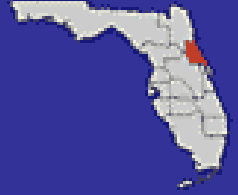


# Executive Summary



## *Flagler & Volusia Counties*



## *Job Market Survey and Web Application Suite*



Conducted by:

*The ERISS Corporation*



## Table of Contents

Introduction _____	3
Overview of the Florida High Tech Corridor _____	3
Scope of Project _____	4
Overall Florida High Tech Corridor _____	4
The Flagler & Volusia Survey Project _____	4
The USWorks Application Suite _____	5
USWorks for Professionals™ _____	5
USWorks for Jobseekers™ _____	6
USWorks for Employers™ _____	7
Industry Growth, Turnover & Demand _____	8
Projected Relative Growth for the Flagler & Volusia Region _____	8
Annual Turnover Rate for the Flagler & Volusia Region _____	9
Projected Demand for the Flagler & Volusia Region _____	10
Supplemental Questions _____	11
Provision of Internships _____	11
Non-Regional Recruitment _____	12
Effects of September 11th _____	13
Short Term Plans (Company-level) _____	14
Use of One-Stop Center Services _____	15
Most Commonly Used One-Stop Center Services _____	16
Services Critical to Company Growth _____	17



## Introduction

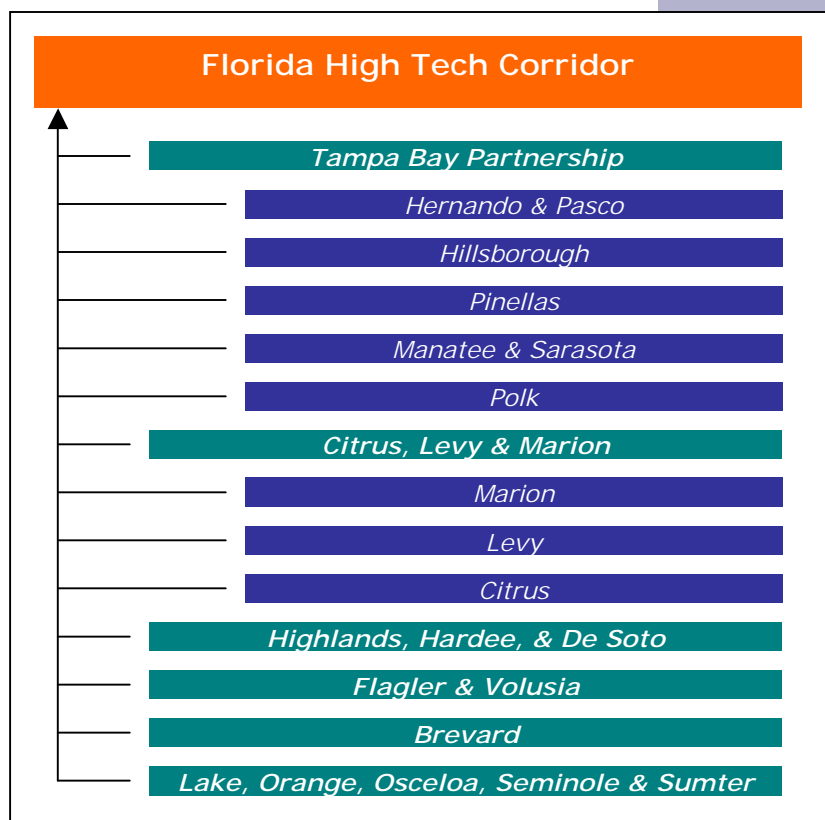
The Flagler & Volusia survey was conducted during the period of November 2001 through January, 2002 as part of a comprehensive project encompassing the Florida High Tech Corridor. The objectives of this project were to collect occupation and employer specific data concerning wages, demand, supply difficulty, and a number of other workforce-related issues. The survey results have been published through a suite of interactive web applications.

## Overview of the Florida High Tech Corridor

In its entirety, the Florida High Tech Corridor region spans 21 counties. This resulted in a target employer population (those with 10 or more employees) of over 48,000 employers.

**Figure 1: Counties included in the Florida High Tech Corridor**

Figure 1 displays the Counties included in the Florida High Tech Corridor project as well as the different ways in which the survey data can be accessed through the interactive web application. For instance, survey results for the County of Pinellas can be accessed individually, or through the Tampa Bay Partnership aggregate, which would display data for all of the Partnership counties combined. Likewise, survey results for the Counties of Citrus, Levy, and Marion can be accessed individually, or as an aggregate of all three. As represented by the orange bar, all combined survey results can be accessed through an aggregate representing the entire Florida High Tech Corridor.



## Scope of Project

### Overall Florida High Tech Corridor

The survey statistics for the comprehensive Florida High Tech Corridor project are displayed in Table 1. Overall, ERISS attempted to contact a total of 48,142 employers. In doing so, over 104,000 phone calls were placed using the ERISS Computer Aided Telephone Interviewing system. Of these employers, 10,229 were classified as 'outside scope'<sup>1</sup> leaving a net employer base of 37,913. A total of 11,601 of these employers responded to the survey resulting in a 30.6% response rate. A methodology that drives the sampling and occupational selection process to collect data in proportion to the employer size, industry, and geographic area of the respondent was used in order to obtain a representative sample.

### Flagler & Volusia Survey Project

In total, ERISS attempted to contact 2,864 employers with 10 or more employees on behalf of the Workforce Development Board of Flagler and Volusia Counties. Of those employers, 643 were designated as 'outside scope'<sup>1</sup> leaving a total employer base of 2,221. A total of 738 of these employers responded to the survey, resulting in a 33.2% response rate.

Table 1. Overall and Regional Survey Statistics

	<b>FHTCC</b>	<b>Flagler &amp; Volusia</b>
<i>Attempted Contact:</i>	48,142	2,864
<i>Outside Scope:</i>	10,229	643
<i>Net Employer Base:</i>	37,913	2,221
<i>In-Scope Employers Responding:</i>	11,601	738
<i>% Response:</i>	30.60%	33.23%

<sup>1</sup> Employers with wrong numbers and no new numbers, no answer on repeated attempts, employers with less than 10 employees, or employers with no relevant occupations due to incorrect industry code assignment.

## The USWorks Application Suite

The results have been disseminated on a suite of dynamic Web Applications designed to meet the needs of three specific types of users: (1) Workforce Professionals (2) Employers, and (3) Jobseekers. This dissemination method enables all users throughout the region to easily access the data; no paper report or software is needed. These applications (described in more detail below) may be accessed via the Internet at: <http://www.usworks.com/FloridaHighTech>.

### USWorks for Professionals™

The award-winning USWorks for Professionals is a powerful tool for displaying and interacting with the information collected through ERISS's job market surveys. The new USWorks for Professionals has been designed from the ground up to serve workforce professionals from front line one-stop staff to planners, educators and economic development professionals.

#### USWorks for Professionals Includes:

- "Top 20 Hit Lists" that allows users to dynamically create lists of occupations meeting certain labor market requirements like growth, education, turnover, demand and salary.
- Detail look-up information on local resources such as training, staffing agencies, childcare providers, transportation and more.
- Ability to view data by industry, by region and now also by employer size.
- Integrated and fully cross-walked data sets including the Occupational Outlook Handbook (OOH), occupational videos, ACT's WorkKeys® skills, O\*NET skills and tasks, local training programs, relevant occupational web sites, military occupations and 60,000 lay titles cross-walked to the O\*NET coding system.
- The ability to save named lists of occupations that can quickly be retrieved for specific purposes.



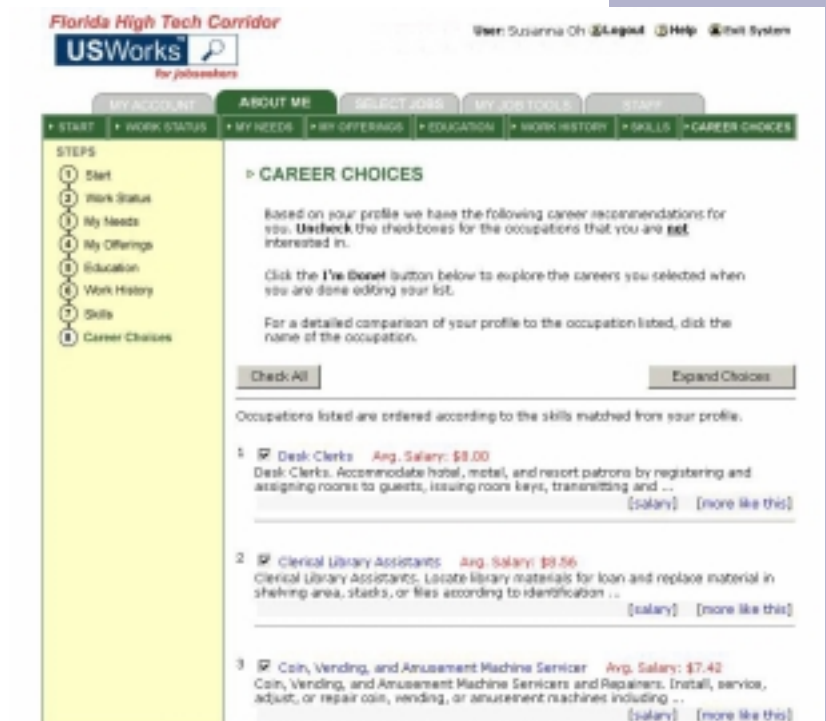
For example, counselors can now create their own lists of target occupations for specific client groups, thus saving time and effort. Economic Development professionals can save occupational lists associated with specific target industries for easier research.

## USWorks for Jobseekers™

USWorks for Jobseekers is designed to provide an entirely new class of Internet-based, self-service system. Jobseeker services include matching jobseeker skills to job opening requirements, online job listings with job descriptions, and online application and résumé submittal.

### Specific Capabilities of USWorks for Jobseekers:

- Performs skills transference and recommends best opportunities locally, based upon the jobseeker's specific needs, preferences, skills and background compared to general and specific demand in the local market place as indicated in the survey data.
- "Packages" the jobseeker by generating relevant résumés and applications for work (integrated with verified ACT WorkKeys® scores when available). With a single click, jobseekers can auto-post their résumés to numerous job boards including existing public systems.
- Promotes the jobseeker to matched employers that are known to be in need.
- Integrates with ACT WorkKeys test scores to further guide the client and better "package" the individual to employers.
- Provides "one-click" display of relevant job postings from a host of job boards.
- Provides the jobseeker with current, relevant and local decision support information for anything from career change decisions to specific job offerings.
- Provides jobseekers with local, detailed job support information on everything from child care providers and public transportation information to relevant, local training providers, and temp agencies.



## USWorks for Employers™

USWorks for Employers is the complementing Web Application to USWorks for Jobseekers.

This service provides each surveyed employer with a customized Web site and a communication connection to relay relevant local job market information and place orders for qualified candidates in real time. Additionally, it includes critical retention and hiring decision tools and information, all relating directly to each employer's specific needs.

The screenshot displays the 'Main Page - Staff Selection' interface. At the top, it says 'Brought to you by Florida High Tech Corridor Council'. The main content area is titled 'My Staff' and includes the text: 'This list represents your "Active" staff positions.' Below this is a table with the following columns: 'Active Positions', 'Applicant Magnet', 'Market Data', 'Tools', and 'Delete'. The table lists various occupations such as 'General and Operations Managers', 'Human Resources Managers', 'Industrial Production Managers', etc. To the right of the table, there are icons and text explaining the 'Applicant Magnet' (Attract candidates), 'Market Data' (Current salary and job market data), and 'Tools & Resources' (Remove the title from your active list) features. A sidebar on the left contains navigation options like 'Login', 'Staff Selection', 'Tools & Resources', 'Market Data', 'Applicant Magnet', 'My Company News', and 'Sponsors'. A right sidebar contains a link to 'General Management General Support Information Technology'.

For each listed occupation, employers will have one-click access to occupational specific information on:

- Critical local hiring and retention decision information
- Access to local résumés from both the USWorks Jobseeker application and from America's Job Bank.
- Current salary information updated every 3-4 weeks.
- The one-click "applicant magnet." When activated for an occupation, résumés and information regarding qualified links and applicants are automatically made available.

## SUMMARY OF KEY SURVEY DATA

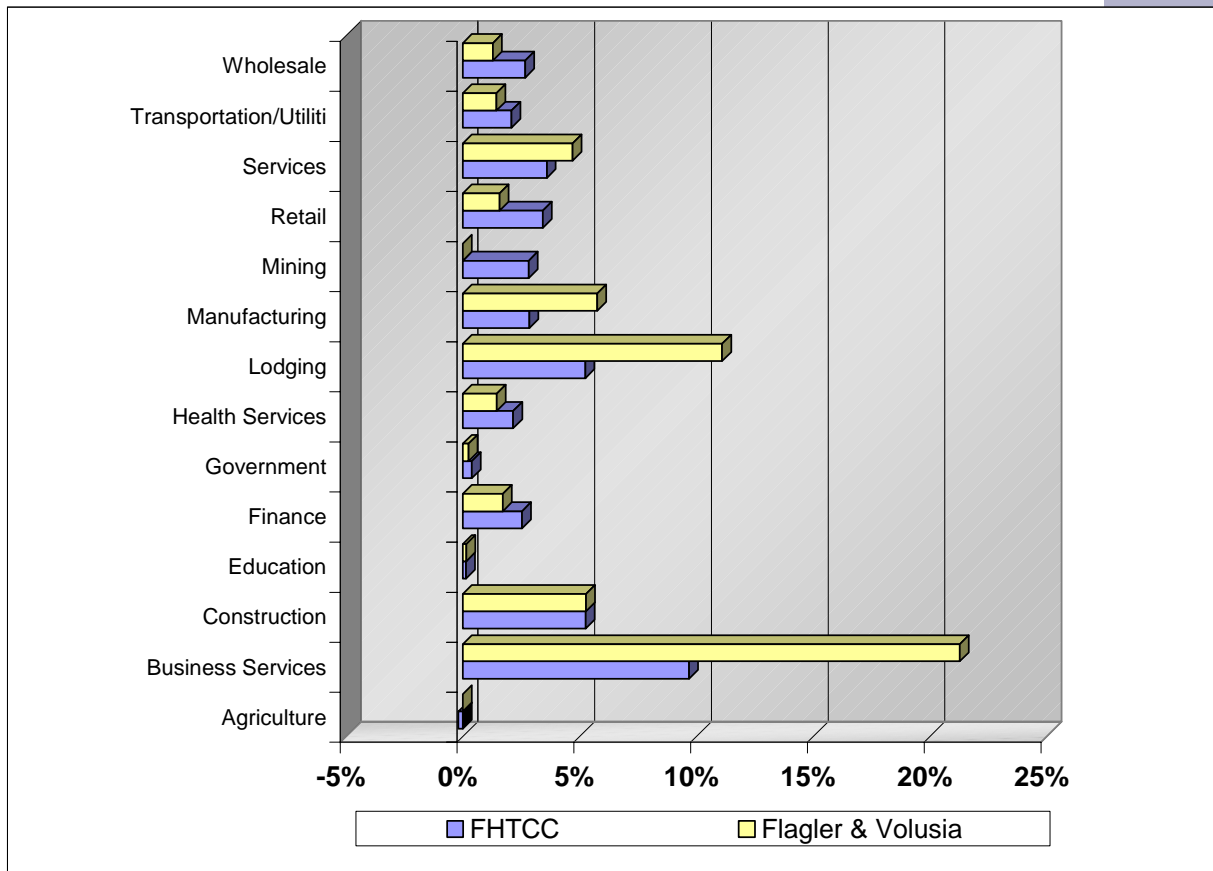
The goal of the following analyses is to briefly describe the Flagler & Volusia Region job-market in terms of such factors as projected demand, projected growth and employer-reported turnover at the industry level.

### Growth, Turnover and Demand

#### Projected Relative Growth for the Flagler & Volusia Region

Employers were asked to report the number of employees at their company now, and to project how many employees they would have at this time next year. From this information, projected relative growth was calculated. As shown in Figure 2, the industry with the highest projected relative growth for the next year for the Flagler & Volusia region is *Business Services* (21%). The *Lodging* industry also had a relatively high projected relative growth for the next year (11%).

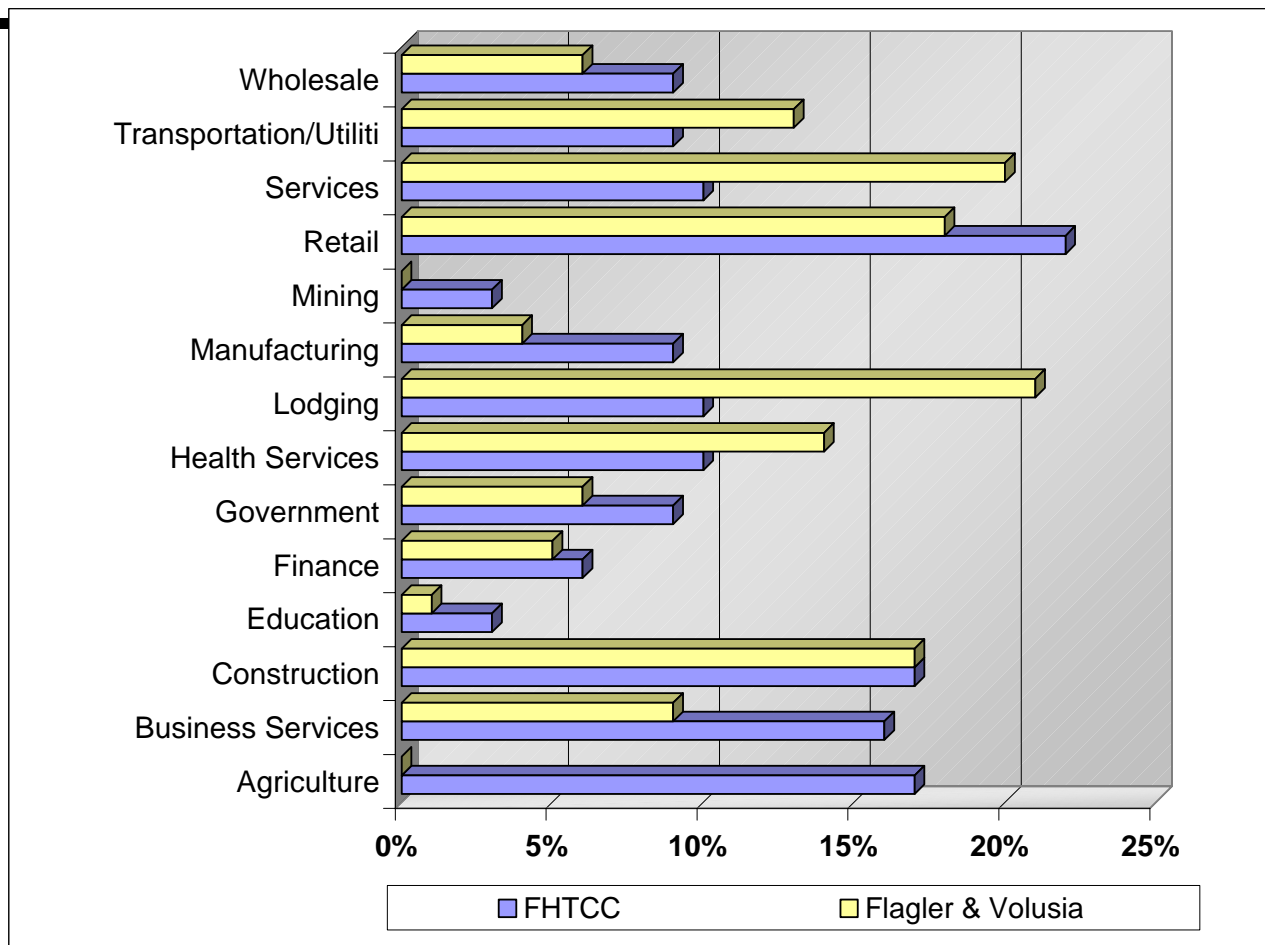
**Figure 2: Projected Relative Growth**



## Annual Turnover Rate for the Flagler & Volusia Region

For each occupation surveyed, employers were asked to report an annual turnover rate. Industry level turnover rates were calculated from the aggregate of the occupational turnover for the respective industry. As shown in Figure 3, for the Flagler & Volusia region, the industries with the highest reported level of annual turnover were *Lodging* (21%) and *Services* (20%). Other high-turnover industries were *Retail* (18%), *Construction* (17%), and *Health Services* (14%). For the latter industries, the high turnover rate was consistent with that found for those same industries in the overall Florida High Tech Corridor regions.

**Figure 3: Annual Turnover Rate**

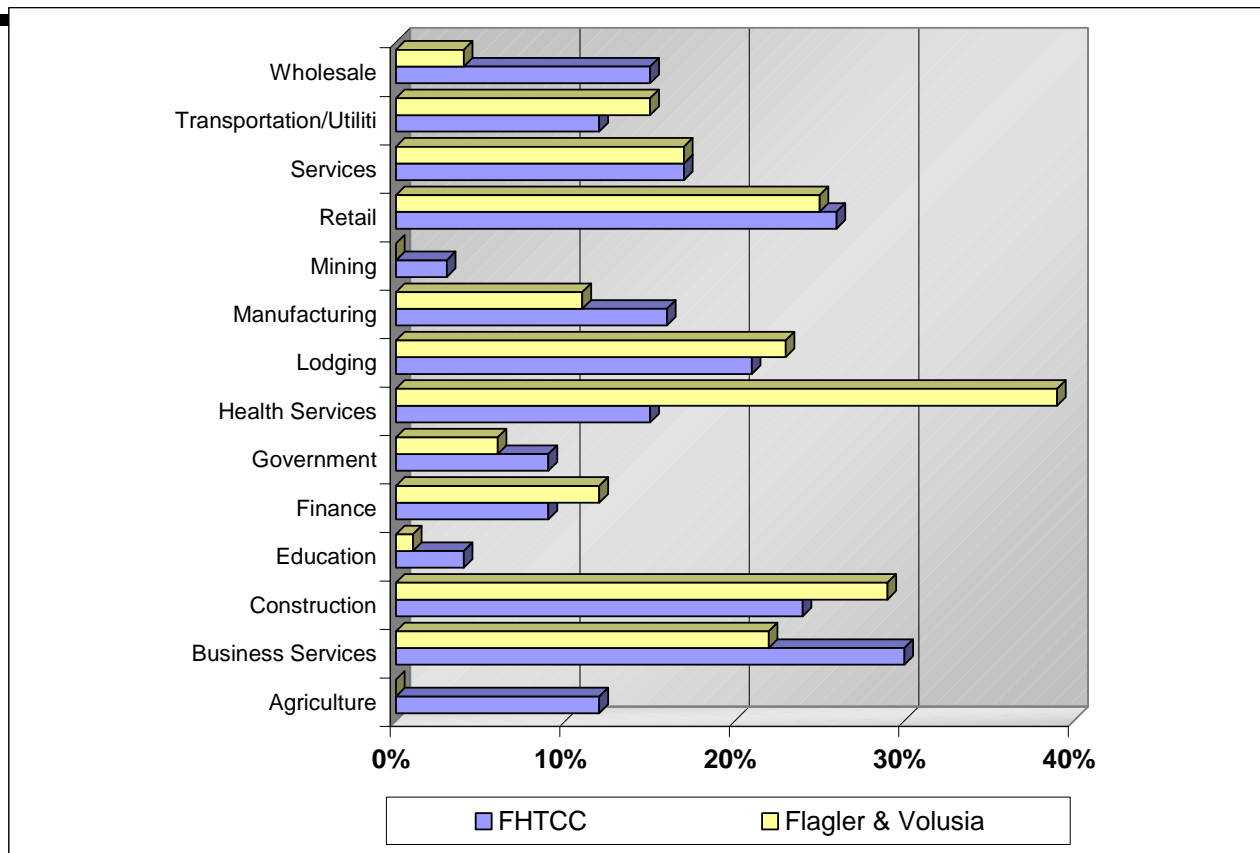


## Projected Demand for the Flagler & Volusia Region

Level of demand for an industry is primarily influenced by two factors: (1) the creation of new positions (i.e., growth), and (2) employees cycling through existing positions (i.e., turnover). Therefore, in terms of labor market statistics, *Demand* is a function of projected relative *Growth* plus annual *Turnover*. For instance, an industry with high turnover, but minimal growth will still exhibit high demand for employees. Therefore, it is best to consider these three factors concurrently when interpreting demand information (especially with regards to the implementation of training programs and/or the allocation of funding).

As shown in Figure 4, the *Health Services* (39%), *Construction* (29%) and *Retail* (25%) industries have the highest projected relative demand for the Flagler & Volusia region. Examination of Figure 3 (previous page) reveals that this demand is largely driven by turnover within these industries.

**Figure 4: Projected Demand**

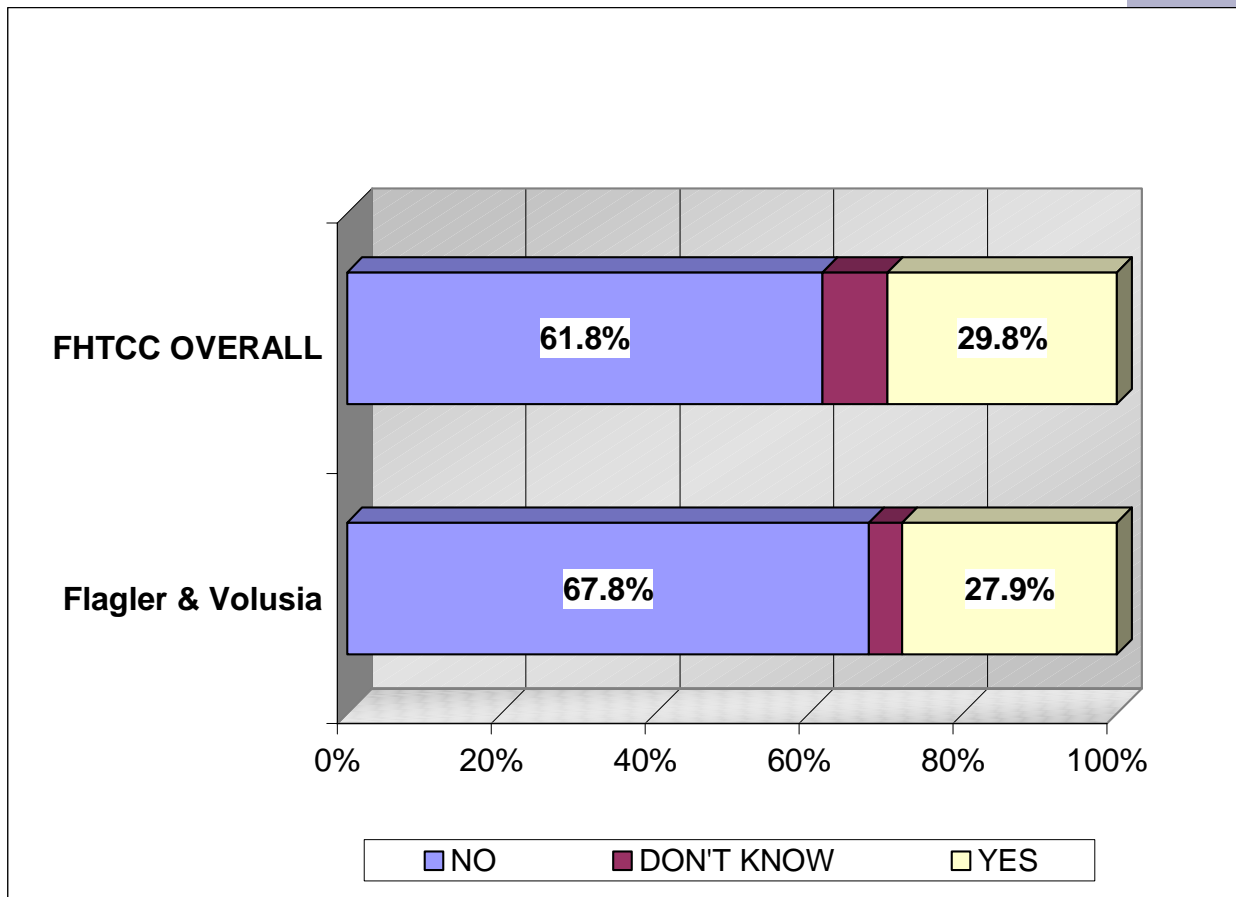


## Supplemental Questions

### Provision of Internships

Employers were asked to report if they provided internships to post-secondary (i.e., college) students. As shown in Figure 5, almost 68% of employers in the Flagler & Volusia region reported they do not provide such internships. This compares with about 62% for as reported for all surveyed employers in the Florida High Tech Corridor.

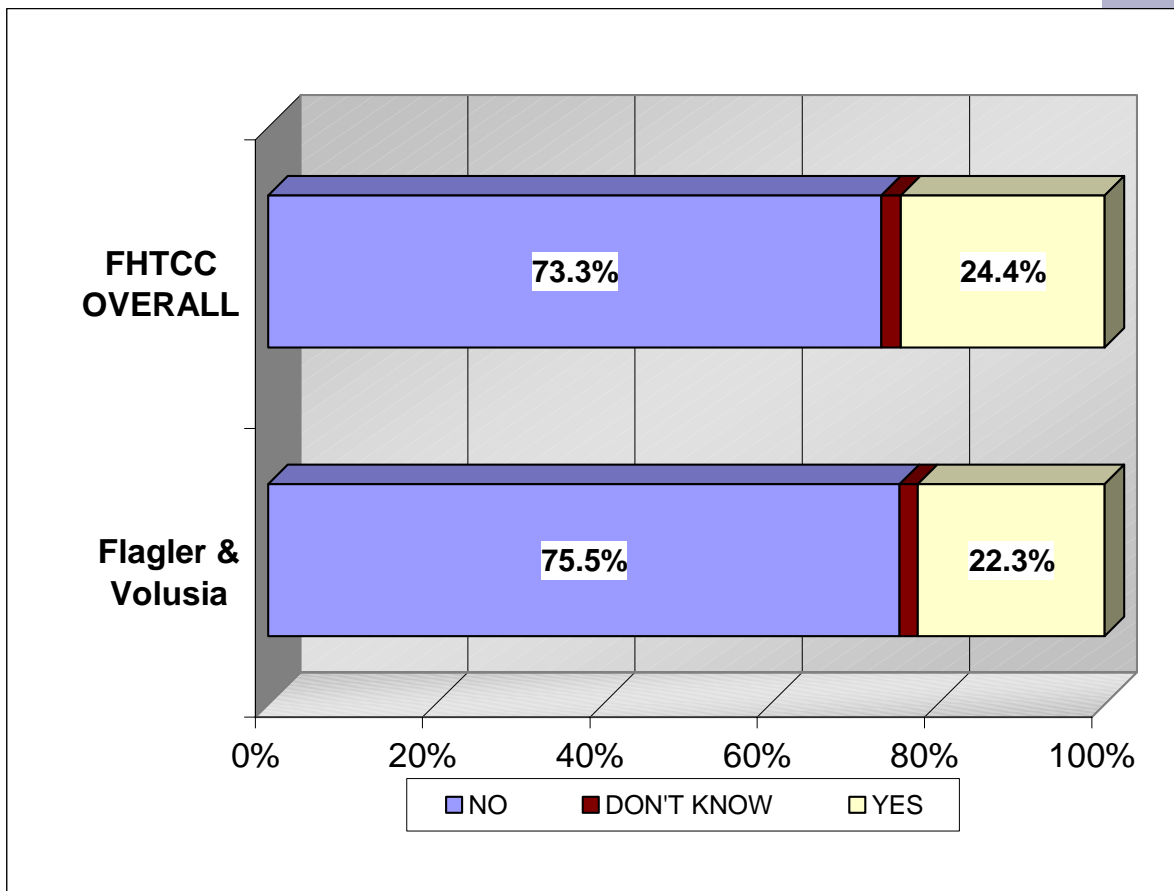
**Figure 5: DO YOU PROVIDE INTERSHIPS TO POST-SECONDARY (COLLEGE) STUDENTS?**



## Non-Regional Recruitment

Employers were asked if they recruited for new employees outside of their region. As shown in Figure 6, about 75% of surveyed employers in the Flagler & Volusia region reported not doing so. This rate is similar to that found for the overall Florida High Tech Corridor.

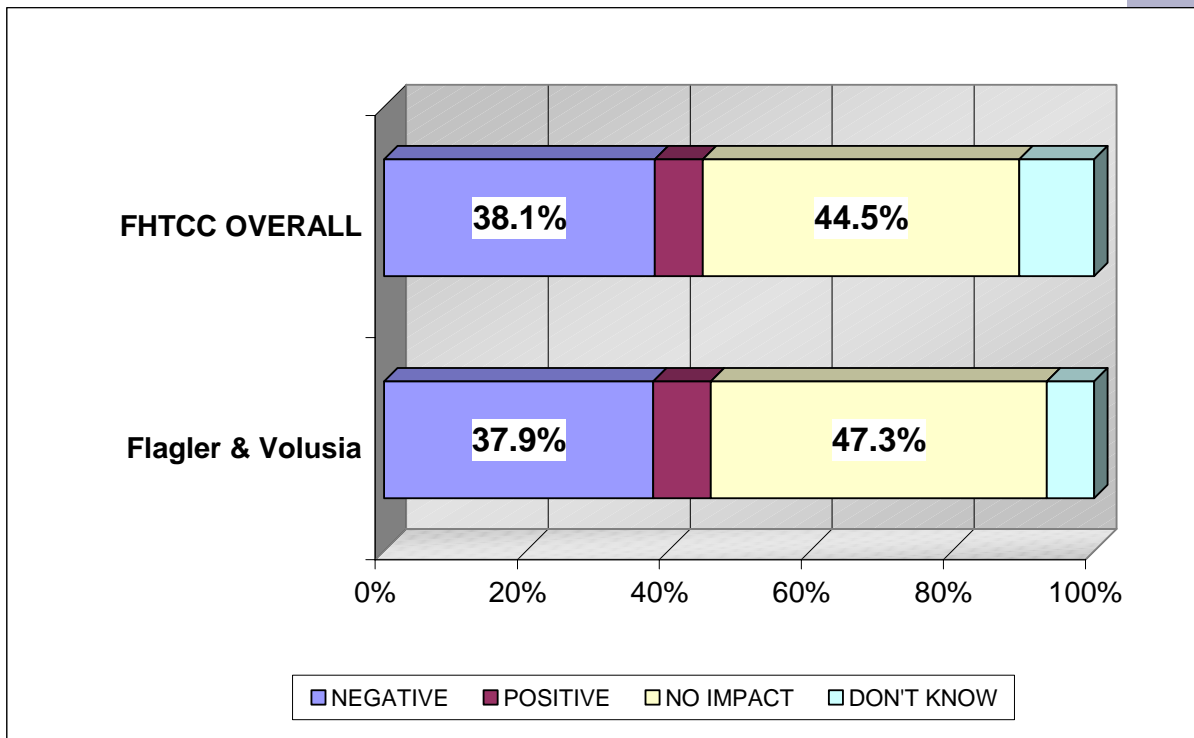
**Figure 6: ARE YOU RECRUITING OUTSIDE OF YOUR REGION TO HIRE EMPLOYEES?**



## Effects of September 11th

Employers were asked to report how the events of September 11<sup>th</sup> might impact their year-end revenues. As shown in Figure 7, about 38% of employers surveyed reported the events would have a negative impact (about the same as reported for the entire Florida High Tech Corridor). Additionally, similar proportions of employers in the Flagler & Volusia region (as compared with the Florida High Tech Corridor overall) reported the events of September 11<sup>th</sup> would have no impact on their year-end revenues (47.3% and 44.5% respectively).

**Figure 7: DUE TO THE EVENTS OF September 11<sup>TH</sup> WHAT WOULD YOU SAY THE IMPACT WILL BE ON YOUR YEAR-END REVENUES?**

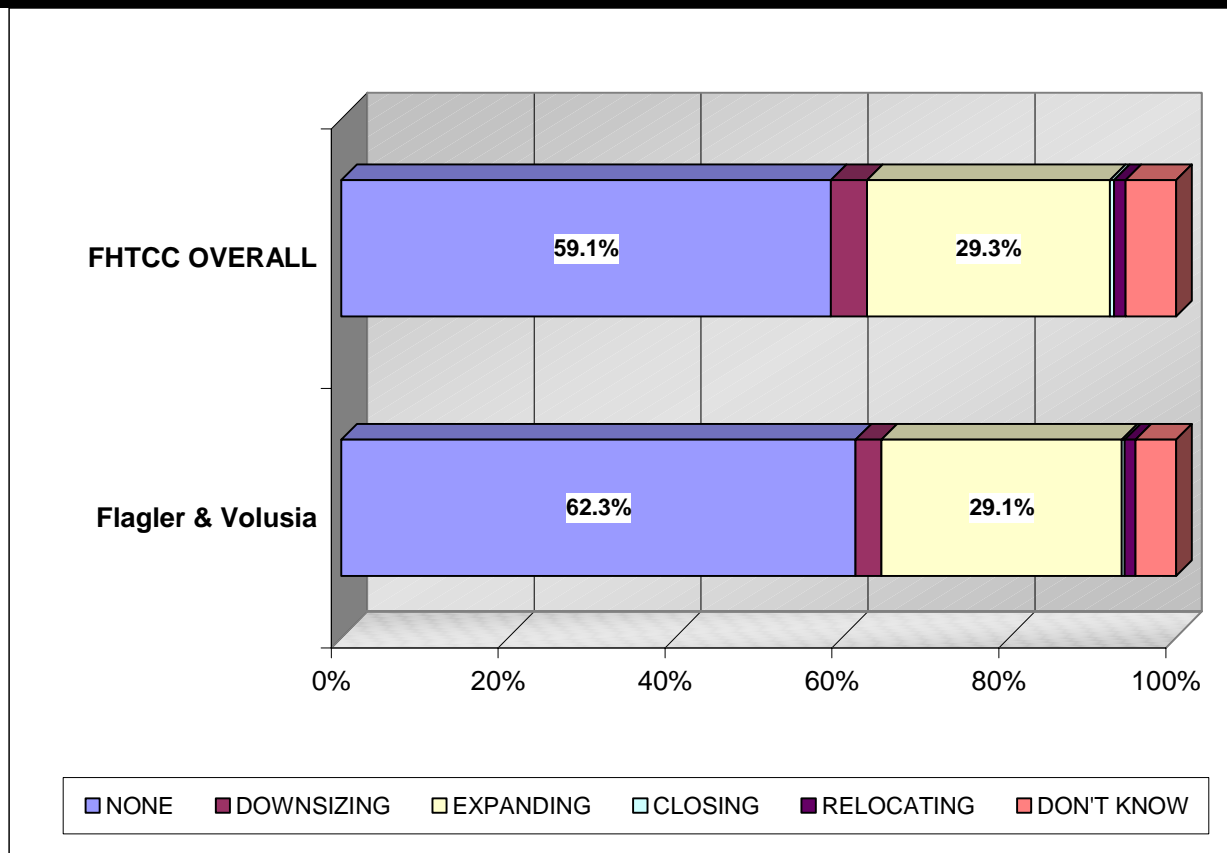


### Short Term Plans (Company-level)

Employers were asked to report if they planned to do any of the following within the next 6-months: (1) Downsize, (2) Expand, (3) Relocate, and (4) Close. They were given the additional option of choosing 'none' or 'don't know.'

As shown in Figure 8, about 62% of surveyed employers in the Flagler & Volusia region reported they did not anticipate any of these actions (as compared with 59% for the Florida High Tech Corridor). About 29% of employers in both the Flagler & Volusia and overall Florida High Tech Corridor regions reported plans to expand the company within the next 6 months.

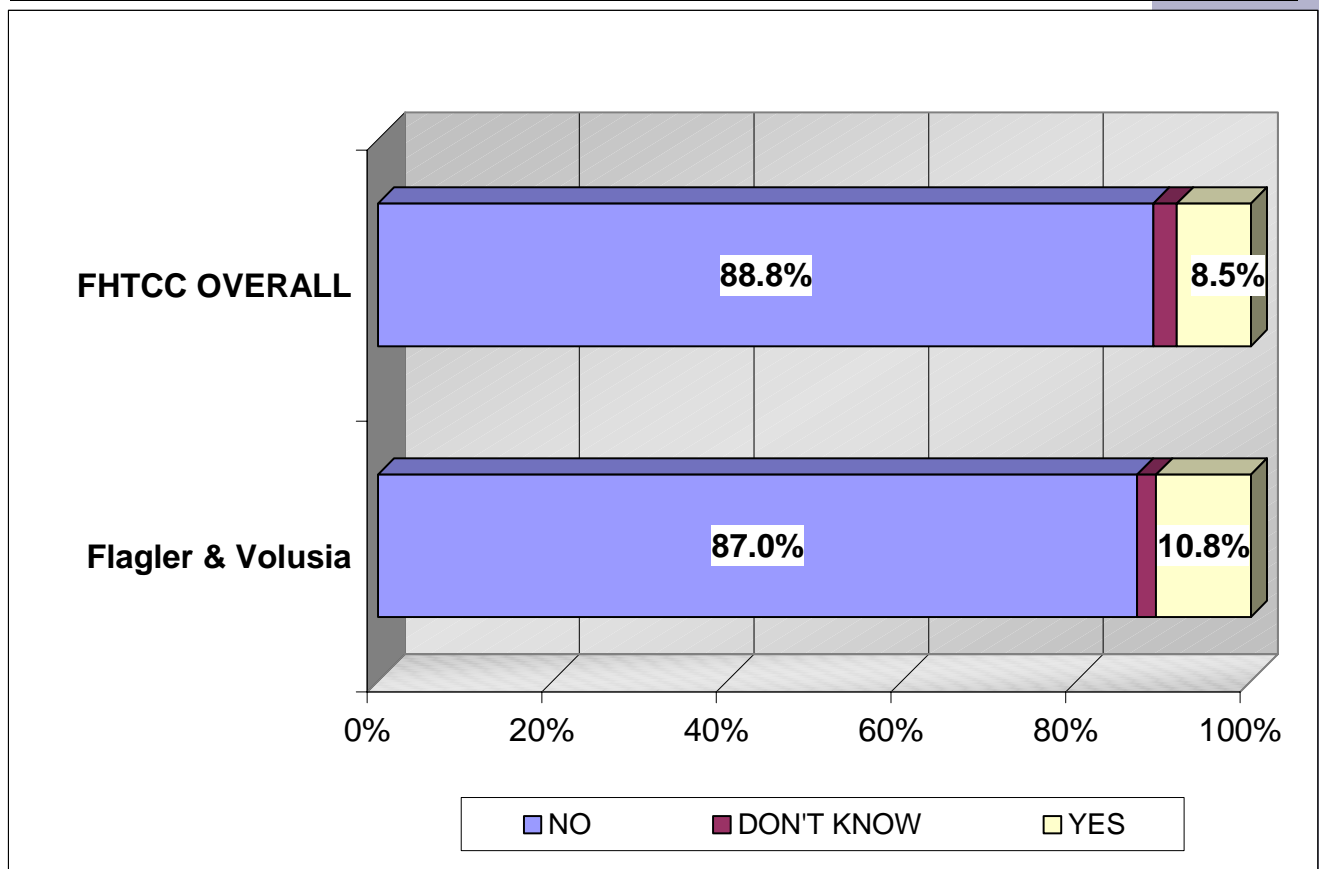
**Figure 8: WITHIN THE NEXT 6 MONTHS, DOES YOUR COMPANY ANTICIPATE...**



## Use of One-Stop Center Services

Employers were asked to report if they had used any One-Stop Center services within the past 12 months. As shown in Figure 9, about 87% of surveyed employers in Flagler & Volusia region reported they did not utilize any One-Stop Center services.

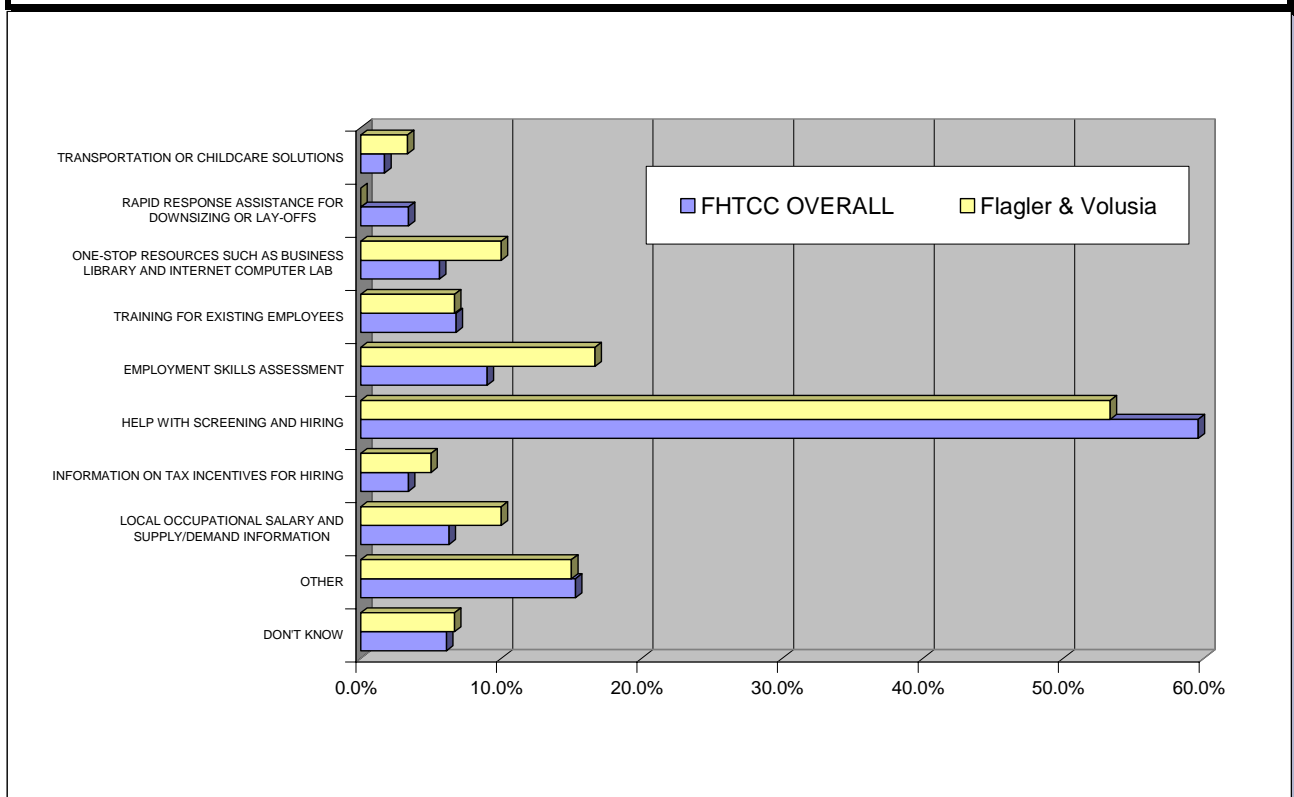
**Figure 9: HAVE YOU USED ANY ONE-STOP CENTER SERVICES IN THE PAST 12 MONTHS?**



## Most Commonly Used One-Stop Center Services

Employers that indicated they had used One-Stop Center services within the last 12 months were asked to indicate which services they had used. As shown in Figure 10, by far the most commonly used service for employers in the Flagler & Volusia region and the overall Florida High Tech Corridor was 'Help with Screening and Hiring' (53% and 60% respectively). Other commonly used services for the Flagler & Volusia region included 'Employment Skills Assessment' (17%) and 'One-Stop Resources such as Business Library and Computer/Internet Lab' (10%). These latter two services seemed especially relevant to the local area as compared with the overall Florida High Tech Corridor.

**Figure 10: WHICH ONE-STOP CENTER SERVICES HAVE YOU USED?**



## Services Critical to Company Growth

Employers were asked to report which services would be most critical to helping their company grow within the next year. As shown in Figure 11, the most critical service to aid growth was reported to be 'Training for Existing Employees' for employers in both the Flagler & Volusia region and the overall Florida High Tech Corridor (27% and 28% respectively). Also reported as critical to growth for employers in the Flagler & Volusia region were: 'Local Occupational Salary and/or Supply and Demand Information' (17%), 'Help with Screening and Hiring' (16%), 'Employment Skills Assessment' (16%), and 'Information on Tax Incentives for Hiring' (9%).

**Figure 11: WHICH OF THE FOLLOWING SERVICES WOULD BE MOST CRITICAL TO HELPING YOUR COMPANY GROW OVER THE NEXT YEAR?**

