

CareerSource Citrus Levy Marion's Strategic Plan for the Workforce Innovation and Opportunity Act and Beyond

2015





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A Strategic Plan for the Workforce Innovation and Opportunity Act and Beyond

In July 2014, Congress passed the Workforce Innovation and Opportunity Act (WIOA) to replace the Workforce Investment Act of 1998. Taking effect on July 1, 2015, WIOA provides an opportunity for local workforce development boards to review their current practices in light of the evolving workforce and economic dynamics within their communities. It provides an opportunity to transform the way the workforce system is doing business and realize a new vision for talent development built around the notion of a demand-driven system that leverages resources and partnerships to provide an inclusive talent pool.

CareerSource Citrus Levy Marion (CLM) is leading the charge among its peers in Florida and throughout the country with the development of its Strategic Plan in light of the new Act. In February 2015, the CareerSource Citrus Levy Marion (CLM) Workforce Development Board engaged Thomas P. Miller and Associates to facilitate the creation of a strategic plan and assist with preparation for the implementation of the Workforce Innovation and Opportunity Act (WIOA). The Board's goal was to review and refine its current policies and strategies in light of the vision of WIOA and the opportunities that the law presents.

Planning for WIOA

The Workforce Innovation and Opportunity Act establishes an integrated, job-driven public workforce system that links diverse talent to businesses and adopts a broad perspective for talent development by linking with economic development, educational institutions, and other community-based organizations for comprehensive planning, collaboration, and service delivery.

In defining the role of local Workforce Development Boards, WIOA also outlines the following thirteen functions of a local board:

- Local Plan
- Workforce Research and Regional Labor Market Analysis
- Convening, Brokering, and Leveraging
- Employer Engagement
- Career Pathways Development
- Proven and Promising Practices
- Technology
- Program Oversight
- Negotiation of Local Performance Accountability Measures
- Selection of One-Stop Operators
- Coordination with Education Providers
- Budget and Administration
- Accessibility for Individuals with Disabilities

To frame the strategic discussions, the Board and CareerSource staff reviewed their current strengths and opportunities in light of these thirteen functions, and discussed priorities for the strategic plan.



Input for the strategic plan was also gathered through interviews with board members and partner organizations, as well as a comprehensive data analysis to understand the dynamics of the local workforce, economy, and targeted industries.

The strategic plan presented on the following pages was developed based on the information gathered throughout the planning process and refined during a Strategic Planning Retreat with board members. The plan sets a framework for the Board's work over the next three to five years.

The Strategic Plan: A Living Document

The strategic plan developed by the CareerSource CLM Board is a living document that will be used to guide the work of the Board and its staff. Organized around five goals and corresponding strategies, the strategic plan provides an ambitious, yet realistic “compass” to guide the Board's, staff's, and system's work over the next three to five years.

While the Board should be relentless in its push toward accomplishing these goals, it is also important to make adjustments to the plan when necessary. As the market for talent evolves or other factors impact progress, the strategic plan should be adapted as necessary. It is critical, then, to monitor progress routinely at multiple levels of implementation.

In implementing the strategic plan, the Board members, staff, and partners have unique roles and responsibilities to maintain.

Role of the Board

The CareerSource Citrus Levy Marion Board is ultimately responsible for the success of its strategic plan. With that said, the Board should provide oversight and direction for plan at a strategic level, rather than getting “in the weeds” of implementation. The Board is responsible for monitoring progress toward the goals and metrics identified in the plan.

Role of staff

CareerSource CLM will be responsible for managing the implementation and success of strategies laid out for each goal. They will provide the day-to-day operational support and services that build toward the goals of the plan. Staff will be responsible for tracking progress and reporting this progress to the Board.

Role of partners

Partners from throughout the community will play a key role in the success of the plan. Many of the goals and strategies require collaboration among partners. In some cases, partners will be looked upon to lead strategies and initiatives that further the plan.



MISSION AND VISION

Mission

CareerSource Citrus Levy Marion brings together citizens, employers and educational providers to develop programs to support high-quality education/training and employment services to meet regional workforce needs.

Vision

To be recognized as the number one workforce resource in the state of Florida by providing meaningful and professional customer service that is reflected in the quality of our job candidates and employer services.

GOALS AND STRATEGIES

Conversations with the Board, its staff, and community partners revealed several overarching themes for focus areas of the Board's strategic plan. As much of the feedback related to the Board and staff's work was overwhelmingly positive, themes identified revolve around leveraging current strengths and expanding services to increase collaboration and reach more business and jobseeker customers.

The five goals below were identified as focuses of the Board's work for the next three to five years. Each will be expanded upon in the following pages, including specific feedback gathered and strategies identified for working toward the goals.

- GOAL 1:** Adopt a sector strategy approach that drives career pathways and addresses individual business services
- GOAL 2:** Build on the strong service delivery structure to provide access to the comprehensive talent pool
- GOAL 3:** Strengthen board member engagement
- GOAL 4:** Serve as the convener for talent development in the area
- GOAL 5:** Tell the talent development story of Citrus, Levy and Marion Counties



GOAL 1: Adopt a sector strategy approach that drives career pathways and addresses individual business services

- Strategy 1.1 Strengthen and/or launch sector partnerships in the region
- Strategy 1.2 Provide proactive solutions-based business services to individual companies
- Strategy 1.3 Serve as the source of demand information for career pathways in the area
- Strategy 1.4 Strengthen the feedback loop between business services and CareerSource centers

Adopting and implementing a sector strategy approach is one of the top priorities of the Board which will create a mechanism to ensure career pathways and services to job seekers will be demand-driven and informed by industry.

While sector-based initiatives exist in some industries, they can be strengthened through launching more coordinated partnerships that meet regularly to be proactive about meeting the needs of the region's targeted industries.

Sector partnerships can greatly contribute to addressing any skills gaps issues that exist in the community. Skills gaps can be most effectively addressed when employers come to the table and work directly with partners and service providers to brainstorm solutions – and a sector partnership can provide exactly that “table” to host the conversation. CareerSource CLM can be the go-to source of demand information by combining its current LMI capabilities with the information and needs that come directly from these conversations with employers.

While strengthening sector partnerships will allow CareerSource CLM and its partners to hone in on *collective* industry needs and trends, it is also important to continue to provide value-adding, solutions-based business services to individual businesses. The CareerSource CLM business services staff can build on its collaborative approach to addressing business needs with other organizations by establishing a common approach to:

- Proactively target outreach to businesses in priority sectors and adopt a shared approach with partners – With partners utilizing an agreed upon approach to targeting businesses, business contacts and meetings can be conducted by partners so that services are not duplicated and/or partners do not “knock on the same doors.” This will not only avoid duplication, but also increase penetration into the market.
- Identifying standard information that will be collected from businesses by all partners conducting business outreach – With all partners gathering consistent information, the team will be able to identify the *comprehensive* needs of the business.
- Determining how information will be shared among partners – Once consistent information is gathered, partners will be able to share information with the entire team and identify how the team's collective services and resources can benefit the company.



- Providing a seamless and comprehensive solution to business needs – With partners ready to provide services to the business, the team will need to develop a way of providing those services – which will sometimes be from multiple agencies and organizations – in a way that feels seamless and systematic to the business.

The information gathered through sector partnerships and through targeted services to individual businesses will benefit all other CareerSource services if it is shared widely with staff and other customers. Strengthening the feedback loop means ensuring that information that business-facing staff gather is shared with jobseeker-facing staff so that jobseekers have a clear and accurate picture of what local employers are looking for in new employees. The reverse communication is just as important – staff serving jobseekers can provide business services staff with a picture of the talent pool, giving employers an idea of where to look for new talent.



GOAL 2: Build on the strong service delivery structure to provide access to the comprehensive talent pool

- Strategy 2.1 Expand self-service options available to jobseekers
- Strategy 2.2 Expand connections to vocational rehabilitation, adult education, and TANF programs
- Strategy 2.3 Expand work-based learning opportunities
- Strategy 2.4 Expand talent pool to reach professional jobseekers

Input from Board discussions and partner interviews emphasized that the services and delivery structure of CareerSource are effective and appreciated in the community. Access to services is a strength, with multiple locations found throughout the region and two mobile units that help to reach even more areas.

Leveraging technology within service delivery is one of the emphasized roles of a local board under WIOA. Finding effective ways to incorporate technology through self-service options will allow CareerSource to serve more customers and reach new populations who may not be likely to enter the CareerSource center, such as youth or professional jobseekers. Providing more self-service options also allows case managers to focus more attention on those jobseekers who need the most one-on-one assistance.

CareerSource CLM already has a solid foundation for collaboration with partners, such as vocational rehabilitation. These partnerships should be leveraged and expanded, making closer connections with programs like Adult Education and Vocational Rehabilitation to find more efficiencies in serving common customers or coordinating overlapping services. This could mean more integration of staff, or finding efficiencies within certain programs. More collaboration and eliminating duplicity will allow for an increase in both the number served and the kinds of programs offered.

The Board and CareerSource staff want to make sure the community knows that they provide services for the full range of jobseekers and businesses, including services geared toward highly-skilled, highly-educated individuals and positions. To make sure this is apparent within the community, specific services for this category of jobseeker should be created and marketed to both businesses and participants, addressing both the supply and demand side of the talent equation.



GOAL 3: Strengthen board member engagement

- Strategy 3.1 Develop a robust Board member orientation and education process
- Strategy 3.2 Focus Board meetings on strategic and/or informational issues and discussions
- Strategy 3.3 Ensure investments are strategic and support the organization’s mission and strategic priorities
- Strategy 3.4 Clarify ways for Board members to get involved outside of Board and committee meetings

Strengthening board member engagement was the second goal that board members and staff considered a top priority. With the geographic spread of board members across the region, it has been difficult to get members all in one place for meetings. To remedy this, meetings have been shifted to allow for call-in access. While this may have increased participation, it has decreased engagement. Increasing board member engagement will improve the Board’s effectiveness and its ability to impact the community through its strategic plan.

To start board members off on the right foot, CareerSource CLM should develop a robust orientation and education process so all board members understand the goals of the Board and their roles as members. This orientation should focus on exciting board members, emphasizing their roles in carrying out the vision of the Board and the opportunities they have to contribute.

- Excite – Initially, it is important to excite new board members about the impact they can have through the talent development system. Promote the benefits they can expect to receive personally and professionally by engaging with the board. Share real, tangible successes of the Board and talent development systems with new board members.
- Engage – Make sure board members understand their role on the board and the value of their perspective, especially business leaders. By relating CareerSource CLM’s efforts to their business and talent development needs, board members will have a tangible understanding of how their time and efforts with the workforce system will impact growth at their business and in the community.
- Educate – The workforce system can be a complicated and sometimes confusing world. Focus board member education on the *strategic, big picture talent development strategies* first and layer tactical and operational information incrementally.

All board members interviewed saw staff as highly effective, however, they do not always understand how they as a Board can support the staff’s efforts. Providing as many opportunities for board members to drive strategic decisions and get involved outside of board meetings will allow for an increased sense of contribution and impact. This could be through committee work, by volunteering in the CareerSource Centers, or at events. Board members representing business



should also be encouraged to utilize the services available from the workforce system if they are not already doing so.

After a strong orientation and education program, board members will be most engaged if meeting discussions are kept to a high-level, strategic focus. Ensure that for every Board meeting, a significant amount of time is spent in discussion or on Board education. One way to encourage this is through the use of a consent agenda. Items that need to be voted on can be sent to the Board in advance of the meeting for review, and therefore do not need to be covered in depth during meetings, leaving more time for strategic discussions. Board members felt that if the expectation is set with new members upfront that reviewing materials is expected before the meetings, this could be an effective tactic.



GOAL 4: Serve as the convener for talent development in the area

- Strategy 4.1 Map existing efforts and resources for talent development in Citrus, Levy, and Marion Counties
- Strategy 4.2 Analyze the alignment of partner plans to identify areas of convergence and identify gaps
- Strategy 4.3 Identifying collaborative priorities and how individual partner efforts support these efforts

CareerSource CLM staff are well engaged in the community. All partners interviewed noted that CareerSource is very responsive when needs arise, and organizations routinely collaborate on individual tasks or projects. However, many noted that collaboration exists mostly on a case-by-case basis throughout the three counties and there is not a continuous outlet for discussing and tackling some of the larger, more systemic talent development issues.

CareerSource CLM is a logical convener for this collaborative effort, especially as this work is emphasized as an important function of the Board under WIOA. With all partners at the table, the Board can lead the effort to begin mapping out all existing programs and initiatives that provide workforce development-related services to understand the landscape of the region. This will help to align goals and activities across organizations, leverage different strengths and opportunities, and reduce duplication of effort.

Serving as a convener will require a high level of effort, especially in the beginning as regular communication and interaction is initiated. Board members will have the opportunity to spread the word throughout the community, however, it will also have implications for CareerSource staff and may require some reorganization to allow for staff to be dedicated to this effort.



GOAL 5: Tell the talent development story of Citrus, Levy and Marion Counties

- Strategy 5.1 Provide labor market information and demand intelligence for the region
- Strategy 5.2 Ensure messaging is accessible and engaging
- Strategy 5.3 Promote successes – not just ours, the larger community’s too
- Strategy 5.4 Market expanded services

CareerSource CLM already has a great foundation for communicating its services and successes through its website, social media marketing, and promotional materials. This is a strength that can be leveraged to make sure CareerSource and the Board are the go-to resource for information about the labor market and talent development system in the region.

CareerSource already has access to and provides a wealth of labor market information to others in the region. As partners and service providers come together for more regular collaboration, this information can be leveraged to ensure that all entities are on the same page, using the same information, and spreading the same message.

In addition to having a consistent message, board members can help to shape communications to ensure that they are presented in an accessible and engaging way that will be understood by businesses and jobseekers who may be unaware of government programs and technical terms.

Accessibility also extends to the user experience on the website. While the communication put forth on the internet is already a strength, it can be strengthened further by making it as user friendly as possible. Those who are unfamiliar with CareerSource should be able to easily understand the services that are provided and access information that is relevant to their needs. In order to understand what will create the best user experience and be most accessible to customers, the Board can research how people and businesses are currently using the website, where they go for information, and what would be the most effective mode of marketing and outreach.

The Board should be able to tell the “talent development story” for the whole region. This includes not only communicating the services and successes of CareerSource, but also from the community at large. Key audiences for information about talent development in the community include local elected officials, businesses and industry, K-12 education stakeholders (teachers, administrators, and counselors), parents, and job seekers. CareerSource can share information when employers are expanding and creating jobs, when other organizations are holding events, or when customers have success in training programs and landing a position in their career field. These stories will help communicate who the Board is, what it supports, and the message that it promotes a community-wide, collaborative strategy toward workforce development.



CITRUS, LEVY, AND MARION REGIONAL LABOR MARKET ASSESSMENT

*All data unless otherwise noted is from the February 2015 Summary of Employment, Demographics, and Community Patterns for Citrus, Levy, and Marion counties created by the Florida Department of Economic Opportunity, Bureau of Labor Market Statistics.

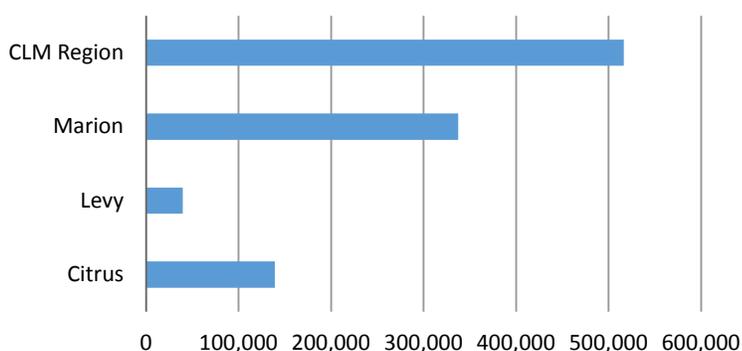
Demographics

The three county region served by CareerSource Citrus Levy Marion is diverse, covering everything from rural agrarian areas to tourist hot spots. With an estimated 516,277 residents, the Citrus Levy Marion (CLM) Region accounts for **2.6%** of Florida's population.

Population, 2013 Estimate



CLM Population by County, 2013 Estimate



All three counties in the CLM Region have relatively more people living in poverty when compared to the Florida state's poverty level (16.3%) from the years 2009-2013. Levy County has a poverty level more than seven percentage points higher than the state, at 23.7%.

When considering poverty, it is important to keep in mind absolute versus relative poverty. For example, the poverty level set by the US Census in 2013 was an annual household income of \$23,834 for a family of 4, which is simply a threshold measure of how much it costs to meet basic needs. While the poverty level is determined by a set dollar amount, this amount **does not** count government transfer payments such as SNAP or housing assistance. In contrast, household income numbers **do** include these amounts, so both should be considered together.

Persons below poverty level, percent, 2009-2013

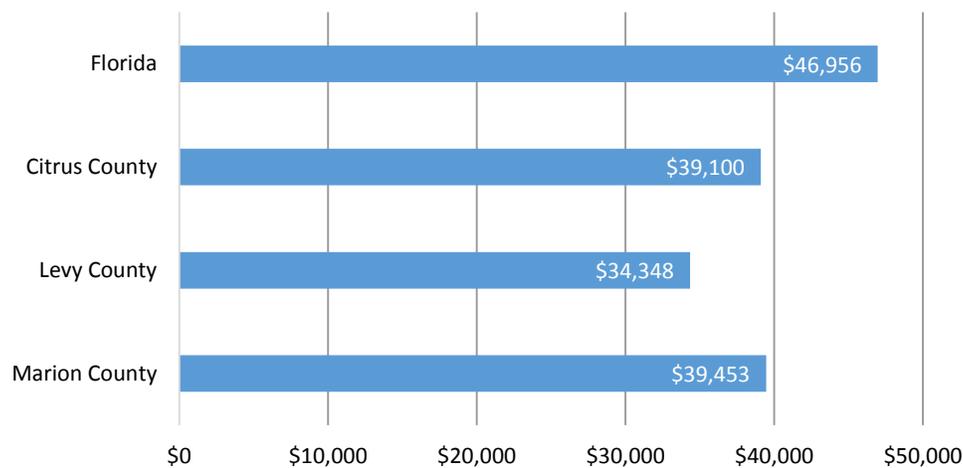
Citrus County	16.80%
Levy County	23.70%
Marion County	18.10%
<i>Florida</i>	<i>16.30%</i>



In addition to higher poverty levels, households in Citrus, Levy, and Marion counties bring in a lower annual median income when compared to all households in the state of Florida. A lagging median wage could be the result of many possible factors, including but not limited to:

- Remnants of the economic crisis, including downward pressure on wages
- Relatively low educational attainment by residents
- Regional occupations and industry growth with generally lower paying jobs (e.g. service industries)
- Rising cost of employee benefits for employers
- Geography, with rural regions tending to have lower median wages and fewer jobs than more urban area

Median Household Income, 2009-2013



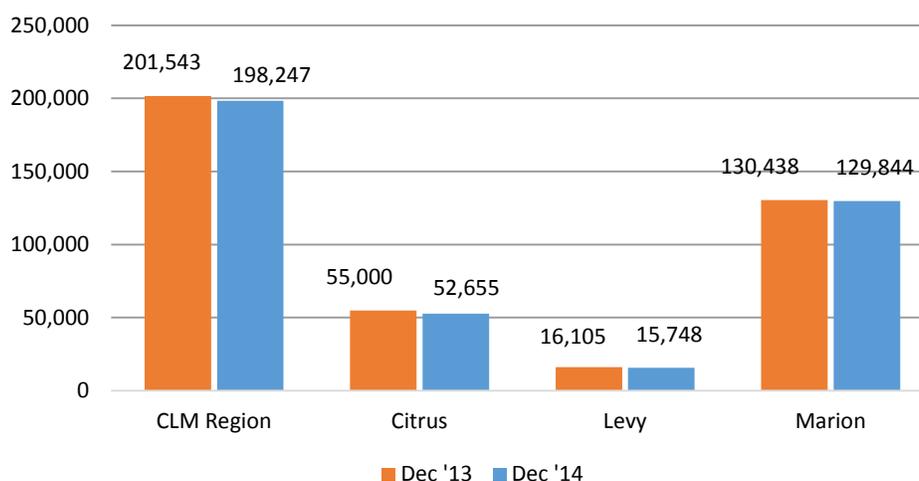
A relatively small population, higher poverty levels, and a lower median household income emphasizes the importance of CareerSource Citrus Levy Marion and the resources CareerSource can uniquely provide to residents of the region.



Labor Force

The total labor force represents the number of people that are both employed and unemployed in a region. As of December 2014, Florida's labor force size is 9,571,000 people. The three county CLM region makes up **2.1%** of Florida's total labor force, with a total of 198,247 people. All three counties saw a slight decline over the twelve-month period from December 2013 to December 2014, for a total regional decrease of 3,296 people over the year.

Labor Force Size
December 2013 vs. December 2014



While the total labor force tells us how many people there are either working or looking for work, the labor force participation rate tells us the ratio of those individuals to the total population considered to be of working age. For example, Marion County has a population aged 16 years or older of 277,618 people. Of these, only 136,003 are considered to be part of the labor force, creating a labor force participation rate of **49.0%**. The remaining 51% of individuals who reside in Marion County aged 16+ are not employed or looking for work. People are not part of the labor force for many reasons, which could include pursuing educational goals, frustration with the job market, older workers reaching retirement, among others.

Labor Force Participation Rates, 2013 Estimates

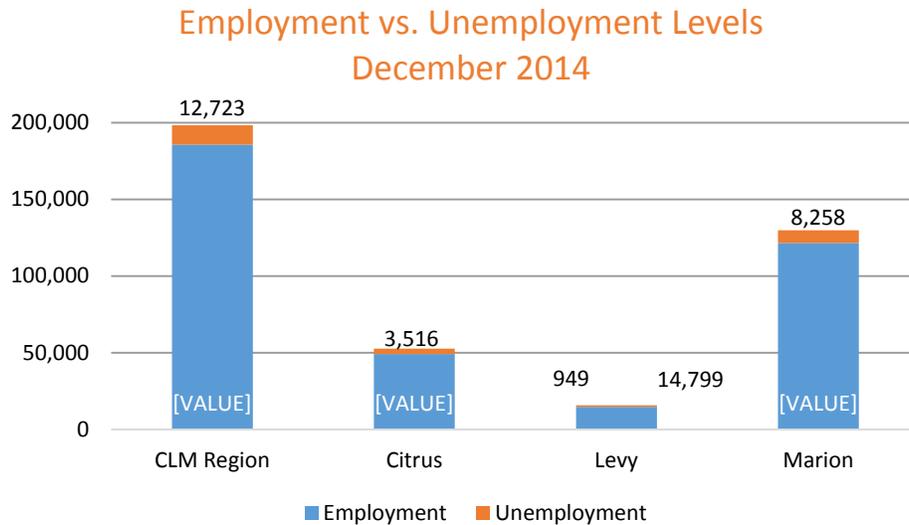
	Citrus County	Levy County	Marion County	CLM Region	Florida
Population 16+	121,243	32,909	277,618	431,770	15,563,534
Total Labor Force	51,945	16,371	136,003	204,319	9,355,809
Labor Force Participation Rate	42.8%	49.7%	49.0%	47.3%	60.1%

Source: US Census, 2013 5-year ACS estimates

Note: Total Labor Force numbers are slightly different due to differing data sources



Labor force participation rates are also directly tied to unemployment rates. If an individual drops out of the labor force, unemployment rates also drop because they are no longer considered to be looking for work.



The unemployment rate for the CLM Region was 6.4% in December 2014, a decrease of 0.6 percentage points from 12 months prior. This means 6.4% of individuals in the labor force in Citrus, Levy, and Marion counties were actively seeking work but could not find a job.

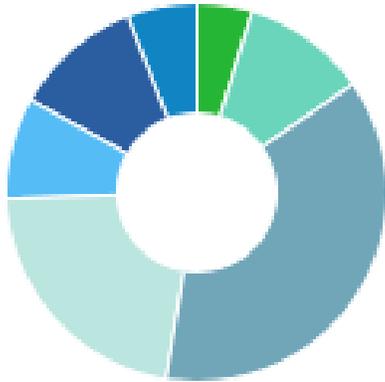
Unemployment Rate

	Dec 2013	Dec 2014	Difference '13 to '14
Citrus County	7.0%	6.7%	-0.3%
Levy County	6.7%	6.0%	-0.7%
Marion County	7.0%	6.4%	-0.6%
CLM Region	7.0%	6.4%	-0.6%
Florida	5.9%	5.4%	-0.5%

Education is becoming increasingly important as the national economy shifts to account for “middle skill” jobs. A high school diploma or equivalent is often no longer enough to gain employment in a career field that pays a high wage and that has high expected growth into the future. The CLM Region is no exception to this shift.

Over half of residents, **52.6%**, of Citrus, Levy, and Marion counties have earned a high school diploma or less. 21.9% have been through some post-secondary education, with the remaining 25.5% of the CLM Region population earning some level of college credential.

Regional Educational Attainment, 2014



Education Level	2014 Population	2014 Percent
● Less Than 9th Grade	18,452	4.7%
● 9th Grade to 12th Grade	41,634	10.6%
● High School Diploma	146,291	37.3%
● Some College	85,794	21.9%
● Associate's Degree	34,070	8.7%
● Bachelor's Degree	42,922	10.9%
● Graduate Degree and Higher	23,338	5.9%

Source: EMSI



Local Economy

In order to know **how** to facilitate this change, it's important to know **what** key assets to leverage. A better understanding of the local economy is a tool to help boost current growth and/or attract new industries that may have similar workforce requirements.

In 2014, when examining the number of jobs within a larger industry, each county in the CLM Region had the same top 5 in terms of number of jobs with the exception of Citrus County, in which Construction replaces Public Administration. These top 5 industries represent 85,067, or **57.4%**, of jobs in the region.

Top 5 Industries by Number of Jobs, 2014

Industry ¹	Citrus County	Levy County	Marion County	CLM Region
Health Care and Social Assistance	7,441	1,911	15,083	24,435
Retail Trade	4,582	1,296	14,933	20,811
Educational Services	4,057	1,580	10,334	15,971
Accommodation and Food Services	2,922	856	9,899	13,677
Public Administration	2,407	1,187	6,579	10,173

¹ Industry defined by 2-digit NAICS code

The top occupations ranked by the number of jobs in the CLM Region in 2014 encompasses **53.6%** of all jobs in the region.

Top 5 Occupations by Number of Jobs, 2014

Occupation ¹	2014 Jobs	2019 Jobs	2014 – 2019 Change	2014 – 2019 % Change	2013 Avg. Hourly Earnings
Office and Administrative Support Occupations	23,337	24,614	1,277	5%	\$14.08
Sales and Related Occupations	17,921	18,914	993	6%	\$14.96
Food Preparation and Serving Related Occupations	13,342	15,064	1,722	13%	\$9.84
Healthcare Practitioners and Technical Occupations	10,569	11,823	1,254	12%	\$33.81
Education, Training, and Library Occupations	7,953	8,653	700	9%	\$20.95

¹ Occupations defined by 2-digit SOC code

Source: EMSI

This high-level account of the top jobs is made more meaningful by taking a deeper look at the occupations that require higher levels of education, since the majority of jobs in the CLM Region require some level of post-secondary education. Most of these jobs unsurprisingly also have a higher average hourly wage. For example, in 2014 there were 3,272 jobs in the CLM Region



categorized as Registered Nurses. The average hourly earnings for these Registered Nurses was \$27.93.

A cursory glance at the number of males versus the number of females employed in each top occupations shows some large gender disparities. When summed, the number of males in the top 10 occupations that require some level of post-secondary education during 2014 was only 4,599. This is far below the number of females in these same occupations, at 11,746. While this is just a snapshot of the people employed in those roles, challenging these gender norms may be another conscious action for CareerSource Citrus Levy Marion to take.

It is also important to note that many of these top occupations also fall into relatively clear career pathways. For example, Nursing Assistants, Medical Assistants, and Registered Nurses all follow the same career track and have similar, if not the same, required credentials. This is generally true for the teaching occupations and business occupations listed as well.

Top 10 Occupations Requiring Education or Certification beyond a High School Diploma* by Number of Jobs, 2014

Occupation ¹	2014 Jobs	Males	Females	Annual Openings	2013 Avg. Hourly Earnings
Registered Nurses	3,272	311	2,961	134	\$27.93
Nursing Assistants	2,504	299	2,205	97	\$11.02
Heavy and Tractor-Trailer Truck Drivers	1,857	1,789	68	73	\$16.79
Elementary School Teachers, Except Special Education	1,846	366	1,480	80	\$26.61
Medical Assistants	1,447	113	1,334	60	\$12.82
Teacher Assistants	1,254	105	1,148	50	\$11.08
Licensed Practical and Licensed Vocational Nurses	1,224	89	1,135	62	\$19.36
Secondary School Teachers, Except Special and Career/Technical Education	1,016	403	613	43	\$26.15
General and Operations Managers	997	751	246	46	\$48.57
Accountants and Auditors	929	373	556	39	\$32.31

*Includes occupations with a typical entry level education of: Postsecondary non-degree award, Some college no degree, Associate's degree, Bachelor's degree, Master's degree, Doctoral or professional degree

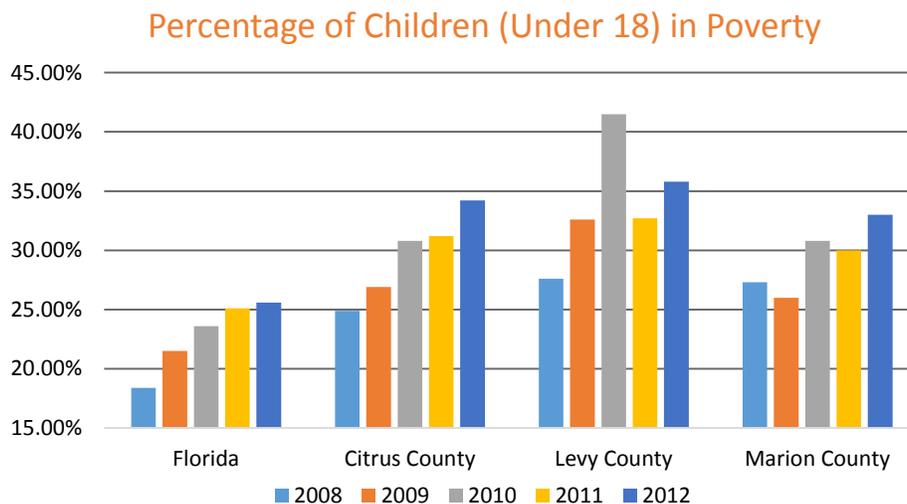
¹ Occupations defined by 5-digit SOC code

Source: EMSI



Youth Trends

Though not consistent year-to-year, between 2008 and 2012 the rate of children under the age of 18 living in poverty has continued to rise. This is true for the CLM Region as well as the state of Florida as a whole. This growing relative poverty is alarming, particularly when coupled with other barriers to children’s success that often accompanies growing up in poverty.



Source: Annie E. Casey Foundation, Kids Count Data Center

Within the CLM Region, 88.4% of students were enrolled in public schools during the 2012-2013 academic year, with 7.4% enrolled in private schools and the remaining 4.2% registered as home schooled. This generally mirrors the same distribution seen across the United States.

School Enrollment, 2012-2013

	Citrus County	Levy County	Marion County	CLM Region
Public School Enrollment	15,307	5,660	41,990	62,957
Private School Enrollment	883	240	4,164	5,287
Children Registered in Home Education Programs	959	242	1,785	2,986
All School Enrollment	17,149	6,142	47,939	71,230

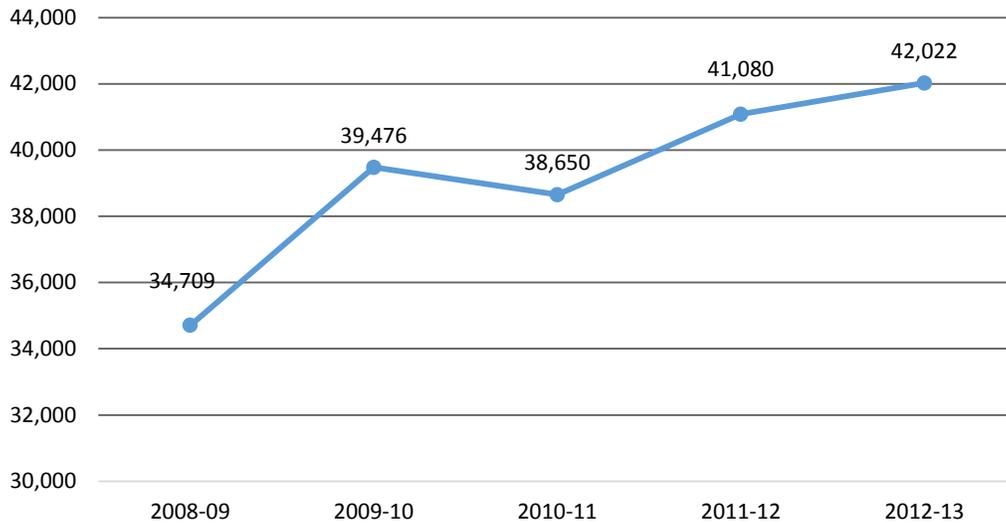
Source: Annie E. Casey Foundation, Kids Count Data Center

Of the students attending schools participating in the federal National School Lunch Program in Citrus, Levy, and Marion counties, 42,022 students were eligible to receive free/reduced lunch. The National School Lunch Program subsidizes nutritionally balanced meals to children in eligible public, private, and residential child care institutions while students are in school. To qualify for a free meal, the household the student belongs to must earn at or below 130% of the federal poverty level. To qualify for a reduced price meal, a students’ household income must be at or below 185% of the federal poverty level. As such, the growing rate of poverty for children aged



18 or under matches the trend in growing numbers of students eligible to participate in this federal program and receive meals while at school.

Students Eligible to Participate in Free/Reduced Lunch, CLM Region 2008-2013



Source: Annie E. Casey Foundation, Kids Count Data Center

School graduation rates are a measure of how many students successfully complete their expected education attainment within the expected time frame. In the case of youth in the CLM Region, this would be how many students are graduating from high school within a four-year time period as counted as part of a cohort.

All three counties witnessed a higher graduation rate for the 2012-2013 school year than the state of Florida (75.6%), with Citrus County leading the group at 80.1%. However, these rates are trailing the national aggregates. The U.S. as a whole saw an overall graduation rate of 80% during the same school year according to the U.S. Department of Education.

2012-2013 Graduation Rate, per 100 Students

Citrus County	Levy County	Marion County	Florida
80.1%	77.8%	76.7%	75.6%

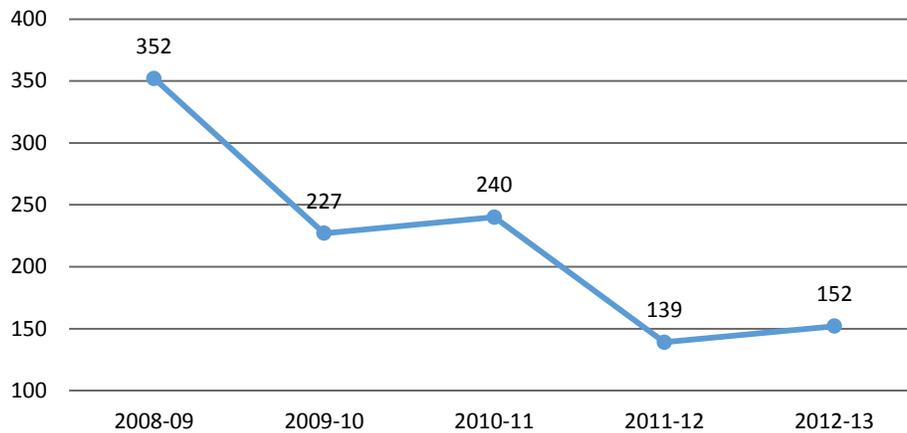
Source: Annie E. Casey Foundation, Kids Count Data Center

Educational success and poverty are widely identified as risk factors for youth and increase the chance that a young person aged 17 or under will participate in illegal behaviors, also called juvenile delinquency. A delinquent act is an offense that would be considered a crime if done by an adult.



Generally, from 2008-2013 the number of youth delinquency cases committed to the Department of Juvenile Justice decreased. Commitment to residential programs can range in security level and length of time and may include training programs as is appropriate by law and determined by the juvenile court system.

**Number of Youth Delinquency Cases Committed
CLM Region 2008-2013**



Source: Annie E. Casey Foundation, Kids Count Data Center

This young population should be given special consideration when considering the future of the workforce, particularly when thinking about short-term preventative or intervention activities that can begin now. Juvenile violence is a national issue that can only be addressed at the local level, and the number of youth delinquency cases arguably represents the group who need to see opportunities for practical skill-building—whether educational or otherwise—to become productive members of society and active members of the labor force into the future.



CITRUS, LEVY, AND MARION REGIONAL TARGET INDUSTRIES

In the CLM region, the recommended target industry clusters include:

- Manufacturing
- Healthcare
- Transportation and Warehousing

Each of these clusters is comprised of between 4 and 15 industry groups (6-digit NAICS codes). To determine the industry groups included in the region's target industry clusters, all 6-digit NAICS codes were analyzed and included or eliminated based on four main factors. Each industry group included follows the following criteria:

1. Current employment of more than 100 workers

And one or more of:

2. Positive competitive effect – industry group experienced growth based on local factors
3. Positive expected change – industry group experienced growth based on a combination of industry and national factors
4. Location quotient above 1.2 – industry group has a local employment concentration of at least 1.2 times the national average.

Also included is a fourth industry cluster, as a more “aspirational” cluster for the region – Information Technology. While it may not have the current strength and size in the economy as the other clusters, segments of the industry are growing quickly, and occupations classified as IT are critical to industries throughout the economy. The growth and potential of this cluster present an opportunity for the region moving forward.

The following pages provide profiles of each target industry cluster, focusing on each included industry and their characteristics, regional business establishments, cluster economic impact, associated occupations, and supply requirements.

A Note on Data

All data and statistics used in this report were sourced from Economic Modeling Specialists Intl. (EMSI) 2015.1 data, unless otherwise noted. EMSI compiles data from a variety of federal, state, and private data sources. Projections are backwards-looking, which means that future projections are partially based upon 15-year trends and may not accurately predict real-time demand. Therefore, it will be critical to update projections, confirm employer demand, and assess workforce requirement on a regular basis.



Growing Cluster in Manufacturing

The growing cluster in Manufacturing includes 9 6-digit NAICS code industries (shown in the table). Employment in this cluster grew 81% from 2009 to 2014 in the CLM region, 5 times higher compared to the rate of nation (14%).

Growth in this industry cluster was largely due to the region's competitive advantages. Regional factors account for around 90% new jobs in the following industries: All Other Miscellaneous Food Manufacturing (281, 94% of new jobs), All Other Miscellaneous Fabricated Metal Product Manufacturing (197, 87%), and Flat Glass Manufacturing (184, 95%).

Several individual industries within this cluster have very high Location Quotient (LQ), the most notable being Flat Glass Manufacturing with a location quotient of 24.24.¹ The industries with LQ above 2 are highlighted in blue. The concentration of workers in these industries in the region is significantly higher compared to the national concentration.

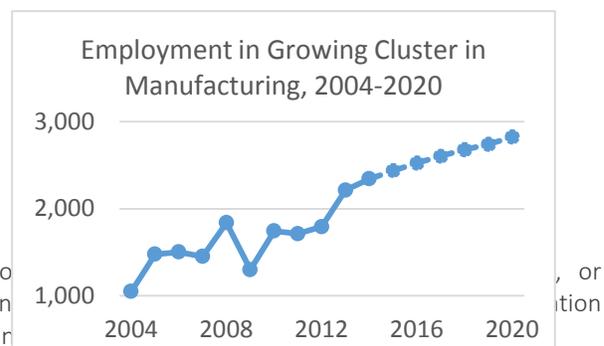
**GROWING CLUSTER IN
MANUFACTURING
AT A GLANCE**

Establishments	37
Employment	2,344
Average Earnings	\$50,508

Industry	2014 Jobs	Growth, 2009-2014	Growth 2014- 2020	Average Earnings	LQ
All Other Miscellaneous Fabricated Metal Product Manufacturing	511	227	218	\$54,049	6.53
All Other Miscellaneous Food Manufacturing	438	299	123	\$51,436	15.46
Boat Building	287	71	-105	\$46,970	8.44
Upholstered Household Furniture Manufacturing	272	93	142	\$42,359	4.83
Flat Glass Manufacturing	265	194	70	\$47,746	24.24
Machine Shops	172	35	27	\$44,008	0.60
Surgical Appliance and Supplies Manufacturing	151	48	12	\$56,458	1.50
Mining Machinery and Equipment Manufacturing	128	38	-1	\$63,858	10.04
Steel Foundries (except Investment)	121	40	-5	\$52,720	6.57

Employment Trends

Manufacturing companies in this cluster employ 2,344 individuals in 2014 in this region. Employment in this cluster has been increasing



¹ Location quotient measures the regional concentration of a demographic group as compared to the state or national concentration of specific industries to the national concentration of these industries.



since 2012 and is projected to continue to grow over the coming years.

Economic Impact

If the CLM region attracts 100 new jobs within this industry cluster, the region can expect a total impact of 209 new jobs (including the initial +100) and \$10.3 million in combined annual earnings for the region.



Associated Occupations

The following table displays the top ten occupations that are most often required to staff companies within the growing industry cluster in Manufacturing. Seven of these positions are Production Occupations.

Hourly earnings for these occupations in this region range from \$10.51 (Laborers and Freight, Stock, and Material Movers, Hand) to \$23.88 (First-Line Supervisors of Production and Operating Workers).² The median hourly earnings above the regional median (\$16) are highlighted in yellow.

Eight of the 10 occupations will require a High School diploma or equivalent. One occupation, First-Line Supervisors of Production and Operating Workers, requires a post-secondary non-degree award. Nine of these occupations rely on on-the-job training.

Occupation	2014 Jobs	Median Earnings	Education Requirement	Training Requirement
Team Assemblers	136	\$11.46	HS diploma or equiv.	Moderate OJT
First-Line Supervisors of Production and Operating Workers	103	\$23.88	Postsecondary non-degree award	None

² These values represent the wage levels for these occupations across all industries, not just in this industry cluster.



Machinists	102	\$14.93	HS diploma or equiv.	Long-term OJT
Welders, Cutters, Solderers, and Brazers	97	\$14.52	HS diploma or equiv.	Moderate OJT
Packaging and Filling Machine Operators and Tenders	81	\$11.07	HS diploma or equiv.	Moderate OJT
Fiberglass Laminators and Fabricators	67	\$13.47	HS diploma or equiv.	Moderate OJT
Laborers and Freight, Stock, and Material Movers, Hand	62	\$10.51	Less than high school	Short-term OJT
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	56	\$21.06	HS diploma or equiv.	Moderate OJT
Cabinetmakers and Bench Carpenters	50	\$15.58	HS diploma or equiv.	Moderate OJT
Industrial Machinery Mechanics	46	\$19.19	HS diploma or equiv.	Long-term OJT

Supply Requirements

Combining these growing industries in manufacturing, this cluster in Citrus, Levy, and Marion Counties purchases nearly \$286 million in goods and services for its operation. The top three industries from which this group purchases are Crop Production (\$30.4 M); Corporate, Subsidiary, and Regional Managing Offices (\$17.9 M), and Animal Production and Aquaculture (\$12.9 M). It is worth noticing that Machine Shops (bolded) is part of this growing manufacturing cluster, and General Freight Trucking, Long-Distance, Truckload (bolded) belongs to the Transportation and Warehousing cluster. The third column in the table below shows the amount of purchases from these industries which are sourced from companies that are located within Citrus, Levy, and Marion Counties.

Industry	Amount Sourced	Percent In-Region
Crop Production	\$30,468,878	14.3%
Corporate, Subsidiary, and Regional Managing Offices	\$17,932,899	2.5%
Animal Production and Aquaculture	\$12,859,534	23.9%
Iron and Steel Mills and Ferroalloy Manufacturing	\$12,321,422	0.0%
Wholesale Trade Agents and Brokers	\$6,475,278	13.6%
Other Aluminum Rolling, Drawing, and Extruding	\$3,637,611	0.0%
General Freight Trucking, Long-Distance, Truckload	\$3,593,443	41.9%
Corrugated and Solid Fiber Box Manufacturing	\$3,554,874	5.1%
Machine Shops	\$3,415,743	8.3%
Flour Milling	\$3,363,270	0.0%



Growing Cluster in Healthcare

The growing cluster in Healthcare includes 15 6-digit NAICS code industries (shown in the table). Employment in this cluster grew 28% from 2009 to 2014 in the CLM region, higher compared to the rate of nation (20%).

The largest driver of growth is Offices of Physicians (except Mental Health Specialists) (with 603 new jobs created), followed by Nursing Care Facilities (Skilled Nursing Facilities) (428), and Services for the Elderly and Persons with Disabilities (395). It is worth noticing

that regional factors account for over 90% of new jobs in the following industries: Nursing Care Facilities (Skilled Nursing Facilities) (406, 95% of new jobs), Residential Mental Health and Substance Abuse Facilities (285, 99%), Outpatient Mental Health and Substance Abuse Centers (252, 95%).

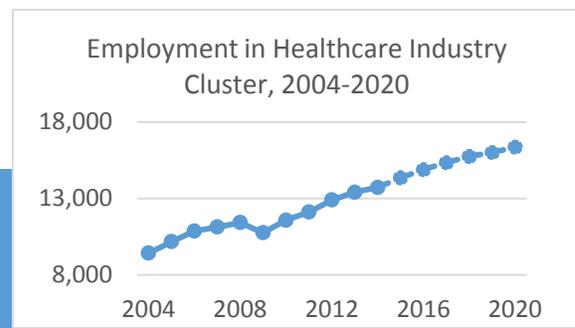
The industries with LQ above 2 are highlighted in blue. The concentration of workers in these industries in the region is more than doubled compared to the national concentration.

**GROWING CLUSTER IN
HEALTHCARE
AT A GLANCE**

Establishments	751
Employment	13,724
Average Earnings	\$52,079

Industry	2014 Jobs	Growth, 2009-2014	Growth 2014- 2020	Average Earnings	LQ
Offices of Physicians (except Mental Health Specialists)	5,289	603	699	\$76,843	2.20
Nursing Care Facilities (Skilled Nursing Facilities)	3,385	428	217	\$35,025	2.11
Assisted Living Facilities for the Elderly	902	311	185	\$26,552	2.33
Offices of Physical, Occupational and Speech Therapists, and Audiologists	800	187	200	\$50,778	2.34
Services for the Elderly and Persons with Disabilities	645	395	237	\$18,603	0.44
Continuing Care Retirement Communities	612	108	268	\$26,965	1.45
Outpatient Mental Health and Substance Abuse Centers	346	267	167	\$41,420	1.68
Residential Mental Health and Substance Abuse Facilities	316	288	187	\$38,563	1.55
Specialty (except Psychiatric and Substance Abuse) Hospitals	292	119	219	\$48,745	1.47
Child and Youth Services	276	58	49	\$47,097	1.41
Diagnostic Imaging Centers	216	18	63	\$44,903	2.91
Ambulance Services	202	67	40	\$60,605	1.16
Offices of Optometrists	182	53	9	\$40,778	1.43
Offices of All Other Miscellaneous Health Practitioners	149	60	34	\$48,628	1.14
Psychiatric and Substance Abuse Hospitals	111	3	61	\$56,654	1.10

Employment Trends





As of 2014, there are 13,724 workers employed by this growing cluster in Healthcare in this region. The industry cluster has been growing since 2009 and the trend is projected to continue during 2014-2020.

Economic Impact

If the CLM region attracts 100 new jobs within this industry cluster, the region can expect a total impact of 131 new jobs (including the initial +100) and \$6.3 million in combined annual earnings for the region.



Associated Occupations

The following table displays the top ten occupations that are most often required to staff companies within the growing Healthcare industry cluster. Hourly earnings for these occupations in this region range from \$8.20 (Maids and Housekeeping Cleaners) to \$78.69 (Physicians and Surgeons, All Other). The median hourly earnings above the regional median (\$16) are highlighted in yellow.

The occupations in this cluster have diversified education and training requirements compared to the other industries. Five of the 10 occupations require postsecondary education, such as Postsecondary non-degree award (3), Associate's degree (1), and Doctoral or professional degree (1), while the three occupations with the lowest wage only require less than high school education. Half of these occupations rely on on-the-job training. One occupation, Physicians and Surgeons, All Other, requires Internship/residency.

Occupation	2014 Jobs	Median Earnings	Education Requirement	Training Requirement
Nursing Assistants	1,850	\$10.64	Postsecondary non-degree award	None
Medical Assistants	1,128	\$12.66	Postsecondary non-	None



			degree award	
Registered Nurses	910	\$28.05	Associate's degree	None
Licensed Practical and Licensed Vocational Nurses	814	\$18.72	Postsecondary non-degree award	None
Receptionists and Information Clerks	585	\$11.73	HS diploma or equiv.	Short-term OJT
Physicians and Surgeons, All Other	424	\$78.69	Doctoral or professional degree	Internship/residency
Home Health Aides	405	\$9.12	Less than high school	Short-term OJT
Maids and Housekeeping Cleaners	366	\$8.20	Less than high school	Short-term OJT
Personal Care Aides	358	\$8.68	Less than high school	Short-term OJT
Medical Secretaries	340	\$13.36	HS diploma or equiv.	Moderate OJT

Supply Requirements

Combining these growing industries in Healthcare, this cluster in Citrus, Levy, and Marion Counties purchases nearly \$464 million in goods and services for its operation. The top three industries from which this group purchases are Corporate, Subsidiary, and Regional Managing Offices (\$28.5 M); Lessors of Residential Buildings and Dwellings (\$28.0 M); and Lessors of Nonresidential Buildings (except Miniwarehouses) (\$25.7 M).

Industry	Amount Sourced	Percent Region	In-
Corporate, Subsidiary, and Regional Managing Offices	\$28,501,140	2.4%	
Lessors of Residential Buildings and Dwellings	\$28,001,520	30.1%	
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$25,694,777	44.0%	
Offices of Real Estate Agents and Brokers	\$19,718,525	43.9%	
Direct Property and Casualty Insurance Carriers	\$14,624,222	12.9%	
Other Activities Related to Real Estate	\$13,799,544	35.4%	
Temporary Help Services	\$12,569,600	48.1%	
Direct Health and Medical Insurance Carriers	\$10,629,338	0.5%	
Residential Property Managers	\$9,626,452	14.4%	
Direct Life Insurance Carriers	\$9,588,789	2.8%	



Growing Cluster in Transportation and Warehousing

The growing cluster in Transportation and warehousing includes 4 6-digit NAICS code industries (shown in the table). Employment in this cluster grew 53% from 2009 to 2014 in the CLM region, much higher compared to the rate of nation (10%).

The largest driver of growth is General Freight Trucking, Long-Distance, Truckload, which increased employment by 576 jobs in the last five years. Regional factors account for a significant portion of new jobs (550, 95%). Additionally, the location quotient (LQ) of this industry is 2.18, indicating that this region has a higher concentration of the industry than the national average.

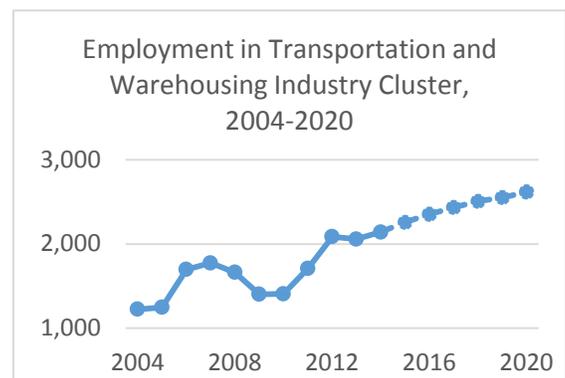
GROWING CLUSTER IN TRANSPORTATION AND WAREHOUSING AT A GLANCE

Establishments	88
Employment	2,141
Average Earnings	\$42,633
Job Growth 2009-2014	748 (53%)

Industry	2014 Jobs	Growth, 2009-2014	Growth 2014-2020	Average Earnings	LQ
General Freight Trucking, Long-Distance, Truckload	1,300	576	333	\$38,885	2.18
Couriers and Express Delivery Services	370	63	8	\$44,138	0.70
General Warehousing and Storage	363	27	109	\$57,989	0.59
Local Messengers and Local Delivery	108	72	24	\$31,630	1.60

Employment Trends

As of 2014, companies in this cluster employ 2,141 individuals. Projections show the region's employment increasing in the coming years, with employment rising to 2,616 by 2020.



Economic Impact



If the CLM region attracts 100 new jobs within this industry cluster, the region can expect a total impact of 128 new jobs (including the initial +100) and \$4.8 million in combined annual earnings



for the region.

Associated Occupations

The following table displays the top ten occupations that are most often required to staff companies within the growing Transportation and Warehousing industry cluster. Most of these positions fall into Office and Administrative Support Occupations and Transportation and Material Moving Occupations.

Hourly earnings for these occupations in this region range from \$10.51 (Laborers and Freight, Stock, and Material Movers, Hand) to \$23.66 (First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators). The median hourly earnings above the regional median (\$16) are highlighted in yellow.

Eight of the 10 occupations will require a High School diploma or equivalent. One occupation, Heavy and Tractor-Trailer Truck Drivers, requires a post-secondary non-degree award. Nine of these occupations rely on on-the-job training.

Occupation	2014 Jobs	Median Earnings	Education Requirement	Training Requirement
Heavy and Tractor-Trailer Truck Drivers	846	\$15.92	Postsecondary non-degree award	Short-term OJT
Laborers and Freight, Stock, and Material Movers, Hand	285	\$10.51	Less than high school	Short-term OJT
Light Truck or Delivery Services Drivers	213	\$12.10	HS diploma or equiv.	Short-term OJT
Couriers and Messengers	64	\$13.18	HS diploma or equiv.	Short-term OJT
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	49	\$23.66	HS diploma or equiv.	None
Dispatchers, Except Police, Fire, and Ambulance	47	\$14.75	HS diploma or equiv.	Moderate OJT
Cargo and Freight Agents	46	\$19.51	HS diploma or equiv.	Short-term OJT
Customer Service Representatives	46	\$12.90	HS diploma or equiv.	Short-term OJT
Office Clerks, General	44	\$10.89	HS diploma or equiv.	Short-term OJT



Bus and Truck Mechanics and Diesel Engine Specialists	41	\$18.91	HS diploma or equiv.	Long-term OJT
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Supply Requirements

Combining these growing industries in Transportation and Warehousing, this cluster in Citrus, Levy, and Marion Counties purchases nearly \$160 million in goods and services for its operation. The top three industries from which this group purchases are Petroleum Refineries (\$39.4 M); Couriers and Express Delivery Services (\$12.1 M), and US Postal Service (\$5.3 M). Bolded industries are themselves part of the Transportation and Warehousing cluster.

Industry	Amount Sourced	Percent Region	In-
Petroleum Refineries	\$39,390,586	0.0%	
Couriers and Express Delivery Services	\$12,097,676	51.6%	
US Postal Service	\$5,331,963	48.2%	
General Warehousing and Storage	\$5,155,858	24.1%	
Freight Transportation Arrangement	\$4,022,579	23.4%	
Corporate, Subsidiary, and Regional Managing Offices	\$2,986,633	2.5%	
Temporary Help Services	\$2,577,834	45.0%	
Wholesale Trade Agents and Brokers	\$2,504,193	14.3%	
Lessors of Residential Buildings and Dwellings	\$2,372,242	30.2%	
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$2,176,827	42.5%	



Aspirational Cluster: Information Technology

The IT industry is an “aspirational” industry cluster for Citrus, Levy, and Marion Counties. While the presence of the cluster is not quite as large as others in the region, it is recognized as an important driver of the economy and an area for a lot of growth in the coming years.

The parameters used to define the IT industry in this section were adapted from a StatsAmerica definition of the Information Technology and Telecommunications cluster. This cluster covers a wide range of related industries, including manufacturing of IT and telecommunications equipment, equipment wholesalers, telecommunications service providers, and computer programming, system design, and consulting services. Because this is a customized cluster, there is some overlap with other industries, mainly in the manufacturing area.

From this customly defined IT industry cluster, eight industries have been identified below as those which show the most projected growth before 2020. These industries as a group are referred to as the growing IT industry cluster throughout this section.

GROWING IT CLUSTER
AT A GLANCE

Establishments	381
Employment	2,792
Average Earnings	\$52,141
Proj. Job Growth by 2020	203

Industry	2014 Jobs	Proj. Growth '14-'20	% Growth	Average Earnings	LQ
Analytical Laboratory Instrument Manufacturing	151	89	59%	\$46,192	6.31
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	162	62	38%	\$67,039	3.52
Software Publishers	36	59	164%	\$56,213	0.27
Wireless Telecommunications Carriers (except Satellite)	91	42	46%	\$51,996	0.79
Other Electronic Parts and Equipment Merchant Wholesalers	61	30	49%	\$52,726	0.72
Data Processing, Hosting, and Related Services	91	27	30%	\$40,030	0.41
Custom Computer Programming Services	200	21	11%	\$60,423	0.22
Other Management Consulting Services	84	19	23%	\$44,972	0.99

While employment across these industries is lower than some others in the CLM region, the percent of expected growth is significant, as high as a 164% increase for Software Publishers. These industries all provide high wages, relative to other industries in the region, and all eight provide higher average earnings than Citrus, Levy, and Marion Counties’ median household income – the highest being Marion County at \$39,453. Average earnings across these eight growing industries ranges from \$40,030 in Data Processing, Hosting, and Related Services to \$67,039 in Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables. Two of the growing industries have very strong location



quotients, measuring the concentration of the industry in comparison to the rest of the nation. Analytical Laboratory Instrument Manufacturing is 6.31 times more concentrated in Citrus, Levy, and Marion Counties than the national average, while Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables is 3.52 times more concentrated.

Economic Impact

If the CLM region attracts 100 new jobs within the growing IT industry cluster, the region can expect a total impact of 144 new jobs (including the initial +100) and \$7.2 million in combined annual earnings for the region.



Associated Occupations

The following table displays the top ten occupations that are most often required to staff companies within the growing IT industry cluster.

Occupation	2014 Jobs	Median Hourly Earnings	Education Requirements	Training Requirements
Customer Service Representatives	62	\$12.90	HS diploma or equiv	Short-term OJT
Sales Representatives, Services, All Other	37	\$18.60	HS diploma or equiv	Short-term OJT
Software Developers, Applications	30	\$30.41	Bachelor's degree	None
Computer Programmers	29	\$31.05	Bachelor's degree	None
Computer User Support Specialists	27	\$18.28	Some college, no degree	Moderate OJT
Business Operations Specialists, All Other	26	\$23.82	HS diploma or equiv	None
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	24	\$21.06	HS diploma or equiv	Moderate OJT
Computer Systems Analysts	24	\$25.09	Bachelor's degree	None
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	22	\$12.88	HS diploma or equiv	Short-term OJT
Management Analysts	22	\$27.96	Bachelor's degree	None



The IT industry offers employment opportunities within a wide range of occupations, including technical positions, as well as support. Wages for these positions range from \$12.88 on the low end for Secretaries and Administrative Assistants, to \$31.05 on the high end for Computer Programmers. Five of the top 10 occupations require more education than a high school degree, with four of those five requiring at least a Bachelor’s degree. Those positions requiring just a high school degree typically involve some level of on-the-job training.

Supply Requirements

Combining the top eight growing industries, the growing IT industry cluster in Citrus, Levy, and Marion Counties purchases nearly \$82.3 million in goods and services for its operation. The top three industries from which this group purchases are Wired Telecommunications Carriers (\$7.5 M), Semiconductor and Related Device Manufacturing (\$4.2 M), and Temporary Help Services (\$2.5 M). Bolded industries are themselves part of the IT cluster. In total, 21.4% of goods and services purchased by the IT industries come from within this region, while 78.6% are sourced from elsewhere.

Industry	Amount Sourced	Percent Purchased In-Region
Wired Telecommunications Carriers	\$7,538,078	36%
Semiconductor and Related Device Manufacturing	\$4,158,764	0%
Temporary Help Services	\$2,549,920	47%
Corporate, Subsidiary, and Regional Managing Offices	\$2,503,504	2%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$2,084,654	10%
Lessors of Residential Buildings and Dwellings	\$1,867,012	30%
Engineering Services	\$1,859,823	11%
Wireless Telecommunications Carriers (except Satellite)	\$1,803,850	25%
Software Publishers	\$1,767,597	1%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$1,713,206	44%

Information Technology Occupations

While IT industries have the potential for significant growth in the region, information technology occupations are not restricted to these industries, and are essential to many industries across the economy.

Analyzing the Information Technology Career Cluster, as defined by O*NET, the following occupations are the top ten that are projected to experience the most growth in Citrus, Levy, and Marion Counties by 2020.



Occupation	2014 Jobs	Proj. Growth '14-'20	% Growth	Median Hourly Earnings
Computer User Support Specialists	279	34	12%	\$18.28
Software Developers, Applications	131	28	21%	\$30.41
Computer Systems Analysts	144	25	17%	\$25.09
Software Developers, Systems Software	82	15	18%	\$33.72
Network and Computer Systems Administrators	118	13	11%	\$27.69
Computer and Information Systems Managers	56	12	21%	\$44.81
Web Developers	68	10	15%	\$17.53
Computer Programmers	132	7	5%	\$31.05
Graphic Designers	153	6	4%	\$15.05
Architectural and Engineering Managers	74	6	8%	\$52.92

The Information Technology Career Cluster is projected to grow by 182 jobs between 2014 and 2020. Median hourly earnings for the top growing occupations range from \$15.05 for Graphic Designers, all the way to \$52.92 for Architectural and Engineering Managers.

The occupations in this career cluster are found in a variety of industries. Only three of the top industries that are providing IT jobs are also found in the IT industry cluster (those industries are bolded below), reinforcing that Information Technology careers can be found throughout the economy. The table below shows the top industries in which IT occupations are currently found in Citrus, Levy, and Marion Counties.

Industry	Career Cluster 2014 Jobs	Proj. Growth '14-'20	% Growth
Custom Computer Programming Services	111	17	15%
Computer Systems Design Services	99	4	4%
Elementary and Secondary Schools (Local Government)	62	4	6%
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	55	0	0%
Local Government, Excluding Education and Hospitals	55	5	9%
State Government, Excluding Education and Hospitals	52	1	2%
Temporary Help Services	38	7	18%
Commercial Banking	37	(1)	(3%)
Wired Telecommunications Carriers	37	(2)	(5%)
Graphic Design Services	34	8	24%

ADDENDUM:
Recommendations for Implementing the
Sector Strategy Approach





RECOMMENDATIONS FOR IMPLEMENTING A SECTOR STRATEGY APPROACH FOR WIOA

Recommendation 1: Expand the CareerSource CLM Business Services Team with partner organizations

With WIOA's emphasis on employer engagement and new performance metrics to measure effective business services, a collaborative approach to business outreach and engagement with individual companies will expand penetration into the market, increase employer satisfaction, and result in better outcomes for job seekers in the long-term. A collaborative approach to business services will require CareerSource CLM to expand its business services team to include partner organizations in a formalized, structured way. The Business Services Team should include all organizations in the region that are conducting business outreach and/or business retention and expansion.

Together, these partners can adopt a shared, sector-driven approach to target businesses strategically, gather and share information among the team, and provide seamless solutions to meet business' needs. Through a team approach, CareerSource CLM and its partners can focus on *solutions-based engagements* with businesses that take into account where they are in the business life cycle and form a foundation for long-term relationships.

In expanding the Business Services Team, CareerSource CLM and its partners will need to:

- Clarify roles and responsibilities among all team members
- Develop a partnership agreement outlining roles and responsibilities and consider confidentiality agreements to protect sensitive information
- Adopt a methodology for targeting business strategically and proactively that may include filtering criteria such as:
 - Sector
 - Size of the company
 - Companies that are poised for growth or at risk
- Utilize consistent interview questions to gather information from the business that will provide a comprehensive picture of their needs
- Develop a strategy for sharing information among team members and identify potential solutions that provide a comprehensive response to the needs
- Deliver the solution or services seamlessly to the business so they experience a coordinated system of partners, rather than siloed programs and agencies



Recommendation 2: Launch Sector Partnerships in a Career Pathways System Model

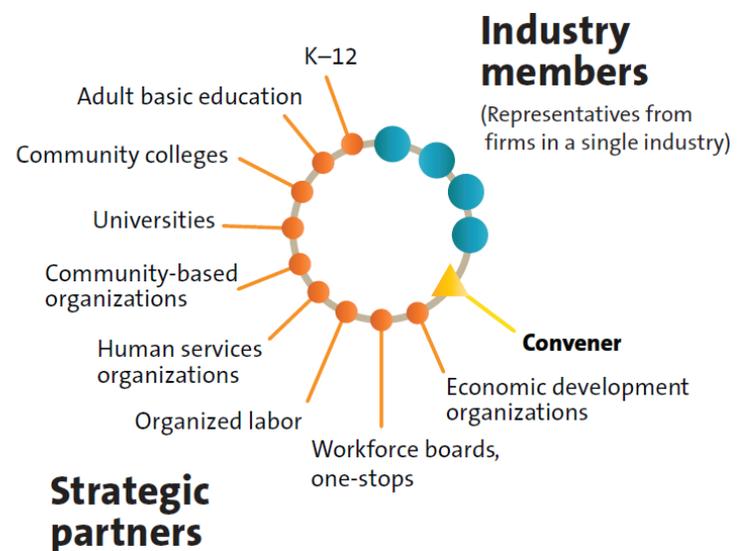
In a career pathways *system* model, individual programs and services are linked and aligned to create a full continuum of career and skill development strategies with multiple entry and exit points. Education, training, and employment services are aligned among partner entities in support of the career pathways, ultimately resulting in an effective way to address skills shortages in the area's key industries.

Sector partnerships play a vital role in the career pathways system. They provide the demand perspective to the system, identifying current and future talent needs, which should drive the resulting career pathways and supportive strategies. The National Governors Association defines sector strategies/partnerships as “Sector strategies are partnerships of employers within one industry that bring government, education, training, economic development, labor, and community organizations together to focus on the workforce needs of an industry within a regional labor market.”

The characteristics of sector partnerships include:

- **Prioritized industries** – Sector partnerships focus on *a single* industry sector. There may be multiple industry partnerships in the region, but they should each focus on one industry to make sure industry representatives have the opportunity to talk about needs relative to their industry.
- **Identify common needs/trends**
- **Businesses drive the agenda** – Staff or partners should convene the sector partnership, but business representatives should drive the agenda and lead the conversation. Staff and partners are part of the conversation as a resource for information and to follow-up on needs.
- **Respond collaboratively** – The *system* of partners will be required to address collective needs of industry. In many cases, the collective needs identified through sector partnerships will require long-term solutions or non-traditional services that include education providers and economic development. It is important that there is a collaborative infrastructure of system partners in place to respond to the industry needs identified through each sector partnership.
- **Mechanism for on-going dialogue** – Businesses needs change frequently, so sector partnerships are a good tool for on-going, consistent information about industry needs.

Figure 1. Sector Partnership System Representatives



Source: National Governors Association



CareerSource CLM currently has a sector partnerships established for the manufacturing sector and can use this as a model for launching additional sector partnerships for the Healthcare and/or Technology sectors.

Recommendation 2a: Formalize collaboration among system partners to respond to needs identified by sector partnerships

In order to respond collaboratively, the system of workforce development, education, and training partners needs to be organized for a more systemic response to the talent development needs identified by businesses in Citrus, Levy, and Marion counties. Collaboration among CareerSource CLM, other workforce partners and programs, and education and training providers in the region is already strong and provides a foundation to support successful sector partnerships. CareerSource CLM can plan a leadership role in bringing *all* partners together to leverage this collaboration for a comprehensive *system* approach to the skill needs and talent development issues identified by the sector partnerships in the region.

As sector partnerships for manufacturing, healthcare and/or technology identify collective needs for their industry, the “response mechanism” to address these needs will be the same system of partners. These “strategic partners” or “system partners” should include:

- Education (K-12, CTE, Community College, Universities)
- Human Services
- Community Based Organizations
- Workforce Development
- Economic Development
- Government
- Labor
- Industry Representatives

CareerSource CLM can convene these system partners to support the region’s sector strategies. To establish a system of partners, CareerSource CLM can:

- *Organize a Steering Committee and Define the Vision for the System* – The Steering Committee should be comprised of partners committed to the system approach. This leadership group will be responsible for establishing the system vision so it can be communicated to other partners that will be engaged.
- *Engage Other Stakeholders* – This can be done through a Strategy/Planning Sessions or a wider planning summit in the community. Once other partners are engaged, the team should identify current assets for alignment, best practices, and define roles and responsibilities.
- *Organize for Sustained Implementation* – With the collaborative system of partners established, a plan and/or structure for sustained implementation should be developed



so that system partners are continuously engaged and available to support the region's sector partnerships. This can be done through a Memorandum of Understanding among partners organizations and reinforced through regular meeting structure, Action Teams for particular sector needs/focus areas, or the like.

Once the region has identified key stakeholders and defined roles and responsibilities, the "systems" structure is applicable to all sector partnerships. Industry member representatives will be different, of course, and specific partner representatives may be required as well. A health care sector partnership, for example, may need a different subject matter expert from workforce or education to participate in system discussions; however, the same institutions will likely need to be involved.

Regular convenings of the system partners can be held monthly (at least initially) to gain and sustain momentum. Once established, the system partners should focus on:

- Identifying opportunities for alignment, recognize gaps, and identify resources to support the system partners' activities; and
- Once collective sector needs are identified by sector partnerships, identifying solutions – both short-term and long-term – to address industry needs.

Recommendation 2b: Establish sector partnerships based on key sectors in the region

The CareerSource CLM strategic plan identifies Manufacturing, Healthcare, and Transportation and Warehousing as established target industries and Technology as an aspirational industry for the region. With this information, CareerSource CLM can expand its sector strategies to support these industry sectors. In launching new sector partnerships or strengthening existing partnerships, CareerSource CLM should consider the following steps:

1. *Determine which sector(s) to focus on for the region's sector partnerships* – While CareerSource CLM's strategic plan has identified target industries, the Board and staff will need to determine a roll-out plan for establishing new or expanded sector partnerships in the region. This plan should include recommendations for which sector partnership(s) are convened first, the timeline for roll-out, and corresponding staffing considerations (see Recommendation 3).
2. *Identify a business representative(s) that will serve as a champion for the sector partnership* – The champion should be an individual or an individual from a business that is highly respected within the sector in the region and who is committed to talent development. The champion will be a key player in bringing industry peers to the table and generating buy-in in the early convenings of the sector partnership.
3. *Engage high-demand employers* – The business champion can help to engage peers from within his/her industry in the sector partnership. System partners should also help to engage employers they work with within the industry sector to build out the partnership.



4. *Hold planning sessions and identify occupational/skill needs* – With employers engaged, CareerSource CLM can convene the sector partnership and system partners for initial planning sessions to identify and prioritize occupational/skill needs of the industry. These planning sessions should be led by the business champion and other business leaders in the partnership and supported by the system partners. The outcome of these planning sessions will be the initial areas of focus for the sector partnership.
5. *Develop an Action Plan around sector partners' priorities* – After listening to the priorities and needs of the industry partners, system partners can collaboratively develop an Action Plan to address these needs that leverages collective resources, programming, and services. The Action Plan should not only include strategies, but also resources that will be needed and an implementation structure such as Work Teams to deliver on the plan.



RECOMMENDATION 3: Target CareerSource CLM resources to support the Board's sector strategies

Serving as the convener of sector strategies in Citrus, Levy, and Marion counties will require dedicated resources – both human resources and financial resources. CareerSource CLM should establish an internal infrastructure to support the sector strategies that considers:

- *Dedicating staff to key industry sectors* – Among CareerSource CLM's business-facing staff, personnel can be dedicated to key industry sectors based on their expertise, interest, and priorities of the organization. Similar to an "Account Executive" approach, business services staff would focus time and attention on a specific industry sector. This enables staff to spend time strategically and ensures that each sector strategy has committed support. Staff will have the opportunity to become subject matter experts in their respective sector – both in regard to the latest industry trends and workforce needs as well as in regard to the resources that may available to support unique sectors.

This model does not prohibit CareerSource CLM to respond to the needs of all industry sectors, but encourages proactive outreach and services to be targeted toward key sectors.

- *Targeting investments toward key sectors and occupations/skills within those sectors* – In times of dwindling resources, CareerSource CLM's training investments can be targeted proactively to high-priority sectors. Through the sector partnerships and Business Services Team, CareerSource CLM will have significant demand intelligence that can be utilized in conjunction with targeted training investments to close skill gaps and talent needs in key sectors. The CareerSource CLM Board and staff should conduct an analysis of training investments to determine alignment with priority sectors and the appropriate portion of training investments that should be targeted to these key sectors.



RECOMMENDATION 4: Begin regional planning efforts for WIOA implementation

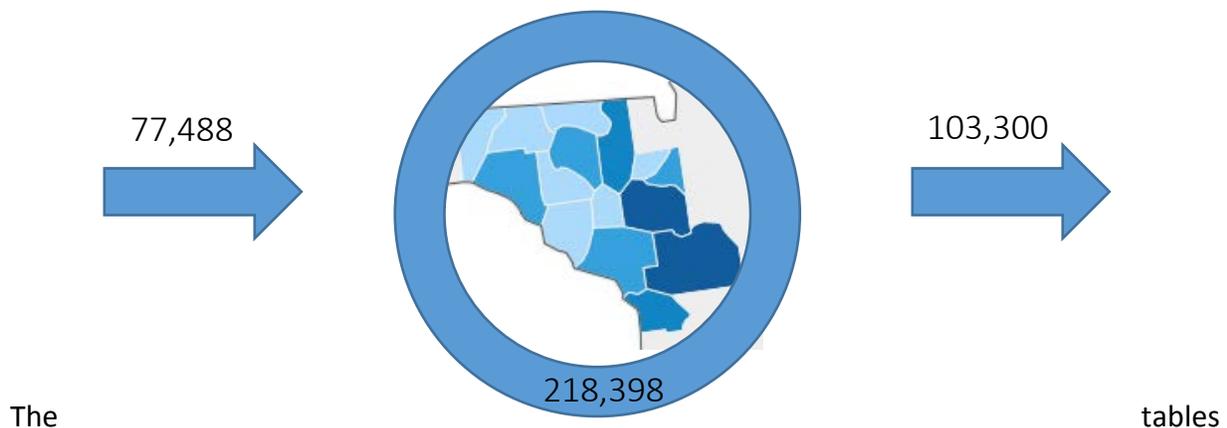
To prepare for the regional planning that is outlined in WIOA, CareerSource CLM has examined and engaged in discussions with surrounding regions to determine which group of local areas is most appropriate for regional planning and provides the greatest opportunities for collaboration and strategic initiatives.

The region recommended includes four local areas:

- *CareerSource Citrus Levy Marion (Region 10)*: Citrus, Levy, and Marion Counties
- *CareerSource North Florida (Region 6)*: Hamilton, Jefferson, Lafayette, Madison, Suwannee, and Taylor Counties
- *CareerSource North Central Florida (Region 9)*: Alachua and Bradford Counties
- *CareerSource Florida Crown (Region 7)*: Columbia, Dixie, Gilchrist, and Union Counties

These four areas have existing relationships that can be leveraged for further collaboration. The neighboring areas have worked together to serve businesses that cross regional lines as well as on several special projects, including federal grants. Each of these local areas also have counties that are part of the North Florida Economic Development Partnership. Membership in this partnership provides a basis for current collaboration as well as a common vision for economic development priorities, supporting historically strong industries, while also embracing new areas for growth and innovation. Citrus Levy Marion and North Florida also already have an administrative relationship, as CLM provides cash management and human resource functions for the North Florida area.

The region also shares a strong, mobile workforce, and commuting patterns show that more workers are commuting within this region than are leaving it or coming in. Nearly 75% of workers who are employed in this region also live in the region, and nearly 70% of residents who live in this region also work in the region. More than 218,000 workers both live and work within these four areas, while only 77,488 workers commute in each day, and 103,300 commute out.





below show the breakdown of where workers live and where residents work by local area. The highest percentage of workers coming from outside the region is just 35.7% in the Citrus, Levy, Marion area, while the highest percentage of residents leaving the region for work is just 30.2% in the North Florida area. This further shows that the majority of worker and residents in this region are also participating in the workforce in this region.

Where Residents Work

	Citrus, Levy, Marion	North Florida	North Central Florida	Florida Crown
<i>Live and work in the same local area</i>	57.2%	51.5%	34.8%	69.5%
<i>Work in another local area in this region</i>	7.1%	14.3%	29.8%	6.2%
<i>Work outside of the region</i>	35.7%	34.2%	35.4%	24.2%

Where Workers Live

	Citrus, Levy, Marion	North Florida	North Central Florida	Florida Crown
<i>Live and work in the same local area</i>	66.1%	60.8%	55.8%	59.4%
<i>Live in another local area in this region</i>	5.5%	8.9%	21.4%	17.0%
<i>Live outside of the region</i>	28.4%	30.2%	22.8%	23.5%

In addition to a shared workforce, the region shares some commonalities in strong, targeted, and growing industries. The Healthcare industry is a top employer and priority in all four areas, employing more than 53,000 workers, nearly 15% of the regional workforce.

	2014 Jobs	% of Local Area Workforce
<i>Citrus, Levy, Marion</i>	22,937	15.5%
<i>North Florida</i>	3,347	10.0%
<i>North Central Florida</i>	22,775	14.9%
<i>Florida Crown</i>	4,079	11.8%

While not the largest industry in all four local areas, Manufacturing provides strong wealth generating production within the region and offers opportunities for supply chain coordination. Manufacturing is in the top five industries for North Florida and the Florida Crown, and is still strong and growing in Citrus, Levy, and Marion Counties and North Central Florida.

	2014 Jobs	% of Local Area Workforce
<i>Citrus, Levy, Marion</i>	8,293	5.6%
<i>North Florida</i>	4,462	13.3%
<i>North Central Florida</i>	4,587	3.3%
<i>Florida Crown</i>	2,486	7.2%



Other industries common among the top industries in each area include Government, Construction, Retail Trade, Administrative and Support Services, and Accommodation and Food Services. These common industry needs offer opportunities for further collaboration on training programs and other business services solutions.