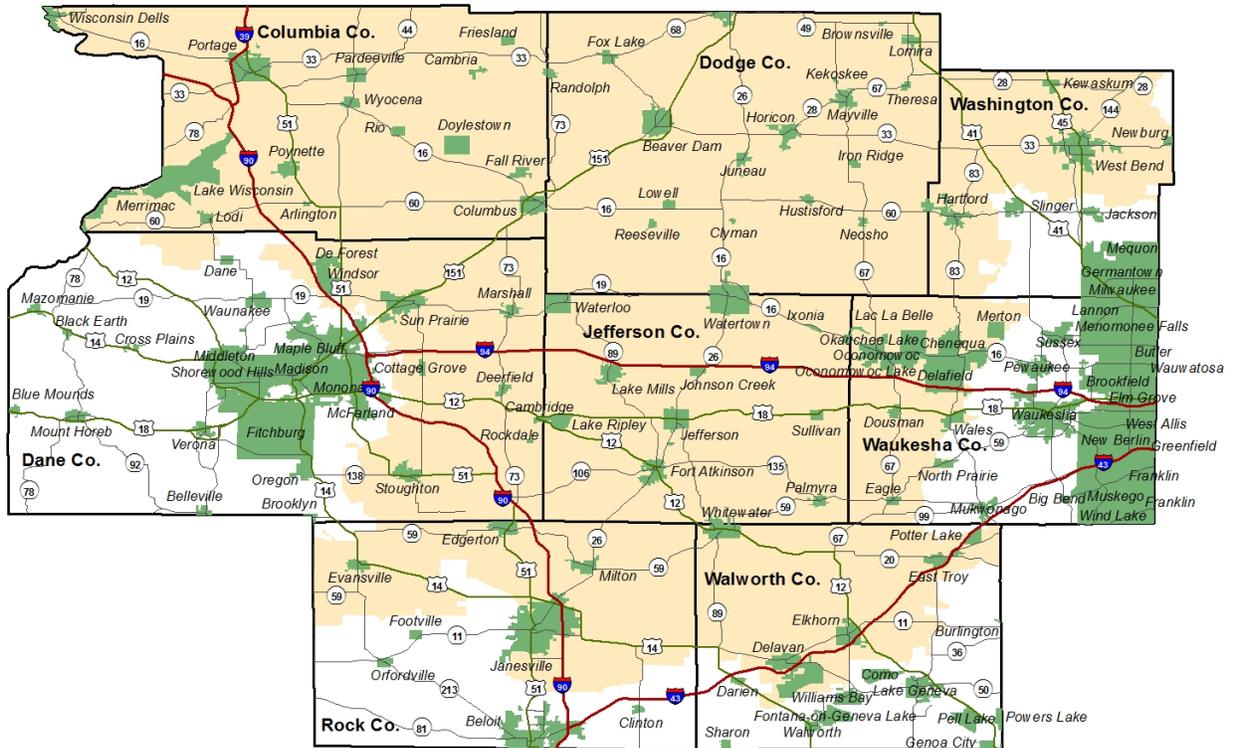


Jefferson County Labor Basin Labor Availability Analysis – 2018 With Emphasis on Manufacturing Employment

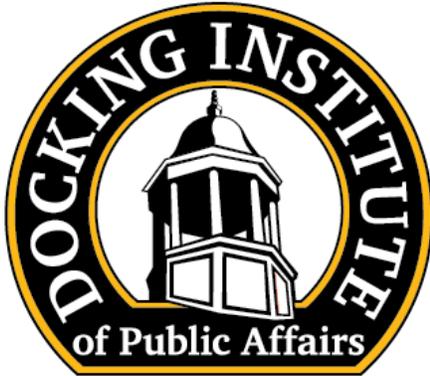
Columbia • Dane • Dodge • Jefferson • Rock •
Walworth • Washington • Waukesha Counties



Prepared For

**The Economic Development Administration (EDA)
for the completion of an Economic Adjustment Strategy (EDS)**





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Mission:

To Facilitate Effective Public Policy Decision-Making.

The staff of the Docking Institute of Public Affairs and its University Center for Survey Research are dedicated to serving the people of Kansas and surrounding states.

Jefferson County Labor Basin
Labor Availability Analysis – 2018
With Emphasis on Manufacturing Employment

Prepared By:

Michael S. Walker
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Prepared For:

The Economic Development Administration (EDA)
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Executive Summary

The Jefferson County Labor Basin includes all or portions of Columbia, Dane, Dodge, Jefferson, Rock, Walworth, Washington, and Waukesha Counties in Wisconsin. The purpose of this report is to assess the “Available Labor Pool” in this labor basin, with an emphasis on those interested in manufacturing employment. The “Available Labor Pool” represents those who are looking for employment or are interested in new jobs for the right employment opportunities.

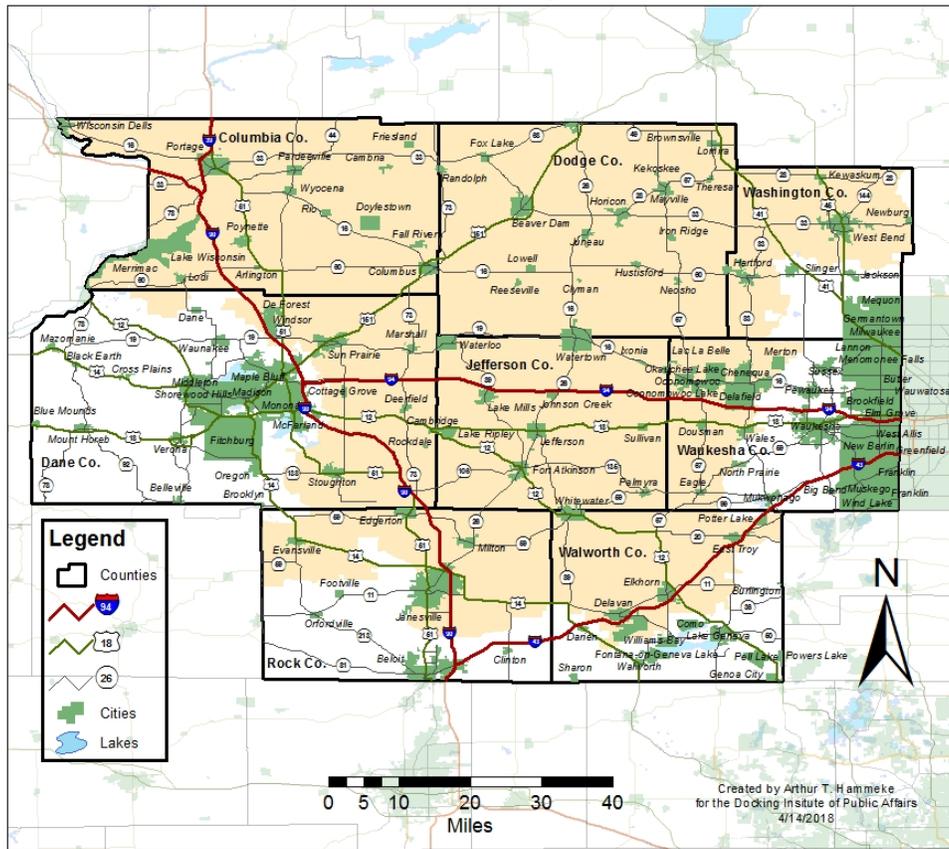
The Docking Institute’s independent analysis of this labor basin shows that:

- The population of the Jefferson County Labor Basin is 713,048. The Civilian Labor Force is 400,895. The Available Labor Pool contains 238,289 individuals.
- Of the *non-working* members of the Available Labor Pool, an estimated 14,556 (6.1%) are currently looking for work and 43,703 (18.3%) are interested in working for the right opportunities. Of the *working* members of the Available Labor Pool, 33,998 (14.3%) are currently looking for work, while 146,032 (61.3%) are interested in different jobs given the right opportunities.
- About four-fifths (80.6%) of the Available Labor Pool have at least some college experience and 98.7% have at least a high school diploma. The average age for members of the Pool is about 48 years old, and women make up nearly half (46%) of the Pool.
- Almost 20% of the Available Labor Pool are currently employed as general laborers, while an additional 6.1% work in government services or technical/highly skilled blue-collar occupations. About 30% of the Pool work in service sector jobs, while 19.3% work in professional white-collar jobs. About a quarter (24.5%) are not currently working.
- More than three-quarters (76.4%) of the Available Labor Pool are “willing to work outside of their primary field of employment for a new or different employment opportunity.”
- More than a third (36%) of the members of the Available Labor Pool will commute up to 45 minutes, one-way, for an employment opportunity, while 80% will commute up to 30 minutes for employment.
- An estimated 16,442 members (7%) of the Available Labor Pool are interested in a new job at \$10 an hour, 62,670 (26%) are interested at \$15 an hour, and 103,418 (43%) are interested at \$20 an hour.
- About 41% of the Available Labor Pool report having training or experience, and 48% report being interested in employment in manufacturing. Of those with manufacturing experience, 55% report working in production.
- The average age for those interested in manufacturing employment is about 50 years old, and 33.1% are women. Practically all (99.4%) have a high school diploma.
- The five most important benefits, for those interested in manufacturing employment are, in order: good salary/hourly pay, on-the-job (OJT) or paid training, good retirement benefits, good health benefits, and good vacation benefits.
- The mean average desired hourly wage for those willing to work in manufacturing in Jefferson County for a day shift job is \$25.12. The average hourly wage for the second shift is \$26.80. The average hourly wage for the third shift is \$29.00.

The Jefferson County Labor Basin

The Jefferson County Labor Basin includes all or portions of eight counties in Central Wisconsin (see Map 1 below). The criterion used to include a county in this labor basin is whether it contains communities from which, it can be reasonably assumed, individuals may commute to the center of the basin (The City of Jefferson) for an employment opportunity. In the case of the Jefferson County Labor Basin, it is reasonable that individuals may commute from (and within) the highlighted area because these counties contain 1) communities with adequate transportation to the center of the labor basin and 2) communities that are within a 45-minute commute to the center of the labor basin¹.

Map 1: Jefferson County Labor Basin



The Jefferson County Labor Basin has a total population of approximately 713,048, and a Civilian Labor Force of 400,895. The total number of employed is 386,460 and the average county unemployment rate was about 3.60% at the time of this study.

The Docking Institute's analysis suggests that the Jefferson County Labor Basin contains an Available Labor Pool of 238,289 individuals.

¹ Portion of Dane, Rock Walworth, Washington, and Waukesha are excluded from the labor region because Madison, Janesville, Beloit, the southern portion of Walworth County, and Milwaukee offer many job opportunities for workers and potential workers. It is reasonable to assume, that while some workers do indeed travel from these areas to the greater City of Jefferson area for work, many potential workers from those counties will find employment opportunities closer to home.

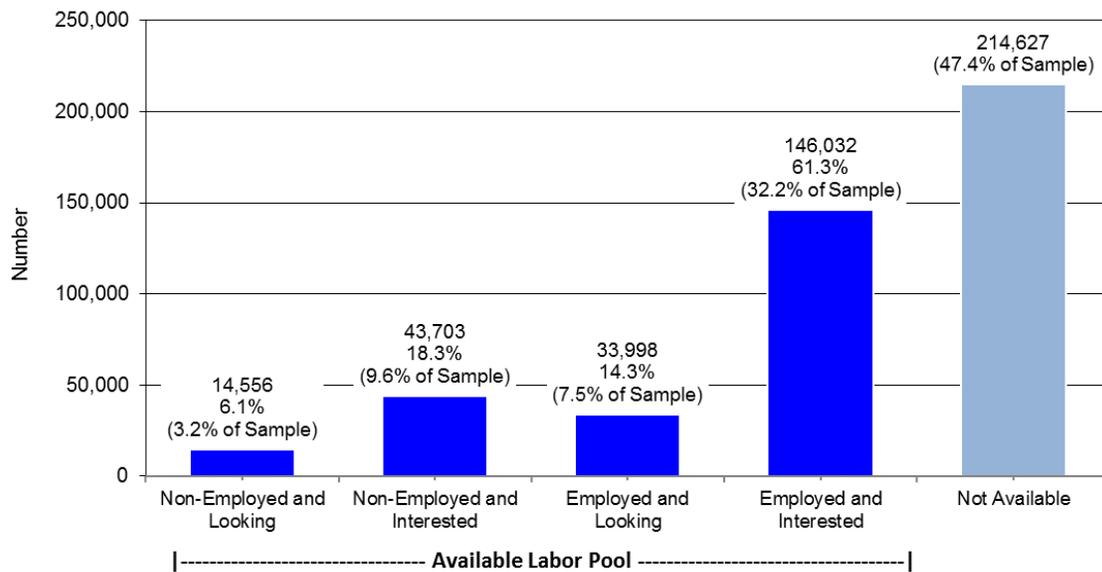
The Jefferson County Labor Basin’s Available Labor Pool

The Available Labor Pool is composed of workers categorized as either 1) currently not working *and* looking for employment, 2) not working *but* interested in employment, 3) currently working *and* looking for other employment, and 4) currently employed *but* interested in different employment for the right opportunities.

Figure 1 shows the extrapolated number of area adult residents that are members of the Available Labor Pool, as well as those that are not interested in a new or different job. The far right column shows that 47.4% of respondents are not available for a new or different job. The remaining 52.6% are members of the Available Labor Pool².

It is estimated that 14,556 (6.1%) members of the Available Labor Pool are non-employed³ *and* looking for employment, while 43,703 (18.3%) are non-employed *but* interested in a job for the right opportunities. In addition, 33,998 (14.3%) members of the Pool are employed *and* currently looking for different employment, while 146,032 (61.3%) are employed *but* interested in new employment for the right opportunities.

Figure 1: The Available Labor Pool for the Jefferson County Labor Basin



The Available Labor Pool is composed of workers categorized as either 1) currently not employed and looking for full-time employment, 2) currently not employed *but* interested in full-time employment, 3) currently employed *and* looking for full-time employment, 4) currently employed *but* interested in other full-time employment for the *right opportunities*.

² The figure shows percentages of the Available Labor Pool as well as percentages of the sample as a whole (shown in parentheses). For example, 6.1% of the Available Labor Pool is non-employed and looking for work, while this percentage is 3.2% for the entire sample of respondents.

³ The terms “non-employed,” “not employed,” and “non-working” refer to officially unemployed members of the Civilian Labor Force *and* any non-employed/non-working full-time students, homemakers, retirees, and disabled individuals who indicate they are available for employment but that might not be officially unemployed.

Table 1 shows the gender, age, and education levels of the 238,289-member Available Labor Pool. More than two-fifths (46%) of the Pool are women, and the average age is about 48 years old. Most (98.7%) have *at least* a high school diploma, four-fifths (80.6%) have *at least* some college experience, and almost half (48%) have *at least* a bachelor’s degree. More than a quarter (28.8%) speak Spanish, but most (78.9%) speak “only a little.”

Table 1: Age, Gender, and Education Levels of Available Labor Pool

Age Information		Age in 2017		
Range		18 to 70		
Mean Average		48		
Median Average		49		
Gender		Number	Percent	
Female		109,512	46.0	
Male		128,777	54.0	
Total		238,289	100	
Highest Level of Education Achieved		Number	Percent	Cumulative Percent
Doctoral Degree		5,438	2.3	2.3
Masters Degree		33,735	14.2	16.4
Bachelors Degree		75,200	31.6	48.0
Associates Degree		42,169	17.7	65.7
Some College (including current students)		35,525	14.9	80.6
High School Diploma		43,201	18.1	98.7
Less HS Diploma		3,022	1.3	100
Total		238,289	100	
"Do you speak Spanish?"		Number	Percent	
"Yes"		68,600	28.8	
<i>Speak Very Well</i>		6,041	8.8	
<i>Speak Fairly Well</i>		8,445	12.3	
<i>Speak Only a Little</i>		54,115	78.9	
			100	

} *These percentages represent portions of 28.8%*

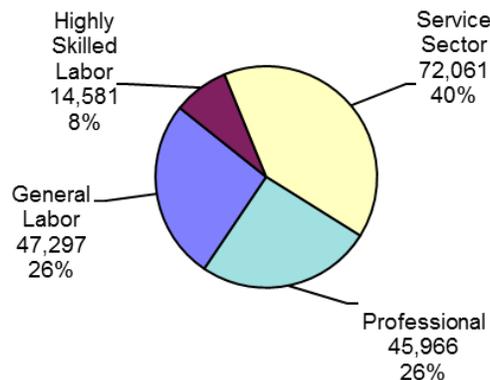
Table 2 shows the various occupational categories of the 238,289-member Available Labor Pool. General labor occupations represent 19.8% of the entire Available Labor Pool, while highly skilled, blue-collar jobs make up 6.1%. Traditional service-related occupations represent 30.2% of the Available Labor Pool, while professional occupations represent 19.3%. Non-employed members of the Pool make up 24.5% of the total.

Table 2: Major Occupational Categories of Available Labor

	Number	Percent	Years at Job	
			Mean	Median
General Labor/Delivery	21,404	9.0	12.0	7.0
Manufacturing/Maintenance/Trucking	25,893	10.9	12.3	10.0
Total General Labor	47,297	19.8	12.2	8.5
Mechanic/Welder/Comp Tech	8,136	3.4	13.7	10.2
Crew Management/Protection Services	6,444	2.7	13.3	13.7
Total Highly Skilled Labor	14,581	6.1	13.5	12.0
Customer Service	20,016	8.4	9.6	6.0
Clerical	7,818	3.3	10.8	6.6
Office or Dept Manager	13,759	5.8	12.6	10.0
Health Aid/Nurse	14,245	6.0	9.6	5.0
Education Aid/Teacher	16,224	6.8	11.6	9.6
Total Service Sector	72,061	30.2	10.8	7.4
Exec Management	14,479	6.1	11.8	10.0
Accounting/Engineering	18,356	7.7	12.8	10.0
Doctor/Professor/Attorney	7,867	3.3	17.0	16.0
Writer/Artist/Musician	5,265	2.2	9.6	5.0
Total Professional Sector	45,966	19.3	12.8	10.3
Homemaker/Student/Unemployed	24,328	10.2	n/a	n/a
Retired/Disabled	34,057	14.3	n/a	n/a
Total Non-Employed	58,385	24.5		
Total	238,289	100		

Figure 2 shows the occupational sectors of the *employed members* of the Available Labor Pool only. The *percentages* shown in Figure 2 differ from those presented in Table 2 because the table includes non-employed Available Labor Pool members.

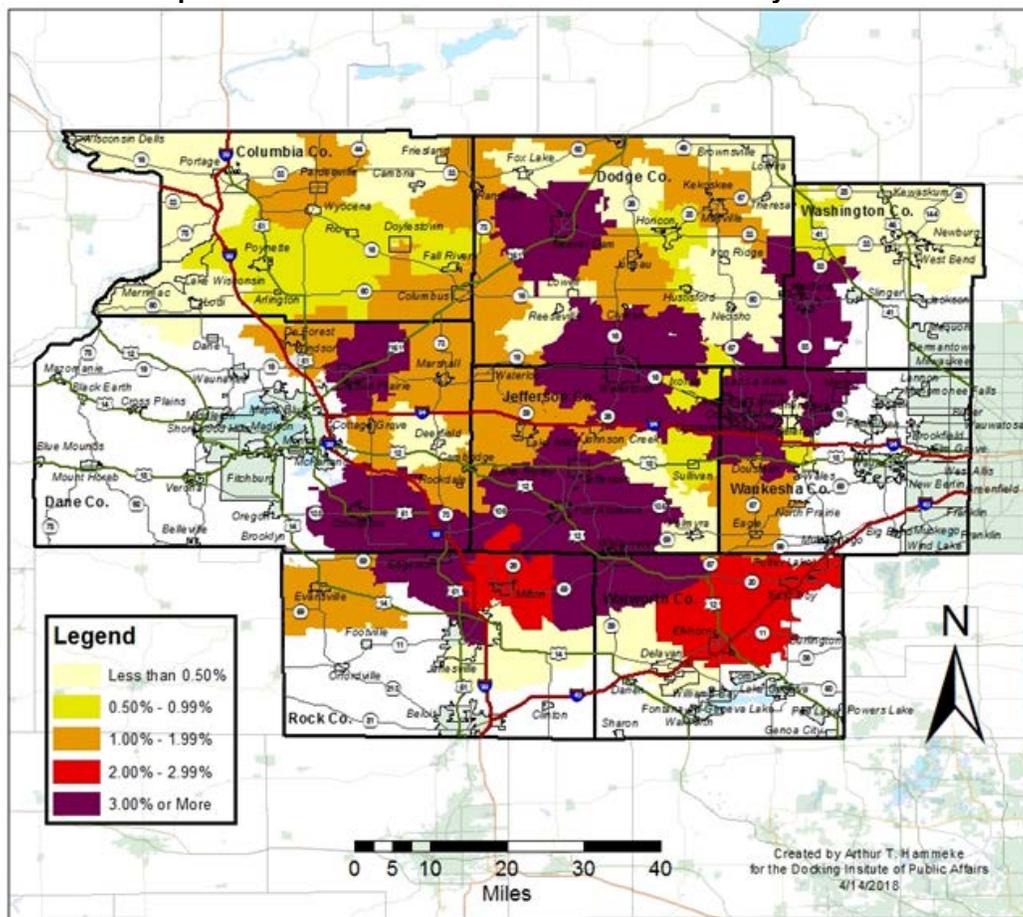
Figure 2: Occupational Sectors of Available Labor (Employed Only)



Map 2 shows how each ZIP code area compares to all other ZIP code areas in terms of the percent of total available labor in the Jefferson County Labor Basin. The map shows:

- Three percent or more of the entire labor basin's Available Labor Pool is located in ZIP code areas within Dane, Dodge, Jefferson, Rock, Walworth, Waukesha, and Washington counties. (See purple area in the map.)
- Between 2% and 2.99% of the entire labor basin's Available Labor Pool is located in ZIP code areas within Rock and Waukesha counties. (See red area in the map.)
- ZIP code areas in all counties except for Washington and Waukesha counties contain 1% to 1.99% of the basin's Available Labor Pool. (See orange areas in the map.)

Map 2: Percent of Total Available Labor in Basin by ZIP Code



Current Skills and Work Experience

To gain perspective on the types of workers that are available for new and/or different employment in the Jefferson County Labor Basin, survey respondents were asked questions assessing work skills and previous work experience.

Table 3 shows the number of workers currently employed in various job categories, as well as the number of workers and non-workers that have previous work or training experience in those same job categories. The table also shows the sum of working Available Labor Pool members currently employed in a job category *plus* those who indicate previous training or experience in that particular field.

For example, 15,013 members of the Pool are currently employed as general laborers, construction, cleaners, and similar positions. An additional 11,124 Pool members (employed and currently non-employed) had previous employment experience or training in one of those jobs, for a total of 26,137 individuals.

Table 3: Current Work Experience plus Previous Work or Training Experience

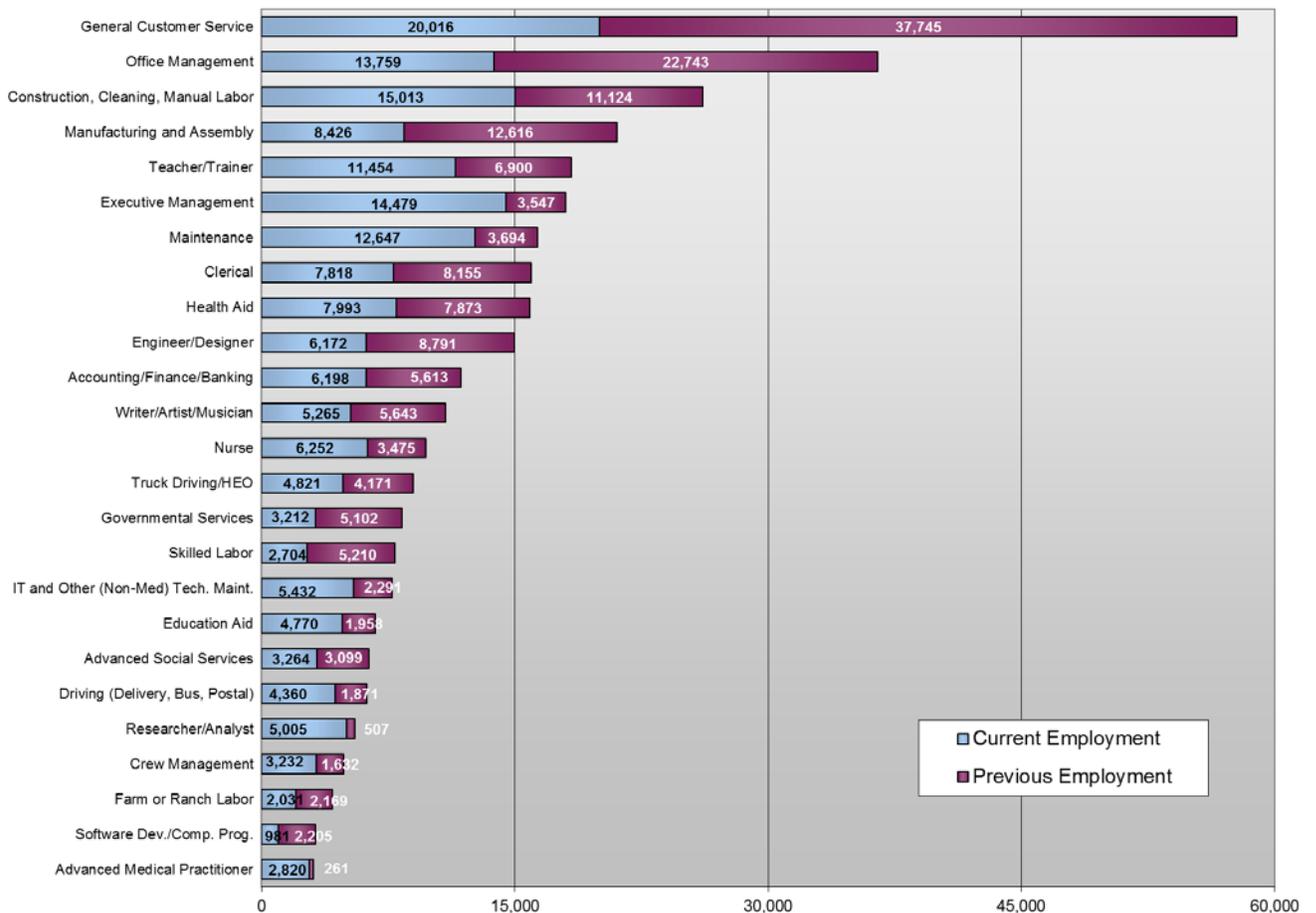
	Current Employment* Number +	Previous Work/Training Number =	Current plus Previous Work or Training** Number
Working with Hands			
Construction, Cleaning, Manual Labor	15,013	11,124	26,137
Farm or Ranch Labor	2,031	2,169	4,200
Manufacturing and Assembly	8,426	12,616	21,041
Maintenance	12,647	3,694	16,341
Driving (Delivery, Bus, Postal)	4,360	1,871	6,230
Truck Driving/HEO	4,821	4,171	8,992
Skilled Labor	2,704	5,210	7,914
Crew Management	3,232	1,632	4,865
Working with People			
General Customer Service	20,016	37,745	57,761
Office Management	13,759	22,743	36,502
Governmental Services	3,212	5,102	8,314
Executive Management	14,479	3,547	18,026
Advanced Social Services	3,264	3,099	6,362
Working with Numbers			
Clerical	7,818	8,155	15,973
Accounting/Finance/Banking	6,198	5,613	11,811
Researcher/Analyst	5,005	507	5,512
Working with Technology			
IT and Other (Non-Med) Tech. Maint.	5,432	2,291	7,723
Software Dev./Comp. Prog.	981	2,205	3,186
Engineer/Designer	6,172	8,791	14,962
Providing Health Services			
Health Aid	7,993	7,873	15,866
Nurse	6,252	3,475	9,728
Advanced Medical Practitioner	2,820	261	3,082
Providing Educational Services			
Education Aid	4,770	1,958	6,727
Teacher/Trainer	11,454	6,900	18,354
Professor/Lecturer	1,782	875	2,657
Creative Arts			
Writer/Artist/Musician	5,265	5,643	10,908
Total	179,905	169,271	349,175

* Retired, disabled, non-working students, homemakers are not included.

** An individual member of the Pool is counted only once within each employment category. If an individual's previous job is the same as the current job, he or she is not counted in the Previous Job Category.

Figure 3 shows the same information as that presented in Table 3, but in graphic format. Many Available Labor Pool members report current work experience or previous work/training as front desk clerks, retail sales positions, receptionists, and other jobs classified as “general customer service” workers. There are 20,016 working Pool members currently employed in this category and 37,745 previously employed/trained in this category, for a total of 57,761 individuals (total individuals not show on Figure 3).

Figure 3: Current Work Experience plus Previous Work or Training Experience



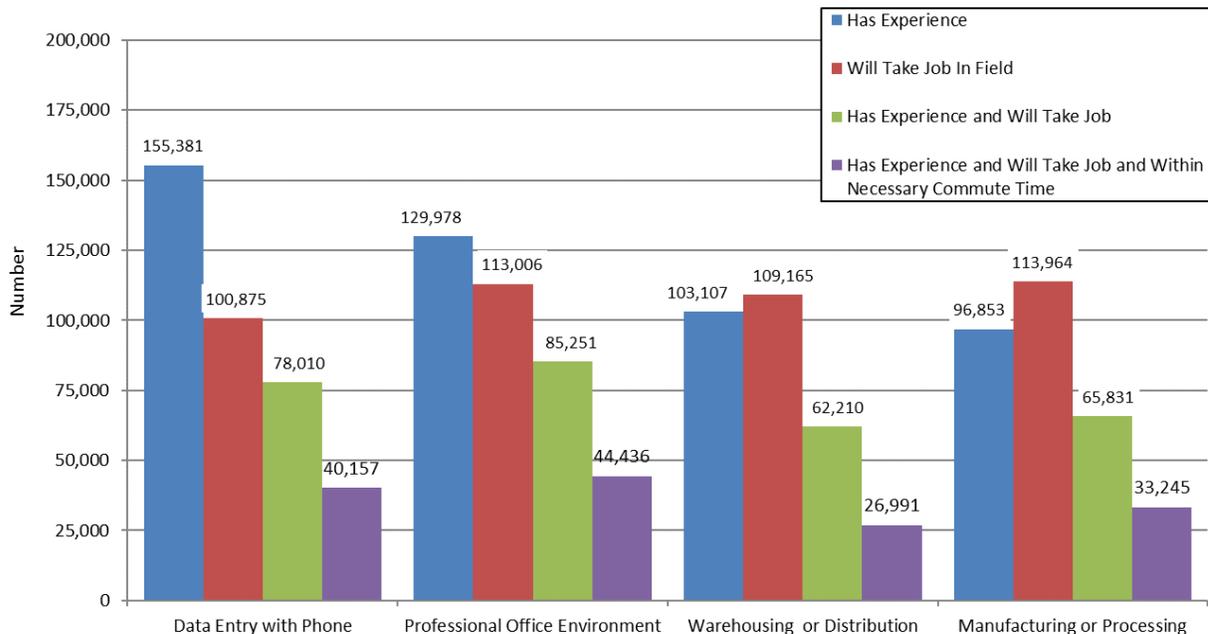
In addition to collecting data regarding the current employment status and previous work or training experience through a series of “open-ended” survey questions (the results of which are shown previously), respondents were asked about the four specific employment areas listed in Figure 4. Respondents were first asked if they had any training or work experience in a specific field and then if they would take a job in that field (regardless of their prior training or experience).⁴

The figure shows that an estimated 155,381 Pool members report any experience or training in data entry with telephone operation (blue column), while fewer (100,875 individuals) would consider employment in that field (red column). An estimated 129,978 members of the Pool have any experience or training as a professional office assistant (blue column), while fewer members of the Pool (113,006 individuals) would take a job in that field (red column).

The figure also shows responses for training or experience working in warehousing or distribution and manufacturing or processing.

The third column shows the estimated number that have any experience/training in a field **and** are willing to work in that field again (green column). The fourth column shows the estimated numbers that have any experience/training **and** are willing to take a job in that field **and** are within the necessary commute time (purple column). See page 19 for a definition of “necessary commute time.”

Figure 4: Work Experience / Willing to Work in Field



⁴ Figure 4 differs substantially from Table 3 and Figure 3 (previous pages). For example, the “has experience” column above represents an extrapolated total of **all** Pool members answering “yes” to the question “do you have any experience or training in...” As such, Figure 4 provides a “50,000-foot view” of the skill sets of Pool members. Table 3 and Figure 3, on the other hand, provide extrapolated responses from Pool members (working in the first column, working and non-working in the second) about specific jobs – one current job and/or one previous job.

Survey respondents with training or experience in warehousing or distribution or in manufacturing or processing were asked additional questions to assess the type of work they performed at those jobs.

Figures 4a, 4b, 4c show the responses to those questions. The figures show that about a third (36%) of those with warehousing experience worked in jobs involving moving materials or loading (see figure 4a). Half (50%) of those with manufacturing or processing experience worked in jobs involving production work directly (see figure 4b). Figure 4c shows that 40% of those with manufacturing experience worked in metallic manufacturing.

Figure 4a: Work Experience in Warehousing or Distribution

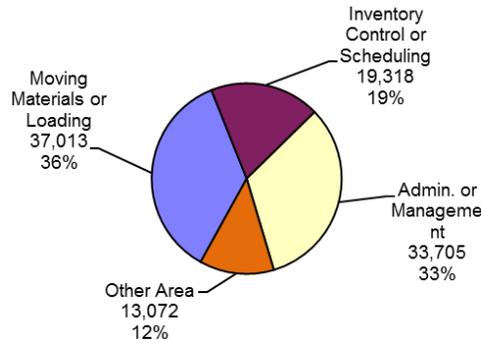


Figure 4b: Work Experience in Manufacturing or Processing

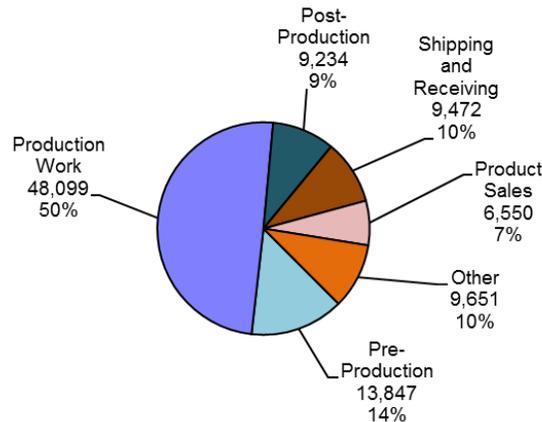
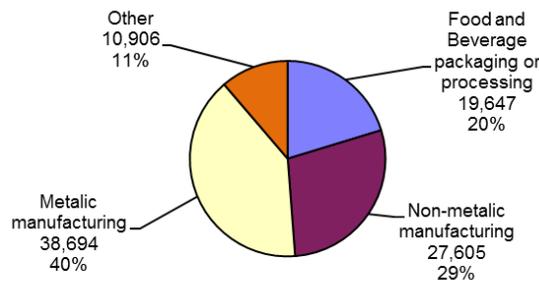


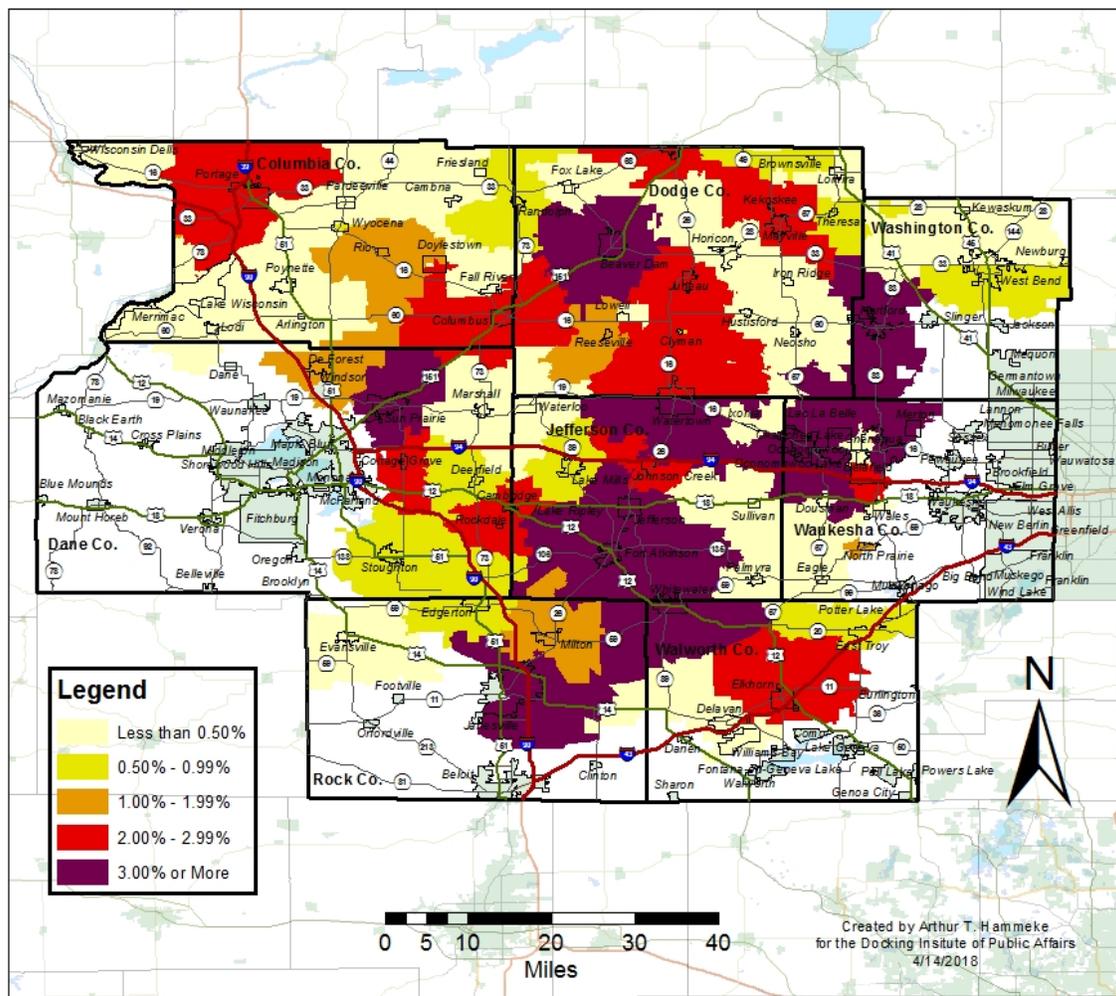
Figure 4c: Manufacturing Industry Experience



Working Available Labor Pool members were asked for the ZIP code of their workplaces. Map 3 shows the locations of workplaces employing Available Labor Pool members by ZIP code area. The map shows the following:

- Three percent or more of the working members of the Available Labor Pool work in ZIP code areas in Dane, Dodge, Jefferson, Rock, Walworth, Waukesha, and Washington Counties. (See purple areas in the map.)
- Between 2% and 2.99% of the working members of the Pool work in ZIP codes areas in Columbia, Dane, Dodge, Jefferson, Walworth, and Waukesha Counties. (See red area in the map.)
- Workplaces located in ZIP code areas in Columbia, Dane, Dodge, Jefferson, Rock, and Waukesha counties employ between 1% and 1.99% of the working Available Labor Pool. (See orange areas in the map.)

Map 3: Percent of Pool Member Workplaces by ZIP Code



Educational Experience and Job Satisfaction

Table 1 (see page 4) shows that 80.6% of the Available Labor Pool report some college experience (with 65.7% holding associate's degrees at least and 48% having completed a bachelor's degree at least).

Respondents that have at least some college experience or are currently enrolled in a community college, college, or university were asked to provide their major area of study. Answers are grouped into the following categories:

Social Sciences: Sociology, Psychology, Anthropology, Politics, and Social Work.

Biological Sciences and Health: Biology, Agriculture, Nursing, Pre-med, and Pre-vet.

Physical Sciences and Engineering: Physics, Geology, Chemistry, and Engineering.

Business and Economics: Management, Accounting, Finance, Marketing, and Economics.

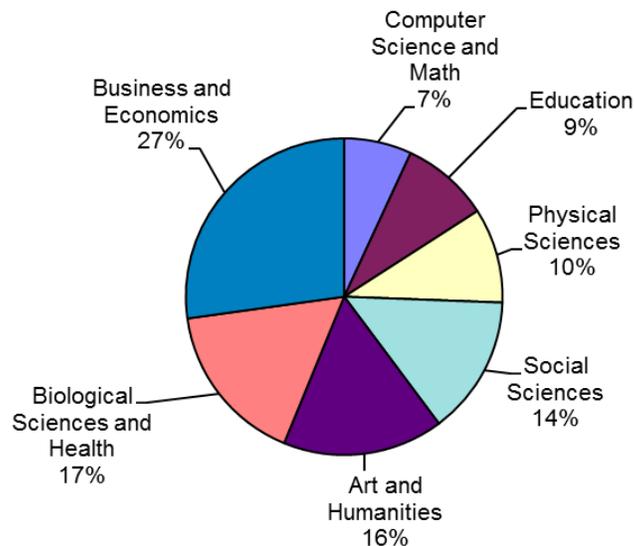
Education: Elementary and Secondary Teaching.

Computer Science and Math: Programming or Technology, Networking, Web Design, and Math.

Arts and Humanities: Art, Music, History, Philosophy, and Languages.

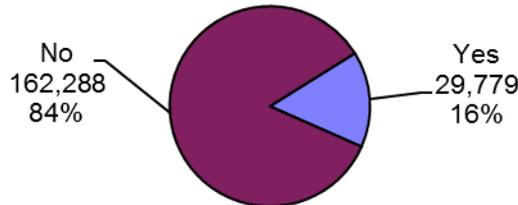
Figure 5 shows that Available Labor Pool members with at least some college experience indicate majors in business and economics (27%), biological sciences and health (17%), arts and humanities (16%), social sciences (14%), physical sciences (10%), education (9%), and computer science and math (7%).

Figure 5: Undergraduate College Major



All respondents that have completed at least some college were also asked: “Are you attending a community college or technical school now, or have you received a community college or technical degree?” Figure 6 shows that 16% of the respondents hold a community college or technical degree or are working on one at the present time.

Figure 6: Community College or Technical College Experience

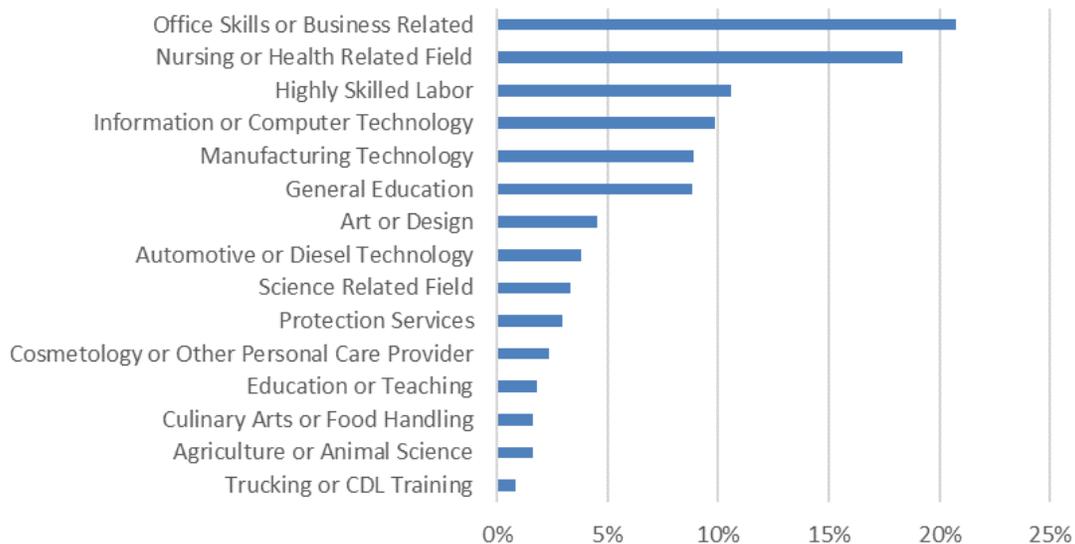


Respondents answering “yes” to the above question were asked for their area of study. Answer options are grouped into one of the options shown in Figure 6a.

The figure shows that about 21% report studying office skills or a business-related field, 18% report studying nursing or a health related field, and about 11% report studying for a highly skilled trade.

Almost 10% report studying information or computer technology, 9% report studying manufacturing technology, and 8% report taking general education courses.

Figure 6a: Community or Technical College Study Area



Considerations for Employment

An important consideration for many employers looking to locate or expand operations is whether workers are willing to pursue new employment opportunities. Some workers may be available for new employment but are unwilling to switch from their current job to a different type of position, for example. A large percentage of those unwilling to change their jobs might limit the types of employers that can enter the labor basin.

This does not seem to be the case for the Jefferson County Labor Basin. Figure 7 shows that a clear majority of the Available Labor Pool (182,113 members or 76.4%) are willing to accept positions outside of their primary fields of employment.

Figure 7: Considerations for Employment

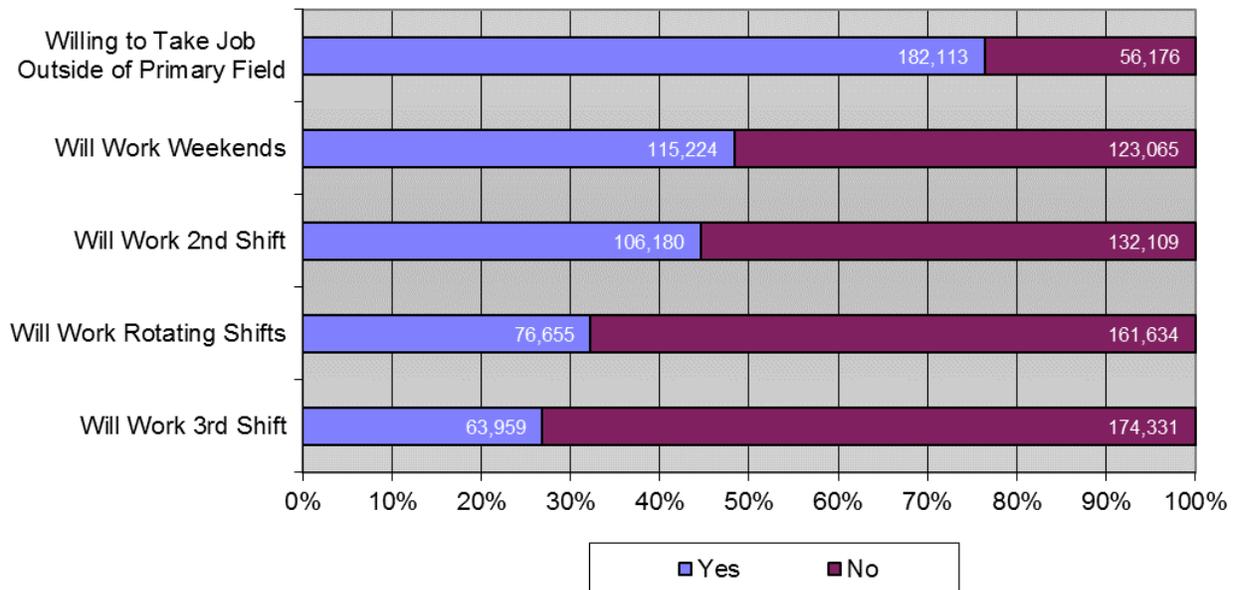
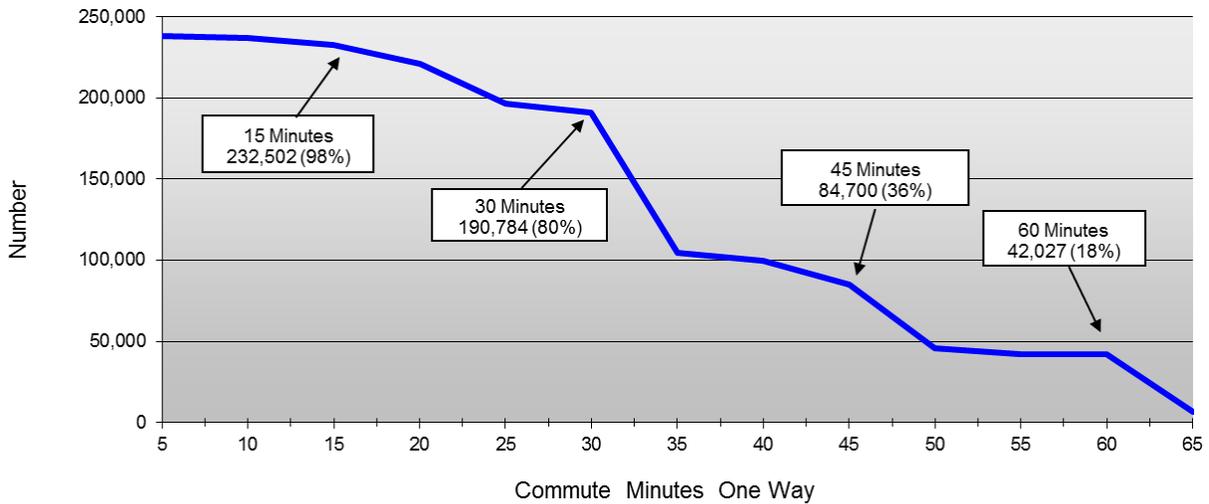


Figure 7 also shows responses to four questions regarding work shifts. Respondents were asked if they would be willing to work weekends, a 2nd shift, a 3rd shift, and/or rotating shifts for a new job.

The figure shows that almost half (48%) of the Available Labor Pool are willing to weekends, 45% of the Pool are willing to work the work second shift, 32% are willing to work rotating shifts, and about 27% are willing to working the third shift for a new or different job.

Another important consideration for many employers is whether workers are willing to commute for a new or different employment opportunity. Figure 8 shows that the Available Labor Pool in the Jefferson County Labor Basin is open to commuting. More than a third (36%) of the members of the Available Labor Pool will commute up to 45 minutes, one-way, for an employment opportunity, while 80% will commute up to 30 minutes, one-way, for employment. Nearly all (98%) will travel up to 15 minutes, one-way, for employment.

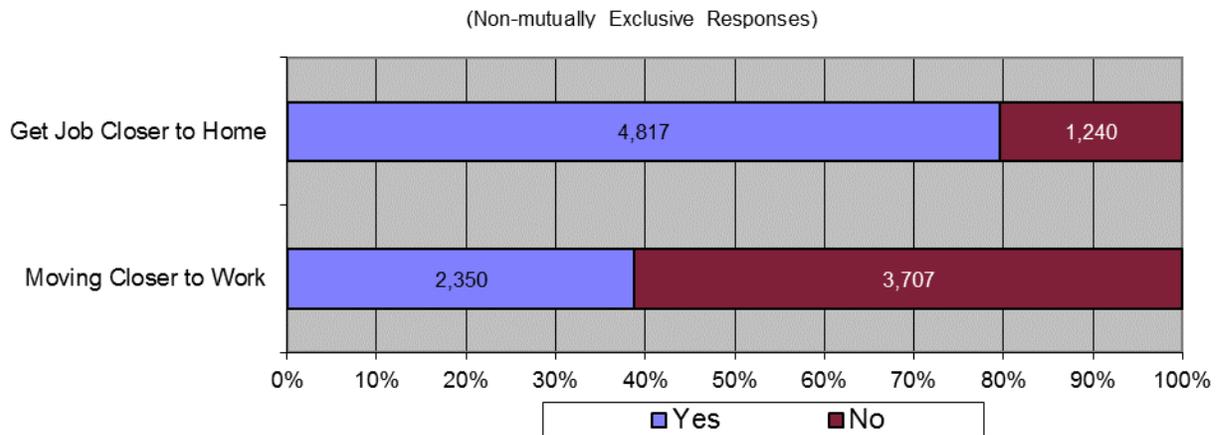
Figure 8: Available Labor by Commute Minutes



Working members of the Pool indicating a willingness to commute farther than 60 minutes, one-way, for a job, were asked two questions: “Have you considered moving to be closer to your job?” and “Have you considered getting a job closer to your home?”

Figure 8a shows that a vast majority (80%) of this (relatively small) subset of the Pool would consider getting a new job closer to their places of residence, while about 39% would consider moving closer to their places of work.

Figure 8a: Being Closer to Work



Available Labor Pool members were asked about various benefits that might be important when considering whether to take a new or different job. Respondents were asked if each benefit would be a “very important” consideration for taking a new job, with answer options including “yes” and “no.” (Responses are non-mutually exclusive.)

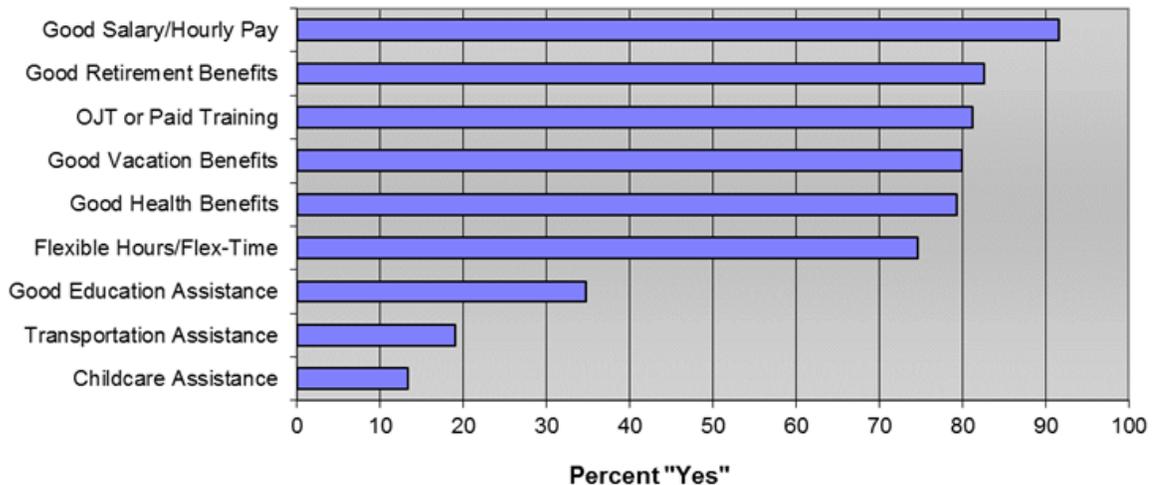
Figure 9 shows that the six most important benefits are, in order: good salary or hourly pay, good retirement benefits, on-the-job training (OJT) or paid training, good vacation benefits, good health benefits, and flexible hours or flex-time. All of these benefits are considered “very important” by 70% or more of the Available Labor Pool.

Good educational assistance follows with 35%.

Transportation assistance and childcare assistance are considered “very important” by 19%, and 13% of Pool members, respectively.

Figure 9: Benefits Very Important to Change Employment

(Non-mutually Exclusive Responses)



The left column in Table 4 shows the percentages of all Pool members, while the right column shows the percentages of *working members* of the Available Labor Pool that are offered the benefit from their current employers.

Flexible hours/flex-time stands out with a 13.2% difference between those Pool members considering this benefits very important (74.7%) and those working Pool members receiving this benefit (61.5%).

Good salary/hourly pay also stand out with a difference of 9.1%, with 91.6% of Available Labor Pool members considering this an important consideration for taking a new job, and 82.5% of working Pool members receiving this benefit.

Good education assistance stands out (with a difference of -18.9%) as a benefit less desirable than currently offered by employers, suggesting that employers already offer this benefit in sufficient quantities and/or that the labor pool is already highly educated.

Table 4: Desired Benefits and Current Benefits Offered

	Benefit Important to Change Jobs Percent	Benefit Currently Offered* Percent	<i>Difference</i>
Good Salary/Hourly Pay	91.6	82.5	9.1
Good Retirement Benefits	82.6	82.2	0.4
OJT or Paid Training	81.2	78.4	2.8
Good Vacation Benefits	80.0	82.8	-2.8
Good Health Benefits	79.3	84.2	-4.9
Flexible Hours/Flex-Time	74.7	61.5	13.2
Good Education Assistance	34.8	53.7	-18.9
Transportation Assistance	19.1	20.8	-1.7
Childcare Assistance	13.4	10.7	2.7

Desired Wages of Available Labor Pool

Desired wages are another important consideration for employers and economic developers. Figure 10 shows desired wages for members of the Available Labor Pool. It is estimated that 139,876 people (or 59% of the available labor) are interested in a new job at \$25 an hour⁵.

An estimated 103,418 (43%) members of the Pool are interested in new employment opportunities at \$20 an hour, while 62,670 (26%) are interested at \$15 an hour. Finally, an estimated 16,442 people (7%) are interested in a new job at \$10 an hour.

Figure 10: Available Labor by Desired Hourly Wage

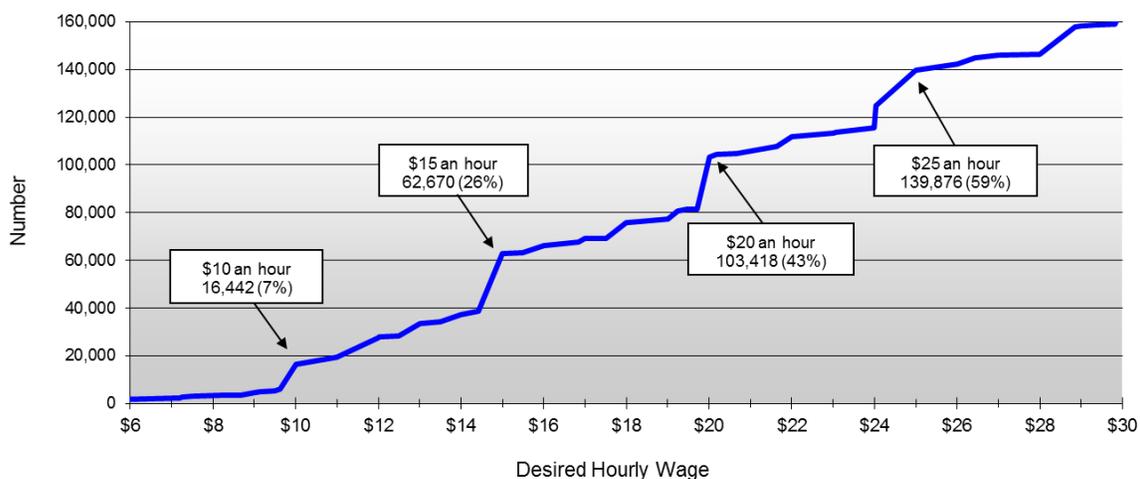


Figure 10 suggests the obvious: that the higher the wage, the larger the pool of available labor. As noted, 62,670 members of the Available Labor Pool are available for a new or different job at \$15 an hour. At \$14 an hour there are 37,173 members of the pool available. As such, an increase of \$1 per hour from \$14 to \$15 represents an increase of 25,497 workers and potential workers.

The graph also highlights various “wage preference plateaus” that may be of interest to current and potential employers to avoid. A wage preference plateau is a situation in which an increase in wage results in an insignificant or small increase in available labor. For example, 27,642 members of Pool are interested in a job at \$12 an hour. At \$13 an hour there are an estimated 33,599 individuals available. So, while there is certainly an increase in the number of available workers at this higher wage rate, the increase is only 3,574 individuals – a relatively small increase given the overall size of this subset of the Available Labor Pool.

Additional wage plateaus exist between \$15 and \$16 an hour (an increase of 3,574 individuals), and \$18 and \$19 an hour (an increase of 1,430 individuals), among other areas seen on the graph.

⁵ See Appendix for an hourly wage/annual salary conversion chart.

Within Necessary Commute Time

To present an even more refined picture regarding the number of workers who would seriously consider a new employment opportunity, the data in this section includes *only those respondents* that are determined to reside “within the necessary commute time.”

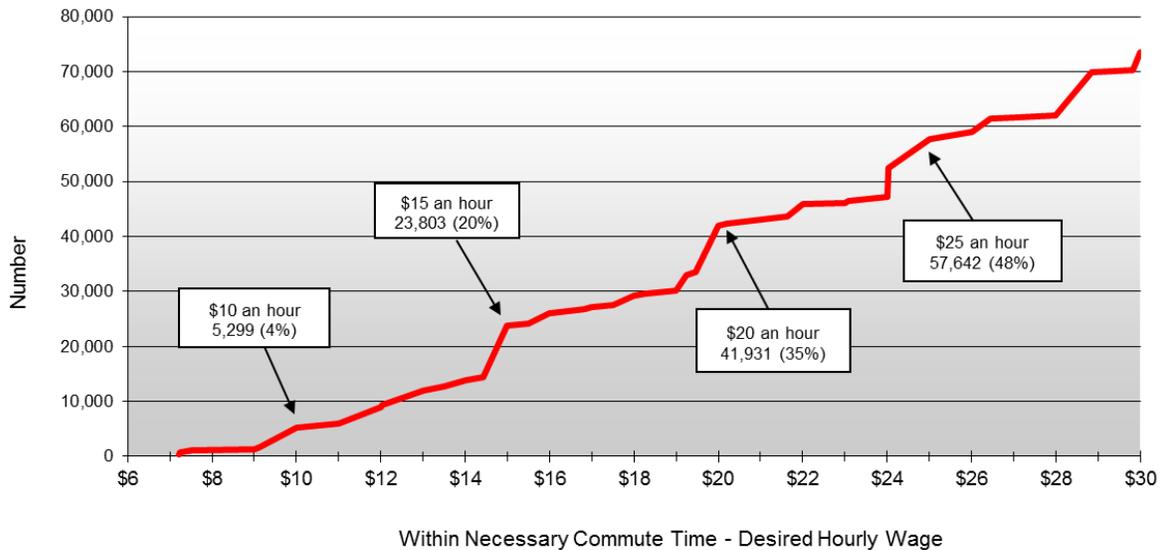
Necessary Commute Time is defined as a commute time stated by the respondent that is equal to or greater than the commute time necessary for the respondent to travel from his or her ZIP code of residence to the ZIP code at the center of the labor basin. For example, a respondent that is willing to travel for 30 minutes, one-way, for a new or different job opportunity and that lives an estimated 15 minutes from the center of the labor basin is considered to be “willing to travel the necessary commute time” for a new job.

Those within the necessary commute time number 121,061 individuals.

Desired Wages of those Within Necessary Commute Time

Figure 11 shows the wage demands for the Available Labor Pool members that are “within the necessary commute time.” An estimated 57,642 people (or 48% of this subset) are interested in a new job at \$25 an hour. An estimated 41,931 (35%) are interested in new employment opportunity at \$20 an hour, and 23,803 (20%) are interested in a new job at \$15 an hour. Finally, an estimated 5,299 people (4%) are interested in a new job at \$10.

Figure 11: Available Labor by Desired Hourly Wage (for those Within Necessary Commute Time)



Desired Wages by Occupational Sector for those within Necessary Commute Time

Table 5 shows the four main occupational sectors (employed only) of those within the necessary commute time subset of the Available Labor Pool.

The table shows that 9% of the general laborers will take a new or different job at a wage of at \$12 an hour, while 33% are available for new employment at a wage of \$18 an hour. Of the skilled laborers, none are available for new employment at a wage of \$12 an hour, while 9% are available at a wage of \$18 an hour.

Regarding service workers, 9% are available at a wage of \$12 an hour, while 38% are available at a wage of \$18 an hour. Of the professional workers, none are available at a wage of \$12 an hour nor 18% an hour. However, 10% are available for a wage of \$21 an hour.

Table 5: Cumulative Desired Wages by Occupational Sector

	General Labor		Highly Skilled Labor		Service Sector		Professional	
	(N= 70) (+/- 11.7% MoE)		(N= 24) (+/- 20.1% MoE)		(N= 116) (+/- 9.1% MoE)		(N= 88) (+/- 10.4% MoE)	
	<i>Number</i>	<i>Cumulative</i>	<i>Number</i>	<i>Cumulative</i>	<i>Number</i>	<i>Cumulative</i>	<i>Number</i>	<i>Cumulative</i>
\$30 <	23,200	100%	7,797	100%	38,214	100%	29,005	100%
\$30	17,605	76%	4,811	62%	25,707	67%	8,990	31%
\$27	16,289	70%	3,484	45%	23,732	62%	6,365	22%
\$24	12,340	53%	2,488	32%	19,124	50%	3,740	13%
\$21	11,024	48%	2,157	28%	18,465	48%	2,756	10%
\$18	7,569	33%	664	9%	14,483	38%	0	0%
\$15	4,278	18%	0	0%	7,900	21%	0	0%
\$12	1,974	9%	0	0%	3,291	9%	0	0%
\$9	329	1%	0	0%	987	3%	0	0%
\$6	0	0%	0	0%	329	1%	0	0%

Table 5 (previous page) shows data for working members of the Pool that are within the necessary commute time, with each occupational sector shown *independently* and excluding non-working pool members.

Table 6 (below) includes working service sector Pool members, working general labor Pool members, and non-working Pool members that are within the necessary commute time.⁶

Additionally, in Table 6, general laborers and service sector workers are classified in both sectors shown *if* they are willing to change fields of employment (see Figure 7, page 14).

In other words, Table 6 allows general laborers, service sector workers, and non-workers to “transfer” between employment sectors – providing much larger numbers of workers available for general labor and service sector jobs at various wages than is shown in Table 5.

Specifically, Table 6 *includes* data from respondents that:

- 1 are willing to commute the necessary distance from his/her community to the center of the labor basin, *and*
- 2 are willing to change their primary field of employment (for example: service sector employment to general labor employment), *and*
- 3a are currently non-employed, *or*
- 3b are employed as general laborers or service sector employees.⁷

Table 6: Cumulative Desired Wages Allowing for Transfer Between Sectors

	Allowing for Transfer Between Sectors			
	General Labor		Service Sector	
	(N= 205)	(+/-6.9% MoE)	(N= 219)	(+/- 6.6% MoE)
	Number	Cumulative	Number	Cumulative
\$30 <	67,312	100%	72,151	100%
\$30	50,854	76%	55,693	77%
\$27	45,917	68%	51,085	71%
\$24	36,701	55%	42,198	58%
\$21	33,738	50%	39,235	54%
\$18	22,218	33%	26,069	36%
\$15	12,343	18%	14,549	20%
\$12	6,419	10%	7,307	10%
\$9	1,152	2%	1,382	2%
\$6	329	0%	527	1%

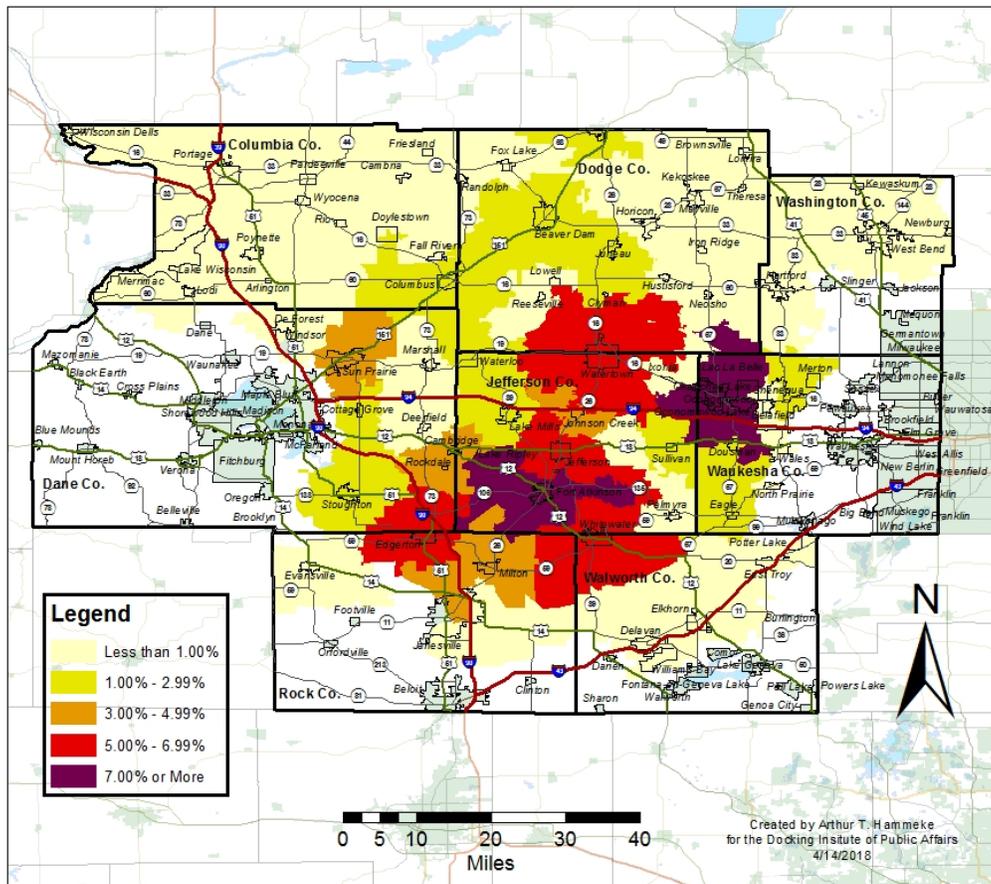
⁶ It is assumed that non-working Pool members will take jobs (all things being equal) in either general labor or service sectors.

⁷ Highly skilled blue-collar workers and professional white-collar workers are excluded from Table 6 because it is assumed that, as a general rule, people in occupations such as Doctors, Lawyers, Engineers, Professors, Machinists, Electricians, etc. are unlikely to transfer into lower-skill general labor and service/support occupations. In addition, it is assumed that, because professional and highly skilled occupations require extensive education and/or training, lower-skilled general laborers and service sector workers are unable to transfer to higher-skill labor or professional positions – at least in the near term.

Map 4 shows how each ZIP code area compares to all other ZIP code areas in terms of the percent of the *within the necessary commute time subset* of the Available Labor Pool. The map shows the following:

- Seven percent or more of this subset are located in ZIP code areas within Jefferson and Waukesha counties. (See purple area in the map.)
- Between 5% and 6.99% of this subset are located in ZIP code areas within Dane, Dodge, Jefferson, Rock, and Walworth counties. (See red area on the map.)
- ZIP code areas in Dane, Jefferson, and Rock counties contain 3% to 4.99% of this subset. (See orange areas in the map.)

Map 4: Percent within Necessary Commute Time by ZIP Code



Manufacturing Emphasis

The previous portion of the report addressed the entire Available Labor Pool. The remainder of the report addresses those members of the Available Labor Pool interested in manufacturing employment.

As shown on Figure 4 (page 9), 113,964 members of the Available Labor Pool are willing to take a job in manufacturing.

Table 7 shows the gender, age, and education levels of the subset of the 113,964 members of the Pool willing to work in manufacturing.

Two-thirds (66.9%) of this subset are men, and the average age is between 49 and 51 years old. Practically all (99.4%) have *at least* a high school diploma, three-quarters (75.7%) have *at least* some college experience, and about a third (37.8%) have *at least* a bachelor's degree. More than a quarter (28.5%) speak Spanish, but most (76.7%) speak "only a little."

Table 7: Age, Gender, and Education Levels of Those Interested in Manufacturing

Age Information		Age in 2017		
Range		18 to 66		
Mean Average		49		
Median Average		51		
Gender		Number	Percent	
Female		37,753	33.1	
Male		76,210	66.9	
Total		113,964	0	
Highest Level of Education Achieved				Cumulative Percent
Doctoral Degree	1,257	1.1		1.1
Masters Degree	9,923	8.7		9.8
Bachelors Degree	31,911	28.0		37.8
Associates Degree	24,488	21.5		59.3
Some College (including current students)	18,732	16.4		75.7
High School Diploma	26,960	23.7		99.4
Less HS Diploma	693	0.6		100
Total		113,964	0	
"Do you speak Spanish?"		Number	Percent	
"Yes"	32,427	28.5		
<i>Speak Very Well</i>	3,381	10.4	} These percentages represent portions of 28.5%	
<i>Speak Fairly Well</i>	4,169	12.9		
<i>Speak Only a Little</i>	24,877	76.7		
				100

Considerations for Manufacturing Employment

Figure 12 shows consideration for employment for the 113,964 members of the Available Labor Pool are willing to take a job in manufacturing.

The figure shows that a clear majority (85%) of the Available Labor Pool members interested in manufacturing employment are willing to accept positions outside of their primary fields of employment.

The figure also shows that about 56% of this subset are willing to work weekends for a new manufacturing job, 54% will work a second shift, 38% will work rotating shifts, and 34% will work a third shift.

Figure 12: Considerations for Employment – Manufacturing

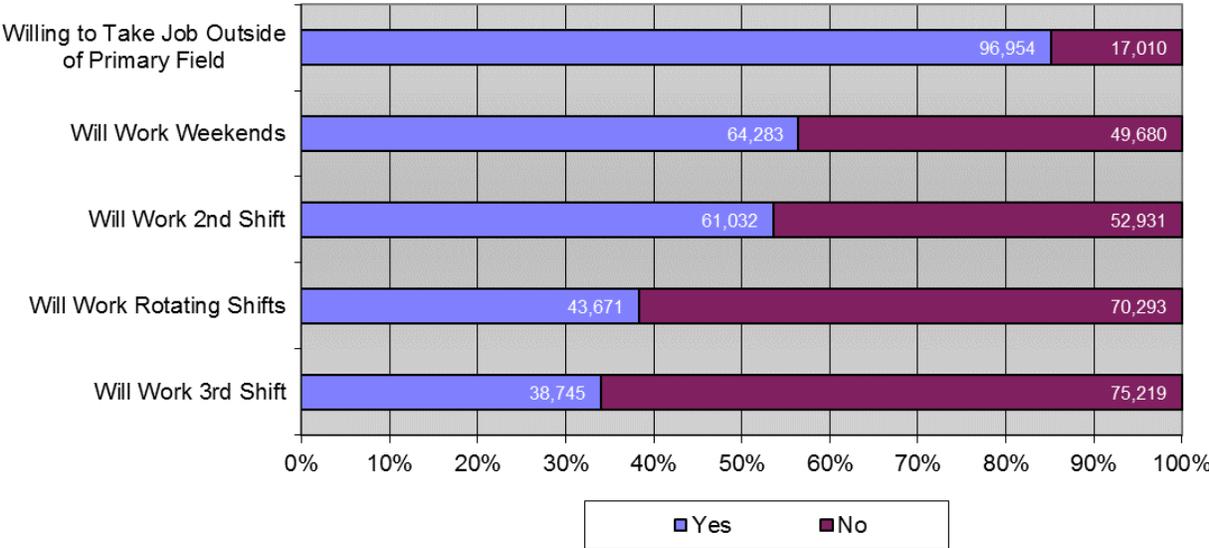


Figure 13 shows that Available Labor Pool members willing to work in manufacturing in the Jefferson Labor Basin are generally open to commuting.

More than a third (38%) of the members of the Available Labor Pool will commute up to 45 minutes, one-way, for an employment opportunity, while 83% will commute up to 30 minutes, one-way, for employment. A vast majority (97%) will travel up to 15 minutes, one-way, for employment.

Figure 13: Available Labor by Commute Minutes - Manufacturing

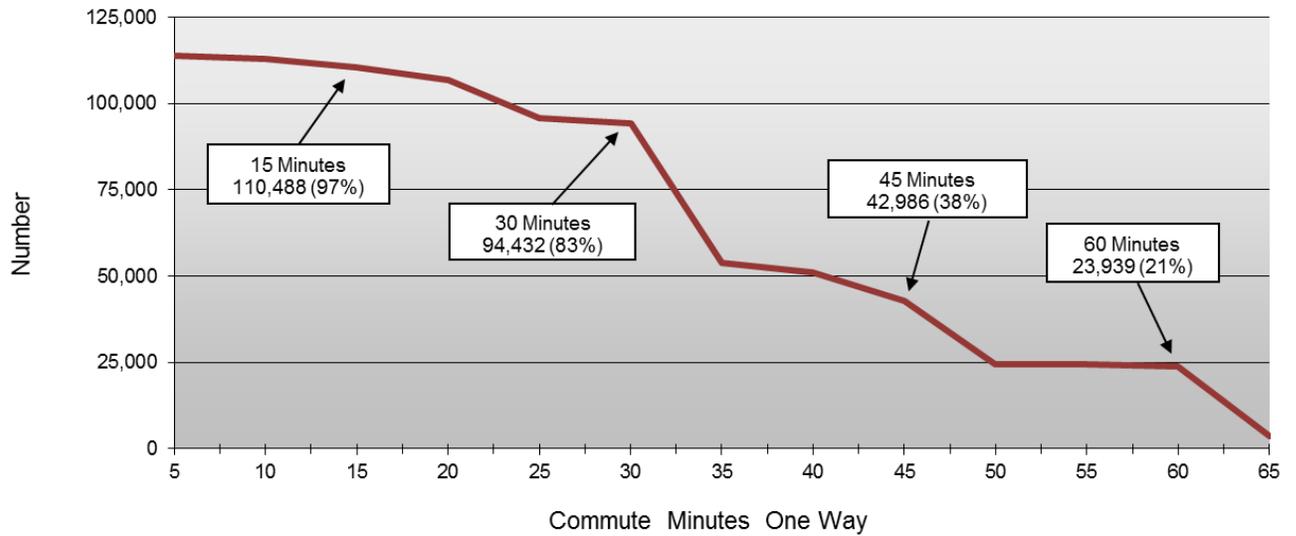


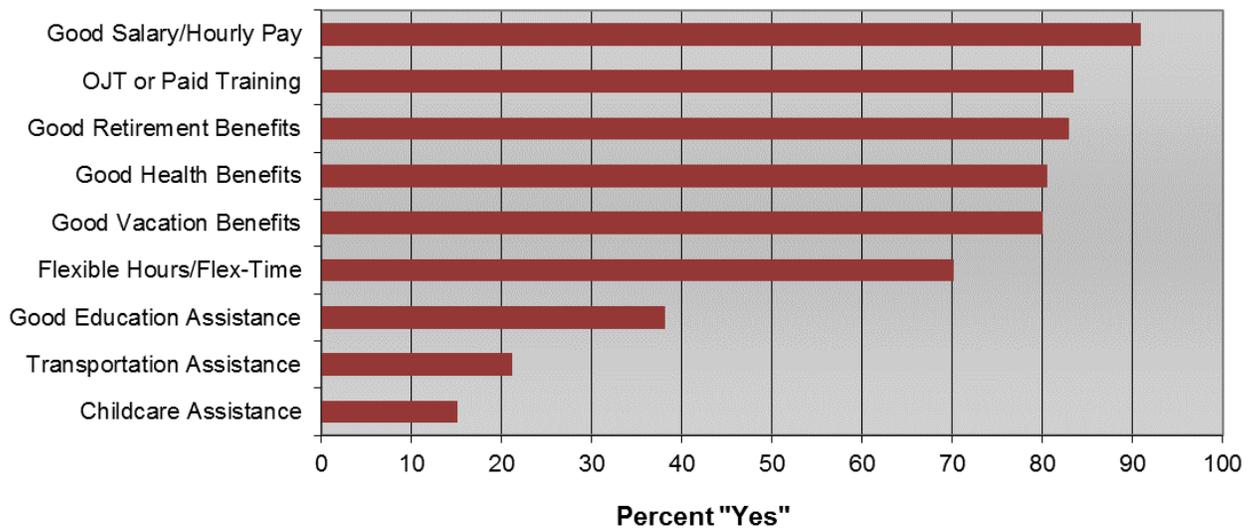
Figure 14 shows that the five most important benefits are, in order: good salary/hourly pay, on-the-job (OJT) or paid training, good retirement benefits, good health benefits, and good vacation benefits. All five of these benefits are considered “very important” by 80% or more of the Available Labor Pool members willing to work in manufacturing.

Flexible hours or flex-time is considered “very important” by 70% of the Available Labor Pool members willing to work in manufacturing.

Good educational assistance, transportation assistance, and childcare assistance are considered “very important” by about 38%, 21%, and 15% of this subset of the Available Labor Pool, respectively.

Figure 14: Benefits Very Important to Change Employment - Manufacturing

(Non-mutually Exclusive Responses)



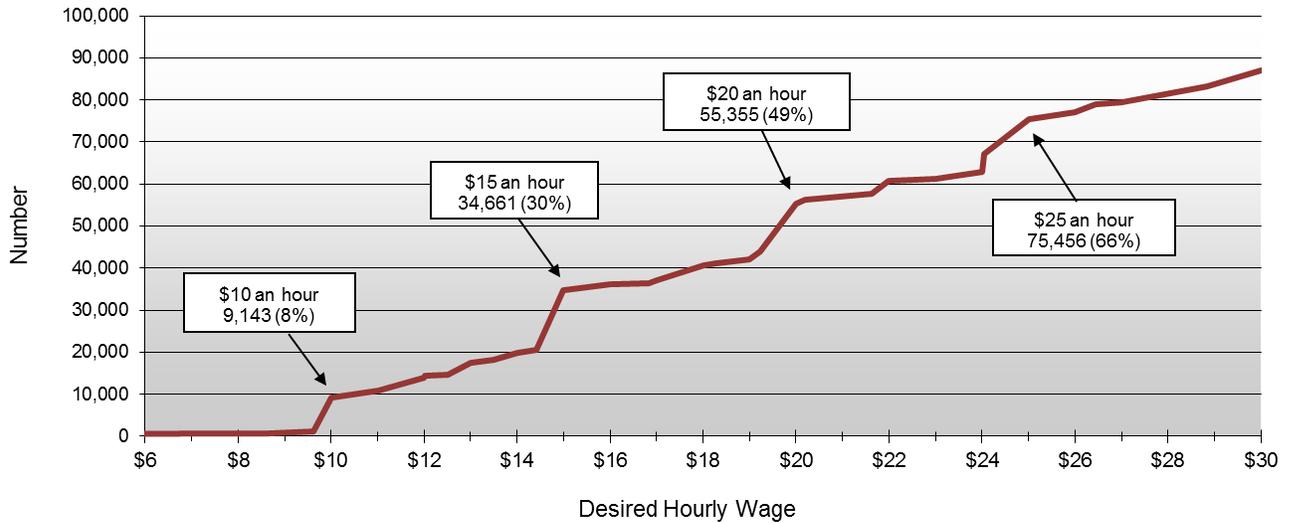
Desired Wages among Those Interested in Manufacturing Employment

Desired wages are another important consideration for employers and economic developers. Figure 15 shows desired wages for members of the Available Labor Pool.

It is estimated that 75,456 members of the Available Labor Pool interested in manufacturing employment (or 66%) are interested in a new job at \$25 an hour.

An estimated 55,355 (49%) members of the Pool are interested in new employment opportunities at \$20 an hour, while 34,661 (30%) are interested at \$15 an hour. Finally, an estimated 9,143 people (8%) are interested in a new job at \$10 an hour.

Figure 15: Available Labor by Desired Hourly Wage - Manufacturing



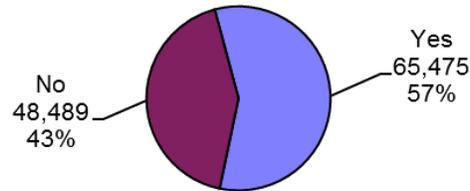
Willing to Work in Manufacturing in Jefferson County

Survey respondents were asked if they would take a job in Jefferson County.

The subset of Available Labor Pool member willing to work in manufacturing and in Jefferson County are estimated to number 65,475 individuals from the eight counties in the labor basin, as shown in Figure 16.

The figure shows that more than half (57%) of Available Labor Pool members interested in working in manufacturing report that they are willing to work in Jefferson County.

Figure 16: Will Work in Manufacturing in Jefferson County



Considerations for Employment among Those Willing to Work in Manufacturing in Jefferson County

Figure 17 shows the number of minutes members of this subset are willing to commute, one way, to Jefferson County for a job in manufacturing.

Not quite half (46%) of the members of the Available Labor Pool will commute up to 45 minutes, one-way, for an employment opportunity, while 89% will commute up to 30 minutes, one-way, for employment. All (100%) will travel up to 15 minutes, one-way, for employment.

Figure 17: Commute Minutes for Those Willing to Work in Manufacturing in Jefferson County

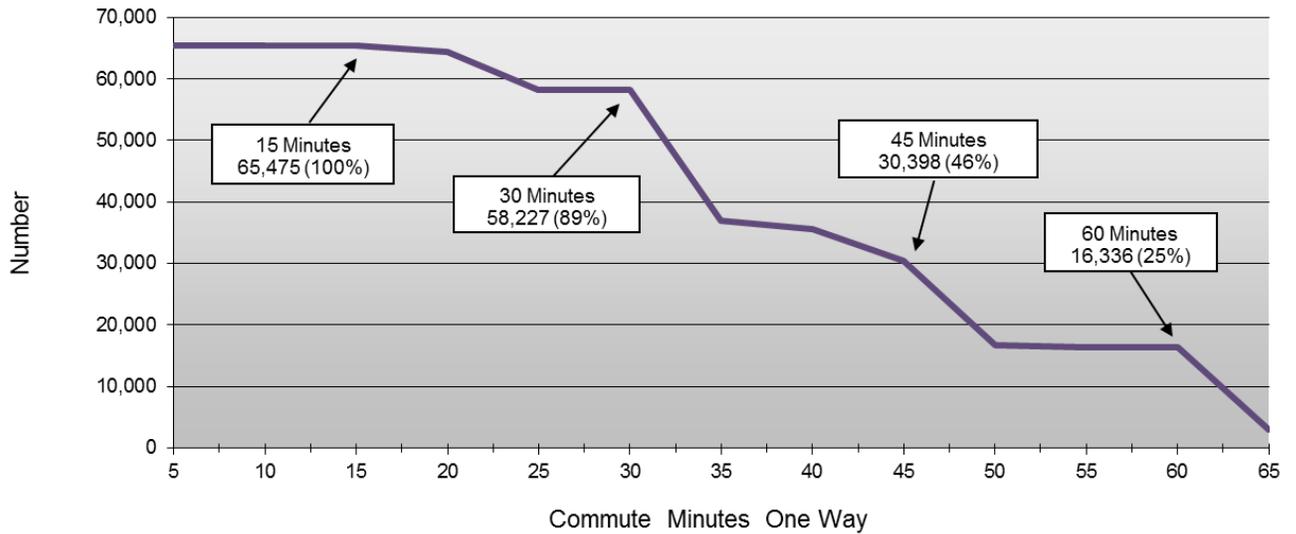
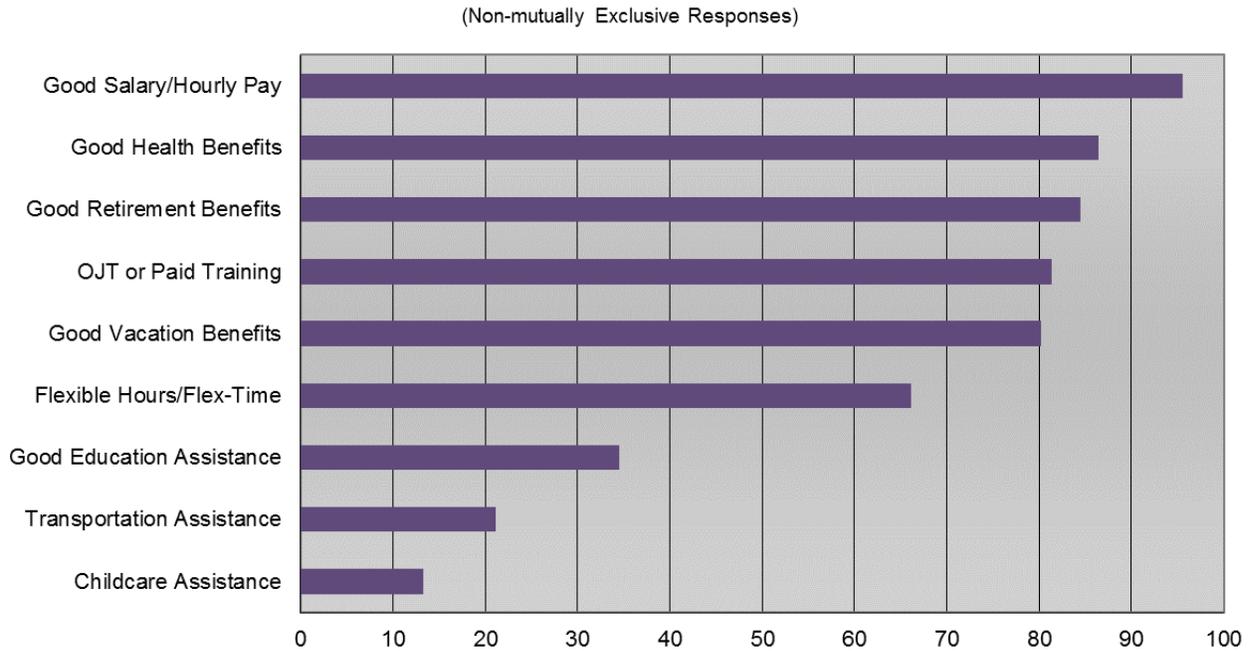


Figure 18 shows desired benefits for those willing to take a job in manufacturing and also work in Jefferson County. The table shows that the five highest ranked benefits are good salary/hourly pay, good health benefits, good retirement benefits, on-the-job (OJT) or paid training, and good vacation benefits. All of these benefits are considered important benefits for new job by at least 80% of the Available Labor Pool members willing to work in manufacturing in Jefferson County.

Figure 18: Desired Benefits for Those Willing to Work in Manufacturing in Jefferson County



Desired Wages among Willing to Work in Manufacturing in Jefferson County for Various Shifts

Desired wages are shown in Figure 19 for three work shifts. The work shifts are the Day Shift, the Second Shift, and the Third Shift.

More available labor is willing to work the day shift in both groups across all wage levels.

Figure 19: Desired Hourly Wage for Those Willing to Work in Manufacturing in Jefferson County by Work Shift



Table 8 shows the mean and median average desired hourly wage for those willing to work in manufacturing and in Jefferson County for various shifts.

The table shows that the average wages are lowest for those willing to work the day shift, followed by the second shift and the third shift.

Table 8: Mean and Median Average Wage for Those Willing to Working in Manufacturing in Jefferson County

	Average Hourly Wage	
	Mean	Median
Day Shift	\$25.12	\$20.00
Second Shift	\$26.80	\$22.00
Third Shift	\$29.00	\$23.00

Available Labor Pool Member Not Interested in Manufacturing Employment or Not Interested in Working in Jefferson County

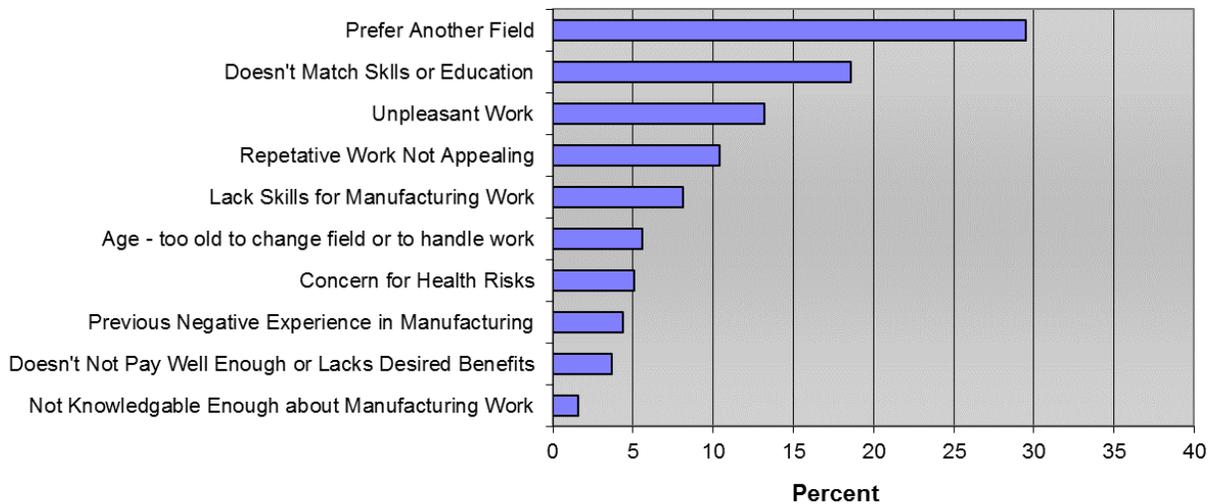
This section of the report addresses those members of the Available Labor Pool not interested in manufacturing employment, as well as those not willing to work in Jefferson County.

Figure 20 provides the reasons given for not wanting to work in manufacturing, among members of the Jefferson County Labor Basin's Available Labor Pool.

Almost 30% percent of those providing reasons, reported that they prefer to work in another field. About 19% reported that their educations or skill levels discourage them from taking a job in manufacturing. An additional 13% reported that they feel the work is unpleasant, hot, or too physically demanding. About 10% reported that the work is too repetitive.

About 8% reported that they felt that they lacked the skills or training necessary to accept a manufacturing job.

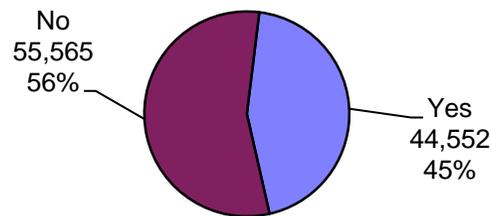
Figure 20: Reasons for Not Wanting to Work in Manufacturing



Available Labor Pool members who reported being interested in working in manufacturing but not being interested in working in Jefferson County and NOT residing in Jefferson County were asked if transportation presented a barrier for doing so.

Figure 21 shows that 45% reported that transportation is a barrier for working in a manufacturing job in Jefferson County.

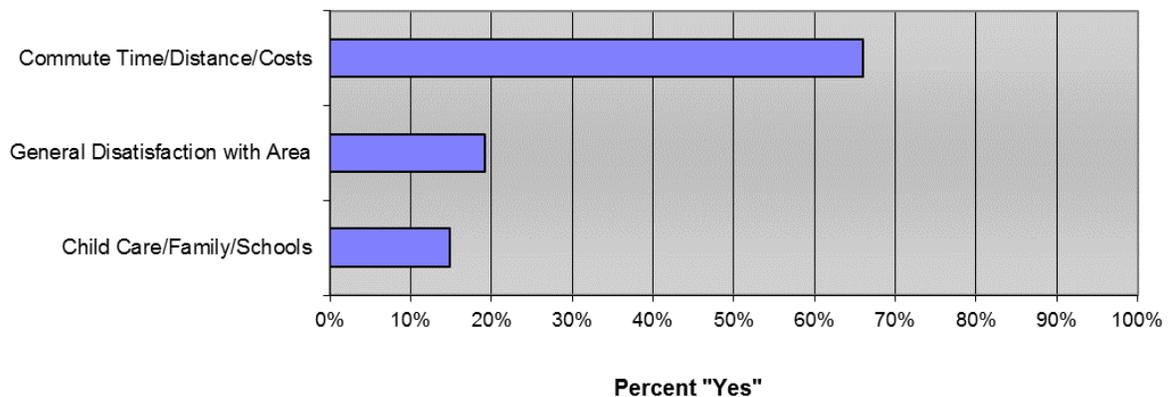
Figure 21: Transportation Barrier for Working in Jefferson County



Survey respondents interested in a manufacturing job but not in Jefferson County were asked if other barriers prevented them from working. About 60 responses were provided, and they are collapsed into the three categories shown in Figure 22.

The majority of respondents provided issue relating to transportation, such as commute time, distance, and travel costs. Other items mentioned can be grouped into “general dissatisfaction with the area and having child care, family issues, or not wanting to change schools for their children.

Figure 22: Other Barriers to Working in Manufacturing in Jefferson County



Methods

The Jefferson County Labor Basin has a total population of approximately 713,048 and a Civilian Labor Force of 400,895. The total number of employed is 386,460 and the average county unemployment rate was about 3.60% at the time of this study. The Docking Institute's analysis suggests that the Jefferson County Labor Basin contains an Available Labor Pool of 238,289 individuals.

Explaining the Civilian Labor Force

Traditional methods of assessing the dynamics of the labor force have concentrated on what the Bureau of Labor Statistics calls the Civilian Labor Force. The Civilian Labor Force represents "the civilian non-institutional population, 16 years of age and over classified as employed or unemployed." The BLS defines "non-institutional civilians" as those individuals who are not inmates in institutions and who are not on active duty in the Armed Forces; and "unemployed civilians" as civilians available for work and who had "made specific efforts to find employment" in the previous four weeks.

While a review of Civilian Labor Force statistics represents the starting point for understanding labor force dynamics in the Jefferson County Labor Basin, there are some limitations associated with these statistics. These limitations occur because the Civilian Labor Force *excludes* individuals who may be willing and able to be gainfully employed but have not made specific efforts to find employment in the last four weeks. These individuals may include full-time students, homemakers, unemployed who are no longer seeking employment, military personnel who may be leaving military employment in the near future, and retired individuals who may be available for work but have not been looking for work recently.

In addition, most new employers draw their workforce from those who are presently employed, not those who are unemployed. As such, Bureau of Labor Statistics data (such as the Civilian Labor Force) do not specifically address the possibility of workers moving from one industry to another in search of other employment opportunities.

Defining the Available Labor Pool

An alternative to the Civilian Labor Force is the "Available Labor Pool."⁸ The Available Labor Pool is composed of workers categorized as either 1) currently not working *and* looking for employment, 2) currently not working *but* interested in employment given the right opportunities, 3) currently working *and* looking for other employment, and 4) currently working and not looking, *but* interested in different employment for the right opportunities.

There are two key differences between the Civilian Labor Force and the Available Labor Pool. First, the Available Labor Pool methodology expands the pool of potential workers by including workers excluded from the Civilian Labor Force.⁹ Secondly, the number of potential workers is

⁸ The Available Labor Pool includes potential workers excluded from the Civilian Labor Force (such as full-time students willing to take a job, homemakers who have not yet sought employment, military personnel who may be leaving military employment in the near future, and retired individuals who may be willing and able to be gainfully employed).

⁹ The number that is added to the Civilian Labor Force is derived by taking from the survey the total number of full-time students, homemakers, military, retirees, and long-term unemployed, who state that they are seeking or available for employment, and dividing this number by the total number of respondents. This quotient is then multiplied by the total number of people in the labor basin who are 18 to 65 years old.

then *restricted* to those individuals who indicate that they are looking for work or are interested in new employment. The advantage of this methodology is that it allows researchers to examine those members of the labor pool who have a propensity to consider a job opportunity given their employment expectations. Even with these restrictions, it should be noted that, in practice, not all members of the Available Labor Pool would apply for a new job opportunity. However, the Available Labor Pool figure for a labor basin reveals to current employers and potential employers better information about the quantity and quality of the labor pool than do Civilian Labor Force data and unemployment statistics. The Available Labor Pool represents a substantial number of workers and potential workers for employers to draw upon in the Jefferson County Labor Basin.

Description of Survey Research Methods

Data for the study were collected from a random digit telephone survey of adults living in 10 counties in central Wisconsin: Columbia, Dane, Dodge, Fond du Lac, Green Lake, Jefferson, Rock, Walworth, Washington, and Waukesha. Portion of some counties were excluded because they contain large population centers, potentially capturing numerous potential workers.

Surveying took place from October 2017 to February 2018, using a Computer Assisted Telephone Interviewing (CATI) system.¹⁰ In 2,099 households a randomly selected adult agreed to be interviewed.

Survey respondents that were 65 years of age or older, retired and not looking for work nor interested in a new or different job were not asked the entire battery of survey questions and are not included in the analysis of this report. The remaining respondents (all other working and non-working respondents) total to 1,530 and are considered eligible respondents. Of these respondents, 788 or (51.5%) are looking for work or are interested in new or different employment. This subgroup is the Available Labor Pool for the study region. The Margin of Error for the region-wide Available Labor Pool is +/- 3.49%.

The Jefferson County Labor Basin encompasses eight of the 10 counties: Columbia, Dane, Dodge, Jefferson, Rock, Walworth, Washington, and Waukesha. A total of 1,376 cooperating and eligible respondents lie within the basin. Of these respondents, 724 constitute 2018 Available Labor Pool for the Jefferson County Labor Basin (Margin of Error = +/- 3.64%).

The study sponsors and Institute personnel agreed upon the survey items used, with the former identifying the study objectives and the latter developing items and methodologies that were valid, reliable and unbiased. Question wording and design of the survey instrument are the property of the Docking Institute.¹¹

¹⁰ When a land-line number was called, surveyors requested to “speak with an adult over the age of 17 that has had the most recent birthday.” When a cell-phone number was called, the respondent was asked if they were over the age of 17.

¹¹ A detailed summary of the method of analysis used in this report can be found in Joseph A. Aistrup, Michael S. Walker & Brett A. Zollinger, “The Kansas Labor Force Survey: The Available Labor Pool and Underemployment.” *Kansas Department of Human Resources*, 2002.

Glossary of Terms

Jefferson County Labor Basin – The Jefferson County Labor Basin includes all or portions of Columbia, Dane, Dodge, Jefferson, Rock, Walworth, Washington, and Waukesha counties in central Wisconsin.

Civilian Labor Force – The Civilian Labor Force represents “the civilian non-institutional population, 16 years of age and over classified as employed or unemployed.” The Bureau of Labor Statistics defines “non-institutional civilians” as those individuals who are not inmates in institutions and who are not on active duty in the Armed Forces; and “unemployed civilians” as civilians available for work and who had “made specific efforts to find employment” in the previous four weeks.

Available Labor Pool – The Available Labor Pool is composed of workers and potential workers categorized as either 1) currently not working *and* looking for employment, 2) currently not working in any manner *but* interested in a new or different job given the right opportunities, 3) employed (full- or part-time) *and* looking for other employment, and 4) currently employed and not looking, *but* interested in different employment given the right opportunities.

Non-Employed – A respondent who indicated he or she is not employed. Non-working respondents include full-time students, homemakers, retired, officially unemployed, or disabled.

Desired Wage – The desired wage is the hourly wage that a respondent would consider accepting to take a new or different job given the right opportunities. If a respondent offers a yearly salary instead of an hourly wage, a wage is computed by dividing the salary by 2,080.

Minutes Willing to Commute – The number of minutes a respondent is willing to commute, one way, for a new or different job opportunity.

Within the Necessary Commute Time – “Necessary Commute Time” is the number of minutes that a respondent is willing to travel that is equal to or greater than the estimated travel time necessary for the respondent to actually commute from his or her ZIP code of residence to the ZIP code at the center of the labor basin. For example, a respondent who is willing to travel for 30 minutes, one-way, for a new or different job and that lives an estimated 15 minutes from the center of the labor basin is considered to be “within the necessary commute time” for a new job.

Willing to Work in Manufacturing – Respondents indicating they are interested in a job in a manufacturing field.

Willing to Work in Jefferson County – Respondents reporting that they are willing to working in a manufacturing job in Jefferson County.

Job Sectors – “Job sectors” include the following (with examples shown):

- **General Labor** includes occupations such as cleaning, construction, delivery, and maintenance.
- **Highly Skilled Blue Collar** includes occupations such as police, fire-fighting, postal worker, welder, highly skilled mechanic, computer technician, and lab technician.
- **Service Sector** includes occupations such as clerical worker, waitress, retail sales clerk, bookkeeper, para-professional, certified nurse’s assistant, nurse, teacher and small business manager.
- **Professional White Collar** includes occupations such as administrator, business executive, professional salesperson, doctor, lawyer, professor, and engineer.

Appendix: Hourly Wage to Annual Salary Conversion Chart

Hourly Wage	Annual Salary	Hourly Wage	Annual Salary
\$5.00	\$10,400	\$30.50	\$63,440
\$5.50	\$11,440	\$31.00	\$64,480
\$6.00	\$12,480	\$30.50	\$63,440
\$6.50	\$13,520	\$31.00	\$64,480
\$7.00	\$14,560	\$31.50	\$65,520
\$7.50	\$15,600	\$32.00	\$66,560
\$8.00	\$16,640	\$32.50	\$67,600
\$8.50	\$17,680	\$33.00	\$68,640
\$9.00	\$18,720	\$33.50	\$69,680
\$9.50	\$19,760	\$34.00	\$70,720
\$10.00	\$20,800	\$34.50	\$71,760
\$10.50	\$21,840	\$35.00	\$72,800
\$11.00	\$22,880	\$35.50	\$73,840
\$11.50	\$23,920	\$36.00	\$74,880
\$12.00	\$24,960	\$36.50	\$75,920
\$12.50	\$26,000	\$37.00	\$76,960
\$13.00	\$27,040	\$37.50	\$78,000
\$13.50	\$28,080	\$38.00	\$79,040
\$14.00	\$29,120	\$38.50	\$80,080
\$14.50	\$30,160	\$39.00	\$81,120
\$15.00	\$31,200	\$39.50	\$82,160
\$15.50	\$32,240	\$40.00	\$83,200
\$16.00	\$33,280	\$40.50	\$84,240
\$16.50	\$34,320	\$41.00	\$85,280
\$17.00	\$35,360	\$41.50	\$86,320
\$17.50	\$36,400	\$42.00	\$87,360
\$18.00	\$37,440	\$42.50	\$88,400
\$18.50	\$38,480	\$43.00	\$89,440
\$19.00	\$39,520	\$43.50	\$90,480
\$19.50	\$40,560	\$44.00	\$91,520
\$20.00	\$41,600	\$44.50	\$92,560
\$20.50	\$42,640	\$45.00	\$93,600
\$21.00	\$43,680	\$45.50	\$94,640
\$21.50	\$44,720	\$46.00	\$95,680
\$22.00	\$45,760	\$46.50	\$96,720
\$22.50	\$46,800	\$47.00	\$97,760
\$23.00	\$47,840	\$47.50	\$98,800
\$23.50	\$48,880	\$48.00	\$99,840
\$24.00	\$49,920	\$48.50	\$100,880
\$24.50	\$50,960	\$49.00	\$101,920
\$25.00	\$52,000	\$49.50	\$102,960
\$25.50	\$53,040	\$50.50	\$104,000
\$26.00	\$54,080	\$51.00	\$105,040
\$26.50	\$55,120	\$51.50	\$106,080
\$27.00	\$56,160	\$52.00	\$107,120
\$27.50	\$57,200	\$52.50	\$108,160
\$28.00	\$58,240	\$53.00	\$109,200
\$28.50	\$59,280	\$53.50	\$110,240
\$29.00	\$60,320	\$54.00	\$111,280
\$29.50	\$61,360	\$54.50	\$112,320
\$30.00	\$62,400	\$55.00	\$113,360

End of Report

