Stronger Economies Together
Strategies for Building New Economic Opportunities

Comprehensive Economic Development Strategy
CEDS Regional Plan
2017 - 2021
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**Stronger Economies Together Initiative**

The Stronger Economies Together (SET) program was launched in 2009 by USDA Rural Development in collaboration with the nation’s Regional Rural Development Centers (RRDC) and their land-grant university partners. The purpose of SET is to strengthen the capacity of communities in rural America to work together in developing and implementing an economic development blueprint that strategically builds on the current and emerging economic strengths of regions. Important elements of the Stronger Economies Together program will build collaboration between regional communities, provide economic analyses tailored to help capture the region’s current or emerging clusters and comparative economic advantages and is supported by technical assistance provided by land-grant university extension systems to the regions over a period of several months including the SET training.

In 1973, Crawford, Dubois and Orange Counties sought to join together to form an organization to help plan and encourage economic development for the Patoka Lake area. They, along with the State of Indiana, formed the Patoka Lake Regional Planning Commission.

The counties of Perry and Spencer joined the commission by resolution in 1974 and Pike County followed in 1993. The name was changed in 1978 to the Indiana 15 Regional Planning Commission.

The Indiana 15 region has been established not only through State of Indiana Statute, but also as an economic development district by designation of the US Department of Commerce – Economic Development Administration.

Indiana 15 Regional Planning Commission assembles a Comprehensive Economic Development Strategy (CEDS) that compiles a list of projects needed by each county in the six-county region as well as the region. Indiana 15 and the individual counties use this document to track and prioritize projects. The commission utilized the economic cluster and demographic data developed by the Stronger Economies Together program in the CEDS document.

**Indiana 15 Region Executive Summary**

The Indiana 15 region’s economy is rich with forest and wood product business at ten times more concentration than the national average. Other strong clusters in the region are agribusiness and advanced materials-including primary metals and transportation equipment that support the regional supply chain.

The Indiana 15 region also has mature industries in the computer and electronic manufacturing and tourism and visitor clusters, transforming energy industry and technology and telecom clusters. The clusters identified in this section show opportunity for growth, have a presence in some regional counties, have regional impact and were used to dive deeper into the regional data. The needs of the strong clusters were used to develop the goals of this report.

This SET Regional Economic Development Plan will serve as a roadmap for future economic development efforts of the Indiana 15 Region. Key regional stakeholders embrace a spirit of regionalism to support this initiative. Implementing the action items described within this document will strengthen the ability of the Indiana 15 Region to secure its economic future and position it as a competitive region. This plan reflects a planning process with active participation and foundational investment from business, civic, and community leaders. Significant research and discussions have led to the development of this plan.
Introduction

Regional Collaboration

The Stronger Economies Together project was supported by several key decision makers in the region whose input was invaluable throughout the SET process. Those active in developing this plan were representatives from Indiana 15 Regional Planning Commission staff and Board members, State, County, City and Town elected officials, business owners, youth organizations, Purdue Extension, Community Foundations, local utilities, United States Department of Agriculture (USDA), Chambers of Commerce, disadvantaged organizations, farming, transportation, Economic Development, manufacturing, education, Indiana Office of Community and Rural Affairs (OCRA), Indiana Association of Regional Councils (IARC), recreation and local residents. The list of the Indiana 15 Region – Stronger Economies Together Team is in Appendix A.

Key decision makers’ explicitly expressed commitment to support the plan’s process and implementation.

- Alvin Evans – Perry County Port Authority/Development Corporation
- Beverly Schulthise – Town of Ferdinand
- Cheri Taylor – Indiana 15 Regional Planning Commission
- Jeff Rogers – ATTC Manufacturing
- Lisa Gehlhausen – Indiana 15 Regional Planning Commission
- Nathan Held – Indiana 15 Regional Planning Commission
- Rudy Freeman – Orange County Resident
- Steve Bartels – Crawford County Business owner/County Council
- Tara Damin – Women/Perry County Resident
- Al Logsdon – Spencer County Commissioners
- Doug Merkel – Patoka Lake Regional Water & Sewer District

Evidence Basis for Plan

Regional Demographic Data

The 2010 census shows the population of the Indiana 15 Region is 125,577 reflective of a 3.1% increase since the 2000 census.

The region has an aging population. The age distribution of the 2000 population was very close to the state average in each age category except 20-29 year olds in which the region lagged. The 2014 data, shows the region equivalent to the state average in the 40-49 age category, less than the state average in all younger categories and over the state average in all older categories.

The region also doubled the Hispanic population from 1.5% in 2000 to 3.4% in 2014.

The median household income decreased $4,700 from 2003-2013. During the same timeframe, the total population in poverty increased by 3.8% to a total of 12.4% and minors (age 0-17) in poverty increased by 6% to a total of 17.4%. The percentage with some or no high school is 2% higher in the region than in the rest of the state of Indiana. The state has 11% more population with higher than a high school diploma than the region. There was discussion that the decrease in household income, increase in poverty and less than the state average in education could be linked.

Community Forum – October 29, 2015
Regional Economic Data

Unemployment in the Indiana 15 region was equal to the Indiana state average from 2004-2006. Since 2007, unemployment has been lower in the Indiana 15 region than in the rest of the state, partly due to manufacturing and large retail expansions. The low unemployment rate only tells part of the story.

Discussion throughout the plan development process included hearing from manufacturing firms about jobs that go unfilled and about the difficulty in finding and keeping workers. Manufacturers have increased the recruitment area, incentives and benefits and made changes to rehiring policies in an effort to alleviate the need for workers.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Population in Poverty</th>
<th>Minors (Age 0-17) in Poverty</th>
<th>Real Median Household Income* ($ 2013)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>8.6%</td>
<td>11.4%</td>
<td>$52,934</td>
</tr>
<tr>
<td>2008</td>
<td>11.0%</td>
<td>14.8%</td>
<td>$52,322</td>
</tr>
<tr>
<td>2013</td>
<td>12.4%</td>
<td>17.4%</td>
<td>$48,217</td>
</tr>
</tbody>
</table>

Graphic by Purdue Center for Research Development
There are 73,327 workers in the Indiana 15 region. 35,644 workers – representing 48.6% of the total - live and work in the region. 15,356 labor shed workers - commute into, but live outside the region. 22,327 commute shed workers - live in but commute outside the region to work. This leaves the net commute workers at a negative 6,971 workers. The commute shed workers are employed in the surrounding counties as well as the Evansville, Indianapolis and Louisville metropolitan areas.

Workers in the Indiana 15 region also make $5,367 less annually than workers in the rest of the state. Possible reasons for the difference could be the lower education rate, under-employment and the number of entry level/lower wage positions of the region.

**Earnings per worker, 2014**
There were 8,126 establishments launched in the Indiana 15 region from 2000-2011. During the same time period, 5,054 establishments closed. There was also a net migration of 38 establishments moving into minus moving out of the region leaving a total gain of 3,110 establishments. The increase in establishments took place in the self-employed to nine employees category, so the total number of jobs only increased by 912 or .9%. Total sales for the same time period decreased by nearly $2M.

**Regional Assets**

Our six-county region is comprised of beautiful, natural and historic resources that include forestry, agricultural, farmland, rivers, manufacturing, and various points-of-interest for tourism. It is well-known as one of the most breathtaking areas in the state of Indiana.

One of our greatest assets is the accessibility to outdoor recreation. The region contains over 60,000 acres of Hoosier National Forest that is complimented with state parks and lakes, hiking trails, and many historic features.

With several job opportunities available, we have significant auto-machinery, aerospace, and forestry-product major manufacturing sectors nestled in pockets throughout the six counties. Our region boasts a manufacturing supercluster at three times the national rate.

The region has a long history of woodworking that dates back to the early settlers. These settlers brought skills from their homeland that started our furniture manufacturing businesses. The transportation related manufacturers are inter-related by creating a raw product, further refining or retooling that product and all being part of the same supply chain. The availability of land in close proximity of these manufacturers was a draw for them to locate here.

Major road infrastructure links these sectors, as well as schools, and points of interest horizontally and vertically. This allows residents and visitors ease of access throughout the region to work, live and play. These are all pivotal areas for quality of life in our rural communities.

A region with strong community involvement, the Indiana 15 Region offers multi-cultural festivities, local attractions, music, artisans, wineries, sporting events, theater and historical landmarks to attract future visitors, but also the assets that envelope current residents in our society’s roots. The region’s canvas is far from blank, yet it has much more opportunity to grow and explore.
Potential Barriers and Related Strategies

During the strategy sessions, the top five challenges to the strategic plan were identified. The first barrier in the region is the lack of affordable housing. Housing stock is aging quickly in most areas of the region and there is a strong need for quality affordable housing to attract new residents. Specifically, workforce housing needs to be addressed. A large number of employees commute to their work place because of the lack of acceptable housing located near their employer.

While the work ethic is strong, the region is in need of a more skilled workforce. The region plan needs to address the job skills training and education elements to support the region’s employers. The region also has not been successful in retaining post high school students (age 20-29) to remain in, return to or move to the region for employment after they complete their education.

Substance abuse and mental health continue to be a concern in the communities. The region lacks the adequate amount of support needed to deal with the substance abuse and mental health issues. Alcohol abuse among minors and the increased use of methamphetamines are the biggest abuses facing the region. In 2015, 49 clandestine meth labs were seized by law enforcement in the region. This issue could also contribute to the lack of qualified workers, due to failed drug tests or lack of good role models at home.

The state’s property tax caps that were issued on tax bills due in 2012 have resulted in declining tax revenues for local governments. Local governments have not been able to invest in the needed infrastructure and have had to cut services to their residents as a result of the decrease in revenue. While the quality of education is good, a few schools have faced closure because of the operating deficits due to decreases in funding.

The manufacturers and businesses in the region have positions that go unfilled because of issues raised above and the inability to keep workers. If these businesses do not fill open positions, they will find ways to operate without them such as replacement with robotics, or move to areas with willing workers.

An overarching challenge for the region is to actively work regionally. It is easy to come up with projects for individual counties, but more focus needs to be put on projects that enhance the region to become more competitive.

Regional Economic Goals

The SET team identified strengths, weaknesses, opportunities and threats (SWOT) of the region. The team then utilized its resources to identify four regional economic goals.

Goal 1: Help Businesses Succeed

Goal 2: Enhanced Regional Connectivity

Goal 3: Enhance Quality of Life

Goal 4: Attract Tourists and Enhance Arts
## Regional Economic Development Plan

### Goal 1: Help Businesses Succeed

Promote the development of an economy that enhances the success of Forest and Wood Product businesses, Agri-Business operations and Advanced Materials manufacturers that creates and sustains jobs in order to maintain a quality standard of living.

### Regional Economic Benefits

This goal recognizes that the region has to provide information on qualifications needed for open positions and employment opportunities for potential community workforce; improve the flow; strengthen connectivity; create a regional strategy of business attraction; and expand exporting capacity of existing businesses throughout the region to succeed in continuing economic growth.

<table>
<thead>
<tr>
<th>Actions/Activities</th>
<th>Key Contacts</th>
<th>Timeline</th>
<th>Status</th>
<th>Responsible Party</th>
<th>Measurements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Objective A:</strong> Reduce the number of unfilled positions in existing businesses within the Indiana 15 region.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Implement workforce training with IVY Tech to develop business skills, soft skills and workforce education</td>
<td>Businesses, schools, Local companies, LEDOs, WorkOne</td>
<td>2016-2017</td>
<td>In progress</td>
<td>Tell City IVY Tech director</td>
<td>Number of certificates issued</td>
</tr>
<tr>
<td>2) Host one business job fair</td>
<td>Businesses, media, schools, LEDOs</td>
<td>Ongoing</td>
<td>In progress</td>
<td>LEDOs</td>
<td>Number of businesses attending and jobs filled</td>
</tr>
<tr>
<td>3) Encourage vocational training in regional high schools</td>
<td>School counselors, businesses, state, community foundations</td>
<td>Ongoing</td>
<td>In progress</td>
<td>High School Counselors</td>
<td>Number of students in career technical classes</td>
</tr>
<tr>
<td>4) Create internships and externships</td>
<td>Schools, businesses</td>
<td>Ongoing</td>
<td>In progress</td>
<td>School Counselors</td>
<td>Host job fair</td>
</tr>
<tr>
<td>5) Create a mentoring program for young workers</td>
<td>SBDC, schools, SCORE, WorkOne</td>
<td>Ongoing</td>
<td>In progress</td>
<td>School Counselors</td>
<td>Ten internships in first year</td>
</tr>
</tbody>
</table>

### Objective B: Promote the effective flow of people and materials within the Indiana 15 region.

<table>
<thead>
<tr>
<th>Actions/Activities</th>
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<th>Responsible Party</th>
<th>Measurements</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Enhance traffic flow within the region</td>
<td>Businesses, INDOT, municipalities, LTAP, IN15</td>
<td>2016</td>
<td>Asset Management Training hosted</td>
<td>INDOT Vincennes District</td>
<td>Host INDOT training</td>
</tr>
<tr>
<td>2) Enhance traffic flow from the region to other economies</td>
<td>Businesses, INDOT, municipalities</td>
<td>2030</td>
<td>Long-term</td>
<td>INDOT Vincennes District</td>
<td>Mid-States corridor</td>
</tr>
<tr>
<td>3) Improve transportation infrastructure that facilitates the expansion of existing businesses and attracts new, higher-wage industry sectors</td>
<td>Businesses, LEDOs, Ports, INDOT, SWIDC, municipalities</td>
<td>2023</td>
<td>Planning</td>
<td>INDOT Vincennes District</td>
<td>Expand two businesses and attract two new businesses</td>
</tr>
<tr>
<td>4) Promote ride-share programs</td>
<td>Businesses, local government</td>
<td>2020</td>
<td>Development</td>
<td>Business HR</td>
<td>Creation of park &amp; ride opportunities</td>
</tr>
</tbody>
</table>
**Objective C: Strengthen the synergy and connectivity among existing businesses.**

<table>
<thead>
<tr>
<th>1) Host industry sector summits</th>
<th>Chambers, LEDOs, Purdue Extension</th>
<th>2016-2017</th>
<th>Planning</th>
<th>LEDOs</th>
<th>Host one summit in 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>2) Facilitate access to business assistance resources</td>
<td>Chambers, LEDOs, Purdue Extension</td>
<td>2016-2017</td>
<td>Planning</td>
<td>Chamber directors</td>
<td>Host one panel discussion</td>
</tr>
</tbody>
</table>

**Objective D: Creating a regional strategy of attracting businesses.**

| 1) Enhance cooperation among regional LEDO/Chambers | LEDOs, Chambers, SWIDC | Ongoing | In progress | SWIDC Board | One regional project per three-year period |
| 2) Recruit businesses to fill leakages (see chart-Appendix D) | LEDOs, Chambers | Ongoing | Development | LEDOs | One business leakage firm lead contacted per year |
| 3) Create a “Business Information Packet” for the Indiana 15 region that includes an inventory of resources and a survey for feedback | LEDOs, Chambers, SWIDC | 2020 | Planning | SWIDC Board | Packet created representing the entire six-county region |
| 4) Engage local leaders on programs that support business development | LEDOs | 2020 | Development | Chamber directors | Host one panel discussion |

**Objective E: Expand exporting capacity of existing businesses.**

| 1) Educate existing businesses on export fundamentals | IEDC, PCRD | 2023 | Development | IEDC Director | Host one workshop by 2023 |
| 2) Educate existing businesses on export opportunities | Chambers, LEDOs, IEDC | 2023 | Development | LEDOs | Host one workshop by 2023 |

**Key Partners:**

- Crawford County – Chamber, Economic Development
- Dubois County – Dubois Strong, Ferdinand Chamber, Jasper Chamber, Huntingburg Chamber
- Orange County – Economic Development
- Perry County – Chamber, Development Corporation
- Pike County – Economic Growth Council, Chamber
- Spencer County – Lincolnland Economic Development, Regional Chamber
- Ivy Tech, SWIDC, INDOT, IEDC

**Target Outcomes:**

- Reduce the number of unfilled positions by 25% by December 2018 within the Indiana 15 region.
- Steady workforce with little turnover measured by the qualitative information shared by LEDOs.
- Each of the Indiana 15 counties completing an asset management plan of roads and streets by July 2017.
- Prepare at least two Community Crossings road assistance applications in 2016.
- Increase business connections by 20% by 2018.
- Reduce business leakages by 10% by 2025.
- One business with added export activity by 2018.

**Short Term:**

- Visit business leaders to discuss needs (workforce, export, transportation, connectivity)
- Host regional transportation asset management workshop
- Engage county LEDOs and chambers to host an industry sector summit
Intermediate:
- Increase soft skills in potential workforce
- Information on types of education/skills needed (Newspaper business spotlight)
- Host industry sector summit

Long Term:
- Provide qualified workforce
- Strengthen the synergy and connectivity among existing businesses

Awards Received:
- National Association of Development Organizations – Tell City Regional Workforce Development Project
- Indiana Association of Regional Councils – Community Crossings Transportation Award
Goal 2: Enhance Regional Connectivity

Ensure efficient utilities and infrastructure to support regional growth of Forest and Wood Product businesses, Agri-Business operations and Advanced Materials manufacturers and their employees.

Regional Economic Benefits

This goal will provide improvements and affordability to utilities; telecommunications; promote energy efficient heating and cooling options; and market the strengths of regional collaboration that will allow residents and business to grow.

<table>
<thead>
<tr>
<th>Actions/Activities</th>
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<th>Measurements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective A: Ensure that residents and businesses within the Indiana 15 region have access to affordable water, efficient wastewater treatment and stormwater drainage.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Inventory utility needs of the region</td>
<td>Indiana 15 RPC, cities, towns, county’s, utility providers</td>
<td>2016-2017</td>
<td>Ongoing</td>
<td>Indiana 15 RPC</td>
<td>Annual &amp; Five year CEDS</td>
</tr>
<tr>
<td>2) Document future infrastructure needs of the region</td>
<td>Indiana 15 RPC, cities, towns, county’s, utility providers</td>
<td>2016-2017</td>
<td>Draft in progress</td>
<td>Indiana 15 RPC</td>
<td>Annual &amp; Five year CEDS</td>
</tr>
<tr>
<td>3) Seek funding to support infrastructure enhancements</td>
<td>Indiana 15 RPC, USDA, SRF, OCRA</td>
<td>2016-2018</td>
<td>Planning</td>
<td>Indiana 15 RPC</td>
<td>One infrastructure improvement project in 2016 and two in 2017</td>
</tr>
<tr>
<td>Objective B: Ensure that residents and businesses within the Indiana 15 region have access to efficient telecommunications.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Take inventory of needs/wants and system options/limitations/ availability of telecom systems</td>
<td>Indiana 15 RPC, cities, towns, county’s, telephone/internet providers</td>
<td>2017</td>
<td>Planning</td>
<td>State telecommunications task force</td>
<td>Inventory report</td>
</tr>
<tr>
<td>2) Meet with providers to seek resolution to documented needs/wants/limitations</td>
<td>Indiana 15 RPC, cities, towns, county’s, telephone/internet providers</td>
<td>2018</td>
<td>Planning</td>
<td>Indiana 15 RPC</td>
<td>One new extension of service</td>
</tr>
<tr>
<td>Objective C: Ensure that residents and businesses within the Indiana 15 region have efficient heating and cooling options.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Educate and inform residents and businesses on energy efficient heating and cooling choices.</td>
<td>Utilities, Rural Electric Coops, AMP, LHDC, Tri-Cap</td>
<td>2019</td>
<td>Development</td>
<td>Utilities marketing</td>
<td>Energy efficiency for one community building</td>
</tr>
<tr>
<td>Objective D: Promote and market the strengths of regional collaboration.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Promote Indiana 15 RPC’s historical and current plans for regional collaboration.</td>
<td>Indiana 15 RPC</td>
<td>Ongoing</td>
<td>Ongoing</td>
<td>Indiana 15 RPC</td>
<td>Increased requests</td>
</tr>
<tr>
<td>2) Report on current projects through a regional newsletter</td>
<td>Indiana 15 RPC</td>
<td>Annually</td>
<td>Ongoing</td>
<td>Indiana 15 RPC</td>
<td>Increase electronic distribution</td>
</tr>
<tr>
<td>3) Enhance the regional website to include links to regional information</td>
<td>Indiana 15 RPC</td>
<td>2016</td>
<td>Intern secured</td>
<td>Indiana 15 RPC</td>
<td>Feedback and number of hits</td>
</tr>
<tr>
<td>4) Connect leaders to discuss and learn about opportunities to partner on multi-jurisdictional needs</td>
<td>Indiana 15 RPC, county’s, cities, towns, leadership academies</td>
<td>Ongoing</td>
<td>In progress</td>
<td>Indiana 15 RPC</td>
<td>Participation in CEDS and SET</td>
</tr>
</tbody>
</table>
Key Partners:
- Crawford County – Cities and Towns and utilities
- Dubois County – Cities and Towns and utilities
- Orange County – Cities and Towns and utilities
- Perry County – Cities and Towns and utilities
- Pike County – Cities and Towns and utilities
- Spencer County – Cities and Towns and utilities
- Indiana 15 RPC, NADO, IARC, IUPUI, State Telecommunications Task Force

Target Outcomes:
- Improve one community’s infrastructure (water, wastewater, stormwater) per year.
- Increase regional square miles served by Internet Service Providers by 5% by 2018.
- Improve energy efficiency in one community building by 2019.
- Increase target audience by marketing regional success stories by 20% by 2019.

Short Term:
- Inventory regional infrastructure needs (working with IUPUI)
- Inform public of deployment progress of high-speed options as they become available in the area
- Inform public of energy efficiency options in the region
- Enhance Indiana 15 RPC regional website

Intermediate:
- Engage local officials, prioritize and share information on infrastructure needs throughout the region

Long Term:
- Seek resources to fill infrastructure needs
- Provide high-speed, robust internet in the region
- Improve energy efficiency throughout the region
- Promote the creation endowments to facilitate expenses to carry out projects.
Goal 3: Enhance Quality of Life

Promote an increased general well-being of individuals in the Indiana 15 region to aid in recruitment, retention and overall enjoyment and stability of residents within Forest and Wood Product businesses, Agri-Business operations and Advanced Materials manufacturers.

Regional Economic Benefits

This goal seeks increased quality of life and entices people to live in the region by increasing safe and affordable housing; access to health care; access to recreation areas; and promoting regional assets thereby reducing the commutershed footprint.

<table>
<thead>
<tr>
<th>Actions/Activities</th>
<th>Key Contacts</th>
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<th>Status</th>
<th>Responsible Party</th>
<th>Measurements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective A: Increase safe and affordable housing for all ages.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Utilize information gained from the Purdue Housing Pilot Project to identify the housing needs within the region</td>
<td>Tri-Cap, LHDC, Hoosier Uplands, Purdue Extension, IHCD</td>
<td>2017</td>
<td>In progress</td>
<td>Purdue University</td>
<td>Presentation early 2017 by IEDC</td>
</tr>
<tr>
<td>2) Ensure regional communities have adequate policies for safe housing</td>
<td>USDA RD, Tri-Cap, LHDC, Hoosier Uplands, Local Govt.</td>
<td>Ongoing</td>
<td>Ongoing</td>
<td>Tri-Cap, LHDC, Hoosier Uplands directors</td>
<td>Adopt and enforce unsafe building ordinances</td>
</tr>
<tr>
<td>3) Collaborate with community housing development organizations</td>
<td>Tri-Cap, LHDC, Hoosier Uplands, IHCD</td>
<td>Ongoing</td>
<td>Ongoing</td>
<td>Tri-Cap, LHDC, Hoosier Uplands directors</td>
<td>Identify the number of substandard housing units</td>
</tr>
<tr>
<td>4) Investigate successful best approach for addressing the affordable housing issue.</td>
<td>Tri-Cap, LHDC, Hoosier Uplands, Purdue Extension, IHCD, OCRA</td>
<td>2016</td>
<td>In progress</td>
<td>Tri-Cap, LHDC, Hoosier Uplands directors</td>
<td>Report outlining best practices</td>
</tr>
</tbody>
</table>

Objective B: Increased accessibility to rural health care.

<table>
<thead>
<tr>
<th>Actions/Activities</th>
<th>Key Contacts</th>
<th>Timeline</th>
<th>Status</th>
<th>Responsible Party</th>
<th>Measurements</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Aggregate information on available health care, mental health care and substance abuse agencies</td>
<td>Area hospitals, Southern Hills, Healthcare agencies, IRHA</td>
<td>2016</td>
<td>Planning</td>
<td>Indiana 15 RPC, Healthcare agency directors</td>
<td>Complete report by 10/2017 to be available via website</td>
</tr>
<tr>
<td>2) Convene mental health care agencies to discuss needs</td>
<td>Southern Hills, Healthcare agencies</td>
<td>Meet bi-annually</td>
<td>Planning</td>
<td>Southern Hills director</td>
<td>Greater understanding of mental health needs.</td>
</tr>
<tr>
<td>3) Collaborate to ensure that EMA staffing and ambulatory needs are met-especially in rural areas.</td>
<td>EMA, counties</td>
<td>Ongoing</td>
<td>Plan implementation in progress</td>
<td>EMA directors</td>
<td>Decrease response times by 10% by 2018</td>
</tr>
</tbody>
</table>

Objective C: Increased access and amenities at parks, trails and recreation areas.

<table>
<thead>
<tr>
<th>Actions/Activities</th>
<th>Key Contacts</th>
<th>Timeline</th>
<th>Status</th>
<th>Responsible Party</th>
<th>Measurements</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Mapping existing parks, trails, and public water access sites</td>
<td>Indiana 15 RPC, Park Boards, Army Corp, DNR, HNF</td>
<td>2019</td>
<td>Planning</td>
<td>Indiana 15 RPC</td>
<td>Complete map of existing and proposed regional parks</td>
</tr>
<tr>
<td>2) Increased connectivity of trails within communities and the region</td>
<td>Indiana 15 RPC, Park Boards, IDNR, trail groups</td>
<td>2020</td>
<td>Planning</td>
<td>Park Boards, County Highway, City &amp; Town Street Departments</td>
<td>Add four miles of trail in Indiana 15 region</td>
</tr>
</tbody>
</table>
3) Promote ride bicycles to work opportunities
   Indiana 15 RPC, Park Boards, Cities/Towns 2020 Planning Park Boards Map of bike paths for commuters

4) Establish a regional trails focus group to include representatives from each county
   Indiana 15 RPC, Park Boards 2023 Development Park Boards Development of Regional Trails group and regular meeting schedule

5) Promote youth activities
   YMCA, Youth Organizations 2018 Development YMCA Marketing Schedule of youth year-round events

Objective D: Promoting regional assets.

1) Create a asset marketing packet (education, work ethic, low crime, job availability, etc)
   Indiana 15 RPC, CVBs, Chambers, OCRA HCI 2020 Development Indiana 15 RPC A marketing packet with all listed information

2) Enhance Indiana 15 RPC website to be used as a regional resource
   Indiana 15 RPC, counties 2017 In progress Indiana 15 RPC Update website with medical, recreation and local ordinances

Key Partners:
- Crawford County – Local governments, EMA, Park Boards and medical providers
- Dubois County – Local governments, EMA, Park Boards and medical providers
- Orange County – Local governments, EMA, Park Boards and medical providers
- Perry County – Local governments, EMA, Park Boards and medical providers
- Pike County – Local governments, EMA, Park Boards and medical providers
- Spencer County – Local governments, EMA, Park Boards and medical providers
- Indiana 15 RPC, YMCA, Tri-Cap, Lincoln Hills Development, Hoosier Uplands, Purdue, OCRA, Indiana Housing and Community Development Authority, Indiana Department of Natural Resources

Target Outcomes:
- Eliminate four blighted housing structures within the Indiana 15 region by 2017.
- Reduce the emergency response time in one community by 2020.
- Develop one new or enhanced public access site per year.
- Market the region through an enhanced website with a 10% increase in hits by 2017.
- Increase the Indiana Office of Community and Rural Affairs Hometown Collaboration Initiative community participants by one in 2018. (2016 participants included: Perry, Orange and Spencer Counties)

Short Term:
- Review results of OCRA funded housing study
- Engage communities on specific housing policies
- Inventory existing health care resources
- Assist with FEMA AFG applications for emergency vehicles, equipment and training
- Prepare project application for new or enhanced public access site funding

Intermediate:
- Assist in projects that provide affordable housing within the Indiana 15 region. (Ferdinand-Benet Hall, Huntingburg-Stork Place, Jasper Cabinet)
- Inform public of Indiana 15 RPC as a regional resource
- Seek funding for emergency vehicles and equipment

Long Term:
- Place Indiana 15 as a “Resource Center” for the region’s public and stake holders
**Goal 4: Attract Tourists and Enhance Arts**

Promote a well-balanced utilization of the regions natural, historic and physical resources to preserve and protect the environment while maximizing its economic potential of Forest and Wood Product businesses, Agri-Business operations and Advanced Materials manufacturers.

**Regional Economic Benefits**

A regional marketing effort and filling tourism workforce needs will help increase the number of tourists and events. This will increase the economic benefit to local entrepreneurs and therefore our local economy.

<table>
<thead>
<tr>
<th>Actions/Activities</th>
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<th>Responsible Party</th>
<th>Measurements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Objective A: Increase regional marketing efforts with a unified approach.</strong></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>1) Research existing regional tourism marketing efforts</td>
<td>CVBs, state and regional tourism marketing groups</td>
<td>2016</td>
<td>In progress</td>
<td>Indiana Office of Tourism Development</td>
<td>Formation of regional organization and regular meetings</td>
</tr>
<tr>
<td>2) Convene and develop a regional hospitality training program</td>
<td>Ivy Tech, VUJC, hospitality businesses, CVBs</td>
<td>2016-2017</td>
<td>Development</td>
<td>Regional CVB directors</td>
<td>Longer stays and increased tourism</td>
</tr>
<tr>
<td>3) Form discussion groups for tourism, arts and entertainment topics</td>
<td>CVBs, chambers, arts associations, IDNR</td>
<td>2017</td>
<td>Development</td>
<td>Regional CVB directors</td>
<td>Formation and regular meeting of discussion groups</td>
</tr>
<tr>
<td>4) Identify regional tourist attractions</td>
<td>CVBs, chambers, Arts Associations, regional tourism groups</td>
<td>2016</td>
<td>Planning</td>
<td>Indiana 15 RPC</td>
<td>Regional map of tourism by 2017</td>
</tr>
<tr>
<td>5) Develop an interactive regional website to attract tourists</td>
<td>CVBs, chambers, regional tourism groups, state tourism, web developer</td>
<td>2018</td>
<td>Planning</td>
<td>Regional CVB directors</td>
<td>Web traffic to increase tourism by 20%</td>
</tr>
<tr>
<td>6) Market tourism opportunities to regional residents</td>
<td>CVBs, chambers, regional tourism groups</td>
<td>Ongoing</td>
<td>Planning</td>
<td>CVB/Chamber directors</td>
<td>Increase tourism by 20%</td>
</tr>
<tr>
<td>7) Create regional tourism packages</td>
<td>CVBs, chambers, regional tourism groups</td>
<td>2017</td>
<td>Development</td>
<td>Regional CVB directors</td>
<td>One regional package promoted annually</td>
</tr>
<tr>
<td>8) Develop a regional tourism brand</td>
<td>CVBs, regional tourism groups</td>
<td>2016-2018</td>
<td>Development</td>
<td>Regional CVB directors</td>
<td>Regional brand used in promotion</td>
</tr>
<tr>
<td>9) Develop and market trails – bike, hike, horseriding, motorcycle, jeeps</td>
<td>CVBs, regional tourism groups</td>
<td>Ongoing</td>
<td>Development</td>
<td>Regional CVB directors</td>
<td>Promotion of trails to each group mentioned</td>
</tr>
<tr>
<td><strong>Objective B: Investigate tourism workforce needs within the Indiana 15 region.</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Recruit businesses to fill leakages</td>
<td>CVBs, chambers, EDC</td>
<td>Ongoing</td>
<td>Development</td>
<td>CVB/Chamber directors, LEDOs</td>
<td>One business leakage firm lead contacted per year</td>
</tr>
<tr>
<td>2) Inventory workforce needs in tourism industry</td>
<td>CVBs, chambers, WorkOne</td>
<td>2017</td>
<td>Development</td>
<td>CVB/Chamber directors, LEDOs</td>
<td>List of workforce needs</td>
</tr>
</tbody>
</table>
Key Partners:
- Crawford County – CVB and Chamber
- Dubois County – CVB and Chamber
- Orange County – CVB and Chamber, West Baden CVB
- Perry County – CVB and Chamber
- Pike County – Tourism and Chamber
- Spencer County – CVB and Chamber, Holiday World marketing
- WorkOne

Target Outcomes:
- Increase regional tourism income by 10% by 2019.
- Establish a unified regional CVB board by 2018.

Short Term:
- Engage CVBs to discuss a regionally unified strategic approach to increase tourism income
- Inventory regional tourism assets for use in marketing materials
- Work with Indiana 15 counties to duplicate Perry County’s unified website approach (Chamber, Economic Development, Tourism, Government, Education, etc).

Intermediate:
- Implement the regional hospitality training program via stakeholder engagement

Long Term:
- Develop a regional brand and unified marketing strategy.

Evaluation Plan

Key Measures and Strategies to Track Progress:
The implementation status of this Regional Economic Development Plan will be an agenda item on the Indiana 15 Regional Planning Commission Board of Directors quarterly meeting. The goals, objectives and outcomes will also become part of the Comprehensive Economic Development Strategy reported to the Economic Development Administration.

Acknowledgements
The Indiana 15 Regional Planning Commission would like to thank the staff from the United States Department of Agriculture Rural Development, Regional Rural Development Centers, and Purdue Extension for support throughout the course of this project. We would also like to show our appreciation to Cash Waggner & Associates, Commonwealth Engineers, Midwestern Engineers, the distinguished individuals that took part in the training sessions, and numerous other individuals, for their invaluable insight and ideas that led to the creation of this plan.
Appendix

Appendix A – Planning Group Members

Crawford County – Bill Byrd – Retired Business owner/Indiana 15 RPC Board
Crawford County – Randy Gilmore – County Commissioner/Indiana 15 RPC Board
Crawford County – Linda Gilmore – Resident
Crawford County – Stephen Bartels – Business Owner/County Council/Indiana 15 RPC Board
Dubois County – Ashlee Sudbury – Purdue
Dubois County – Beverly Schultisse – Ferdinand Clerk-Treasurer/Indiana 15 RPC Board
Dubois County – Charmian Klem – County Council/Indiana 15 RPC Board
Dubois County – Courntey Knies – Youth
Dubois County – Dave Wylam – Resident
Dubois County – Debbie Johnson – Town Council
Dubois County – Doug Merkel – Utility
Dubois County – Drew Englert – Resident
Dubois County – Jan Dougan – Purdue
Dubois County – Gary Dougan – Resident
Dubois County – Larry Vollmer – County Commissioner/Indiana 15 RPC Board
Dubois County – Kenneth Eck – Purdue
Dubois County – Nancy Eckerle – Chamber of Commerce
Dubois County – Neil Elkins – Disadvantaged
Dubois County – Phil Ahrens – Resident
Dubois County – Terry Seitz – Mayor Jasper
Dubois County – Travis McQueen – Transportation
Orange County – Don Brewer – County Commissioner
Orange County – Imojean Dedrick – Community Foundation
Orange County – Cathy Hardin – Community Foundation
Orange County – Rudy Freeman – Farmer/Indiana 15 RPC Board
Orange County – Tanya Hall – Purdue
Perry County – Alvin Evans – Economic Development
Perry County – Erin Emerson – Economic Development
Perry County – Jeff Rogers – Manufacturing
Perry County – Jody French – Education/County Council
Perry County – Larry James – County Commissioner
Perry County – Lee Chestnut – Economic Development
Perry County – Mary Snyder – Mayor Cannelton
Perry County – Mary Roberson – Education/Youth
Perry County – Tara Damin – Women
Perry/Spencer/Dubois/Pike – Martin Vaught – OCRA
Pike County – Ashley Willis – Economic Development
Pike County – Jon Craig – Business
Pike County – Melissa Baxter – Disadvantaged
Spencer County – Al Logsdon – County Commissioner/Indiana 15 RPC Board
Spencer County – Jack Kroeger – County Council
Spencer County – Jeff Lindsey – Business Owner
Spencer County – John Bowen – Recreation/Santa Claus Town Council
Spencer County – Nick Held – Purdue
Spencer County – Tom Utter – Economic Development
Crawford/Dubois/Orange/Perry/Pike/Spencer – Lisa Gehlhausen – Indiana 15 RPC
Crawford/Dubois/Orange/Perry/Pike/Spencer – Nathan Held – Indiana 15 RPC
Crawford/Dubois/Orange/Perry/Pike/Spencer – Cheri Taylor – Indiana 15 RPC
Crawford/Dubois/Orange/Perry/Pike/Spencer – Terri Weyer – USDA
Crawford/Dubois/Orange/Perry/Pike/Spencer – Craig McGowan – USDA
Crawford/Dubois/Orange/Perry/Pike/Spencer – Deb Boudreau – USDA
Crawford/Dubois/Orange/Perry/Pike/Spencer – Wayne Dubble – USDA
Crawford/Dubois/Orange/Perry/Pike/Spencer – Mark Beckman – USDA
Crawford/Dubois/Orange/Perry/Pike/Spencer – Jim Heck – WorkOne
Crawford/Dubois/Orange/Perry/Pike/Spencer – Larry Ordner – Congressman Bucshon’s office
Crawford/Dubois/Orange/Perry/Pike/Spencer – Terri Weyer – USDA
Dubois/Pike/Spencer – Mark Messmer – State Senator
Dubois/Dubois/Orange/Perry/Pike/Spencer – Theresa Chriss-Hartwig – IARC
Crawford/Dubois/Orange/Perry/Pike/Spencer – Heather Strohm – Purdue
Bo Beaulieu – Purdue
November 29, 2016

Hiwot Gebremariam
1400 Independence Ave SW
Washington, DC 20250
hiwot.gebremariam@wdc.usda.gov

Rachel Welborn
Program Manager
Southern Rural Development Center
PO Box 9656
MS State, MS 39762
rachel.welborn@msstate.edu

Re: 2016 Stronger Economies Together Development Plan – Indiana 15 Regional Planning Commission

Dear Mr. Gebremariam and Ms. Welborn:

On behalf of Indiana 15 Regional Planning Commission we are pleased to commit to the Stronger Economies Together Regional Economic Development Plan. The 2016 SET Plan is being promoted throughout the region identifying the strategic focus for the region.

Indiana 15 Regional Planning Commission will utilize the SET Plan as an economic roadmap for its region. The SET process affects our strategies moving forward to focus collectively as a region. More emphasis is being placed upon the regional impact of projects, because of the data presented throughout the SET process.

We are planning a Summit to present the plan and continuing existing partnerships and forming new partnerships to achieve the actions within the SET Plan.

Sincerely,

Indiana 15 Regional Planning Commission

Lisa Gehlhausen
Executive Director
September 30, 2015

Indiana Office of Community and Rural Affairs
One North Capitol, Suite 600
Indianapolis, IN 46204

To Whom It May Concern:

On behalf of Waupaca Foundry, we’re honored to support the City of Tell City and the Perry County Business and Industrial Development Corporation in their efforts to obtain the Workforce Development Program grant.

Waupaca Foundry is proud to be the largest employer in Perry County, and to serve customers such as Ford, Chrysler, General Motors, Toyota, John Deere, ATTC, and Webb Wheel. We currently employ 985 employees, and continue to push for up to another 100 employees for our facility through our own hiring efforts and those of our contracted labor companies.

Many positions are becoming difficult to fill as we continue to add machines, automate equipment, and require skilled team members to work in our facility, which operates 24 hours a day, 7 days a week. There are openings for entry level production, skilled technicians, electricians, mechanics, etc. Despite our efforts to hire skilled employees, it has become more difficult to fill our open positions as of late.

Waupaca Foundry continues to push development and growth in its facilities and the Tell City facility is a prime location for expansion due to its location near major automotive machining and assembly facilities. This growth can only happen if there is an available skilled work force, and Waupaca would like to place new equipment and new jobs in the Tell City, IN facility in the next 5 years.

We look forward to continuing the partnership with the City of Tell City and the Perry County Business and Industrial Development Corporation to ensure that Indiana workers are better prepared for employment in today’s manufacturing fields.

Sincerely,

Cody Dawson

Cody Rhodes-Dawson
Assistant Plant Manager
Waupaca Foundry- Tell City
October 21, 2015

Indiana Office of Community and Rural Affairs
One North Capitol, Suite 600
Indianapolis, IN 46204

To Whom It May Concern:

I am writing this letter as an indication of our continued support for City of Tell City and the Perry County Business and Industrial Development Corporation in their efforts to obtain the Workforce Development Program grant.

Aisin-Takaoka Tell City (ATTC) has been in business in Tell City since 2000. We have experienced steady growth due to the workforce that has been available in Perry County. We have grown from 35 original Team Members to now over 500 through our Team Members and other contracted employment agencies. We provide various automotive parts, all machined at our site, to Toyota, Honda, and Nissan. As we continue to grow and add new customers, the challenge has been to find qualified candidates in our geographic area. We are currently seeking to fill 60 hourly positions and 12 salary positions. The qualifications for these positions range from semi-skilled to advanced skills.

The grant sought by the City of Tell City and the Perry County Business and Industrial Development Corporation is an integral part of our short and long term strategy to continue supplying our customers with world class quality parts and expanding our facility by adding lines and Team Members.

Thank you for your consideration in partnering and supporting Tell City and the Perry County Business and Industrial Development Corporation to ensure that Indiana residence are prepared to meet the increasing demand for manufacturing skills both now and in the coming years.

With Highest Regards,


Darren Rinehart
Assistant General Manager
Human Development Division
ATTC Manufacturing, Inc.
PARTNERSHIP AGREEMENT

Partner Name: Ivy Tech Community College
Contact person/title: Jonathan Weinzapfel, Chancellor Southwest/Wabash Valley Region
Mailing address: 3501 North First Avenue
City: Evansville Zip Code: 47710 County: Vanderburgh
Phone: 812-429-1410 Fax: Email Address: jdweinzapfel@ivytech.edu

Partner’s Legal Status (Check one):
___Not for profit ___Government Entity ___For-profit ___Education

Applicant’s Legal Status: X City □ Town □ County
Project Coordinator: Perry County Business and Industrial Development Corporation
Lee Chestnut, Vice President of Workforce Development
Mailing address: 601 Main Street, Suite A
City: Tell City Zip Code: 47586 County: Perry
Phone: 812-547-8377 Fax: 812-547-8378 Email Address: lee@pickperry.com

Improving and increasing the number of individuals entering the field of manufacturing is essential to meet the employment needs of the region’s manufacturers. Meeting this need is critical for the growth of the region in population, income and prosperity. A critical step in this process is informing future and current students of the tremendous manufacturing employment opportunities that exist in our region and preparing our students for these opportunities. Providing career information in this cooperative effort for vocational training will allow our students to see a continuous path for them to gain further knowledge and experiences that improve their ability to obtain the full employment jobs they desire.

It is recognized providing information on manufacturing career opportunities and the classes and assistance available to achieve these careers to those who are underemployed or unemployed can provide tremendous benefits to our students, families and community.

Participating in this program will allow residents to remain in the region to receive their training, therefore improving the likely hood they will remain here to live and work. Keeping our own is an imperative first step in reversing the outward migration of our population and meeting current and future needs of our manufacturing employers. Likewise a successful education and recruitment program should attract others to our area to learn, work and live.

We are proud to partner in this effort of educating and providing information to the unemployed and underemployed on the manufacturing careers that exist in the region and to participate in those activities determined by the region to accomplish this.

UPON SIGNING THIS REQUEST. I AM CERTIFYING THAT APPLICANT IS NOT IN VIOLATION OF ANY STATE OR FEDERAL LAW, OR MUNICIPAL ORDINANCES AS OF THIS DATE. NO MONEY IS DUE AND PAYABLE TO ANY MUNICIPAL, COUNTY, STATE OR U.S. GOVERNMENTAL AGENCY OR DEPARTMENT, NOR DOES THE APPLICANT HAVE LIENS OR POTENTIAL LIENS WHICH COULD JEOPARDIZE THE COMPLETION OF THIS PROJECT. ADDITIONALLY, THE IDENTIFIED ORGANIZATION CERTIFIES THAT IT IS AN ACTIVE PARTNER IN THE PROJECT AND WILL FULLFILL THE ROLE(S) IDENTIFIED ABOVE THROUGHOUT THE GRANT PERIOD.

Signature of Chief Official __________________________

Official’s Title CHANCELLOR

Date 10/15/15
October 16, 2015

Ms. Aletha Dunston, State Program Manager
Indiana Office of Community and Rural Affairs
One North Capitol, Suite 600
Indianapolis, Indiana 46204

Re: Tell City's Workforce Development Application

Ms. Dunston:

The Perry County Development Corporation is very supportive of this application for the workforce development training program (Program). The region's manufacturers are in desperate need of employees to meet their customer orders. Perry County's manufacturers are in need of approximately three hundred employees immediately and another one hundred plus employees if these are filled. Several manufacturer employers have commented of their opportunity to expand due to the location of their customers, but that expansion may occur elsewhere if the work force issue is not addressed. Perry County was very fortunate that during the 2008 recession three local national manufacturers consolidated facilities to Perry County rather than elsewhere due to location and work force. Today we have lost one of those advantages. Next time consolidation occurs the outcome may be much different.

As chairman of the Southwest Indiana Development Council (SWIDC), a regional economic development organization, the lack of employees is a problem throughout the region. Each county’s local economic development agency laments about the same lack of employees and qualified applicants to fill local jobs. The lack of qualified applicants for manufacturing jobs is a regional issue that must be solved regionally. The Program provided for in this application will involve those who can make a continuing effort in attacking this issue. Rather than marketing the region as most LEDOs do, the number one priority of SWIDC is to increase the work force in number and skill level.

Waupaca Foundry has approximately 50 less full time employees then approved for with the current work load. An additional 125 employees are approved for products that should be produced at Tell City due to customer location, but will be moved elsewhere if the employees cannot be found.

ATTCC is doing record production working with 55 less employees than approved for the 2 shifts they are working 24-6 and often the 7th day a week. They would like to go to 3 shifts to allow time off, but the 70 to 80 people to accomplish this cannot be found.
WGS Global Services is working 60 employees from an out of region temporary employee agency as they cannot find permanent workers to fill the positions. They have additional customers that are being sent elsewhere do to the lack of workers.

Another employer has current vacancies on their single shift. The company has a customer that can be best served out of the Perry County location. This requires an additional 80 employees to man the required second shift.

Perry County’s other four primary manufacturers have similar stories to tell. Similar or more dramatic stories exist in the region’s Dubois, Spencer and Crawford Counties, which the Program will address. The flow of employees is so great between these counties, the county lines are meaningless.

PCDC has been involved with workforce development since the early 2000’s when the manufacturing base was changing from wood manufacturing to heavy metal for the automotive, transportation and agricultural industries. This included working with the manufacturers in creating the Perry County Learning Partnership which worked with the companies, Ivy Tech Community College Tell City Learning Site and the counties 3 school corporations. This effort was successful to the 2008 recession when everyone pulled back their efforts.

As Perry County very successfully endured and came out of the recession the available employees began to diminish. 2013 saw the number of skilled applicants decrease, in 2014 the number of qualified applicants decreased and 2015 has seen the number of applicants decrease, as the unemployment level is hovering around 4% for the region. The recruitment efforts of the past are no longer working. One potential source is the unemployed (job seeking and not job seeking) and underemployed. This Program is to bring these individuals into the manufacturing employment population.

During 2013 and 2014, PCDC, as the lead organization, worked diligently with Ivy Tech, the City of Tell City and the community to preserve the Tell City Learning Site while Ivy Tech was going through their reorganization. This was successfully accomplished with Tell City providing free space at the facility Ivy Tech had been renting. Ivy Tech placed a new welding lab in the facility in 2014 and health care lab in early 2015. More effort is needed to address the lack of technology knowledge of the general populace so they are prepared to enter the manufacturing employment.

PCDC has worked diligently with the Tell City-Troy Township and Perry Central School Systems which have dramatically increased their technology offerings over the past few years through Conexus Indiana’s HIRE Technology and College Success Coalition. Both have been recognized for their efforts by these state organizations. Each has increased offerings of dual credits and technology career pathways and is working to educate students and their parents of these career opportunities. Ivy Tech has placed a career coach in Perry County working with high school students to identify and proceed toward a career path by selection of appropriate dual credits.
The partnership of the region’s schools is increased with this Program. The eight school systems in the region have signed as partners to encourage their students to look seriously at manufacturing as a career choice. This partnership is driven by several common objectives. There are the numerous unfilled career and job choices, above average rate of pay of manufacturing jobs, and the need to retain the region’s young people in order to grow the population and workforce.

Since 2013 Perry County schools and industry have cooperated with Manufacturing Month activities that include a day when employers open their doors to host students and an evening in which the HIRE technology students show what they have learned from visiting their host plants. 2015 had 8 companies and in excess of 125 people enjoy the evening of sharing what was learned and the usage of robots, 3D printer and trainers to learn of advance manufacturing. Vincennes University Jasper Center hosted a manufacturing day event that included all the region’s school districts and several of its manufacturers.

PCDC recognized diversity of the work force was necessary for the long-term success of the county and region. In 2014 it was determined a 501(c)3 organization was necessary to consolidate the available private support for such an effort. The Perry County Business and Industrial Development Corporation (PCBIDC) was founded to increase the diversity of the workforce through improving the quality and diversity of the infrastructure. The first project of this organization is to purchase the necessary training equipment and ensure this Program is successful and continues.

The necessary employment growth surpasses that which can be realized solely by bringing this Program and those graduating from the region’s high schools. Addressing this need will require population growth. Improving quality of place is not lost on the region. Each of the counties communities are working on improving health through numerous initiatives, including trails and wellness activities. PCDC has worked with the manufacturers and other companies that work 24-7 to create the Perry Childcare Initiative which on August 3, 2015 opened a 24-7 childcare facility with pre-school education. This facility is one of a few in the state of Indiana not tied directly to an employer. Other initiatives by the PCDC and its partners are occurring in development or planning to improve quality of place to attract and retain population.

Economic Development until recently was described as location, location, location which required a location close to customers and the infrastructure necessary to serve the industry. The region has addressed those issues by creating shortline railroads, regional water and sewer districts, moving millions of cubic yards of dirt for creation of industrial parks and sites, airport authorities and other efforts. As an example, Perry County is the only county/city port authority that operates a shortline railroad and river port. Today, the number one site selection criterion is workforce, workforce, workforce. This is a much harder problem to address, as the issues are much more difficult to define and develop effective strategies. Infrastructure is definable and quantifiable. Workforce development includes many more aspects and becomes much more emotional for the community and individuals.
Bringing the unemployed and underemployed into the manufacturing population is one step of the many being done in the region to accomplish the growth in manufacturing population. The identification of these individuals through Lincoln Hills Development Corporation, Indiana Region 15 Planning Agency, Southwest Indiana Workforce Development Agency (WorkOne), the employers who receive applications and the 8 school districts in the region will hopefully bring more individuals to exploring and accepting the manufacturing jobs. Each of these organizations can provide information on available jobs and the required skills and training to those they serve, students of the Program and their parents.

The Program provides the exposure and then the training to determine if aptitude and attitude of the person fits the jobs that exist. The Program will bring more people into manufacturing and reduce the costs of training to the manufacturers. All have spent considerable money on training new employees who then decide to not stay in manufacturing. ATTC in 2014 trained 320 new employees who left during or soon after the training was complete. In 2015 the number of 325 was passed at the end of September. This is a company with 400 employees and trying to fill the vacancies mentioned earlier.

This Program will increase manufacturing population, reduce training costs for employers and provide valuable training for the future new employees to increase their earning potential. The average annual income in Perry County is approximately $32,500 while the average manufacturing annual income is in excess of $62,000. The difference for the individual, communities and region are dramatic.

Respectfully,

Alvin C Evans
President and CEO

find your bottom line in Perry County
Lisa Gehlhausen, Executive Director
Indiana 15 Regional Planning Commission
221 E. First Street
Ferdinand, IN 47532

Dear Ms. Gehlhausen,

WorkOne Southwest hosted a job fair on November 1, 2016 at the office located at 703 W. Sixth Street in Jasper, Indiana. Companies represented were Jasper Engines and Transmissions, Kimball Electronics, Jasper Rubber, Indiana Furniture, and Best Home Furnishings. The first of its kind, the job fair saw success in number of attendees, 26 which surpassed the initial goal of 20 attendees. This turnout showed the need for connecting job seekers to employers face-to-face.

It is the intent of WorkOne Southwest to offer these job fairs on a regular monthly basis. Attendance will be a key indicator of the on-going need for such events. Another Job Fair is planned for December 6 and will include Jasper Engines and Transmissions, Memorial Hospital, Kimball International, Jasper Rubber, and Aerotek, the staffing agency for Stens.

To assist in the economic benefit to highlight quality open positions in the region, a goal of the Stronger Economies Together and Comprehensive Economic Development Strategy, WorkOne Southwest will report to the Commission the number of attendees at job fairs hosted by WorkOne Southwest.

WorkOne Southwest provides one-stop employment services to nine counties in Southern Indiana including: Dubois, Gibson, Knox, Perry, Pike, Posey, Spencer, Vanderburgh and Warrick Counties. Job Fairs and hiring events are held periodically in our full-service and satellite offices to assist both employers and job seekers in the region.

Sincerely,

[Signature]

Sara Huelsman
Business Services and Communication Manager
November 30, 2016

Lisa Gehlhausen, Executive Director
Indiana 15 Regional Planning Commission
221 E. First Street
Ferdinand, IN 47532

Dear Ms. Gehlhausen,

The Dubois County Visitors Center & Tourism Commission has "invited people to be our guests" since 1991. The Commission works toward showcasing our heritage, highlighting our family-oriented destinations, building cooperation with surrounding communities and spreading our welcoming spirit. The outcome sought is to enhance the social and economic growth of our area.

The Dubois County Visitors Center & Tourism Commission participated in the Stronger Economies Together Planning sessions with Indiana 15 Regional Planning Commission. An action item in the Stronger Economies Together is to attract tourists and enhance arts.

The Dubois County Visitors Center & Tourism Commission currently works toward this goal through the tourism pillar of Radius Indiana. Through this pillar, we partner with eight Indiana counties to create an interactive regional website highlighting our tourism attractions and trails. We are also working with Indiana Artisans program to enable our area visitor’s centers to sell their products.

The Commission also works with Southern Indiana Regional Marketing Cooperative (SIRMC) to promote regional tourism. This group covers 17 Indiana counties along the Interstate 64 corridor, including the Indiana 15 region. SIRMC received a matching grant that is currently being used to develop an interactive regional tourism map. As a member of SIRMC we also contribute to a regional tourism marketing effort.

We will continue to assist the region to increase the number of tourists and enhance arts.

Sincerely,

[Signature]

Kevin Manley, Executive Director
Dubois County Visitors Center and Tourism Commission

3704 Newton Street
Jasper, IN 47546
info@visitduboiscounty.com

visitduboiscounty.com

812.482.9115
800.968.4578
fax 812.482.2609
November 30, 2016

Lisa Gehlhausen, Executive Director
Indiana 15 Regional Planning Commission
221 E. First Street
Ferdinand, IN 47532

Dear Ms. Gehlhausen,

The Perry County Convention and Visitor’s Bureaus goal is to invite people “to experience life at your pace” in Perry County. The Commission works toward showcasing our local heritage, highlighting our tourist destinations and welcoming visitors our county. Our goal is to enhance the social and economic growth of our area.

The Perry County Convention and Visitor’s Bureau works with Southern Indiana Regional Marketing Cooperative (SIRMC) to promote regional tourism. This group covers 17 Indiana counties along the Interstate 64 corridor, including the Indiana 15 region. SIRMC received a matching grant that is currently being used to develop an interactive regional tourism map. As a member of SIRMC we also contribute to a regional tourism marketing effort.

The Commission also established an artisan gift shop in 2013 showcasing and selling wares from local artisans and craftsmen. The Commission added a two-county tourist train ride in 2016.

We will continue to assist the region in the goal of increasing the number of tourists and enhancing the arts.

Sincerely,

Betty Cash
Executive Director
November 30, 2016

Lisa Gehlhausen
Indiana 15 Regional Planning Commission
221 E. First Street
Ferdinand, IN 47532

Dear Ms. Gehlhausen,

Perry Central Community Schools work diligently to prepare students for all walks of life after high school. We understand the changing workforce and work closely with local manufacturers to make our students aware of the many local opportunities for employment, create meaningful internships, and adapt our high school curriculum to meet the skill sets needed locally.

Our teachers understand the value of internships, and we have created flexible scheduling options for students that make internships more feasible. Because of our powerful partnerships and creative scheduling, over 80% of our senior class is involved in a meaningful internship. We have an administrator who serves as a liaison with employers to provide support and evaluation to ensure that the internships meet the needs of both the students and the employer.

We worked with area employers to create a Work Ethic Certification program. This intensive program involves high standards of attendance and proof of proficiencies, as well as a curriculum component. Student certificates last year were signed by Governor Pence. We estimate that over 70% of the current senior class will complete the certification.

We provide the HIRE program in advanced manufacturing, as well as Project Lead the Way pre-engineering. We also offer Project Lead the Way biomedical and computer science.

In addition, we offer career and technical education classes in agriculture, welding, basic electricity, business, education, broadcasting, and graphic design. Our students participate in area programs and travel for pathways in automotive, health occupations, and building trades. Visitors marvel at the number of opportunities we offer our students as a small school. We believe that our students deserve the very best and are determined to work for creative solutions.

We are founding and active members of the Perry County College Success Coalition that offers events such as Manufacturing Night, Tour of Opportunity, and DREAM (a day-long event to encourage girls to enter non-traditional fields).

We are proud of the many opportunities our students have, but we know there is much work to be done. To this end, we appreciate the opportunity to participate in the Stronger Economies Together process and to help our region grow economically.

Sincerely,

Mary Roberson
Superintendent
Dear Ms. Gehlhausen,

TRI-CAP has been helping people and changing lives in southwestern Indiana since 1966. As a Community Action Agency, TRI-CAP is part of America's largest poverty fighting network. TRI-CAP is an independent, non-profit organization that provides valuable services and assistance to individuals and families, most of whom are low-income.

TRI-CAP empowers people in our communities to accept responsibility for achieving personal and economic well-being by providing health, housing, and educational services.

TRI-CAP provides early childhood education, day care, nutrition service, and medical, dental and mental health referrals for families. TRI-CAP also coordinates a Retired and Senior Volunteer Program such as distributing meals to strengthen communities through volunteering.

TRI-CAP participated in the Stronger Economies Together Planning sessions with Indiana 15 Regional Planning Commission. An action item in the Stronger Economies Together is to ensure efficient heating and cooling. TRI-CAP will continue to partner with the Indiana Housing and Community Development Authority and the area electric cooperatives by providing energy consultation, lighting retrofits, heating system replacements and/or repair, insulation and duct sealing. TRI-CAP will continue to educate and inform residents of opportunities for greater energy efficiency.

TRI-CAP is committed to increase safe and affordable housing. TRI-CAP has certified lead identification personnel. TRI-CAP is currently collaborating with Indiana 15 Regional Planning Commission to eliminate deteriorated housing from a flood plain area. TRI-CAP will also work to identify substandard housing units and rehabilitate structures to increase housing safety and comfort.

We will assist the region to increase the general well-being of individuals and families and collaborate for the betterment of health, safe housing options, and education.

Sincerely,

[Signature]

Lisa Gehlhausen, Executive Director
Indiana 15 Regional Planning Commission
221 E. First Street
Ferdinand, IN 47532
November 30, 2016

Lisa Gehlhausen
Indiana 15 Regional Planning Commission
221 E. First Street
Ferdinand, IN 47532

Dear Ms. Gehlhausen,

The Town of Chrisney is completing a half mile walking/bicycling path project by partnering with Indiana 15 Regional Planning Commission through a grant from the Division of Outdoor Recreation a grant application under the Recreational Trails Program (RTP).

This trail project consists of a new pedestrian and bicycling trail within the Chrisney Park. This path connects the shelter house area, playground area and the Chrisney Lake.

We appreciate the opportunity to aid us in reaching our goal of improving pedestrian and bicycling opportunities for the town and our visitors. We also envision adding to this trail to connect additional town gathering areas.

Sincerely,

TOWN OF CHRISNEY

[Signature]

Neal Dougan, President
Chrisney Town Council
December 7, 2016

Lisa Gehlhausen
Indiana 15 Regional Planning Commission
221 E. First Street
Ferdinand, IN 47532

Dear Ms. Gehlhausen,

The Ferdinand Park Board is interested in completing a walking path around the Old Town Lake in Ferdinand, Indiana. We wish to collaborate with Indiana 15 Regional Planning Commission in seeking a grant from the Indiana Department of Natural Resources, Division of Outdoor Recreation from the Land and Water Conservation Fund Program (LWCF). We also envision adding walkways to connect the 18th Street Park and 5th Street Park.

We appreciate support to aid in reaching our goal of improving pedestrian opportunities for the town and our visitors.

Sincerely,
FERDINAND PARK BOARD

Mike Steffe, President
## Appendix C – Regional Data

Table 1: 2010 Population in Indiana 15 Region, by County

<table>
<thead>
<tr>
<th></th>
<th>Crawford</th>
<th>Dubois</th>
<th>Orange</th>
<th>Perry</th>
<th>Pike</th>
<th>Spencer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990 Census</td>
<td>9,914</td>
<td>36,616</td>
<td>18,409</td>
<td>19,107</td>
<td>12,509</td>
<td>19,490</td>
</tr>
<tr>
<td>2000 Census</td>
<td>10,743</td>
<td>39,674</td>
<td>19,306</td>
<td>18,899</td>
<td>12,837</td>
<td>20,391</td>
</tr>
<tr>
<td>2010 Census</td>
<td>10,713</td>
<td>41,889</td>
<td>19,840</td>
<td>19,338</td>
<td>12,845</td>
<td>20,952</td>
</tr>
<tr>
<td>% of Change 1990-2010</td>
<td>7.46%</td>
<td>12.59%</td>
<td>7.21%</td>
<td>1.19%</td>
<td>2.62%</td>
<td>6.98%</td>
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</table>

### Regional % of Change 1990-2010

- **Regional:** 7.59%

### Indiana % of Change 1990-2010

- **Indiana:** 14.49%

### United States % of Change 1990-2010

- **United States:** 19.44%

---

Table 1: Population in Indiana 15 Region, by County

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Crawford</th>
<th>Dubois</th>
<th>Orange</th>
<th>Perry</th>
<th>Pike</th>
<th>Spencer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under Age 5</td>
<td>652</td>
<td>2,745</td>
<td>1,222</td>
<td>1,152</td>
<td>768</td>
<td>1,229</td>
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<tr>
<td>5 to 9 Years</td>
<td>686</td>
<td>2,906</td>
<td>1,302</td>
<td>1,157</td>
<td>769</td>
<td>1,387</td>
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<tr>
<td>10 to 14 Years</td>
<td>719</td>
<td>3,138</td>
<td>1,460</td>
<td>1,120</td>
<td>825</td>
<td>1,451</td>
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<tr>
<td>15 to 19 Years</td>
<td>718</td>
<td>2,779</td>
<td>1,404</td>
<td>1,163</td>
<td>821</td>
<td>1,490</td>
</tr>
<tr>
<td>20 to 24 Years</td>
<td>573</td>
<td>2,021</td>
<td>1,001</td>
<td>1,125</td>
<td>625</td>
<td>923</td>
</tr>
<tr>
<td>25 to 29 Years</td>
<td>517</td>
<td>2,445</td>
<td>1,045</td>
<td>1,303</td>
<td>680</td>
<td>1,090</td>
</tr>
<tr>
<td>30 to 34 Years</td>
<td>583</td>
<td>2,450</td>
<td>1,135</td>
<td>1,297</td>
<td>694</td>
<td>1,184</td>
</tr>
<tr>
<td>35 to 39 Years</td>
<td>681</td>
<td>2,512</td>
<td>1,168</td>
<td>1,248</td>
<td>790</td>
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<tr>
<td>40 to 44 Years</td>
<td>661</td>
<td>2,912</td>
<td>1,338</td>
<td>1,220</td>
<td>814</td>
<td>1,365</td>
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<td>45 to 49 Years</td>
<td>869</td>
<td>3,399</td>
<td>1,445</td>
<td>1,515</td>
<td>1,041</td>
<td>1,751</td>
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<td>50 to 54 Years</td>
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<td>956</td>
<td>1,567</td>
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<td>60 to 64 Years</td>
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<td>1,388</td>
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<td>65 to 69 Years</td>
<td>555</td>
<td>1,704</td>
<td>985</td>
<td>836</td>
<td>666</td>
<td>1,003</td>
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<td>70 to 74 Years</td>
<td>416</td>
<td>1,481</td>
<td>770</td>
<td>633</td>
<td>551</td>
<td>773</td>
</tr>
<tr>
<td>75 to 79 Years</td>
<td>278</td>
<td>1,082</td>
<td>589</td>
<td>557</td>
<td>422</td>
<td>575</td>
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<tr>
<td>80 to 84 Years</td>
<td>199</td>
<td>928</td>
<td>432</td>
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<td>437</td>
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<tr>
<td>85 Years +</td>
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<td>884</td>
<td>356</td>
<td>443</td>
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<td>Total Population</td>
<td>10,713</td>
<td>41,889</td>
<td>19,840</td>
<td>19,338</td>
<td>12,845</td>
<td>20,952</td>
</tr>
</tbody>
</table>

### % of Population Age 25 to 64 Years

- **Indiana:** 53.7%
- **United States:** 53.4%

### % of Population Age 65 Years +

- **Indiana:** 15.0%
- **United States:** 16.9%

---

- US Census Bureau (Decennial Census and American Community Survey)
### Table 1: Population in Indiana 15 Region, by Age and Sex (2010)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Male</th>
<th>Female</th>
<th>Male</th>
<th>Female</th>
<th>Male</th>
<th>Female</th>
<th>Male</th>
<th>Female</th>
<th>Male</th>
<th>Female</th>
<th>Male</th>
<th>Female</th>
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</thead>
<tbody>
<tr>
<td>Under Age 5</td>
<td>321</td>
<td>331</td>
<td>1,388</td>
<td>1,357</td>
<td>638</td>
<td>584</td>
<td>588</td>
<td>564</td>
<td>408</td>
<td>360</td>
<td>606</td>
<td>623</td>
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<tr>
<td>5 to 9 years</td>
<td>356</td>
<td>330</td>
<td>1,477</td>
<td>1,429</td>
<td>658</td>
<td>644</td>
<td>574</td>
<td>583</td>
<td>386</td>
<td>383</td>
<td>730</td>
<td>657</td>
</tr>
<tr>
<td>10 to 14 years</td>
<td>390</td>
<td>329</td>
<td>1,542</td>
<td>1,596</td>
<td>747</td>
<td>713</td>
<td>602</td>
<td>518</td>
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<td>422</td>
<td>728</td>
<td>723</td>
</tr>
<tr>
<td>15 to 19 years</td>
<td>350</td>
<td>368</td>
<td>1,363</td>
<td>1,416</td>
<td>722</td>
<td>682</td>
<td>633</td>
<td>530</td>
<td>421</td>
<td>400</td>
<td>776</td>
<td>714</td>
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<tr>
<td>20 to 24 years</td>
<td>291</td>
<td>282</td>
<td>1,042</td>
<td>979</td>
<td>531</td>
<td>470</td>
<td>673</td>
<td>452</td>
<td>339</td>
<td>286</td>
<td>477</td>
<td>446</td>
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<td>25 to 29 years</td>
<td>262</td>
<td>255</td>
<td>1,250</td>
<td>1,195</td>
<td>516</td>
<td>529</td>
<td>785</td>
<td>518</td>
<td>350</td>
<td>330</td>
<td>577</td>
<td>513</td>
</tr>
<tr>
<td>30 to 34 years</td>
<td>297</td>
<td>286</td>
<td>1,281</td>
<td>1,169</td>
<td>554</td>
<td>581</td>
<td>786</td>
<td>511</td>
<td>344</td>
<td>350</td>
<td>591</td>
<td>593</td>
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<tr>
<td>35 to 39 years</td>
<td>340</td>
<td>341</td>
<td>1,284</td>
<td>1,228</td>
<td>598</td>
<td>570</td>
<td>709</td>
<td>539</td>
<td>400</td>
<td>390</td>
<td>616</td>
<td>623</td>
</tr>
<tr>
<td>40 to 44 years</td>
<td>355</td>
<td>306</td>
<td>1,481</td>
<td>1,431</td>
<td>670</td>
<td>668</td>
<td>696</td>
<td>524</td>
<td>441</td>
<td>373</td>
<td>709</td>
<td>656</td>
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<tr>
<td>45 to 49 years</td>
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<td>709</td>
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<td>695</td>
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<td>522</td>
<td>880</td>
<td>871</td>
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<tr>
<td>50 to 54 years</td>
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<td>416</td>
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<td>787</td>
<td>791</td>
<td>802</td>
<td>745</td>
<td>540</td>
<td>519</td>
<td>889</td>
<td>854</td>
</tr>
<tr>
<td>55 to 59 years</td>
<td>434</td>
<td>391</td>
<td>1,426</td>
<td>1,417</td>
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<td>642</td>
<td>701</td>
<td>638</td>
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<td>60 to 64 years</td>
<td>389</td>
<td>363</td>
<td>1,146</td>
<td>1,166</td>
<td>603</td>
<td>668</td>
<td>627</td>
<td>590</td>
<td>412</td>
<td>416</td>
<td>708</td>
<td>680</td>
</tr>
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<td>398</td>
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<tr>
<td>70 to 74 years</td>
<td>219</td>
<td>197</td>
<td>687</td>
<td>794</td>
<td>380</td>
<td>390</td>
<td>307</td>
<td>326</td>
<td>258</td>
<td>293</td>
<td>383</td>
<td>690</td>
</tr>
<tr>
<td>75 to 79 years</td>
<td>117</td>
<td>161</td>
<td>441</td>
<td>641</td>
<td>266</td>
<td>323</td>
<td>237</td>
<td>320</td>
<td>195</td>
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<td>313</td>
</tr>
<tr>
<td>80 to 84 years</td>
<td>84</td>
<td>115</td>
<td>339</td>
<td>589</td>
<td>163</td>
<td>269</td>
<td>175</td>
<td>291</td>
<td>120</td>
<td>171</td>
<td>170</td>
<td>267</td>
</tr>
<tr>
<td>85+ years</td>
<td>59</td>
<td>101</td>
<td>259</td>
<td>625</td>
<td>117</td>
<td>239</td>
<td>136</td>
<td>307</td>
<td>64</td>
<td>181</td>
<td>140</td>
<td>217</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>5,436</td>
<td>5,277</td>
<td>20,625</td>
<td>21,264</td>
<td>9,861</td>
<td>9,979</td>
<td>10,249</td>
<td>9,089</td>
<td>6,419</td>
<td>6,426</td>
<td>10,542</td>
<td>10,710</td>
</tr>
</tbody>
</table>

- US Census Bureau (Decennial Census and American Community Survey)

### Chart 1: Per Capita Personal Income (2010-2014)

![Chart](chart.png)

- stats.indiana.edu
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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<th></th>
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<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Purdue: Forest And Wood Products</td>
<td>3,612</td>
<td>4,009</td>
<td>1</td>
<td>12%</td>
<td>1</td>
<td>$47,198,039</td>
<td>1</td>
<td>$3,632,222</td>
<td>13</td>
<td>50%</td>
<td>245</td>
<td>62</td>
<td>367</td>
<td>6.3%</td>
<td>9.5%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Purdue: Primary Metal Mfg</td>
<td>1,045</td>
<td>1,294</td>
<td>12</td>
<td>24%</td>
<td>6</td>
<td>$35,201,970</td>
<td>9</td>
<td>$2,735,034</td>
<td>10</td>
<td>231</td>
<td>249</td>
<td>72</td>
<td>190</td>
<td>7.8%</td>
<td>8.5%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Purdue: Transportation Equipment Mfg</td>
<td>1,448</td>
<td>1,937</td>
<td>9</td>
<td>34%</td>
<td>8</td>
<td>$115,223,370</td>
<td>8</td>
<td>$2,579,900</td>
<td>10</td>
<td>459</td>
<td>196</td>
<td>53</td>
<td>255</td>
<td>7.5%</td>
<td>12%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Purdue: Apparel And Textiles</td>
<td>1,039</td>
<td>1,338</td>
<td>10</td>
<td>23%</td>
<td>14</td>
<td>$43,749,117</td>
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<td>$3,477,471</td>
<td>5</td>
<td>320</td>
<td>200</td>
<td>57</td>
<td>293</td>
<td>2.0%</td>
<td>2.6%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Purdue: Apparel, Food Processing And Technology</td>
<td>6,920</td>
<td>5,217</td>
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<td>-23%</td>
<td>4</td>
<td>$204,314,446</td>
<td>4</td>
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<td>12</td>
<td>292</td>
<td>12</td>
<td>316</td>
<td>114</td>
<td>24</td>
<td>2.4</td>
</tr>
<tr>
<td>Purdue: Glass And Ceramics</td>
<td>81</td>
<td>279</td>
<td>21</td>
<td>242%</td>
<td>21</td>
<td>$4,762,300</td>
<td>21</td>
<td>$1,050,099</td>
<td>6</td>
<td>177</td>
<td>34</td>
<td>5</td>
<td>192</td>
<td>0.7%</td>
<td>2.5%</td>
<td>230%</td>
<td></td>
</tr>
<tr>
<td>Purdue: Chemicals</td>
<td>1,032</td>
<td>1,485</td>
<td>16</td>
<td>44%</td>
<td>12</td>
<td>$56,090,414</td>
<td>12</td>
<td>$2,373,637</td>
<td>8</td>
<td>452</td>
<td>33</td>
<td>17</td>
<td>421</td>
<td>1.3%</td>
<td>1.6%</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>Purdue: Advanced Materials</td>
<td>2,666</td>
<td>3,626</td>
<td>6</td>
<td>27%</td>
<td>3</td>
<td>$23,661,079</td>
<td>3</td>
<td>$6,185,386</td>
<td>4</td>
<td>215</td>
<td>166</td>
<td>15</td>
<td>318</td>
<td>1.4%</td>
<td>1.9%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Purdue: Mining</td>
<td>34.5</td>
<td>314</td>
<td>19</td>
<td>15%</td>
<td>16</td>
<td>$22,964,134</td>
<td>16</td>
<td>$3,081,281</td>
<td>16</td>
<td>41</td>
<td>60</td>
<td>171</td>
<td>114</td>
<td>1.8%</td>
<td>39%</td>
<td>46%</td>
<td></td>
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<tr>
<td>Purdue: Computer &amp; Electronic Product Mfg</td>
<td>7.5</td>
<td>557</td>
<td>174</td>
<td>244%</td>
<td>15</td>
<td>$14,600,477</td>
<td>15</td>
<td>$7,367,1</td>
<td>1</td>
<td>$46,050,477</td>
<td>1</td>
<td>173</td>
<td>100</td>
<td>47</td>
<td>54</td>
<td>118</td>
<td>1.6</td>
</tr>
<tr>
<td>Purdue: Arts, Entertainment, Recreation And Visitor Industries</td>
<td>3,749</td>
<td>3,797</td>
<td>4</td>
<td>1%</td>
<td>10</td>
<td>$39,256,781</td>
<td>10</td>
<td>$12,768</td>
<td>88</td>
<td>$1,022,704</td>
<td>19</td>
<td>48</td>
<td>111</td>
<td>241</td>
<td>312</td>
<td>(304)</td>
<td>1.4</td>
</tr>
<tr>
<td>Purdue: Transportation And Logistics</td>
<td>23,200</td>
<td>24,497</td>
<td>6</td>
<td>8%</td>
<td>7</td>
<td>$47,129,205</td>
<td>7</td>
<td>$3,839,293</td>
<td>141</td>
<td>$1,047,523</td>
<td>30</td>
<td>177</td>
<td>82</td>
<td>249</td>
<td>197</td>
<td>39%</td>
<td>1.2</td>
</tr>
<tr>
<td>Purdue: Fabricated Metal Product Mfg</td>
<td>3,469</td>
<td>569</td>
<td>16</td>
<td>63%</td>
<td>16</td>
<td>$25,517,261</td>
<td>16</td>
<td>$5,187,830</td>
<td>28</td>
<td>$1,372,859</td>
<td>16</td>
<td>220</td>
<td>17</td>
<td>22</td>
<td>40</td>
<td>286</td>
<td>0.9</td>
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<tr>
<td>Purdue: Energy (Fossil And Renewables)</td>
<td>4,128</td>
<td>3,772</td>
<td>5</td>
<td>(2%)</td>
<td>2</td>
<td>$40,366,033</td>
<td>2</td>
<td>$6,515,096</td>
<td>256</td>
<td>$1,040,170</td>
<td>17</td>
<td>(246)</td>
<td>144</td>
<td>265</td>
<td>43</td>
<td>(686)</td>
<td>1.1</td>
</tr>
<tr>
<td>Purdue: Machinery Mfg</td>
<td>371</td>
<td>361</td>
<td>20</td>
<td>(2%)</td>
<td>19</td>
<td>$3,059,978</td>
<td>19</td>
<td>$184,299</td>
<td>9</td>
<td>251</td>
<td>225</td>
<td>26</td>
<td>252</td>
<td>2.0%</td>
<td>2.6%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Purdue: Biomedical/Biotechnical (Life Sciences)</td>
<td>4,419</td>
<td>4,067</td>
<td>3</td>
<td>(6%)</td>
<td>5</td>
<td>$19,234,676</td>
<td>5</td>
<td>$184,452</td>
<td>102</td>
<td>$1,923,609</td>
<td>13</td>
<td>(382)</td>
<td>35</td>
<td>284</td>
<td>39</td>
<td>(671)</td>
<td>0.7</td>
</tr>
<tr>
<td>Purdue: Printing And Publishing</td>
<td>764</td>
<td>675</td>
<td>15</td>
<td>(20%)</td>
<td>17</td>
<td>$2,585,225</td>
<td>17</td>
<td>$140,370</td>
<td>10</td>
<td>97</td>
<td>81</td>
<td>12</td>
<td>137</td>
<td>0.7%</td>
<td>36%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Purdue: Defense And Security</td>
<td>1,318</td>
<td>1,405</td>
<td>11</td>
<td>(6%)</td>
<td>13</td>
<td>$18,920,208</td>
<td>13</td>
<td>$1,404,305</td>
<td>12</td>
<td>12</td>
<td>112</td>
<td>9</td>
<td>104</td>
<td>0.7%</td>
<td>19%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Purdue: Information Technology And Telecommunications</td>
<td>1,396</td>
<td>1,733</td>
<td>14</td>
<td>(30%)</td>
<td>11</td>
<td>$88,225,134</td>
<td>11</td>
<td>$7,278,747</td>
<td>51</td>
<td>$1,721,409</td>
<td>14</td>
<td>(186)</td>
<td>(13)</td>
<td>79</td>
<td>78</td>
<td>(268)</td>
<td>0.9</td>
</tr>
<tr>
<td>Purdue: Business And Financial Services</td>
<td>4,423</td>
<td>3,941</td>
<td>7</td>
<td>(12%)</td>
<td>6</td>
<td>$173,866,441</td>
<td>6</td>
<td>$51,000</td>
<td>268</td>
<td>$491,921</td>
<td>22</td>
<td>(265)</td>
<td>52</td>
<td>220</td>
<td>275</td>
<td>(485)</td>
<td>0.4</td>
</tr>
<tr>
<td>Purdue: Education And Knowledge Creation</td>
<td>3,151</td>
<td>481</td>
<td>18</td>
<td>(17%)</td>
<td>20</td>
<td>$1,672,311</td>
<td>20</td>
<td>$3,064,200</td>
<td>21</td>
<td>$865,357</td>
<td>21</td>
<td>(381)</td>
<td>30</td>
<td>33</td>
<td>33</td>
<td>(686)</td>
<td>0.3</td>
</tr>
<tr>
<td>Purdue: Electrical Equip, Appliance &amp; Component Mfg</td>
<td>3</td>
<td>31</td>
<td>22</td>
<td>1012%</td>
<td>22</td>
<td>$2,640,646</td>
<td>22</td>
<td>$80,838</td>
<td>1</td>
<td>$2,640,646</td>
<td>9</td>
<td>30</td>
<td>0</td>
<td>0</td>
<td>30</td>
<td>0.0</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

NOTE: Orange denotes clusters under consideration by IN15

### Appendix D - Industry Cluster Data

<table>
<thead>
<tr>
<th>KEY</th>
<th>Top 10</th>
<th>Top 10</th>
<th>Top 10</th>
<th>+ Change</th>
<th>Above Median</th>
<th>Top 11</th>
<th>Above Median</th>
<th>Above Median</th>
<th>Top 11</th>
<th>+ Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td>2.072</td>
<td>2.167</td>
<td>$110,110,408</td>
<td>$54,790</td>
<td>62</td>
<td>$5,133,070</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median</td>
<td>1.223</td>
<td>1.371</td>
<td>$78,157,974</td>
<td>$52,415</td>
<td>28</td>
<td>$2,102,850</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Table of contents

01 Overview
02 Target Industry Clusters
03 Industry Cluster Comparison
01 overview

Indiana 15 RPC Region, Indiana
Overview

Indiana 15 RPC Region

The Indiana 15 Regional Planning Commission Region is comprised of six Indiana counties. I-64 passes through the central part of the region connecting to I-55 to the west and I-65 to the east.

- Crawford
- Dubois
- Orange
- Perry
- Pike
- Spencer
target industry clusters

- Forest and Wood Products
- Primary Metal Manufacturing
- Transportation Equipment Manufacturing
- Agribusiness, Food Processing and Technology
- Advanced Materials
Regional Job Growth: Three Key Components of the Shift-Share Analysis

Expected Change
The sum of the industrial mix and the national growth effects

National Growth Effect
Explains how much of the regional industry’s growth is explained by the overall growth of the national economy

Industrial Mix Effect
Share of regional industry growth explained by the growth of the specific industry sector at the national level

Regional Competitive Effect
Explains how much of the change in a given industry is due to some unique competitive advantage that the region possesses

Note: The calculations ensure no double counting of job change effects from national to regional levels

Source: EMSI website: http://www.economicmodeling.com/2011/12/05/understanding-shift-share-2/
### Shift-Share Analysis (Regional Performance) by Top Industry Sectors

**Forest and Wood Products**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Wood Office Furniture Manufacturing</td>
<td>2,990</td>
<td>177</td>
<td>-292</td>
<td>-115</td>
<td>234</td>
<td>349</td>
</tr>
<tr>
<td>Wood Kitchen Cabinet and Countertop Manufacturing</td>
<td>2,496</td>
<td>144</td>
<td>-250</td>
<td>-106</td>
<td>260</td>
<td>366</td>
</tr>
<tr>
<td>Upholstered Household Furniture Manufacturing</td>
<td>1,075</td>
<td>60</td>
<td>-5</td>
<td>55</td>
<td>140</td>
<td>85</td>
</tr>
<tr>
<td>Showcase, Partition, Shelving, and Locker Manufacturing</td>
<td>460</td>
<td>37</td>
<td>-65</td>
<td>-28</td>
<td>-119</td>
<td>-91</td>
</tr>
<tr>
<td>Institutional Furniture Manufacturing</td>
<td>392</td>
<td>16</td>
<td>-27</td>
<td>-11</td>
<td>145</td>
<td>156</td>
</tr>
<tr>
<td>Nonupholstered Wood Household Furniture Manufacturing</td>
<td>355</td>
<td>40</td>
<td>-113</td>
<td>-73</td>
<td>-266</td>
<td>-193</td>
</tr>
<tr>
<td>Furniture Merchant Wholesalers</td>
<td>327</td>
<td>24</td>
<td>6</td>
<td>30</td>
<td>-41</td>
<td>-71</td>
</tr>
<tr>
<td>Sawmills</td>
<td>239</td>
<td>12</td>
<td>2</td>
<td>14</td>
<td>45</td>
<td>31</td>
</tr>
<tr>
<td>Logging</td>
<td>162</td>
<td>12</td>
<td>22</td>
<td>34</td>
<td>-30</td>
<td>-64</td>
</tr>
<tr>
<td>Sawmill, Woodworking, and Paper Machinery Manufacturing</td>
<td>128</td>
<td>11</td>
<td>-7</td>
<td>4</td>
<td>-50</td>
<td>-54</td>
</tr>
<tr>
<td>Corrugated and Solid Fiber Box Manufacturing</td>
<td>108</td>
<td>8</td>
<td>-14</td>
<td>-6</td>
<td>-20</td>
<td>-14</td>
</tr>
<tr>
<td>Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers</td>
<td>99</td>
<td>7</td>
<td>-11</td>
<td>-4</td>
<td>-12</td>
<td>-8</td>
</tr>
<tr>
<td>Finish Carpentry Contractors</td>
<td>88</td>
<td>7</td>
<td>-9</td>
<td>-2</td>
<td>-15</td>
<td>-13</td>
</tr>
<tr>
<td>Cut Stock, Resawing Lumber, and Planing</td>
<td>83</td>
<td>5</td>
<td>1</td>
<td>6</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Roofing Contractors</td>
<td>72</td>
<td>5</td>
<td>-2</td>
<td>3</td>
<td>-5</td>
<td>-8</td>
</tr>
</tbody>
</table>

Note: Upward arrow (↑) indicates regional competitiveness.

**Source:** EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
Shift-Share Analysis

Regional Performance: Forest and Wood Products

Industries that Outperformed

- Wood Office Furniture Manufacturing
- Wood Kitchen Cabinet and Countertop Manufacturing
- Upholstered Household Furniture Manufacturing
- Institutional Furniture Manufacturing
- Sawmills
- Cut Stock, Resawing Lumber, and Planing

Industries that Underperformed

- Showcase, Partition, Shelving, and Locker Manufacturing
- Nonupholstered Wood Household Furniture Manufacturing
- Furniture Merchant Wholesalers
- Logging
- Sawmill, Woodworking, and Paper Machinery Manufacturing
- Corrugated and Solid Fiber Box Manufacturing
- Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers
- Finish Carpentry Contractors
- Roofing Contractors

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors).
## Top Industry Sectors

### Forest and Wood Products

<table>
<thead>
<tr>
<th>Industries</th>
<th>Exports 2013 ($ Millions)</th>
<th>Jobs 2013</th>
<th>Export per job 2013 ($)</th>
<th>LQ 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wood Office Furniture Manufacturing</td>
<td>$571.8</td>
<td>3,032</td>
<td>$188,593</td>
<td>435.0</td>
</tr>
<tr>
<td>Wood Kitchen Cabinet and Countertop Manufacturing</td>
<td>$348.7</td>
<td>2,235</td>
<td>$156,048</td>
<td>53.8</td>
</tr>
<tr>
<td>Upholstered Household Furniture Manufacturing</td>
<td>$200.5</td>
<td>1,024</td>
<td>$195,701</td>
<td>49.5</td>
</tr>
<tr>
<td>Showcase, Partition, Shelving, and Locker Manufacturing</td>
<td>$54.6</td>
<td>495</td>
<td>$110,285</td>
<td>26.2</td>
</tr>
<tr>
<td>Institutional Furniture Manufacturing</td>
<td>$75.3</td>
<td>415</td>
<td>$181,240</td>
<td>45.8</td>
</tr>
<tr>
<td>Nonupholstered Wood Household Furniture Manufacturing</td>
<td>$52.2</td>
<td>422</td>
<td>$123,719</td>
<td>21.7</td>
</tr>
<tr>
<td>Furniture Merchant Wholesalers</td>
<td>$53.0</td>
<td>298</td>
<td>$178,291</td>
<td>16.4</td>
</tr>
<tr>
<td>Sawmills</td>
<td>$20.7</td>
<td>248</td>
<td>$83,187</td>
<td>7.0</td>
</tr>
<tr>
<td>Logging</td>
<td>$11.8</td>
<td>166</td>
<td>$71,272</td>
<td>3.5</td>
</tr>
<tr>
<td>Sawmill, Woodworking, and Paper Machinery Manufacturing</td>
<td>$24.8</td>
<td>136</td>
<td>$182,664</td>
<td>22.8</td>
</tr>
<tr>
<td>Corrugated and Solid Fiber Box Manufacturing</td>
<td>$24.3</td>
<td>107</td>
<td>$226,809</td>
<td>3.2</td>
</tr>
<tr>
<td>Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers</td>
<td>$5.4</td>
<td>81</td>
<td>$65,999</td>
<td>2.6</td>
</tr>
<tr>
<td>Finish Carpentry Contractors</td>
<td>$1.3</td>
<td>81</td>
<td>$15,748</td>
<td>0.6</td>
</tr>
<tr>
<td>Cut Stock, Resawing Lumber, and Planing</td>
<td>$9.2</td>
<td>80</td>
<td>$115,462</td>
<td>13.6</td>
</tr>
<tr>
<td>Roofing Contractors</td>
<td>$2.9</td>
<td>70</td>
<td>$41,435</td>
<td>0.8</td>
</tr>
</tbody>
</table>

Note: Sorted similarly as the shift-share analysis slide.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Top 15 Inputs by Dollars

**Forest and Wood Products**

<table>
<thead>
<tr>
<th>Industries</th>
<th>Estimated Input ($ Millions), 2013</th>
<th>% In-Region</th>
<th>% Out of Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sawmills</td>
<td>$52.16</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>Corporate, Subsidiary, and Regional Managing Offices</td>
<td>$36.45</td>
<td>7%</td>
<td>93%</td>
</tr>
<tr>
<td>Wood Kitchen Cabinet and Countertop Manufacturing</td>
<td>$30.24</td>
<td>67%</td>
<td>33%</td>
</tr>
<tr>
<td>Iron and Steel Mills and Ferroalloy Manufacturing</td>
<td>$27.72</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Truss Manufacturing</td>
<td>$19.81</td>
<td>1%</td>
<td>99%</td>
</tr>
<tr>
<td>Wholesale Trade Agents and Brokers</td>
<td>$18.20</td>
<td>6%</td>
<td>94%</td>
</tr>
<tr>
<td>Urethane and Other Foam Product (except Polystyrene) Manufacturing</td>
<td>$18.05</td>
<td>21%</td>
<td>79%</td>
</tr>
<tr>
<td>Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing **</td>
<td>$17.71</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Showcase, Partition, Shelving, and Locker Manufacturing</td>
<td>$17.62</td>
<td>39%</td>
<td>61%</td>
</tr>
<tr>
<td>Paint and Coating Manufacturing</td>
<td>$16.46</td>
<td>1%</td>
<td>99%</td>
</tr>
<tr>
<td>All Other Plastics Product Manufacturing</td>
<td>$16.16</td>
<td>2%</td>
<td>98%</td>
</tr>
<tr>
<td>Reconstituted Wood Product Manufacturing</td>
<td>$16.08</td>
<td>37%</td>
<td>63%</td>
</tr>
<tr>
<td>Softwood Veneer and Plywood Manufacturing **</td>
<td>$14.65</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Hardwood Veneer and Plywood Manufacturing</td>
<td>$14.11</td>
<td>52%</td>
<td>48%</td>
</tr>
<tr>
<td>Corrugated and Solid Fiber Box Manufacturing</td>
<td>$11.81</td>
<td>8%</td>
<td>92%</td>
</tr>
</tbody>
</table>

Note: ** industry sector is not present in the region. EMSI shows <10 jobs in iron and steel mills and ferroalloy manufacturing.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
Top 15 Inputs by Dollars

Forest and Wood Products

Leakage Analysis, 2013

- Sawmills
- Corporate, Subsidiary, and Regional Managing Offices
- Wood Kitchen Cabinet and Countertop Manufacturing
- Iron and Steel Mills and Ferroalloy Manufacturing
- Truss Manufacturing
- Wholesale Trade Agents and Brokers
- Urethane and Other Foam Product (except Polystyrene), and...
- Laminated Plastics Plate, Sheet (except Packaging), and...
- Showcase, Partition, Shelving, and Locker Manufacturing
- Paint and Coating Manufacturing
- All Other Plastics Product Manufacturing
- Reconstituted Wood Product Manufacturing
- Softwood Veneer and Plywood Manufacturing
- Hardwood Veneer and Plywood Manufacturing
- Corrugated and Solid Fiber Box Manufacturing

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
# Top Occupations

## Forest and Wood Products

<table>
<thead>
<tr>
<th>Occupations</th>
<th>Jobs 2014</th>
<th>% Change, 2009-2014</th>
<th>Median Hourly Earnings</th>
<th>Entry Level Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cabinetmakers and Bench Carpenters</td>
<td>1,037</td>
<td>6%</td>
<td>$13.5</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Team Assemblers</td>
<td>959</td>
<td>2%</td>
<td>$12.0</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Woodworking Machine Setters, Operators, and Tenders, Except Sawing</td>
<td>951</td>
<td>6%</td>
<td>$13.4</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Furniture Finishers</td>
<td>498</td>
<td>8%</td>
<td>$13.5</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>First-Line Supervisors of Production and Operating Workers</td>
<td>328</td>
<td>3%</td>
<td>$23.7</td>
<td>Postsecondary non-degree award</td>
</tr>
<tr>
<td>Laborers and Freight, Stock, and Material Movers, Hand</td>
<td>293</td>
<td>3%</td>
<td>$13.2</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Carpenters</td>
<td>259</td>
<td>3%</td>
<td>$14.1</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products</td>
<td>234</td>
<td>-4%</td>
<td>$21.3</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Helpers–Production Workers</td>
<td>190</td>
<td>4%</td>
<td>$12.8</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Sawing Machine Setters, Operators, and Tenders, Wood</td>
<td>181</td>
<td>11%</td>
<td>$13.9</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Upholsterers</td>
<td>174</td>
<td>2%</td>
<td>$13.6</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic</td>
<td>169</td>
<td>-1%</td>
<td>$12.8</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Welders, Cutters, Solderers, and Brazers</td>
<td>161</td>
<td>0%</td>
<td>$15.9</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Industrial Truck and Tractor Operators</td>
<td>151</td>
<td>1%</td>
<td>$15.2</td>
<td>Less than high school</td>
</tr>
<tr>
<td>General and Operations Managers</td>
<td>151</td>
<td>2%</td>
<td>$31.6</td>
<td>Bachelor's degree</td>
</tr>
</tbody>
</table>

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
### Shift-Share Analysis (Regional Performance) by Top Industry Sectors

#### Primary Metal Manufacturing

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Iron Foundries</td>
<td>947</td>
<td>45</td>
<td>-23</td>
<td>22</td>
<td>246</td>
<td>224</td>
</tr>
<tr>
<td>Rolled Steel Shape Manufacturing</td>
<td>277</td>
<td>19</td>
<td>4</td>
<td>23</td>
<td>-19</td>
<td>-42</td>
</tr>
<tr>
<td>Aluminum Foundries (except Die-Casting)</td>
<td>67</td>
<td>3</td>
<td>1</td>
<td>4</td>
<td>19</td>
<td>15</td>
</tr>
</tbody>
</table>

**Note:** Upward arrow (↑) indicates regional competitiveness. EMSI does not show any jobs for the following sectors: Iron and Steel Mills and Ferroalloy Manufacturing (<10); Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum); Steel Investment Foundries; Nonferrous Metal Die-Casting Foundries; Other Nonferrous Metal Foundries (except Die-Casting); Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding Steel Foundries (except Investment); Nonferrous Metal (except Aluminum) Smelting and Refining; Steel Wire Drawing; Iron and Steel Pipe and Tube Manufacturing from Purchased Steel; Alumina Refining and Primary Aluminum Production; and Secondary Smelting and Alloying of Aluminum.
Shift-Share Analysis

Regional Performance: Primary Metal Manufacturing

**Industries that Outperformed**

- Iron Foundries
- Aluminum Foundries (except Die-Casting)

**Industries that Underperformed**

- Rolled Steel Shape Manufacturing

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
# Top Industry Sectors

## Primary Metal Manufacturing

<table>
<thead>
<tr>
<th>Industries</th>
<th>Exports 2013 ($ Millions)</th>
<th>Jobs 2013</th>
<th>Export per job 2013 ($)</th>
<th>LQ 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iron Foundries</td>
<td>$258.1</td>
<td>846</td>
<td>$305,191</td>
<td>61.3</td>
</tr>
<tr>
<td>Rolled Steel Shape Manufacturing</td>
<td>$165.4</td>
<td>287</td>
<td>$576,229</td>
<td>34.4</td>
</tr>
<tr>
<td>Aluminum Foundries (except Die-Casting)</td>
<td>$13.2</td>
<td>59</td>
<td>$225,702</td>
<td>10.1</td>
</tr>
</tbody>
</table>

Note: Sorted similarly as the shift-share analysis slide.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Top 15 Inputs by Dollars
### Primary Metal Manufacturing

<table>
<thead>
<tr>
<th>Industries</th>
<th>Estimated Input ($ Millions), 2013</th>
<th>% In-Region</th>
<th>% Out of Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iron and Steel Mills and Ferroalloy Manufacturing</td>
<td>$72.27</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Corporate, Subsidiary, and Regional Managing Offices</td>
<td>$19.34</td>
<td>1%</td>
<td>99%</td>
</tr>
<tr>
<td>Iron and Steel Pipe and Tube Manufacturing from Purchased Steel **</td>
<td>$6.90</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Rolled Steel Shape Manufacturing</td>
<td>$5.70</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Machine Shops</td>
<td>$5.64</td>
<td>4%</td>
<td>96%</td>
</tr>
<tr>
<td>Wholesale Trade Agents and Brokers</td>
<td>$4.94</td>
<td>4%</td>
<td>96%</td>
</tr>
<tr>
<td>Rail transportation</td>
<td>$4.89</td>
<td>16%</td>
<td>84%</td>
</tr>
<tr>
<td>Nonferrous Metal (except Aluminum) Smelting and Refining **</td>
<td>$4.26</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>General Freight Trucking, Long-Distance, Truckload</td>
<td>$3.32</td>
<td>19%</td>
<td>81%</td>
</tr>
<tr>
<td>Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding **</td>
<td>$3.17</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Natural Gas Distribution</td>
<td>$2.54</td>
<td>41%</td>
<td>59%</td>
</tr>
<tr>
<td>Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum) **</td>
<td>$2.41</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Steel Wire Drawing **</td>
<td>$2.14</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Data Processing, Hosting, and Related Services</td>
<td>$2.02</td>
<td>12%</td>
<td>88%</td>
</tr>
<tr>
<td>Electric Power Distribution</td>
<td>$1.99</td>
<td>32%</td>
<td>68%</td>
</tr>
</tbody>
</table>

Note: ** industry sector is not present in the region.
EMSI shows <10 jobs in iron and steel mills and ferroalloy manufacturing.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
Top 15 Inputs by Dollars

Primary Metal Manufacturing

Leakage Analysis, 2013

Iron and Steel Mills and Ferroalloy Manufacturing
Corporate, Subsidiary, and Regional Managing Offices
Iron and Steel Pipe and Tube Manufacturing from Purchased Steel
Rolled Steel Shape Manufacturing
Machine Shops
Wholesale Trade Agents and Brokers
Rail transportation
Nonferrous Metal (except Aluminum) Smelting and Refining
General Freight Trucking, Long-Distance, Truckload
Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing,
Natural Gas Distribution
Secondary Smelting, Refining, and Alloying of Nonferrous Metals
Steel Wire Drawing
Data Processing, Hosting, and Related Services
Electric Power Distribution

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors).
## Top Occupations
### Primary Metal Manufacturing

<table>
<thead>
<tr>
<th>Occupations</th>
<th>Jobs 2014</th>
<th>% Change, 2009-2014</th>
<th>Median Hourly Earnings</th>
<th>Entry Level Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic</td>
<td>79</td>
<td>27%</td>
<td>$16.8</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Team Assemblers</td>
<td>71</td>
<td>37%</td>
<td>$12.0</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Inspectors, Testers, Sorters, Samplers, and Weighers</td>
<td>63</td>
<td>29%</td>
<td>$16.0</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Grinding and Polishing Workers, Hand</td>
<td>53</td>
<td>43%</td>
<td>$12.6</td>
<td>Less than high school</td>
</tr>
<tr>
<td>First-Line Supervisors of Production and Operating Workers</td>
<td>53</td>
<td>26%</td>
<td>$23.7</td>
<td>Postsecondary non-degree award</td>
</tr>
<tr>
<td>Welders, Cutters, Solderers, and Brazers</td>
<td>52</td>
<td>21%</td>
<td>$15.9</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Industrial Machinery Mechanics</td>
<td>50</td>
<td>43%</td>
<td>$20.6</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic</td>
<td>47</td>
<td>24%</td>
<td>$13.8</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Foundry Mold and Coremakers</td>
<td>47</td>
<td>21%</td>
<td>$13.3</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Machinists</td>
<td>40</td>
<td>29%</td>
<td>$17.6</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic</td>
<td>38</td>
<td>9%</td>
<td>$12.8</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Maintenance and Repair Workers, General</td>
<td>36</td>
<td>29%</td>
<td>$17.5</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Computer-Controlled Machine Tool Operators, Metal and Plastic</td>
<td>34</td>
<td>42%</td>
<td>$14.5</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Industrial Truck and Tractor Operators</td>
<td>33</td>
<td>22%</td>
<td>$15.2</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Helpers—Production Workers</td>
<td>31</td>
<td>19%</td>
<td>$12.8</td>
<td>Less than high school</td>
</tr>
</tbody>
</table>

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self-employment, proprietorships, trusts, partnerships and cooperatives.

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors).
### Shift-Share Analysis (Regional Performance) by Top Industry Sectors

**Transportation Equipment Manufacturing**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor Vehicle Transmission and Power Train Parts Manufacturing</td>
<td>1,176</td>
<td>50</td>
<td>282</td>
<td>332</td>
<td>401</td>
<td>69</td>
</tr>
<tr>
<td>Motor Vehicle Brake System Manufacturing</td>
<td>598</td>
<td>30</td>
<td>-29</td>
<td>1</td>
<td>137</td>
<td>136</td>
</tr>
<tr>
<td>Ship Building and Repairing</td>
<td>127</td>
<td>13</td>
<td>-10</td>
<td>3</td>
<td>-74</td>
<td>-77</td>
</tr>
<tr>
<td>Other Motor Vehicle Parts Manufacturing</td>
<td>28</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>24</td>
<td>23</td>
</tr>
</tbody>
</table>

Note: Upward arrow (↑) indicates regional competitiveness. EMSI shows <10 jobs for the following sectors: Travel Trailer and Camper Manufacturing; Motor Vehicle Electrical and Electronic Equipment Manufacturing; Motor Vehicle Gasoline Engine and Engine Parts Manufacturing; All Other Transportation Equipment Manufacturing. EMSI does not show any jobs for the following sectors: Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing; Guided Missile and Space Vehicle Manufacturing; Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing; Military Armored Vehicle, Tank, and Tank Component Manufacturing; Boat Building; Railroad Rolling Stock Manufacturing; and Motorcycle, Bicycle, and Parts Manufacturing.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
Shift-Share Analysis
Regional Performance: Transportation Equipment Mfg.

Industries that Outperformed

- Motor Vehicle Transmission and Power Train Parts Manufacturing
- Motor Vehicle Brake System Manufacturing
- Other Motor Vehicle Parts Manufacturing

Industries that Underperformed

- Ship Building and Repairing

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Top Industry Sectors

### Transportation Equipment Manufacturing

<table>
<thead>
<tr>
<th>Industries</th>
<th>Exports 2013 ($ Millions)</th>
<th>Jobs 2013</th>
<th>Export per job 2013 ($)</th>
<th>LQ 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor Vehicle Transmission and Power Train Parts Manufacturing</td>
<td>$379.9</td>
<td>1,099</td>
<td>$345,803</td>
<td>40.7</td>
</tr>
<tr>
<td>Motor Vehicle Brake System Manufacturing</td>
<td>$209.9</td>
<td>544</td>
<td>$385,832</td>
<td>64.2</td>
</tr>
<tr>
<td>Ship Building and Repairing</td>
<td>$40.6</td>
<td>194</td>
<td>$208,983</td>
<td>3.2</td>
</tr>
<tr>
<td>Other Motor Vehicle Parts Manufacturing</td>
<td>$3.9</td>
<td>-</td>
<td>-</td>
<td>0.5</td>
</tr>
</tbody>
</table>

Note: Sorted similarly as the shift-share analysis slide. EMSI does not include detailed job information for Other Motor Vehicle Parts Manufacturing in 2013.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Top 15 Inputs by Dollars

### Transportation Equipment Manufacturing

<table>
<thead>
<tr>
<th>Industries</th>
<th>Estimated Input ($ Millions), 2013</th>
<th>% In-Region</th>
<th>% Out of Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate, Subsidiary, and Regional Managing Offices</td>
<td>$65.16</td>
<td>4%</td>
<td>96%</td>
</tr>
<tr>
<td>Custom Roll Forming **</td>
<td>$23.35</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Iron and Steel Mills and Ferroalloy Manufacturing</td>
<td>$18.25</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Machine Shops</td>
<td>$17.81</td>
<td>3%</td>
<td>97%</td>
</tr>
<tr>
<td>Motor Vehicle Metal Stamping **</td>
<td>$16.96</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Iron Foundries</td>
<td>$14.59</td>
<td>39%</td>
<td>61%</td>
</tr>
<tr>
<td>Nonferrous Metal Die-Casting Foundries **</td>
<td>$10.68</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Aluminum Foundries (except Die-Casting)</td>
<td>$7.09</td>
<td>3%</td>
<td>97%</td>
</tr>
<tr>
<td>Wholesale Trade Agents and Brokers</td>
<td>$6.86</td>
<td>5%</td>
<td>95%</td>
</tr>
<tr>
<td>Bolt, Nut, Screw, Rivet, and Washer Manufacturing **</td>
<td>$6.24</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Other Nonferrous Metal Foundries (except Die-Casting)</td>
<td>$6.23</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Steel Foundries (except Investment) **</td>
<td>$6.17</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Lessors of Nonfinancial Intangible Assets (except</td>
<td>$6.09</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Copyrighted Works) **</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Precision Turned Product Manufacturing</td>
<td>$5.58</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Electroplating, Plating, Polishing, Anodizing, and</td>
<td>$4.88</td>
<td>12%</td>
<td>88%</td>
</tr>
<tr>
<td>Coloring</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: ** industry sector is not present in the region.

EMSI shows <10 jobs for Iron and Steel Mills and Ferroalloy and Precision Turned Product Manufacturing.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
Top 15 Inputs by Dollars
Transportation Equipment Manufacturing

Leakage Analysis, 2013

Corporate, Subsidiary, and Regional Managing Offices
Custom Roll Forming
Iron and Steel Mills and Ferroalloy Manufacturing
Machine Shops
Motor Vehicle Metal Stamping
Iron Foundries
Nonferrous Metal Die-Casting Foundries
Aluminum Foundries (except Die-Casting)
Wholesale Trade Agents and Brokers
Bolt, Nut, Screw, Rivet, and Washer Manufacturing
Other Nonferrous Metal Foundries (except Die-Casting)
Steel Foundries (except Investment)
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)
Precision Turned Product Manufacturing
Electroplating, Plating, Polishing, Anodizing, and Coloring

$0.0  $17.0  $34.0  $51.0  $68.0

$ Millions

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Top Occupations

### Transportation Equipment Manufacturing

<table>
<thead>
<tr>
<th>Occupations</th>
<th>Jobs 2014</th>
<th>% Change, 2009-2014</th>
<th>Median Hourly Earnings</th>
<th>Entry Level Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Assemblers</td>
<td>425</td>
<td>49%</td>
<td>$12.0</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Electrical and Electronic Equipment Assemblers</td>
<td>100</td>
<td>64%</td>
<td>$11.1</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Engine and Other Machine Assemblers</td>
<td>94</td>
<td>65%</td>
<td>$13.5</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Welders, Cutters, Solderers, and Brazers</td>
<td>67</td>
<td>5%</td>
<td>$15.9</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic</td>
<td>64</td>
<td>36%</td>
<td>$12.8</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Computer-Controlled Machine Tool Operators, Metal and Plastic</td>
<td>56</td>
<td>51%</td>
<td>$14.5</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>First-Line Supervisors of Production and Operating Workers</td>
<td>56</td>
<td>22%</td>
<td>$23.7</td>
<td>Postsecondary non-degree award</td>
</tr>
<tr>
<td>Inspectors, Testers, Sorters, Samplers, and Weighers</td>
<td>55</td>
<td>38%</td>
<td>$16.0</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Machinists</td>
<td>55</td>
<td>34%</td>
<td>$17.6</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Mechanical Engineers</td>
<td>48</td>
<td>30%</td>
<td>$37.0</td>
<td>Bachelor's degree</td>
</tr>
<tr>
<td>Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders</td>
<td>48</td>
<td>55%</td>
<td>$15.9</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Tool and Die Makers</td>
<td>41</td>
<td>41%</td>
<td>$22.6</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Laborers and Freight, Stock, and Material Movers, Hand</td>
<td>37</td>
<td>28%</td>
<td>$13.2</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Industrial Truck and Tractor Operators</td>
<td>37</td>
<td>42%</td>
<td>$15.2</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Industrial Engineers</td>
<td>36</td>
<td>33%</td>
<td>$29.7</td>
<td>Bachelor's degree</td>
</tr>
</tbody>
</table>

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors).
## Shift-Share Analysis (Regional Performance) by Top Industry Sectors

### Agribusiness, Food Processing and Technology

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Production and Aquaculture</td>
<td>2,165</td>
<td>129</td>
<td>-184</td>
<td>55</td>
<td>161</td>
<td>216</td>
</tr>
<tr>
<td>Poultry Processing</td>
<td>911</td>
<td>49</td>
<td>-68</td>
<td>-19</td>
<td>146</td>
<td>165</td>
</tr>
<tr>
<td>Crop Production</td>
<td>888</td>
<td>62</td>
<td>-46</td>
<td>16</td>
<td>-73</td>
<td>-89</td>
</tr>
<tr>
<td>Farm and Garden Machinery and Equipment Wholesalers</td>
<td>515</td>
<td>26</td>
<td>-3</td>
<td>23</td>
<td>111</td>
<td>88</td>
</tr>
<tr>
<td>Fluid Milk Manufacturing</td>
<td>156</td>
<td>10</td>
<td>-14</td>
<td>-4</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Farm Supplies Merchant Wholesalers</td>
<td>94</td>
<td>10</td>
<td>0</td>
<td>10</td>
<td>-53</td>
<td>-63</td>
</tr>
<tr>
<td>Other Animal Food Manufacturing</td>
<td>85</td>
<td>4</td>
<td>-1</td>
<td>3</td>
<td>28</td>
<td>25</td>
</tr>
<tr>
<td>Farm Labor Contractors and Crew Leaders</td>
<td>81</td>
<td>6</td>
<td>4</td>
<td>10</td>
<td>-4</td>
<td>-14</td>
</tr>
<tr>
<td>Meat Processed from Carcasses</td>
<td>69</td>
<td>6</td>
<td>-1</td>
<td>5</td>
<td>-32</td>
<td>-37</td>
</tr>
<tr>
<td>Wineries</td>
<td>65</td>
<td>3</td>
<td>11</td>
<td>14</td>
<td>18</td>
<td>4</td>
</tr>
<tr>
<td>Soil Preparation, Planting, and Cultivating</td>
<td>38</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>All Other Miscellaneous Food Manufacturing</td>
<td>37</td>
<td>6</td>
<td>17</td>
<td>23</td>
<td>-62</td>
<td>-85</td>
</tr>
<tr>
<td>Cheese Manufacturing</td>
<td>25</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Dog and Cat Food Manufacturing</td>
<td>11</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Ice Manufacturing</td>
<td>11</td>
<td>1</td>
<td>-1</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

Note: Upward arrow (↑) indicates regional competitiveness.
Shift-Share Analysis

Regional Performance: Agribusiness, Food Proc. and Tech.

Industries that Outperformed

• Animal Production and Aquaculture
• Poultry Processing
• Farm and Garden Machinery and Equipment Merchant Wholesalers
• Fluid Milk Manufacturing
• Other Animal Food Manufacturing
• Wineries
• Soil Preparation, Planting, and Cultivating
• Cheese Manufacturing
• Dog and Cat Food Manufacturing
• Ice Manufacturing

Industries that Underperformed

• Crop Production
• Farm Supplies Merchant Wholesalers
• Farm Labor Contractors and Crew Leaders
• Meat Processed from Carcasses
• All Other Miscellaneous Food Manufacturing

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
### Top Industry Sectors

**Agribusiness, Food Processing and Technology**

<table>
<thead>
<tr>
<th>Industries</th>
<th>Exports 2013 ($ Millions)</th>
<th>Jobs 2013</th>
<th>Export per job 2013 ($)</th>
<th>LQ 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Production and Aquaculture</td>
<td>$349.7</td>
<td>2,127</td>
<td>$164,433</td>
<td>5.0</td>
</tr>
<tr>
<td>Poultry Processing</td>
<td>$202.5</td>
<td>837</td>
<td>$242,058</td>
<td>10.9</td>
</tr>
<tr>
<td>Crop Production</td>
<td>$106.3</td>
<td>876</td>
<td>$121,364</td>
<td>1.6</td>
</tr>
<tr>
<td>Farm and Garden Machinery and Equipment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merchant Wholesalers</td>
<td>$86.8</td>
<td>513</td>
<td>$169,436</td>
<td>12.8</td>
</tr>
<tr>
<td>Fluid Milk Manufacturing</td>
<td>$112.3</td>
<td>131</td>
<td>$859,511</td>
<td>7.8</td>
</tr>
<tr>
<td>Farm Supplies Merchant Wholesalers</td>
<td>$11.4</td>
<td>102</td>
<td>$111,881</td>
<td>2.1</td>
</tr>
<tr>
<td>Other Animal Food Manufacturing</td>
<td>$69.3</td>
<td>68</td>
<td>$1,013,587</td>
<td>6.6</td>
</tr>
<tr>
<td>Farm Labor Contractors and Crew Leaders</td>
<td>$0.2</td>
<td>81</td>
<td>$2,290</td>
<td>0.7</td>
</tr>
<tr>
<td>Meat Processed from Carcasses</td>
<td>$56.9</td>
<td>101</td>
<td>$561,878</td>
<td>1.6</td>
</tr>
<tr>
<td>Wineries</td>
<td>$9.6</td>
<td>65</td>
<td>$148,255</td>
<td>2.7</td>
</tr>
<tr>
<td>Soil Preparation, Planting, and Cultivating</td>
<td>$0.5</td>
<td>37</td>
<td>$12,446</td>
<td>1.4</td>
</tr>
<tr>
<td>All Other Miscellaneous Food Manufacturing</td>
<td>$22.3</td>
<td>82</td>
<td>$273,977</td>
<td>2.8</td>
</tr>
<tr>
<td>Cheese Manufacturing</td>
<td>$0.9</td>
<td>-</td>
<td>-</td>
<td>1.5</td>
</tr>
<tr>
<td>Dog and Cat Food Manufacturing</td>
<td>$11.4</td>
<td>-</td>
<td>-</td>
<td>1.3</td>
</tr>
<tr>
<td>Ice Manufacturing</td>
<td>$2.2</td>
<td>12</td>
<td>$185,149</td>
<td>3.6</td>
</tr>
</tbody>
</table>

**Note:** Sorted similarly as the shift-share analysis slide. EMSI does not include detailed job information for Cheese Manufacturing and Dog and Cat Food Manufacturing in 2013.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Top 15 Inputs by Dollars

### Agribusiness, Food Processing and Technology

<table>
<thead>
<tr>
<th>Industries</th>
<th>Estimated Input ($ Millions), 2013</th>
<th>% In-Region</th>
<th>% Out of Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Production and Aquaculture</td>
<td>$245.69</td>
<td>6%</td>
<td>94%</td>
</tr>
<tr>
<td>Crop Production</td>
<td>$50.97</td>
<td>8%</td>
<td>92%</td>
</tr>
<tr>
<td>Other Animal Food Manufacturing</td>
<td>$49.25</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>Poultry Processing</td>
<td>$32.11</td>
<td>94%</td>
<td>6%</td>
</tr>
<tr>
<td>Corporate, Subsidiary, and Regional Managing Offices</td>
<td>$22.24</td>
<td>7%</td>
<td>93%</td>
</tr>
<tr>
<td>Wholesale Trade Agents and Brokers</td>
<td>$12.38</td>
<td>6%</td>
<td>94%</td>
</tr>
<tr>
<td>General Freight Trucking, Long-Distance, Truckload</td>
<td>$11.63</td>
<td>26%</td>
<td>74%</td>
</tr>
<tr>
<td>Fluid Milk Manufacturing</td>
<td>$11.36</td>
<td>44%</td>
<td>56%</td>
</tr>
<tr>
<td>Animal (except Poultry) Slaughtering</td>
<td>$10.37</td>
<td>2%</td>
<td>98%</td>
</tr>
<tr>
<td>Meat Processed from Carcasses</td>
<td>$9.28</td>
<td>23%</td>
<td>77%</td>
</tr>
<tr>
<td>Soybean and Other Oilseed Processing **</td>
<td>$5.99</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>General Freight Trucking, Local</td>
<td>$5.45</td>
<td>28%</td>
<td>72%</td>
</tr>
<tr>
<td>Rail transportation</td>
<td>$5.27</td>
<td>19%</td>
<td>81%</td>
</tr>
<tr>
<td>General Freight Trucking, Long-Distance, Less Than Truckload</td>
<td>$4.91</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Farm Labor Contractors and Crew Leaders</td>
<td>$4.53</td>
<td>26%</td>
<td>74%</td>
</tr>
</tbody>
</table>

Note: ** industry sector is not present in the region.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Top Occupations

### Agribusiness, Food Processing and Technology

<table>
<thead>
<tr>
<th>Occupations</th>
<th>Jobs 2014</th>
<th>% Change, 2009-2014</th>
<th>Median Hourly Earnings</th>
<th>Entry Level Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farmers, Ranchers, and Other Agricultural Managers</td>
<td>2,321</td>
<td>-5%</td>
<td>$13.1</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Farmworkers and Laborers, Crop, Nursery, and Greenhouse</td>
<td>424</td>
<td>40%</td>
<td>$10.2</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Meat, Poultry, and Fish Cutters and Trimmers</td>
<td>277</td>
<td>14%</td>
<td>$12.8</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Packaging and Filling Machine Operators and Tenders</td>
<td>123</td>
<td>15%</td>
<td>$12.2</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Sales Representatives, Wholesale and Manufacturing, Except</td>
<td>119</td>
<td>14%</td>
<td>$21.3</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Meat, Poultry, and Fish Cutters and Trimmers</td>
<td>277</td>
<td>14%</td>
<td>$12.8</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Packers and Packagers, Hand</td>
<td>108</td>
<td>9%</td>
<td>$9.0</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Laborers and Freight, Stock, and Material Movers, Hand</td>
<td>98</td>
<td>7%</td>
<td>$13.2</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Farm Equipment Mechanics and Service Technicians</td>
<td>75</td>
<td>17%</td>
<td>$18.8</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Industrial Truck and Tractor Operators</td>
<td>56</td>
<td>12%</td>
<td>$15.2</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Industrial Machinery Mechanics</td>
<td>54</td>
<td>32%</td>
<td>$20.6</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Heavy and Tractor-Trailer Truck Drivers</td>
<td>53</td>
<td>15%</td>
<td>$17.2</td>
<td>Postsecondary non-degree award</td>
</tr>
<tr>
<td>Maintenance and Repair Workers, General</td>
<td>52</td>
<td>18%</td>
<td>$17.5</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>First-Line Supervisors of Production and Operating Workers</td>
<td>47</td>
<td>12%</td>
<td>$23.7</td>
<td>Postsecondary non-degree award</td>
</tr>
<tr>
<td>Helpers–Production Workers</td>
<td>47</td>
<td>12%</td>
<td>$12.8</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Bookkeeping, Accounting, and Auditing Clerks</td>
<td>47</td>
<td>7%</td>
<td>$15.7</td>
<td>High school diploma or equivalent</td>
</tr>
</tbody>
</table>

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Shift-Share Analysis (Regional Performance) by Top Industry Sectors
### Advanced Materials

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Iron Foundries</td>
<td>947</td>
<td>45</td>
<td>-23</td>
<td>22</td>
<td>246</td>
<td>224</td>
</tr>
<tr>
<td>Rubber Product Manufacturing for Mechanical Use</td>
<td>830</td>
<td>33</td>
<td>70</td>
<td>103</td>
<td>323</td>
<td>220</td>
</tr>
<tr>
<td>Printed Circuit Assembly (Electronic Assembly) Manufacturing</td>
<td>552</td>
<td>47</td>
<td>11</td>
<td>58</td>
<td>-172</td>
<td>-230</td>
</tr>
<tr>
<td>Rolled Steel Shape Manufacturing</td>
<td>277</td>
<td>19</td>
<td>4</td>
<td>23</td>
<td>-19</td>
<td>-42</td>
</tr>
<tr>
<td>Electroplating, Plating, Polishing, Anodizing, and Coloring</td>
<td>231</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>231</td>
<td>231</td>
</tr>
<tr>
<td>All Other Plastics Product Manufacturing</td>
<td>135</td>
<td>6</td>
<td>2</td>
<td>8</td>
<td>37</td>
<td>29</td>
</tr>
<tr>
<td>Machine Shops</td>
<td>122</td>
<td>6</td>
<td>13</td>
<td>19</td>
<td>37</td>
<td>18</td>
</tr>
<tr>
<td>Cutting Tool and Machine Tool Accessory Manufacturing</td>
<td>96</td>
<td>5</td>
<td>13</td>
<td>18</td>
<td>26</td>
<td>8</td>
</tr>
<tr>
<td>All Other Miscellaneous Fabricated Metal Product Manufacturing</td>
<td>94</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>57</td>
<td>54</td>
</tr>
<tr>
<td>Urethane and Other Foam Product (except Polystyrene) Manufacturing</td>
<td>87</td>
<td>3</td>
<td>2</td>
<td>5</td>
<td>35</td>
<td>30</td>
</tr>
<tr>
<td>Aluminum Foundries (except Die-Casting)</td>
<td>67</td>
<td>3</td>
<td>1</td>
<td>4</td>
<td>19</td>
<td>15</td>
</tr>
<tr>
<td>Plate Work Manufacturing</td>
<td>49</td>
<td>4</td>
<td>3</td>
<td>7</td>
<td>-17</td>
<td>-24</td>
</tr>
<tr>
<td>Clay Building Material and Refractories Manufacturing</td>
<td>36</td>
<td>2</td>
<td>-3</td>
<td>(1)</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Other Motor Vehicle Parts Manufacturing</td>
<td>28</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>24</td>
<td>23</td>
</tr>
</tbody>
</table>

Note: Upward arrow (↑) indicates regional competitiveness.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
Shift-Share Analysis

Regional Performance: Advanced Materials

**Industries that Outperformed**

- Iron Foundries
- Rubber Product Manufacturing for Mechanical Use
- Electroplating, Plating, Polishing, Anodizing, and Coloring
- All Other Plastics Product Manufacturing
- Machine Shops
- Cutting Tool and Machine Tool Accessory Manufacturing
- All Other Miscellaneous Fabricated Metal Product Manufacturing
- Urethane and Other Foam Product (except Polystyrene) Manufacturing
- Aluminum Foundries (except Die-Casting)
- Clay Building Material and Refractories Manufacturing
- Other Motor Vehicle Parts Manufacturing

**Industries that Underperformed**

- Printed Circuit Assembly (Electronic Assembly) Manufacturing
- Rolled Steel Shape Manufacturing
- Plate Work Manufacturing

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Top Industry Sectors

### Advanced Materials

<table>
<thead>
<tr>
<th>Industries</th>
<th>Exports 2013 ($ Millions)</th>
<th>Jobs 2013</th>
<th>Export per job 2013 ($)</th>
<th>LQ 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iron Foundries</td>
<td>$258.1</td>
<td>846</td>
<td>$305,191</td>
<td>61.3</td>
</tr>
<tr>
<td>Rubber Product Manufacturing for Mechanical Use</td>
<td>$141.7</td>
<td>722</td>
<td>$196,216</td>
<td>74.2</td>
</tr>
<tr>
<td>Printed Circuit Assembly (Electronic Assembly) Manufacturing</td>
<td>$229.6</td>
<td>621</td>
<td>$369,596</td>
<td>27.3</td>
</tr>
<tr>
<td>Rolled Steel Shape Manufacturing</td>
<td>$165.4</td>
<td>287</td>
<td>$576,229</td>
<td>34.4</td>
</tr>
<tr>
<td>Electroplating, Plating, Polishing, Anodizing, and Coloring</td>
<td>$26.9</td>
<td>207</td>
<td>$129,725</td>
<td>9.5</td>
</tr>
<tr>
<td>All Other Plastics Product Manufacturing</td>
<td>$48.7</td>
<td>119</td>
<td>$407,960</td>
<td>1.3</td>
</tr>
<tr>
<td>Machine Shops</td>
<td>$14.2</td>
<td>107</td>
<td>$133,502</td>
<td>1.0</td>
</tr>
<tr>
<td>Cutting Tool and Machine Tool Accessory Manufacturing</td>
<td>$16.0</td>
<td>75</td>
<td>$212,327</td>
<td>8.4</td>
</tr>
<tr>
<td>All Other Miscellaneous Fabricated Metal Product Manufacturing</td>
<td>$15.2</td>
<td>91</td>
<td>$166,018</td>
<td>3.1</td>
</tr>
<tr>
<td>Urethane and Other Foam Product (except Polystyrene) Manufacturing</td>
<td>$25.8</td>
<td>77</td>
<td>$335,560</td>
<td>7.0</td>
</tr>
<tr>
<td>Aluminum Foundries (except Die-Casting)</td>
<td>$13.2</td>
<td>59</td>
<td>$225,702</td>
<td>10.1</td>
</tr>
<tr>
<td>Plate Work Manufacturing</td>
<td>$14.8</td>
<td>61</td>
<td>$242,644</td>
<td>2.6</td>
</tr>
<tr>
<td>Clay Building Material and Refractories Manufacturing</td>
<td>$4.1</td>
<td>24</td>
<td>$174,149</td>
<td>3.7</td>
</tr>
<tr>
<td>Other Motor Vehicle Parts Manufacturing</td>
<td>$3.9</td>
<td>0</td>
<td>-</td>
<td>0.5</td>
</tr>
</tbody>
</table>

*Note: Sorted similarly as the shift-share analysis slide.*

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Top 15 Inputs by Dollars

### Advanced Materials

<table>
<thead>
<tr>
<th>Industries</th>
<th>Estimated Input ($ Millions), 2013</th>
<th>% In-Region</th>
<th>% Out of Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iron and Steel Mills and Ferroalloy Manufacturing</td>
<td>$85.97</td>
<td>0.3%</td>
<td>99.7%</td>
</tr>
<tr>
<td>Corporate, Subsidiary, and Regional Managing Offices</td>
<td>$36.68</td>
<td>1.5%</td>
<td>41.2%</td>
</tr>
<tr>
<td>Printed Circuit Assembly (Electronic Assembly) Manufacturing</td>
<td>$14.99</td>
<td>9.1%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Semiconductor and Related Device Manufacturing**</td>
<td>$14.19</td>
<td>0.0%</td>
<td>16.5%</td>
</tr>
<tr>
<td>Plastics Material and Resin Manufacturing**</td>
<td>$13.22</td>
<td>0.0%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Machine Shops</td>
<td>$11.66</td>
<td>0.6%</td>
<td>13.0%</td>
</tr>
<tr>
<td>Wholesale Trade Agents and Brokers</td>
<td>$10.15</td>
<td>0.6%</td>
<td>11.2%</td>
</tr>
<tr>
<td>Iron and Steel Pipe and Tube Manufacturing from Purchased Steel**</td>
<td>$8.49</td>
<td>0.0%</td>
<td>9.9%</td>
</tr>
<tr>
<td>Rolled Steel Shape Manufacturing</td>
<td>$7.01</td>
<td>4.2%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Rail transportation</td>
<td>$6.87</td>
<td>1.3%</td>
<td>6.7%</td>
</tr>
<tr>
<td>General Freight Trucking, Long-Distance, Truckload</td>
<td>$5.49</td>
<td>1.4%</td>
<td>5.0%</td>
</tr>
<tr>
<td>All Other Basic Organic Chemical Manufacturing**</td>
<td>$5.27</td>
<td>0.0%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Nonferrous Metal (except Aluminum) Smelting and Refining**</td>
<td>$5.14</td>
<td>0.0%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Other Basic Inorganic Chemical Manufacturing**</td>
<td>$5.10</td>
<td>0.0%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Other Electronic Component Manufacturing**</td>
<td>$4.65</td>
<td>0.0%</td>
<td>5.4%</td>
</tr>
</tbody>
</table>

Note: ** industry sector is not present in the region. EMSI shows <10 jobs in iron and steel mills and ferroalloy manufacturing.

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
Top 15 Inputs by Dollars

Advanced Materials

Leakage Analysis, 2013

Iron and Steel Mills and Ferroalloy Manufacturing
Corporate, Subsidiary, and Regional Managing Offices
Printed Circuit Assembly (Electronic Assembly) Manufacturing
Semiconductor and Related Device Manufacturing
Plastics Material and Resin Manufacturing
Machine Shops
Wholesale Trade Agents and Brokers
Iron and Steel Pipe and Tube Manufacturing from Purchased...
Rolled Steel Shape Manufacturing
Rail transportation
General Freight Trucking, Long-Distance, Truckload
All Other Basic Organic Chemical Manufacturing
Nonferrous Metal (except Aluminum) Smelting and Refining
Other Basic Inorganic Chemical Manufacturing
Other Electronic Component Manufacturing

$ Millions

Source: EMSI Class of Worker 2015.4 (QCEW, nonQCEW, self-employed and extended proprietors).
## Top Occupations

### Advanced Materials

<table>
<thead>
<tr>
<th>Occupations</th>
<th>Jobs 2014</th>
<th>% Change, 2009-2014</th>
<th>Median Hourly Earnings</th>
<th>Entry Level Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Assemblers</td>
<td>273</td>
<td>45%</td>
<td>$12.0</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Inspectors, Testers, Sorters, Samplers, and Weighers</td>
<td>155</td>
<td>37%</td>
<td>$16.0</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Electrical and Electronic Equipment Assemblers</td>
<td>154</td>
<td>-19%</td>
<td>$11.1</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>First-Line Supervisors of Production and Operating</td>
<td>133</td>
<td>36%</td>
<td>$23.7</td>
<td>Postsecondary non-degree award</td>
</tr>
<tr>
<td>Workers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Molding, Coremaking, and Casting Machine Setters,</td>
<td>121</td>
<td>33%</td>
<td>$16.8</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Operators, and Tenders, Metal and Plastic</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tire Builders</td>
<td>114</td>
<td>65%</td>
<td>$18.5</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Machinists</td>
<td>114</td>
<td>34%</td>
<td>$17.6</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Industrial Machinery Mechanics</td>
<td>102</td>
<td>52%</td>
<td>$20.6</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Welders, Cutters, Solderers, and Brazers</td>
<td>94</td>
<td>15%</td>
<td>$15.9</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Electrical and Electronics Engineering Technicians</td>
<td>86</td>
<td>-14%</td>
<td>$35.9</td>
<td>Associate's degree</td>
</tr>
<tr>
<td>Cutting, Punching, and Press Machine Setters,</td>
<td>83</td>
<td>24%</td>
<td>$12.8</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Operators, and Tenders, Metal and Plastic</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance and Repair Workers, General</td>
<td>80</td>
<td>40%</td>
<td>$17.5</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Helpers--Production Workers</td>
<td>71</td>
<td>39%</td>
<td>$12.8</td>
<td>Less than high school</td>
</tr>
<tr>
<td>Extruding, Forming, Pressing, and Compacting Machine</td>
<td>71</td>
<td>48%</td>
<td>$20.3</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Setters, Operators, and Tenders</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Computer-Controlled Machine Tool Operators, Metal</td>
<td>67</td>
<td>40%</td>
<td>$14.5</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>and Plastic</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors).
Cluster Comparisons

03

- Forest and Wood Products
- Primary Metal Manufacturing
- Transportation Equipment Manufacturing
- Agribusiness, Food Processing and Technology
- Advanced Materials
- Arts and Recreation
Forest and Wood Product: Contribution by Counties (Jobs 2014)

Source: EMSI 2015.4 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD
Primary Metal Manufacturing: Contribution by Counties (Jobs 2014)

Source: EMSI 2015.4 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD

section 03
Transportation Equipment Manufacturing: Contribution by Counties (Jobs 2014)

Source: EMSI 2015.4 (QCEW Employees, NonQCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD
Advanced Materials: Contribution by Counties (Jobs 2014)
Arts and Recreation: Contribution by Counties (Jobs 2014)

Source: EMSI 2015.4 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD
## Industry Clusters: Components to Assess

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Performance, 2009-2014 (Shift-share analysis)</td>
<td>+436 (positive value)</td>
<td>+199 (positive value)</td>
<td>+152 (positive value)</td>
<td>+256 (positive value)</td>
</tr>
<tr>
<td>Export value, 2013</td>
<td>$1,489,303,758</td>
<td>$440,013,847</td>
<td>$639,432,033</td>
<td>$1,052,242,226</td>
</tr>
<tr>
<td>Leakage, 2013</td>
<td>$680,068,730</td>
<td>$231,485,311</td>
<td>$376,643,365</td>
<td>$630,743,703</td>
</tr>
<tr>
<td>Number of establishments, 2015</td>
<td>136</td>
<td>5</td>
<td>10</td>
<td>121</td>
</tr>
<tr>
<td>Contribution by counties</td>
<td>6</td>
<td>2</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Business input</td>
<td>Seek input from businesses on how they can strengthen their connections to the key clusters, especially providing products and services now being imported from outside the region.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resident’s value</td>
<td>Review Civic Forum Input from Residents</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: EMSI 2015.4 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD
### Industry Clusters: Components to Assess

<table>
<thead>
<tr>
<th></th>
<th>Advanced Materials</th>
<th>Arts and Recreation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Performance, 2009-2014 (Shift-share analysis)</td>
<td>+639 (positive value)</td>
<td>-304 (negative value)</td>
</tr>
<tr>
<td>Export value, 2013</td>
<td>$1,008,852,568</td>
<td>$213,908,269</td>
</tr>
<tr>
<td>Leakage, 2013</td>
<td>$474,642,720</td>
<td>$81,357,073</td>
</tr>
<tr>
<td>Number of establishments, 2015</td>
<td>38</td>
<td>88</td>
</tr>
<tr>
<td>Contribution by counties</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Business input</td>
<td>Seek input from businesses on how they can strengthen their connections to the key clusters, especially providing products and services now being imported from outside the region.</td>
<td></td>
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<td>Resident’s value</td>
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Source: EMSI 2015.4 (QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors); Industry cluster definitions by PCRD