

**THE
EAST CENTRAL INDIANA
SOUTH REGION
LABOR AVAILABILITY REPORT**

May, 2013

Compiled and Prepared by



THE PATHFINDERS

www.thepathfindersus.com

TABLE OF CONTENTS

I. INTRODUCTION.....1

II. KEY FINDINGS.....2

III. METHODOLOGY.....3

IV. NUMBER OF AVAILABLE WORKERS5

V. ASSESSMENT OF THE UNDEREMPLOYED WORKFORCE.....6

A. Desired Wages.....6

B. Characteristics.....8

C. Experience and Skills.....11

D. Factors Affecting Job Desirability15

E. Training Interests17

VI. NATIONAL COMPARISONS OF THE UNDEREMPLOYED WORKFORCE18

A. Desired Wages18

B. Experience.....19

C. Skills22

VII. ASSESSMENT OF THE UNEMPLOYED WORKFORCE25

A. Individuals Actively Seeking Work26

B. Individuals Considering Re-Entering Workforce.....30

VIII. EMPLOYERS’ RATINGS OF THE WORKFORCE39



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 South Region 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 South Region. 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 South 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 South Region, referred to in this report as the “labor shed”, has a household population of approximately 142,600; a civilian labor force of approximately 63,100; and a pool of approximately 6,600 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 5,100 underemployed workers.**
- **The median current pay rate of the underemployed workers in the labor shed is \$14.20 per hour, and their median desired pay rate is \$15.96 per hour.**
- **Survey results indicate that the underemployed workers in the labor shed have high levels of experience and skills in manufacturing and distribution.**
- **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 22 miles.**
- **The median desired pay rate of the unemployed workers who are actively seeking work is \$12.98 per hour.**
- **Approximately 1,500 unemployed individuals in the labor shed who are not actively seeking work would consider re-entering the workforce.**
- **In total, the East Central Indiana South Region has approximately 13,200 available workers for new or expanding businesses.**



METHODOLOGY

The first step in assessing the workforce of the East Central Indiana South Region 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 South Region 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 Fayette, Randolph, Rush, Union and Wayne Counties in Indiana.

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

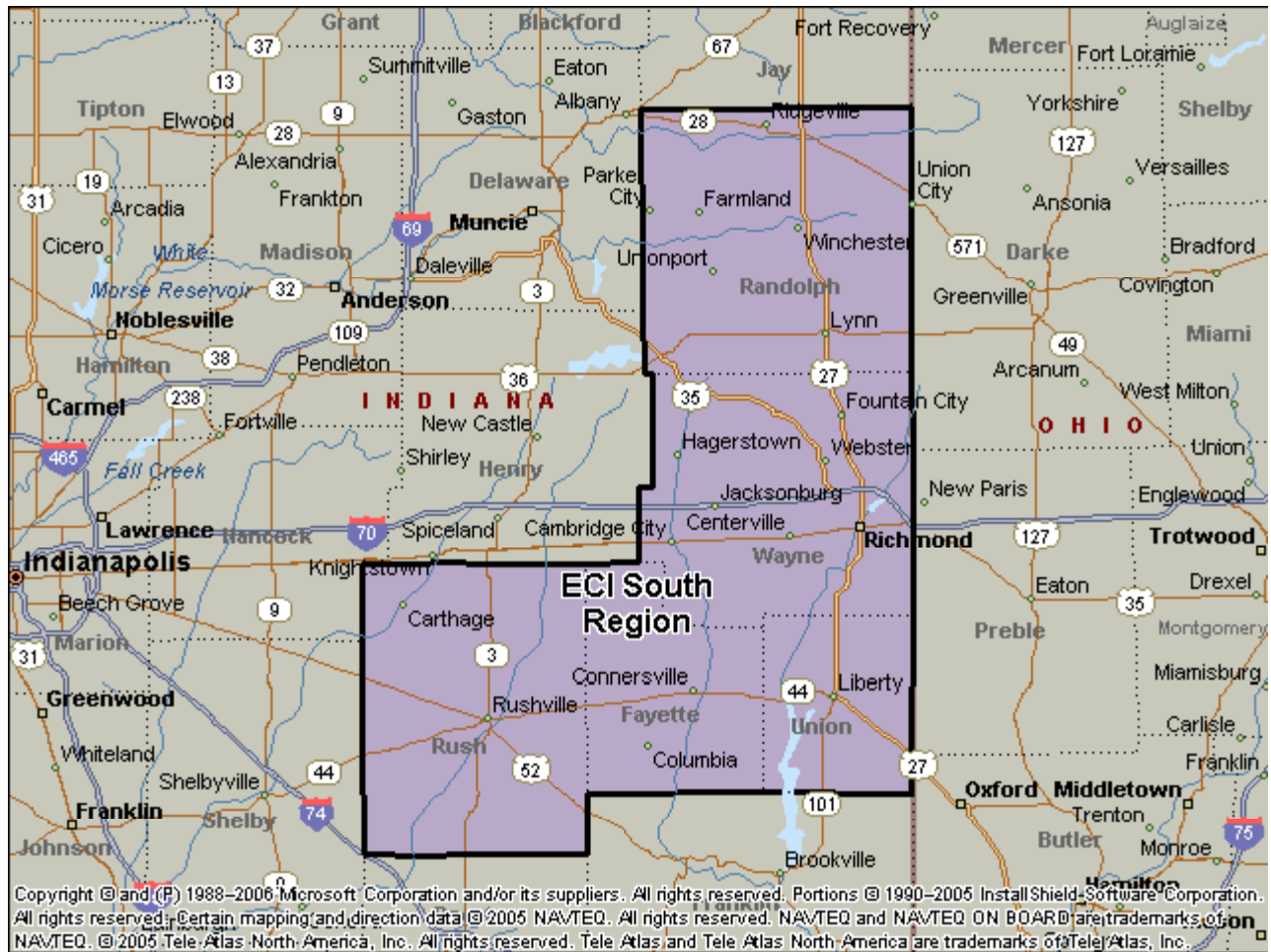
Selected online resources were used in this project. Additionally, The Pathfinders conducted interviews with individuals throughout the East Central Indiana South Region. Those individuals were proportionally stratified across age, household income, and zip codes. The purpose of these surveys was to 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 SOUTH REGION LABOR SHED



NUMBER OF AVAILABLE WORKERS

The East Central Indiana South Region Labor Shed

The East Central Indiana South Region labor shed has a household population of approximately 142,600. The civilian labor force numbers approximately 63,100, and the labor shed contains approximately 6,600 unemployed people who are actively seeking work.

The results of this assessment determined that approximately 5,100 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. Another 1,500 individuals would consider re-entering the workforce. Together with the unemployed, actively seeking work individuals, the East Central Indiana South Region has approximately 13,200 available workers for new or existing employers.

TOTAL AVAILABLE WORKERS

Number of underemployed workers	5,100
Number of unemployed, actively seeking work individuals	6,600
Number of unemployed individuals who are considering re-entering the workforce	1,500
Total Number of Workers Available for Employers*	13,200

* 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 South Region Labor Shed

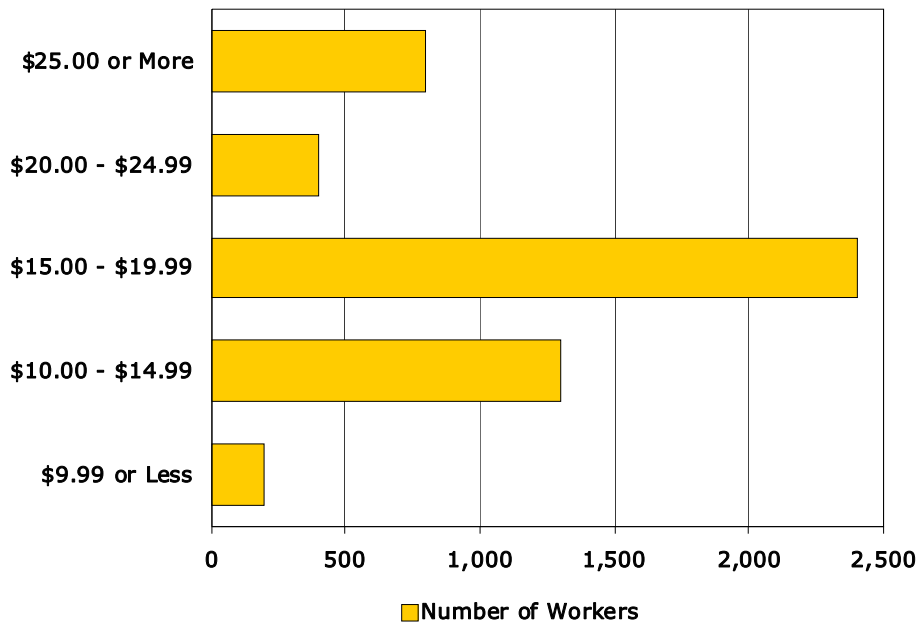
The 5,100 underemployed workers identified in this report might also be termed “upgraders”. They desire to move into an upgraded job and appear to possess the skills, education, and experience to enable them to do so. The following charts represent the desired pay rates of the underemployed individuals 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)

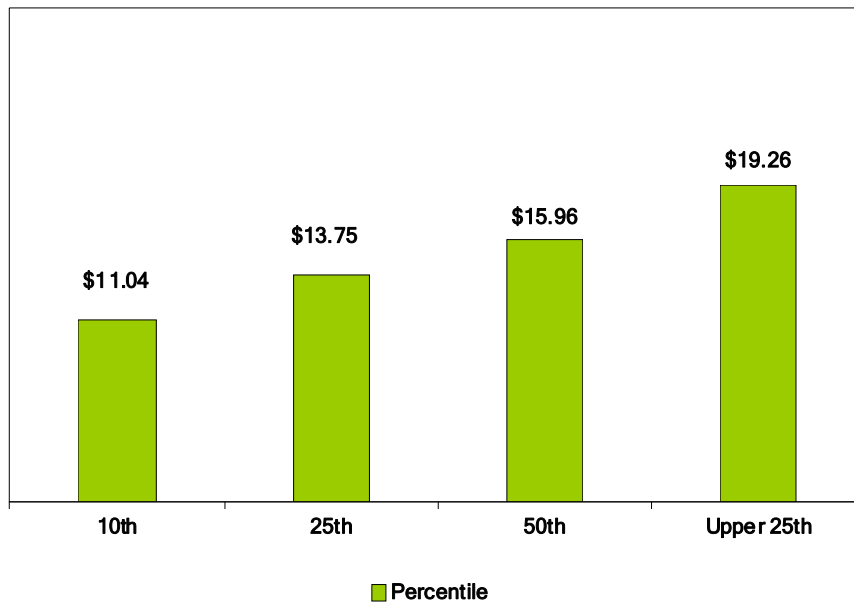
Desired Pay Rate	Number Available
\$9.99 or Less	200
\$10.00 - \$11.99	600
\$12.00 - \$13.99	500
\$14.00 - \$15.99	1,300
\$16.00 - \$17.99	700
\$18.00 - \$19.99	600
\$20.00 - \$21.99	200
\$22.00 - \$23.99	200
\$24.00 - \$25.99	200
\$26 or More	600



DESIRED WAGE RATES PER HOUR BY RANGE
5,100 Underemployed Workers



DESIRED WAGE RATES PER HOUR BY PERCENTILE
5,100 Underemployed Workers



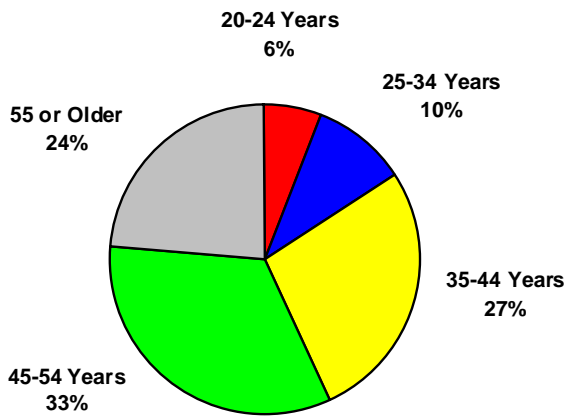
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

The East Central Indiana South Region Labor Shed

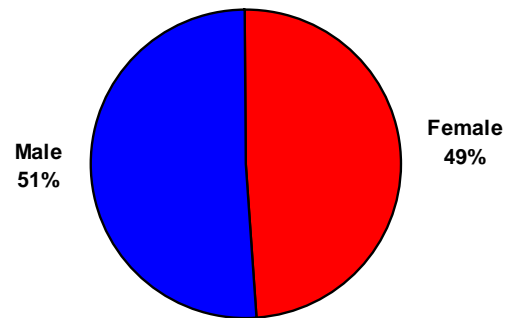
5,100 Underemployed Workers

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.**

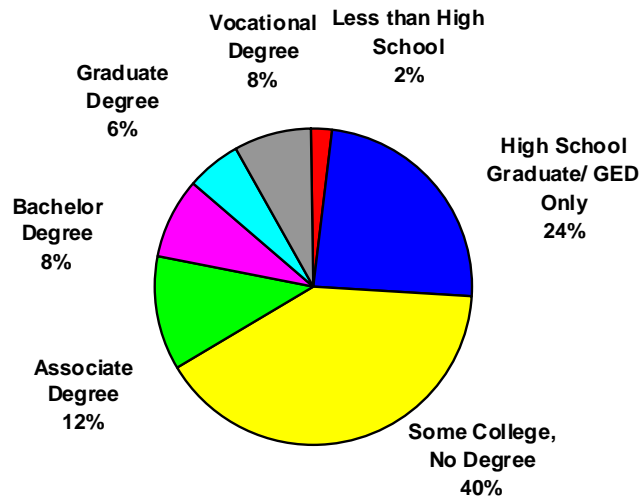
AGE - Average 45 Years



GENDER



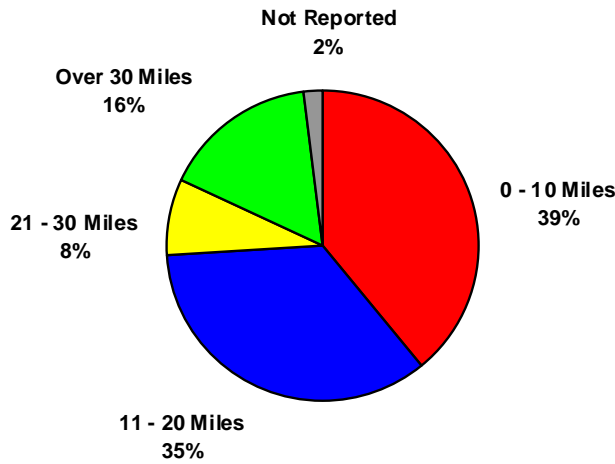
EDUCATION



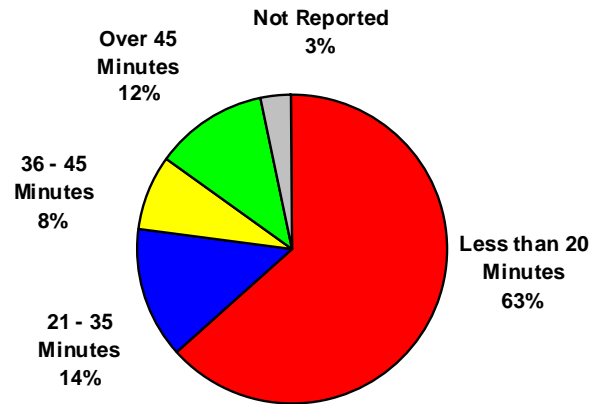
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

5,100 Underemployed Workers

CURRENT COMMUTE DISTANCE

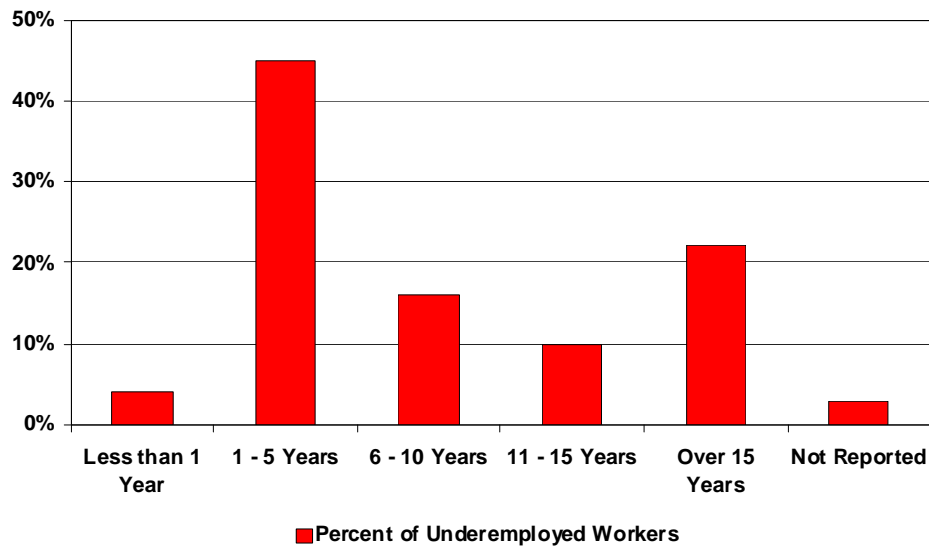


CURRENT COMMUTE TIME



The average commute time of the underemployed workers in the labor shed is 27 minutes, and the average current commute distance is 22 miles.

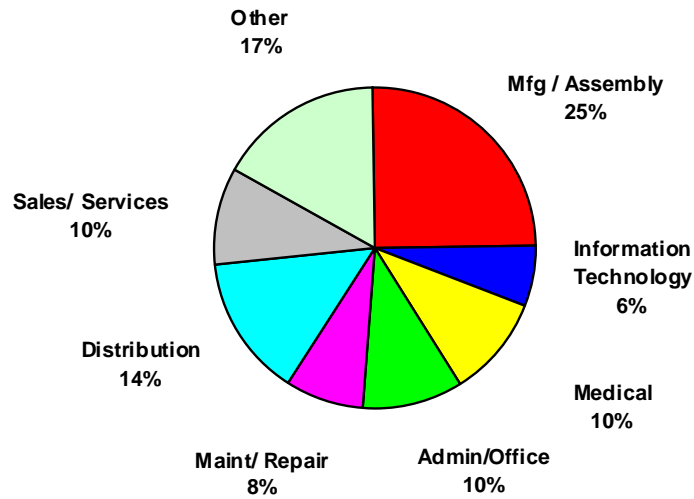
LENGTH OF TIME IN CURRENT JOB



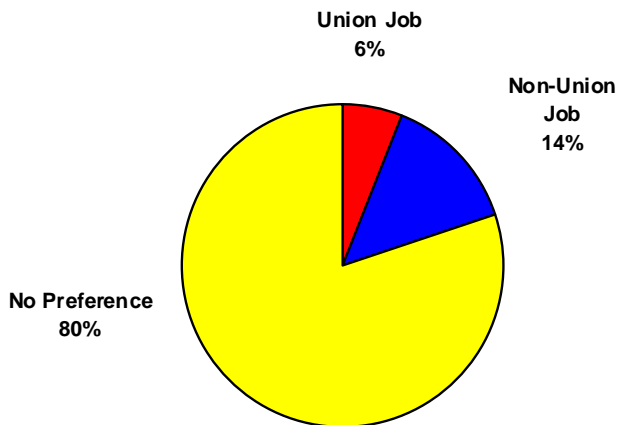
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

5,100 Underemployed Workers

CURRENT AREA OF EMPLOYMENT

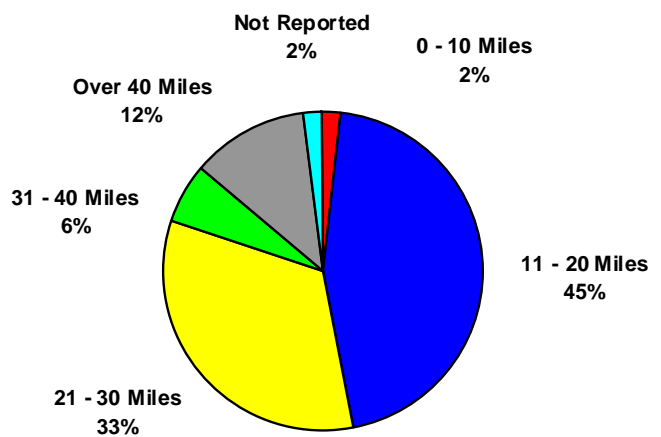


UNION PREFERENCE



MILES WILLING TO COMMUTE

Average 29 Miles



EXPERIENCE AND SKILLS – UNDEREMPLOYED WORKERS

5,100 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 chart reports the approximate number of underemployed workers experienced in each category. The chart also gives the percentage of the total number of underemployed experienced in each category and the average number of years of experience in each category. Further, an accompanying chart illustrates the percentage of the total underemployed workers in the labor shed who are experienced in each category and the percent of those who use each category of experience in their current jobs.

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, the percent of the total underemployed, and the percent of underemployed workers who use each skills category 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%.



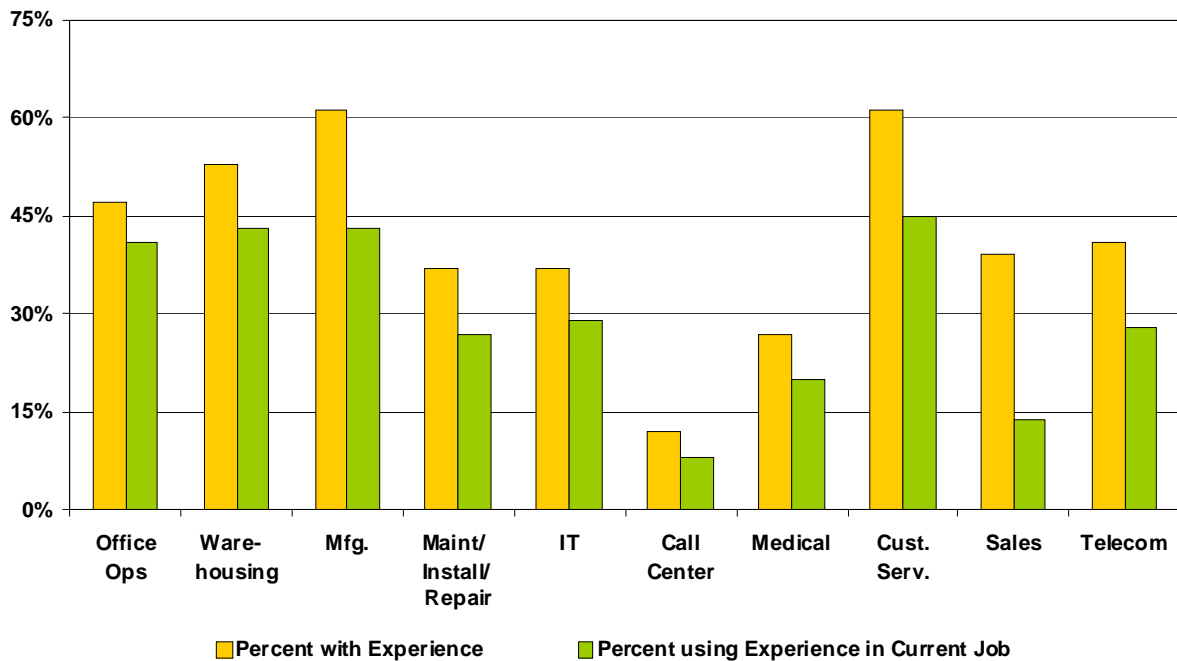
EXPERIENCE OF UNDEREMPLOYED WORKERS

5,100 Underemployed Workers

Experience Category	Number of Workers*	Percentage of Total	Average Years of Experience
Manufacturing/Assembly/Fabrication	3,100	61%	10
Customer Service	3,100	61%	10
Warehouse/Distribution/Transportation	2,700	53%	10
Office Operations	2,400	47%	12
Telecommunications	2,100	41%	9
Sales	2,000	39%	6
Maintenance/Installation/Repair	1,900	37%	11
Information Technology	1,900	37%	10
Medical/Health Sciences	1,400	27%	13
Call Center	600	12%	8

* Rounded

EXPERIENCE USED IN CURRENT JOB



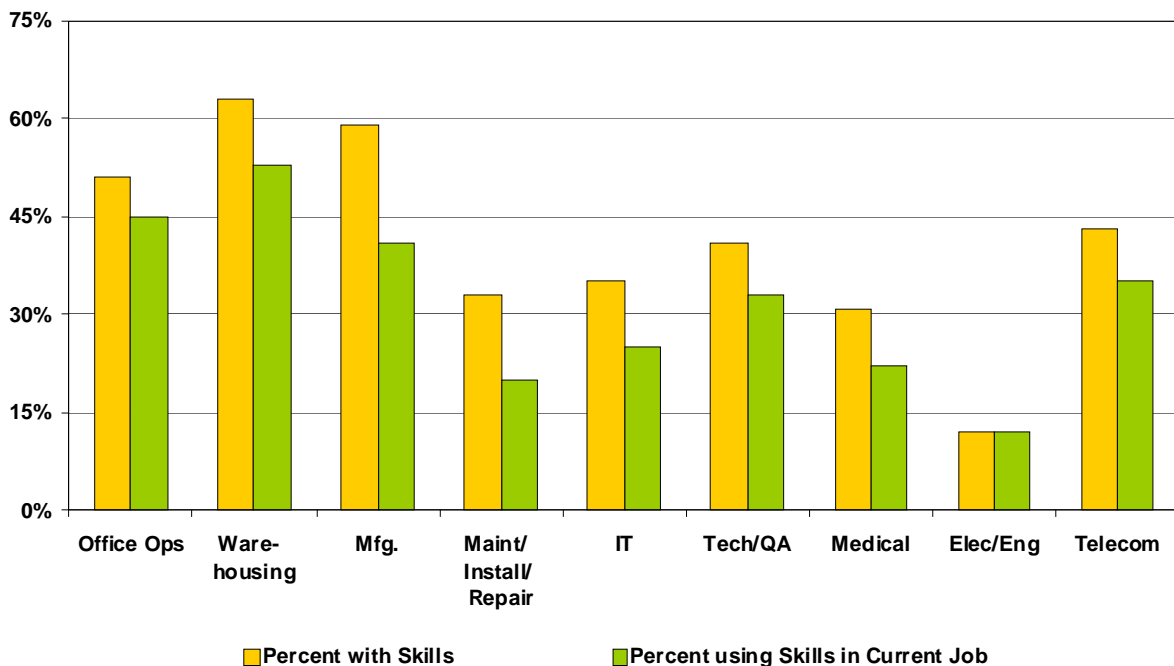
SKILLS OF UNDEREMPLOYED WORKERS

5,100 Underemployed Workers

Skills Category	Number of Workers*	Percentage of Total
Warehouse/Logistics	3,200	63%
Manufacturing/Assembly/Fabrication	3,000	59%
Office Operations	2,600	51%
Telecommunications	2,200	43%
Technician/Quality Assurance	2,100	41%
Information Technology	1,800	35%
Maintenance/Installation/Repair	1,700	33%
Medical/Health Sciences	1,600	31%
Electronics/Engineering	600	12%

* 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 EXPERIENCED

Experience Category	Percentage of Respondents
Manufacturing/Assembly/Fabrication	20%
Office Operations	19%
Warehouse/Distribution/Transportation	18%
Customer Service	15%
Maintenance/Installation/Repair	12%
Medical/Health Sciences	8%
Information Technology	6%
Telecommunications	2%

CATEGORY OF MOST SKILLED

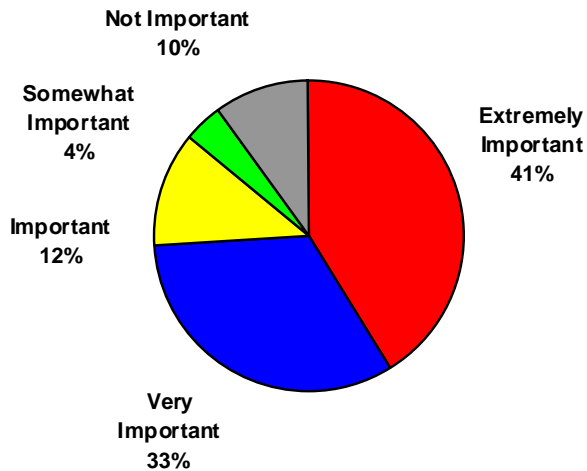
Skills Category	Percentage of Respondents
Office Operations	21%
Warehouse/Logistics	19%
Manufacturing/Assembly/Fabrication	18%
Medical/Health Sciences	10%
Maintenance/Installation/Repair	8%
Information Technology	8%
Telecommunications	8%
Electronics/Engineering	4%
Technician/Quality Assurance	4%



FACTORS AFFECTING JOB DESIRABILITY 5,100 Underemployed Workers

In an effort to identify those factors most important to the East Central Indiana South Region’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”.

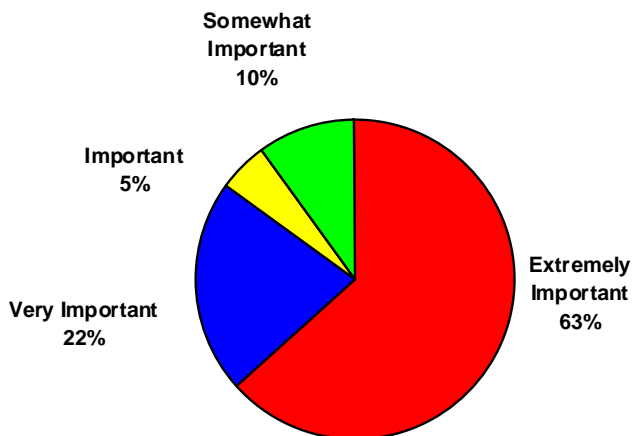
SALARY



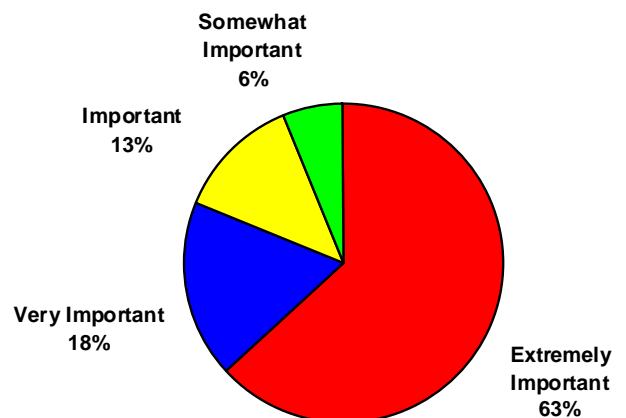
LOCATION



INSURANCE BENEFITS



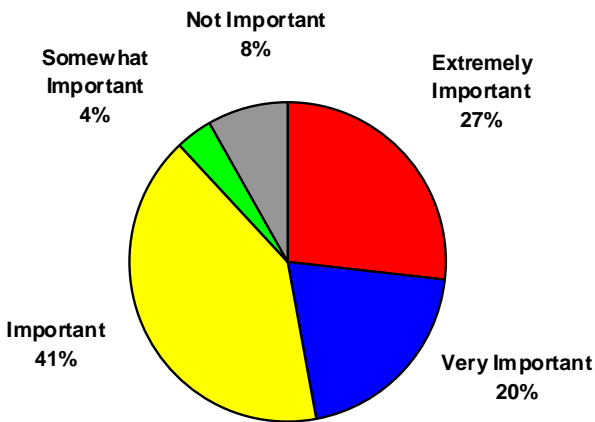
RETIREMENT BENEFITS



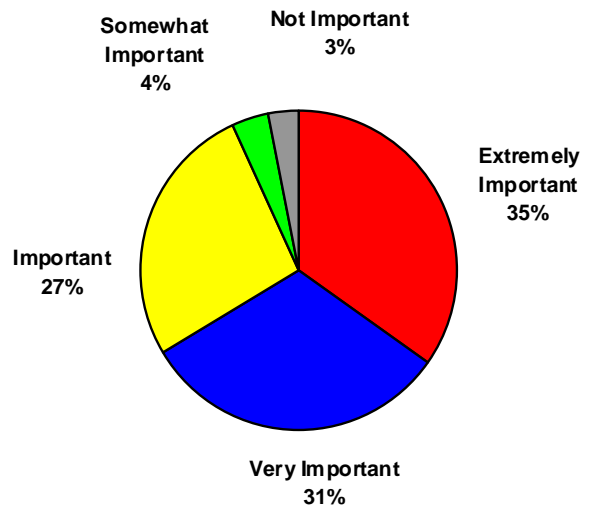
FACTORS AFFECTING JOB DESIRABILITY

5,100 Underemployed Workers

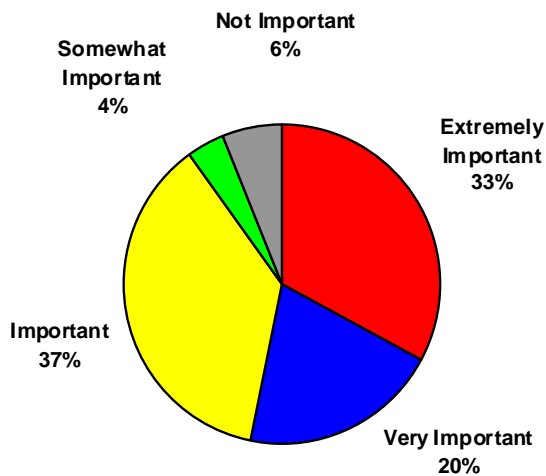
PHYSICAL WORKING ENVIRONMENT



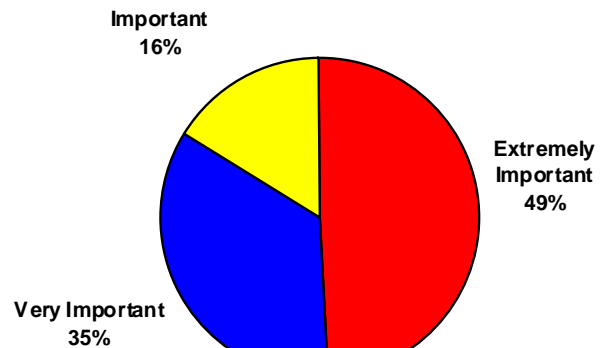
PAID TRAINING PROGRAMS



FLEXIBLE WORK SCHEDULE



OPPORTUNITY FOR ADVANCEMENT



INTEREST IN TRAINING COURSES

5,100 Underemployed Workers

A component was added to this survey which was designed to determine possible interest in training courses on the part of the underemployed workers in the East Central Indiana South Region workforce. In the table that follows, it should be noted that many of the respondents indicated interest in more than one program; therefore, the percent total will not equal 100.

Type of Training Course	Number of Workers (Rounded)	Percentage of Total
Human Resources	2,100	41%
Industrial Machine Operations	2,100	41%
Health Care	1,900	37%
Computer Software Applications	1,800	35%
Computer Maintenance or Repair	1,600	31%
Computer Programming	1,500	29%
Construction Trades	1,500	29%
Technical Trades	1,400	28%
Food Service or Hospitality	1,100	22%
Real Estate or Insurance	1,000	20%
Commercial Vehicle Operations	900	18%
Restaurant or Retail Management	800	16%
Auto or Maintenance Mechanics	600	12%
GED or Basic Reading, Writing, Arithmetic	400	8%
ESL (English as a Second Language)	200	4%

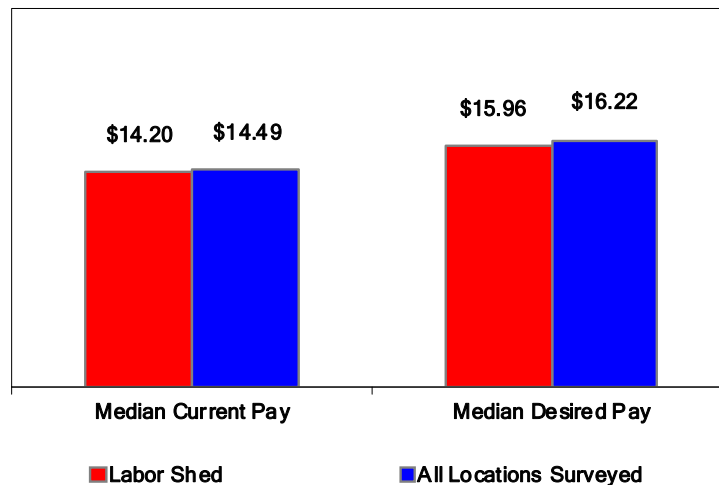


NATIONAL COMPARISONS OF UNDEREMPLOYED WORKFORCE

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 South 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 South Region is referred to as “labor shed”.

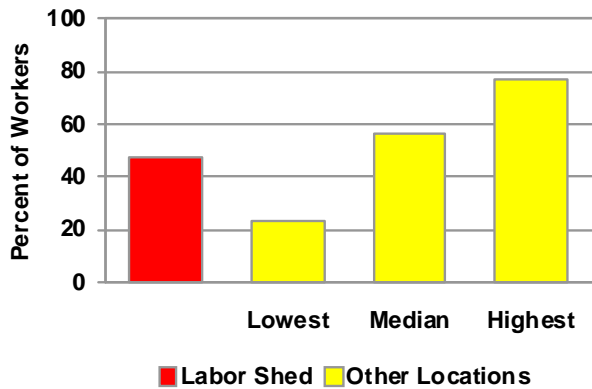
The chart below illustrates the median current and desired wages of the underemployed workers in the East Central Indiana South Region labor shed as compared to those underemployed workers in all locations surveyed by The Pathfinders over the past eighteen months. As indicated, the median current pay of all surveyed, underemployed workers over the past eighteen months is \$14.49 per hour, and the median desired pay of these workers is \$16.22 per hour. As shown, survey results indicate that the East Central Indiana South Region region’s underemployed workers have comparable pay rates in both median current pay and desired pay than other locations surveyed.

COMPARISON OF MEDIAN CURRENT / DESIRED WAGES (per hour)

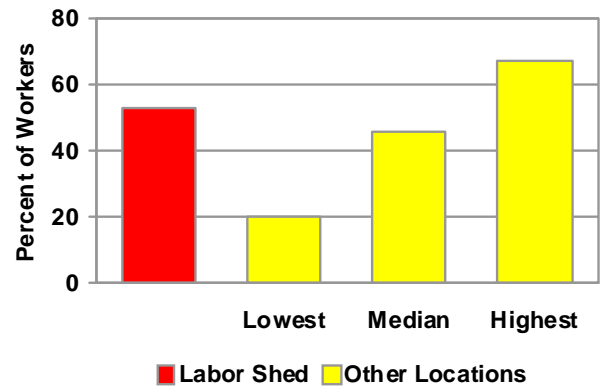


**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The East Central Indiana South Region /
Locations Surveyed Over the Past 18 Months**

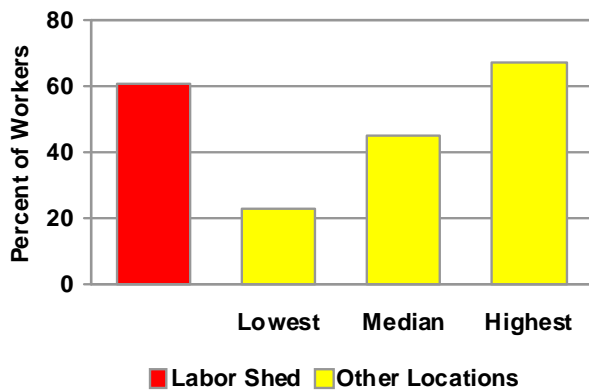
OFFICE



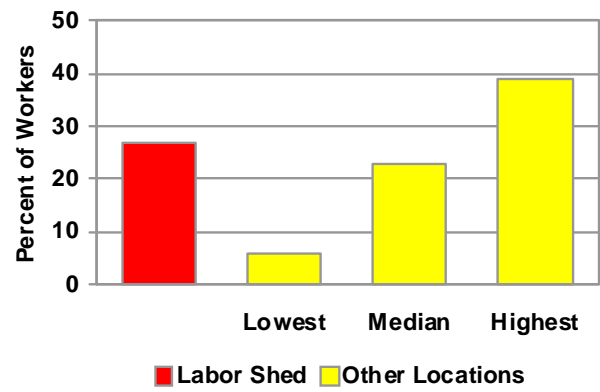
**WAREHOUSE / DISTRIBUTION /
TRANSPORTATION**



**MANUFACTURING / ASSEMBLY /
FABRICATION**

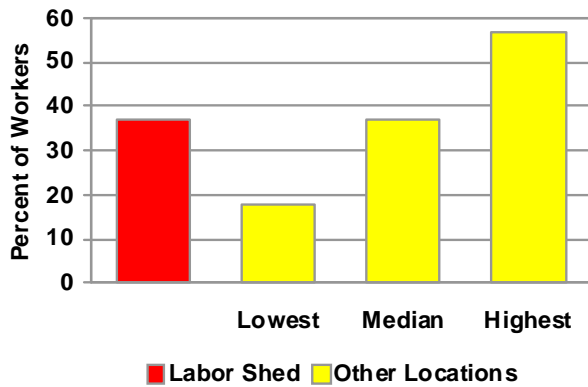


**MEDICAL /
HEALTH SCIENCES**

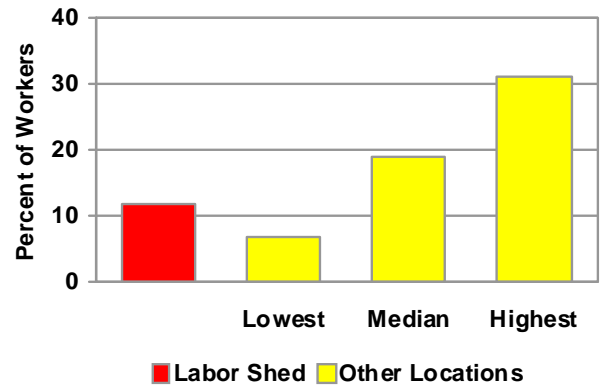


**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The East Central Indiana South Region /
Locations Surveyed Over the Past 18 Months**

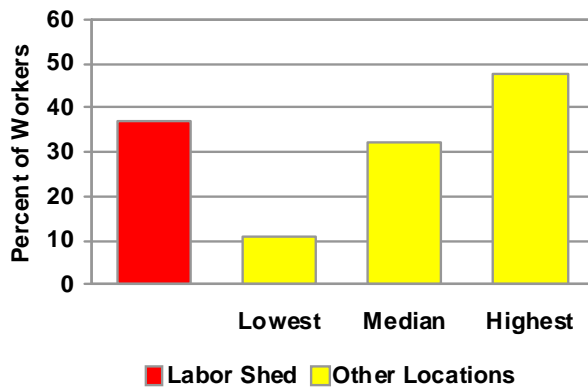
**MAINTENANCE /
INSTALLATION / REPAIR**



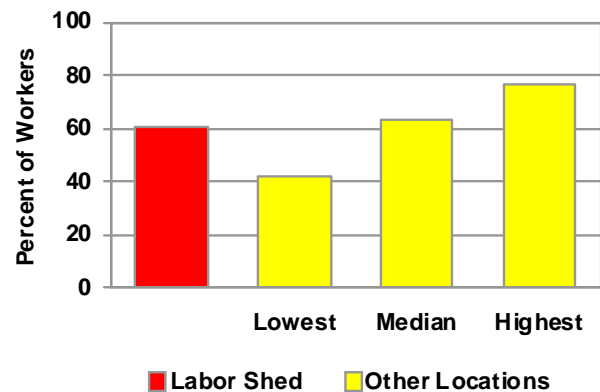
CALL CENTER



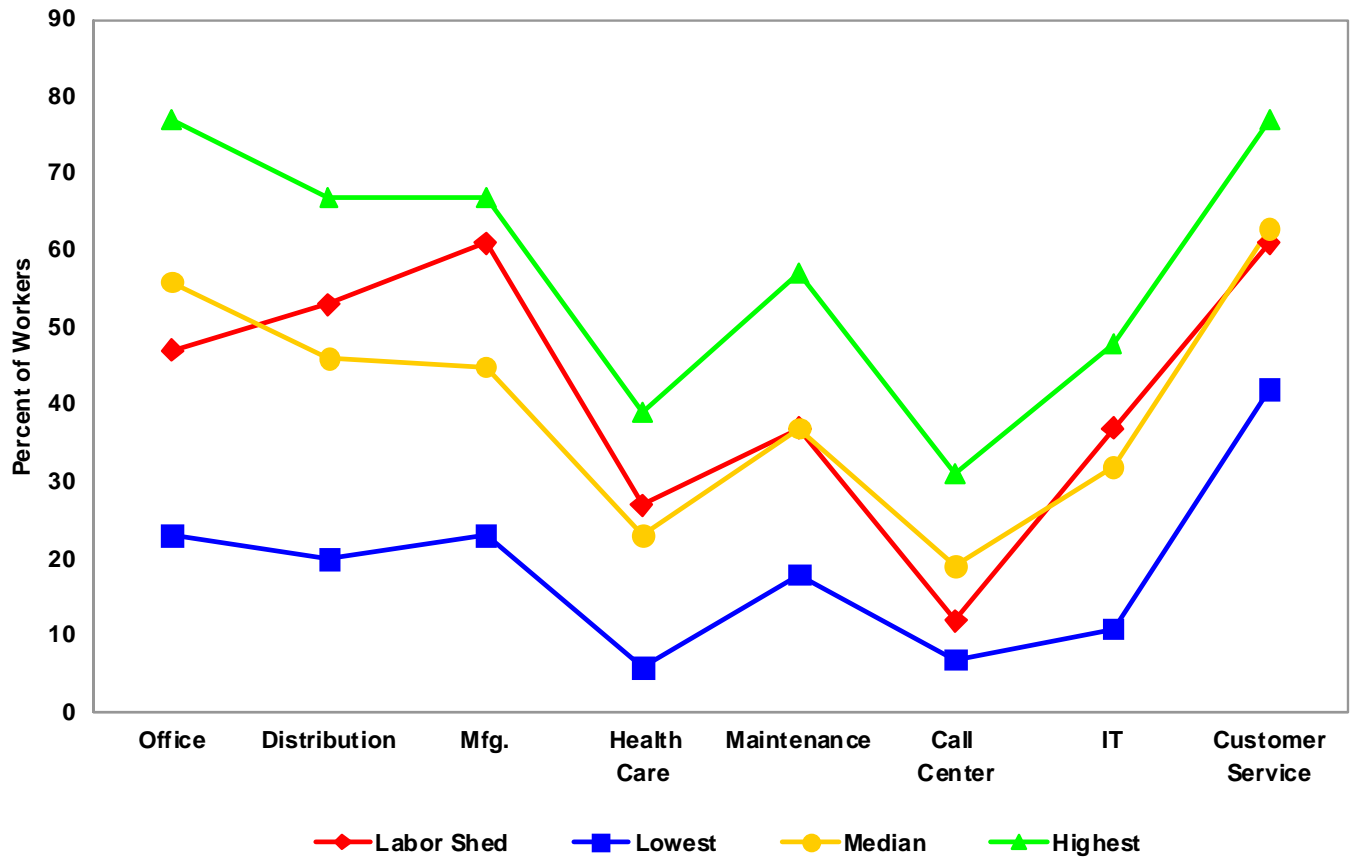
INFORMATION TECHNOLOGY



CUSTOMER SERVICE

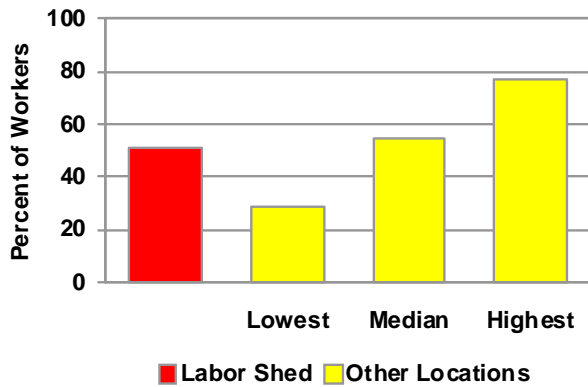


**SUMMARY COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The East Central Indiana South Region /
Locations Surveyed Over the Past 18 Months**

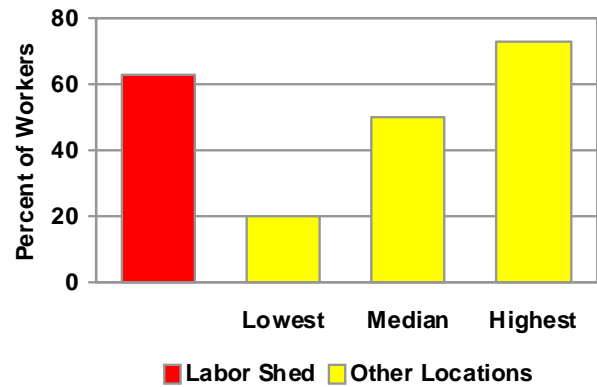


**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The East Central Indiana South Region /
Locations Surveyed Over the Past 18 Months**

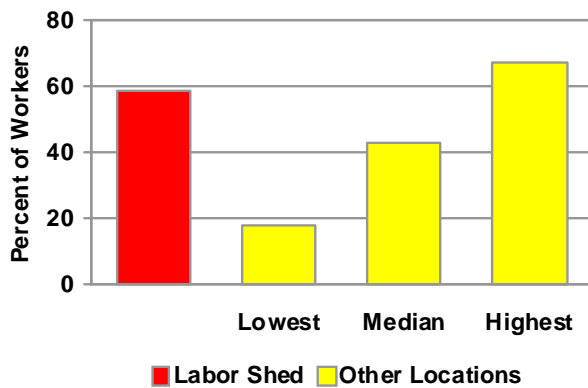
OFFICE



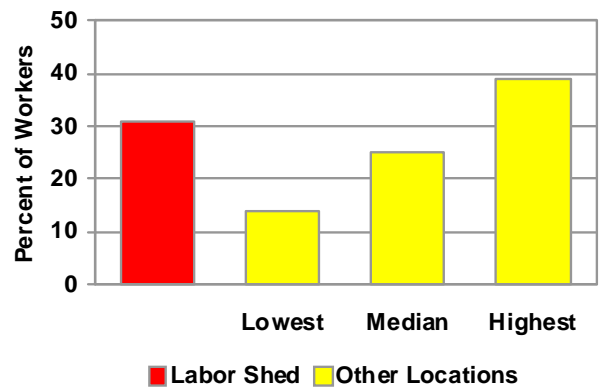
**WAREHOUSE /
LOGISTICS**



**MANUFACTURING / ASSEMBLY /
FABRICATION**

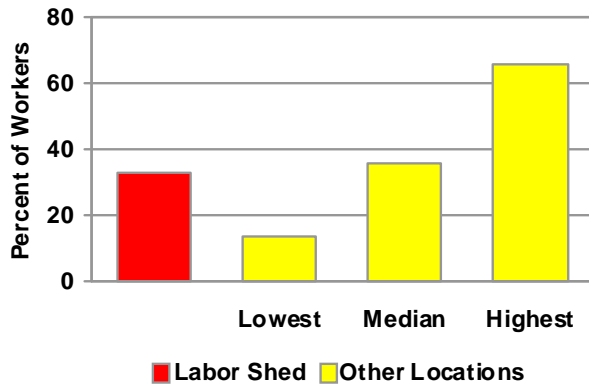


**MEDICAL /
HEALTH SCIENCES**

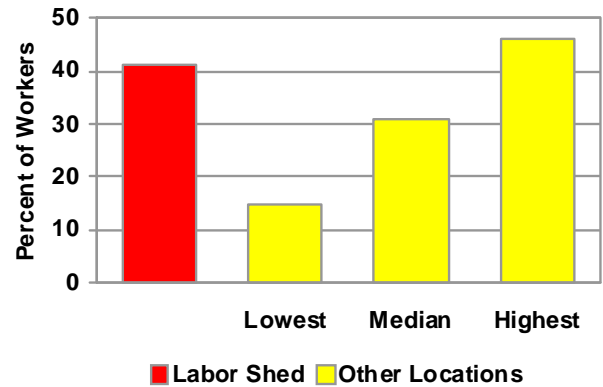


**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The East Central Indiana South Region /
Locations Surveyed Over the Past 18 Months**

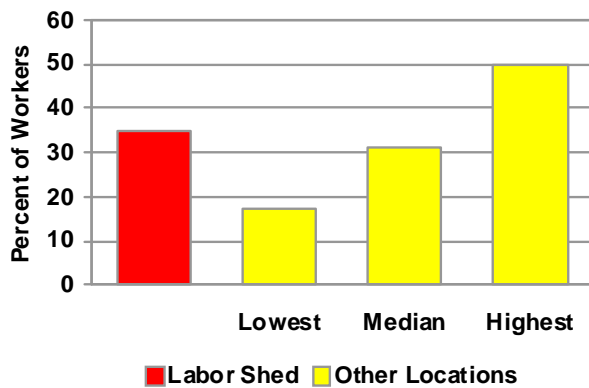
**MAINTENANCE /
INSTALLATION / REPAIR**



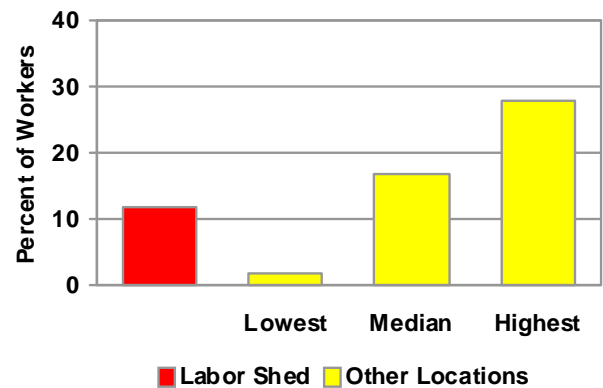
**TECHNICIAN / QUALITY
ASSURANCE**



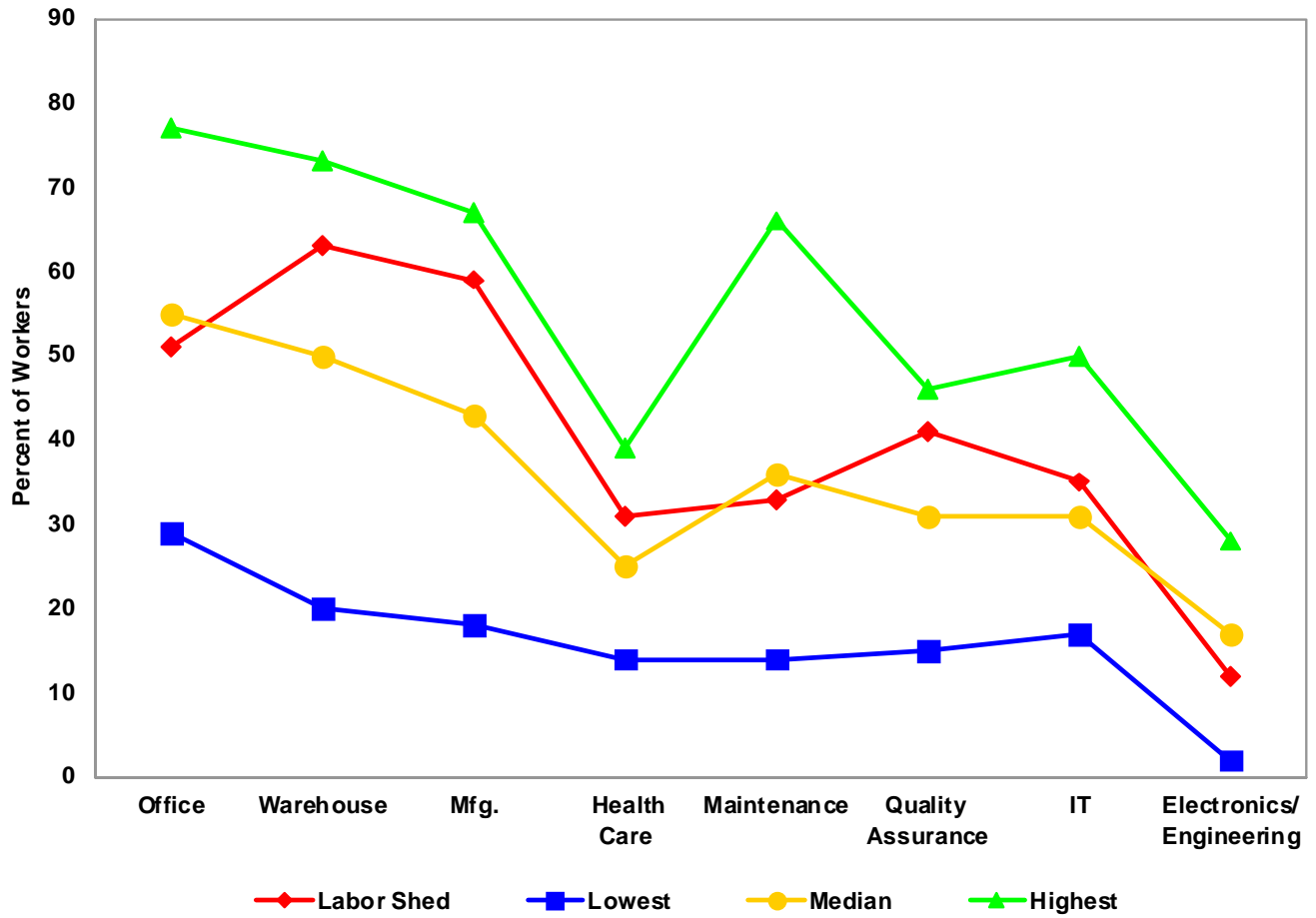
INFORMATION TECHNOLOGY



**ELECTRONICS /
ENGINEERING**



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



ASSESSMENT OF THE UNEMPLOYED WORKFORCE

The East Central Indiana South Region Labor Shed

This report documents two groups of unemployed individuals in the East Central Indiana South Region labor shed who would be available workers for a new or expanding business. The groups are classified as:

- Individuals who are actively seeking work
- Individuals who are considering re-entering the workforce

Published statistics document 6,600 unemployed workers in the labor shed who are actively seeking work. This number could possibly be higher due to individuals looking for work who are not on the roles of the state unemployment agencies. Survey results suggest that an additional 1,500 people, who are not currently employed or actively seeking work, would consider re-entering the workforce.

In total, the labor shed has approximately 8,100 unemployed individuals who would be considered potential workers for a new or expanding operation.

UNEMPLOYED INDIVIDUALS

Number of unemployed, actively seeking work individuals	6,600
Number of unemployed individuals who would considering re-entering the workforce	1,500
Total Number of Unemployed Individuals Available for Employers	8,100

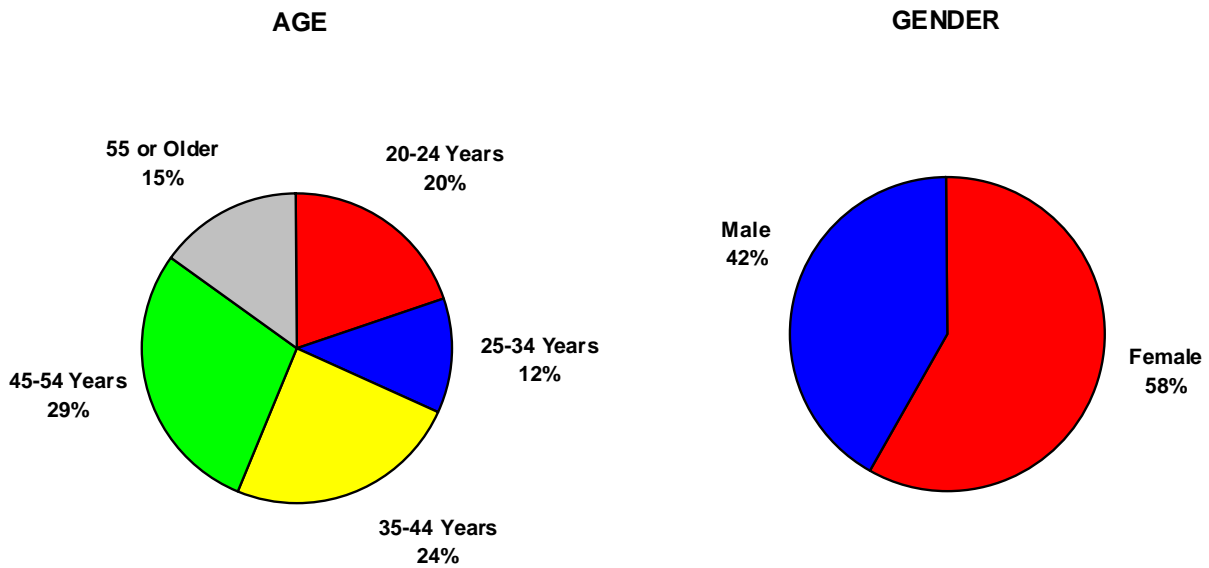
The determinations for these two segments of the workforce have a larger statistical variance than that for the underemployed.



**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK
 6,600 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 South Region labor shed, according to published sources, there are approximately 6,600 individuals who are actively seeking work. Survey results indicate the average age of these individuals is 41 years.



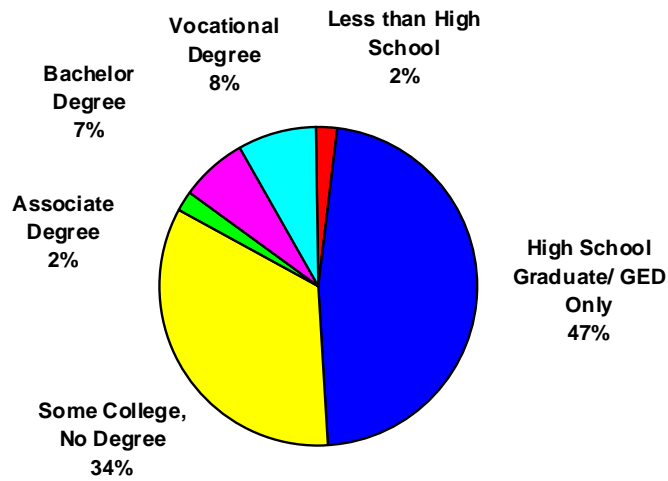
The median desired pay rate of the individuals who are unemployed, actively seeking work is \$12.98 per hour. These available workers have been out of the workforce for an average of 14 weeks and are willing to commute an average of 25 miles for a job.



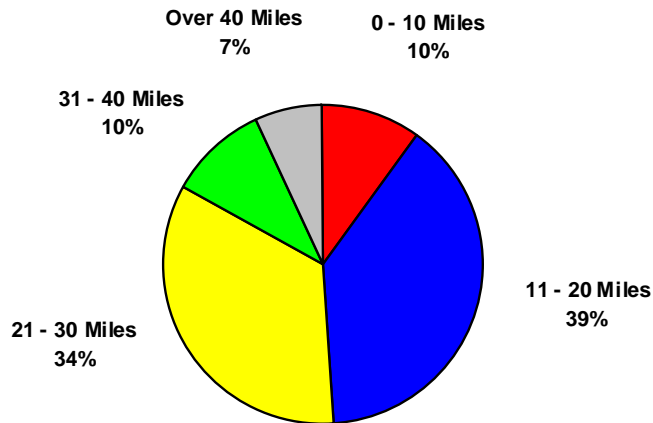
CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE ACTIVELY SEEKING WORK

6,600 Workers

EDUCATION



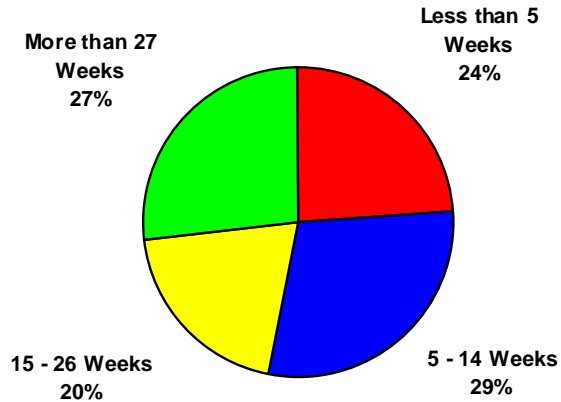
MILES WILLING TO COMMUTE – Average 25 Miles



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

6,600 Workers

**WEEKS OUT OF WORKFORCE
Median 14 Weeks**



REASON FOR BEING OUT OF WORKFORCE

REASON	Percentage of Respondents
Laid Off / Job Eliminated	42%
No Jobs / Discouraged	20%
Company Closed / Relocated	12%
Personal Choice / Stay-At-Home	9%
Student	7%
Medical/Disability	5%
Retired or Close to Retirement	5%



**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK
6,600 Workers**

Experience Category	Number of Individuals*	Percentage of Total	Average Years of Experience
Customer Service	3,700	56%	7
Warehouse/Distribution/Transportation	2,900	44%	9
Manufacturing/Assembly/Fabrication	2,700	41%	11
Sales	2,400	37%	3
Office Operations	2,200	34%	7
Maintenance/Installation/Repair	1,900	29%	6
Medical/Health Sciences	1,500	22%	6
Call Center	1,300	19%	3
Telecommunications	1,100	17%	4
Information Technology	1,000	15%	4

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	2,900	44%
Manufacturing/Assembly/Fabrication	2,800	42%
Office Operations	2,800	42%
Maintenance/Installation/Repair	1,900	29%
Technician/Quality Assurance	1,900	29%
Telecommunications	1,600	24%
Medical/Health Sciences	1,500	22%
Information Technology	1,000	15%
Electronics/Engineering	800	12%

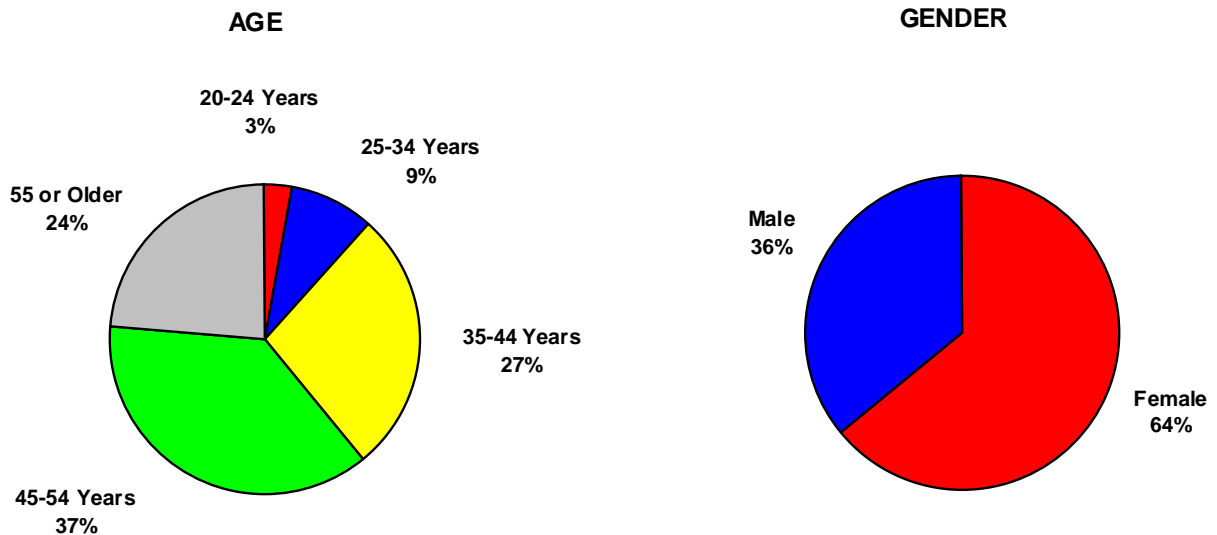
* Rounded



**ASSESSMENT OF INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE
 The East Central Indiana South Region Labor Shed
 1,500 Potential Workers**

The following charts provide information on that segment of unemployed individuals in the labor shed who would consider re-entering the workforce. **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 South Region labor shed, there are approximately 1,500 individuals who are currently unemployed, not actively seeking work, but would consider re-entering the workforce. Survey results indicate the average age of these individuals is 46 years.



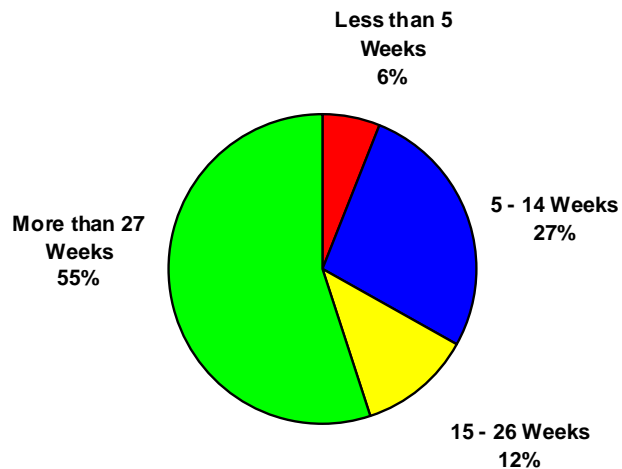
The median desired pay rate of the individuals who would consider re-entering the workforce is \$13.02 per hour. These potential workers have been out of the workforce for an average of 33 weeks and are willing to commute an average of 22 miles for a job.



**CHARACTERISTICS OF INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE**

1,500 Potential Workers

**WEEKS OUT OF WORKFORCE
Median 33 Weeks**



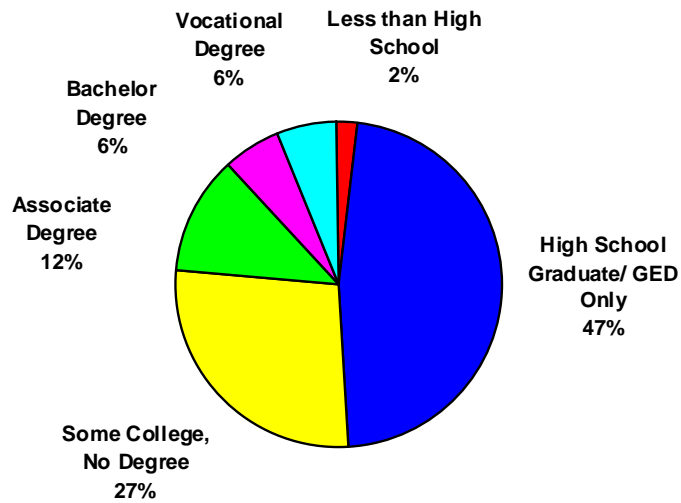
REASON FOR BEING OUT OF WORKFORCE

REASON	Percentage of Respondents
Medical/Disability	30%
Laid Off / Job Eliminated	28%
Personal Choice / Stay-At-Home	21%
Company Closed / Relocated	9%
Retired or Close to Retirement	9%
Student	3%

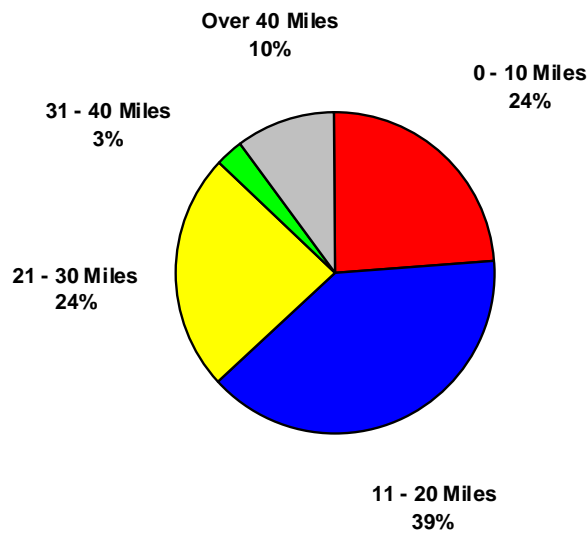


**CHARACTERISTICS OF INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE
1,500 Potential Workers**

EDUCATION



MILES WILLING TO COMMUTE – Average 22 Miles



**CHARACTERISTICS OF INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE
1,500 Potential Workers**

Experience Category	Number of Individuals*	Percentage of Total	Average Years of Experience
Customer Service	1,000	64%	8
Office Operations	600	42%	7
Warehouse/Distribution/Transportation	600	39%	10
Manufacturing/Assembly/Fabrication	600	39%	13
Sales	500	36%	5
Telecommunications	500	33%	5
Medical/Health Sciences	400	27%	9
Maintenance/Installation/Repair	300	21%	10
Call Center	300	21%	9
Information Technology	200	15%	6

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

Skills Category	Number of Individuals*	Percentage of Total
Manufacturing/Assembly/Fabrication	600	39%
Warehouse/Logistics	500	36%
Office Operations	500	36%
Technician/Quality Assurance	500	36%
Telecommunications	400	27%
Medical/Health Sciences	400	27%
Maintenance/Installation/Repair	400	24%
Information Technology	400	24%
Electronics/Engineering	100	9%

* Rounded



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

In developing a profile of existing workers in the East Central Indiana South 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 following tables reflect the methods used to recruit hourly and salaried workers in the East Central Indiana South 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	55%
Newspaper Ads	45%
Referrals	20%
Job Fair	15%
Internet	15%
Walk-Ins	10%
Job Board/Sign	10%
Internal	10%
Recruiters	5%
State Agency	5%
Other	10%

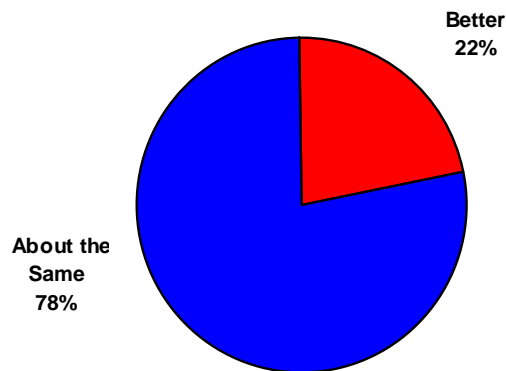


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA SOUTH REGION TOTAL WORKFORCE

Recruiting Methods – Salaried Workers	% of Employers
Newspaper Ads	45%
Word of Mouth	40%
Internet	25%
Referrals	20%
Recruiters	10%
Walk-Ins	10%
Job Board/Sign	10%
Job Fair	10%
Trade Journals	5%
Internal	5%
Other	5%

45% 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 South Region operations were comparable to or better than the other regions in terms of profitability and production.

WORKFORCE COMPARISON WITH OTHER LOCATIONS

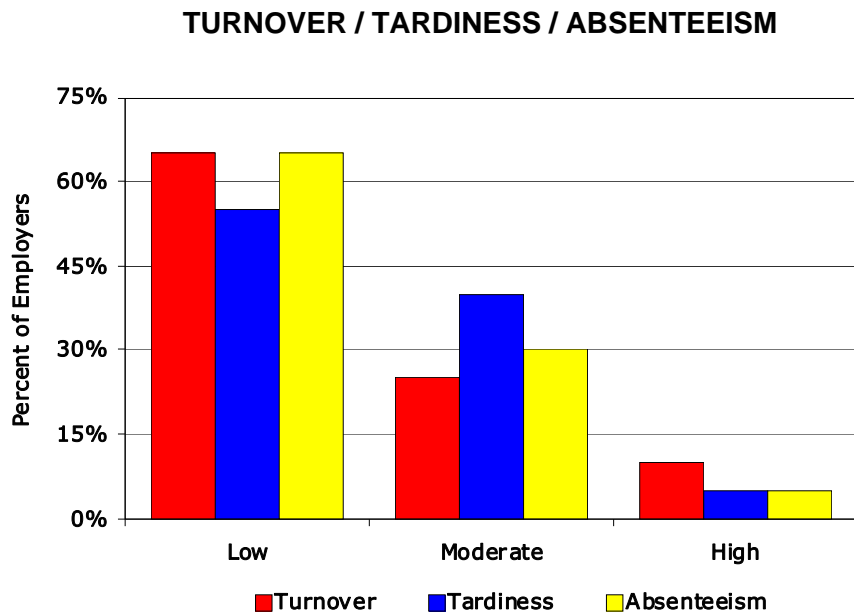


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA SOUTH REGION TOTAL WORKFORCE

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.

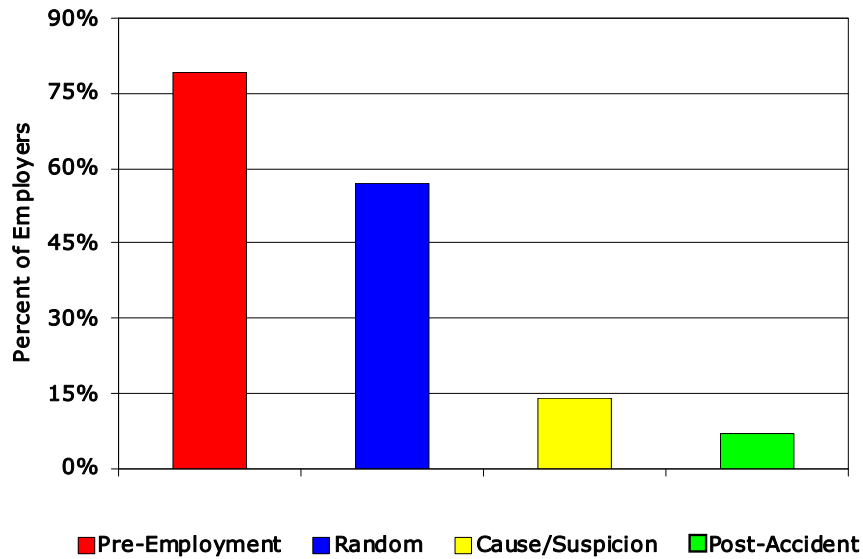
The following charts illustrate the percent of employers' ratings for these and other factors, including educational facilities, worker productivity and reliability, teamwork and basic skills.



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

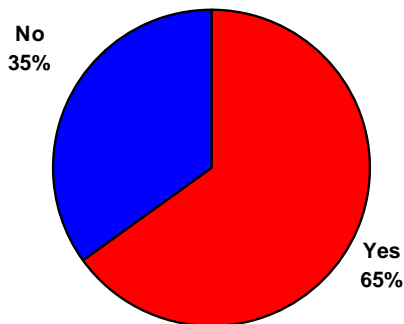
In the East Central Indiana South Region labor shed, 70% of the employers interviewed stated their companies tested for substance abuse, using one or more of the following practices:

SUBSTANCE ABUSE TESTING PRACTICES

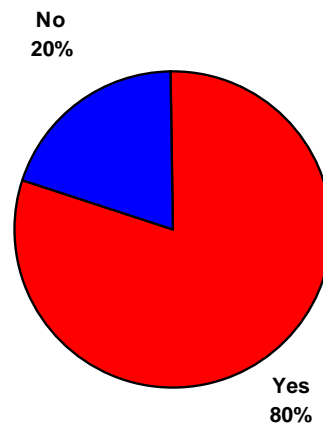


Further, 65% of the employers surveyed completed criminal background checks on potential employees, and 80% checked for valid drivers' licenses.

CRIMINAL BACKGROUND CHECK

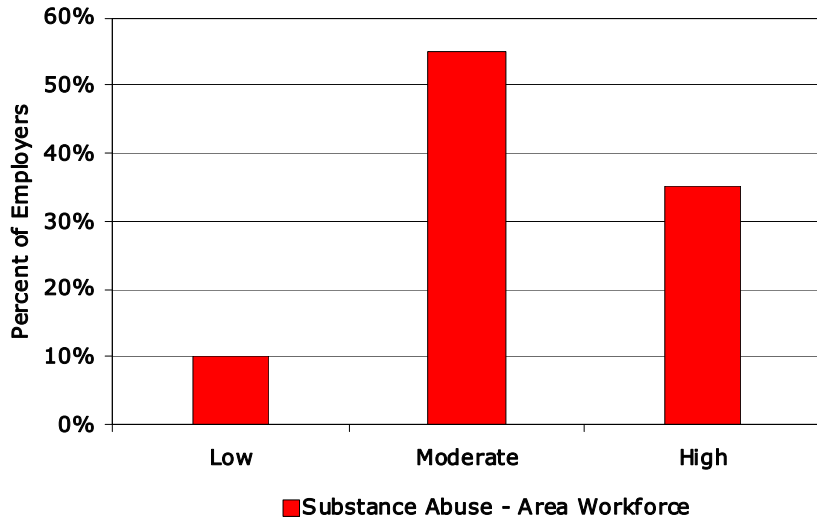


VALID DRIVERS' LICENSES CHECK



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

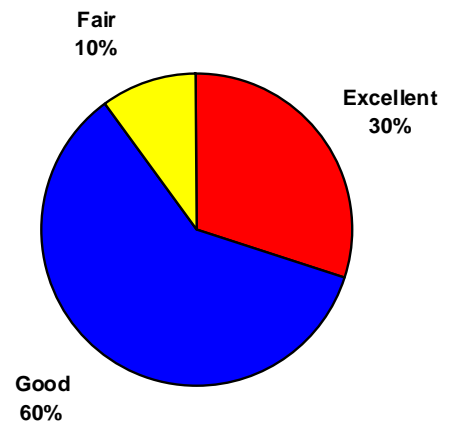
SUBSTANCE ABUSE RATING – AREA WORKFORCE



WORKER PRODUCTIVITY

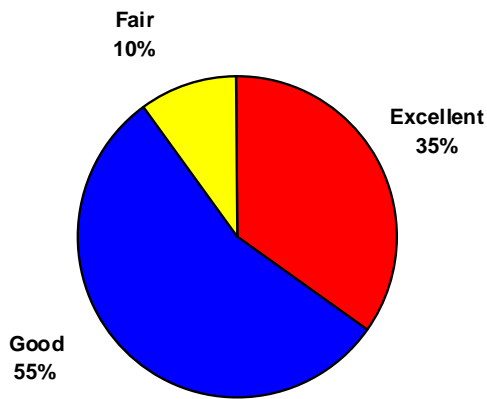


WORKER RELIABILITY

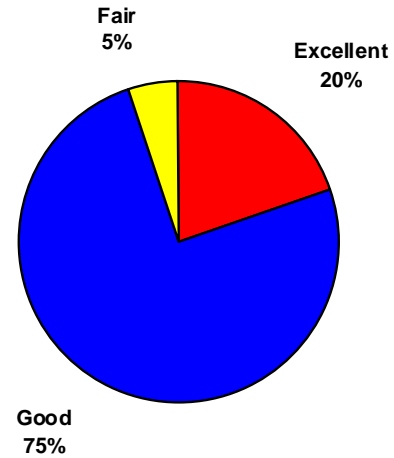


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA SOUTH REGION TOTAL WORKFORCE

WORKER ATTITUDES

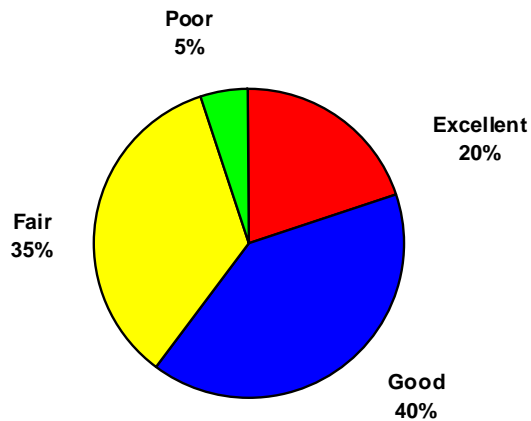


TEAMWORK SKILLS



The educational competencies of employees are additional factors used to evaluate an area's labor force. In the East Central Indiana South Region, 60% of the employers interviewed rated the local public schools as "Excellent" or "Good", and 65% 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

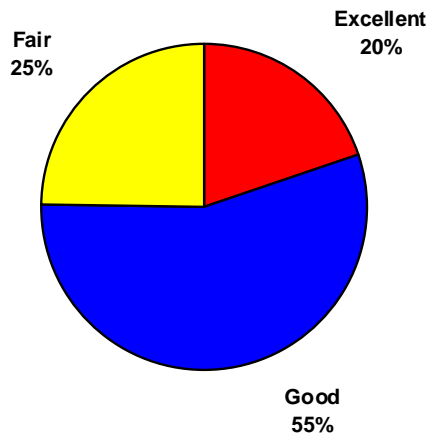


**LOCAL COMMUNITY COLLEGES
AND TECH SCHOOLS**

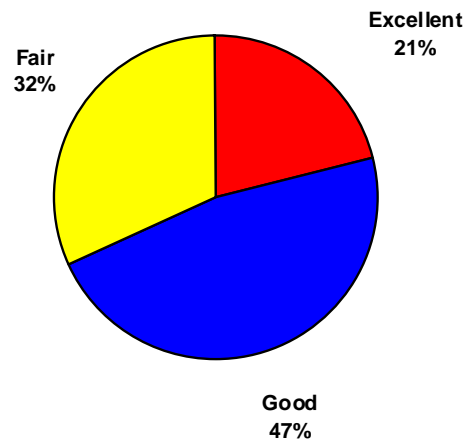


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA SOUTH REGION TOTAL WORKFORCE

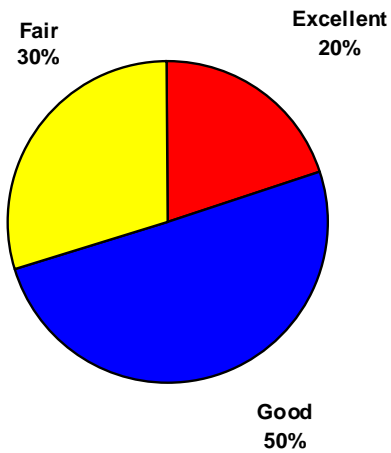
READING SKILLS



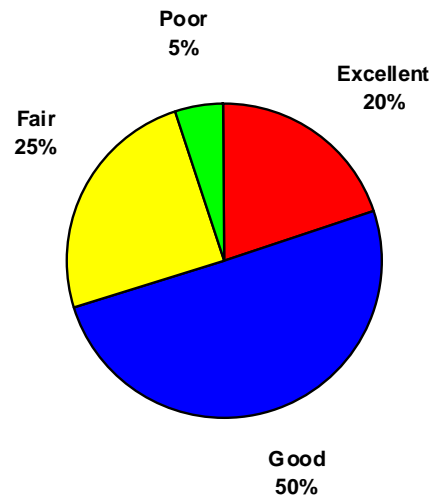
WRITING SKILLS



COMPUTER SKILLS

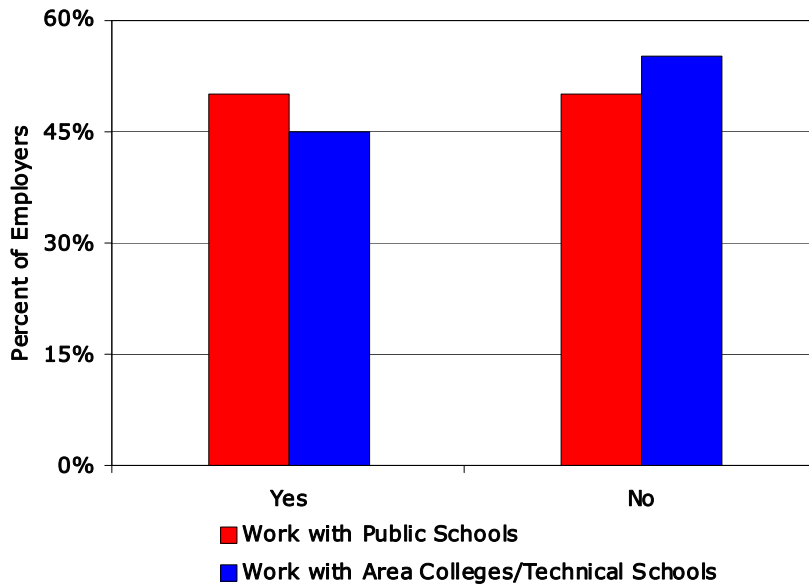


MATH SKILLS

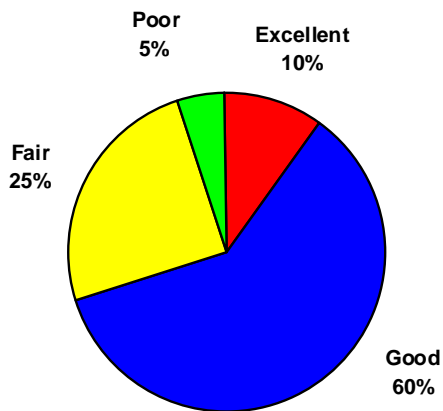


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA SOUTH REGION TOTAL WORKFORCE

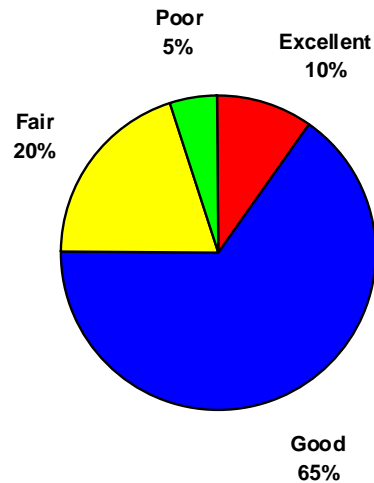
Additionally, many of the employers interviewed stated their companies worked with the area educational institutions in terms of apprenticeships, internships or other training programs.



WORKER ENTRY LEVEL SKILLS

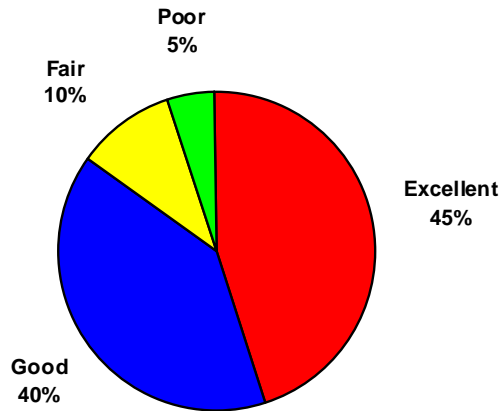


JOB READINESS SKILLS



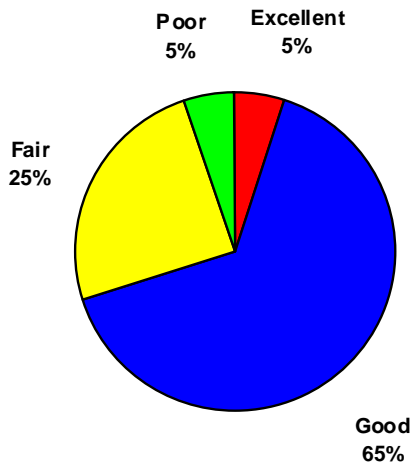
EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA SOUTH REGION TOTAL WORKFORCE

WORKER TRAINABILITY

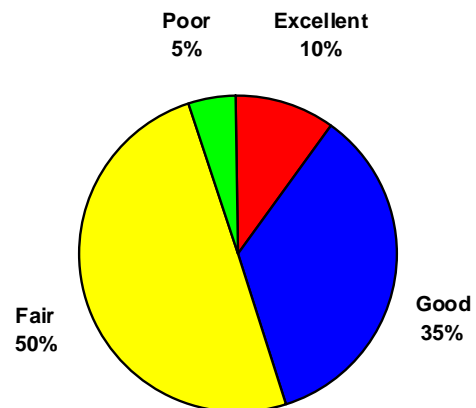


Further, the employers who were interviewed gave the following ratings to the area's business climate in terms of such factors as support and communication and also rated the area's overall quality of life. In addition, the employers offered their opinions on the availability of labor in the area.

AREA BUSINESS CLIMATE

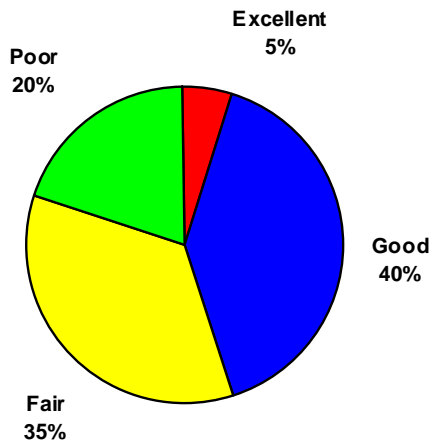


AREA QUALITY OF LIFE

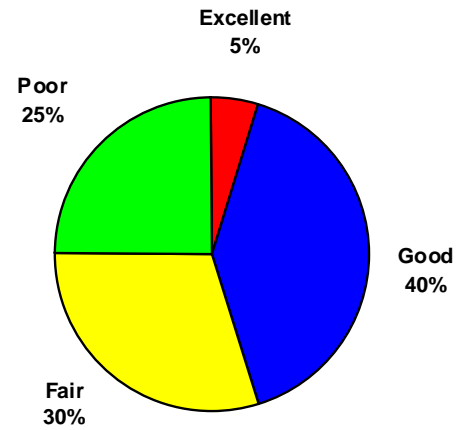


EMPLOYERS' VIEWS AND RATINGS OF THE EAST CENTRAL INDIANA SOUTH REGION TOTAL WORKFORCE

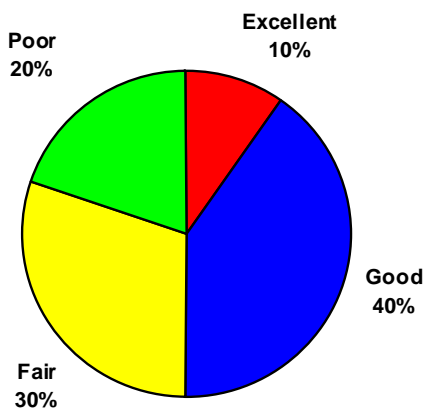
SKILLED WORKERS AVAILABILITY



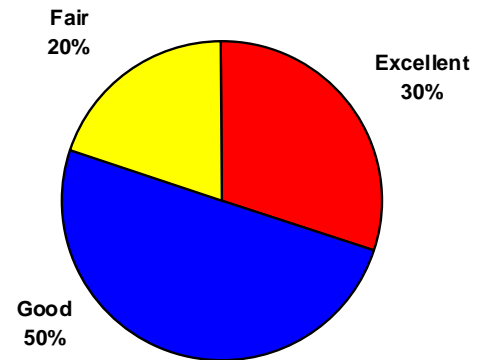
TECHNICAL WORKERS AVAILABILITY



PROFESSIONAL WORKERS AVAILABILITY



UNSKILLED WORKERS AVAILABILITY





THE PATHFINDERS

**P.O. Box 702317
Dallas, Texas 75370**

Telephone: 972-387-3750

E-Mail: info@thepathfindersus.com

Web site: www.thepathfindersus.com