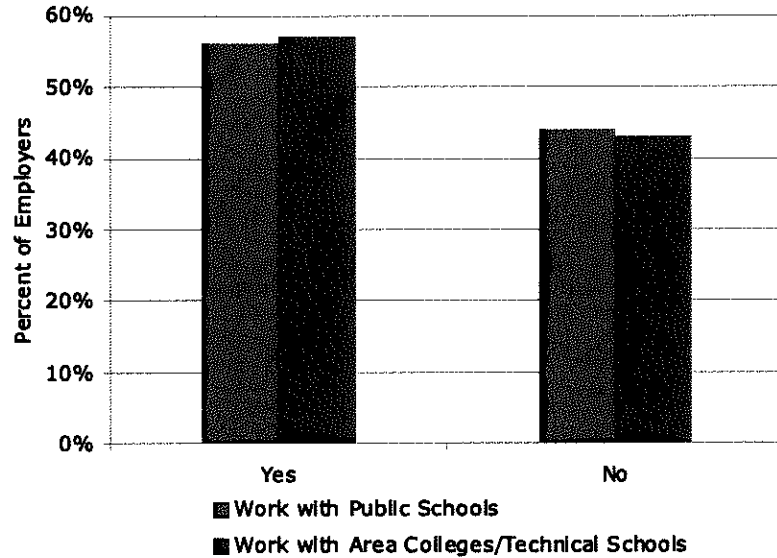


MATH SKILLS

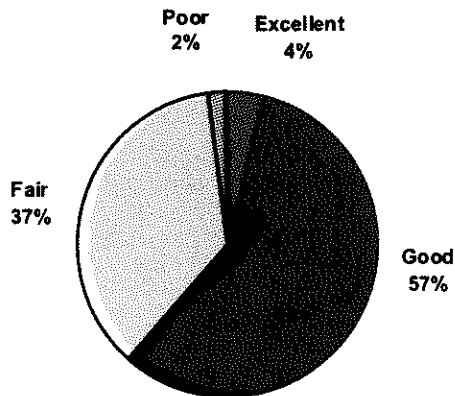


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE

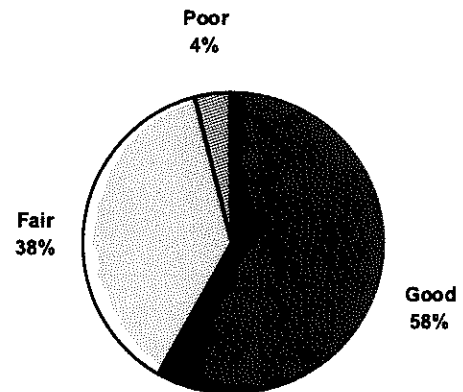
Additionally, many of the employers interviewed stated their companies worked with the area educational institutions in terms of apprenticeships, internships or other training programs.



WORKER ENTRY LEVEL SKILLS

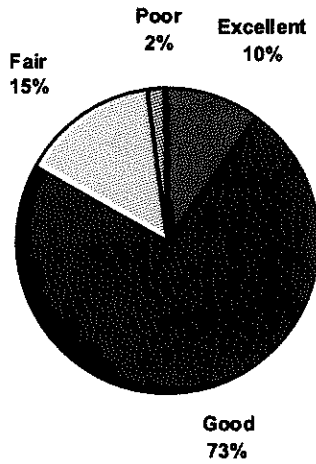


JOB READINESS SKILLS

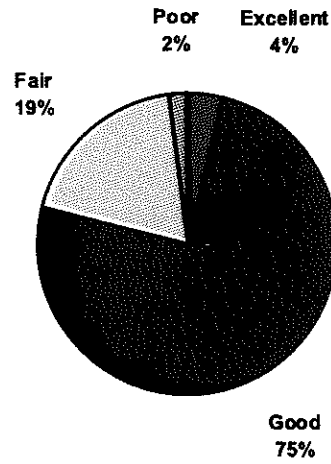


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE

WORKER TRAINABILITY

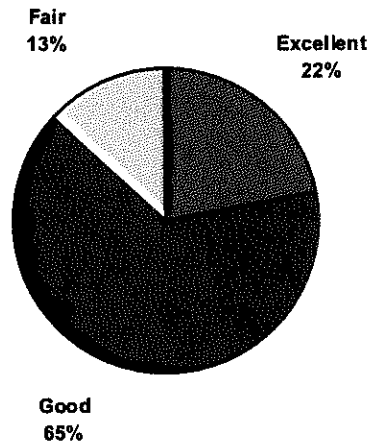


WORKFORCE OVERALL RATING

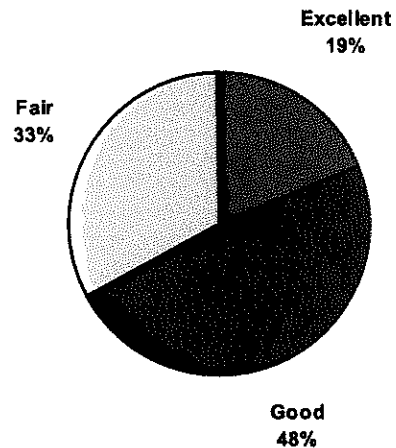


Further, the employers who were interviewed gave the following ratings to the area's business climate in terms of such factors as support and communication and also rated the area's overall quality of life. In addition, the employers offered their opinions on the availability of labor in the area.

AREA BUSINESS CLIMATE

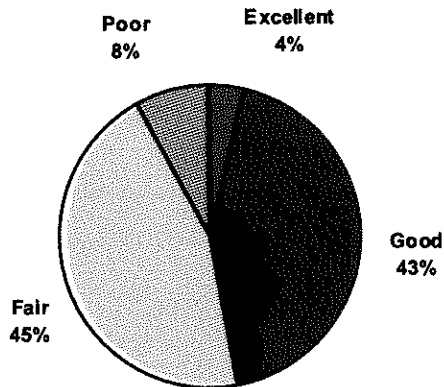


AREA QUALITY OF LIFE

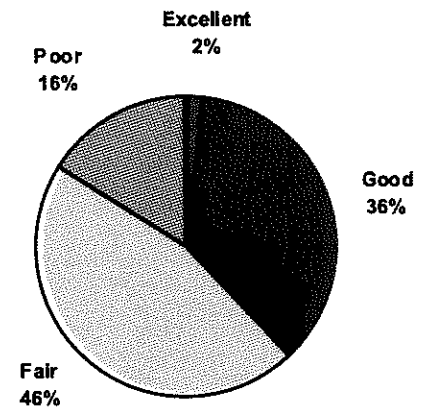


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE

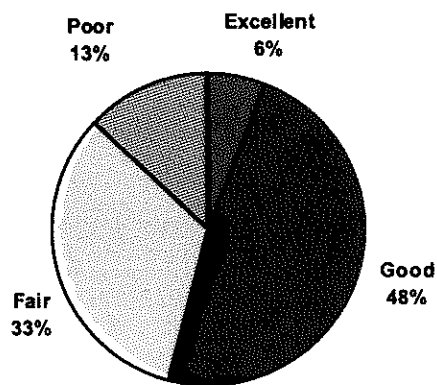
SKILLED WORKERS AVAILABILITY



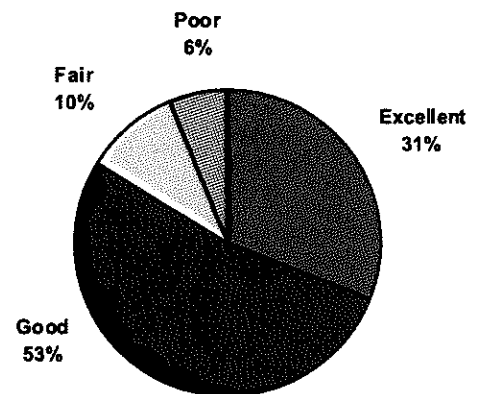
TECHNICAL WORKERS AVAILABILITY

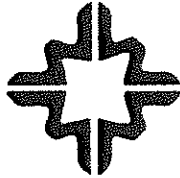


PROFESSIONAL WORKERS AVAILABILITY



UNSKILLED WORKERS AVAILABILITY





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