



TIP Strategies

Tom Stellman, President & CEO

Regional Context

Future of the Workforce

August 22, 2012

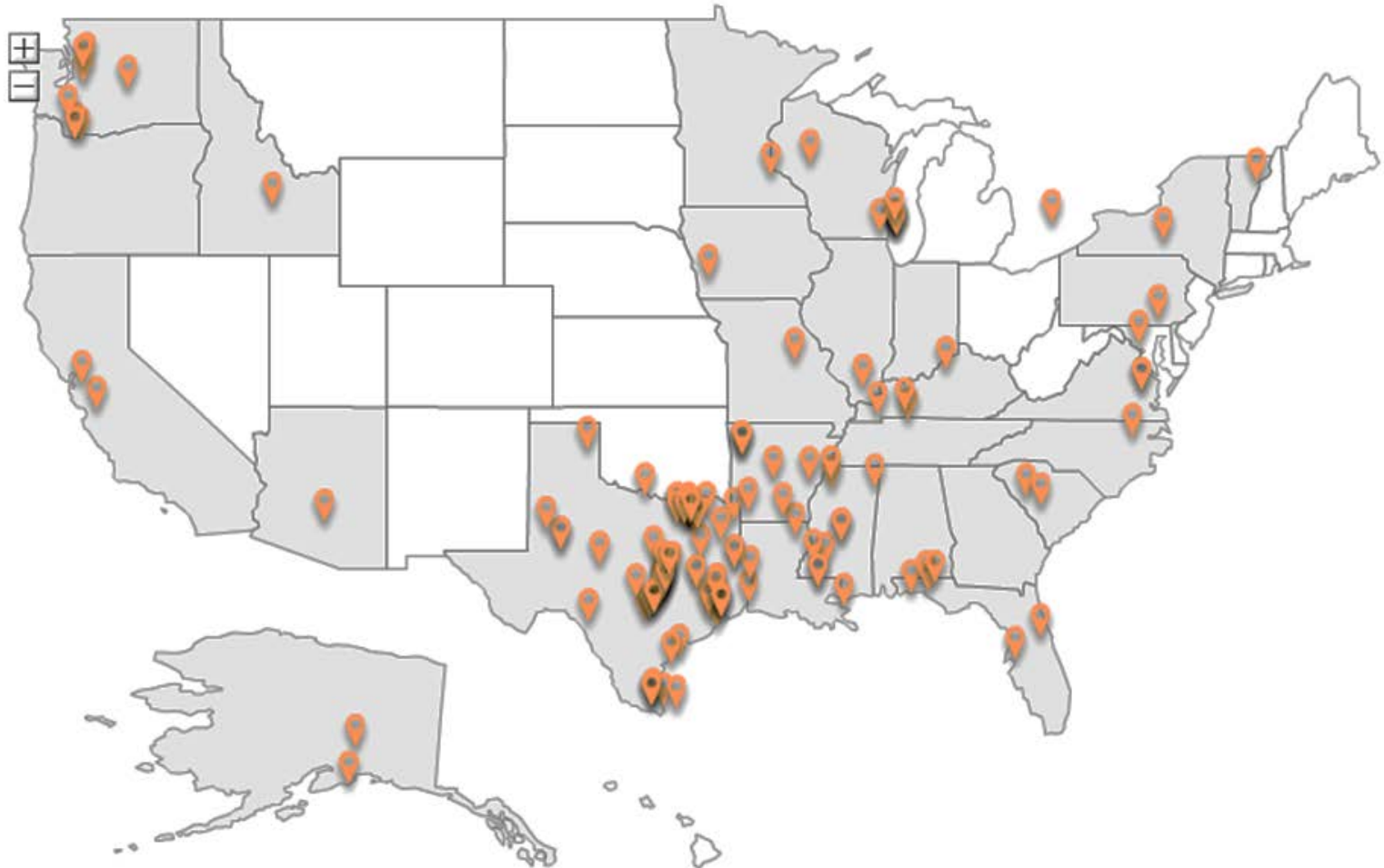
About us



- Founded in 1995
- Based in Austin, TX
- Expertise: economic & workforce development strategic planning

Our Work

We have 17 years of experience in over 100 different communities.



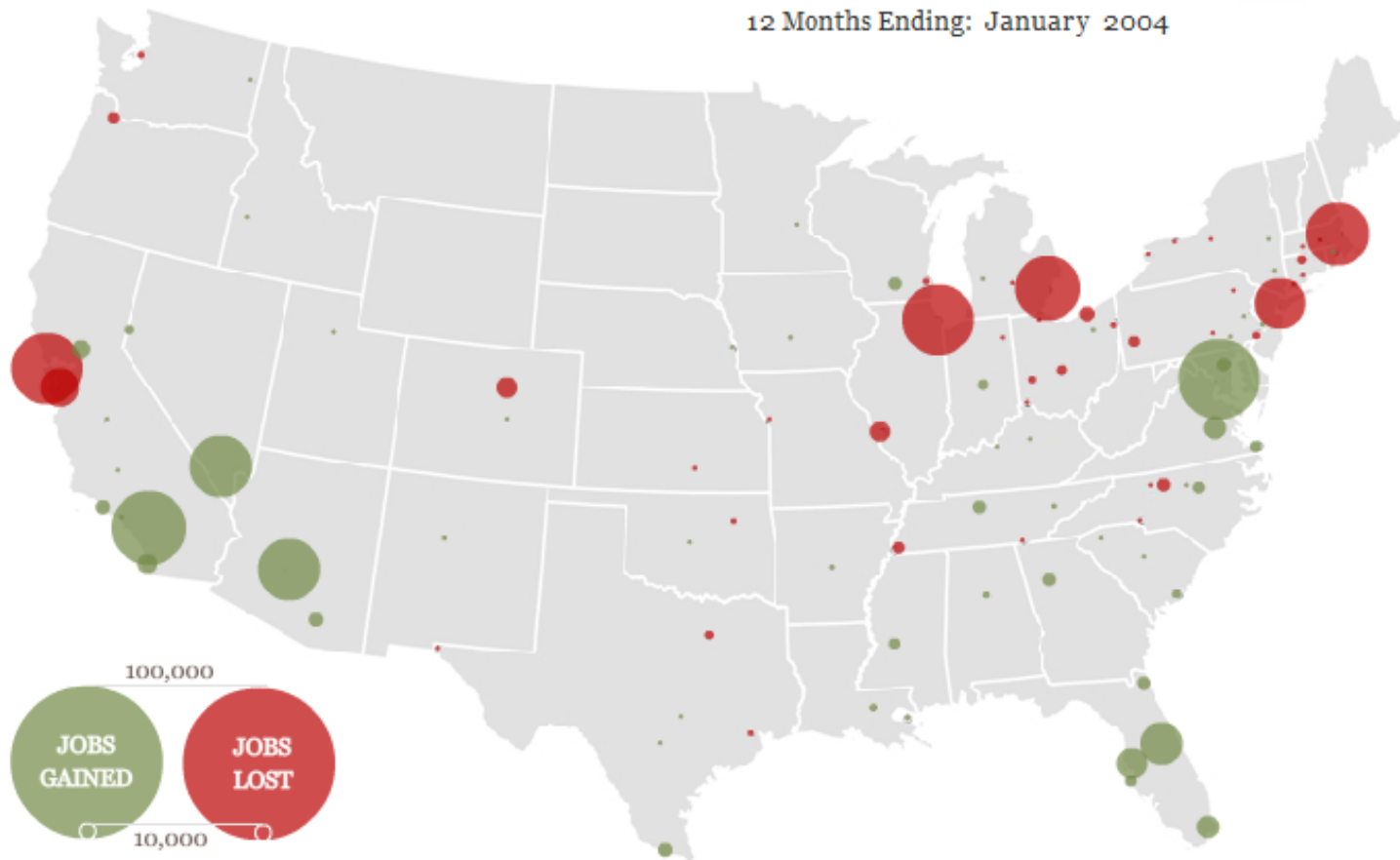
CURRENT PROJECTS

- **Puget Sound Regional Commission** – CEDS (Seattle, WA region)
- **Association of Central Oklahoma Governments** - CEDS (Oklahoma City, OK region)
- **Clarksville – Montgomery County EDC** – Labor Force Analysis (Clarksville, TN – Hopkinsville, KY area)
- **East Alabama Regional Planning and Development Commission** -Workforce/Economic Diversification Strategy (Anniston, AL)
- **Fort Collins, CO** – Economic Health Strategy
- **Green River Area Development District** – Regional Workforce and Economic Development Strategy (Owensboro, KY region)
- **Hispanic Scholarship Fund** – Market and Impact Analysis (National and State of Georgia)
- **Redmond, WA** – Economic Development Plan

The Geography of Jobs



Net Job Gains / Losses by Metropolitan Statistical Area,
12 Months Ending: January 2004

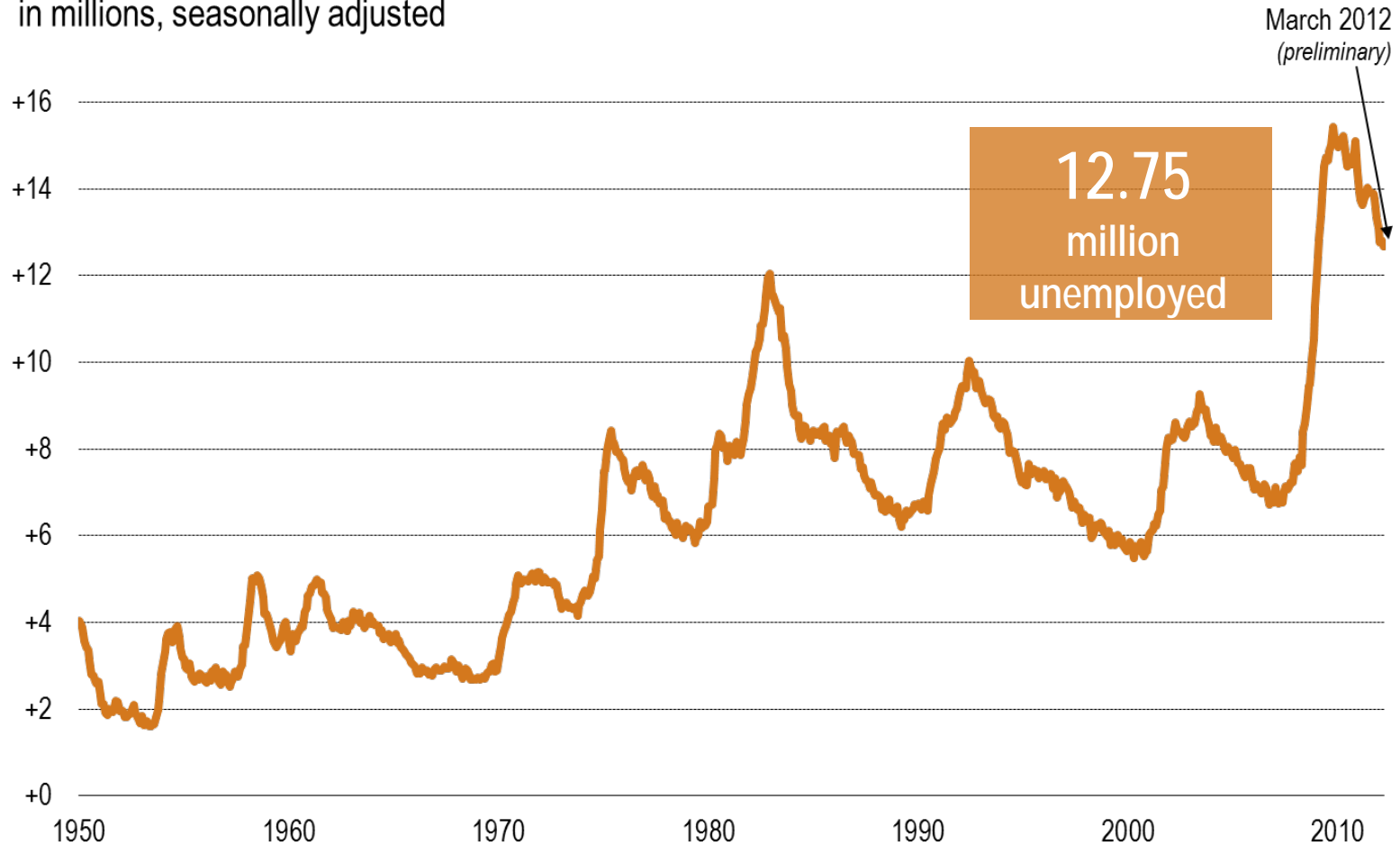


Note: Top 100 Metropolitan Statistical Areas in the contiguous United States based on number of jobs as of December 2008

Source: BLS and state labor agencies (via Moody's Analytics), TIP Strategies

Total unemployed in the US

TOTAL UNEMPLOYED, 16 YEARS AND OVER
in millions, seasonally adjusted

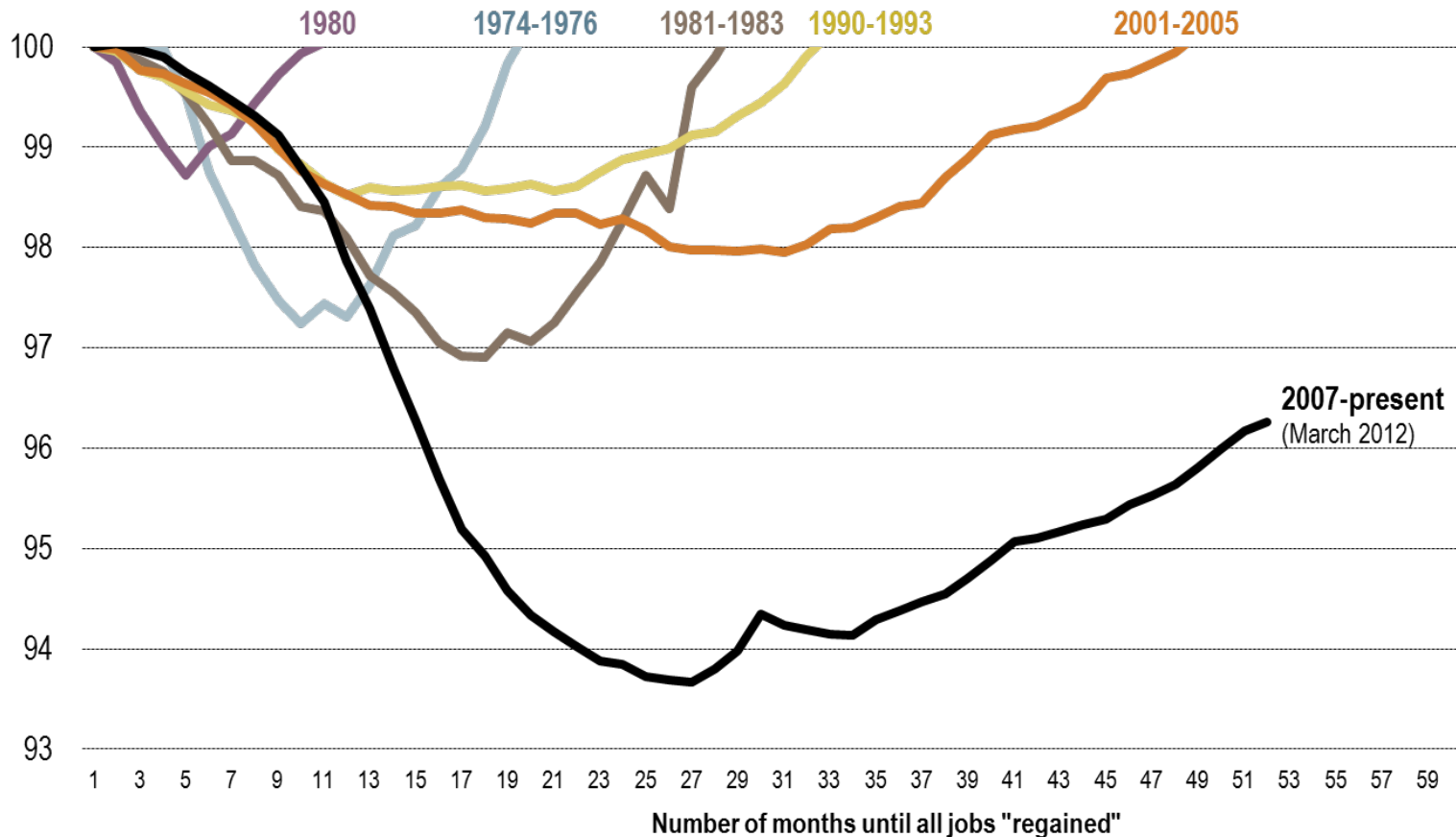


Source: U.S. Bureau of Labor Statistics (Current Population Survey)

Recessions compared

RECESSIONARY EMPLOYMENT TRENDS

Peak employment = 100



Sources: U.S. Bureau of Labor Statistics, Current Employment Statistics (total nonfarm employment, seasonally adjusted); NBER (recession dates); New York Times (format)

“As many as 600,000 jobs are going unfilled ... at the same time the national education curriculum is not producing workers with the basic skills manufacturers need.”

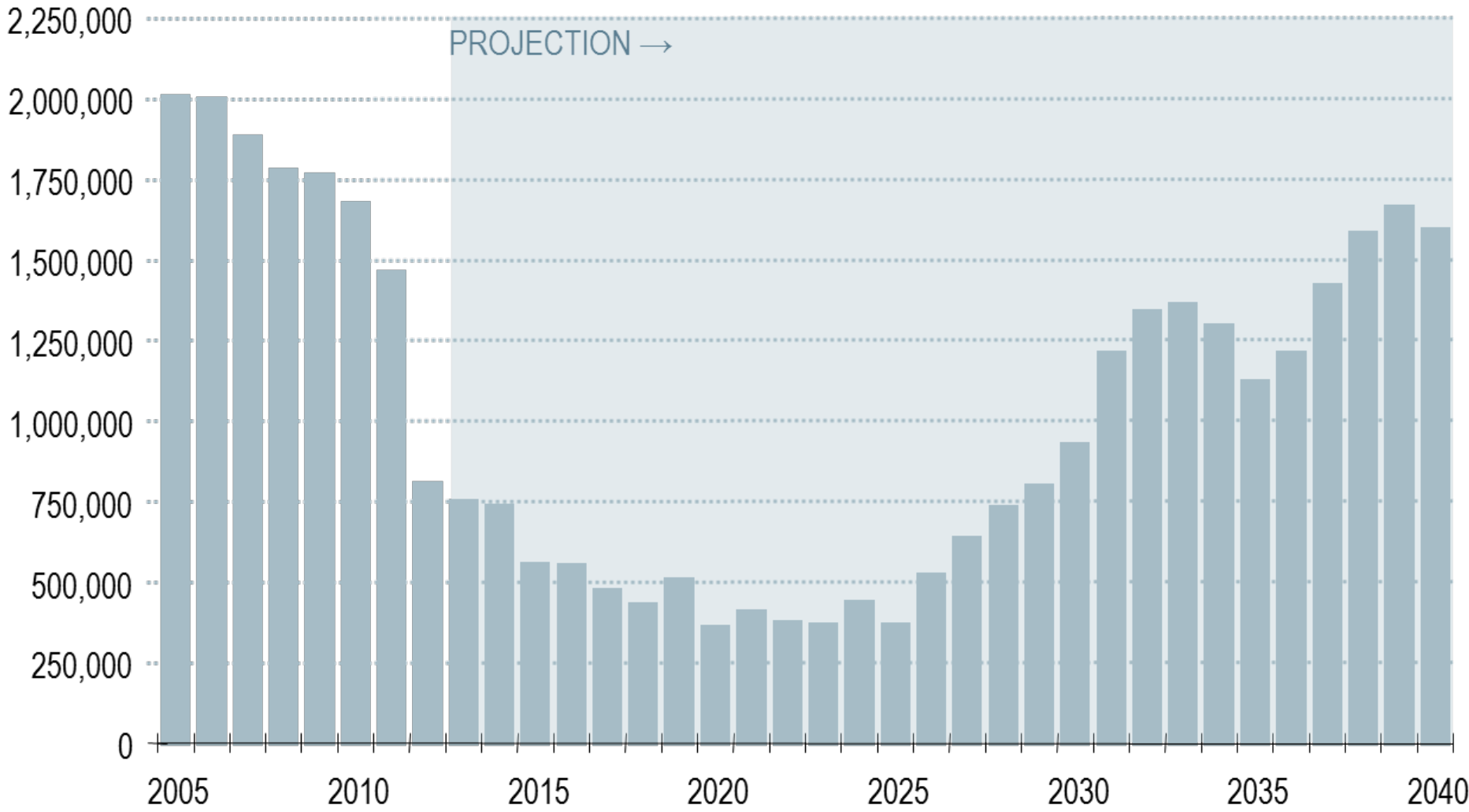
--Boiling point? The skills gap in U.S. manufacturing, a survey of 1,123 manufacturing executives conducted by Deloitte and The Manufacturing Institute, October 2011



DEMOGRAPHICS

GROWTH OF THE WORKING AGE POPULATION

Projected net annual change for the US population age 18-64



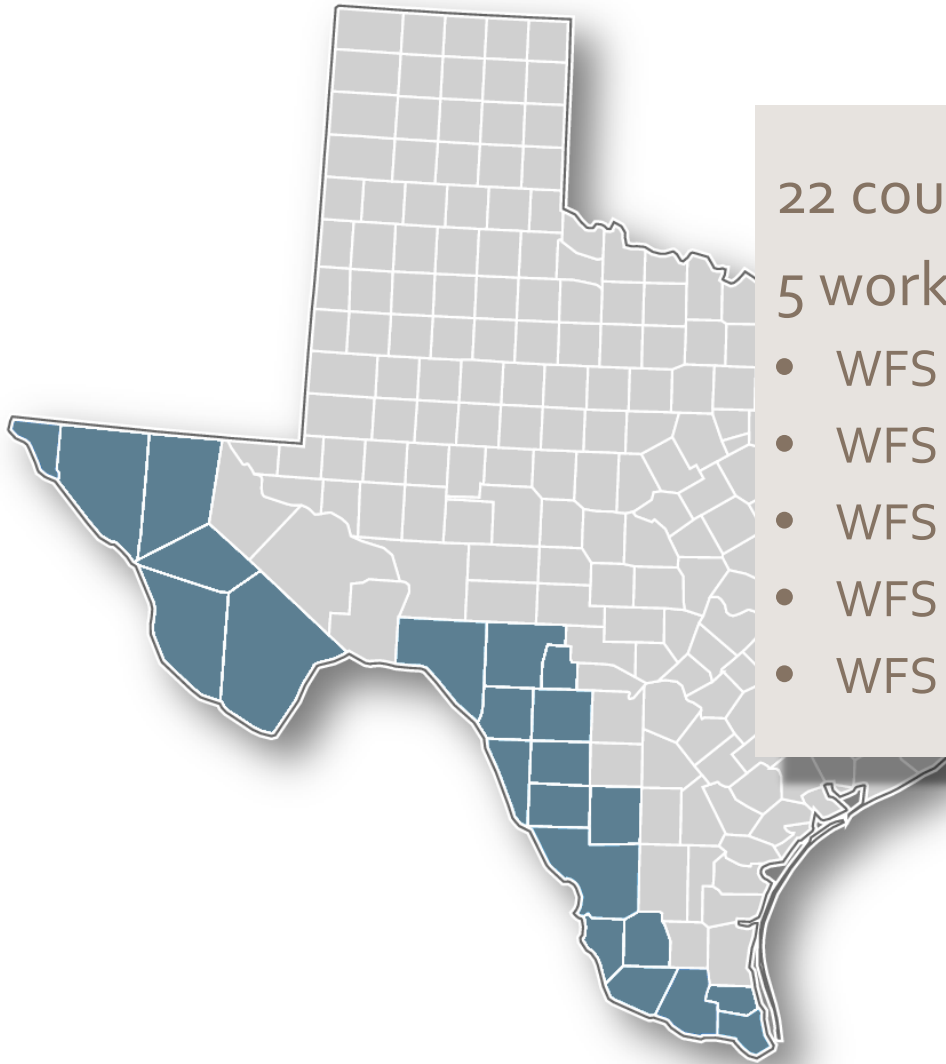
Sources: TIP Strategies; U.S. Census Bureau

“In 2011, the jobless rate among post-2001 veterans averaged 12.1 %... With more soldiers coming home this year, and the Pentagon preparing to thin out the ranks by 2017, the problem threatens to get even worse.”

[-Forbes, June 12, 2012](#)



Border Workforce Alliance (BWA)



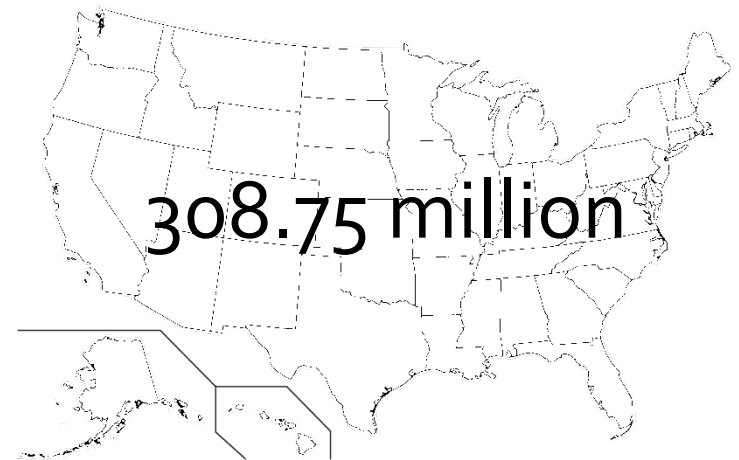
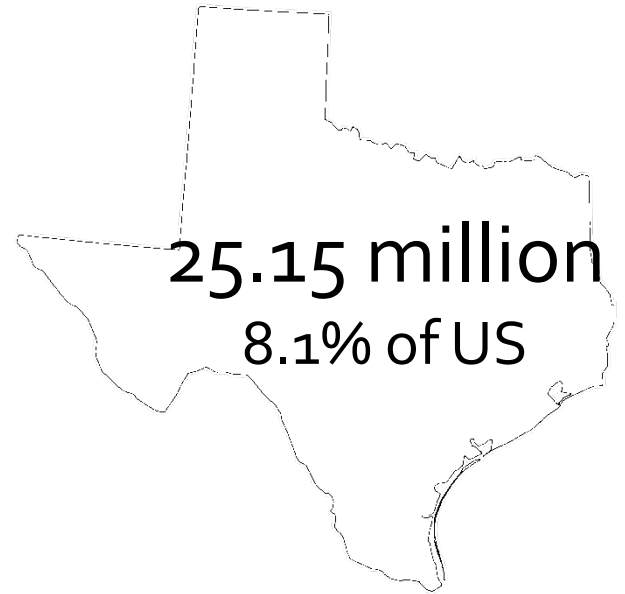
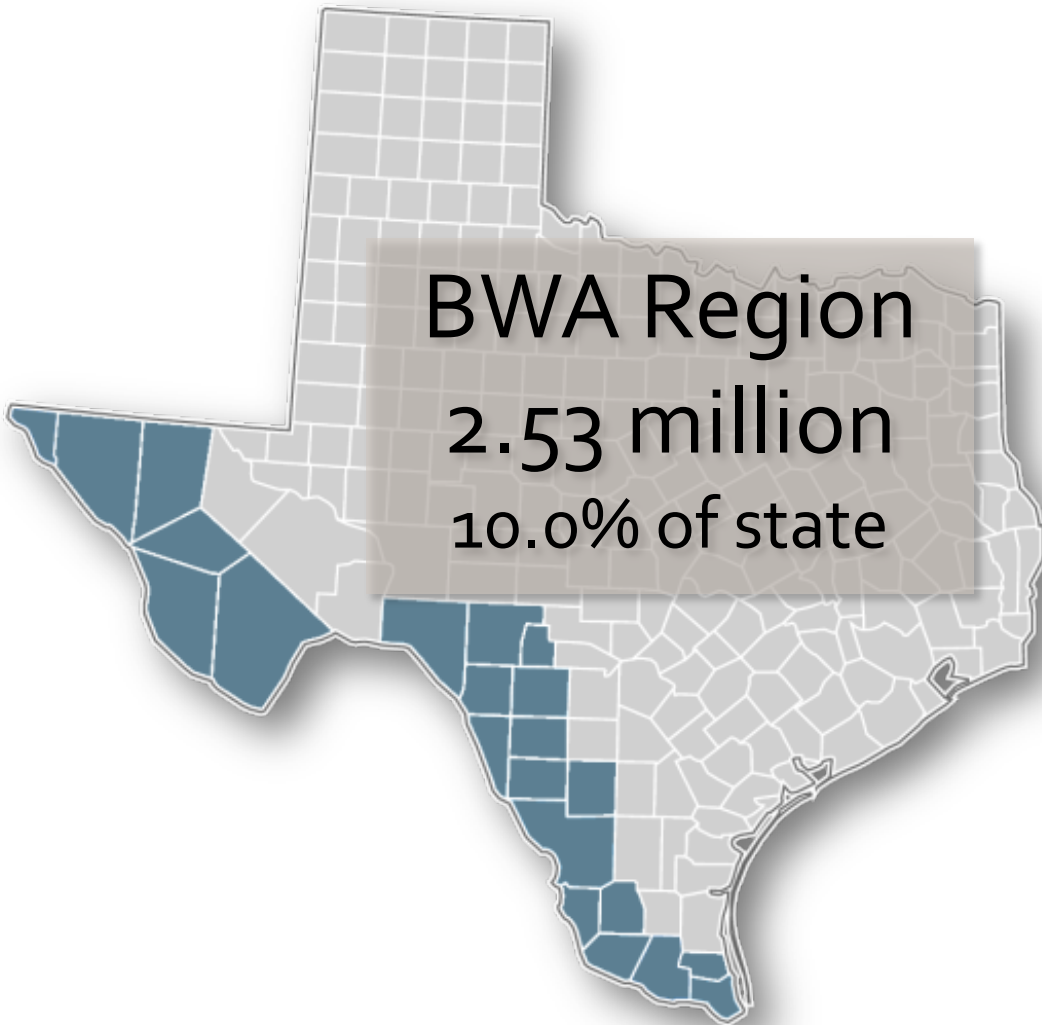
22 counties

5 workforce boards:

- WFS Cameron
- WFS Lower Rio Grande Valley
- WFS of South Texas
- WFS Middle Rio Grande
- WFS Upper Rio Grande

Population, 2010

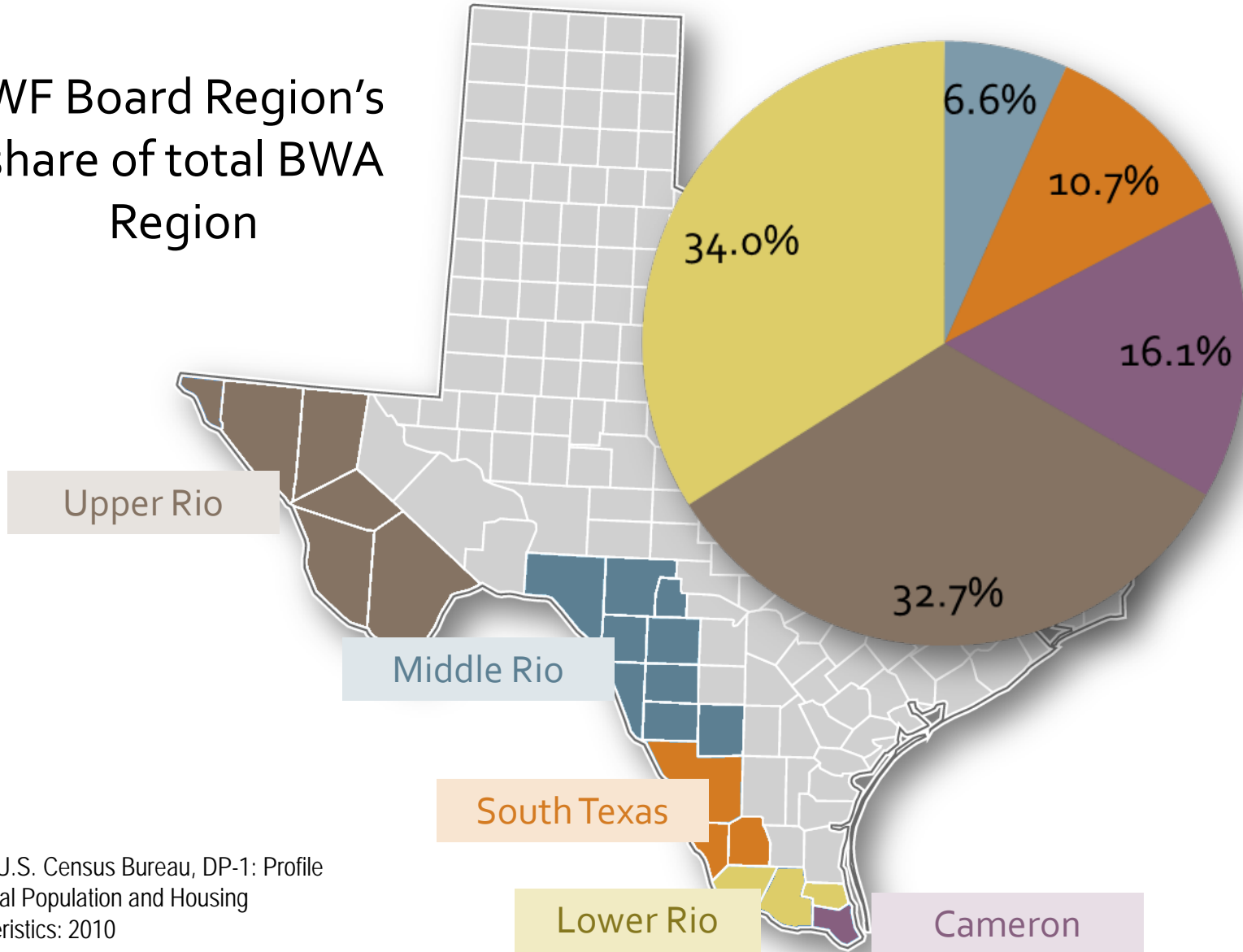
Total population in millions



Population, 2010

WFB region as share of BWA Region

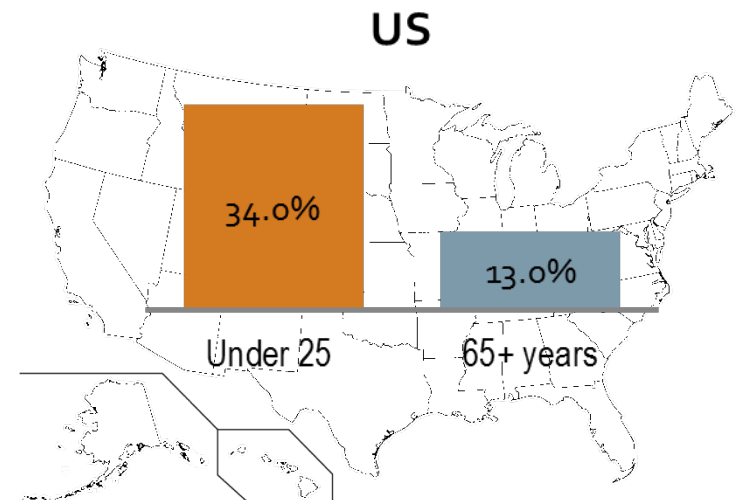
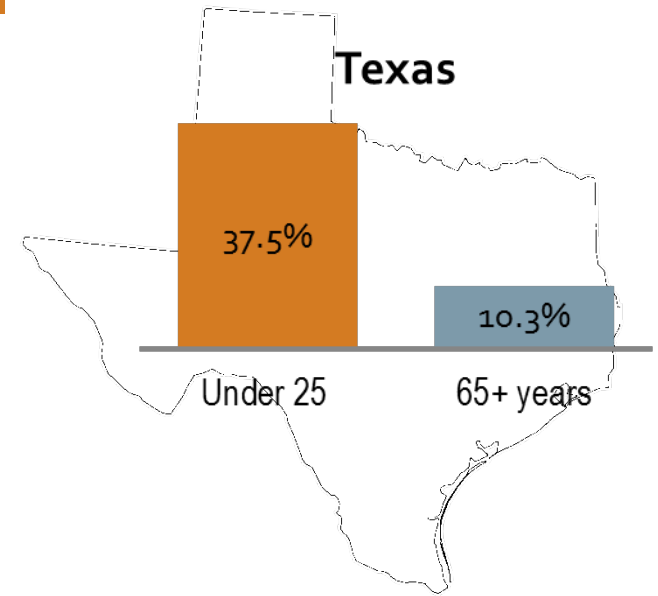
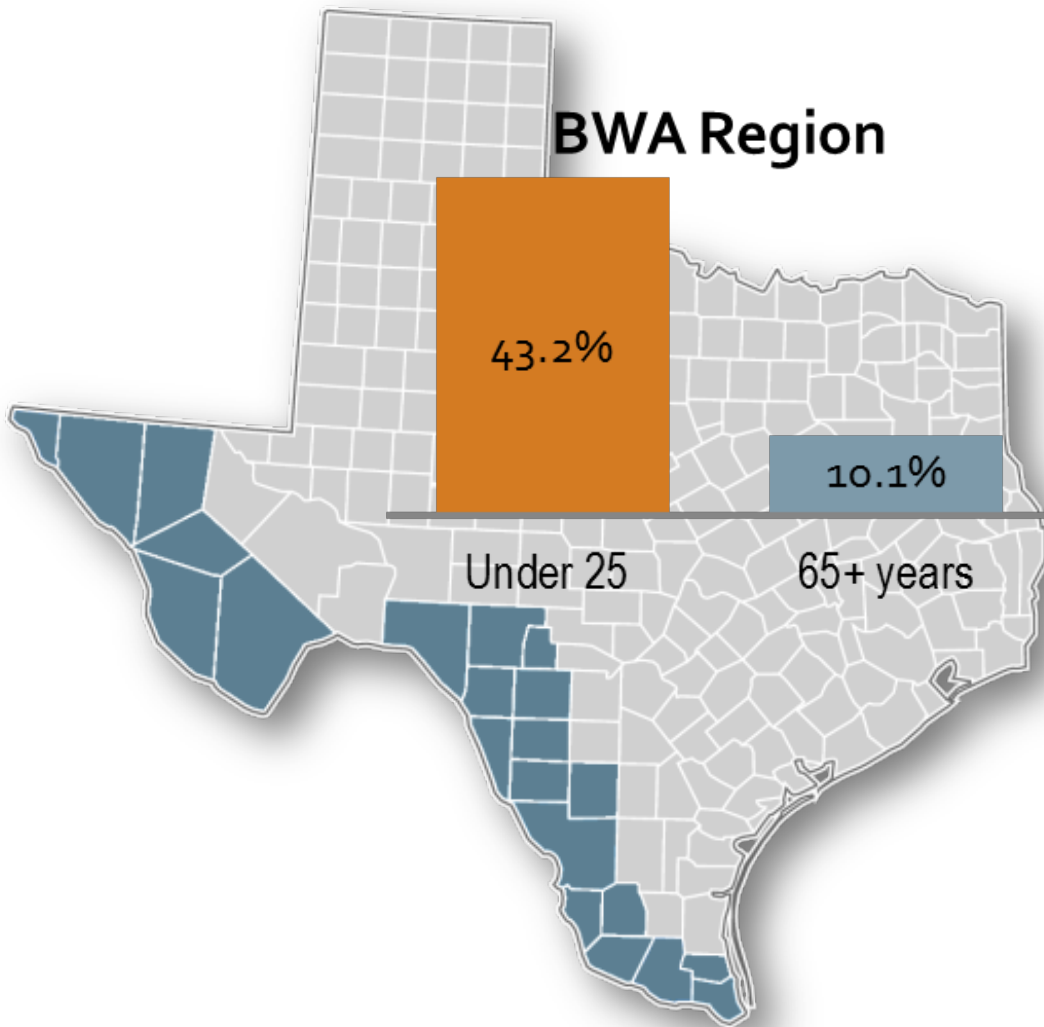
WF Board Region's
share of total BWA
Region



Source: U.S. Census Bureau, DP-1: Profile of General Population and Housing Characteristics: 2010

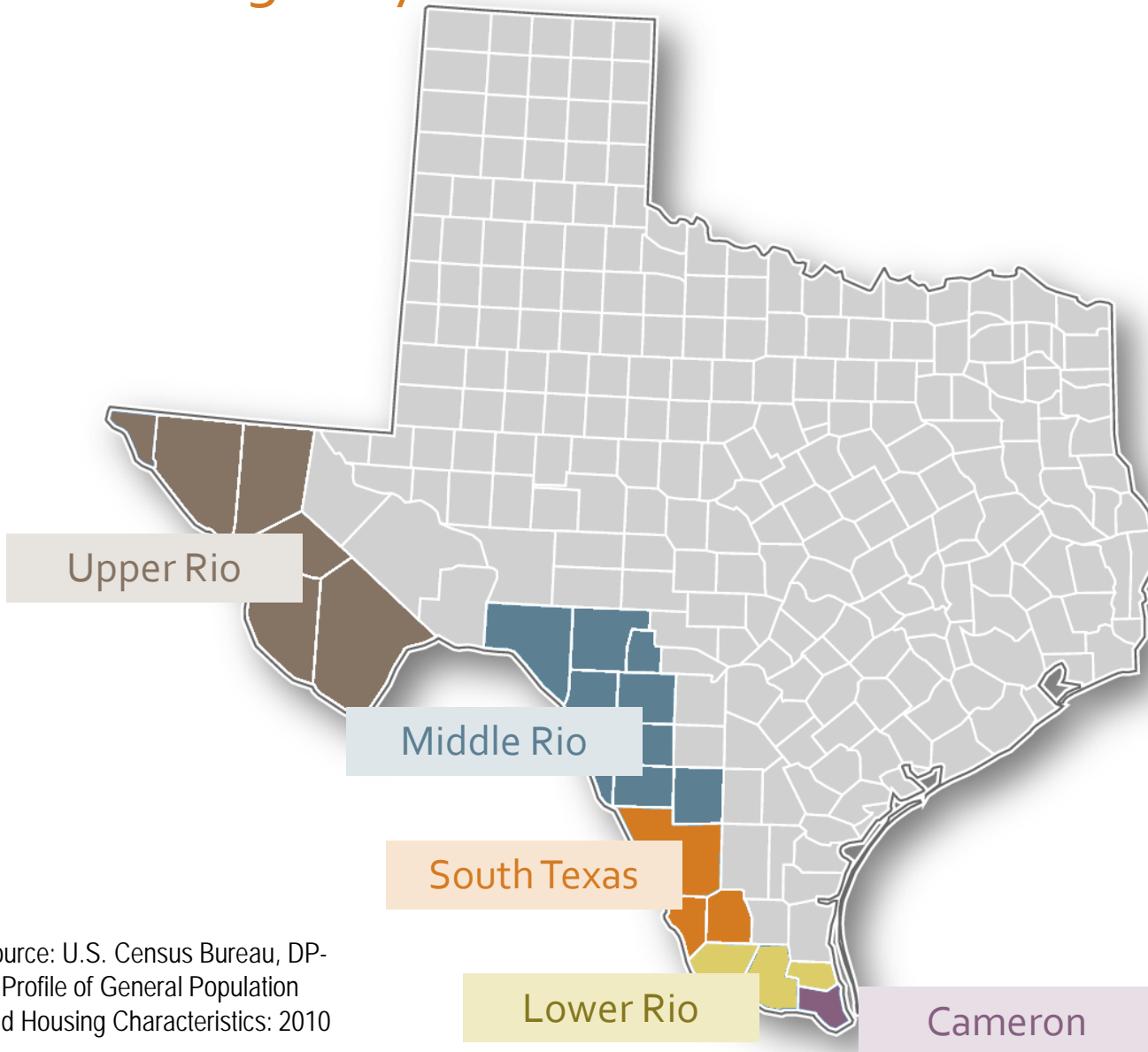
Age structure, 2010

Selected age groups as share of total



Age structure, 2010

Median age in years

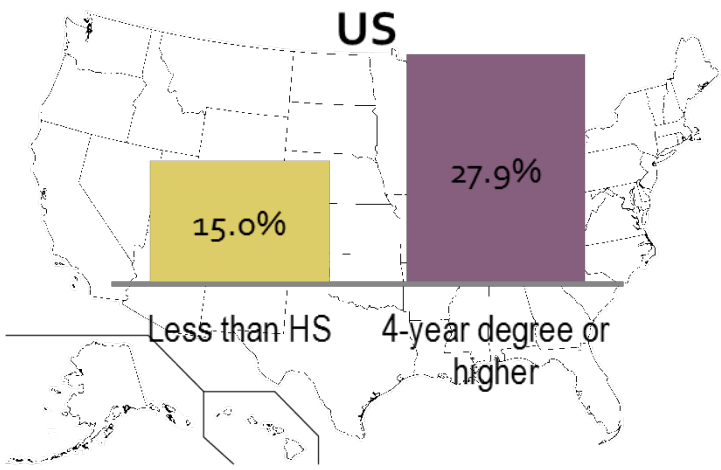
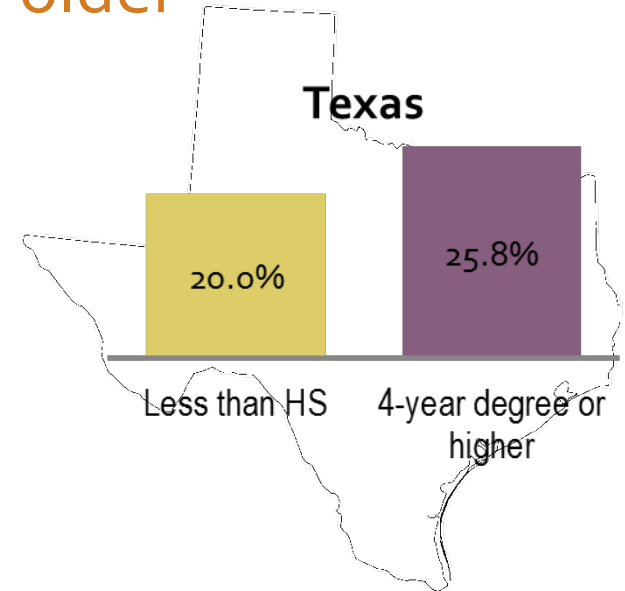
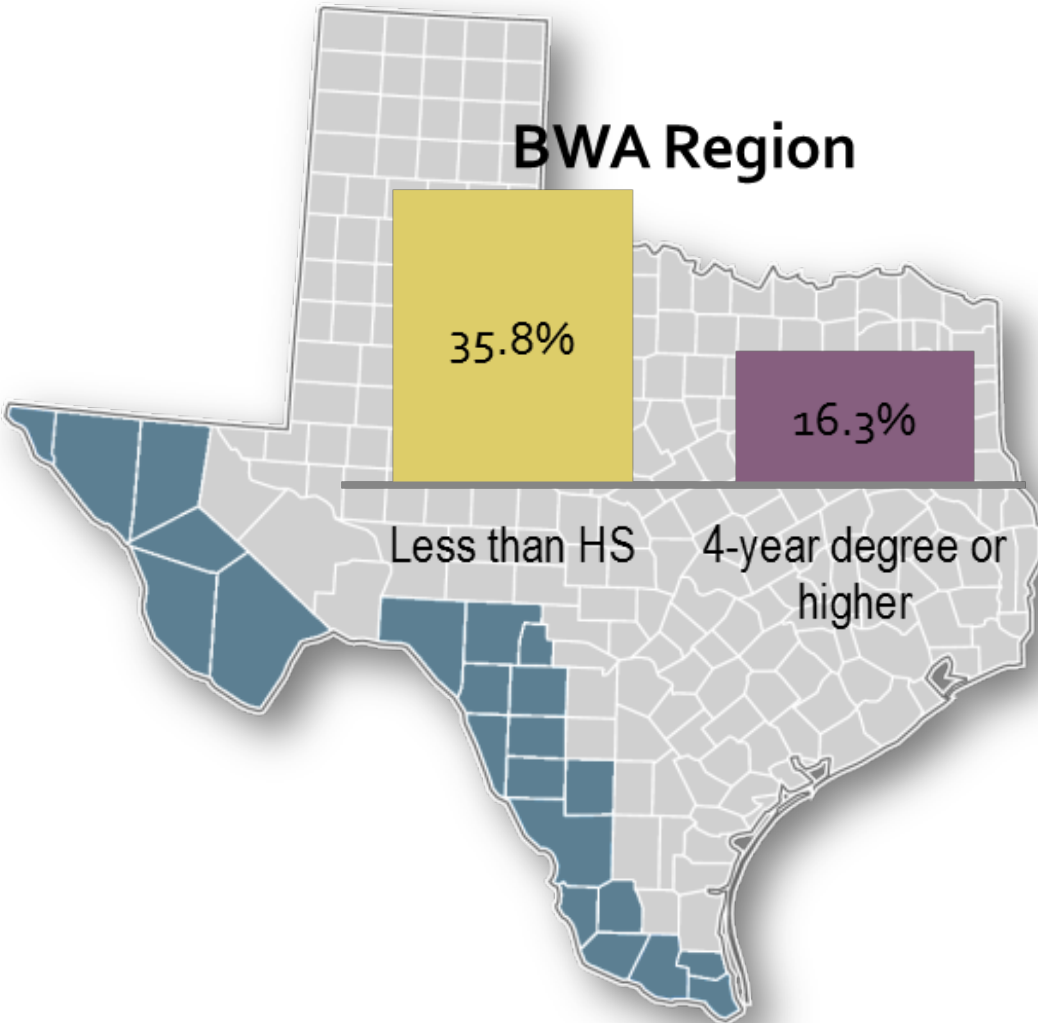


Median age (in years)	
Webb	27.8
Hidalgo	28.3
Zapata	28.3
Starr	29.0
La Salle	30.0
Maverick	30.0
Cameron	30.6
Zavala	30.8
El Paso	31.3
Willacy	32.1
Val Verde	32.3
Texas	33.6
Uvalde	35.3
Jim Hogg	35.6
Dimmit	35.7
Hudspeth	36.5
US	37.2
Culberson	38.0
Presidio	38.5
Brewster	41.5
Kinney	45.3
Edwards	47.2
Real	50.5
Jeff Davis	52.0

Source: U.S. Census Bureau, DP-1: Profile of General Population and Housing Characteristics: 2010

Educational attainment

Share of the population 25 years and older

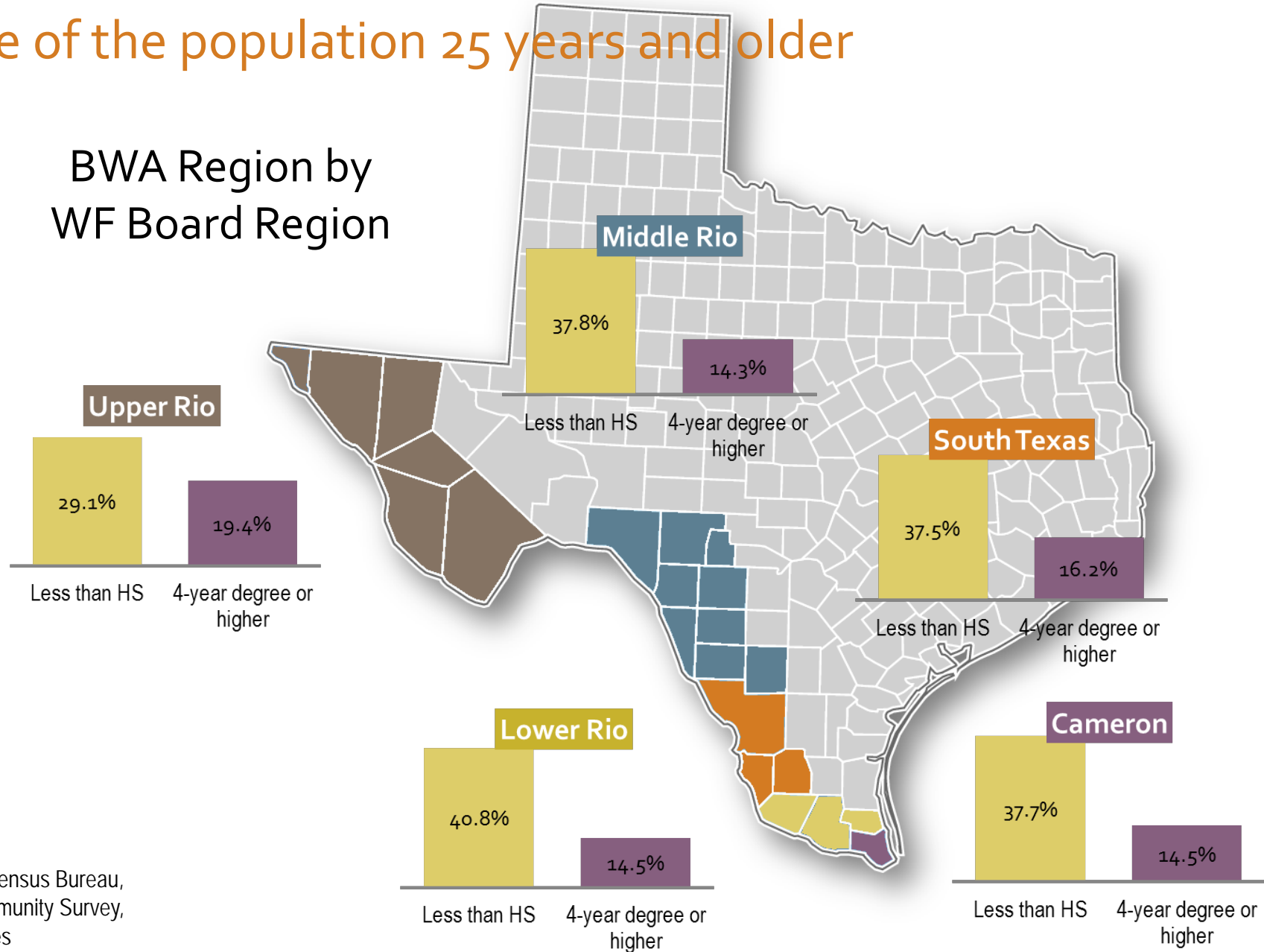


Source: U.S. Census Bureau, American Community Survey, 5-year estimates

Educational attainment

Share of the population 25 years and older

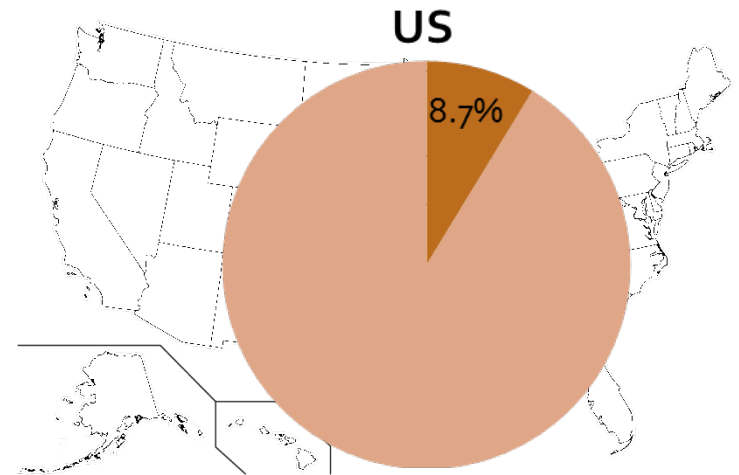
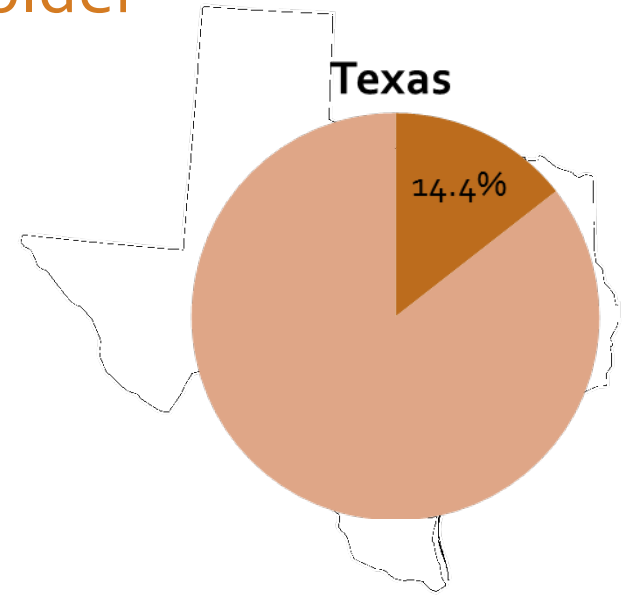
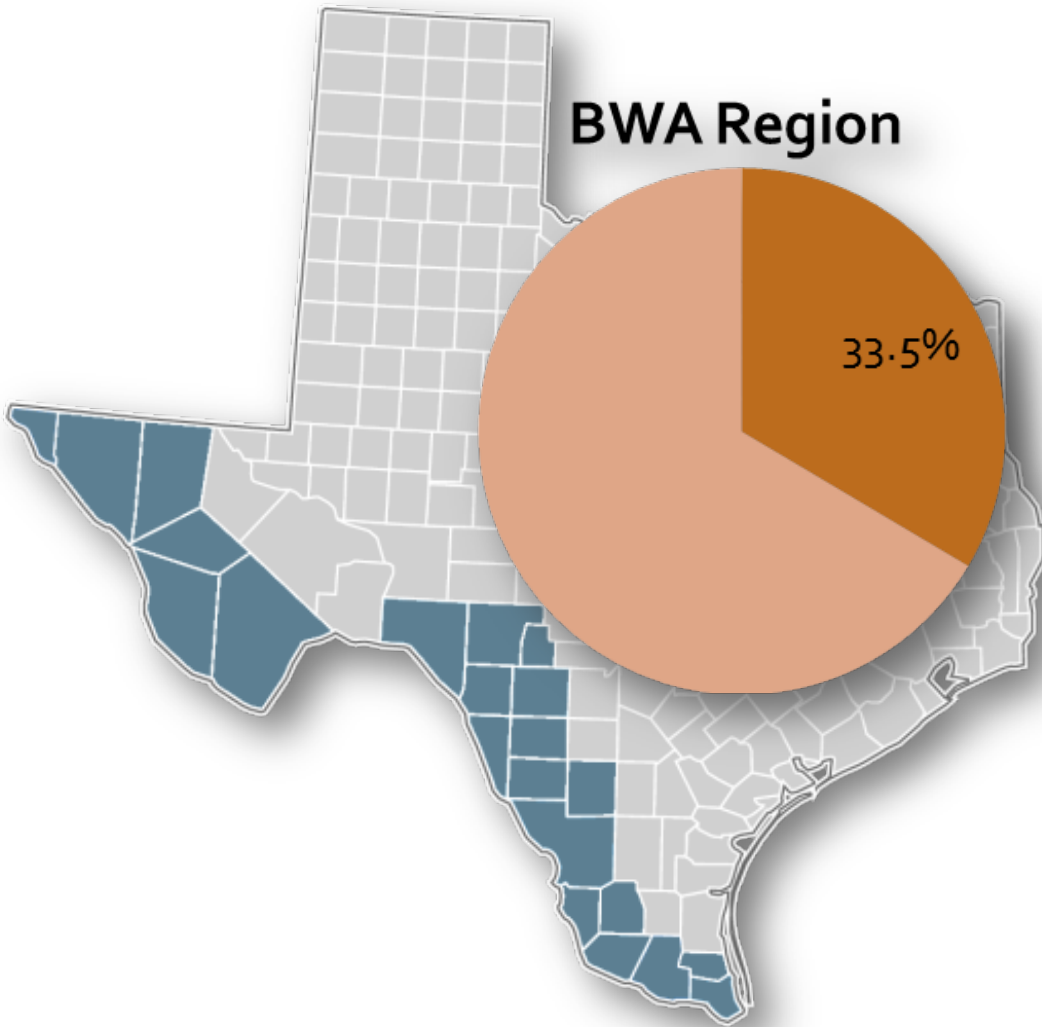
BWA Region by
WF Board Region



Source: U.S. Census Bureau,
American Community Survey,
5-year estimates

Speaks English less than "very well"

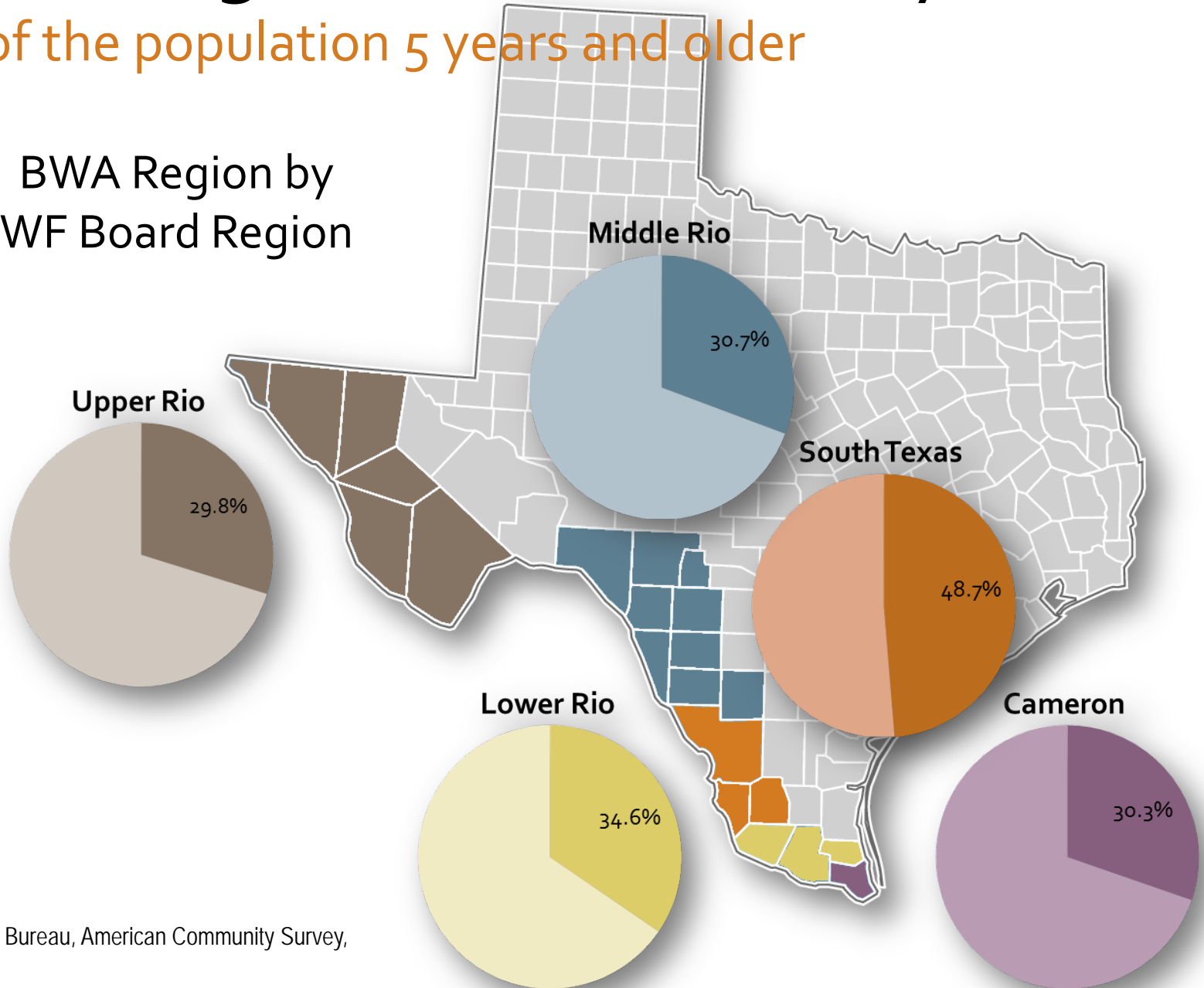
Share of the population 5 years and older



Speaks English less than "very well"

Share of the population 5 years and older

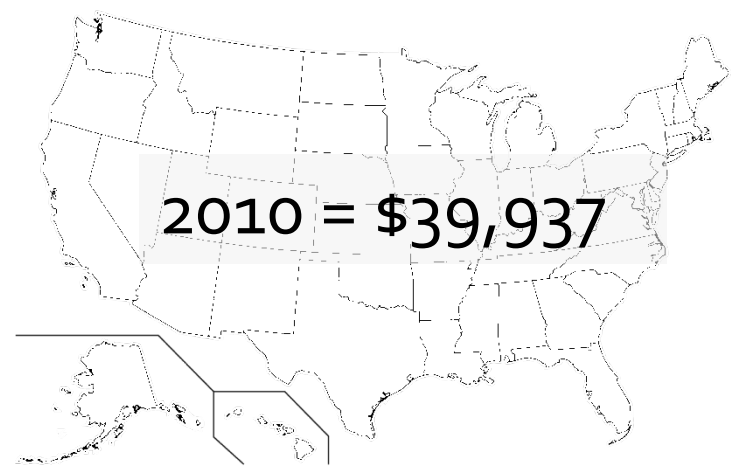
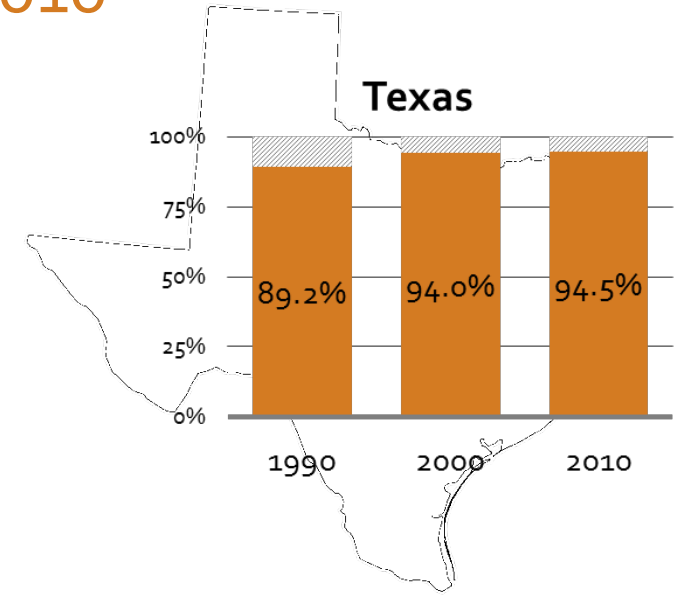
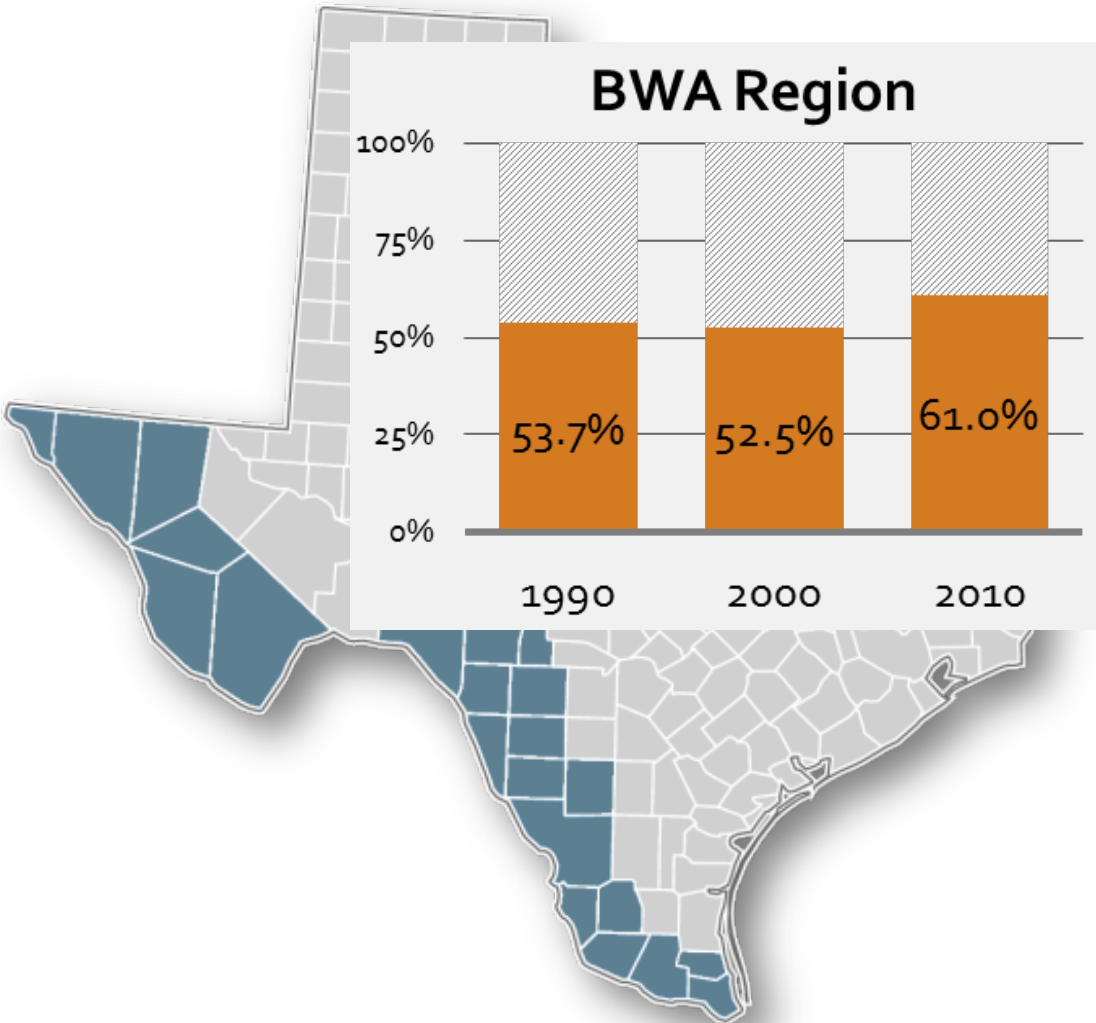
BWA Region by
WF Board Region



Source: U.S. Census Bureau, American Community Survey,
5-year estimates

Per capita personal income

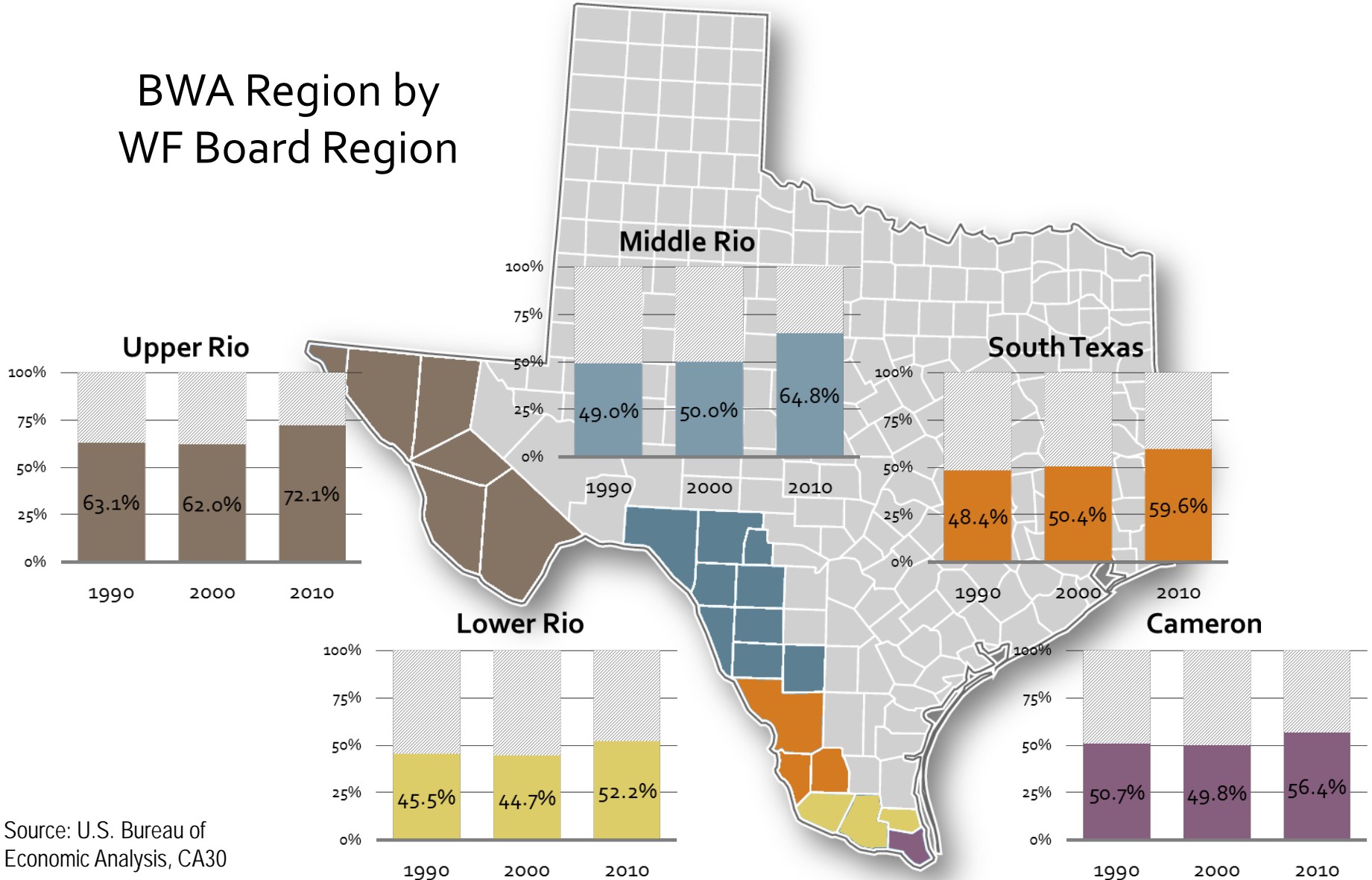
As a share of US in 1990, 2000, and 2010



Per capital personal income

As a share of US in 1990, 2000, and 2010

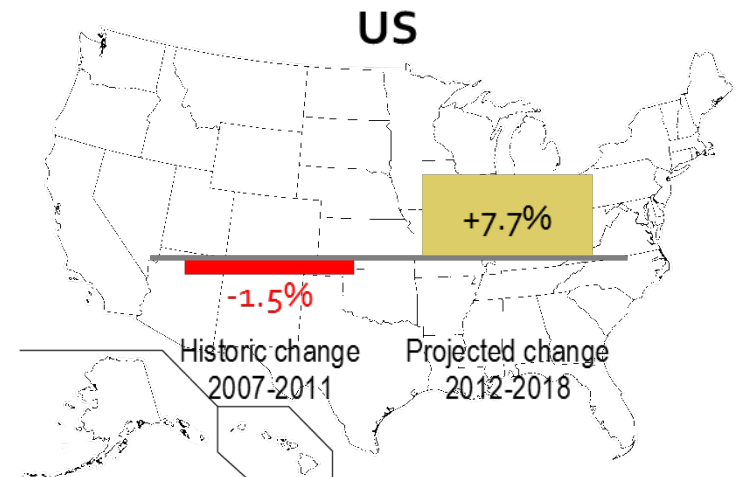
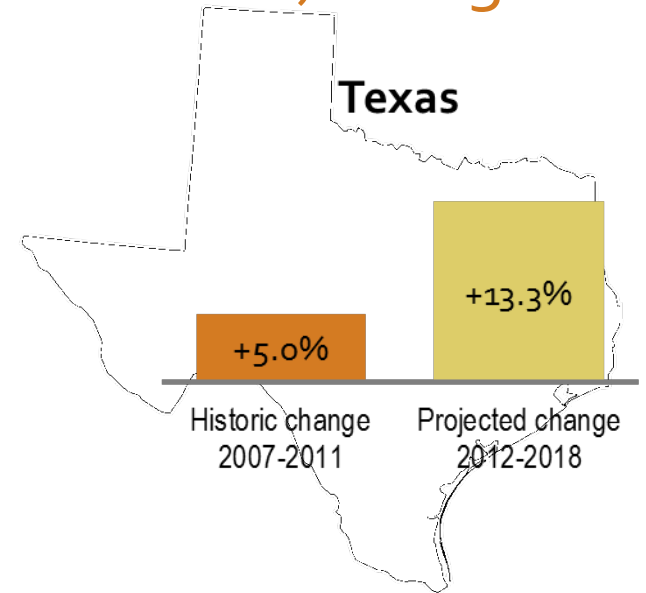
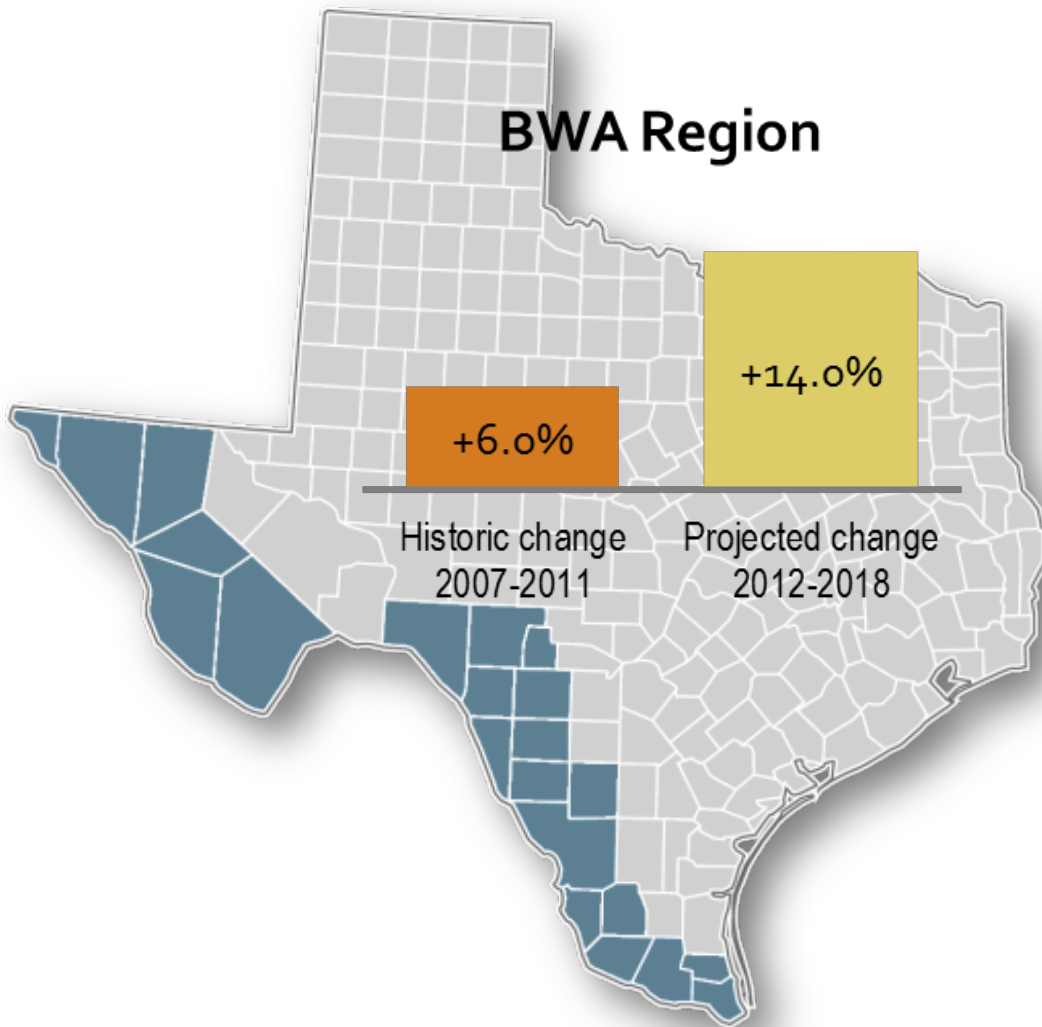
BWA Region by
WF Board Region



Source: U.S. Bureau of
Economic Analysis, CA30

Total employment

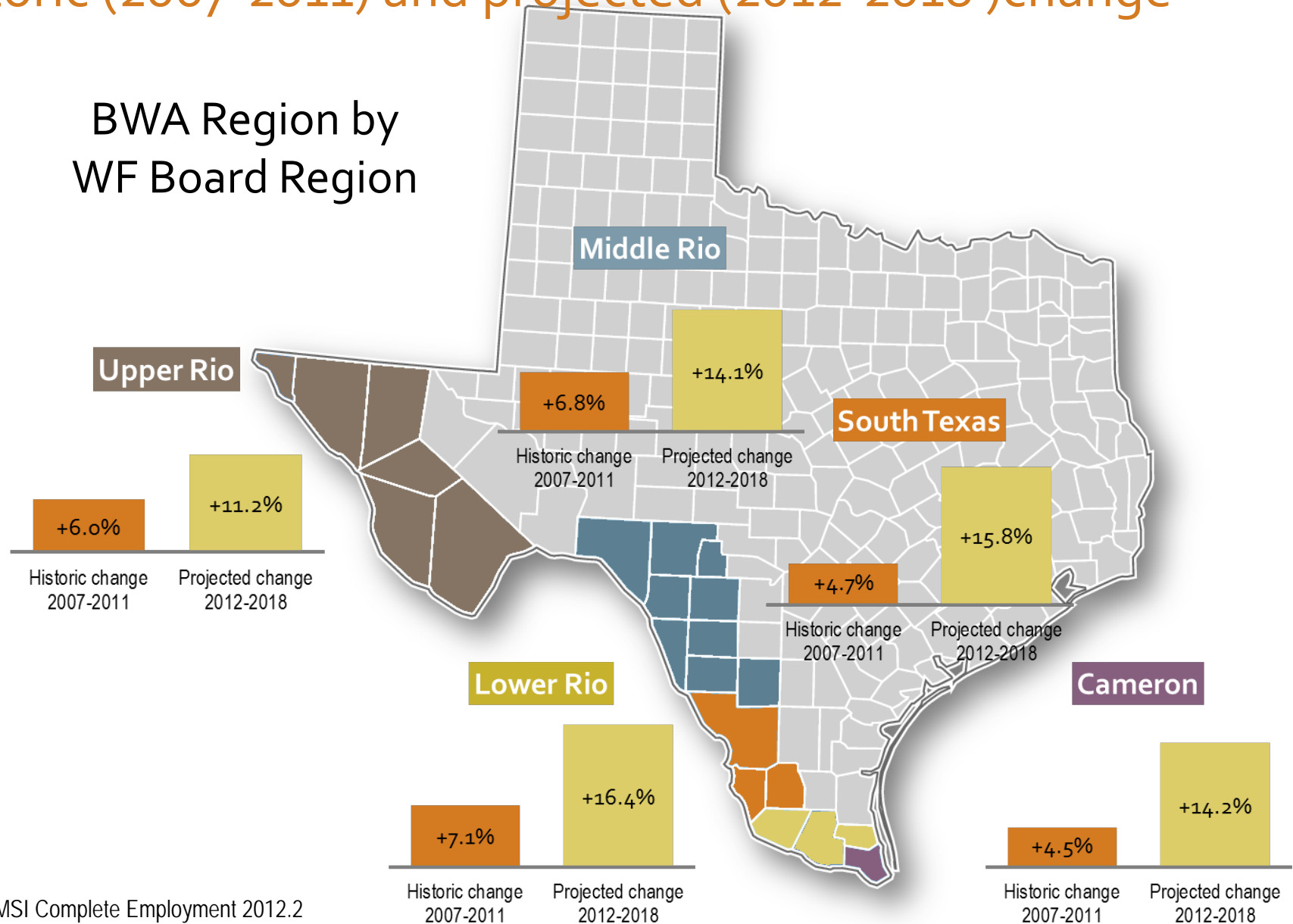
Historic (2007-2011) and projected (2012-2018) change



Total employment

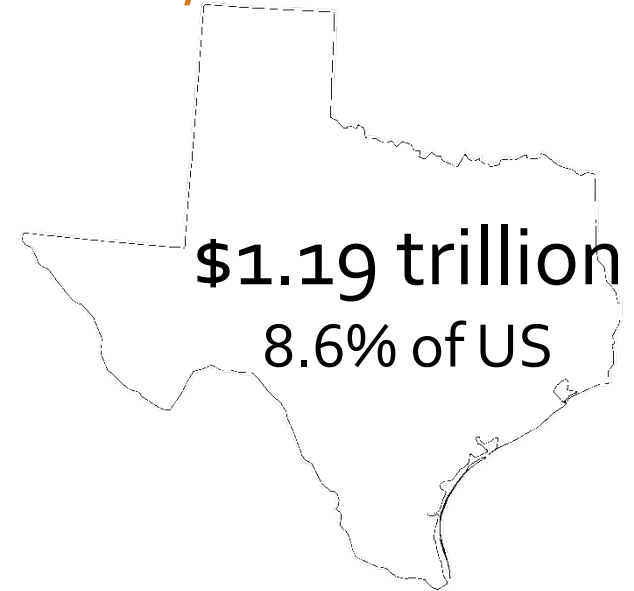
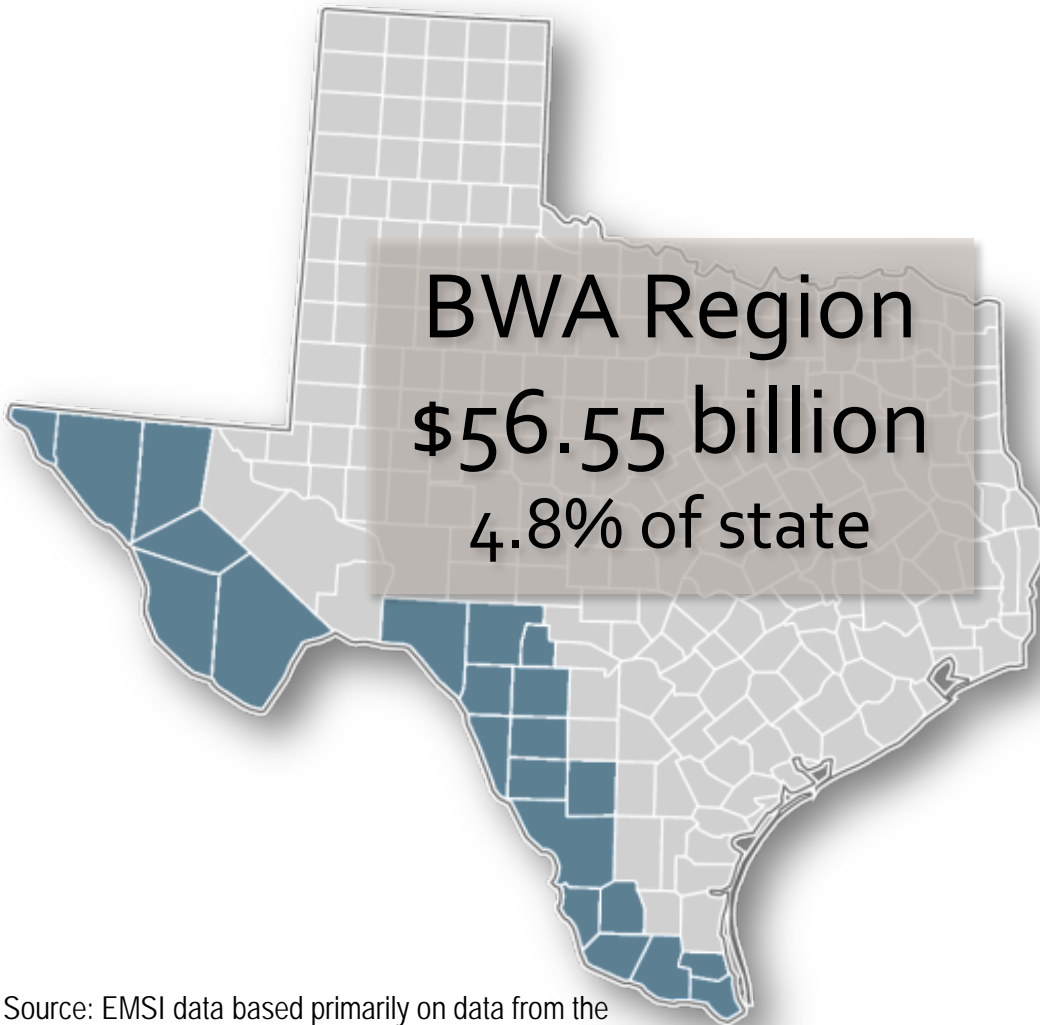
Historic (2007-2011) and projected (2012-2018) change

BWA Region by
WF Board Region



Gross regional product

Market value of all final goods and services, 2011

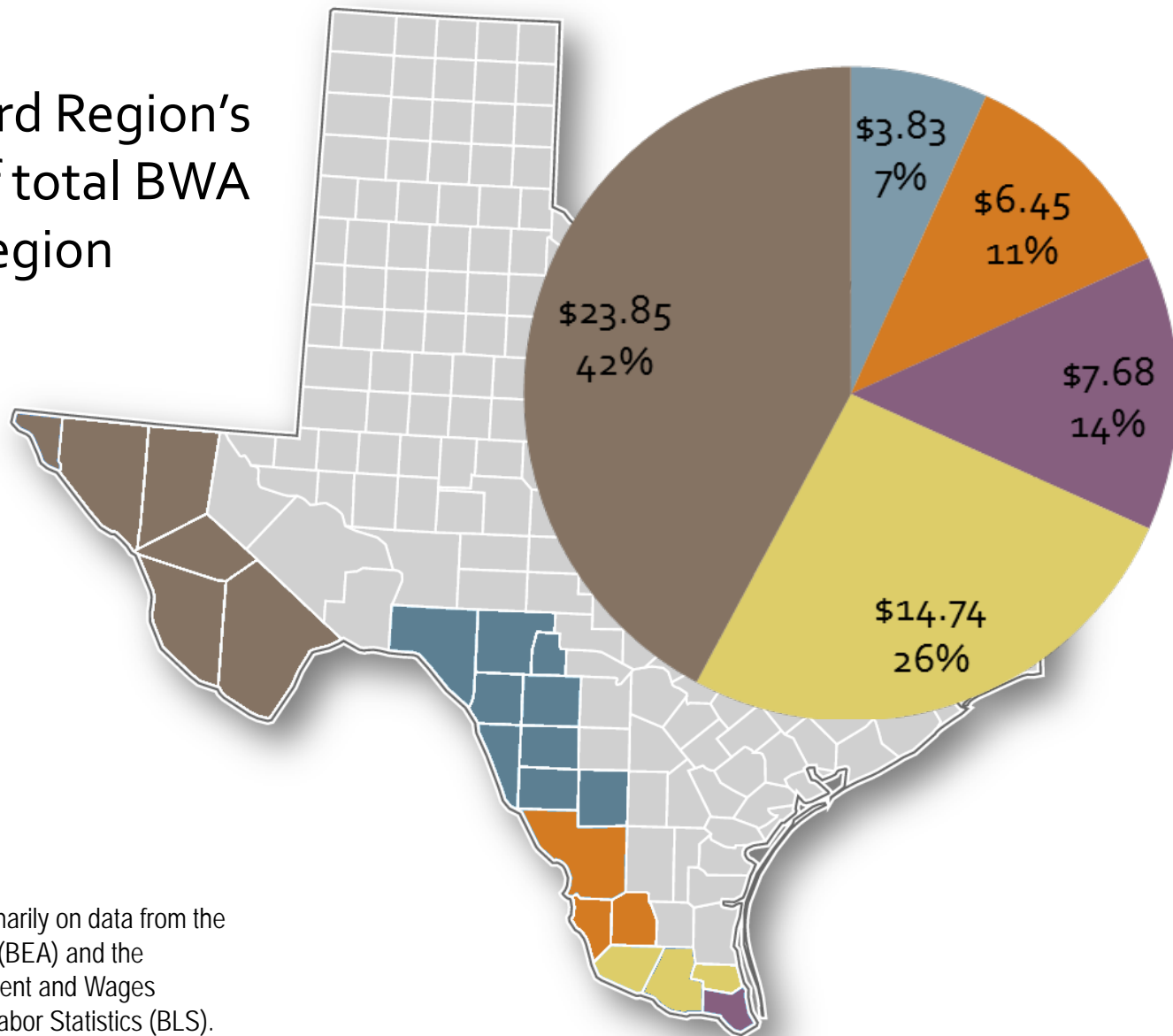


Source: EMSI data based primarily on data from the Bureau of Economic Analysis (BEA) and the Quarterly Census of Employment and Wages (QCEW) from the Bureau of Labor Statistics (BLS).

Gross regional product, in billions

Market value of all final goods and services, 2011

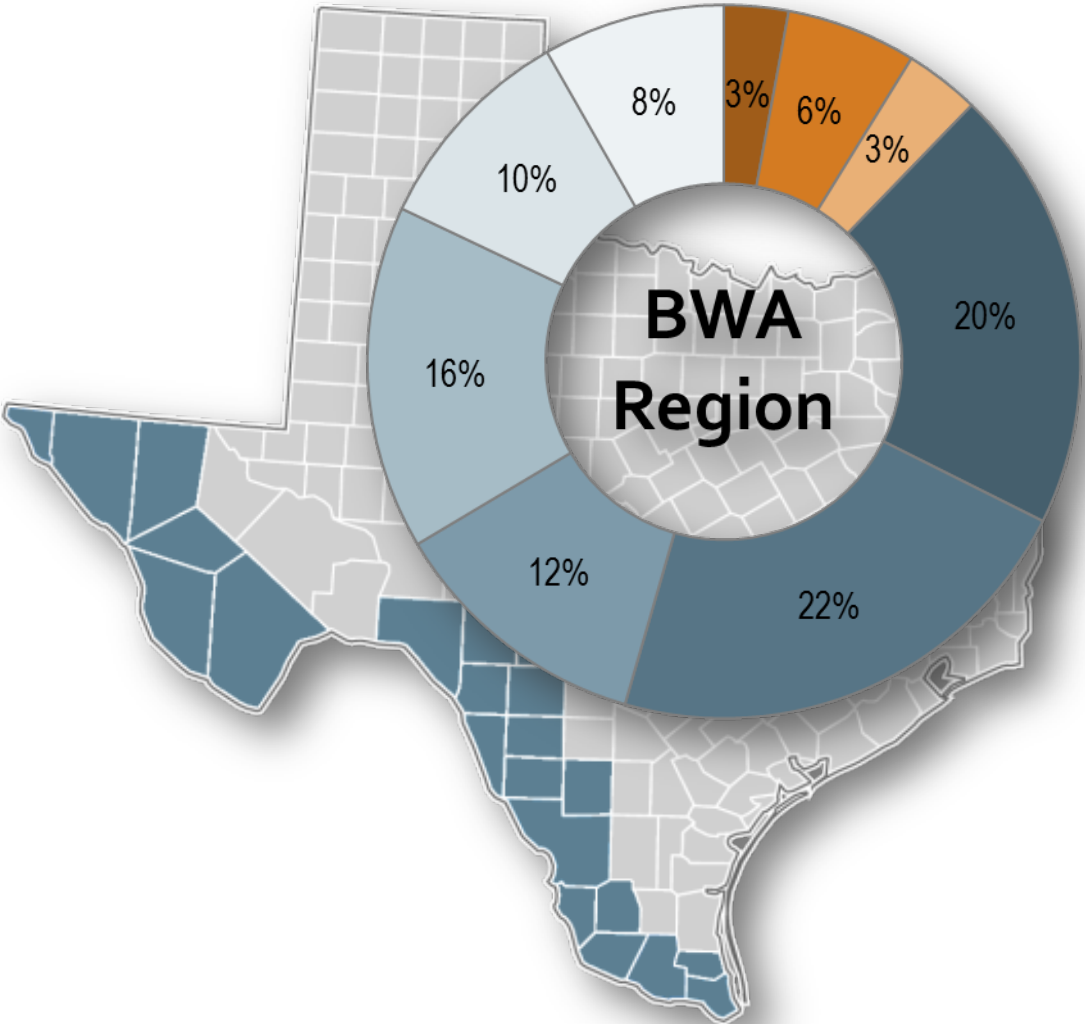
WF Board Region's
share of total BWA
Region



Source: EMSI data based primarily on data from the Bureau of Economic Analysis (BEA) and the Quarterly Census of Employment and Wages (QCEW) from the Bureau of Labor Statistics (BLS).

Employment by major sector

Distribution of employment, 2011



Goods-producing

- Natural resources, mining, & ag
- Construction
- Manufacturing

Service-producing

- Trade, transportation & utilities
- Services
- Education (public & private)
- Healthcare & social assistance
- Government (local, state, & federal)
- Leisure & hospitality

Source: EMSI Complete Employment 2012.2

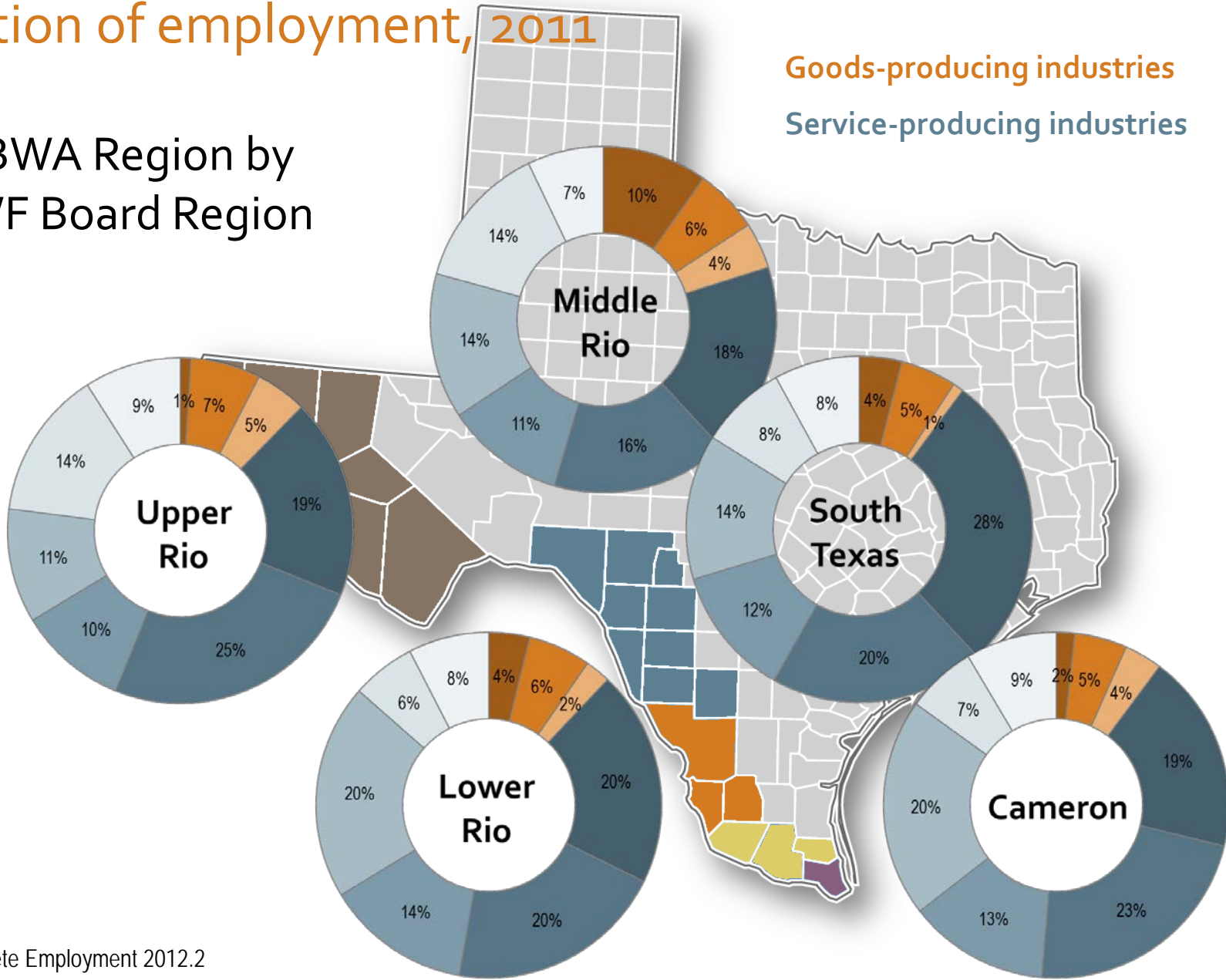
Employment by major sector

Distribution of employment, 2011

Goods-producing industries

Service-producing industries

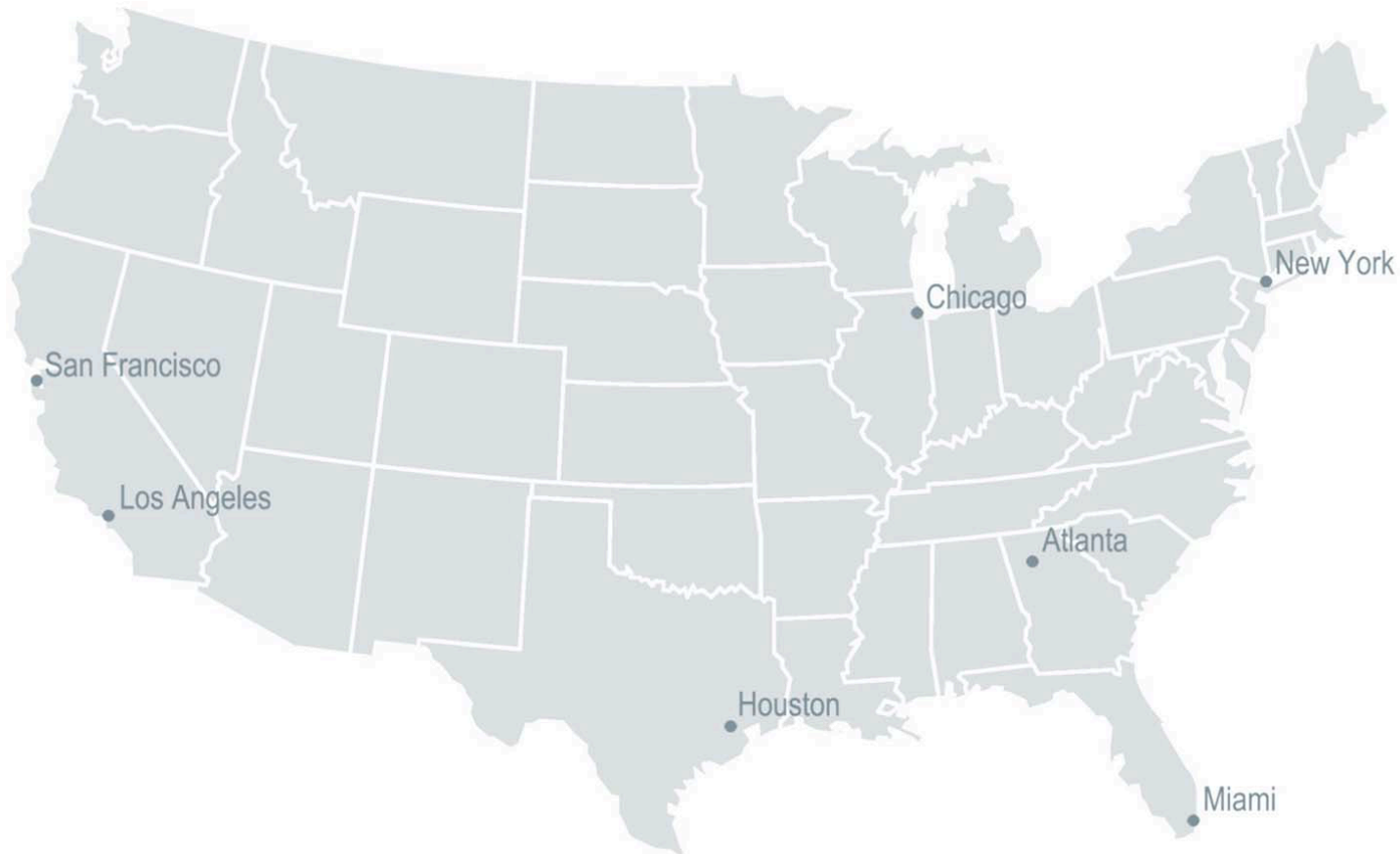
BWA Region by
WF Board Region



Hispanic Scholarship Fund | Demand Occupations Analysis

Regional Profiles

The seven regions profiled on the following pages represent the Hispanic Scholarship Fund's major markets.



High-demand occupations

For US and HSF's major market areas | 2012-2018

▼ high demand occupations (by SOC code)

	Regions ▶								▼ Rank nationally
	Nation	Atlanta	Chicago	Houston	Los Angeles	Miami	New York	San Francisco	
29-1111 Registered Nurses	■	■	■	■	■	■	■	■	1
13-2052 Personal Financial Advisors	■	■	■	■	■	■	■	■	2
13-2011 Accountants and Auditors	■	■	■	■	■	■	■	■	3
25-2021 Elementary School Teachers, Except Special Education	■	■	■	■	■	■	■	■	4
25-2031 Secondary School Teachers, Except Special and Vocational Education	■	■	■	■	■	■	■	■	5
25-3099 Teachers and Instructors, All Other	■	■	■	■	■	■	■	■	6
25-2022 Middle School Teachers, Except Special and Vocational Education	■	■	■	■	■	■	■	■	7
15-1051 Computer Systems Analysts	■	■	■	■	■	■	■	■	8
15-1031 Computer Software Engineers, Applications	■	■	■	■	■	■	■	■	9
25-2011 Preschool Teachers, Except Special Education	■	■	■	■	■	■	■	■	10
27-1024 Graphic Designers	■	■	■	■	■	■	■	■	11
13-2051 Financial Analysts	■	■	■	■	■	■	■	■	12
13-1161 Market Research Analysts	■	■	■	■	■	■	■	■	13
15-1032 Computer Software Engineers, Systems Software	■	■	■	■	■	■	■	■	14
17-2051 Civil Engineers	■	■	■	■	■	■	■	■	21
23-2011 Paralegals and Legal Assistants	■	■	■	■	■	■	■	■	28
17-2171 Petroleum Engineers	■	■	■	■	■	■	■	■	N/A

Projected openings by category

22-COUNTY BWA REGION | 2012-2018

Description	2012 Jobs	2018 Jobs	Openings (2012-18)	Entry-Level Openings for College Graduates* (2012-18)		
				Number	Share of Total Openings	
Education	88,111	102,754	25,922	17,630	68.0%	
Healthcare	96,791	118,288	30,396	7,102	23.4%	
Managerial & Professional Office	113,432	130,684	30,063	6,572	21.9%	
STEM	24,695	27,860	6,587	3,953	60.0%	
Community Svcs & Arts	31,907	36,259	8,724	1,853	21.2%	
Food & Personal Services	243,590	280,280	70,554	462	0.7%	
Blue Collar	228,227	245,084	46,692	115	0.2%	
Sales & Office Support	298,301	327,427	72,330	12	0.0%	
Not applicable	30,466	31,140	4,264			
Grand Total	1,155,520	1,299,776	295,532	165,201	55.9%	

Source: EMSI Complete Employment 2012.1, BLS Employment Projections Education & Training Requirements. Broad occupational categories defined in *Help Wanted: Projections of Jobs and Education Requirements Through 2018*, Anthony P. Carnevale et al., June 2010.

*Defined as those jobs that require an associate's or bachelor's degree and less than one year of work experience to gain entry into the occupation.

Top 10 high-demand occupations

22-COUNTY BWA REGION | 2012-2018

SOC Code	Description	Openings (2012 - 18)
25-2021	Elementary School Teachers, Except Special Ed.	5,994
29-1111	Registered Nurses	5,026
25-2031	Secondary School Teachers, Except Special & Vocational Ed.	3,721
25-2022	Middle School Teachers, Except Special & Vocational Ed.	2,859
13-2011	Accountants and Auditors	1,970
13-2052	Personal Financial Advisors	1,910
25-3099	Teachers and Instructors, All Other	1,774
25-2011	Preschool Teachers, Except Special Ed.	1,149
25-2041	Special Education Teachers, Preschool & Elementary	617
21-1021	Child, Family, and School Social Workers	563

Source: EMSI Complete Employment 2012.1

Industries

linked to high-demand occupations

22-COUNTY BWA REGION | 2012-2018

10 high-demand occupations (by SOC code) ▶

▼ most impacted industries (by NAICS code)

Industry (NAICS code)	25-2021	29-1111	25-2031	25-2022	13-2011	13-2052	25-3099	25-2011	25-2041	21-1021	Share of this industry that the 10 high demand occupations represent as a group
6111 Elementary and Secondary Schools	■	■	■	■	■	■	■	■	■	■	47.7%
5412 Accounting, Tax Preparation, Bookkeeping, and Payroll Services	■	■	■	■	■	■	■	■	■	■	34.6%
6244 Child Day Care Services	■	■	■	■	■	■	■	■	■	■	31.0%
6221 General Medical and Surgical Hospitals	■	■	■	■	■	■	■	■	■	■	30.4%
6223 Specialty (except Psychiatric and Substance Abuse) Hospitals	■	■	■	■	■	■	■	■	■	■	23.9%
5239 Other Financial Investment Activities	■	■	■	■	■	■	■	■	■	■	21.3%
6116 Other Schools and Instruction	■	■	■	■	■	■	■	■	■	■	18.1%
6214 Outpatient Care Centers	■	■	■	■	■	■	■	■	■	■	16.9%
6222 Psychiatric and Substance Abuse Hospitals	■	■	■	■	■	■	■	■	■	■	15.9%
6216 Home Health Care Services	■	■	■	■	■	■	■	■	■	■	14.2%

25-2021 Elementary School Teachers, Except Special Ed.
 29-1111 Registered Nurses
 25-2031 Secondary School Teachers, Except Special & Vocational Ed.
 25-2022 Middle School Teachers, Except Special & Vocational Ed.
 13-2011 Accountants and Auditors
 13-2052 Personal Financial Advisors
 25-3099 Teachers and Instructors, All Other
 25-2011 Preschool Teachers, Except Special Ed.
 25-2041 Special Education Teachers, Preschool & Elementary
 21-1021 Child, Family, and School Social Workers

Other BWA Issues/Opportunities

- Federal burden (e.g., border security, customs, port infrastructure, IBWC)
- Mexican investment & purchasing
- Winter Texans
- Maquiladora
- Specific events (Eagle Ford Shale, Fort Bliss)

THANK YOU

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