

# A Labor Market Assessment for

## The Fort Campbell Region



Prepared for the:

CLARKSVILLE-MONTGOMERY COUNTY  
ECONOMIC DEVELOPMENT COUNCIL



Prepared by:



May 2007

## ACKNOWLEDGEMENTS

TIP Strategies would like to thank the members of the Clarksville-Montgomery County Economic Development Council, whose time and guidance for this economic development strategic plan were invaluable. We would also like to thank the many business, community, and military leaders, as well as the public, who all greatly contributed to our understanding of the area's workforce, its challenges and opportunities.

Special thanks to Commissioner James Neeley of the Tennessee Department of Labor and Workforce Essentials, Inc. for providing funding for the project.

### **TIP Strategies – Project Team**

Tom Stellman, President and CEO

Alex Cooke, Project Director



# TABLE OF CONTENTS

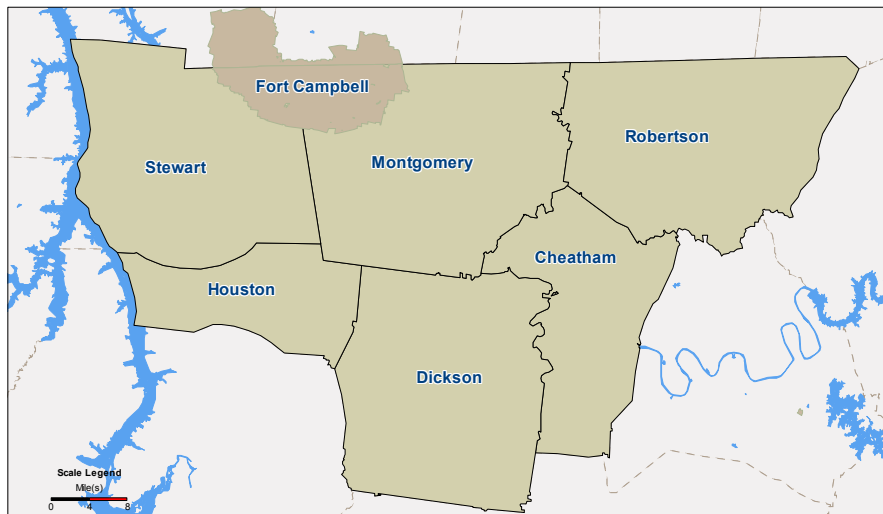
EXECUTIVE SUMMARY .....	3
INTRODUCTION.....	3
KEY FINDINGS.....	4
REGIONAL LABOR SHED .....	12
FORT CAMPBELL INVENTORY .....	14
VETERANS SURVEY .....	14
SPOUSES SURVEY .....	23
BEST PRACTICES .....	33
KEY FINDINGS.....	34
COMMUNITY AUDIT .....	41
WHAT ARE THE AREA'S DEMOGRAPHIC CHARACTERISTICS? .....	42
WHAT ARE THE REGION'S MAJOR INDUSTRIES?.....	44
WHO ARE THE MAJOR EMPLOYERS? .....	45
WHAT ARE THE WAGE PATTERNS LIKE? .....	46
WHAT ARE THE MAJOR OCCUPATIONAL PATTERNS? .....	47
HOW ARE COMMUTING AND MIGRATION PATTERNS AFFECTING THE LABOR POOL? .....	50
WHAT ARE THE MAJOR ECONOMIC & DEMOGRAPHIC CHARACTERISTICS OF THE LABOR FORCE? .....	56
WHAT ARE THE SCENARIOS FOR FUTURE EMPLOYMENT IN THE REGION? .....	59
WHAT ISSUES DID THE FIELD INTERVIEWS REVEAL?.....	61
RECOMMENDATIONS.....	63
APPENDIX 1: MOS-SOC CROSSWALK .....	68

# EXECUTIVE SUMMARY

## INTRODUCTION

The Clarksville-Montgomery County Economic Development Council (CMCEDC) engaged TIP Strategies to conduct a workforce assessment and community audit for the region surrounding Fort Campbell. The purpose of the study is threefold: (1) to investigate and document the demographics of the regional labor force; (2) to determine the availability of a quality workforce to support the hiring needs of both existing and prospective employers; and (3) to understand the influence of Fort Campbell.

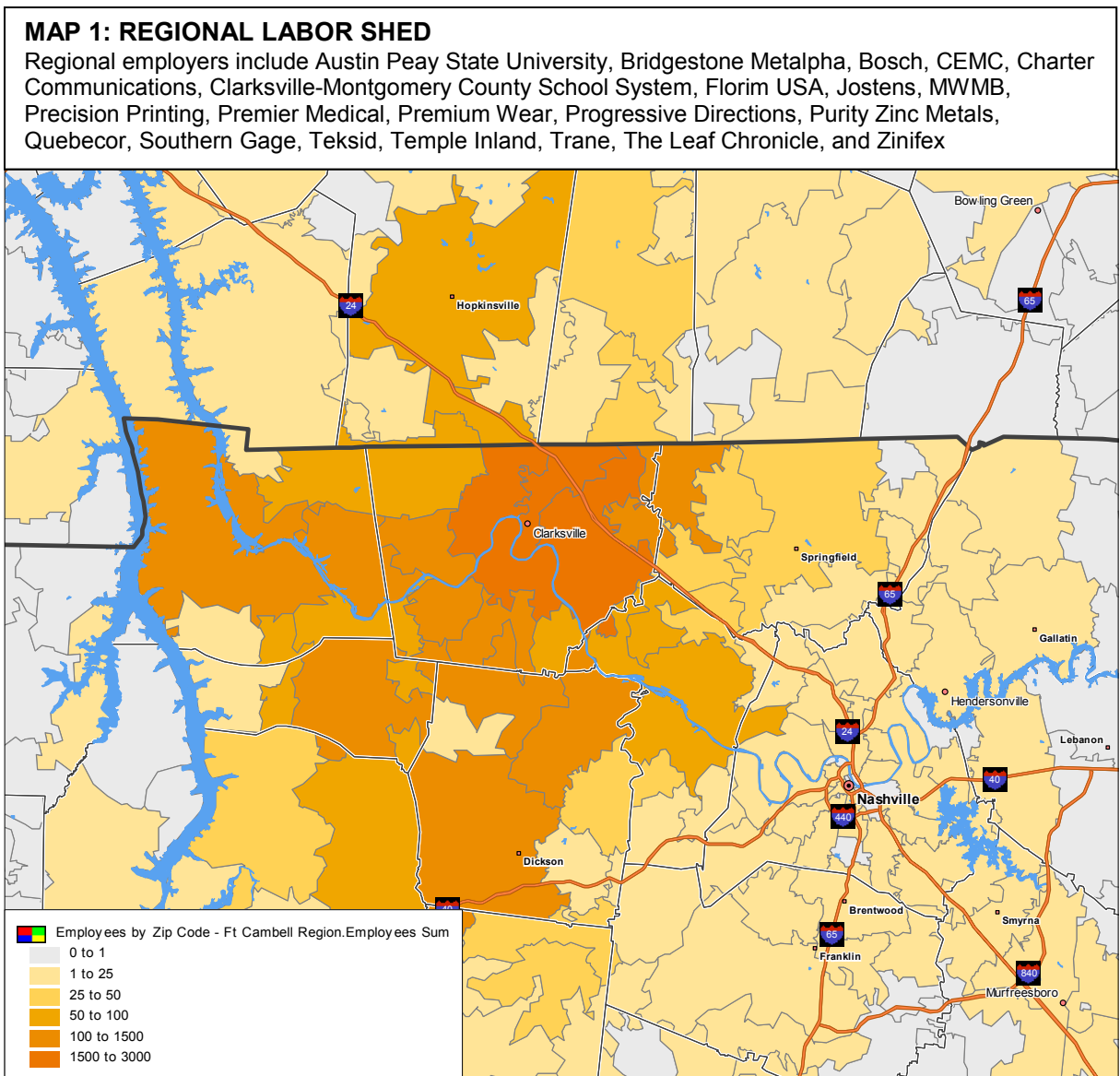
We approached the task of profiling the regional workforce using both qualitative and quantitative methods. We began by defining the regional labor shed based on commuting patterns and data compiled from major employers in the region. The results of this work are presented in a series of maps. We then analyzed the area's demographics from the perspective of current and future employers. The data analysis was supplemented by interviews with major employers, higher education representatives, and community leaders. The results of this work are included as part of the community audit section.



Particular emphasis of the study was placed on understanding the resource represented by Fort Campbell. Towards that end, we met with military officials, as well as active duty soldiers and their spouses to gain an understanding of how the region was viewed in terms of the economic opportunity afforded to spouses or to soldiers upon separation from service. In addition, we benchmarked similarly situated communities to gather information on best practices which might inform recommendations for the region.

## KEY FINDINGS

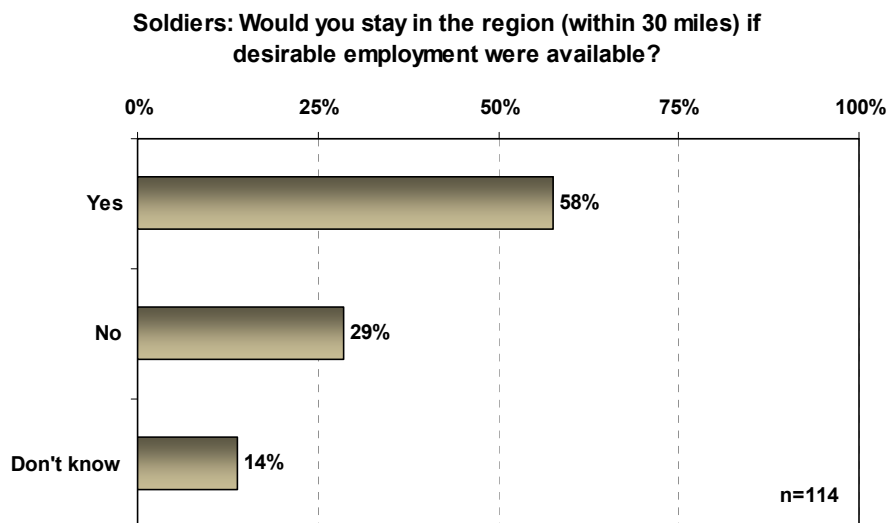
- The Fort Campbell regional labor shed is extensive. TIP mapped employee residential zip code data from key employers in the area to visually illustrate where particular workforces reside. From the resulting maps, it is clear that employers in the region source their workers from a wide section of both Tennessee and Kentucky. Large and medium-sized employers in such industry sectors as manufacturing, healthcare, services, and public administration appear able to attract workers from diverse rural and urban areas.
- Within the six-county study area, residential zip code data on 11,606 employees from 21 area employers shows people commuting to work from as far away as Murfreesboro, TN and Bowling Green, KY. **These findings suggest that a low unemployment rate in the region does not necessarily translate into low workforce availability.**



In order to better understand and document the unique characteristics of the region's military related workforce, TIP surveyed the post-military intentions, educational levels, skills, and desired employment of soldiers separating from the military at Fort Campbell, as well as the spouses of soldiers stationed at Fort Campbell. These surveys are the first "snapshot" of an ongoing Fort Campbell veterans and spouses inventory system that will be routinely updated and published. The initial inventory consisted of 190 soldiers and 97 spouses surveyed over a two-month period.

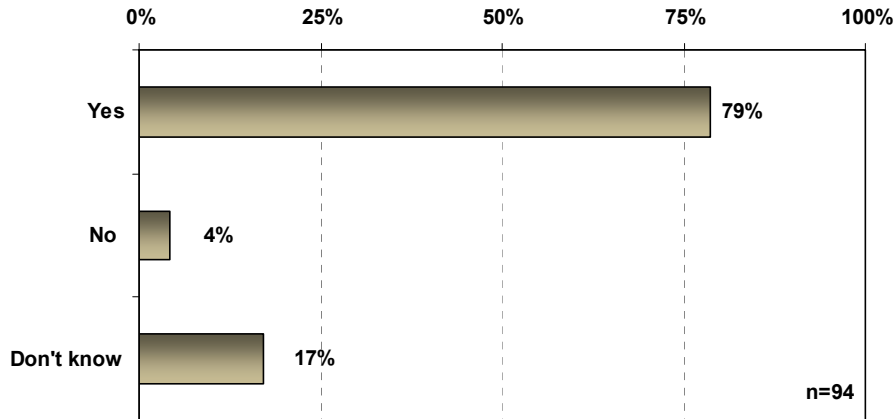
<b>Fort Campbell FY06 Statistics</b>	
Headquarters, 101st Airborne Division	
Total Military Population	30,334
Officers	2,603
Warrant Officers	1,049
Enlisted	26,682
Total Civilians	4,388
Family Members	56,537
Supported Retirees	56,638
Size of Post	105,568 acres

- One of the region's greatest economic assets is the skilled, disciplined, and motivated talent base associated with Fort Campbell. This potential workforce consists of Army retirees living in the region, as well as current soldiers separating from service through Fort Campbell.
- This pool of existing and potential labor is further enhanced by the spouses of Fort Campbell personnel, who themselves are often highly skilled, educated, and underutilized.
- When asked if they would stay if desirable employment were available in the region, 58 percent of soldiers say they would remain. Among retirement eligible soldiers, 80 percent indicate they would stay for a good job.



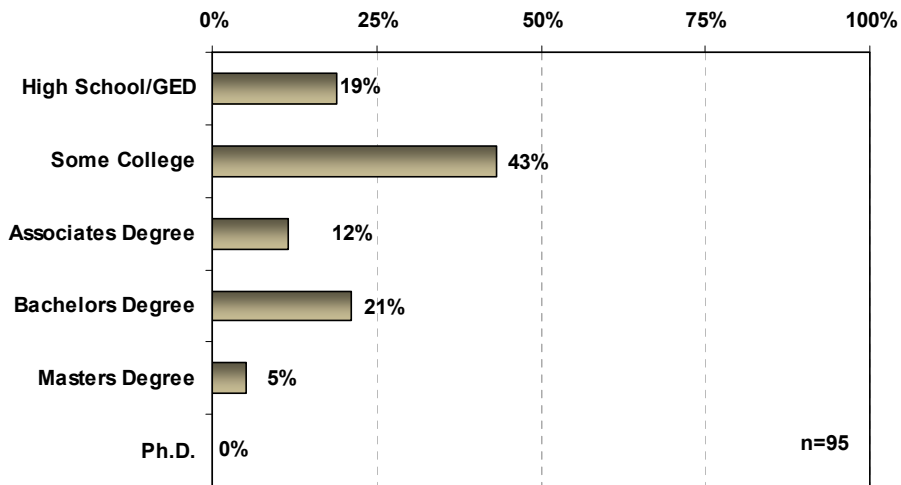
- Of the military spouses surveyed, an impressive 79 percent said they would stay in the region if desirable employment were available for their family. Regardless of employment options, 58 percent indicated they intend to remain in the region after their spouses' service ends.

**Spouses: Would you stay in the region (within 30 miles) if desirable employment were available for you and your spouse?**

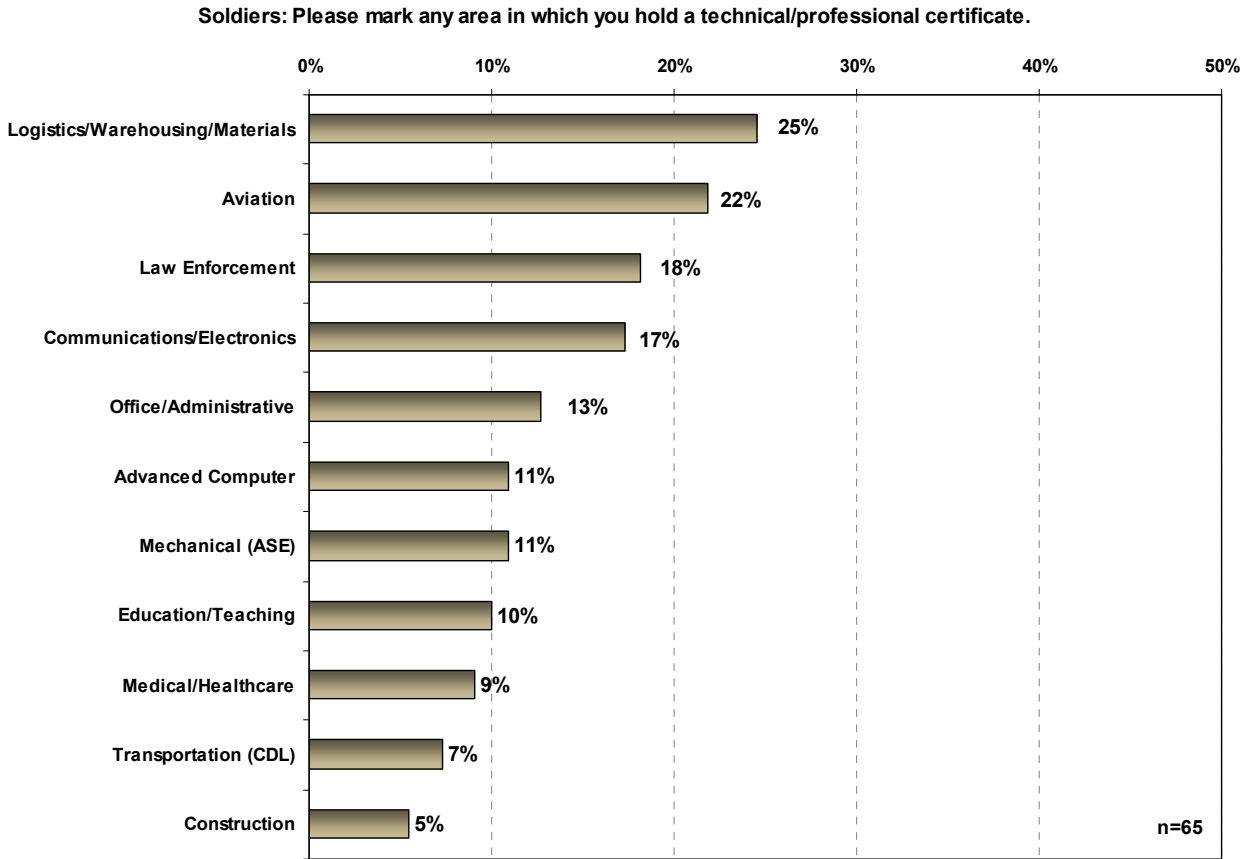


- The soldiers and spouses surveyed are well educated. Forty-three percent of the soldiers report some college experience. Almost 30 percent of the soldiers surveyed have earned a post-secondary degree.
- Forty-three percent of the military spouses also reported having some college experience; another 38 percent have earned a post-secondary degree. In comparison, 26 percent of the population in Montgomery County age 25 or older in the 2000 Census reported earning a post-secondary degree.

**Spouses: What is your highest level of education completed?**

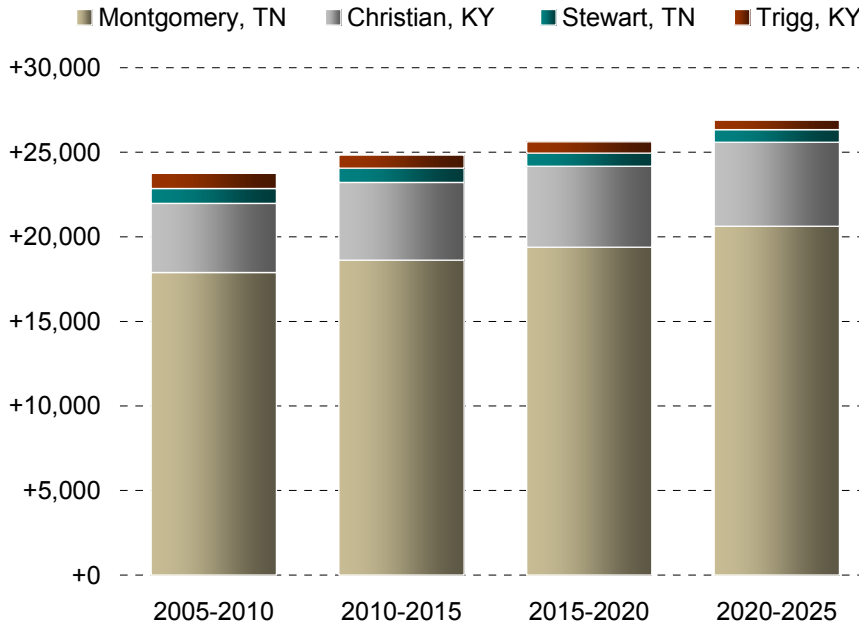


- Of those soldiers possessing a technical or professional certification, the most frequently reported specializations were logistics & warehousing & materials, aviation, law enforcement, communications & electronics, and office & administrative. Among retirees, aviation was the most reported certification; non-retirees cited logistics/warehousing and law enforcement most frequently.

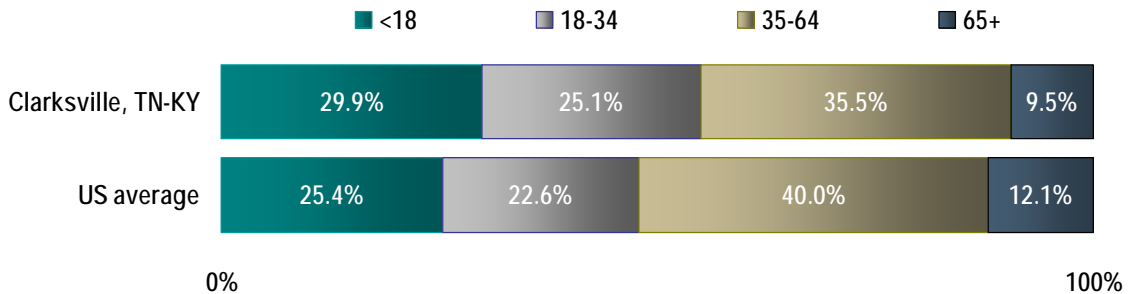


- Almost half of the spouses reported some sales & service & retail skills or certifications. Other frequently reported categories include medical & healthcare, finance & accounting, communications & electronics, advanced computer & software, education/teaching, and social work/human services & public management. Skills reported under “other” include logistics, human resources, administrative, and law enforcement.

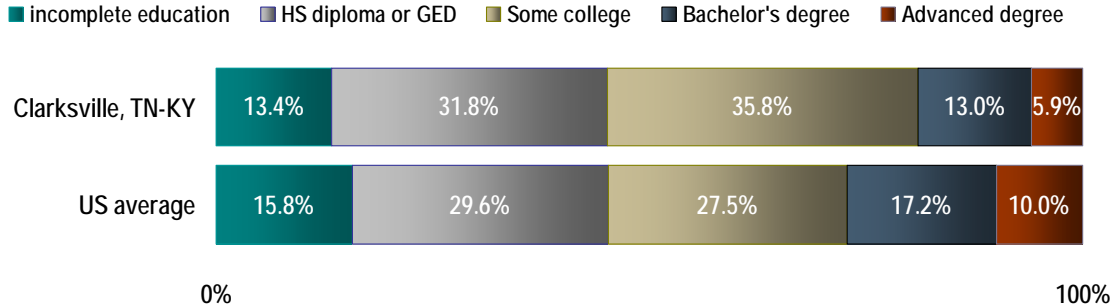
- According to the TN and KY state data centers, **the Clarksville MSA is projected to gain over 100,000 net new residents by 2025 – or 5,000 new residents annually for the next 20 years.** Moreover, the gains are projected to grow larger for each consecutive five-year period, culminating with a net increase of 27,000 residents between 2020 and 2025.
- Future population growth in the Clarksville MSA will be fueled primarily by growth in Montgomery County. The Tennessee State Data Center projects Montgomery County alone will grow by over 20,000 new residents between 2020 and 2025.



- The Clarksville metro area’s population is more youthful than the U.S. as a whole. In fact, 55 percent of the Clarksville MSA’s population is under the age of 35, compared to 52 percent for the U.S.



- Educational distribution data for the Clarksville MSA suggest a broad middle class that can support an array of skilled manufacturing occupations, such as machinists, metal fabricators, machine setters, electronic equipment technicians, and plastics workers.



- The Clarksville MSA has a very high location quotient (LQ) for production occupations as well as installation, maintenance, and repair occupations.<sup>1</sup> Occupations in both of these groups typically pay reasonably well and require modest educational levels and solid experience. Occupations in education and training also score an above-average LQ.

OCCUPATIONAL EMPLOYMENT IN THE CLARKSVILLE MSA

Occupational Group	Employment	Location Quotient
Production	12,350	2.01
Office & administrative support	12,290	0.90
Sales	7,590	0.91
Food preparation & serving	7,340	1.14
Education, training, & library	5,860	1.21
Transportation & material moving	5,490	0.96
Healthcare (technical)	4,430	1.13
Installation, maintenance, & repair	4,270	1.35
Management	3,310	0.93
Construction & extraction	2,480	0.65
Protective service	2,120	1.16
Property maintenance	2,100	0.81
Healthcare (support)	2,090	1.04
Business & finance	1,800	0.56
Personal care & service	1,340	0.70
Architecture & engineering	850	0.60
Computer & mathematical	420	0.24
Arts, design, & media	410	0.41
Life, physical, & social science	260	0.37
Farming, fishing, & forestry	100	0.38
Community & social services	na	na
Legal	na	na

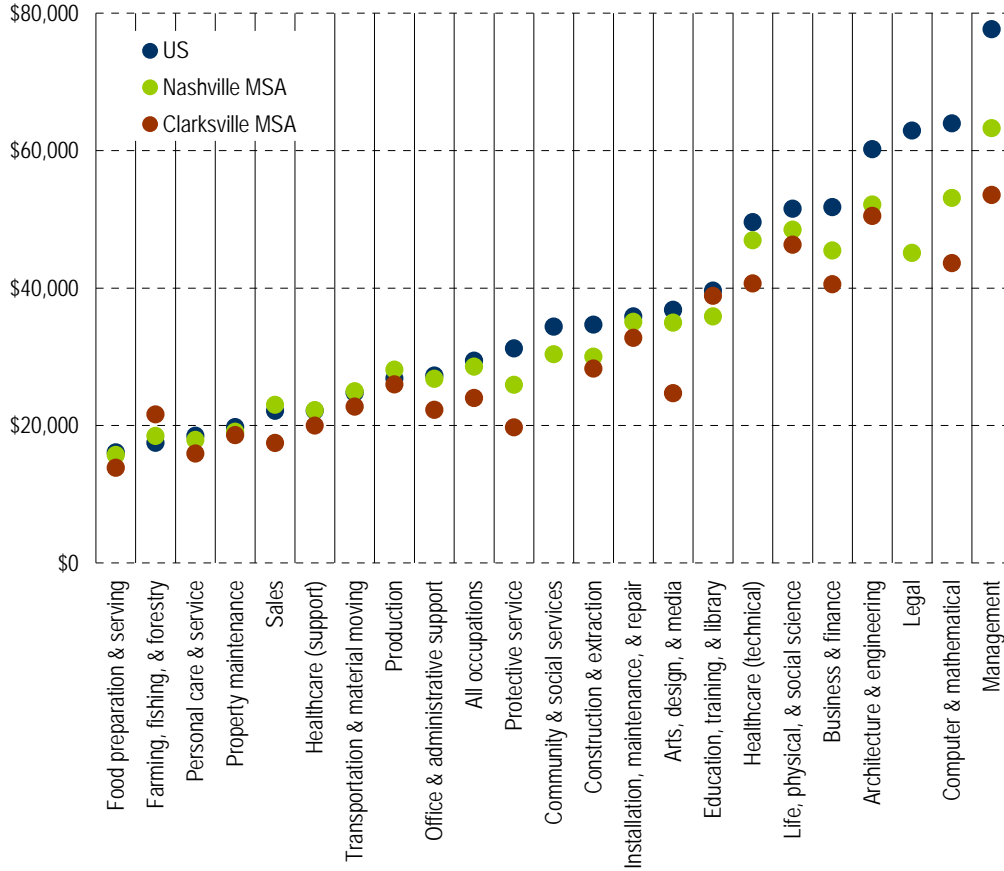
1.00 = U.S. avg.

SOURCE: U.S. Bureau of Labor Statistics; TIP Strategies calculations

<sup>1</sup> A location quotient is calculated as a local industry's share of total local employment divided by the same industry's share of employment at the national level. If the local industry and national industry are perfectly proportional, the location quotient will be 1.0. If an industry is heavily concentrated at the local level, then the location quotient will be higher than 1.0. Conversely, if the industry is sparsely concentrated at the local level, the location quotient will be lower than 1.0.

- In the lower-paid and lower-skilled occupational groups, the median salary in the Clarksville MSA is very similar to both the U.S. and the Nashville averages. But as the pay and skill level of each occupational group increases, the salary gap for Clarksville's workers begins to widen. The gap is particularly wide for managers and computer specialists. Occupational groups where Clarksville's workers earn very close to the national average include sales, production, and education.

### MEDIAN SALARY BY OCCUPATIONAL GROUP

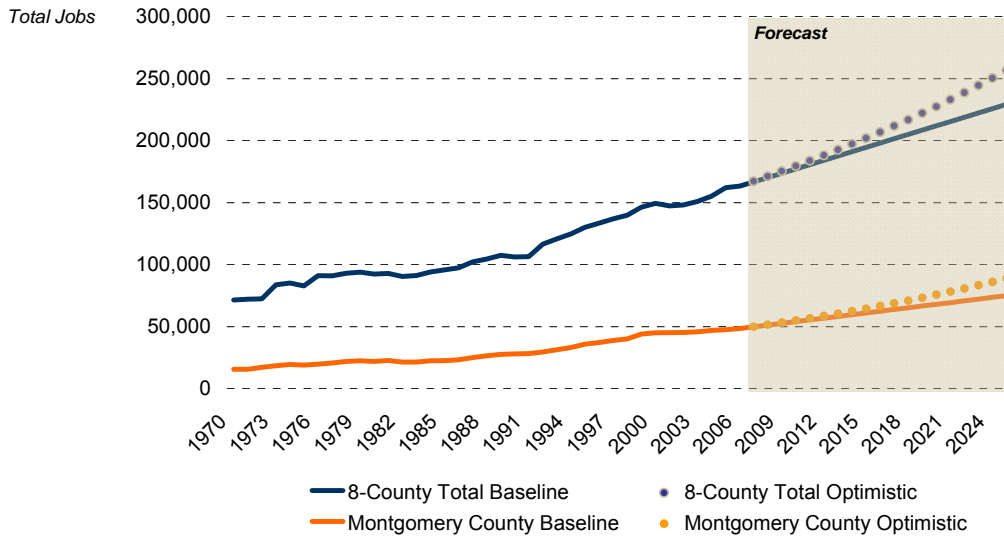


Source: U.S. Bureau of Labor Statistics

TIP completed two forecast scenarios for overall job growth in the 8-county Fort Campbell region<sup>2</sup>. The first “baseline” scenario assumes that the average net number of jobs added annually in each county since 1990 will be projected forward into the future. The second scenario assumes that the six Tennessee counties will grow at a slightly faster pace than in the baseline. We averaged the annual recent growth rates for these counties and projected them forward.

- In the baseline forecast, Montgomery County's annual job growth would range from 1.9 percent to 2.8 percent, but in the more optimistic scenario, job growth for the county would average about 3.3 percent annually through 2025. If this rate were sustained, it would boost total jobs in Montgomery County above Christian County before 2020. This is significant since most of Fort Campbell's base employment is counted in Christian County.

### JOB FORECAST SCENARIOS FOR THE 8-COUNTY REGION



SOURCE: U.S. Bureau of Economic Analysis; U.S. Census Bureau (QCEW); TIP Strategies

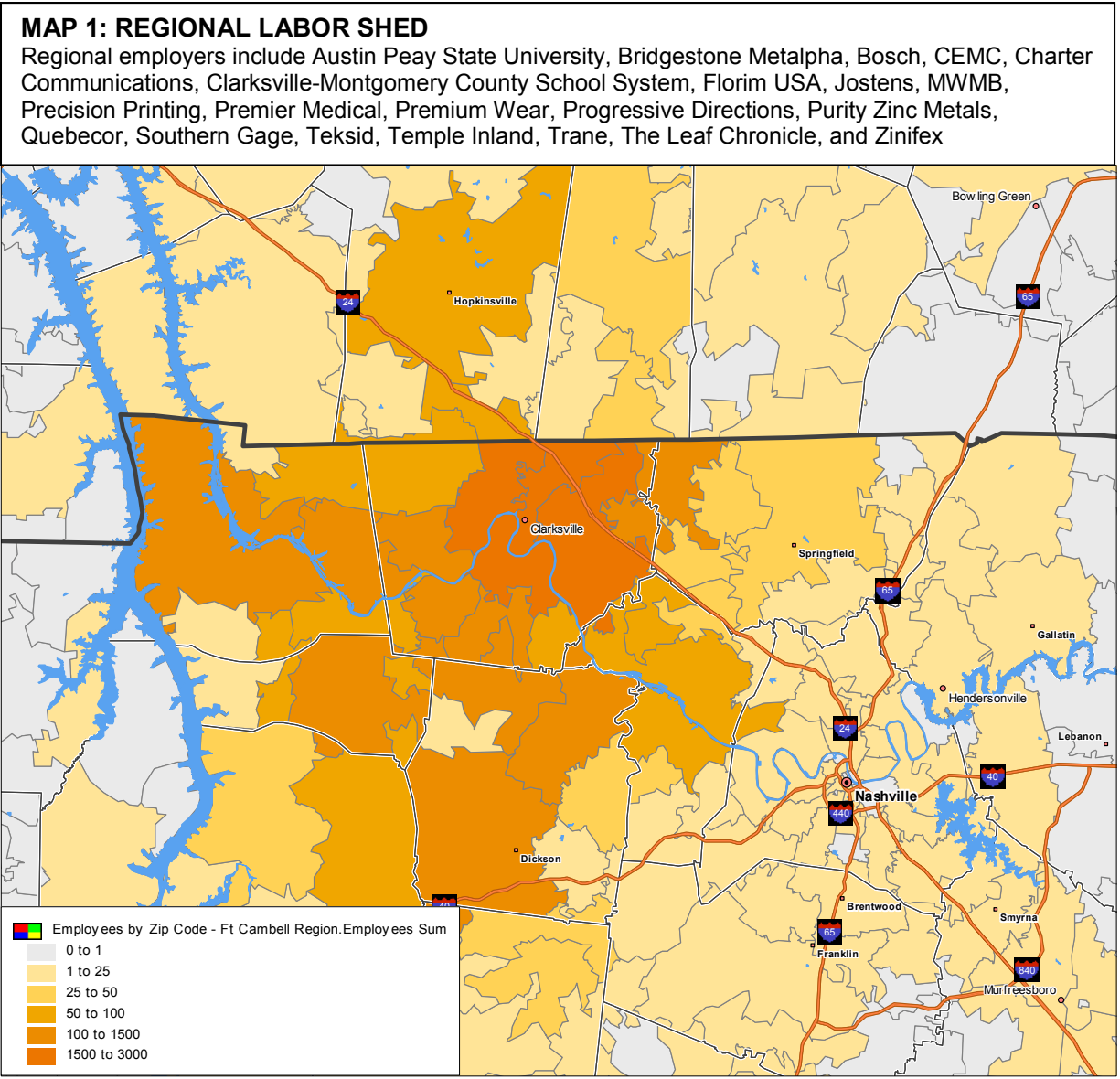
- Finally, through individual focus groups and interviews, most Fort Campbell area employers report general satisfaction with both the quality and quantity of region’s labor force.
- The regional workforce and employers are well served by workforce training and support service organizations, including Workforce Essentials, Inc. and the Tennessee Technology Center.

<sup>2</sup> Region includes Montgomery, Stewart, Robertson, Dickson, Cheatham, Houston, Christian (KY), and Trigg (KY).

# REGIONAL LABOR SHED

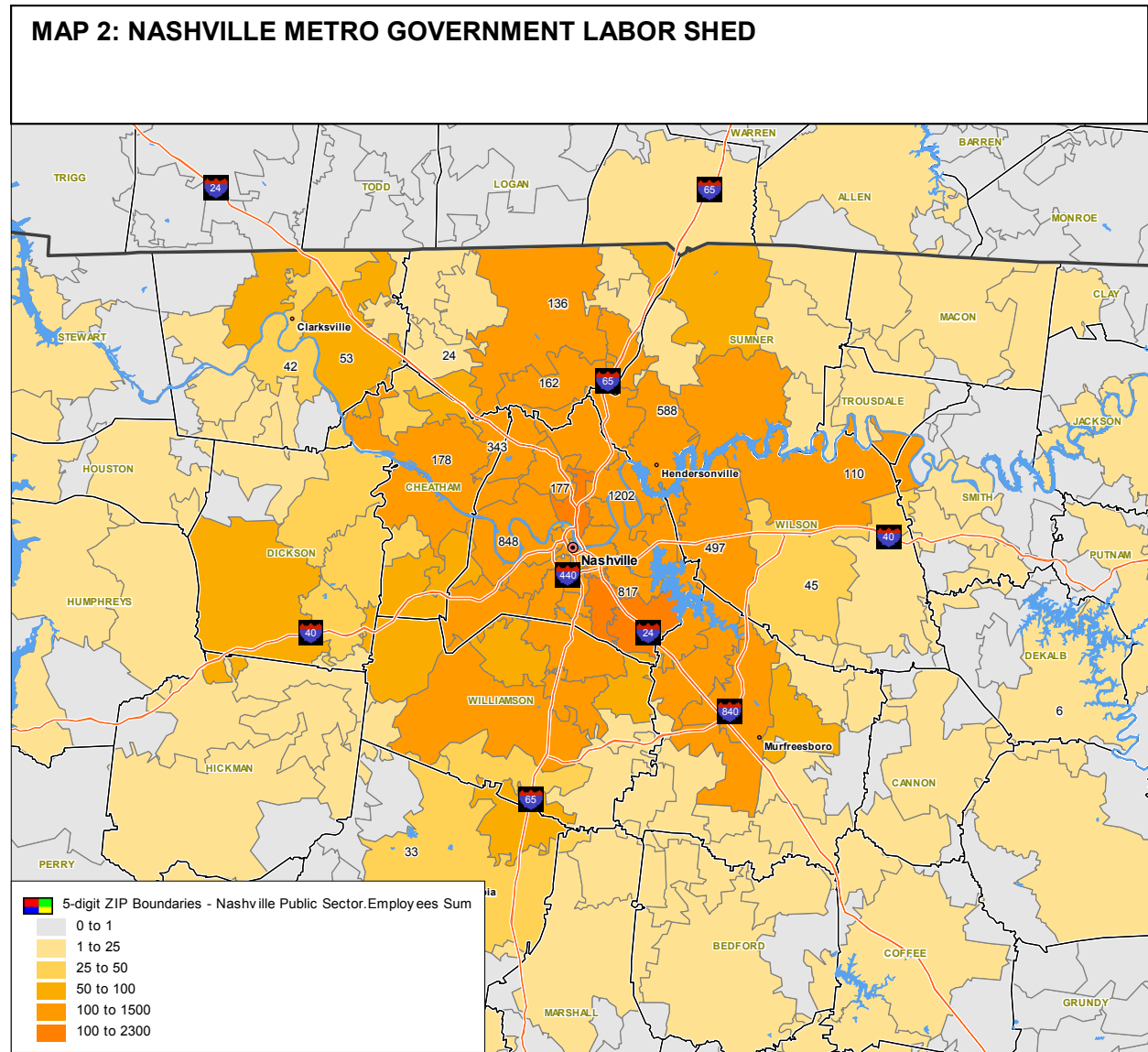
As part of the community audit, we analyzed published data on commuting patterns for the Clarksville and Nashville metropolitan areas. We supplemented this data by mapping employee zip code data provided by several Clarksville and Nashville area employers in order to illustrate where a particular workforce resides. The resulting maps show the aggregate numbers of over 35,000 employees residing in each zip code in the two-state region.

Map 1 shows employee zip codes for 21 employers in the six-county study area. It reveals just how considerable the labor draw area is for these companies, with employees commuting to work from as far away as Murfreesboro, TN and Bowling Green, KY.



Map 2 below shows the labor shed for the Metropolitan Government of Nashville and Davidson County, Tennessee. Employing over 25,000 people who reside in over 250 different zip codes, the Nashville Metro Government draws its employees from a wide swath of Tennessee, including about 150 workers from the Clarksville area.

Together, these two maps depict just how vast the regional labor shed is in the region. Large and medium-sized employers, including manufacturers, health care providers, service firms, and public agencies, appear able to attract workers from diverse rural and urban areas in two states.



# FORT CAMPBELL INVENTORY

## VETERANS SURVEY

As part of this study, TIP was asked to conduct an initial inventory of region's active duty military personnel separating from service through Fort Campbell. The purpose of the inventory is to document the unique characteristics of this workforce and their potential impact on the regional civilian labor pool. To accomplish this task, we developed a one-page questionnaire that was provided to Fort Campbell soldiers attending Transition Assistance Program (TAP) workshops in March, April, and May 2007. The TAP workshops are designed to assist military personnel in transitioning to civilian careers.

Over the course of these two months, the survey was administered to two separate workshops, with one of the classes consisting primarily of junior enlisted service members and one consisting of more senior personnel approaching retirement. All service members attending TAP workshops are scheduled to leave the active duty service within six months. In total, 190 soldiers completed at least portions of the questionnaires.

The objective of the survey was to obtain basic information on length of service, educational attainment, intent to remain in the region permanently, professional and technical skills, desired career fields for the service member and spouse, and views on other quality of place issues that would affect their decision to remain in the region. Suggestions regarding the future administration, tabulation, and utilization of the Clarksville-area military veterans inventory are contained in the recommendations section of the report.

The survey questionnaire and the results of the completed surveys are included on the following pages.

SURVEY OF POST-MILITARY SERVICE INTENT

This brief survey is designed to assist economic development and workforce officials in the Clarksville-Montgomery County region in creating expanded employment opportunities for military personnel departing from Fort Campbell and their spouses. Your voluntary assistance in answering the questions below is greatly appreciated.

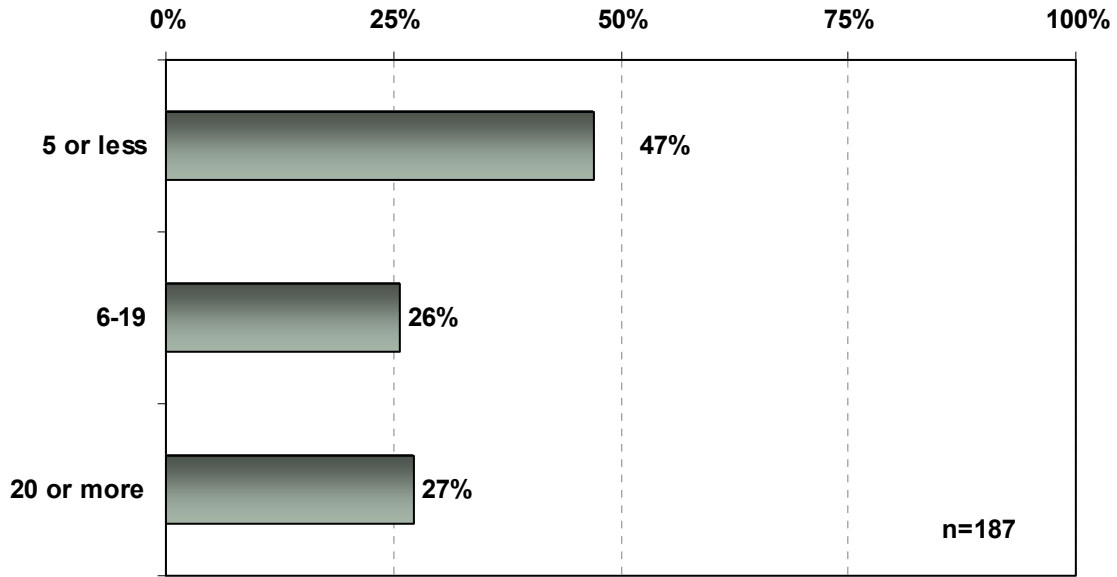
1. How many years of service do you possess?  
 5 or less           6 to 19           20 or more
  
2. What is your reason for leaving the military?  
 Retirement           ETS/Chapter           Medical
  
3. Are you planning to stay in the region (within 30 miles of Fort Campbell) after your service ends?  
 Yes           No           Don't know
  
4. Would you stay in the region (within 30 miles) if desirable employment were available?  
 Yes           No           Don't know
  
5. What is your highest level of education completed?  
 High School/GED           Associates Degree           Masters Degree   
 Some College           Bachelors Degree           Ph.D.
  

6. Please mark any area in which you hold a technical/professional certificate.  Advanced Computer <input type="checkbox"/> Aviation <input type="checkbox"/> Communications/Electronics <input type="checkbox"/> Construction <input type="checkbox"/> Education/Teaching <input type="checkbox"/> Law Enforcement <input type="checkbox"/> Logistics/Warehousing/Materials <input type="checkbox"/> Mechanical (ASE) <input type="checkbox"/> Medical/Healthcare <input type="checkbox"/> Transportation (CDL) <input type="checkbox"/> Office/Administrative <input type="checkbox"/> Other _____ <input type="checkbox"/>	7. What type of post-military employment do <u>YOU</u> desire?  Administrative/Office <input type="checkbox"/> Aviation <input type="checkbox"/> Communications/Electronics <input type="checkbox"/> Computers/Software <input type="checkbox"/> Construction <input type="checkbox"/> Education/Teaching <input type="checkbox"/> Equipment Maintenance/Repair <input type="checkbox"/> Law Enforcement/Security <input type="checkbox"/> Management/Business <input type="checkbox"/> Manufacturing <input type="checkbox"/> Medical/Healthcare <input type="checkbox"/> Transportation/Warehousing <input type="checkbox"/>	8. What type of employment does your <u>SPOUSE</u> desire?  Administrative/Office <input type="checkbox"/> Aviation <input type="checkbox"/> Communications/Electronics <input type="checkbox"/> Computers/Software <input type="checkbox"/> Construction <input type="checkbox"/> Education/Teaching <input type="checkbox"/> Equipment Maintenance/Repair <input type="checkbox"/> Law Enforcement/Security <input type="checkbox"/> Management/Business <input type="checkbox"/> Manufacturing <input type="checkbox"/> Medical/Healthcare <input type="checkbox"/> Transportation/Warehousing <input type="checkbox"/>
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9. Improvements in which other area would most positively affect your decision to remain in the region?  
 Higher Education Offerings           Housing   
    Child Care           Healthcare   
    Retail/Shopping           Entertainment/Recreation   
    Other  \_\_\_\_\_

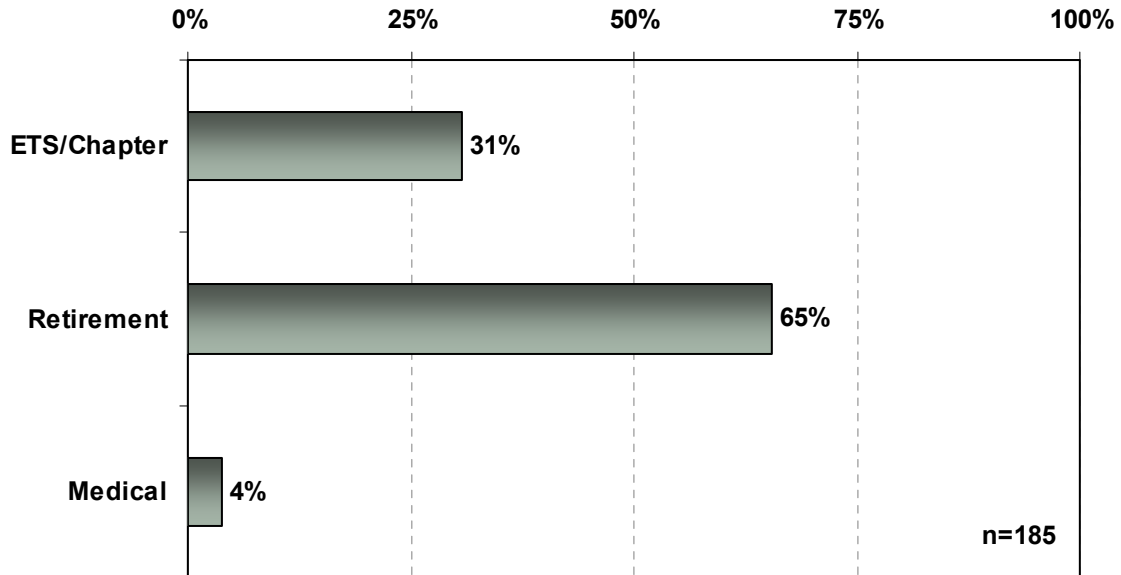
Of the 114 soldiers responding to the question regarding current years of service, almost half had served five years or less. Roughly equal numbers of soldiers taking the survey had served 6 to 19 years and 20-plus years.

**Q1: How many years of service do you possess?**



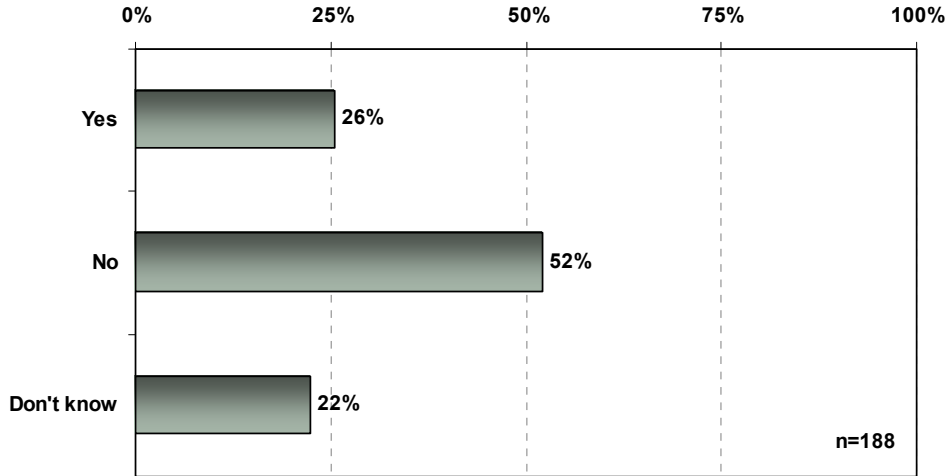
Almost two-thirds of respondents cited retirement as their reason for leaving the military, while about one-third were leaving due to Expiration of Term of Service (ETS).

**Q2: What is your reason for leaving the military?**



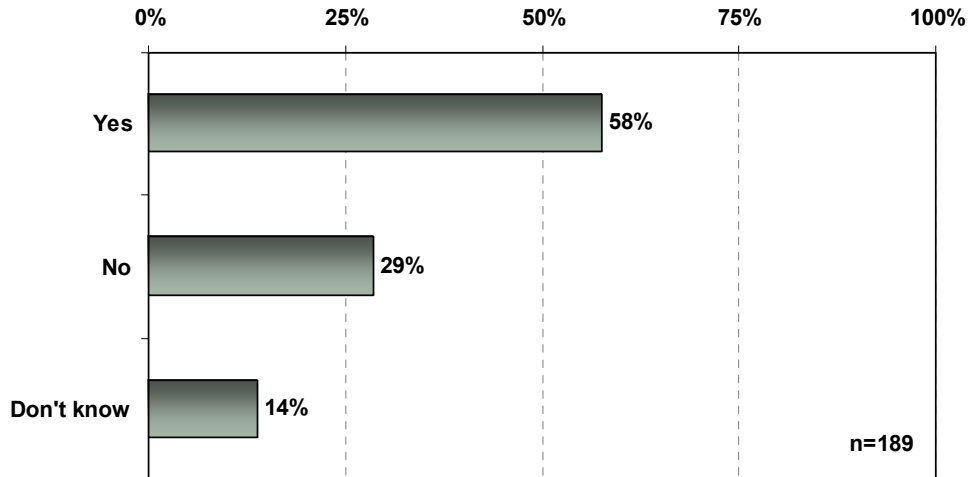
Under current circumstances, about half of the soldiers surveyed planned to leave the region at the conclusion of their military service. Another one-quarter were planning to stay, while the remaining one-quarter were unsure. Among retirees, who are older and likely to have lived in the region for longer, 52 percent indicated that they plan to remain and 27 intend to leave. One-fifth of non-retirees did not know.

**Q3: Are you planning to stay in the region (within 30 miles of Fort Campbell) after your service ends?**



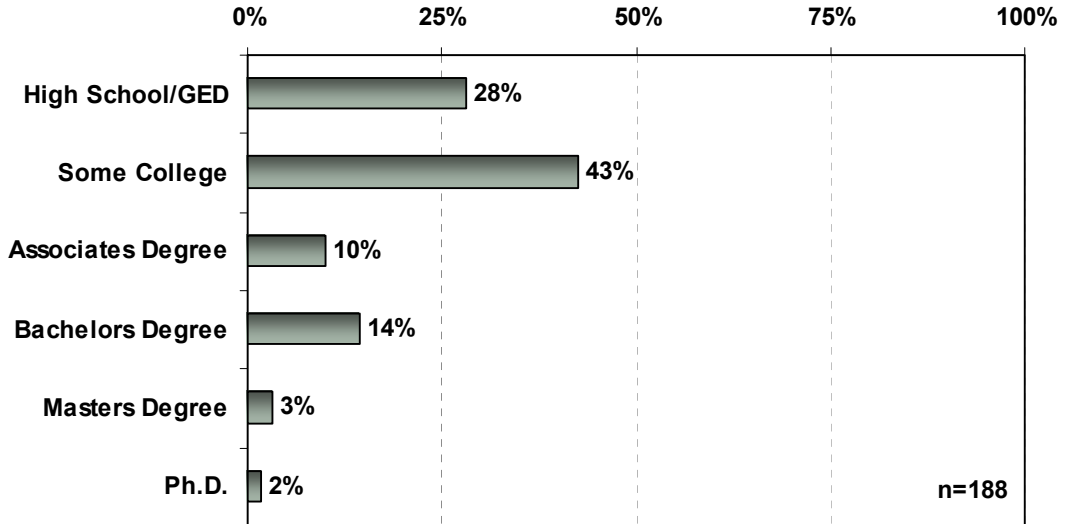
However, when asked if they would stay if desirable employment were available, the percentage of total respondents answering “yes” jumped to 58 percent. Most of the change of heart came from soldiers who previously answered “no” to Q3. Among the retirement-eligible soldiers, 81 percent indicated they would stay for a good job. Just under 50 percent of non-retirees responded in the affirmative.

**Q4: Would you stay in the region (within 30 miles) if desirable employment were available?**

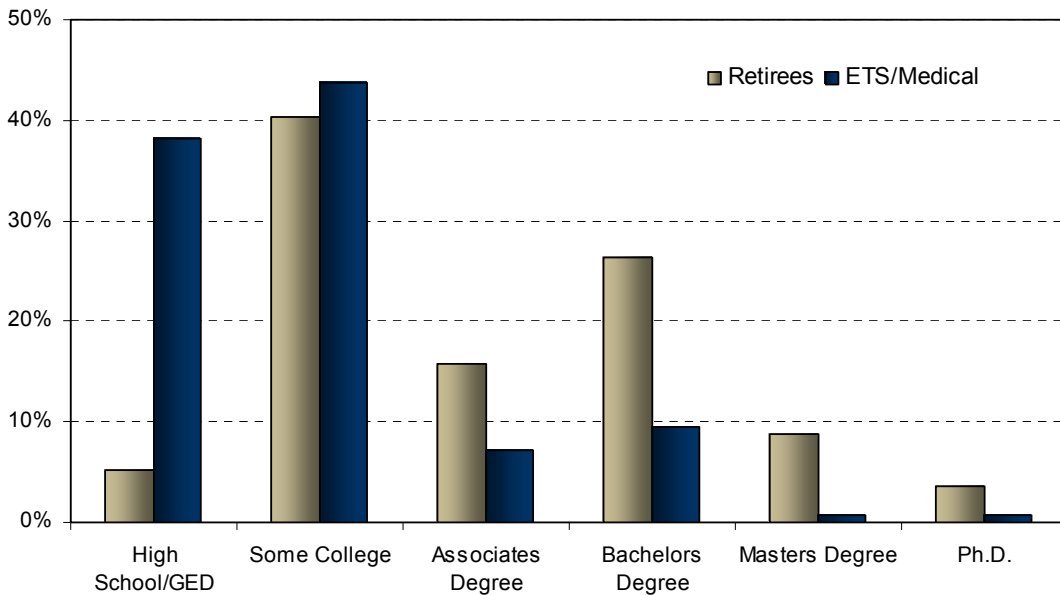


The soldiers participating in the survey possess a high level of educational attainment. One-fifth of the respondents have earned a post-secondary degree; an additional 43 percent reported some college experience.

**Q5: What is your highest level of education completed?**

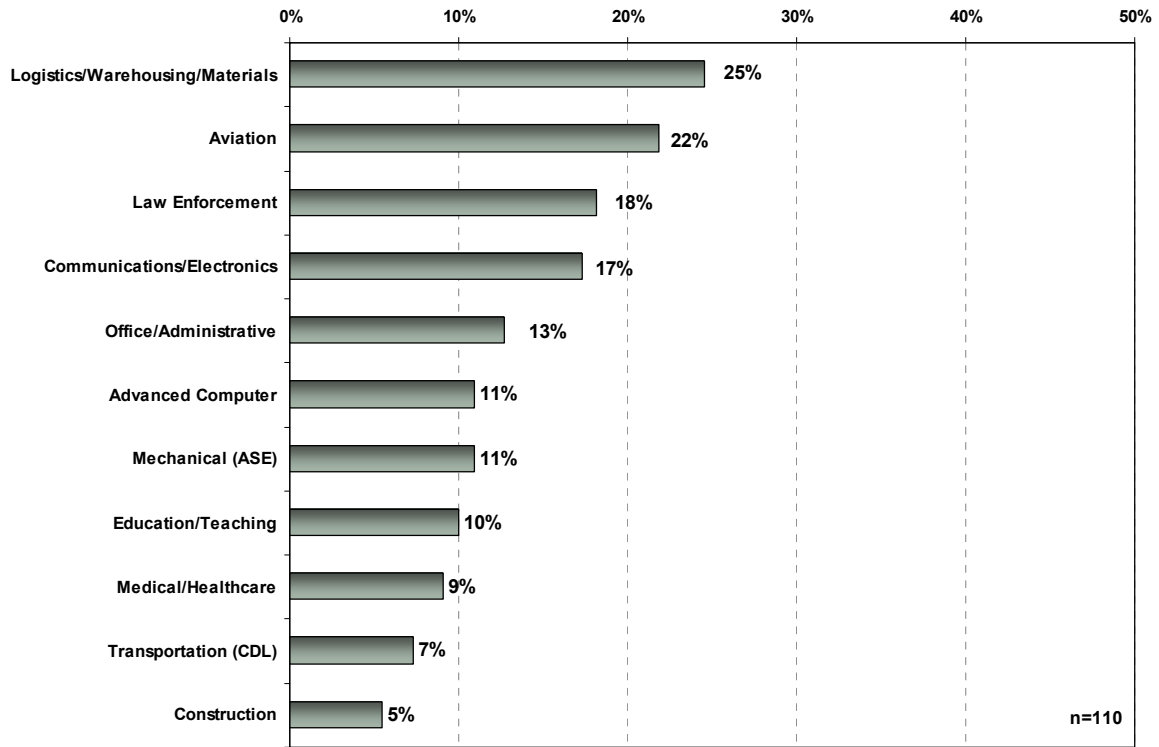


The majority of the respondents that had completed some college were from the non-retiree ranks, which suggests many in this group will prefer locating in communities where they can continue their higher education studies. Over 50 percent of retirement eligible respondents have earned a postsecondary degree, including 26 percent earning a bachelor’s degree.



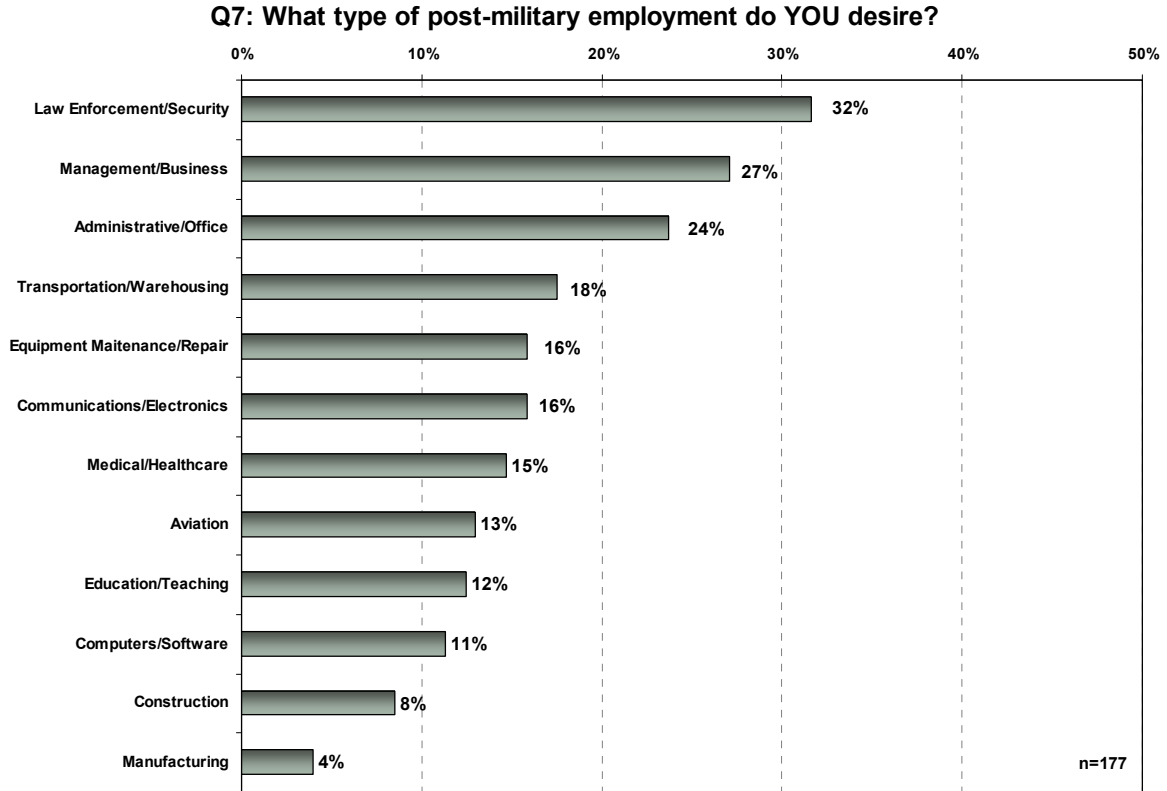
Of those soldiers possessing a technical or professional certification, the most frequently reported specializations were logistics/warehousing/materials, aviation, law enforcement, communications/electronics, and office/administrative. Among retirees, aviation was the most reported certification; non-retirees cited logistics/warehousing and law enforcement most frequently.

Q6: Please mark any area in which you hold a technical/professional certificate.

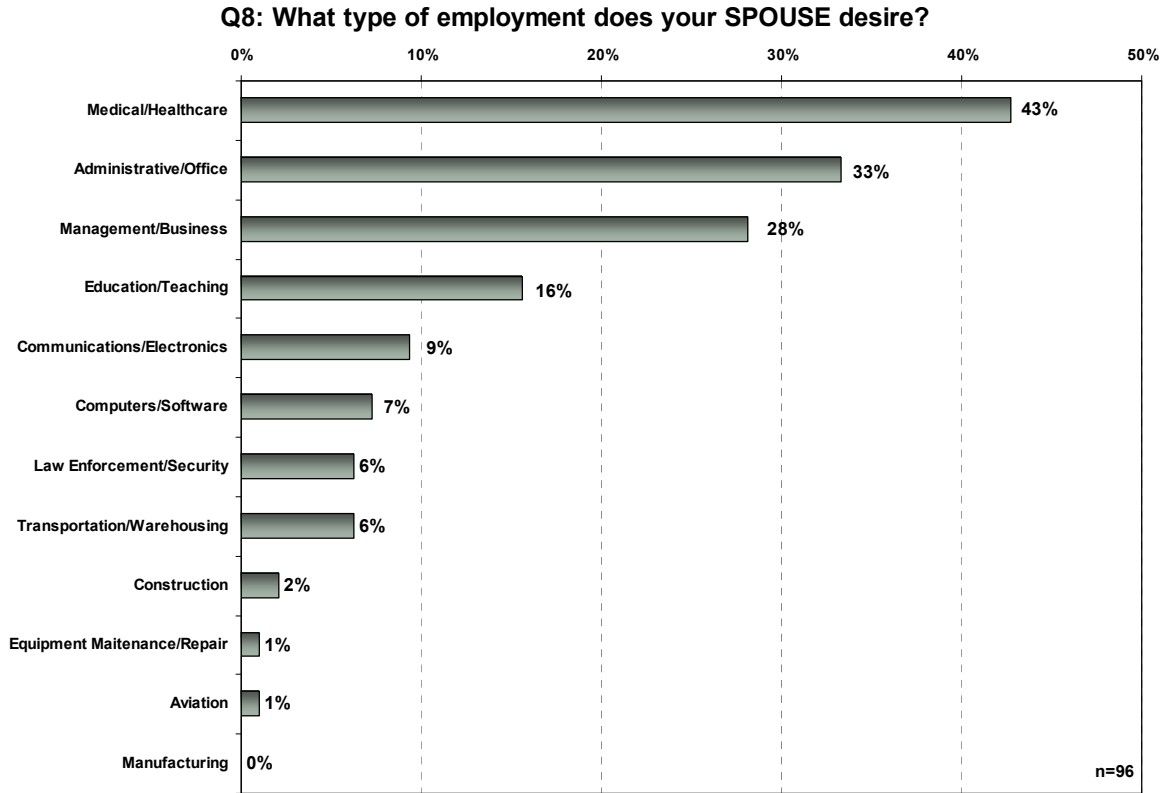


The law enforcement/security profession was the most favored career among those who indicated a preference, followed by management/business and administrative/office. Of note, the equipment maintenance and repair profession, which some of area’s local manufacturers reported to the consulting team as a pressing hiring need, received a relatively high 16 percent response rate.

Non-retirees reported law enforcement as their most desired profession (42 percent), while retirees chose management/business most often (33 percent).

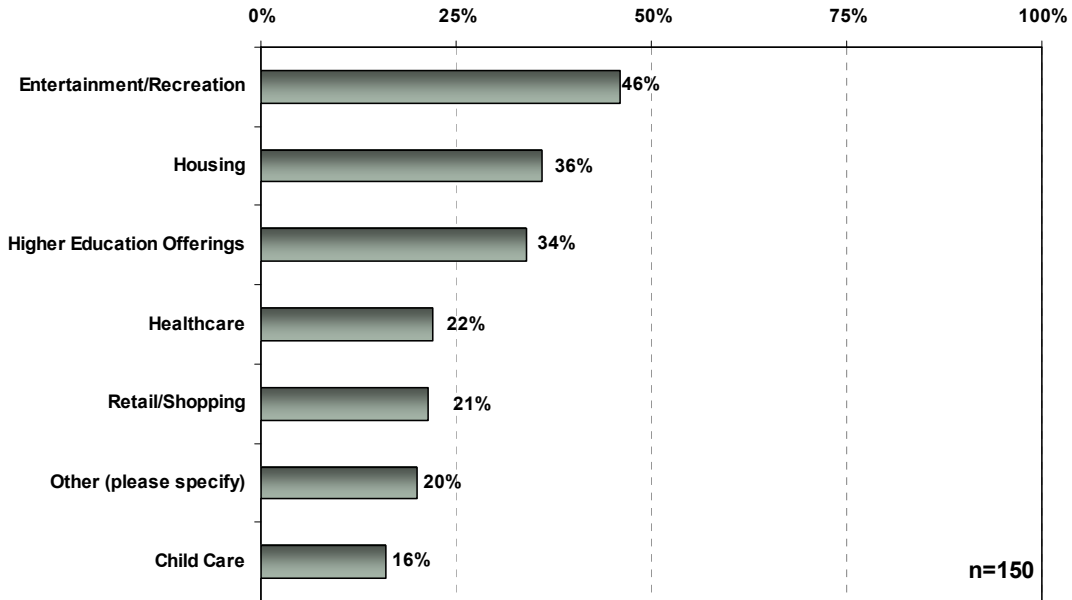


When asked about their spouses' employment desires, the soldiers most often cited medical/healthcare, administrative/office, and management/business. These results are similar to those from the Fort Campbell spouses survey, which are reported in the following section.

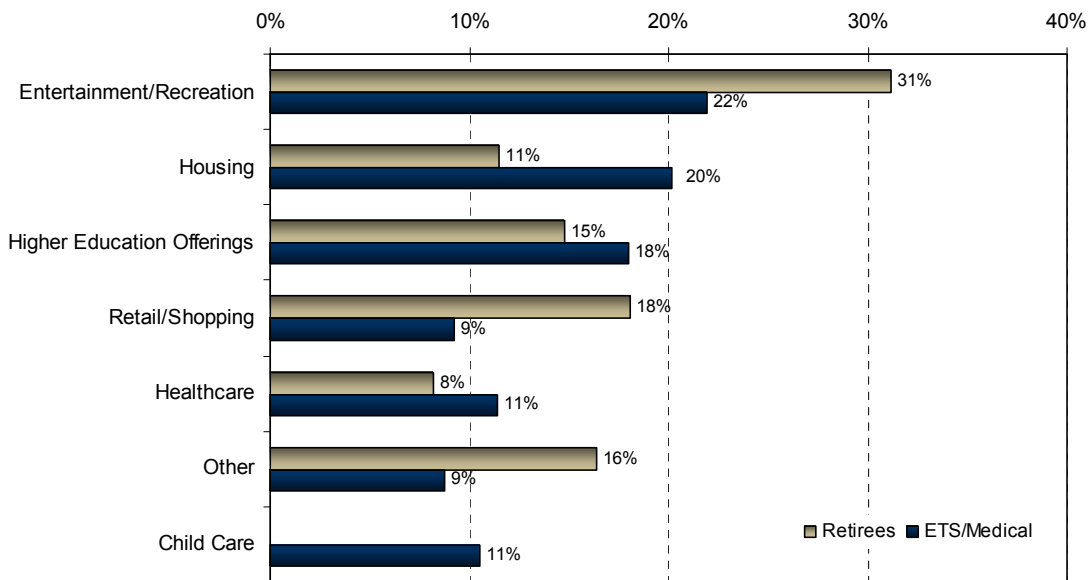


Improvements to entertainment and recreation in the region were cited most often by soldiers as the quality of life factor that would most affect their decision to remain. Improvements to child care were cited least often. Within the “other” category, the soldiers mostly reiterated their desire for higher paying jobs.

**Q9: Improvements in which area would most positively affect your long term decision to remain in the region?**



When the results are filtered by reason for leaving the military, the results are somewhat surprising. For example, entertainment and recreation is chosen more frequently by retirees than non-retirees. Conversely, improving the housing stock in the region is the issue most often cited by non-retirees.



## SPOUSES SURVEY

In addition to surveying soldiers in the Fort Campbell region, TIP collected primary data and information on spouses of active duty personnel stationed at the post. The goal of surveying this group was to determine – to the extent possible – the level of underemployment among spouses of Fort Campbell personnel. The questionnaire asked for basic information on such topics as current employment status, educational attainment, professional and technical skills, career aspirations, intent to remain in the region permanently, and views on quality of place issues in the area.

Similar to the military survey, we developed a one-page questionnaire that was placed in the offices of the Family Employment Readiness Program (FERP) at Fort Campbell. The mission of FERP is to “empower job seekers to take control of their personal employment situation by teaching basic job skills that can be used effectively regardless of where they are located.” FERP offers a full range of employment services to family members of active duty military, DOD civilians, and retirees.

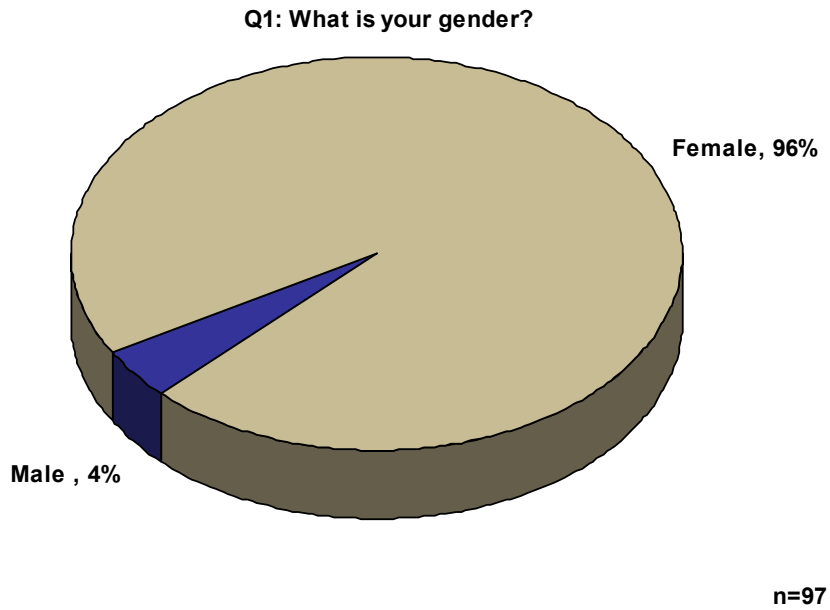
During March and April 2007, 80 respondents completed at least a portion of the spouses survey. The survey questionnaire and the results of the completed surveys are included on the following pages.

SURVEY OF MILITARY SPOUSAL EMPLOYMENT PREFERENCES

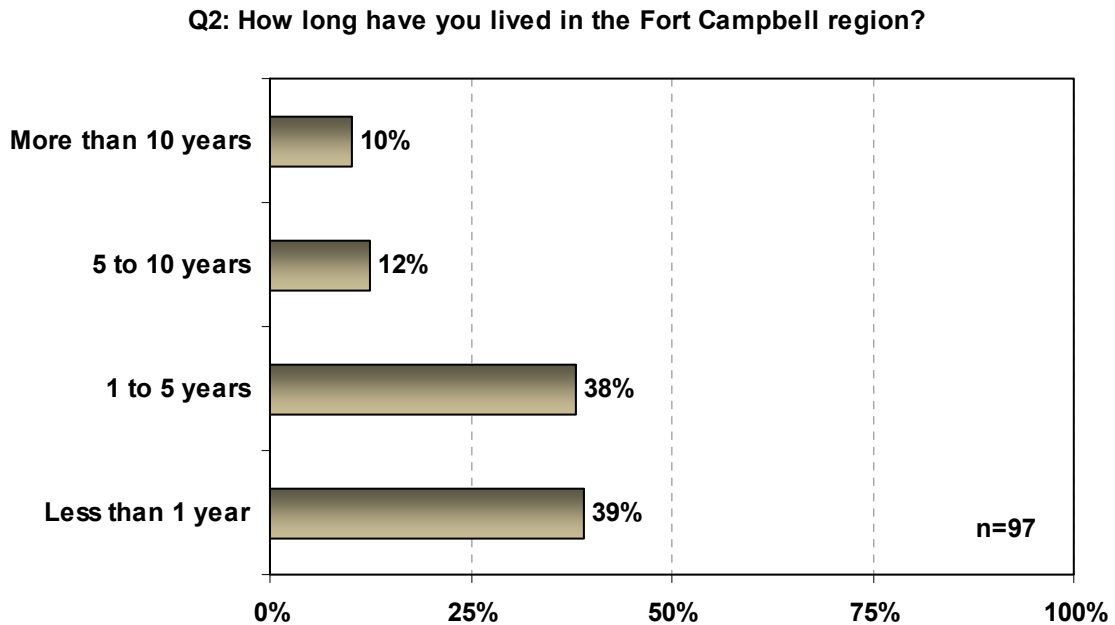
This brief survey is designed to assist economic development and workforce officials in the Clarksville-Montgomery County region in creating expanded employment opportunities for spouses of military personnel stationed at Fort Campbell. Your voluntary assistance in answering the questions below is greatly appreciated.

1. What is your gender?  
 Male                       Female
  
2. How long have you lived in the Fort Campbell region?  
 Less than 1 year               1 to 5 years               5 to 10 years               More than 10 years
  
3. Where do you currently live?  
 On post               Within 10 miles               Within 20 miles               Within 30 miles
  
4. Are you currently employed?  
 Yes                       No
  
- If yes,
  
- 4a. Are you satisfied with your current job?              4b. Does your current job match your experience, skills, or education level?  
 Yes                       No                       Yes                       No
  
5. How long have you been looking for a job?  
 1 to 6 months               7 to 12 months               1 to 3 years               3 to 5 years
  
6. Are you planning to stay in the region (within 30 miles of Fort Campbell) after your spouse's service ends?  
 Yes                       No                       Don't know
  
7. Would you stay in the region (within 30 miles) if desirable employment were available for you and your spouse?  
 Yes                       No                       Don't know
  
8. What is your highest level of education completed?  
 High School/GED               Associates Degree               Masters Degree   
 Some College               Bachelors Degree               Ph.D.
  
9. Please mark any area in which you possess skills or certifications.  
 Advanced Computer/Software   
 Communications/Electronics   
 Education/Teaching   
 Finance/Accounting/Bookkeeping   
 Food Service/Chef   
 Hospitality   
 Manufacturing   
 Marketing/Advertising   
 Medical/Healthcare   
 Sales/Service/Retail   
 Small Business Owner   
 Social Work/Human Services/Public Mgmt.   
 Other \_\_\_\_\_
  
10. What type of employment do YOU desire?  
 Administrative   
 Communications/Electronics   
 Computers/Software   
 Education/Teaching   
 Finance/Accounting/Bookkeeping   
 Food Service/Chef   
 Hospitality   
 Management/Business   
 Manufacturing   
 Marketing/Advertising   
 Medical/Healthcare   
 Sales/Service/Retail   
 Social Work/Human Services/Public Mgmt.
  
11. Improvements in which area would most positively affect your long term decision to remain in the region?  
 Higher Education Offerings                       Housing   
 Child Care                       Healthcare   
 Retail/Shopping                       Entertainment/Recreation

The spouses surveyed at Fort Campbell are almost exclusively female. In fact, only four of the 97 survey participants were male.

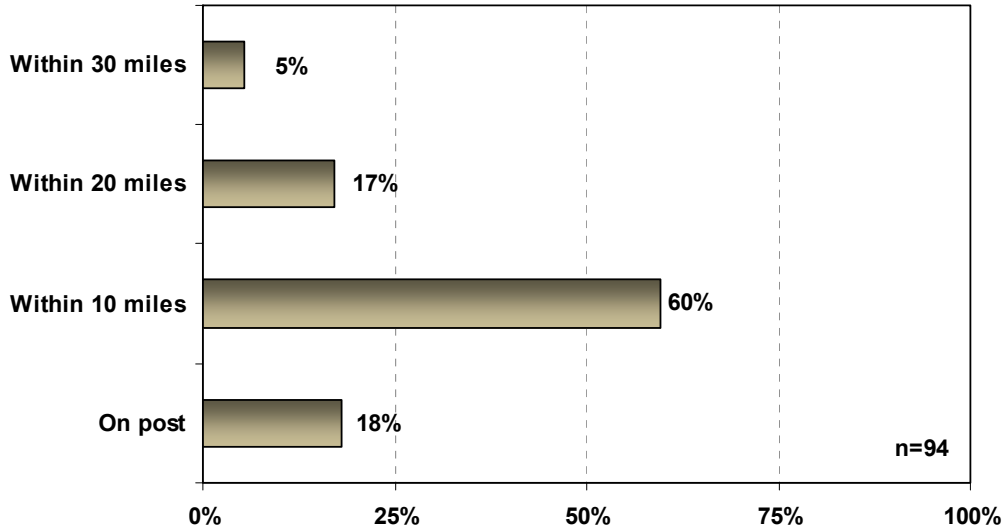


Many of the survey participants were relatively new residents of the region. Over three-fourths of the respondents had lived in the Fort Campbell region for five years or less, with half of that number residing in the area for less than one year.



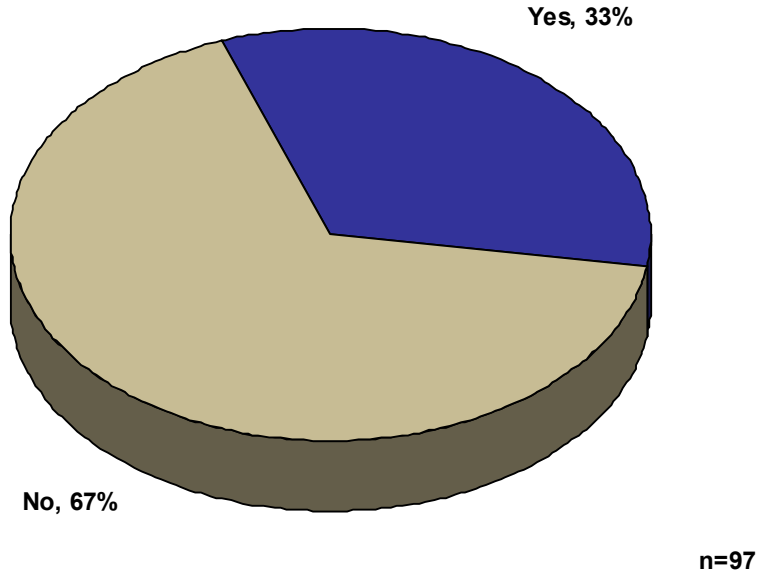
Most of the spouses seeking employment assistance live in close proximity to Fort Campbell. When asked where they live, 58 percent said they live within 10 miles of the post, while another 19 percent lived on the post.

**Q3: Where do you currently live?**



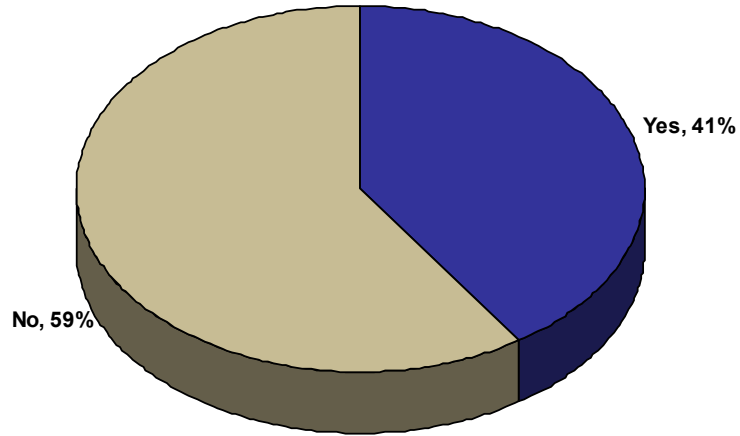
Over two-thirds of the 97 total respondents indicated they are not currently employed. This finding suggests two things: 1) many of FERP’s clients are new to the area and are just getting started searching for a job (see Q7 below) and 2) Fort Campbell spouses are a largely underutilized workforce – an assertion supported by field interviews.

**Q4: Are you currently employed?**



Those respondents who are employed (32) were then asked about their current job satisfaction. Of that group, 59 percent indicated they were not satisfied with their current job.

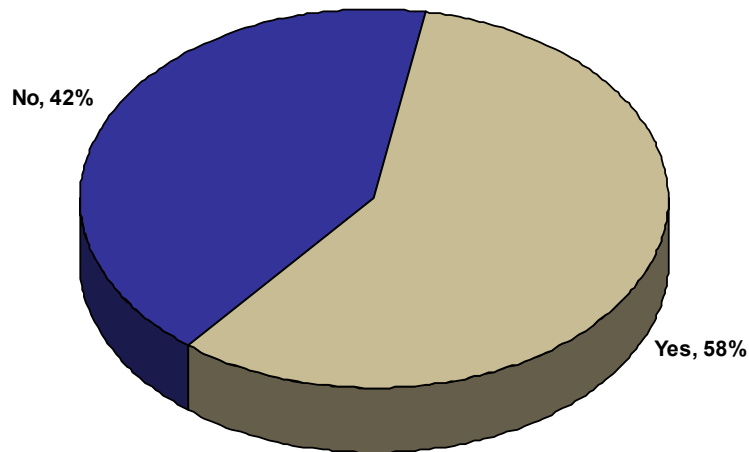
**Q5: Are you satisfied with your current job?**



n=32

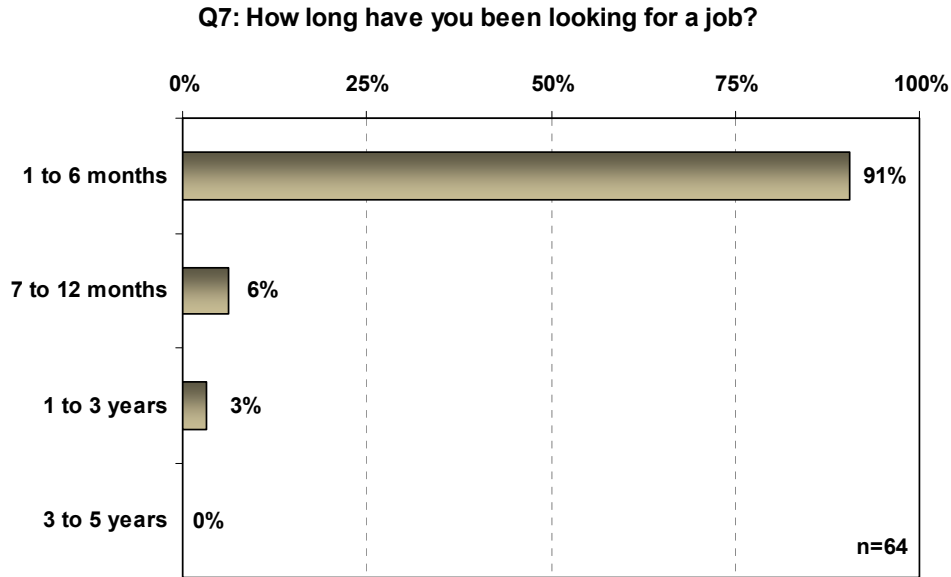
While the majority expressed a lack of satisfaction with their current job, 58 percent of employed respondents felt their jobs matched their experience, skills, and education level.

**Q6: Does your current job match your experience skills or education level?**

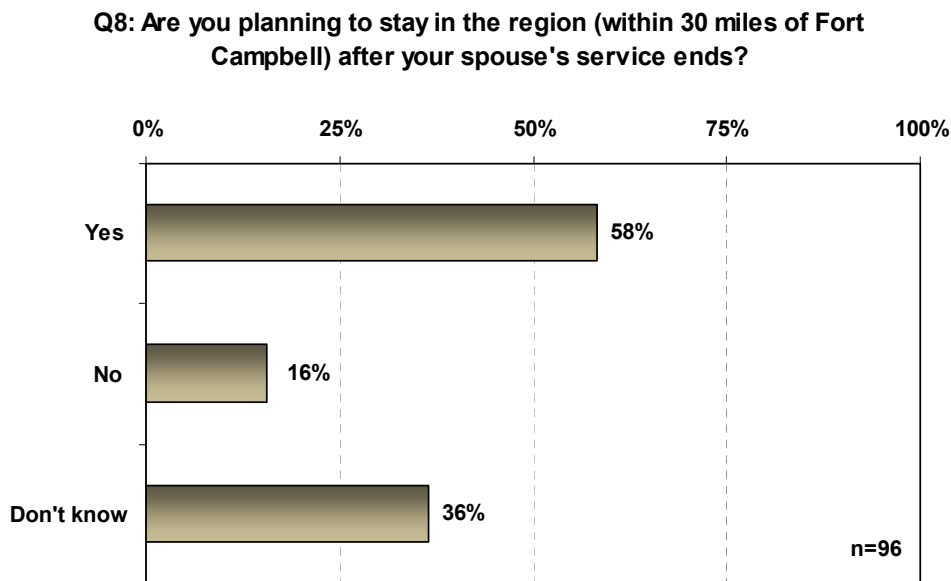


n=31

Two-thirds of all respondents indicated they were actively looking for a job. Of that group, almost all – 91 percent – had been searching for six months or less. This finding supports the notion that there is a continual influx of new talent being added to the area’s potential labor supply.

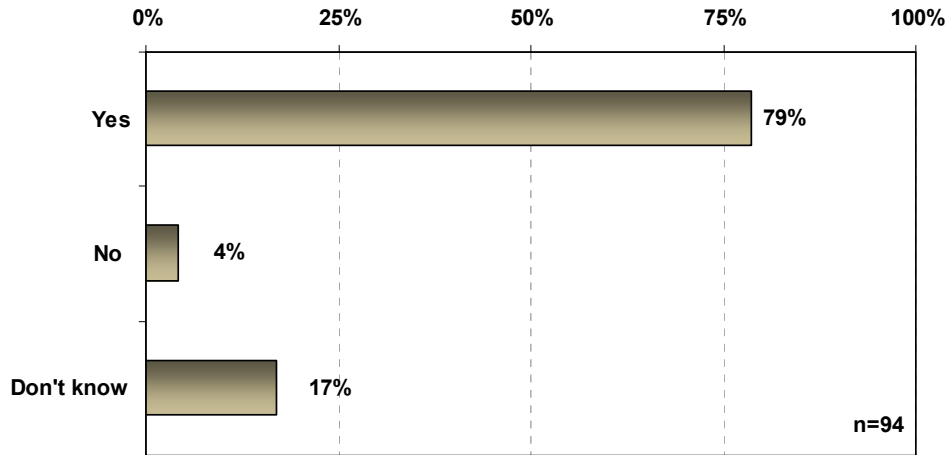


Favorably for the region, almost 60 percent of the respondents said they intended to remain in the Fort Campbell region at the conclusion of their spouse’s military service. Over one-third of the spouses were unsure of their family’s future location plans, while only 16 percent indicated they do not intend to remain in the region.



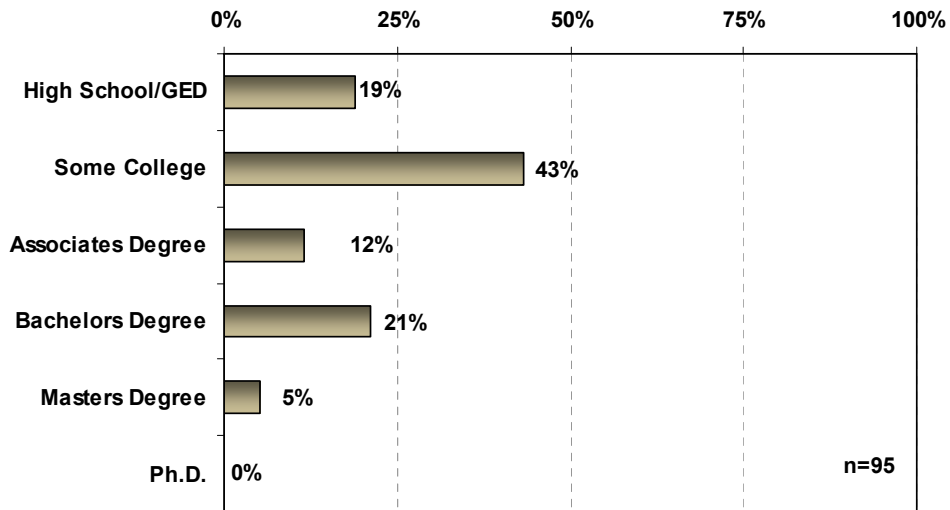
Moreover, when asked if they would be willing to remain in the region if desirable employment were available, almost 80 percent indicated they would stay. Only 4 percent said they would not remain. This data, coupled with the positive response data in the soldier survey, indicate that most military families stationed at Fort Campbell have a favorable view of the region and would remain in the area if they were able to find an acceptable job.

**Q9: Would you stay in the region (within 30 miles) if desirable employment were available for you and your spouse?**



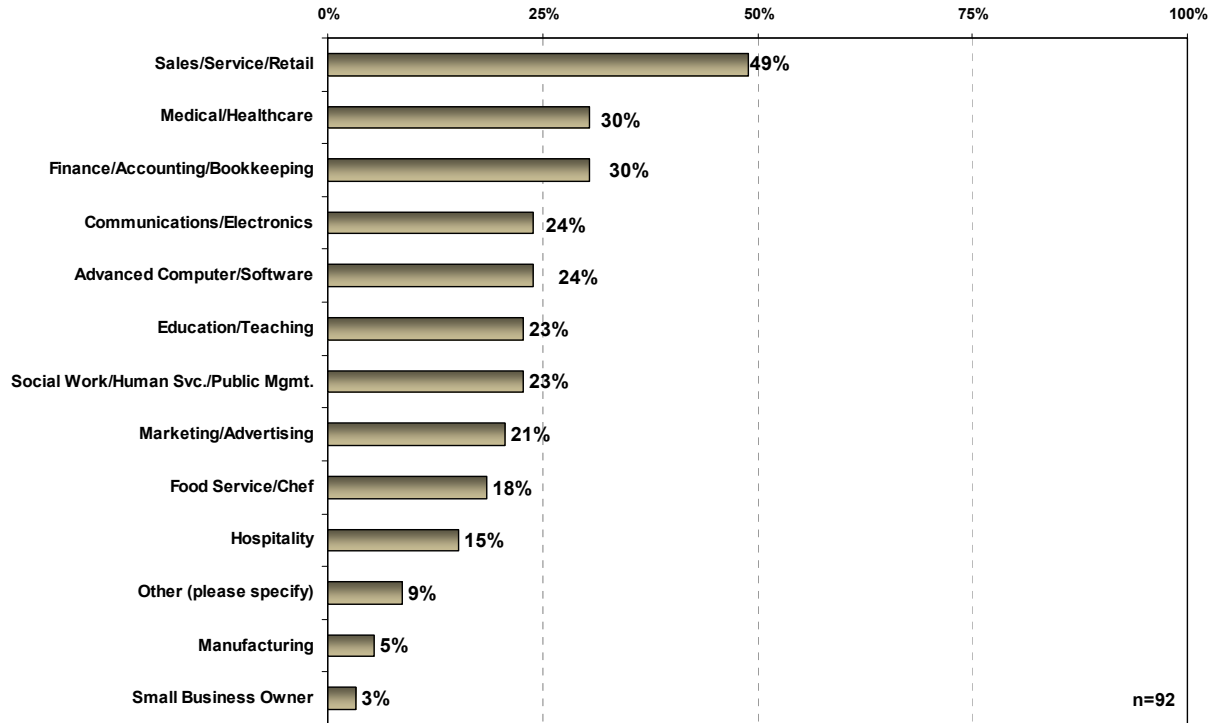
The spouses participating in the survey were relatively well educated. Forty-three percent of respondents reported having some college experience, while another 38 percent had earned a post-secondary degree. In comparison, 26 percent of the population in Montgomery County age 25 or older in the 2000 Census reported earning a post-secondary degree.

**Q10: What is your highest level of education completed?**



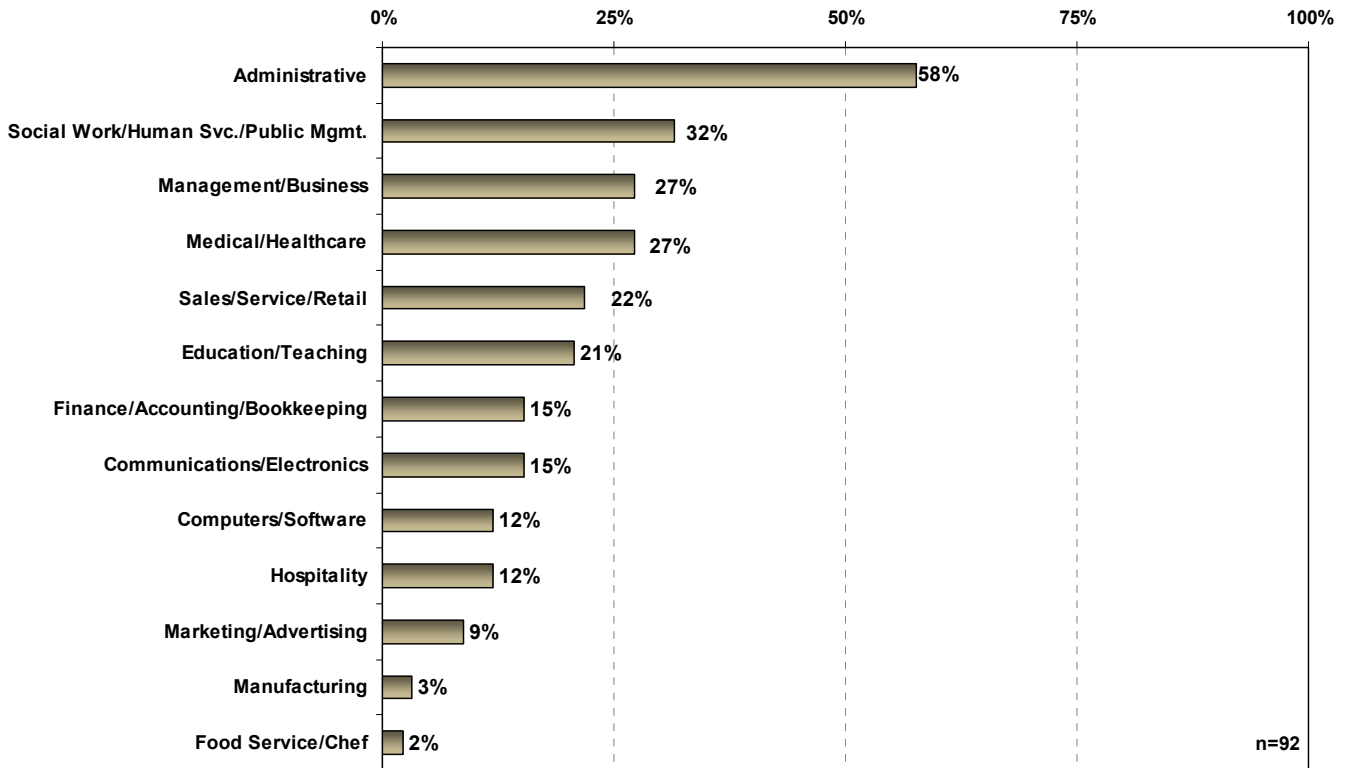
Almost half of the spouses reported some sales/service/retail skills or certifications. Other frequently reported categories include medical/healthcare, finance/accounting, communications/electronics, advanced computer/software, education/teaching, and social work/human services/public management. Skills reported under “other” include logistics, human resources, administrative, and law enforcement.

**Q11: Please mark any area in which you possess skills or certifications.**



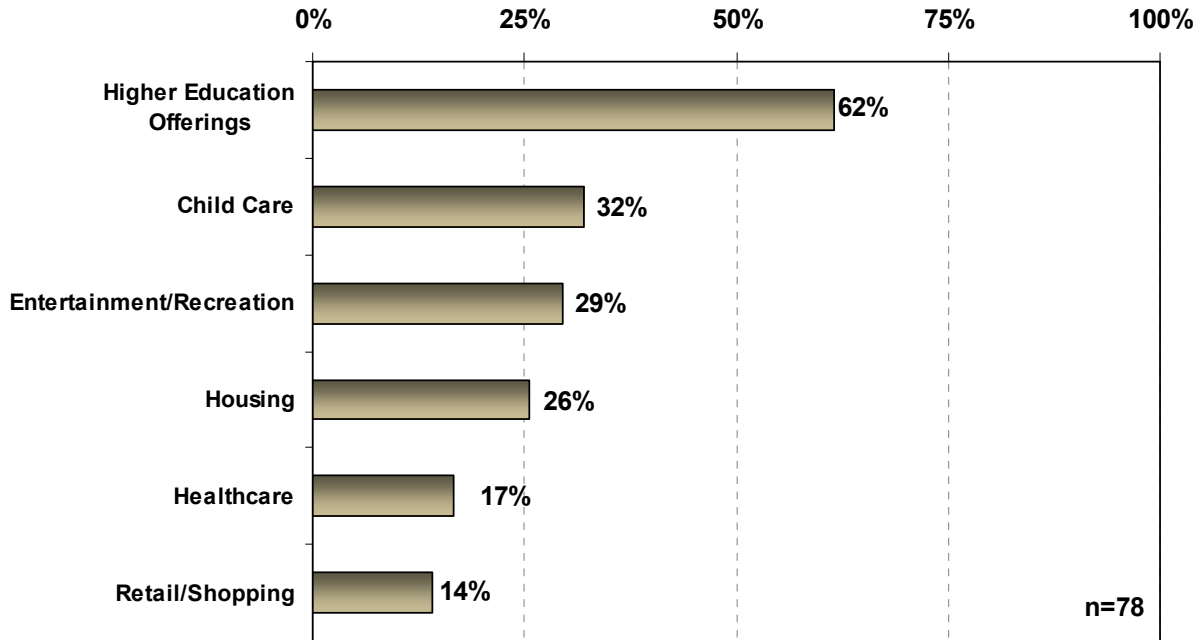
By a significant margin, administrative occupations were the most popular among the respondents. Almost 60 percent of spouses surveyed cited administrative work as their preferred type of employment. Other favored employment areas included social work, management/business, and medical/healthcare. Food service and manufacturing employment were the least desired by respondents.

Q12: What type of employment do you desire?



When asked which quality of life improvements would make them more likely to stay in the region, “higher education offerings” received the highest response rate by a wide margin. This strongly suggests a desire by military families to continue their post-secondary studies and to earn more advanced degrees. The wish for improved child care options and more entertainment and recreation options also ranked high among spouses.

**Q13: Improvements in which area would most positively affect your long term decision to remain in the region?**



# BEST PRACTICES

As part of the workforce assessment phase, TIP conducted interviews with economic development officials and workforce professionals in areas with characteristics that are comparable to Clarksville. The purpose of the interviews was to identify best practices relating to talent attraction and retention. Interviews were conducted in March 2007 with officials in the following areas:

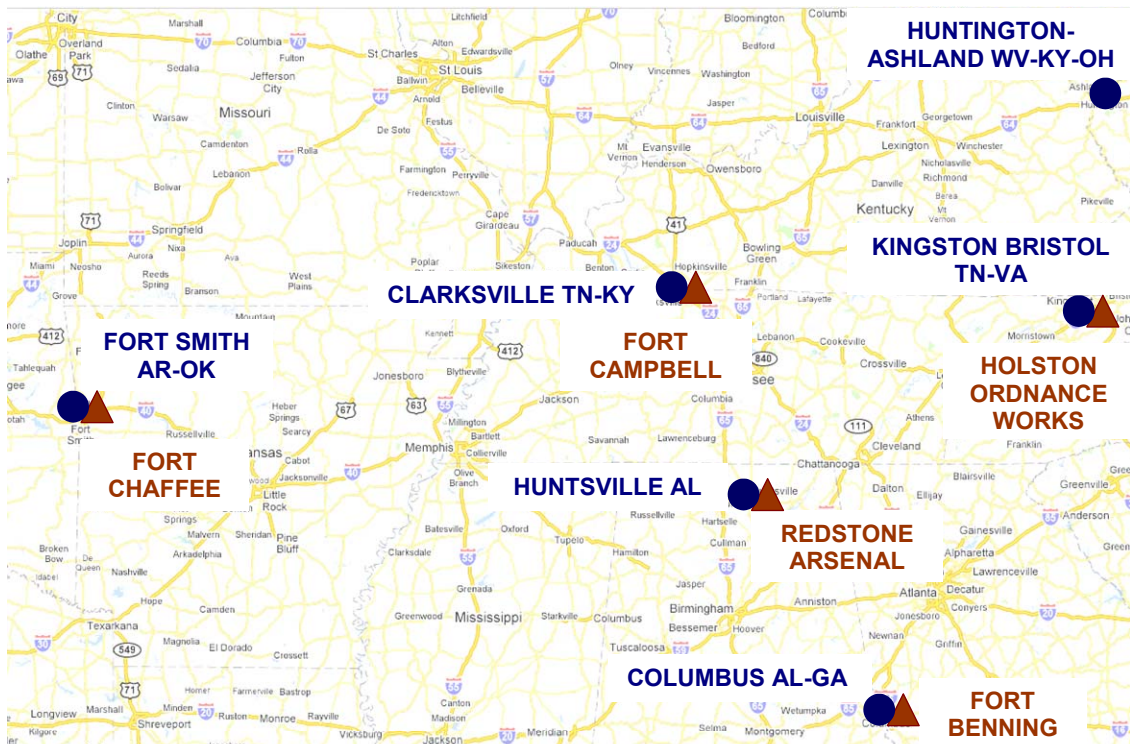
The communities were chosen based on the following criteria:

- 1) location near a military installation, and/or
- 2) a workforce that crosses state boundaries, and
- 3) similar rural/urban composition.

Based on these criteria, the following communities were benchmarked:

- Kingsport-Bristol- Bristol, TN-VA (MSA)
- Huntington-Ashland, WV-KY-OH (MSA)
- Fort Smith, AR-OK (MSA)
- Columbus, GA-AL (MSA)
- Huntsville, AL

**MAP 5: BENCHMARK COMMUNITIES**



To maximize the amount of information collected, we used a guided interview process (see box below). This approach consists entirely of open-ended questions using the questionnaire as a guideline. While the interviewer ensures that all topics are addressed, the interview unfolds as conversation rather than a formal interview. This approach is often preferable for exploratory research.

### **Benchmarking questions**

1. Is the retention and attraction of talent an issue you have identified as being important in your area? If so, how important do you feel this issue is to your economy?
2. What is the most effective program/strategy you have for retaining and recruiting talent in your area?
3. What is the single most important barrier that has been identified in attracting talent to your area? What other barriers exist? (e.g., lack of affordable housing)?
4. Who are your partners in this effort? Do you work with local cities, universities, military bases?
5. Since you are located near a military base, are there any actions to integrate the military community to their greater community? (If applicable)
6. Are you attempting to inventory or capture data on the number of soldiers separating from service through the local military installation, the skill sets they possess, and their career aspirations?
7. Are you doing anything to address underemployment among military spouses?
8. Since your area is cross-jurisdictional (crosses state lines) how have you used this to your advantage and what have been some of the challenges? (If applicable)
9. Any other comments?

## **KEY FINDINGS**

Interviews with economic development officials for the benchmarking survey suggest the following:

### **PRIORITY**

All of the communities contacted for the benchmarking survey view workforce retention and attraction as an area of concern, although some communities have been more aggressive in terms of understanding the problem and collaborating with other agencies to address it.

### **MOST EFFECTIVE STRATEGY/PROGRAM**

The programs and strategies cited vary from community, but a common theme was the need to employ a broad-based approach to the issue. It is clear that communities are thinking regionally, looking beyond their borders, and seeing the value in pooling assets rather than competing against their neighbors.

- **Multi-institution higher education center.** Kingsport and Sullivan County view workforce development as a two-part process: recruiting new residents with the skills needed to fill jobs and educating the workforce that exists within their community. Out of a strategic planning effort in 2002, the need to improve the education levels of community residents was identified as an economic development strategy. A group of city officials and private citizens spearheaded this

issue, resulting in a recommendation to establish a higher education center. The center would combine the resources of various colleges and universities under one roof. To date, more than six higher educational institutions from both Virginia and Tennessee have expressed an interest in the initiative. The center is being modeled, in part, after a multi-college higher education center in Greenville, SC, where several different colleges offer associate, bachelor's, and master's degrees at one location. The \$12 million, 50,000 square-foot center would be located in downtown Kingsport, which will also add to the revitalization of downtown. In March 2007 a resolution was approved to move forward with the project. The resolution calls for up to \$2.5 million to be budgeted for architectural and engineering services and any potential land acquisition.

The committee's vision is for Northeast State Technical Community College to operate the facility and offer the first two years worth of core courses to students. Participating universities and colleges would then offer their bachelor's and master's programs. Degrees would be in the name of the university offering the program. Classes would be offered in sequence in order for students to obtain a degree in a specified amount of time. This program is in the development phase.

In order to better serve active and retired military personnel and their families, Austin Peay State University has established a full-service extension campus on the grounds of Fort Campbell. **The Austin Peay Center at Fort Campbell** offers a flexible array of full-credit day, night, weekend, and online classes as well as four accelerated eight-week terms. While also serving non-military area residents, the program is structured around meeting the demanding training and work schedules of soldiers and their families. The modern facility includes SMART classrooms, a library, a bookstore, and distance learning equipment and technology. The program provides discounts to military personnel and their families as well as in-state (Tennessee) tuition rates to residents of seven Kentucky counties.

- **Integrated stakeholder approach.** The Huntsville (Alabama) Chamber of Commerce's Workforce Division is charged with ensuring that a labor force with the skills and education to meet employment demands of the 21st century is available. The Chamber houses the Workforce Coalition which includes representatives from industry, education, community organizations, media, health and social services, and other entities with an interest in workforce. When the Chamber created its Workforce Division, the Marshall Space Flight Center transitioned responsibility for the Integrated Stakeholder Coalition for Workforce Development (ISCWD) to the Workforce Division. The ISCWD was formed in 2004 to address national trends and issues associated with workforce at a local level. The Chamber's website has a page for coalition information sharing such their recent board forum titled "Southern Growth Policies: Building the Next Southern Workforce."

**Workforce Essentials, Inc.** serves a nine-county region in Tennessee with employment training and placement services for job-seekers and employers. The private, non-profit organization is supported by a mix of public and private funds. Services provided to employers include screening, recruitment, job matching, job training reimbursements, and new employee support. Job-seekers have access to career counseling, placement services, and job training. Workforce Essentials, Inc. is led by a diverse group of public officials and business leaders in the region. One of the organization's major efforts is to develop and foster alliances among public, private, educational, charitable, and economic development organizations in the region. For example, one focus is to educate private employers on their services and demonstrate "what's in it for them."

- **Benchmarking.** One of the successful tools of the Huntsville Chamber of Commerce is the 2006 Benchmark Scorecard. This marketing piece is a straightforward annual comparison of the Huntsville metro economy with the national economy, as well as that of the state of Alabama and other selected benchmark communities. The Huntsville Chamber of Commerce is continually benchmarking itself with other communities. Chamber members make an annual trip to view the successes of other communities. So far they have visited Austin, Raleigh-Durham, and San Antonio.

The Clarksville Economic Development Council produces and presents an Annual Investor Report to the **Aspire Clarksville Foundation**. Aspire Clarksville is a privately funded economic development and community marketing initiative serving Clarksville-Montgomery County, Tennessee. As part of the annual report, the Clarksville EDC reports various economic benchmarks for the community.

In addition, the **Clarksville Area Chamber of Commerce** has an inner-city program in place in which local officials visit other communities to identify best practices and ideas that might be applied in Clarksville. In September 2007 chamber officials will visit Louisville, KY.

- **Partnering with the private sector.** The Education and Workforce Development Department of the Greater Columbus Georgia Chamber of Commerce is striving to strengthen the business and community relationship with their schools through new and innovative partnerships and initiatives. In response to the need for greater workforce preparation, the Greater Columbus Georgia Chamber of Commerce formed the Partnership for Workforce Development. The Partnership consists of business, community, and educational leaders seeking to support the region's educational systems and ensure the region's current and future workforce. This department acts as an advocate for pro-business policies and legislation that promote economic growth.

Some of the initiatives of the Partnership for Workforce Development include:

- *Career Connections* is a regional speaker's bureau whose goal is to deliver a uniform and consistent message to students that their choices and behavior in school have a direct impact on their future work habits. The program assists students in understanding the connection between what is expected at school and what will be expected at work.
- Dual Enrollment Programs offer high school students the ability to simultaneously earn college and high school academic credits while learning practical work skills and ethics. Programs are designed and developed based on the skills needed by area businesses. Dual enrollment programs are taught onsite at the schools by a Columbus Technical College instructor. A wide range of programs are currently available at the Columbus Technical College.
- *Valley Promise* is the greater Columbus region's commitment to developing and sustaining a highly qualified and skilled workforce through education, training, and dynamic partnerships.

*Work Ethics Curriculum* – to be successful in any career, both strong occupational skills and good work habits are essential and need to be incorporated into the high school curriculum. Work Ethics training addresses Attendance, Character, Teamwork, Appearance, Attitude, Productivity, Organization, Communication,

Cooperation, and Respect skills and behaviors. Career Connections volunteer speakers incorporate work ethics into their student presentations.

- *Partners in Education* – the mission of *Partners in Education* is to enhance the quality of education for citizens by establishing and maintaining dynamic partnerships throughout the Greater Columbus Region.

The Clarksville Area Chamber of Commerce also operates a *Partners in Education* program.

## PARTNERS

The communities that reported the most success in tackling “the talent issue” were those that have worked regionally and collaboratively with stakeholders. Stakeholders can include chambers, regional partnerships, educational providers, area hospitals, and businesses. The following are a few examples of programs and initiatives that target talent retention and attraction.

- **Former residents.** The Bristol Virginia Economic Development Committee participates in *Return to Roots* ([www.returnToRoots.org](http://www.returnToRoots.org)). This is a campaign aimed at the estimated 15,000 high school alumni who leave the Southwest Virginia region, including Buchanan, Dickenson, Lee, Russell, Scott, Smyth, Tazewell, Washington, and Wise Counties and the cities of Bristol and Norton. The campaign seeks to match companies in the area to those who want to return to the region or those who want to relocate. *Return to Roots* is funded by a special projects grant from the Tobacco Commission. The project received its impetus from a series of events. Southwest Virginia is exploding with new job opportunities that need people willing to locate to the region. Companies in Southwest Virginia need to find consistent skilled workers for its job opportunities. Jobs such as computer programmers, network technicians, database administrators, as well as industrial, mechanical and electrical engineers, electricians and welders are just a few of skilled job opportunities needing to be filled. The Commonwealth of Virginia also received a commitment from Northrup Grumman and CGI to locate facilities in Lebanon, VA.

Other partners include the local K-12 school system and area colleges and universities.

- **Education support.** Kingsport started a unique program, *Educate and Grow*, which provides two years of tuition assistance at Northeast State Technical Community College. Kingsport leaders recognized the need to improve the education levels of city residents as a means to further economic development. Improving the overall educational level of the area's labor force and expanding opportunities for job-specific training, especially in technical fields, is expected to make the area more attractive to information-based businesses. Attracting such firms will, in turn, provide job opportunities for graduates of the area's schools. Under *Educate and Grow*, students can complete a two-year associate's degree or earn some credits for transfer to a four-year college. In effect, the two local governments have expanded a conventional K–12 public school program to a K–14 program, with the final two post-secondary years being optional.

Kingsport has expanded on this concept with the Regional Center for Applied Technology (RCAT), a branch of Northeast State Technical Community College. RCAT is part of a long-term strategy to keep talented young people in the Kingsport area.

- **Healthcare.** To attract more physicians, nurses and pharmacists to the area, the Fort Smith Regional Chamber of Commerce is organizing a group of business and health-care professionals. The Greater Fort Smith Region Health Care Council will address issues related to the recruitment of people to the area's healthcare sector and to develop more healthcare services. Representatives from area hospitals, the City of Fort Smith, and the University of Arkansas at Fort Smith will also participate in the council.

**INTEGRATION OF MILITARY TO THE GREATER COMMUNITY**

Most communities that are located near a military installation have a military liaison. This tends to be a position within a department of the economic development entity or an informal communication channel between the economic development entity and the military post. For example, the Clarksville Area Chamber of Commerce employs a military & government affairs coordinator.

	2006 Population	Military Facility	2005 Military Base Employment	2005 Per Capita Personal Income	2006 Employment	2006 Unemployment Rate
Clarksville, TN-KY MSA	240,500	Fort Campbell	619	\$30,515	101,480	5.5%
Columbus, GA-AL MSA	288,847	Fort Benning	25,573	\$30,265	122,728	5.3%
		Fort Chaffee &				
Fort Smith, AR-OK MSA	288,818	Fort Smith MAP AGS USAF	420	\$26,420	131,541	4.8%
Huntington-Ashland, WV-KY-OH MSA	285,475	na	na	\$25,701	125,574	5.2%
Huntsville, AL MSA	376,753	Army Redstone Arsenal	9,247	\$33,403	193,939	3.0%
Kingsport-Bristol-Bristol, TN-VA MSA	302,451	Holston Ordnance Works*	200	\$27,079	137,200	4.6%

\*operated under contract by BAE Systems

Sources: US Census, US Dept. of Defense, US Bureau of Economic Analysis, BLS Annual Averages

- **Community defense support partnership.** Located near the Fort Smith MSA, Fort Chaffee is an Army reserve post that currently employs 700 National Guardsmen, with another 300 troops expected to be added in the near future. The Fort Smith community has launched a community council patterned after a Little Rock model. The Little Rock Air Force Base Community Council (previously known as the Pulaski County Citizens Council) is the evolution of a committee of citizens from central Arkansas who raised private funds to purchase land that was donated to the U.S. Air Force, which then established Little Rock AFB in central Arkansas. In a recent luncheon of the Little Rock Air Force Base Community Council, the Air Force Quality of Life Southeast Regional liaison and a member of the Department of Defense-State Liaison Office briefed the council about USA4MilitaryFamilies.org, a new Department of Defense program. The mission of USA4MilitaryFamilies.org is to develop a partnership between state and local government officials, non-profit organizations, and local businesses to ensure the needs of military members and their families are recognized and addressed. The 10 key issues the program has already identified as having a vast impact to the quality of life of today's military families are:

- Care of the Guard
- Assistance to Severely Injured Service Members
- In-State Tuition
- Military Children During School Transitions and Deployments
- Spouse Employment
- Unemployment Compensation
- Payday Lending
- Voting
- Foreign Language Requirements
- Child Care Support for Guard and Reserve Personnel

Through the creation of the community council, Fort Smith is working towards developing an important link between economic development efforts and the needs of the military.

- **Federal & state programs.** The goals of Huntsville Chamber of Commerce's Government Affairs Division are to protect and strengthen federal programs impacting the local economy, pursue the development of infrastructure that encourages business growth, and encourage a cooperative spirit with local governments. The Division works in partnership with U.S. Army's Redstone Arsenal and NASA's Marshall Space Flight Center. The relationship between the chamber, the military, and NASA has been strong and continues to be strong. They operate with an "open

door” policy so communication about economic development goals and the needs of the military are freely shared. The head of the Government Affairs Division attends command group meetings, works on job fairs such as a recent fair focused on employment for military spouses, and works as a team to address common goals of the Chamber and the military.

The Clarksville Chamber of Commerce currently employs a military & government affairs coordinator. This primary responsibility of this position is to serve as a local liaison between the community and Fort Campbell.

## DATA ANALYSIS OF MILITARY ASSETS

Few communities benchmarked for this study have done any data research and analysis of their military assets, particularly with respect to workforce issues. However, Huntsville is currently in the process of collecting data that they anticipate will assist their long-term workforce development planning.

- **BRAC impact.** In Huntsville, the University of Alabama at Huntsville and Alabama A&M University are studying the direct implications of BRAC on their region. This study includes a four-county region and the outcome will identify skills of their workforce. The Huntsville Chamber of Commerce will incorporate the results of this study in their future economic development efforts.

To better understand the impact of Fort Campbell on the regional economy, the regional partners should consider pursuing an Office of Economic Adjustment (OEA) grant from the Department of Defense (see the Recommendations section for further details).

## UNDEREMPLOYMENT OF MILITARY SPOUSES

Many communities we surveyed did not specifically address this issue. A few hold periodic job fairs for military spouses, but it appears to be an area that is untapped in many communities.

## ADVANTAGES AND CHALLENGES OF CROSS-JURISDICTIONAL WORKFORCE

Almost every community official surveyed that has a cross-jurisdictional workforce characterized this issue as a challenge. Some indicated they may pay lip service to the advantages of each community or state, but when a prospect is in the region, competition wins out over collaboration. One of the common complaints was the inability to offer cross-state incentive packages.

- *Advantage Valley* ([www.advantagevalley.com](http://www.advantagevalley.com)) is a confederation of counties, cities, towns, chambers of commerce, and economic development organizations located in 12 counties in West Virginia, Ohio, and Kentucky. The organization’s purpose is to further regional economic development cooperation within the region and includes the Charleston, West Virginia MSA and the Huntington/Ironton/Ashland MSA. Members of the organization operate under the premise that if a company is looking at one community in the region, it is likely to also be considering other communities there; therefore, joint marketing the region as a whole benefits all involved. The organization even employs European-based representatives to market the tri-state region to potential European prospects.
- The Huntington-Ironton Empowerment Zone, Inc. ([www.empowerwv-oh.org](http://www.empowerwv-oh.org)) is another model of regional cooperation crossing state lines. Designated a federal urban empowerment zone in 1999, The Huntington-Ironton EZ is a regional (bi-state) economic development initiative for the cities of Huntington and Ironton, Cabell and Lawrence Counties. The EZ provides the communities it serves with additional tools for economic growth and revitalization. Its vision is to educate, employ, and empower families by focusing on new job creation; creating new business

and industrial sites; training its workforce; and improving regional infrastructure to complement economic development.

- The Valley Partnership ([www.thevalleypartnership.com](http://www.thevalleypartnership.com)) is a multi-governmental entity created by local governments within a sixteen-county trade area of west central Georgia and east central Alabama. Centered on Columbus, Georgia, the area contains more than 600,000 people and approximately \$7 billion in effective buying income. Both Georgia and Alabama are very active in recruiting new businesses to this region and have resources dedicated to this effort. While many incentives are geared toward assisting companies in establishing business in the state, others are geared toward helping existing companies with their expansion needs. Of all the websites we viewed this was the only one that clearly showed incentives for more than one state.
- In Fort Smith, (their MSA reaches into Oklahoma) there has historically been a natural distrust of regional cooperation. Local community and economic development officials are working on educating the community and their neighbors that success in Fort Smith can mean good things for the region. The Fort Smith Chamber of Commerce website very boldly markets the “greater Fort Smith region” which is important in getting this message across.
- The Huntsville Regional Economic Growth Initiative (HREGI), part of Huntsville’s Chamber of Commerce, states as one of its guiding principals that “The concept of regional economic development will not only be a theory or lip service, but will be put into practice. It is an integral element to our future success.”

## BARRIERS

Several communities stated that some of the largest barriers to attracting and retaining talent are their rural location and lack of “big city” amenities. The outward perception of a rural community in the South is a barrier that many communities are grappling with. Some see the rural south as “lacking entertainment, vitality” so small towns are passed up for more populated, larger metro areas.

- **Population and critical mass** is a challenge for Huntington, which has a city population of only 50,000 and the metro area 300,000. The first biotechnology research company spawned from research conducted at Marshall University and a local commercialization program has located in Huntington. However, the firm and the community are struggling to compete with companies located in such cities such as Boston to attract talented researchers.
- **Exposure.** Huntsville has worked hard to “get their name on the map” by staying in constant communication with organizations that compile nationwide reports, networking at all times (you never know who you will sit next to on a plane), and staying current with issues that are relevant beyond the city boundaries. An example of Huntsville’s recent success in this effort is being named as one of the Top 10 Green Cities by *The Green Guide*, an internationally-recognized, source for news and information about environmental living ([www.thegreenguide.com](http://www.thegreenguide.com)). The city is developing a first-of-its-kind industrial park: 100 percent of all water runoff will be bio-filtered with swales, wet ponds and dry ponds. Rooftop runoff is separated from parking and street runoff to capture pollutants on site before they reach the subsurface aquifer. Each year, *The Green Guide* recognizes cities in the nation that offer the healthiest, most environmentally-conscious, energy-efficient, and least-polluting places to live. For the study, the organization surveyed the 251 metropolitan areas in the U.S. with populations of 100,000 or more.

Other barriers cited by communities include low educational attainment, lack of qualified labor pool, lack of strong primary and secondary education, lack of housing supply, and training in the high-tech industry but a lack of jobs for graduates.

## COMMUNITY AUDIT

### Community Labor Market Audit

#### What are the area's demographic characteristics?

- ✓ Clarksville, TN-KY MSA Population Estimates
- ✓ Clarksville, TN-KY MSA Population Projections
- ✓ Population Distribution by Age Cohort, 2005
- ✓ Educational Attainment, 2005

#### What are the region's major industries?

- ✓ Clarksville MSA & Nashville MSA location quotients

#### Who are the major employers?

- ✓ Clarksville MSA major employers

#### What are wage patterns like?

- ✓ Clarksville MSA & Nashville MSA occupational wages

#### What are the major occupational patterns?

- ✓ Nashville MSA occupational structure
- ✓ Clarksville MSA occupational structure
- ✓ Clarksville MSA: focus on production and installation/maintenance/repair occupations

#### What are the commuting and migration patterns affecting the labor force?

- ✓ Net commuter flow into Montgomery County
- ✓ Net migration flow into Montgomery County
- ✓ Income of In-Migrants and Out-Migrants
- ✓ Variations in Incomes of Migrants

#### What are the major economic & demographic characteristics of the labor force?

- ✓ Clarksville MSA: Age profile of recent movers
- ✓ Clarksville MSA: Median age of recent movers
- ✓ Clarksville MSA: Educational attainment by sex
- ✓ Clarksville MSA: Age profile of by employment status
- ✓ Clarksville MSA: Employed civilians by occupational group and sex

#### What are the scenarios for future employment in the region?

- ✓ Baseline & Optimistic Scenarios: Job forecast for the 8-county region
- ✓ Baseline & Optimistic Scenarios: Job forecast for Montgomery & Christian Counties compared

#### What issues did field interviews reveal?

- ✓ Underemployment
- ✓ Geographical disbursement of workers
- ✓ Labor issues or problems of major employers

The purpose of the community audit is to gather primary and secondary data on the economy and labor market of the Fort Campbell region. The resulting information can then be used to support and inform economic development and workforce development programs.

Our approach to the community audit was based on a methodology advanced by the U.S. Department of Labor (U.S. DOL) that examines both the demand and the supply sides of the local labor market. The methodology was developed as part of U.S. DOL's Community Audit Project and is described in the accompanying manual: *Conducting a Community Audit: Assessing the Workforce Development Needs and Resources of Your Community* ([http://www.doleta.gov/layoff/pdf/Conducting\\_a\\_Community\\_Audit.pdf](http://www.doleta.gov/layoff/pdf/Conducting_a_Community_Audit.pdf)).

TIP modified the U.S. DOL methodology to allow for data availability issues as well as to meet the specific goals of the study. The audit incorporates secondary data from state and federal sources as well as primary information provided by local employers and other stakeholders.

The graphic to the left outlines the questions posed by the audit and the variables used to answer them.

## WHAT ARE THE AREA’S DEMOGRAPHIC CHARACTERISTICS?

Recent population estimates from the Census Bureau and state data centers for the Clarksville MSA differ. The 2005 Census Bureau estimate for the MSA shows growth below the national average (1.05 percent), while state estimates are more robust. The discrepancy in the two estimates may be the result of the state data centers having a more detailed knowledge of local-level trends in their states than the Census Bureau. Thus, it may be more likely that population in the Clarksville MSA is indeed growing at a faster pace than the national average.

**FIGURE 1: CLARKSVILLE, TN-KY MSA POPULATION ESTIMATES**

	Census Estimate	TN & KY SDC Estimates
2005 Population	243,665	249,685
2000-2005 Net Pop. Chg.	+11,621	+17,685
2000-2005 CAGR*	0.98%	1.48%

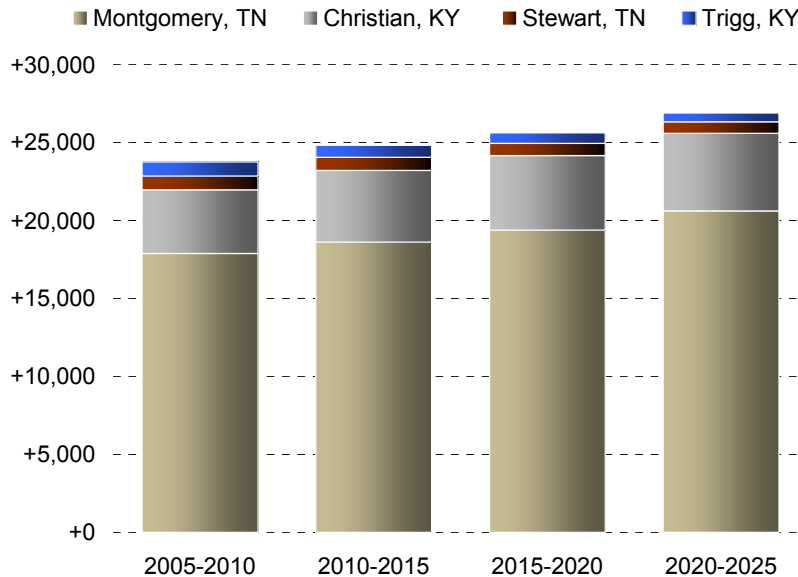
\*U.S. Compound Annual Growth Rate = 1.05%

SOURCES: U.S. Census Bureau; Tennessee State Data Center; Kentucky State Data Center

Figure 2 below illustrates the projected population increase in the Clarksville MSA every five years. The projected net gain for the MSA is over 100,000 new residents by 2025 – or 5,000 new residents annually for the next 20 years. Moreover, the gains are projected to grow larger for each consecutive five-year period, culminating with a net increase of 27,000 residents between 2020 and 2025.

Future population growth in the Clarksville MSA will be fueled primarily by growth in Montgomery County. The Tennessee State Data Center projects Montgomery County alone will grow by over 20,000 new residents between 2020 and 2025.

**FIGURE 2: CLARKSVILLE, TN-KY MSA POPULATION PROCTIONS**

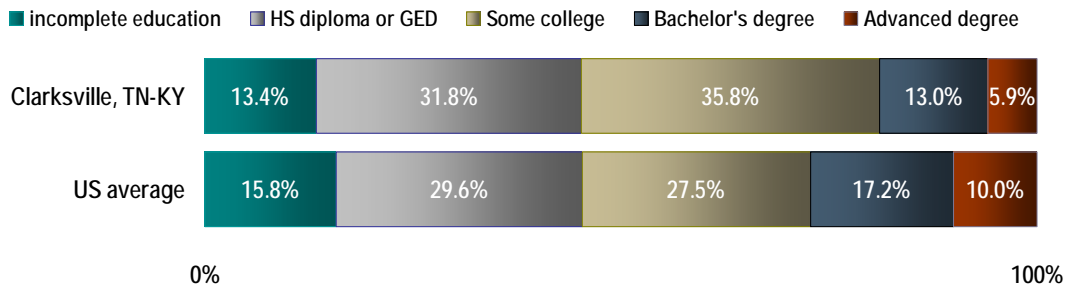


SOURCES: Tennessee State Data Center & Kentucky State Data Center

As the American workforce continues to grow older, the age distribution of an area’s population will become an increasingly important indicator of future available workforce. The Clarksville metro area’s population is more youthful than the U.S. as a whole. In fact, 55 percent of the Clarksville MSA’s population is under the age of 35. Nationally, however, a majority of the population (52 percent) is age 35 and above.

Children under the age of 18 make up nearly 30 percent of the residents in the Clarksville MSA. This is well above the national average. With this demographic distribution, education and public schools will undoubtedly rank at the top of the region’s priorities in the coming years.

**FIGURE 3: POPULATION DISTRIBUTION BY AGE COHORT, 2005**

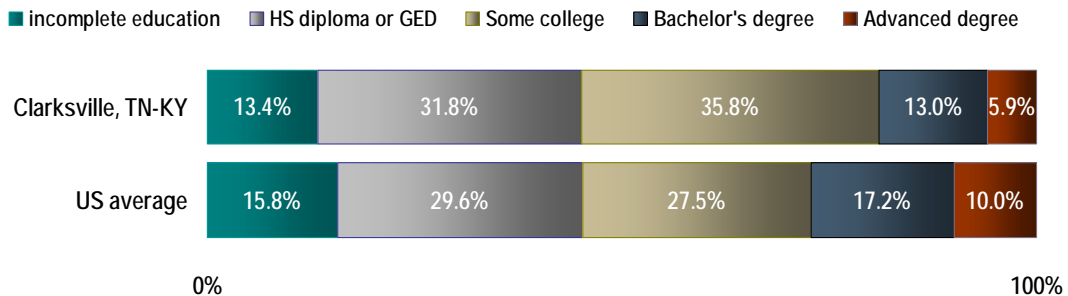


SOURCE: U.S. Census Bureau, 2005 American Community Survey (ACS)

The Clarksville MSA has an unusual educational distribution relative to the nation. While there are fewer people who have completed college, there are also fewer high-school dropouts. This anomaly may be a reflection of Fort Campbell’s influence, which employs several thousand young men and women who have yet to complete college. Regardless, the data suggest a broad middle class that can support an array of skilled occupations. The trend differs somewhat in the rest of the country, with larger shares of adults clustered at each end of the educational spectrum.

**FIGURE 4: EDUCATIONAL ATTAINMENT, 2005**

*Highest Level of Educational Attainment for Those Age 25 or Older (Percent of Total)*



SOURCE: U.S. Census Bureau, 2005 American Community Survey (ACS)

## WHAT ARE THE REGION’S MAJOR INDUSTRIES?

Fort Campbell dominates the job base in the Clarksville MSA, with federal government jobs (both military and civilian) scoring very high location quotients. Agriculture and manufacturing were the only other industry sectors in the Clarksville MSA to score location quotients above 1.00.

**FIGURE 5: REGIONAL INDUSTRY CONCENTRATIONS**

	Clarksville MSA	Nashville MSA
Federal government (military)	15.53	0.48
Federal government (civilian)	2.35	0.74
Agriculture	1.77	1.09
Manufacturing	1.27	1.05
Retail trade	0.95	0.99
Administrative services	0.95	1.24
Accommodation & food services	0.86	1.10
State & local government	0.85	0.76
Personal services	0.81	1.03
Construction	0.77	0.95
Health care & social assistance	0.73	0.93
Real estate	0.65	0.99
Wholesale trade	0.50	1.13
Finance & insurance	0.47	1.01
Educational services	0.43	1.50
Arts, entertainment, & recreation	0.39	1.38
Information	na	1.14
Professional & technical services	na	0.90
Transportation & warehousing	na	na
Headquarters & regional offices	na	na
Forestry & fishing	na	na
Mining, oil, & gas	na	na
Utilities	na	na

SOURCE: U.S. Bureau of Labor Statistics; TIP Strategies calculations

Data for Nashville are provided for comparison purposes. The Nashville MSA borders the Clarksville MSA to the south, but Nashville's industry structure is noticeably different. The arts, entertainment, & recreation sector scores high because of the music industry. Likewise, Vanderbilt University helps boost the educational services LQ above the U.S. average. A surprise on the list may be administrative services with a strong LQ of 1.24; however, this is likely the result of Nashville's role as a major U.S. administrative service center for healthcare management. Many of the companies involved directly (or indirectly) in HMO processes or U.S.

hospital-chain management have a presence in Nashville. Also, the slightly-above-average LQ of 1.05 for manufacturing is something that might have been unexpected in Nashville just 20 years ago. However, new assembly operations for Nissan, Dell, and GM's Saturn division have all sprung up in recent years – along with a trail of related suppliers.

The complementary nature of the Clarksville and Nashville economies can be looked upon as a regional asset, as it offers numerous options for future growth.

### UNDERSTANDING LQs

A location quotient (LQ) is calculated as a local industry's share of total local employment divided by the same industry's share of employment at the national level:

$$LQ = \frac{\text{Local jobs in industry} / \text{Total local jobs}}{\text{U.S. jobs in industry} / \text{Total U.S. jobs}}$$

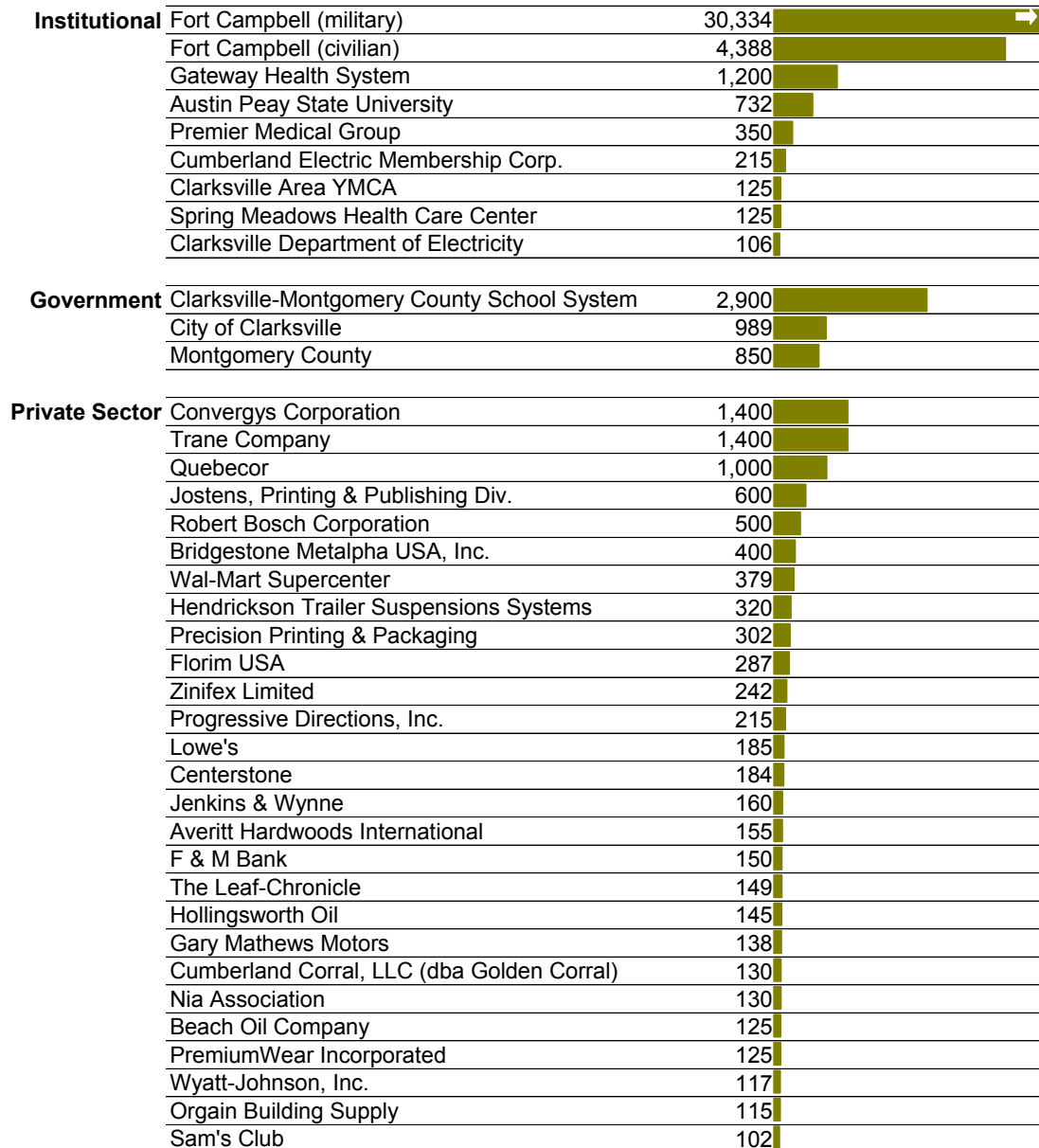
If the local industry and national industry are perfectly proportional, the location quotient will be 1.0. If an industry is heavily concentrated at the local level (e.g., automotive industry in Detroit, technology in Silicon Valley, gambling in Las Vegas), then the location quotient will be higher than 1.0. Conversely, if the industry is sparsely concentrated at the local level (e.g., farming in New York City, convention tourism in North Dakota), the location quotient will be lower than 1.0.

## WHO ARE THE MAJOR EMPLOYERS?

Lists of top employers can often look surprisingly similar, but when these major driver's of the local economy are broken into groups, certain patterns appear. For example, institutional employers – including military bases, college campuses, health & social service providers, and non-investor-owned utilities – can be grouped together because, like government, they are (usually) a relatively stable, ongoing presence in a community.

Beyond community institutions and government offices, we are left with private-sector employers. These are the major drivers of local economy, of course, because of their dynamic growth possibilities, but they are also the least predictable permanent fixtures in the community. In the Clarksville area, the largest of the private sector employers are generally smaller than the major government and institutional employers. They are also notably diverse, with manufacturers and retailers both adequately represented.

**FIGURE 6: REGIONAL INDUSTRY CONCENTRATIONS**



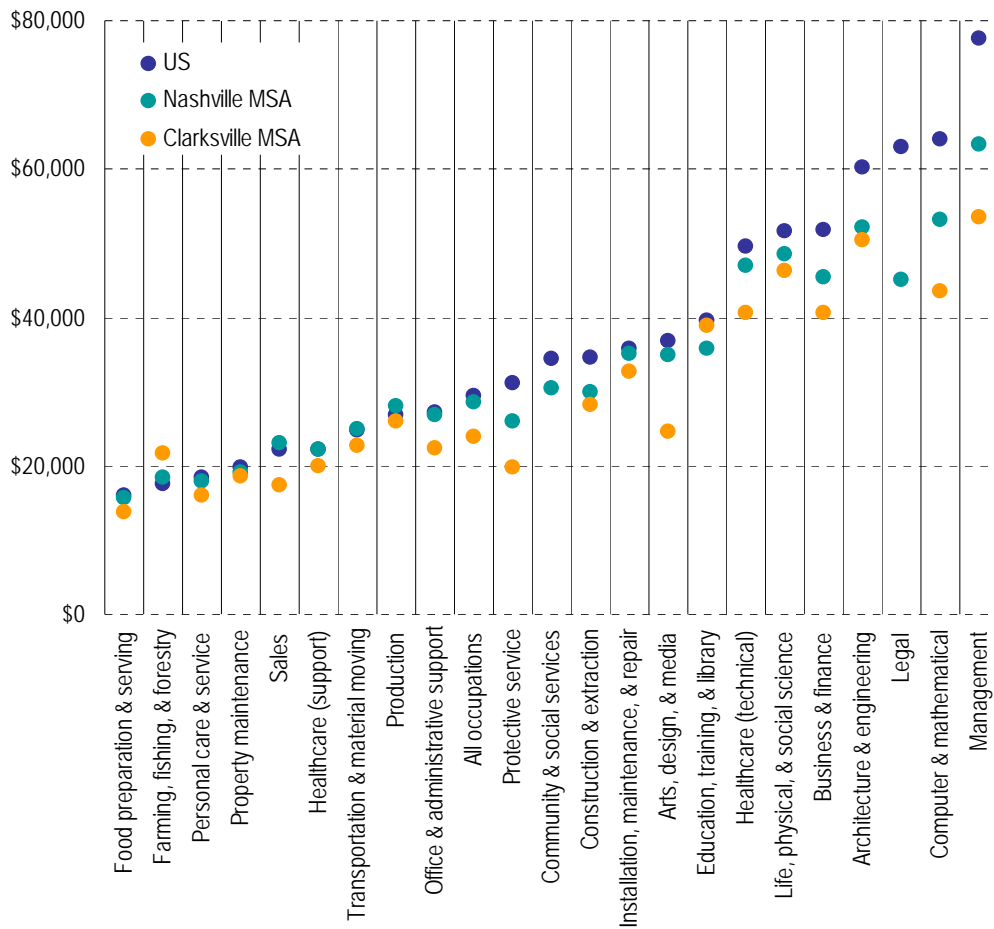
SOURCE: Clarksville-Montgomery County Economic Development Council; Fort Campbell FYE 2006 Employment Report

## WHAT ARE THE WAGE PATTERNS LIKE?

Looking at median annual salaries by occupational groups can yield valuable information about strengths and weaknesses in the local economy. In the lower-paid and lower-skilled occupational groups, the median salary in the Clarksville MSA is very similar to both the U.S. and the Nashville averages. But as the pay and skill level of each occupational group increases, the salary gap for Clarksville's workers begins to widen. The gap is particularly wide for managers and computer specialists.

Occupational groups where Clarksville's workers earn very close to the national average include sales, production, and education.

**FIGURE 7: MEDIAN SALARY BY OCCUPATIONAL GROUP**



Source: U.S. Bureau of Labor Statistics

## WHAT ARE THE MAJOR OCCUPATIONAL PATTERNS?

At first glance, the LQs for occupational groups may look like the LQs for industry groups, but a closer look reveals something else. An accountant or an engineer or a network administrator, for example, could work in any industry sector – government, manufacturing, or business consulting services. However, when we separate these occupational groups from their industries and calculate LQs, it is possible to see new patterns.

In Nashville, these occupational concentrations include arts & media (boosted by the music industry), production (boosted by manufacturers like Nissan, Dell, and Saturn), and office & administrative support (associated with healthcare and hospital-chain administration, among other things). These are all patterns that appeared in the industry LQs; however, there is a notable difference in education. As an industry, educational services has a high LQ, but as an occupational category, it does not. This is most likely an indicator that the educational institutions in the Nashville area employ a wide range of occupations and activities beyond classroom instruction and library services. There is also a strong concentration of management occupations in the Nashville area that was not immediately obvious in the industry LQs. Again, this could be due to the presence of national healthcare and hospital-chain companies operating in the Nashville area.

**FIGURE 8: OCCUPATIONAL EMPLOYMENT IN THE NASHVILLE MSA**

Occupational Group	Employment	Location Quotient
Office & administrative support	135,670	1.07
Production	70,550	1.24
Sales	67,930	0.88
Transportation & material moving	62,670	1.18
Food preparation & serving	60,980	1.02
Management	46,760	1.42
Healthcare (technical)	41,720	1.15
Education, training, & library	35,640	0.80
Installation, maintenance, & repair	32,480	1.10
Construction & extraction	30,770	0.87
Business & finance	24,260	0.81
Property maintenance	21,310	0.89
Healthcare (support)	14,260	0.76
Computer & mathematical	13,560	0.83
Protective service	13,400	0.79
Personal care & service	11,510	0.65
Arts, design, & media	11,160	1.20
Architecture & engineering	10,460	0.79
Community & social services	7,880	0.84
Legal	5,080	0.93
Life, physical, & social science	3,810	0.58
Farming, fishing, & forestry	540	0.22

SOURCE: U.S. Bureau of Labor Statistics; TIP Strategies calculations

Clarksville's occupational LQs differ significantly from Nashville. While managers are plentiful in Nashville, the LQ in Clarksville is slightly below average. On the other hand, Clarksville has a very high LQ for production occupations as well as installation, maintenance, and repair occupations. Occupations in both of these groups typically pay reasonably well and require modest educational levels and solid experience. Occupations in education and training also score an above-average LQ. Here, too, pay is typically solid but require a moderate to high level of educational attainment for entry level positions.

Clarksville's LQs for highly skilled occupations involving computers, engineering, and life science are quite low.

**FIGURE 9: OCCUPATIONAL EMPLOYMENT IN THE CLARKSVILLE MSA**

Occupational Group	Employment	Location Quotient
Production	12,350	2.01
Office & administrative support	12,290	0.90
Sales	7,590	0.91
Food preparation & serving	7,340	1.14
Education, training, & library	5,860	1.21
Transportation & material moving	5,490	0.96
Healthcare (technical)	4,430	1.13
Installation, maintenance, & repair	4,270	1.35
Management	3,310	0.93
Construction & extraction	2,480	0.65
Protective service	2,120	1.16
Property maintenance	2,100	0.81
Healthcare (support)	2,090	1.04
Business & finance	1,800	0.56
Personal care & service	1,340	0.70
Architecture & engineering	850	0.60
Computer & mathematical	420	0.24
Arts, design, & media	410	0.41
Life, physical, & social science	260	0.37
Farming, fishing, & forestry	100	0.38
Community & social services	na	na
Legal	na	na

1.00 = U.S. avg.

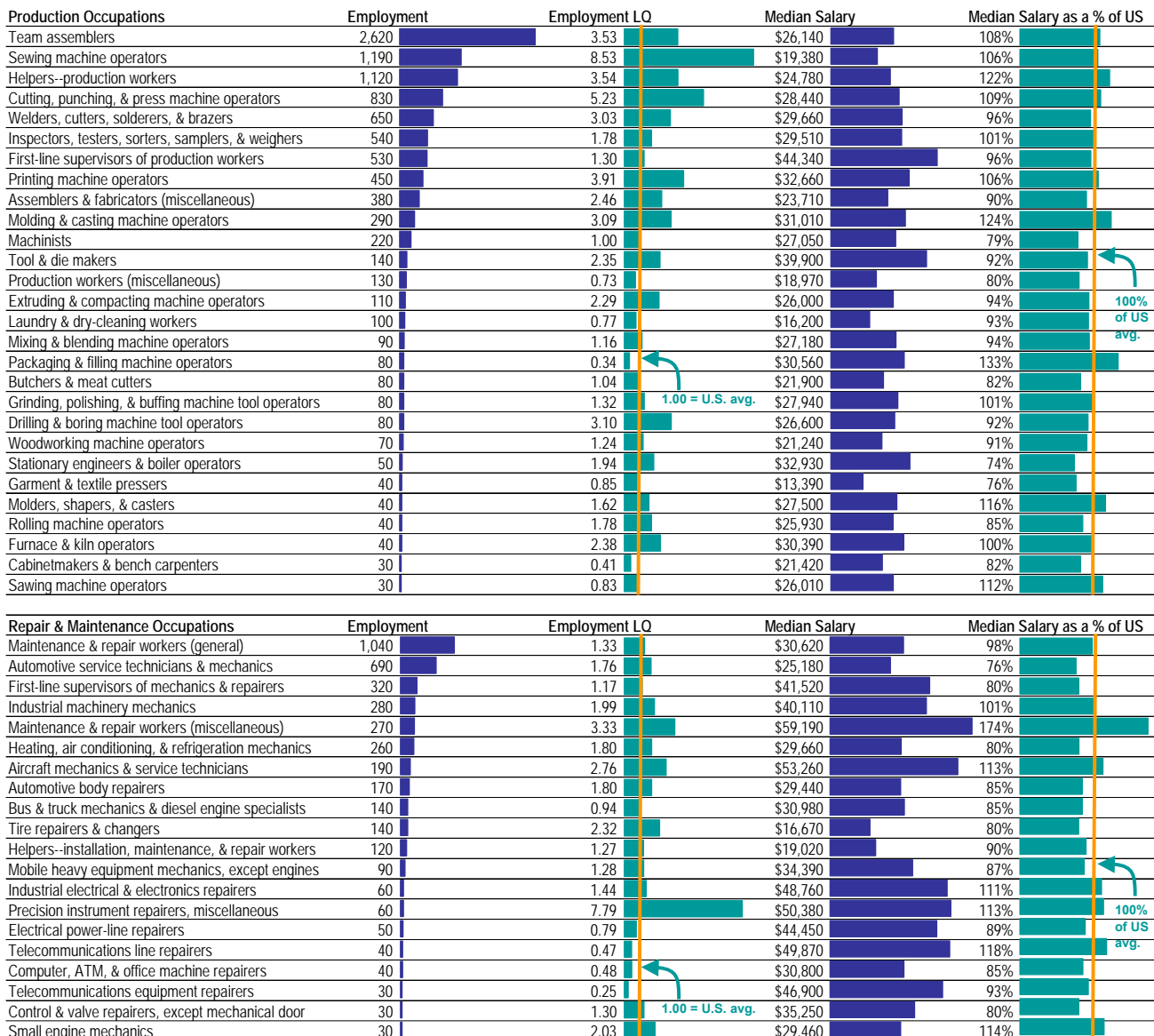
SOURCE: U.S. Bureau of Labor Statistics; TIP Strategies calculations

Clarksville's LQs in two occupational groups – production and installation/repair/maintenance – were quite high, so it is worth exploring and documenting patterns for specific occupations in these groups.

Among production occupations, the jobs that dominate – assembly workers, sewing machine operators, production helpers – are not necessarily highly skilled jobs. However, the next occupations on the list – machine operators, welders, inspectors, supervisors, etc. – all require certain entry-level skills and experience. Salaries in most production occupations are close to the national average. It is worth noting that a handful of Clarksville's production occupations with high LQs – especially tool-and-die makers and welders – are often cited by manufacturers nationwide as scarce or difficult to find. A good concentration of these types of skills can be a regional asset.

Many maintenance and repair occupations also require excellent mechanical skills. Again, the Clarksville area has a good concentration of these types of skills. Pay levels vary significantly depending on skill levels, but in most cases, pay for each of these occupations in the Clarksville area is close to the national average for the occupation.

**FIGURE 10: KEY OCCUPATIONS IN PRODUCTION & MAINTENANCE IN THE CLARKSVILLE MSA**



SOURCE: U.S. Bureau of Labor Statistics; TIP Strategies calculations

## HOW ARE COMMUTING AND MIGRATION PATTERNS AFFECTING THE LABOR POOL?

Daily commuter traffic in and out of Montgomery County is a reflection of the location of major employment opportunities. Three counties in particular are notable. First, Christian County pulls in a net of nearly 14,000 workers daily from Montgomery County. Undoubtedly, this is the "Fort Campbell factor". Second, Davidson County (Nashville) pulls in a net of nearly 5,000 workers a day from Montgomery County. The third big flow is with Stewart County, but in this case the net flow is into (rather than out of) Montgomery County. Stewart sends a net of more than 1,200 workers daily into Montgomery County.

**FIGURE 11: NET COMMUTER FLOW INTO MONTGOMERY COUNTY**

	Direction of Commute		Net into Montgomery
	Into Montgomery	Out of Montgomery	
Stewart County, TN	1,477	245	+1,232
Todd County, KY	529	28	+501
Houston County, TN	477	110	+367
Dickson County, TN	503	286	+217
Trigg County, KY	143	158	-15
Cheatham County, TN	402	847	-445
Robertson County, TN	383	950	-567
Davidson County, TN	403	4,968	-4,565
Christian County, KY	2,080	15,706	-13,626

SOURCE: Clarksville-Montgomery County Economic Development Council; U.S. Bureau of the Census; TIP Strategies calculations

People move long distances for a variety of reasons, but other than retirement and college, the big reason usually relates to job location. Aggregated data for exemptions from U.S. tax returns can tell us a lot about movement into and out of a county over time. Because of Fort Campbell, there is a significant amount of movement into and out of Montgomery County each year from places far away.

There is also a fair amount of movement into and out of counties in the surrounding region. Davidson County is the primary destination of Montgomery's out-movers, based on the counties we reviewed. It is notable, however, that the annual net out-migration to Davidson County has not shifted significantly in the most recent seven-year period we examined.

The other big migration flow is with Christian County, but in this case the pattern has shifted dramatically in the past seven years. What was once a significant outflow of Montgomery County residents has dwindled in recent years and by 2005 had reversed to become an inflow into Montgomery County.

**FIGURE 12: NET MIGRATION INTO MONTGOMERY COUNTY**

Net Migration into Montgomery County by Place of Origin								
Origin:	1999	2000	2001	2002	2003	2004	2005	1999-2005 avg
Tennessee	-349	-243	-403	-169	-38	-65	-467	-248
Another U.S. State	-130	+309	-709	-229	+651	+980	+3,845	+674
Another Country	+878	+700	+492	+473	+519	+758	+626	+635
Non-Movers	90,374	93,360	95,710	96,437	97,433	100,750	104,755	+96,974
Net Migration into Montgomery County From Nearby Counties								
Origin:	1999	2000	2001	2002	2003	2004	2005	1999-2005 avg
Houston County, TN	-6	+59	+28	+9	-7	+44	+27	+22
Cheatham County, TN	+14	+78	-48	+68	+67	-22	-23	+19
Dickson County, TN	+33	-10	-25	+23	+52	+46	-28	+13
Todd County, KY	-10	+94	+1	-25	-22	+26	+6	+10
Robertson County, TN	-19	+31	-11	-4	+73	+24	-50	+6
Trigg County, KY	na	+11	+0	-3	+6	na	+3	+3
Stewart County, TN	-74	-64	-77	-8	-38	-8	-29	-43
Christian County, KY	-348	-408	-681	-342	-36	-2	+951	-124
Davidson County, TN	-116	-209	-197	-115	-130	-104	-240	-159

SOURCE: U.S. Internal Revenue Service; TIP Strategies calculations

\*Based on changes in the number of exemptions claimed and the place of residence claimed from one year to the next

Three tables below show the corresponding median adjusted gross income (AGI) reported on tax returns for movers into and out of Montgomery County.

The clear point here is that those who stayed put in Montgomery County were typically higher earners than those who were moving into or out of the county.

**FIGURE 13: MEDIAN ADJUSTED GROSS INCOME (AGI)**

IN-movers to Montgomery County								
<i>general origin:</i>	1999	2000	2001	2002	2003	2004	2005	1999-2005 avg
Tennessee	\$19,380	\$23,087	\$22,206	\$20,767	\$19,849	\$19,387	\$20,759	\$20,776
Another U.S. State	\$21,165	\$21,183	\$22,323	\$22,101	\$22,567	\$17,294	\$23,933	\$21,509
Another Country	\$23,689	\$23,711	\$24,465	\$26,715	\$28,499	\$23,461	\$27,207	\$25,392
Non-Movers	\$26,944	\$28,069	\$28,995	\$28,889	\$28,963	\$27,457	\$30,973	\$28,613

IN-movers to Montgomery County								
<i>specific origin:</i>	1999	2000	2001	2002	2003	2004	2005	1999-2005 avg
Cheatham County, TN	\$24,999	\$22,307	\$23,499	\$21,785	\$23,749	\$20,454	\$25,681	\$23,211
Trigg County, KY	na	\$21,666	\$25,832	\$17,499	\$29,999	\$14,999	\$26,249	\$22,707
Davidson County, TN	\$20,699	\$25,356	\$22,307	\$23,029	\$19,999	\$22,726	\$23,749	\$22,552
Stewart County, TN	\$18,999	\$27,291	\$24,687	\$22,916	\$21,562	\$19,832	\$20,892	\$22,311
Houston County, TN	\$14,443	\$27,777	\$23,749	\$19,374	\$19,582	\$26,666	\$23,332	\$22,132
Robertson County, TN	\$20,768	\$22,166	\$19,749	\$21,874	\$19,705	\$24,264	\$20,312	\$21,263
Dickson County, TN	\$21,562	\$19,999	\$25,499	\$20,624	\$18,863	\$18,268	\$21,249	\$20,866
Todd County, KY	\$22,142	\$21,874	\$23,653	\$17,499	\$18,213	\$18,749	\$19,642	\$20,253
Christian County, KY	\$19,571	\$19,397	\$19,263	\$19,991	\$20,326	\$10,716	\$21,106	\$18,624

Out-Movers from Montgomery County								
<i>general destination:</i>	1999	2000	2001	2002	2003	2004	2005	1999-2005 avg
Tennessee	\$21,782	\$22,079	\$24,177	\$22,711	\$22,583	\$23,102	\$23,816	\$22,893
Another U.S. State	\$22,311	\$23,402	\$23,804	\$24,476	\$24,070	\$16,051	\$25,688	\$22,829
Another Country	\$25,956	\$25,099	\$26,437	\$26,978	\$27,673	\$24,099	\$29,661	\$26,558
Non-Movers	\$26,944	\$28,069	\$28,995	\$28,889	\$28,963	\$27,457	\$30,973	\$28,613

Out-Movers from Montgomery County								
<i>specific destination:</i>	1999	2000	2001	2002	2003	2004	2005	1999-2005 avg
Cheatham County, TN	\$22,249	\$26,874	\$32,812	\$24,090	\$24,999	\$27,499	\$30,937	\$27,066
Trigg County, KY	\$23,570	\$26,249	\$25,832	\$23,124	\$27,499	na	\$17,499	\$23,962
Davidson County, TN	\$21,817	\$23,234	\$24,999	\$22,907	\$22,812	\$24,374	\$25,048	\$23,599
Stewart County, TN	\$27,082	\$22,691	\$24,117	\$24,249	\$24,999	\$24,285	\$23,653	\$24,439
Houston County, TN	\$24,499	\$19,999	\$24,285	\$19,999	\$18,332	\$17,499	\$21,249	\$20,837
Robertson County, TN	\$21,249	\$20,416	\$23,234	\$22,916	\$22,749	\$25,892	\$25,249	\$23,101
Dickson County, TN	\$17,187	\$21,070	\$25,713	\$25,555	\$17,916	\$14,999	\$22,856	\$20,757
Todd County, KY	\$18,749	\$14,544	\$18,928	\$23,749	\$20,499	\$14,999	\$19,062	\$18,647
Christian County, KY	\$19,981	\$20,481	\$21,273	\$21,595	\$22,612	\$8,893	\$21,695	\$19,504

SOURCE: U.S. Internal Revenue Service; TIP Strategies calculations

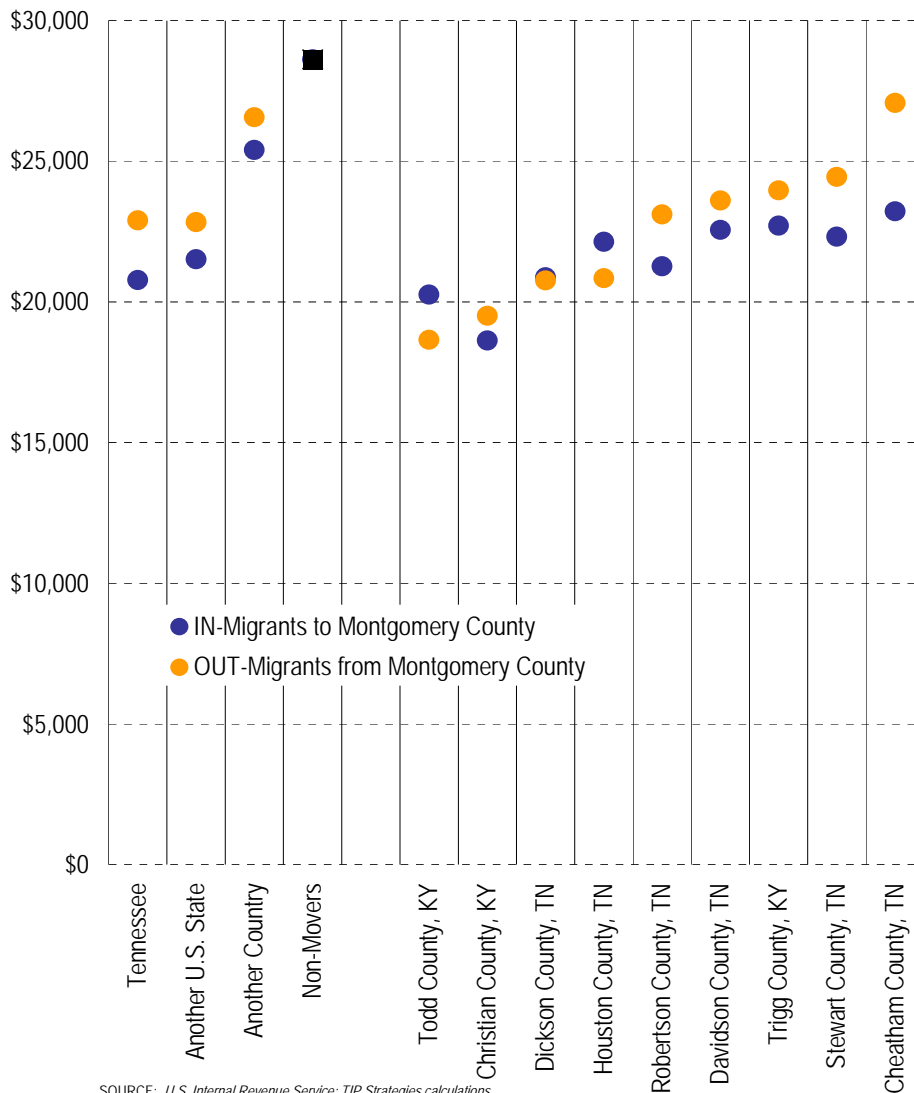
\*based on changes in the number of exemptions claimed and the place of residence claimed from one year to the next

The chart below shows the same IRS income data from the previous tables, but this time it is displayed graphically. The AGI levels shown here are 1999-2005 averages for each location. Again, it is clear that non-movers typically have higher incomes than those who are moving into or out of Montgomery County.

The biggest income gap between those moving in and out is with Cheatham County. Those leaving Montgomery to live in Cheatham earn considerably more than those leaving Cheatham to live in Montgomery.

Within the 8-county region, there are only two counties in which those moving into Montgomery earn more than those leaving. These two counties are Todd (KY) and Houston (TN). In the other six counties, the net effect of the past seven years has been that Montgomery is swapping higher income residents for lower income residents.

**FIGURE 14: MEDIAN AGI\* OF IN- AND OUT-MIGRANTS TO MONTGOMERY COUNTY**

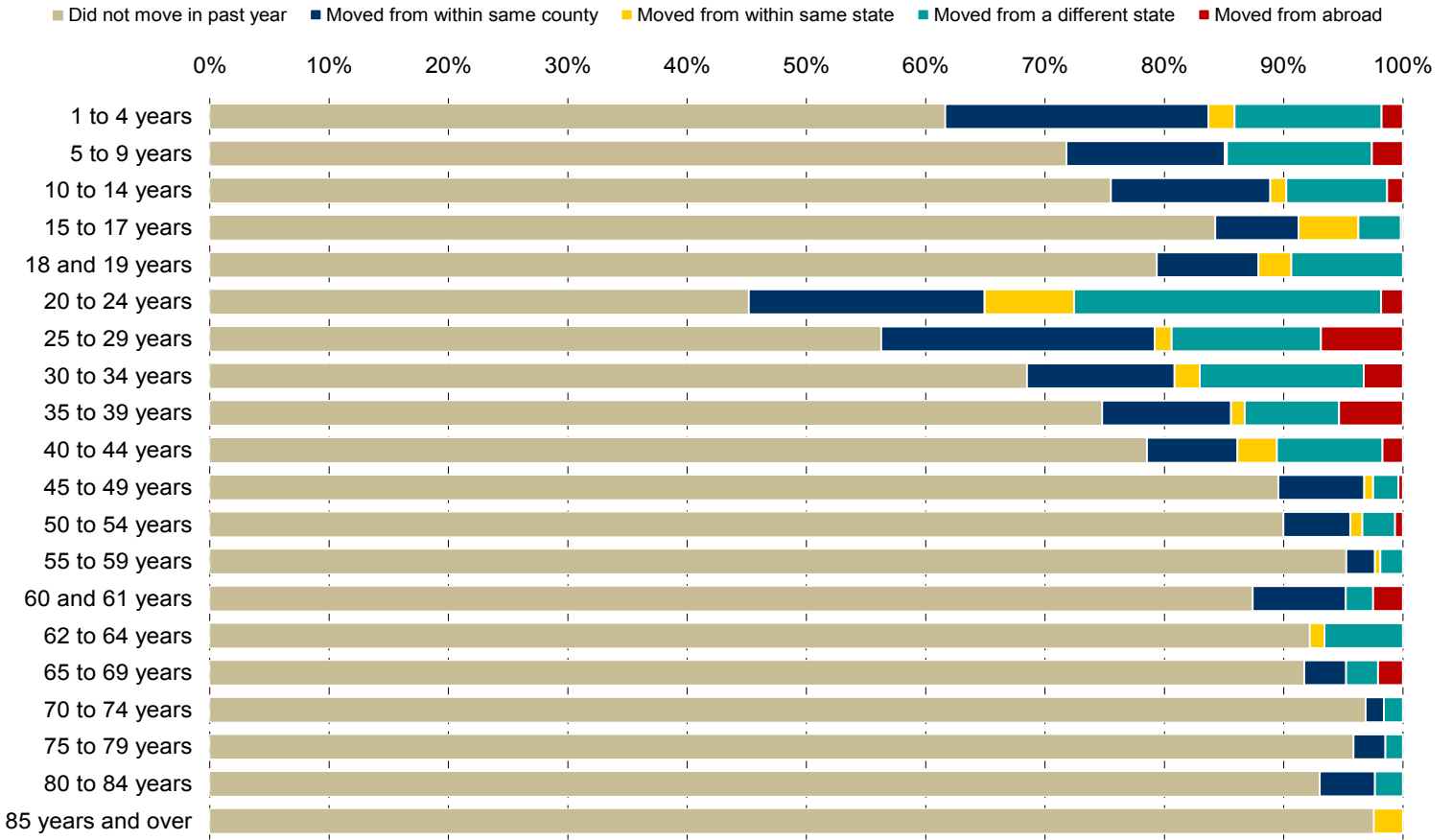


SOURCE: U.S. Internal Revenue Service; TIP Strategies calculations

\*average median adjusted gross income (AGI) for 1999-2005

A major national pattern is that those in their 20s and early 30s have more residential mobility than older adults, but this trend is especially underscored in the Clarksville MSA because of the presence of Fort Campbell. More than half of those in the MSA between the ages of 20 and 24 have moved in the past year. The movement rates for children are also high because those young adults in their 20s and 30s who are moving are in their prime years for starting and raising families.

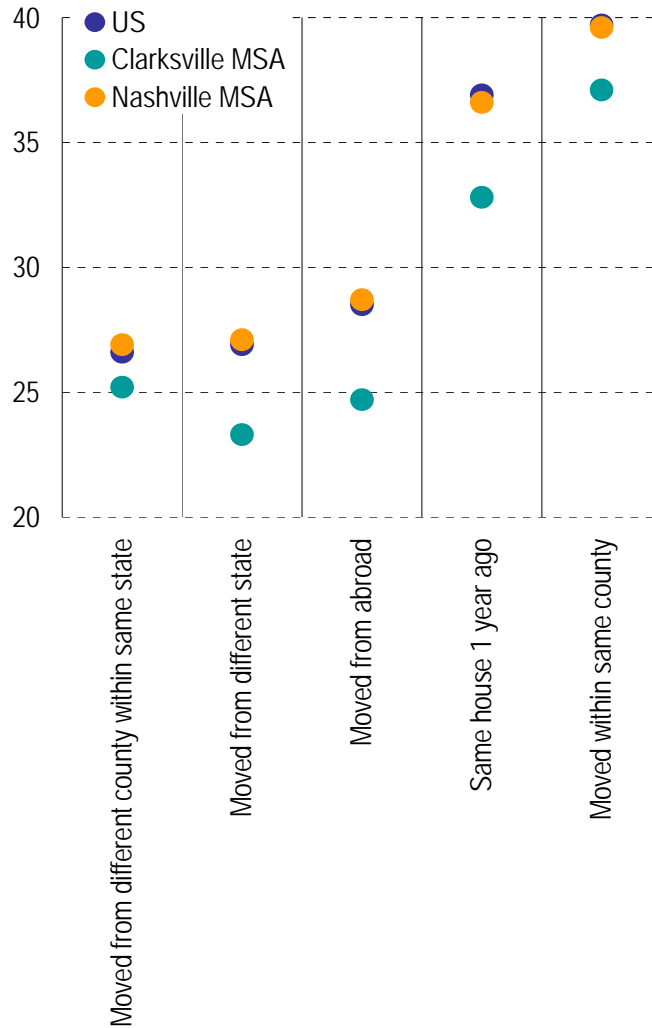
**FIGURE 15: AGE PROFILE OF CLARKSVILLE MSA RESIDENTS WHO MOVED IN THE PAST YEAR**



SOURCE: U.S. Census Bureau, 2005 American Community Survey

The median ages of movers (by type of move) in the Nashville MSA are typically similar to the national average. In the Clarksville MSA, movers of all types are younger the average, and in some cases the age gap is significant.

**FIGURE 16: MEDIAN AGE OF MOVERS**

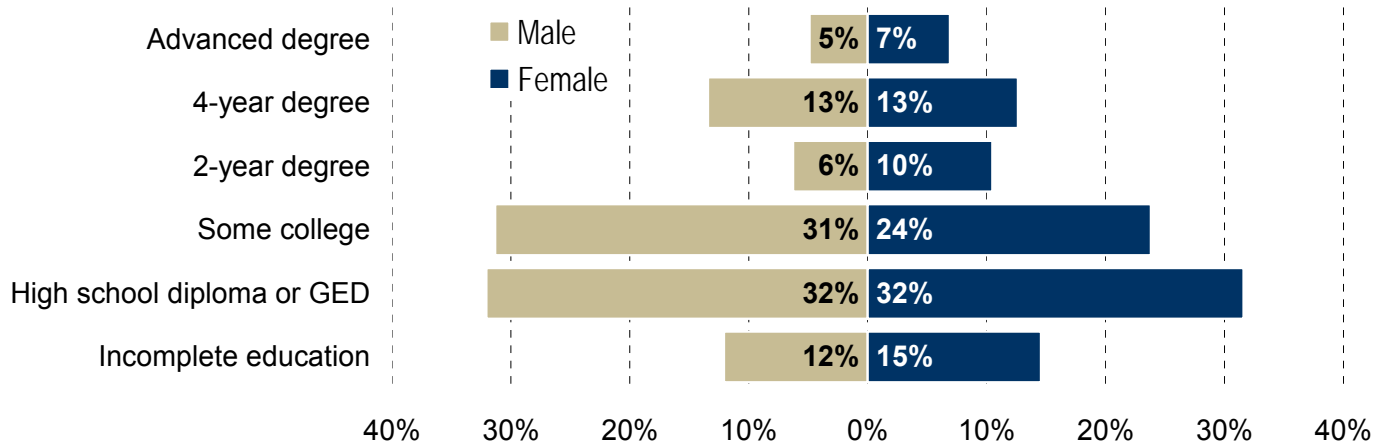


SOURCE: U.S. Census Bureau, 2005 American Community Survey

## WHAT ARE THE MAJOR ECONOMIC & DEMOGRAPHIC CHARACTERISTICS OF THE LABOR FORCE?

Educational attainment is directly correlated with income level and occupational employment; the higher the educational attainment level, the more likely an individual is to obtain a job in a high-paying occupation. Men and women in the Clarksville MSA are equally likely to have four-year degrees or high school diplomas as their highest levels of educational attainment, but the similarities stop there. For those over age 25 in the Clarksville MSA, some subtle differences appear across the gender divide at each level of educational attainment. Men are much more likely to have attended college classes without ever obtaining a degree. On the other hand, women are more likely to have an advanced degree (i.e., a degree beyond a Bachelor's) or a 2-year Associate's degree. Women are also more likely to lack a high school diploma.

**FIGURE 17: EDUCATIONAL ATTAINMENT\* FOR CLARKSVILLE MSA BY SEX**



SOURCE: U.S. Census Bureau, 2005 American Community Survey

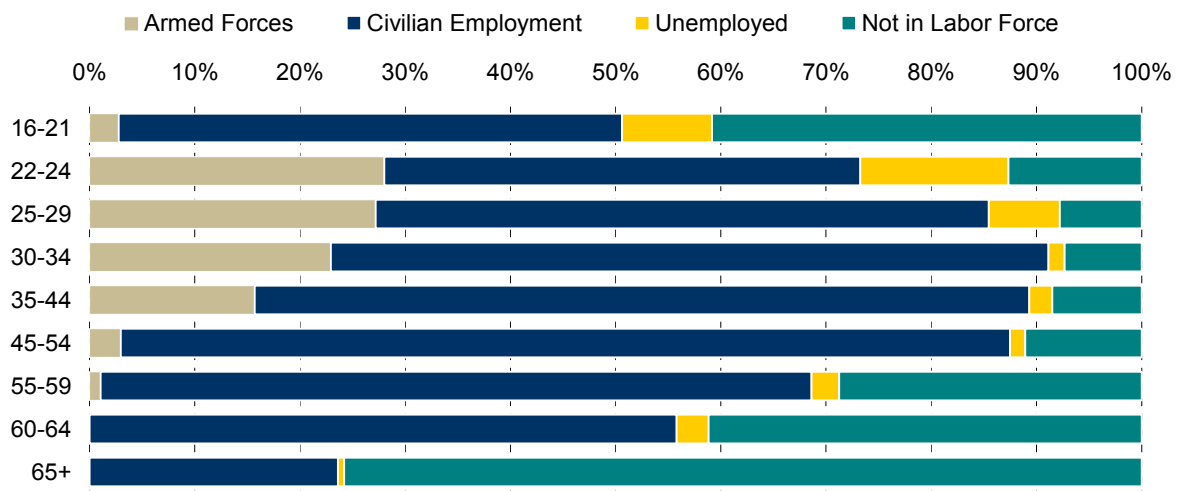
\*age 25 and over

The Census Bureau's most recent American Community Survey from 2005 reveals a vivid picture of the Clarksville MSA's labor market. Some things are obvious. For example, the Armed Forces are a major employer of young men in the Clarksville area.

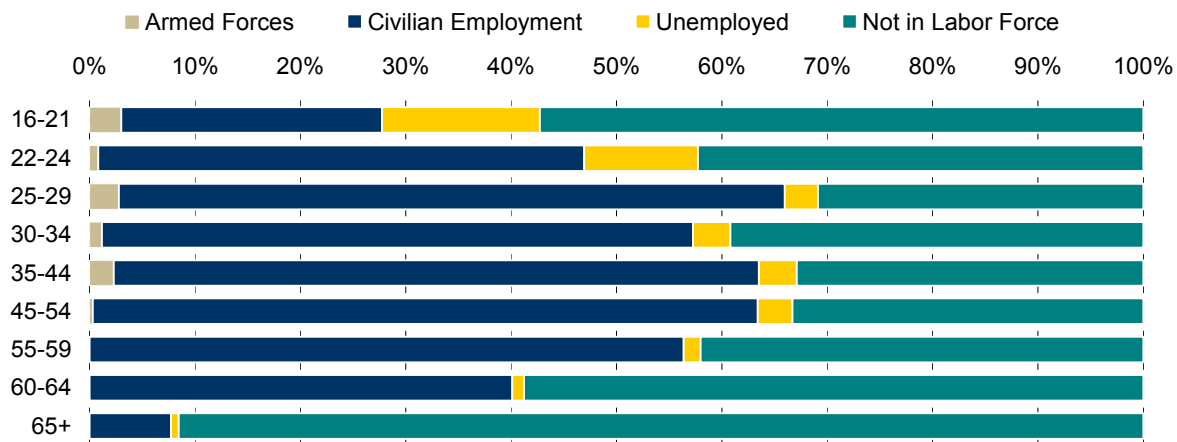
There are other things that may be less obvious. First, unemployment is much higher for younger men and women than it is for those who are older. Second, there is a large percentage of women of all ages who are not participating in the labor force. This may be by choice, but it could also be because adequate employment opportunities do not exist. Interviews and focus group meetings conducted by TIP with spouses of Fort Campbell personnel support the notion that significant numbers of females in the region do not participate in the labor force due to a lack of adequate employment opportunities.

**FIGURE 18: AGE PROFILE OF CLARKSVILLE MSA BY EMPLOYMENT STATUS**

**Men**



**Women**

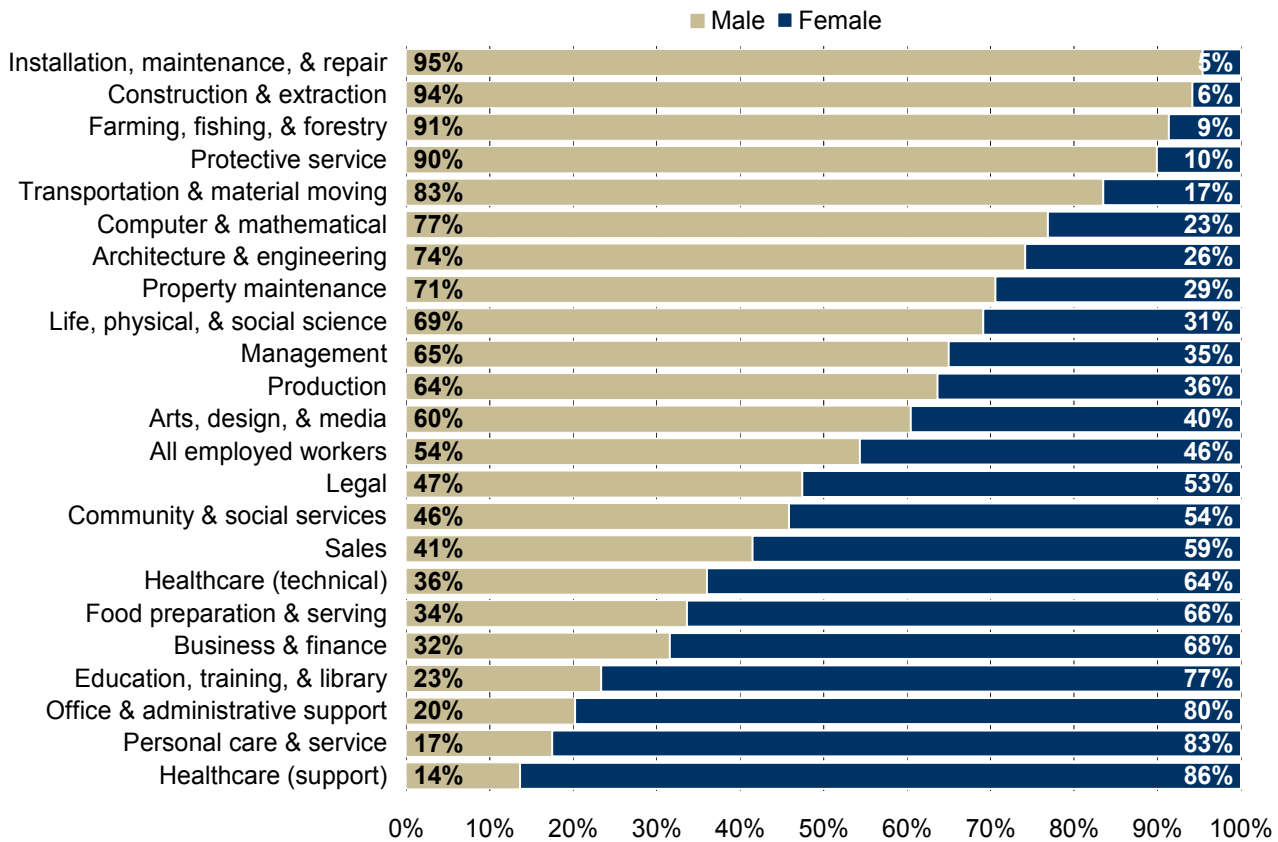


SOURCE: U.S. Census Bureau, 2005 American Community Survey

Occupational employment varies significantly by sex in the Clarksville MSA. As previously noted, Clarksville's location quotients (LQs) were high for installation, repair, and maintenance occupations, as well as production occupations. Both of these, however, are occupational groups dominated by men. In repair and maintenance, for example, 95 percent of the area's jobs are filled by men. For production occupations, the share of workers is 64 percent male.

Conversely, women in the Clarksville area are the dominant workers in occupational groups such as education, healthcare (both technical and support), sales, and business and finance.

**FIGURE 19: EMPLOYED CIVILIANS\* IN CLARKSVILLE MSA BY OCCUPATIONAL GROUP AND SEX**



SOURCE: U.S. Census Bureau, 2005 American Community Survey

\*age 16 and over

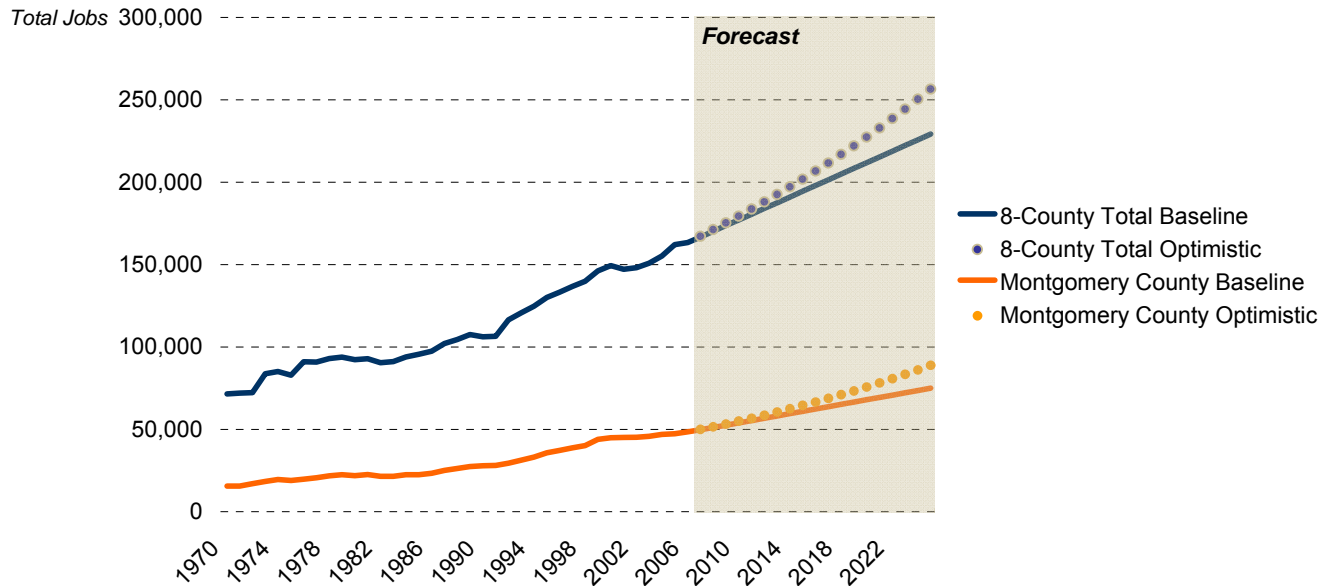
## WHAT ARE THE SCENARIOS FOR FUTURE EMPLOYMENT IN THE REGION?

TIP Strategies completed two forecast scenarios for overall job growth in the 8-county Fort Campbell region. The first scenario assumes that the average net number of jobs added annually in each county since 1990 will be projected forward into the future. This is essentially the status quo or "baseline" scenario, as shown by the solid line(s) in the shaded area. Its primary assumption is that Fort Campbell will remain a stable employer in the region and will not be negatively impacted by future BRAC decisions. Total employment is shown for the 8-county region as well as for Montgomery County alone.

The second scenario assumes that the six Tennessee counties will grow at a slightly faster pace than in the baseline. We averaged the annual recent growth rates for these counties and projected them forward. The assumptions underlying this scenario are (1) that growth from the booming Nashville area will continue to spill into the suburban and exurban counties to the north and (2) that the Clarksville-Montgomery County EDC will be engaged in an aggressive and successful job-growth strategy.

We did not prepare a pessimistic scenario, but it is worth noting that there are a number of things that could dampen prospects for the 8-county region, including downsizing at Fort Campbell, slower growth in Nashville, or loss of major private-sector employers in the region.

**FIGURE 20: JOB FORECAST SCENARIOS FOR THE 8-COUNTY REGION**

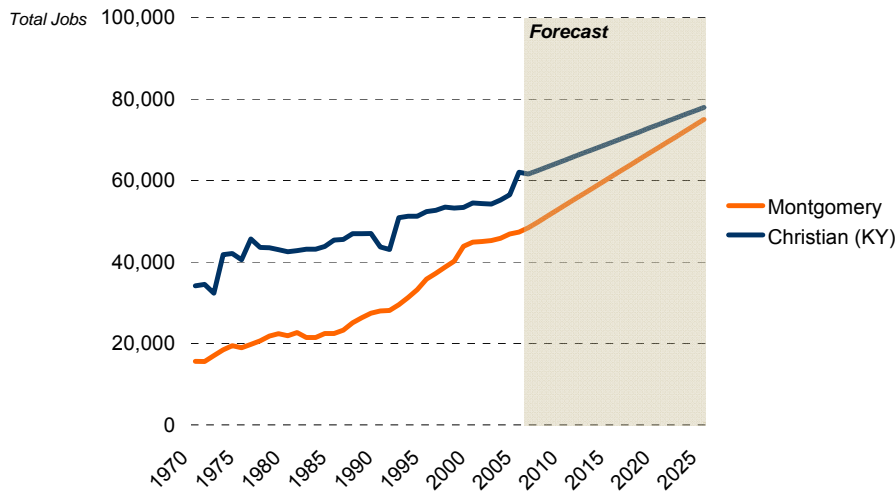


SOURCE: U.S. Bureau of Economic Analysis; U.S. Census Bureau (QCEW); TIP Strategies

Three graphs below provide more detail from the two scenario forecasts and highlight the changing relationship of Christian and Montgomery Counties. In the baseline forecast, Montgomery County's employment growth will proceed at a faster clip than Christian County's, just as it has in recent years. Montgomery County would add about 1,400 jobs annually (on average) while Christian County would average fewer than 900 new jobs a year. The effects of this differential growth would gradually accumulate and, by 2025, Montgomery would be home to almost as many jobs as Christian County.

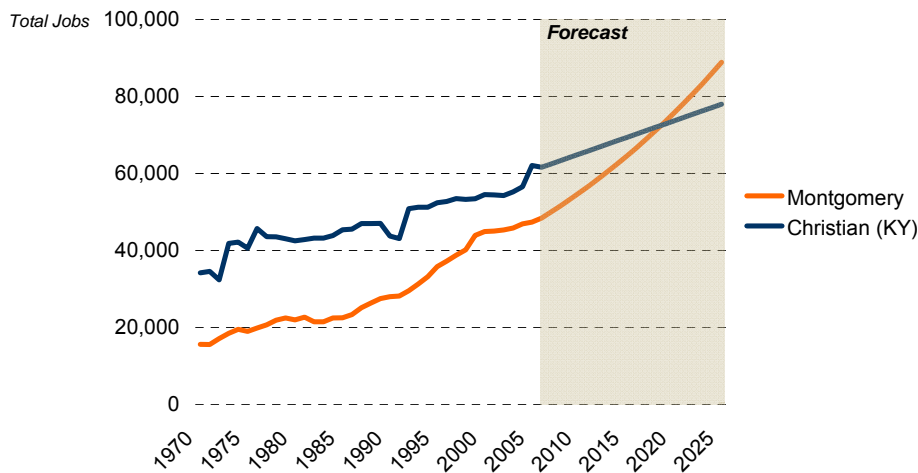
In the baseline forecast, Montgomery County's annual job growth would range from 1.9 percent to 2.8 percent, but in the more optimistic scenario, job growth for the county would average about 3.3 percent annually through 2025. If this rate were sustained, it would boost total jobs in Montgomery County above Christian County before 2020. This is significant since most of Fort Campbell's base employment is counted in Christian County.

**FIGURE 21: BASELINE SCENARIOS FOR MONTGOMERY & CHRISTIAN COUNTIES**



SOURCE: U.S. Bureau of Economic Analysis; U.S. Census Bureau (QCEW); TIP Strategies

**FIGURE 22: OPTIMISTIC SCENARIOS FOR MONTGOMERY & CHRISTIAN COUNTIES**



SOURCE: U.S. Bureau of Economic Analysis; U.S. Census Bureau (QCEW); TIP Strategies

## WHAT ISSUES DID THE FIELD INTERVIEWS REVEAL?

### UNDEREMPLOYMENT

Traditional U.S. Bureau of Labor Statistics (BLS) employment measures only separate the population into two categories: those participating in the labor force and those who are not. BLS monitors employment measures and other civilian labor statistics through the Current Population Survey (CPS), which is a monthly sample survey of 50,000 households. Unfortunately, BLS claims it cannot develop an objective set of underemployment criteria which could be readily used in a monthly household survey; therefore, no official government statistics are available on the total number of persons who might be viewed as underemployed. One definition of underemployment, which is based on a BLS measure of labor underutilization, is defined as unemployed workers plus three other categories of people:

- Those working part-time but who want to work full time ("involuntary part-time workers").
- Those who want to work but have been discouraged from searching by their lack of success ("discouraged workers").
- Others who are neither working nor seeking work at the moment but who indicate that they want and are available to work and have looked for a job in the last 12 months.

However, due to the statistical limitation of the CPS, it is not realistic to reliably measure underemployment at the local level. Another commonly attempted method for measuring underemployment is to conduct a local household phone survey. However, TIP did not perform a household phone survey for this study – primarily because we do not view the resulting data as reliable.

We are, therefore, left with assessing underemployment in the Fort Campbell region anecdotally through direct interviews with area residents. The only group of people who consistently reported significant issues of underemployment are military spouses. Research and literature on national military family employment issues indicate spouses of active duty service members generally encounter significant barriers to finding desirable work. This assertion is supported by the views of spouses interviewed as part of this study at Fort Campbell. Some of the opinions expressed to the consulting team by the spouses include:

- Many spouses must travel to Nashville in order to find work that matches their education and skill level and to earn higher pay.
- Some felt the need to conceal advanced degrees on their resumes and in interviews because it may put them at a competitive disadvantage in landing a job. They contend employers would rather hire someone with less education because they will feel less threatened personally.
- Some employers in the Fort Campbell region prefer not to hire military spouses because of a perceived high turnover and low retention rates.
- Finding adequate and affordable childcare in the region is a barrier to employment. The high cost of child care combined with the low wage levels paid in the region make working financially impractical for many.

### GEOGRAPHICAL DISBURSEMENT OF WORKERS

The interviews reveal a relatively mobile workforce that is willing to commute significant distances for good jobs. This is especially true for local residents commuting to jobs in Nashville. Many reported to the consulting team that the commute to Nashville – typically around 40 minutes – is actually comparable to commuting within many congested areas of Clarksville.

And while Clarksville's proximity to Nashville can be a challenge, in that it siphons away many local workers, it can also be a major selling point for recruiting high level managers and physicians. Even lower

paid workers in Clarksville can access the cultural, entertainment, retail, and dining options found in Nashville, and still enjoy the lower cost of living surrounding Fort Campbell.

### **LABOR ISSUES OR PROBLEMS OF MAJOR EMPLOYERS**

Most Fort Campbell area employers report general satisfaction with the region's labor force. The few issues they did report include:

- For manufacturers, finding people to fill entry-level production is not generally a challenge; although, retaining the best workers of this group can be difficult. The biggest workforce problem for the area's manufacturers seems to be locating more technically-skilled workers, especially higher-level mechanical and maintenance techs. One company is having to resort to utilizing a national head-hunting firm for these positions, and has recently hired someone from as far away as Vermont.
- There is a general lack of interest in pursuing a manufacturing career among younger workers in the region. They associate a negative stigma with being a production worker.
- Major healthcare employers report difficulty in recruiting some highly skilled workers, especially RNs, CT techs, ultra sound techs, pharmacists, speech pathologists, and rehabilitation therapists.

## RECOMMENDATIONS

### 1. INITIATE AND MAINTAIN A FORT CAMPBELL VETERANS AND SPOUSES INVENTORY SYSTEM.

One of the region's greatest economic development assets is the pool of skilled, disciplined, and motivated workers associated with Fort Campbell. This workforce consists of Army retirees living in the region as well as current soldiers separating from service through Fort Campbell. This pool of existing and potential labor is further enhanced by the spouses of active duty personnel and veterans, who themselves are often highly skilled and educated. Unfortunately, many military families do not remain in the Clarksville area after their service ends due to a lack of adequate employment opportunities that fully utilize their skills and abilities.

In order better understand and document the unique characteristics of the region's military related workforce, area economic and workforce development organizations should regularly inventory the intentions, educational levels, skills, and desired employment of soldiers separating from the military at Fort Campbell, as well as the spouses of soldiers stationed at Fort Campbell. The primary objective of the Fort Campbell inventory is to capture critical information about this population that can be used to recruit companies considering new locations for relocation or expansion, thus providing enhanced employment opportunities for residents in the Fort Campbell region. The inventory will additionally capture insightful information regarding the skills and desired career fields of military spouses that will further enhance talent retention and business recruitment to the region. Finally, the survey will gather valuable feedback on issues related to quality of life (Place) in the region – information which is critical to successfully retaining the best and the brightest in the community.

**Veterans possess many characteristics that companies highly desire:**

- Demonstrated leadership and managerial skills
- Training to industry standards
- The ability to adapt quickly to change
- Knowledge of advanced technologies
- Experience working effectively under extreme pressure
- Education and professional certification credentials
- Strong work ethic
- Experience working within and/or leading diverse teams
- Effective written and verbal communications skills
- Security clearances
- History of accepting and following orders from superiors

**STEP 1: Obtain the commitment from area organizations to participate in the Fort Campbell inventory initiative.**

A memorandum of understanding (MOU) should be drafted and signed by the Clarksville Montgomery County Economic Development Council (CMCEDC), Workforce Essentials, Inc., and the Transition & Employment Assistance Management (TEAM) Division at Fort Campbell that defines the roles and responsibilities that each organization should assume in the inventory initiative. Each organization has a specific role to play in order to ensure its success and effectiveness. Other organizations, such as a local veterans organization, can be included in the consortium.

Recommended roles for each organization include:

- CMCEDC staff should tabulate survey results, perform appropriate analysis of the survey results, design data charts/graphs as needed to effectively describe the data, and maintain the survey database. The CMCEDC should also utilize the data and analysis in effective marketing campaigns and business recruitment activities. It should also provide regular suggestions regarding changes to the survey instrument and process for collecting the data.
- The TEAM Division should provide the staff and technical support needed to administer the surveys. TEAM Division should also regularly assess the effectiveness of the survey process and questionnaire based on feedback from respondents and their own experiences.
- Workforce Essentials, Inc. should contribute its expertise to the analysis of the survey results, as well as needed administrative support for tabulating the results.

**Why hire military family members?**

- They adapt readily to new environments. Because of the recurrent changes in their lifestyles, military spouses have learned to invest their energies quickly in their new communities.
- As members of the Department of Defense family, they know what commitment means.
- They have proven knowledge, skills, and abilities to make a contribution to an organization.
- Their variety of life and work experiences enables them to quickly determine the most efficient way to perform many tasks.
- The special training mission at Fort Campbell tends to keep military families in the local area for years longer than at most installations.
- Many develop careers in the community and become permanent area residents.
- Many will accept temporary work.

***STEP 2: Administer a questionnaire to Fort Campbell personnel attending the Transition Assistance Program (TAP) classes.***

The TAP, which is jointly sponsored by the Departments of Defense, Veterans Affairs, Transportation, and Labor, is designed to assist separating service members who are transitioning into civilian life. TAP provides employment and training information and assistance to service members and spouses within 180 days of separation or retirement. The program consists of 2<sup>1/2</sup>-day workshops, where attendees learn about such subjects as searching for jobs, current labor market conditions, resume and cover letter preparation, and interviewing techniques.

At Fort Campbell, TAP classes are held weekly and facilitated by Army Career Alumni Program (ACAP) staff members. Four classes a month are held for transitioning junior enlisted personnel, and one class is held for retirees. The TAP workshops are ideal venues for administering the survey because there are a manageable number of potential respondents – typically below 50 – who have an interest in responding to the questions and who will be leaving the military within six months. Test surveys have already been administered to two TAP workshops, and the response rates have been high. The following section contains the draft survey questionnaire and the initial results of the inventory.

In order to avoid interfering with existing equipment or staffing agreements, for at least the first year, the survey should be administered via an anonymous one-page paper questionnaire. During this period, the value of the information learned from surveys and the benefit to the service members themselves can be demonstrated to all interested parties, including the Army Career Alumni Program (ACAP) and the U.S. Army. After one year has elapsed, a process using a computer-based electronic survey should be considered.

***STEP 3: Provide a questionnaire to military spouses who utilize the services provided by the Family Readiness Employment Program (FERP).***

FERP provides a host of employment services to family members of active duty military, Department of Defense civilians, and retirees. FERP services include teaching specialized workshops that cover writing resumes and cover letters, filling out job applications, and interviewing. FERP staff also offer free specialized job counseling, job search skills training, outside agency referrals, and local job leads.

According to FERP representatives, every month approximately 100 Fort Campbell spouses visit their office for the first time seeking assistance. This high traffic count presents an excellent opportunity for the community to gather valuable information and data on an underutilized pool of labor. For this study, 80 FERP clients were willing to fill out a one-page questionnaire that inquired about such issues as current employment status, skill and education level, career aspirations, future location plans, and views on quality of life in the region surrounding Fort Campbell. Over time, surveys completed by spouses utilizing FERP service can provide a tremendous data resource for community economic development professionals seeking to demonstrate the presence of an available workforce to potential and existing employers.

Other recommendations for launching a long-term Fort Campbell inventory system include:

- Initially, the survey results can be manually tabulated into a subscription web-based survey program such as SurveyMonkey or a more advanced purchased program such as Remark Office OMR 6. The results of the pilot surveys were manually tabulated by the consulting team into SurveyMonkey, which offers a professional subscription for \$19.95 a month for up to 1,000 survey responses, and 5¢ for each response above 1,000.

However, TIP recommends the participating organizations purchase Remark Office 6 (\$895) or a similar program. Utilization of such a program would allow for survey forms to be scanned into a database using a typical office scanner rather than having to manually enter the data. The Remark program offers scan form templates that can be modified and coded to meet the needs soldier and spouse surveys. For instance, this would allow for the soldier survey form to allow for MOS codes to be entered. The results can then either be cross-tabulated and analyzed in the Remark program or exported to a spreadsheet or relational database program.

- The raw results should be provided to the CMCEDC, the TEAM Division, and Workforce Essentials for their own analysis and use. Other participant cities in the region may also be able to utilize the data for their own planning activities.
- The CMCEDC should utilize the data in its targeted marketing and business recruitment activities.
- The parties to the MOU should periodically review the progress of the Fort Campbell inventory program and make necessary changes/modifications to either process or instrument when needed.
- At an appropriate time, a proposal should be made to the U.S. Army that it formally endorse and incorporate the inventory program into its transition assistance activities and programs on Fort Campbell. The survey might then be administered via computer within the TEAM Division offices, thus automating the inventory system and making it more efficient and user-friendly.

**2. FORM A REGIONAL NON-PROFIT ORGANIZATION TO ADVANCE THE MUTUAL INTERESTS OF FORT CAMPBELL AND DEFENSE-IMPACTED INDUSTRIES, ORGANIZATIONS, AND INSTITUTIONS IN THE SURROUNDING REGION.**

In 1997, the Clarksville and Hopkinsville Chambers of Commerce jointly launched a volunteer citizens organization dedicated to forging closer ties between communities in the region and Fort Campbell. Known as Citizens for Fort Campbell, the group’s mission has evolved to include annually visiting with federal officials to advocate for funding new capital projects on the post. Over the past 10 years, the group has helped to secure over \$120 million in appropriations to fund the construction of new buildings on Fort Campbell. This initiative has clearly served both the region and Fort Campbell well.

To enhance the efforts of the citizens group and its regional participants, a formal non-profit organization should be formed. Such an organization should be staffed by an executive director and led by a regional board of directors. The primary purpose of creating a non-profit organization is to formalize the region’s defense advocacy and education programs and provide daily attention to defense related issues, both regionally and nationally. Ideally, the organizations would be directed by a retired senior officer from Fort Campbell who resides in the region and has an interest in promoting both the needs of the post and the needs of the surrounding communities. The organization should be funded by a consortium of city, county, economic development, and private sector institutions in the region. Potential activities such an organization could lead include:

- Developing a list of defense-related needs, opportunities, and strategies in the region.
- Informing regional leaders on defense issues.
- Leading education and advocacy efforts on future rounds of BRAC.
- Serving as a liaison between Fort Campbell and neighboring communities and organizations.
- Supporting the region’s efforts to promote the mission and regional impact of Fort Campbell in Nashville and Washington.

- Leading other planning efforts dealing with post-related growth.

A potential model for Fort Campbell regional defense organization is the Heart of Texas Defense Alliance (HOTDA), a non-profit organization that represents a three-county region surrounding Fort Hood on defense related issues. HOTDA is chaired by a former commanding general and directed by former garrison commander of Fort Hood.

**3. EMBRACE A REGIONAL APPROACH TO ECONOMIC AND TALENT DEVELOPMENT INITIATIVES.**

In the global and highly competitive nature of today's economy, it is increasingly important for communities to embrace a regional approach to economic development. It is no longer cost-effective to conduct economic development one water tower at a time, especially in more rural areas. Labor is too mobile and new industrial prospects are too few. Therefore, regional economic development organizations should work more closely to promote the area's common attributes and assets, including those that transcend state borders.

**4. INITIATE AN EXTERNAL TALENT MARKETING CAMPAIGN THAT HIGHLIGHTS THE REGION'S UNIQUE TALENT BASE, ESPECIALLY ITS VETERANS AND MILITARY FAMILIES.**

Regional economic development organizations should initiate a formal external marketing campaign that highlights the area's talent base, particularly its highly desired military related population. The data produced from the Fort Campbell inventory initiative should support the campaign.

**5. LAUNCH PUBLIC AWARENESS CAMPAIGN WITHIN THE REGION THAT FEATURES THE QUALITIES OF MILITARY FAMILIES AND PROMOTES THEIR EMPLOYABILITY TO REGIONAL EMPLOYERS.**

One of the issues commonly raised by soldiers and their families to the consulting team is a sense of being under appreciated by area employers. They indicated that they are often made to feel that being associated with military is an obstacle to employment. Such a view or perception is not isolated to Fort Campbell; it is a complaint commonly heard in many military communities around the nation. To combat this perception locally, area communities should launch an internal (regional) public awareness campaign that highlights the highly positive employment attributes of veterans and their families.

**6. PURSUE AN OEA GRANT AWARD TO FUND FORT CAMPBELL-RELATED GROWTH PLANNING AND ECONOMIC DIVERSIFICATION STRATEGIES.**

Local governments in the region should collectively pursue a Department of Defense planning grant from the Office of Economic Adjustment (OEA). Given the recent and anticipated future growth associated with Fort Campbell, an application for an OEA Growth Management Planning Assistance grant should be considered. According to OEA, the objective of this grant program is to assist local governments in undertaking "community economic adjustment planning activities in response to the establishment or expansion of a Department of Defense (DoD) military installation. This activity is directed toward impacts resulting from the opening or expansion of a military installation, and the additional civilian public facilities and services that may be required to support the increased military presence." Information on this and other OEA defense industry adjustment programs can be found on the OEA Website: [www.oea.gov](http://www.oea.gov).

## APPENDIX 1: MOS-SOC CROSSWALK

To assess the potential impact of Fort Campbell on the regional civilian labor force, the consulting team analyzed the military occupational specialties (MOS) of current U.S. Army active duty personnel stationed at the post. The Department of Defense provided the consulting team a breakdown of over 29,000 soldiers by MOS code, along with corresponding employment levels. These MOS codes were provided to us in three separate groupings: (1) enlisted personnel; (2) officers; and (3) warrant officers. For officers and warrant officers, TIP selected the 10 occupations with the highest levels of employment at Fort Campbell. For enlisted personnel, we selected the top 25 occupations. These 45 occupations together represent the vast majority of military employment at Fort Campbell.

The U.S. Bureau of Labor Statistics (BLS) provides crosswalks of various current and past occupational code schemes. TIP cross-referenced to the current MOS codes to the latest Standard Occupational Classification (SOC) codes. The SOC codes are widely used for private-sector occupational analysis. For many of the MOS-defined occupations there were no direct translations. This was particularly true for military occupations that were combat-specific and did not have directly corresponding skills that would be useful for civilian jobs.

On the other hand, many of the military occupations were directly transferable to civilian occupations. In fact, a large number of these occupations were tagged by the BLS as “high demand” occupations that are actively sought by employers. The occupations classified by the BLS as high demand were found in all three military employment groupings: enlisted personnel, officers, and warrant officers.

TIP focused on the high-demand civilian occupations. Once these were identified, we compared each individual occupation to an industry-occupation matrix. The matrix (located on the following page) shows the industries most likely to employ each civilian occupation. We analyzed the top 10 industries for each occupation, discarding federal, state, and local government employment options, as well as industries that fell under the classification of “temp agencies”. The options that remained were mostly private-sector industries or self-employment. In the matrix, the industries are shown in columns and occupations are shown in rows. A red checkmark indicates the intersection of a high-demand occupation with a corresponding private sector industry that is likely to employ it.

FIGURE 23: ENLISTED

				Industries most likely to employ high-demand professions from Fort Campbell												
MOS	Jobs	SOC	Description	Not Directly Transferrable to Private Sector	High-demand occupation*	Aerospace & parts manufacturing	Air transportation	Ambulance services	Automobile dealers	Automotive parts, accessories, & tire stores	Automotive repair & maintenance	Cement & concrete manufacturing	Child care facilities	Couriers	Food & accommodation services	
11B	4,924	55-2012.00	First-Line Supervisors/Managers of Weapons Specialists/Crew Members	*												
		55-3016.00	Infantry	*												
88M	1,318	53-3032.00	Truck Drivers, Heavy and Tractor-Trailer		✓							✓				
		53-3033.00	Truck Drivers, Light or Delivery Services		✓					✓				✓		
		53-3099.99	Motor Vehicle Operators													
63B	1,137	49-3023.01	Automotive Master Mechanics		✓				✓	✓	✓					
		49-3023.02	Automotive Specialty Technicians		✓				✓	✓	✓					
68W	1,109	29-2041.00	Emergency Medical Technicians and Paramedics		✓			✓								
92A	832	43-5071.00	Shipping, Receiving, and Traffic Clerks		✓											
		43-5081.03	Stock Clerks- Stockroom, Warehouse, or Storage Yard													
		43-5081.04	Order Fillers, Wholesale and Retail Sales													
		53-7062.00	Laborers and Freight, Stock, and Material Movers, Hand		✓									✓		
92F	821	51-8093.00	Petroleum Pump System Operators, Refinery Operators, and Gaugers													
92Y	718	43-5071.00	Shipping, Receiving, and Traffic Clerks		✓											
		43-5081.03	Stock Clerks- Stockroom, Warehouse, or Storage Yard													
		43-5081.04	Order Fillers, Wholesale and Retail Sales													
31B	665	33-3051.01	Police Patrol Officers		✓											
		33-9032.00	Security Guards		✓											✓
13B	643	55-3014.00	Artillery and Missile Crew Members	*												
92G	640	35-2012.00	Cooks, Institution and Cafeteria		✓								✓		✓	
		35-2021.00	Food Preparation Workers		✓										✓	
19D	586	55-3013.00	Armored Assault Vehicle Crew Members	*												
15T	564	49-3011.00	Aircraft Mechanics and Service Technicians		✓	✓	✓							✓		
13F	549	55-3014.00	Artillery and Missile Crew Members	*												
42A	514	13-1079.99	Human Resources, Training, and Labor Relations Specialists, All Other													
		43-4161.00	Human Resources Assistants, Except Payroll and Timekeeping													
11C	507	55-3016.00	Infantry	*												
25U	486	27-4013.00	Radio Operators													
		49-2021.00	Radio Mechanics													
		49-9052.00	Telecommunications Line Installers and Repairers													
15U	478	49-3011.00	Aircraft Mechanics and Service Technicians		✓	✓	✓							✓		
21B	431	47-4099.99	Construction and Related Workers, All Other													
74D	407	55-3019.99	Military Enlisted Tactical Operations and Air/Weapons Specialists and Crew Members, All Other	*												
96B	321	55-3019.99	Military Enlisted Tactical Operations and Air/Weapons Specialists and Crew Members, All Other	*												
15P	311	53-2022.00	Airfield Operations Specialists													
15R	265	49-3011.00	Aircraft Mechanics and Service Technicians		✓	✓	✓							✓		
92W	257	51-8031.00	Water and Liquid Waste Treatment Plant and System Operators													
25B	251	43-9011.00	Computer Operators													
15S	219	49-3011.00	Aircraft Mechanics and Service Technicians		✓	✓	✓							✓		

FIGURE 24: ENLISTED, cont.

				Industries most likely to employ high-demand professions from Fort Campbell													
MOS	Jobs	SOC	Description	Not Directly Transferrable to Private Sector	High-demand occupation*	Freight trucking	Gasoline stations	Hospitals	Industrial machinery, equipment, & supply mfg	Medical offices	Private security services	Property managers	Retail	Self-employment	ENLISTED, CON'T	Warehousing, g, & s	Waste collection
11B	4,924	55-2012.00	First-Line Supervisors/Managers of Weapons Specialists/Crew Members	*													
		55-3016.00	Infantry	*													
88M	1,318	53-3032.00	Truck Drivers, Heavy and Tractor-Trailer		✓	✓								✓	✓	✓	✓
		53-3033.00	Truck Drivers, Light or Delivery Services		✓	✓							✓	✓	✓	✓	
		53-3099.99	Motor Vehicle Operators														
63B	1,137	49-3023.01	Automotive Master Mechanics		✓		✓							✓			
		49-3023.02	Automotive Specialty Technicians		✓		✓							✓			
68W	1,109	29-2041.00	Emergency Medical Technicians and Paramedics		✓			✓		✓							
92A	832	43-5071.00	Shipping, Receiving, and Traffic Clerks		✓				✓				✓			✓	
		43-5081.03	Stock Clerks- Stockroom, Warehouse, or Storage Yard														
		43-5081.04	Order Fillers, Wholesale and Retail Sales														
		53-7062.00	Laborers and Freight, Stock, and Material Movers, Hand		✓	✓							✓			✓	
92F	821	51-8093.00	Petroleum Pump System Operators, Refinery Operators, and Gaugers														
92Y	718	43-5071.00	Shipping, Receiving, and Traffic Clerks		✓				✓				✓			✓	
		43-5081.03	Stock Clerks- Stockroom, Warehouse, or Storage Yard														
		43-5081.04	Order Fillers, Wholesale and Retail Sales														
31B	665	33-3051.01	Police Patrol Officers		✓												
		33-9032.00	Security Guards		✓			✓			✓	✓	✓				
13B	643	55-3014.00	Artillery and Missile Crew Members	*													
92G	640	35-2012.00	Cooks, Institution and Cafeteria		✓			✓							✓		
		35-2021.00	Food Preparation Workers		✓			✓					✓	✓			
19D	586	55-3013.00	Armored Assault Vehicle Crew Members	*													
15T	564	49-3011.00	Aircraft Mechanics and Service Technicians		✓				✓					✓			
13F	549	55-3014.00	Artillery and Missile Crew Members	*													
42A	514	13-1079.99	Human Resources, Training, and Labor Relations Specialists, All Other														
		43-4161.00	Human Resources Assistants, Except Payroll and Timekeeping														
11C	507	55-3016.00	Infantry	*													
25U	486	27-4013.00	Radio Operators														
		49-2021.00	Radio Mechanics														
		49-9052.00	Telecommunications Line Installers and Repairers														
15U	478	49-3011.00	Aircraft Mechanics and Service Technicians		✓				✓					✓			
21B	431	47-4099.99	Construction and Related Workers, All Other														
74D	407	55-3019.99	Military Enlisted Tactical Operations and Air/Weapons Specialists and Crew Members, All Other	*													
96B	321	55-3019.99	Military Enlisted Tactical Operations and Air/Weapons Specialists and Crew Members, All Other	*													
15P	311	53-2022.00	Airfield Operations Specialists														
15R	265	49-3011.00	Aircraft Mechanics and Service Technicians		✓				✓					✓			
92W	257	51-8031.00	Water and Liquid Waste Treatment Plant and System Operators														
25B	251	43-9011.00	Computer Operators														
15S	219	49-3011.00	Aircraft Mechanics and Service Technicians		✓				✓					✓			

**Industries most likely to employ high-demand professions from Fort Campbell**

**FIGURE 25: OFFICERS**

MOS	Jobs	SOC	Description	Not Directly Transferrable to Private Sector	High-demand occupation*	Agricultural & forestry services	Air transportation	Ambulance services	Computer systems design services	Corporate HQs	Couriers	Data processing & hosting services	Financial services	Freight trucking	Home health care services	Hospitals	Medical offices	Self-employment	Senior care facilities	Software publishers	Technical & Trade Schools	Warehousing, storage, wholesaling, & logistics	
11A	366	55-1016.00	Infantry Officers	*																			
15A	276	53-2011.00	Airline Pilots, Copilots, and Flight Engineers		✓	✓	✓			✓	✓							✓					
		53-2012.00	Commercial Pilots		✓	✓	✓	✓		✓								✓			✓		
13A	187	55-1014.00	Artillery and Missile Officers	*																			
35D	125	55-1015.00	Command and Control Center Officers	*																			
25A	115	11-3021.00	Computer and Information Systems Managers		✓				✓	✓		✓	✓								✓		
88A	108	11-3071.01	Transportation Managers		✓					✓	✓			✓				✓					✓
18A	104	55-1017.00	Special Forces Officers	*																			
92A	104	11-3071.02	Storage and Distribution Managers		✓					✓	✓			✓				✓					✓
91A	99	13-1081.00	Logisticians																				
67A	98	11-9111.00	Medical and Health Services Managers		✓										✓	✓	✓	✓	✓				

**Industries most likely to employ high-demand professions from Fort Campbell**

**FIGURE 26: WARRANT OFFICERS**

MOS	Jobs	SOC	Description	Not Directly Transferrable to Private Sector	High-demand occupation*	Agricultural & forestry services	Air transportation	Ambulance services	Automobile dealers	Automotive parts, accessories, & tire stores	Automotive repair & maintenance	Corporate HQs	Self-employment	Technical & Trade Schools	Utilities (electric)	Utilities (telecom)
153D	333	53-2012.00	Commercial Pilots		✓	✓	✓	✓				✓	✓	✓		
152D	179	53-2012.00	Commercial Pilots		✓	✓	✓	✓				✓	✓	✓		
152H	118	53-2012.00	Commercial Pilots		✓	✓	✓	✓				✓	✓	✓		
154C	73	53-2012.00	Commercial Pilots		✓	✓	✓	✓				✓	✓	✓		
154E	59	53-2012.00	Commercial Pilots		✓	✓	✓	✓				✓	✓	✓		
153E	52	53-2012.00	Commercial Pilots		✓	✓	✓	✓				✓	✓	✓		
003A	48	n/a	Student													
180A	44	55-1017.00	Special Forces Officers	*												
915A	34	49-1011.00	First-Line Supervisors/Managers of Mechanics, Installers, and Repairers		✓				✓	✓	✓				✓	✓
151A	29	49-1011.00	First-Line Supervisors/Managers of Mechanics, Installers, and Repairers		✓				✓	✓	✓				✓	✓

