

Workforce Estimating Conference

Caldwell Building Room B-049

August 28, 2008

2:00–4:00 pm

Call-in Number 1-888-808-6959

Pass Code 6724792 #

Agenda

- Welcome and Opening Remarks Kurt Hamon, Senate

- Florida Labor Market Update Rebecca Rust, AWI LMS

- Employment Projections 2016 Bill Dobson, AWI LMS

- Wage Thresholds/ECI Criteria Bill Dobson, AWI LMS

- Statewide Occupational Demand List
(Action Item) Bill Dobson, AWI LMS
Kurt Hamon, Senate

- Board of Governors' Strategic Plan
Targeted Degree Programs Richard Stevens, BOG

- Other Items Kurt Hamon, Senate

- Closing Remarks Kurt Hamon, Senate

Principals of the Workforce Estimating Conference:

Conference Chair:

Kurt Hamon, Florida Senate Education Appropriations Committees

Mark Eggers, Florida House, Schools and Learning Council

Amy Baker, Economic and Demographic Research

Lisa Saliba, Executive Office of the Governor

Workforce Estimating Conference August 28, 2008

ACTION MINUTES

Principals attending:

Amy Baker, Legislative Office of Economic & Demographic Research
Kurt Hamon, Florida Senate (Chair)
Mark Eggers, Florida House of Representatives
Lisa Saliba, Office of the Governor

Presenters:

Rebecca Rust, Agency for Workforce Innovation (AWI), Labor Market Statistics (LMS)
Bill Dobson, AWI, LMS
Richard Stevens, Florida Board of Governors (BOG)

Presentations:

Rebecca Rust (AWI/LMS) presented a Florida labor market and economic update. See handouts for details. Bill Dobson (AWI/LMS) presented the employment projections for 2016 and the proposed wage thresholds and Employment Cost Index criteria. He also submitted the Statewide Occupational Demand List for the principals' consideration. See handouts for details. Richard Stevens (BOG) presented information on the Board of Governors' staff proposals for Areas of Programmatic Strategic Emphasis.

Discussion:

Conferees requested that AWI generate a "short-term supply indicator" for those occupations expected to have sufficient supply of trained job-seekers in the short term, such as many construction-related occupations. Principals noted that, for occupations associated with the housing bubble, total jobs may not reach the levels seen in 2006 during the forecast period to 2016.

Actions:

The Workforce Estimating Conference met August 28, 2008 to consider criteria for the 2009-10 Statewide Demand Occupation List and the High Skilled / High Wage subset of that list and to adopt a Statewide Demand Occupation List.

Consensus:

The Conference agreed to training level, annual openings, growth rate, and mean wage criteria for Individual Training Account (ITA) Occupations and for High Skill / High Wage (HS/HW) Occupations. The Conference also agreed to increase the FY 2009-10 HS/HW mean and entry wage by applying the Employment Cost Index produced by the U.S. Department of Labor, Bureau of Labor Statistics to the FY 2007-08 consensus HS/HW wage criteria.

For the 2009-10 Statewide Demand Occupations List, the consensus criteria are:

1. The occupation requires postsecondary adult vocational training or a community college credit certificate, applied technology diploma, associate of applied science degree or associate degree: AND
2. The occupation has 150 projected annual openings AND the projected growth rate for the occupation is above the average growth rate for all occupations (1.65%); OR the occupation has 360 projected annual openings and ANY positive growth; AND
3. For ITA occupations, the occupation pays at least a mean wage of \$12.44 per hour AND an entry wage of \$10.11 per hour. For HS/HW occupations, the occupation pays at least a mean wage of \$19.49 per hour AND an entry wage of \$12.44 per hour.

The chart below compares the consensus criteria adopted for FY 2009-10 to the previous consensus criteria for FY 2008-09.

| Consensus Criteria | FY 2008-09 (OLD) | FY 2009-10 (NEW) |
|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| Education/Training Level | Requires postsecondary adult vocational training or a community college credit certificate, applied technology diploma, associate of applied science degree or associate degree | Same |
| Annual openings | 150 with projected growth rate above average for all occupations 360 with any growth | Same |
| Projected average growth rate for all occupations | 1.90% average growth | 1.65% average growth |
| Individual Training Account Occupations: 1. Mean Wage 2. Entry Wage | 1. \$12.05 / hour 2. \$ 9.80 / hour | 1. \$12.44 / hour 2. \$10.11 / hour |
| High Skilled / High Wage Occupations: 1. Mean Wage 2. Entry Wage | 1. \$18.89 / hour 2. \$12.05 / hour | 1. \$19.49 / hour 2. \$12.44 / hour |
| Employment Cost Index used to adjust High Skilled / High Wage Occupations | 3.4% increase over FY 2006-07 | 3.2% increase over FY 2007-08 |

Applying these criteria, the FY 2009-10 Statewide Demand Occupations List included 116 occupations. The Conference adopted the list with the addition of the “short-term supply indicator” described in the Discussion section above. Details are shown in the handouts.

Florida Labor Market and Economic Update

Workforce Estimating Conference

**Florida Agency for Workforce Innovation
Labor Market Statistics Center**



August 2008

Labor Force Conditions

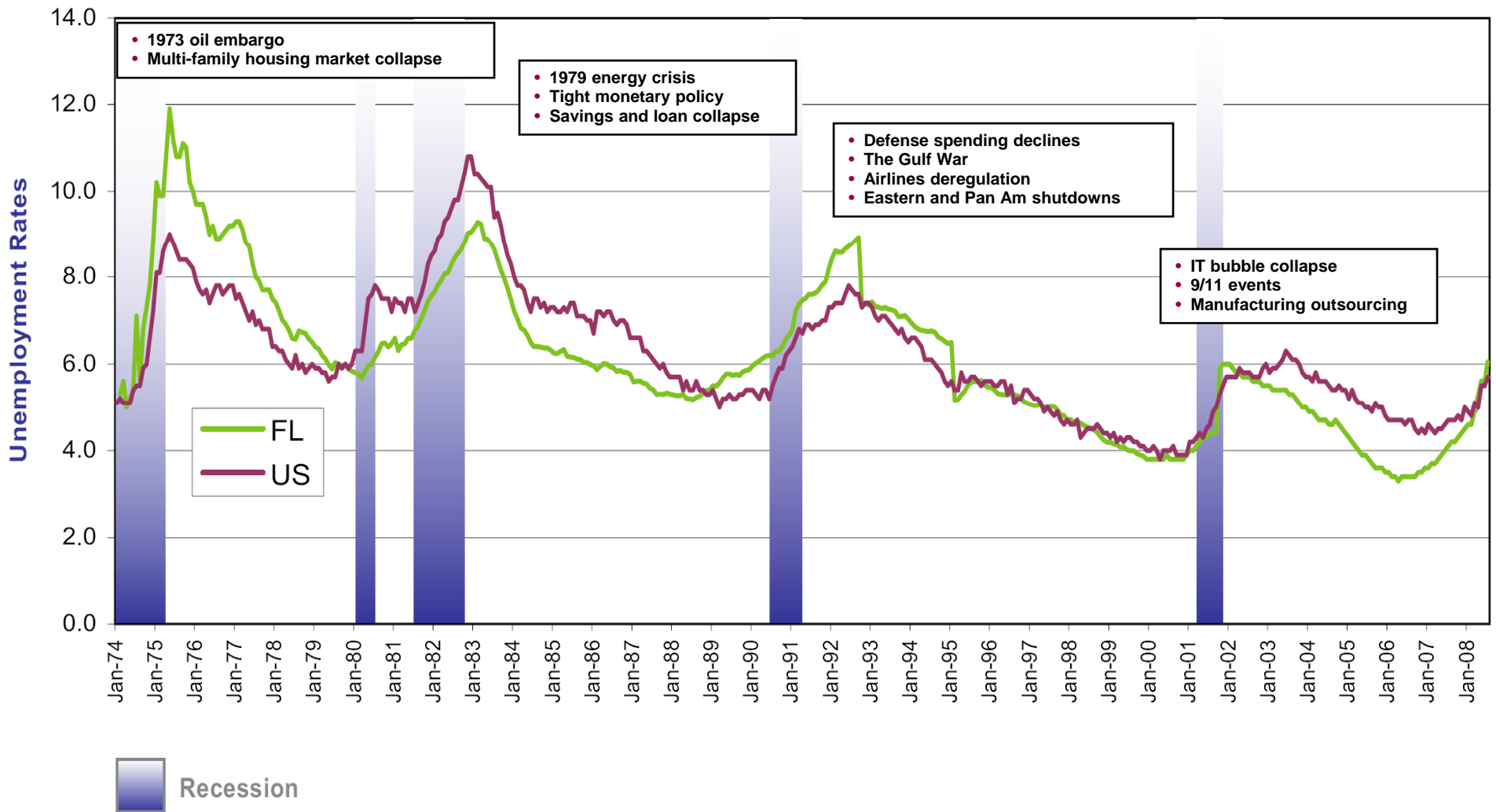
July 2008, Seasonally Adjusted

July 2008

| | Labor Force | Employment | Unemployment | Unemployment Rate | Year Ago Unemployment Rate |
|---------------|-------------|-------------|--------------|-------------------|----------------------------|
| Florida | 9,333,000 | 8,761,000 | 572,000 | 6.1 | 4.1 |
| United States | 154,603,000 | 145,819,000 | 8,784,000 | 5.7 | 4.7 |

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Local Area Unemployment Statistics Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, released August 15, 2008.

Unemployment Rates Seasonally Adjusted Florida and the United States January 1974 – July 2008



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Local Area Unemployment Statistics Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, released August 15, 2008.

Nonagricultural Employment

| Seasonally Adjusted | July 2008 | July 2007 | Over-the-Year Change | Over-the-Year Percent Change |
|----------------------------|--------------------|--------------------|---------------------------------|---------------------------------------------|
| Florida | 7,924,000 | 8,020,800 | -96,800 | -1.2% |
| United States | 137,615,000 | 137,682,000 | -67,000 | * |

* = Less than 0.05 percent.

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Current Employment Statistics Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, released August 15, 2008.

Employment in the Ten Most Populous States

Seasonally Adjusted

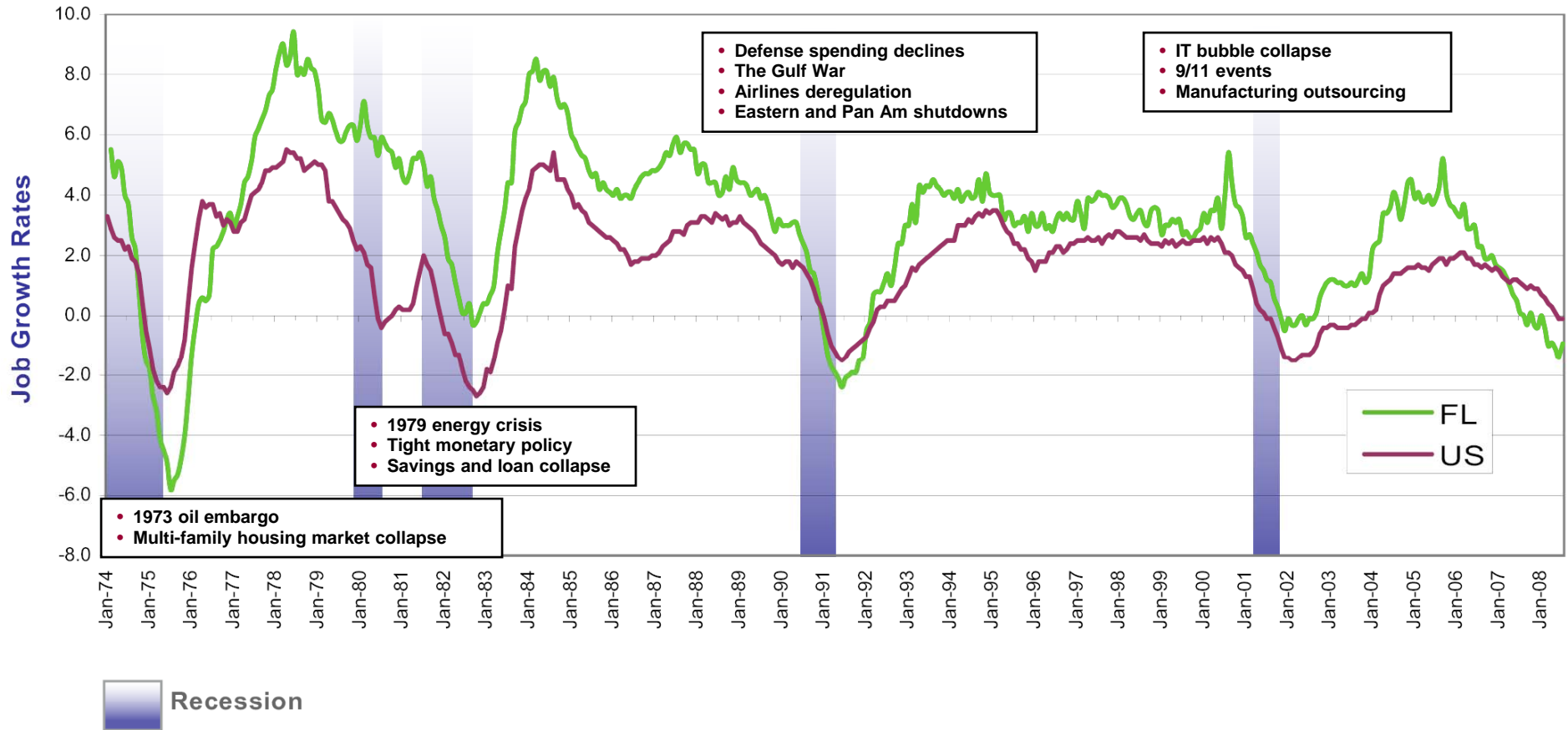
July 2007 - July 2008

| State | July 2008 | Percent Change | Level Change | Level Rank |
|----------------|------------|----------------|--------------|------------|
| Texas | 10,629,700 | 2.4 | 248,700 | 1 |
| North Carolina | 4,174,500 | 0.9 | 38,300 | 2 |
| New York | 8,771,800 | 0.2 | 15,000 | 3 |
| Illinois | 5,979,600 | * | -100 | 4 |
| Pennsylvania | 5,803,800 | * | -500 | 5 |
| Ohio | 5,408,300 | -0.2 | -13,300 | 6 |
| Georgia | 4,132,600 | -0.3 | -14,000 | 7 |
| Michigan | 4,212,500 | -1.1 | -48,700 | 8 |
| California | 15,116,800 | -0.5 | -75,900 | 9 |
| Florida | 7,924,000 | -1.2 | -96,800 | 10 |

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center and the U.S. Department of Labor, Bureau of Labor Statistics, Current Employment Statistics Program, released August 15, 2008.

Nonagricultural Employment Florida and the United States

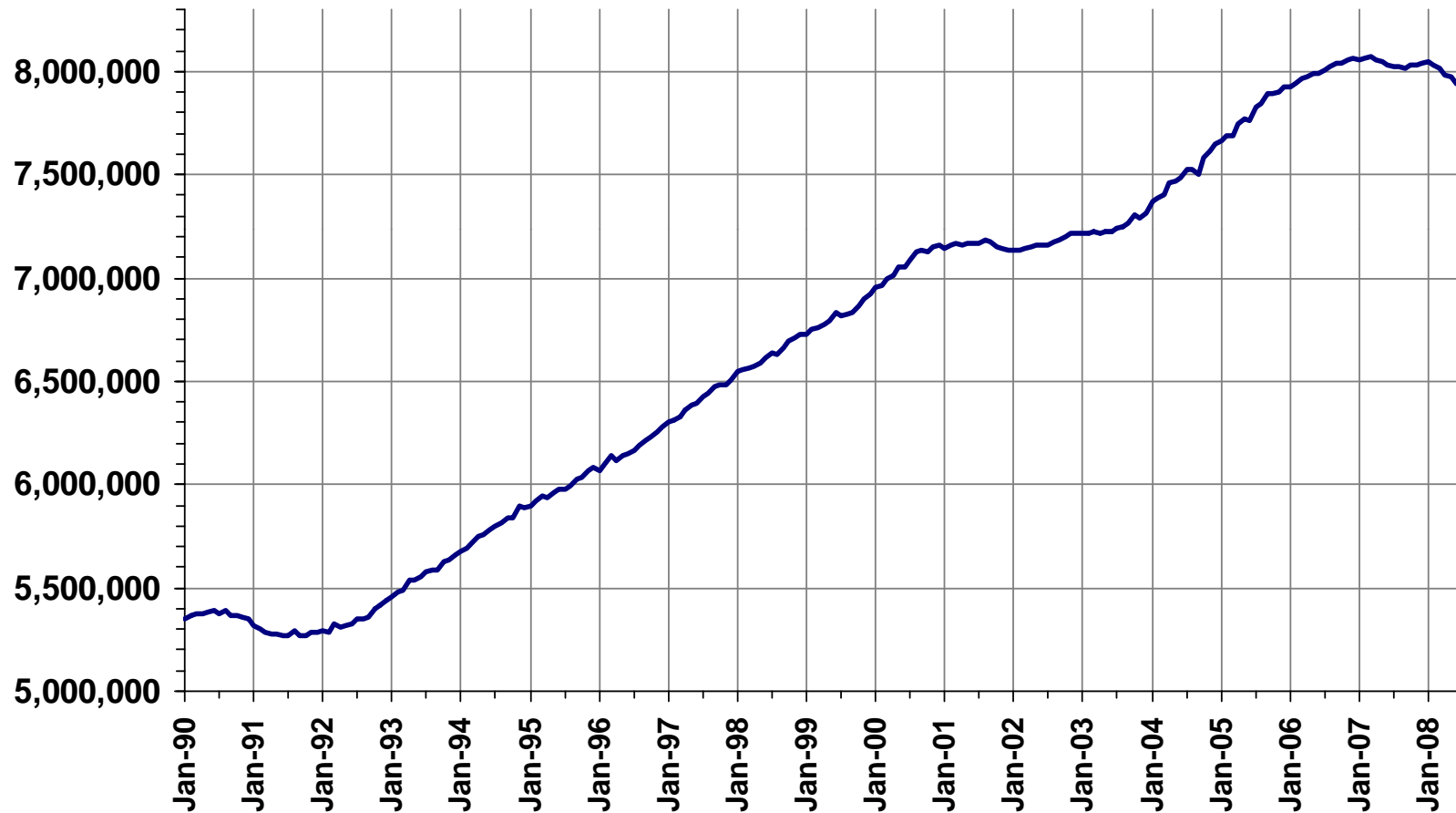
January 1974 – July 2008, Not Seasonally Adjusted
Over-the-Year Job Growth Rates



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Current Employment Statistics Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, released August 15, 2008.

Florida Nonagricultural Employment

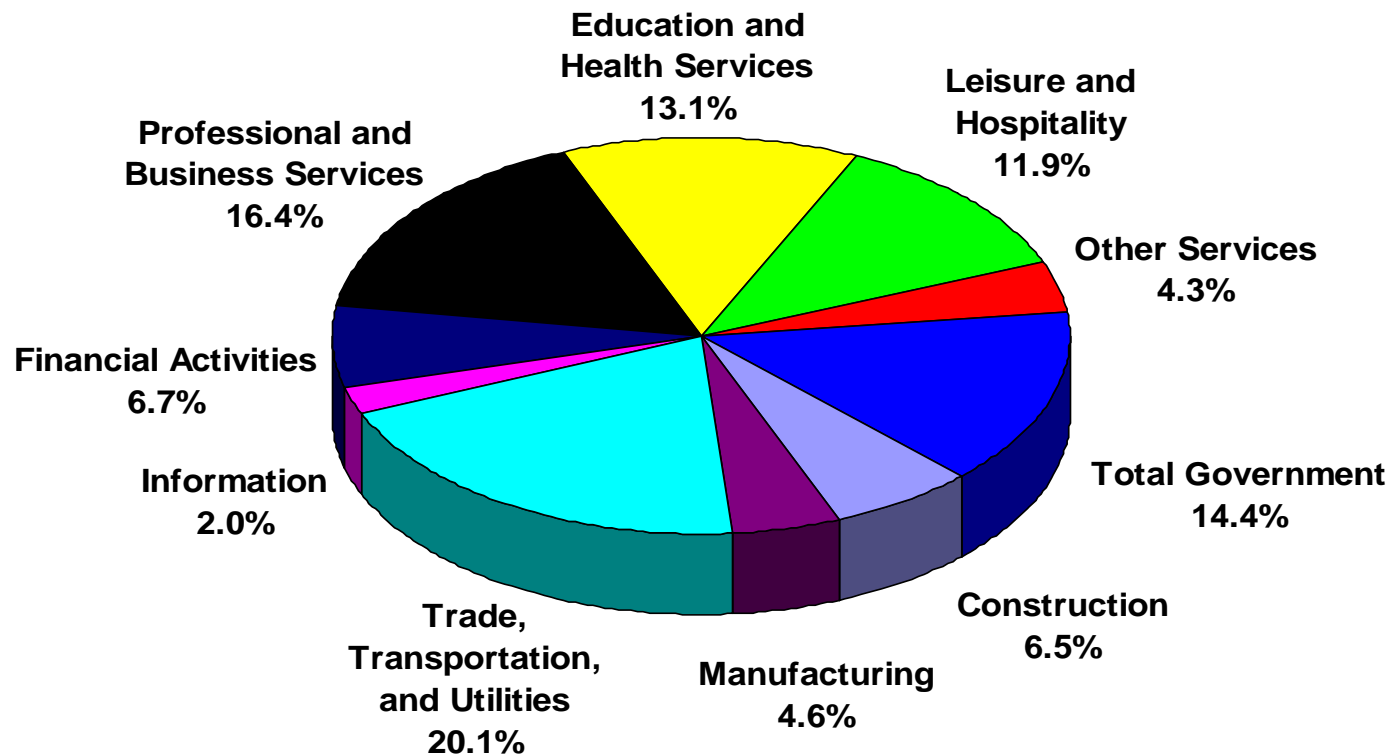
January 1990 – July 2008, Seasonally Adjusted



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Current Employment Statistics Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, released August 15, 2008.

Florida's Nonagricultural Employment by Industry

July 2008, Seasonally Adjusted



Note: Percents may not add to 100.0 due to rounding.

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Current Employment Statistics Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, released August 15, 2008.



Job Declines

Florida's job growth continued the negative trend started in September 2007. Total job growth has declined from a high of 5.2 percent in September 2005 to -1.2 percent in July 2008. The industries listed below have contributed to a negative job growth in Florida:

- Declining jobs in construction
 - Over-the-year employment growth in construction has declined from a high of 13.8 percent in September 2005 to -13.4 percent in July 2008. This slowing was caused by falling demand in the specialty trade contractors, construction of buildings, and building equipment contractors industries as a result of declining housing market and the ending of hurricane recovery activities.



Job Declines

continued

- Declining jobs in manufacturing
 - Over-the-year manufacturing job gains have fallen from a peak of 2.0 percent in January 2006 to -5.4 percent in July 2008. Durable goods manufacturing, specifically fabricated metal products, computer and electronic products, and transportation equipment have been in decline. In nondurable goods manufacturing, printing and related manufacturing and chemical manufacturing accounted for most of the decrease.
- Declining jobs in information (telecommunications, newspapers, and internet service providers)
 - Over-the-year employment in information declined from a peak of 1.7 percent in September 2005 to -2.4 percent in July 2008. This slowing was due to the publishing, internet service providers, and telecommunications industries.



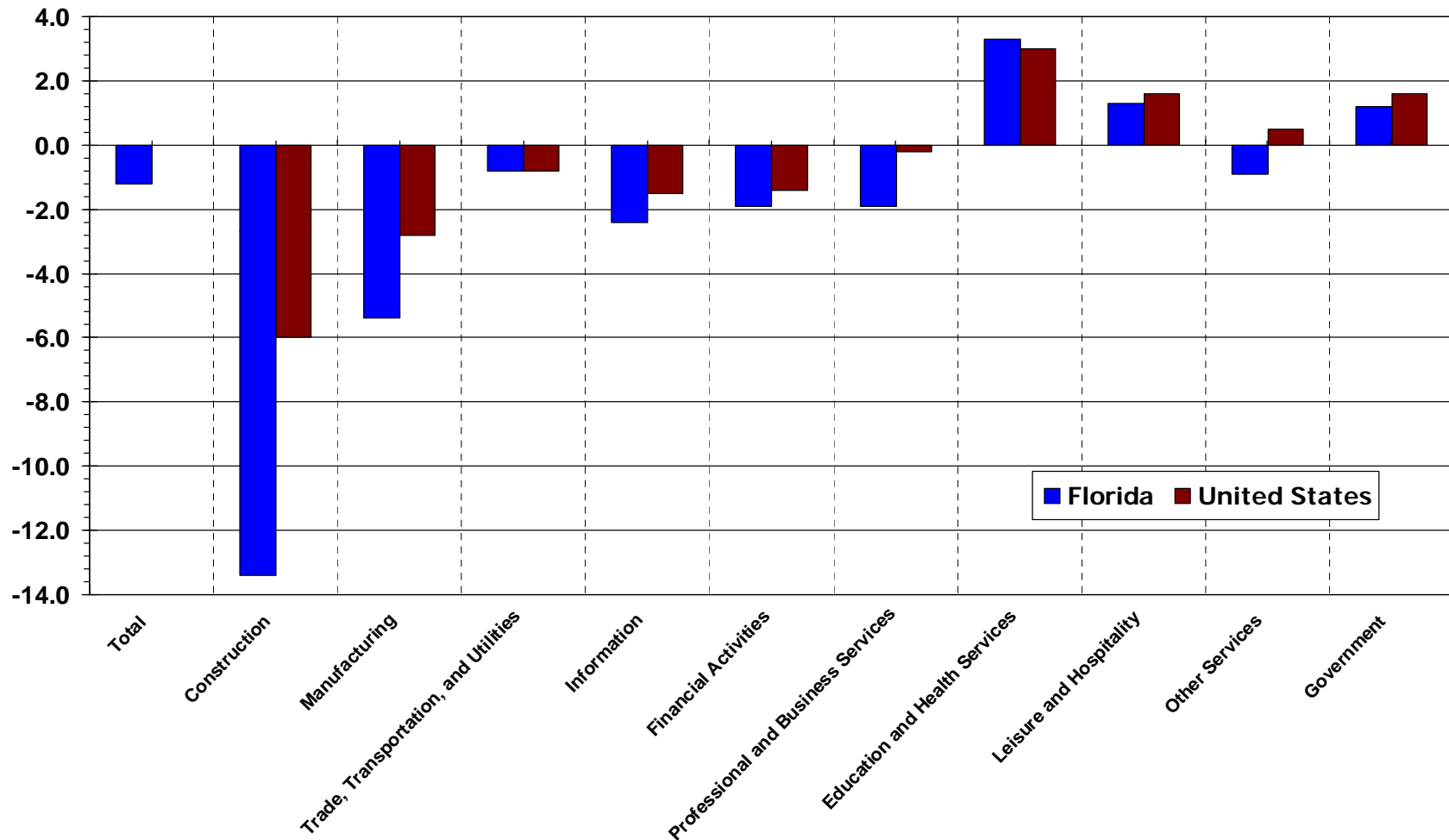
Job Declines

continued

- Declining jobs in financial activities
 - Over-the-year employment growth in financial activities has declined from a high of 5.9 percent in September 2005 to -1.9 percent in July 2008. This slowing was due to the finance and insurance industry and to the real estate, rental and leasing industry, and it is related to the downturn that started with subprime mortgage loans and the housing industry.

Nonagricultural Employment by Industry

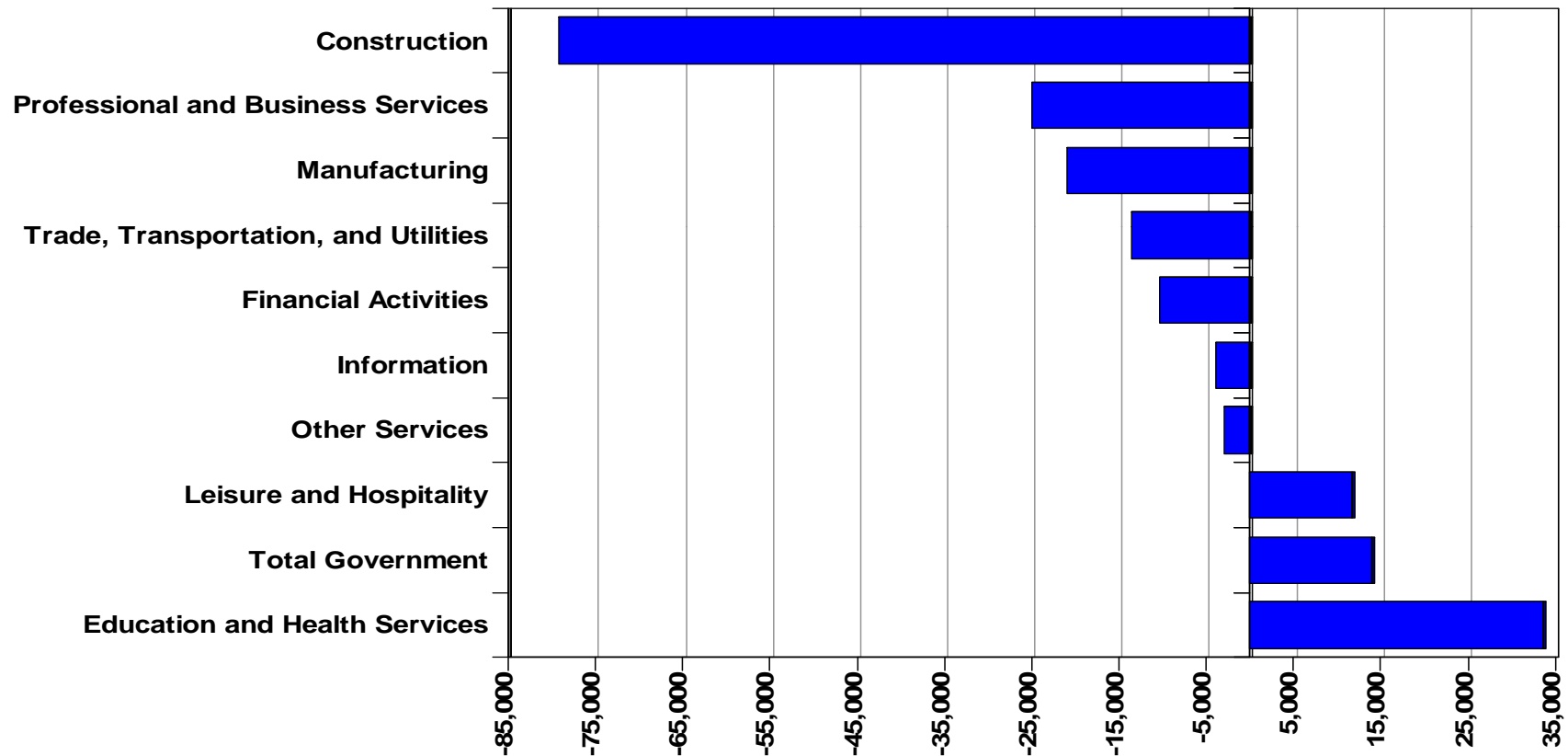
July 2008, Seasonally Adjusted, Over-the-Year Percent Change



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Current Employment Statistics Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, released August 15, 2008.

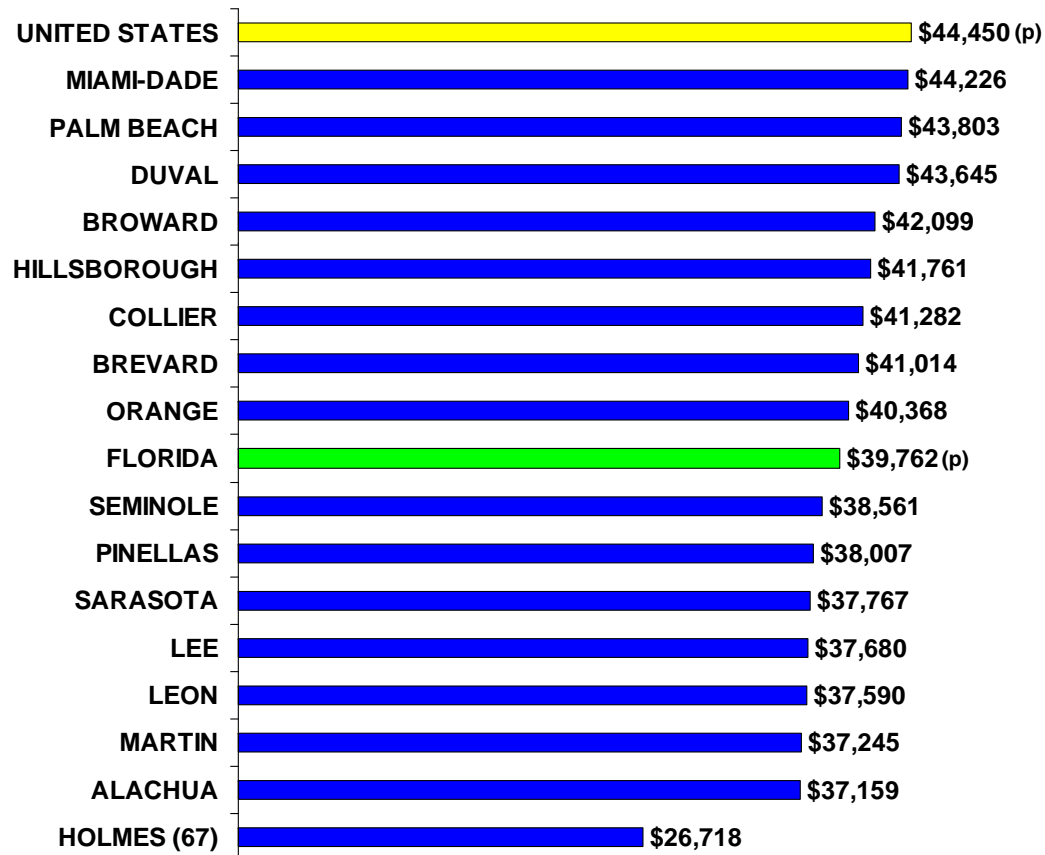
Florida Employment Change by Industry

July 2007 – July 2008, Seasonally Adjusted



Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Current Employment Statistics Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, released August 15, 2008.

Florida Average Annual Wages Range from \$44,226 to \$26,718



(p) = preliminary

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, 2007 Wage Data, released July 2008.

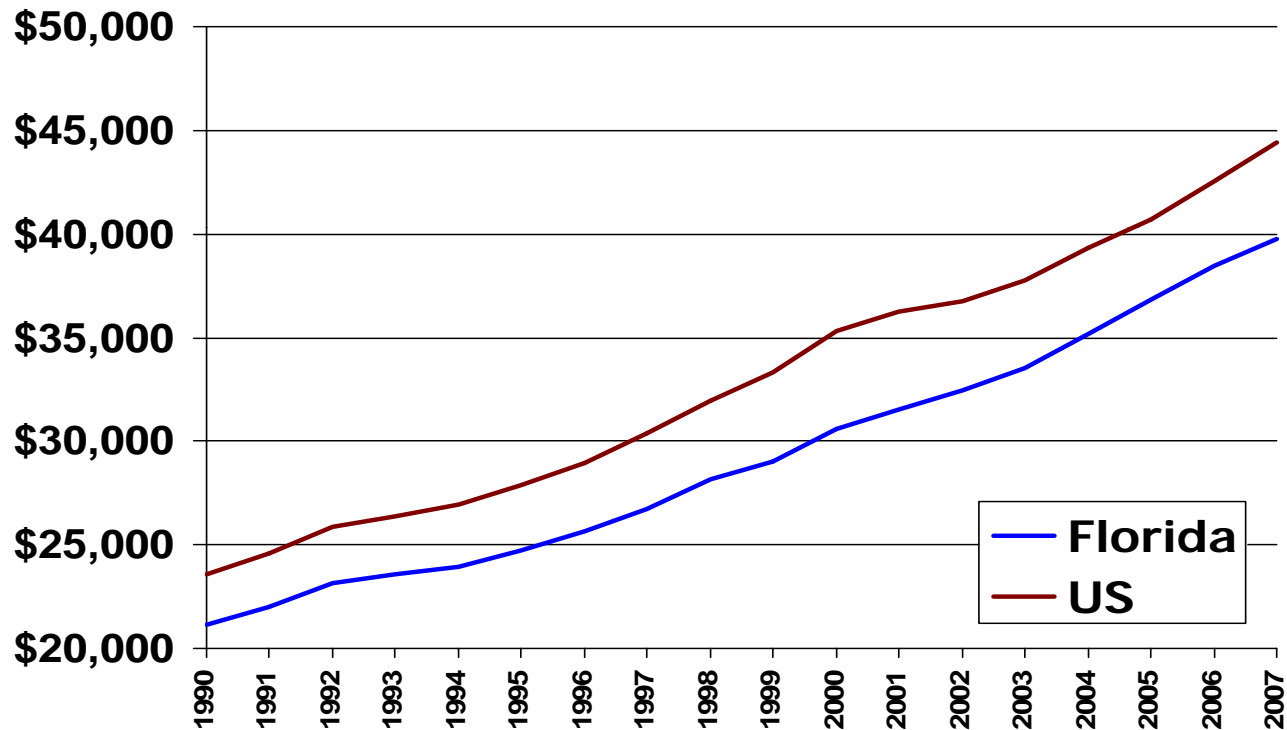
Florida Wages by Industry

Information and Financial Activities Lead the State

| Industry | 2007 Average Annual Wage |
|--------------------------------------|-----------------------------------------|
| Total | \$39,762 |
| Information | \$56,894 |
| Financial Activities | \$56,551 |
| Manufacturing | \$47,490 |
| Government | \$44,956 |
| Professional and Business Services | \$43,807 |
| Construction | \$41,644 |
| Education and Health Services | \$41,147 |
| Trade, Transportation, and Utilities | \$35,942 |
| Other Services | \$27,895 |
| Natural Resources and Mining | \$24,198 |
| Leisure and Hospitality | \$20,822 |

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment & Wages Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, 2007 Wage Data, released July 2008.

Average Annual Wage



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, 2007 Wage Data, released July 2008.



**Florida
Agency for Workforce Innovation
Labor Market Statistics Center**

**Caldwell Building
MSC G-020
107 E. Madison Street
Tallahassee, Florida 32399-4111**

**Phone (850) 245-7257
FAX (850) 245-7204**

**Rebecca Rust
Rebecca.Rust@flaawi.com**

www.labormarketinfo.com





Employment Projections 2016 Workforce Estimating Conference

**Florida
Agency for Workforce Innovation
Labor Market Statistics Center**

August 2008





Employment Projections -- General Information

- Employment forecast covers the projection period 2008-2016.
- Industry employment forecasts were made using the North American Industry Classification System (NAICS) structure for each 4-digit NAICS code at the state and regional level.
- Historical and projected national industry employment, population, income data, U.S. and Florida unemployment rates, and housing starts were used as independent variables.
- Staffing patterns derived from our 2007 occupational survey, with 56,800 employer responses, representing more than 4.8 million workers were used to produce the occupational projections.
- Many industries currently have employment levels well below their 2006 employment, so some of the job growth projected in this forecast will be the recapturing of jobs lost during the 2006-2008 time period.



Employment Projections -- Considerations

- Reviewed and analyzed the results of the Florida Economic Estimating Conference.
- Used a population forecast with a slower growth rate.
- Incorporated information on numerous plant openings and closings.
- Considered impacts of several potential and /or upcoming business mergers or buyouts.



Employment Projections -- Considerations

- Used current data on NASA contractors to help predict job losses resulting from the shutdown of the Space Shuttle Program.
- Included additional job growth in bio-tech as mandated or expected by some economic development contracts.
- Considered impacts of rising energy costs on consumer spending, air transportation, and trucking.
- Considered potential impacts of property tax reform on future employment growth of state and local governments.



Employment Projections -- Considerations

- Based employment projections of Professional Employment Organizations (PEO) on the assumption that future PEO clients will be assigned an industry code based on the clients' current business activities instead of the industry code of the PEO.
- Adjusted occupational staffing patterns for Employment Services industry to ensure that construction occupations were not over represented in this industry.
- Modified the occupational change factors for construction occupations in the Employment Services industry to ensure that the industry employment shares for construction occupations would not increase.



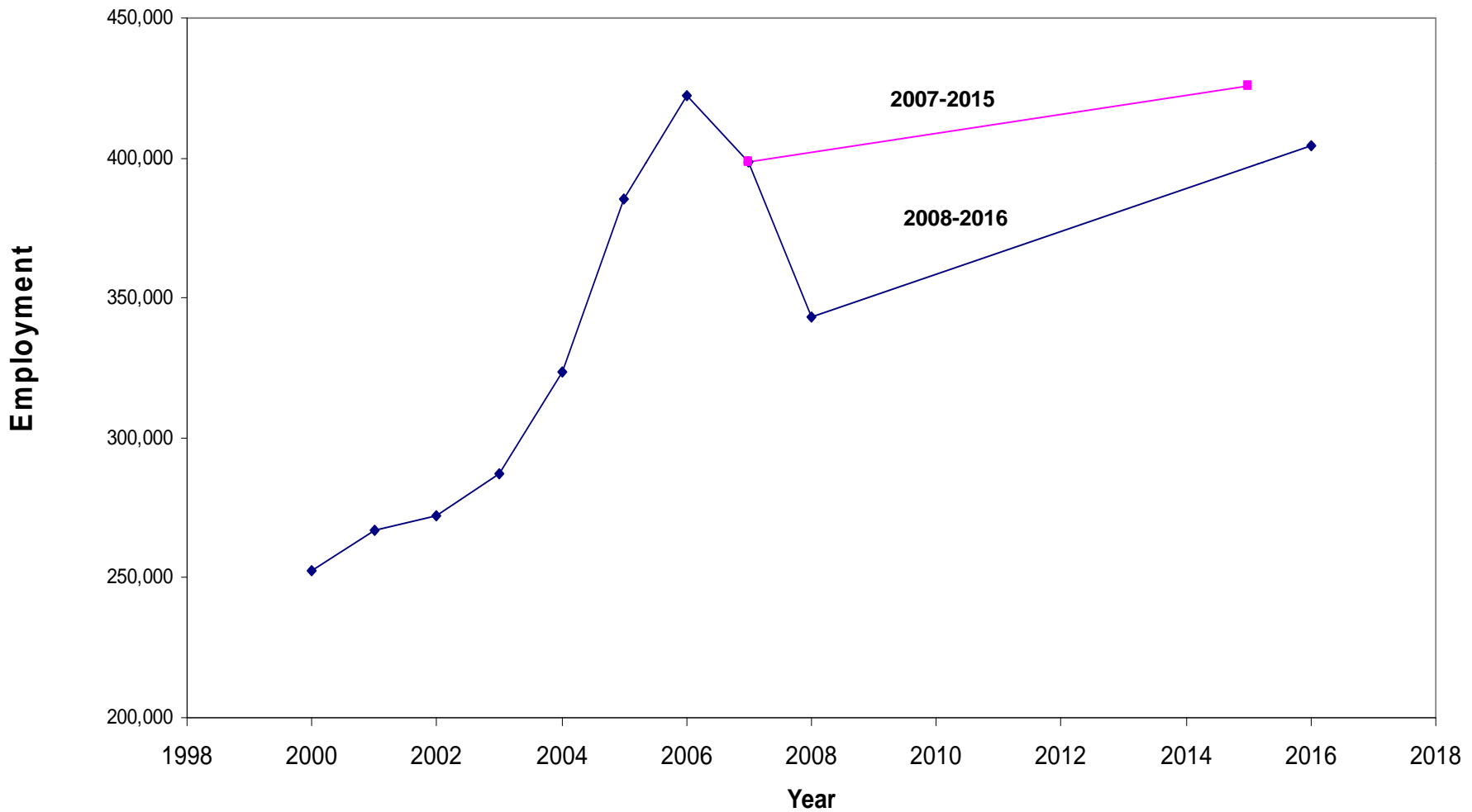
Industry Employment Projections to 2016

- Florida projected to gain almost 1.17 million new jobs between 2008 and 2016 (1.65% annual growth).
- All major industry sectors will see employment gains, except agriculture, mining, and manufacturing.
- Slower growth rates and fewer numerical job gains for 10 of the 12 major industry sectors; 8 of the 12 major sectors will have 2016 employment levels below the employment levels projected for 2015.
- Some of the industries hardest hit by job losses between 2006-08 will experience some of our larger job gains as these industries recover, over the long term, from recent employment declines.



Changes in Base Year Employment Impacts Projected Growth Rates

Example: Specialty Trade Construction Contractors





Industry Employment Projections to 2016

- Major industry sectors growing the fastest: education and health services; and financial activities.
- Major industry sectors gaining the most new jobs: education and health services; and professional and business services.
- Major sectors growing the slowest: information; and government.
- Major declines in construction for the short-term will result in more new jobs and faster growth for this industry in the long-term as this industry recoups a portion of the earlier job losses (83,000 jobs; 15.7% growth).



Industry Employment Projections to 2016

- Manufacturing employment will remain flat: recouping some of the construction-related manufacturing job losses combined with growth in the manufacturing of medical instruments, will offset other manufacturing job losses.
- Retail trade will grow slower than average as weaker consumer demand slows the growth in nearly every sector of this industry. Non-store retailers will grow the fastest (14.5%) and general merchandise stores will gain the most new jobs (26,500 jobs).
- The transportation and warehousing industry employment will be slowed significantly as increased fuel costs hinder job growth.
- The information sector will be driven by gains in software publishing, wireless telecommunications and Internet-related service providers.



Industry Employment Projections to 2016

- The recouping of current job losses in mortgage lending and real estate in the long term, combined with continued steady employment growth in securities and commodity brokers and insurance agents will allow the financial activities industry to post one of the stronger growth rates.
- Growth in management consulting, engineering, computer design, and scientific research services will make professional and business services have faster than average growth, but due to a change in the outlook for the employment services sector the industry will grow slower than previously forecasted.
- Educational services, both private and public, will have 60 percent of its job growth occur in the elementary and secondary schools and 26 percent of the new education jobs at four-year colleges and universities.



Industry Employment Projections to 2016

- Increases in technology, allowing for more outpatient medical procedures, will result in doctors' offices and other outpatient care facilities to account for more than 50 percent of the new jobs in health care.
- Leisure and hospitality is projected to grow at about the average rate, with food services and drinking places accounting for 70 percent of the new jobs, but growing much slower than previously projected.
- Government will be one of our slowest growing industry sectors, but due to the industry's size it may generate significant numbers of new jobs. More than 80 percent of the new jobs in government will be in local government.
- Growth in jobs in the self-employed and unpaid family workers sector will be much slower than the average, accounting for only 6 percent of the new jobs.



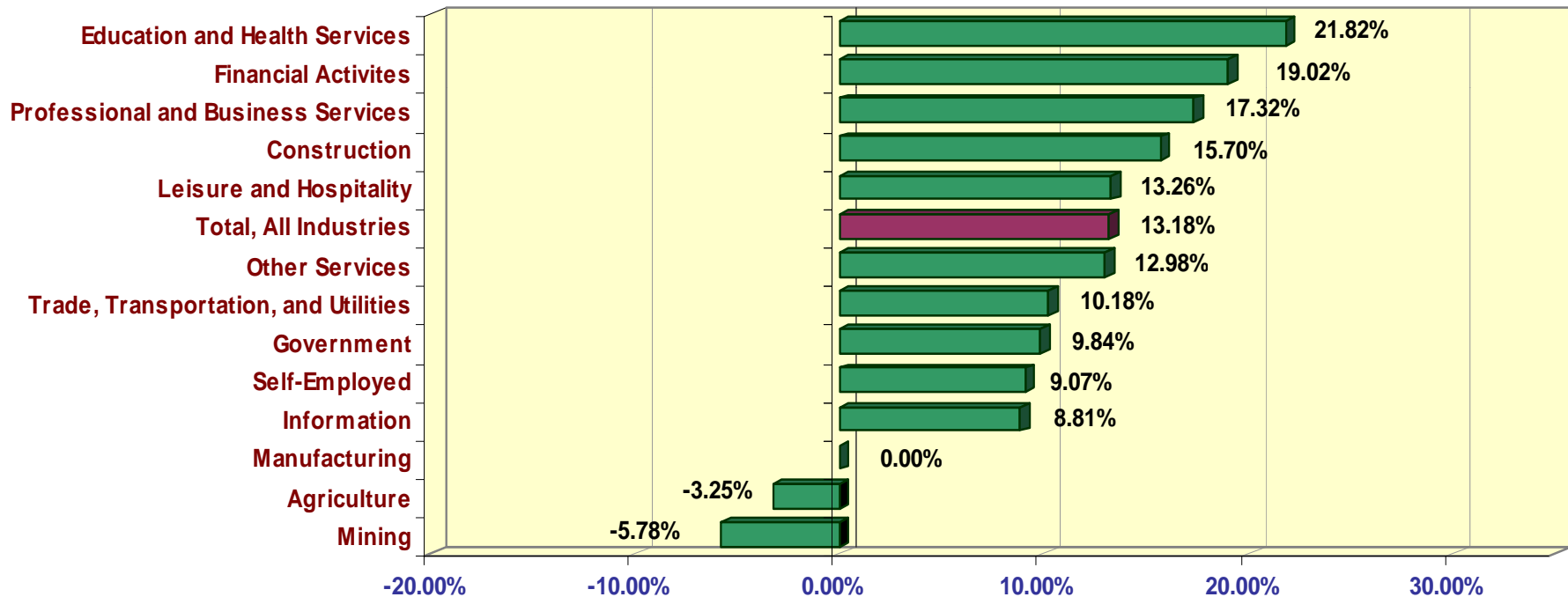
Florida Employment Forecast by Major Industry Sector 2008-2016

| Industry Title | Employment | | Annual Change | | 2008-16 Change | |
|--------------------------------------------|------------|------------|---------------|---------|----------------|---------|
| | 2008 | 2016 | Total | Percent | Total | Percent |
| Total, All Industries | 8,898,999 | 10,072,029 | 146,629 | 1.65 | 1,173,030 | 13.18 |
| Agriculture, Forestry, Fishing and Hunting | 89,782 | 86,865 | -365 | -0.41 | -2,917 | -3.25 |
| Mining | 4,671 | 4,401 | -34 | -0.72 | -270 | -5.78 |
| Construction | 527,503 | 610,329 | 10,353 | 1.96 | 82,826 | 15.70 |
| Manufacturing | 377,364 | 377,357 | - | 0.00 | - | 0.00 |
| Trade, Transportation, and Utilities | 1,613,980 | 1,778,312 | 20,542 | 1.27 | 164,332 | 10.18 |
| Information | 171,211 | 186,295 | 1,886 | 1.10 | 15,084 | 8.81 |
| Financial Activities | 548,309 | 652,573 | 13,033 | 2.38 | 104,264 | 19.02 |
| Professional and Business Services | 1,354,281 | 1,588,776 | 29,312 | 2.16 | 234,495 | 17.32 |
| Education and Health Services | 1,032,133 | 1,257,313 | 28,148 | 2.73 | 225,180 | 21.82 |
| Leisure and Hospitality | 943,831 | 1,068,962 | 15,641 | 1.66 | 125,131 | 13.26 |
| Other Services | 341,411 | 385,739 | 5,541 | 1.62 | 44,328 | 12.98 |
| Government | 1,129,491 | 1,240,679 | 13,898 | 1.23 | 111,188 | 9.84 |
| Self-Employed and Unpaid Family Workers | 765,032 | 834,428 | 8,674 | 1.13 | 69,396 | 9.07 |

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center



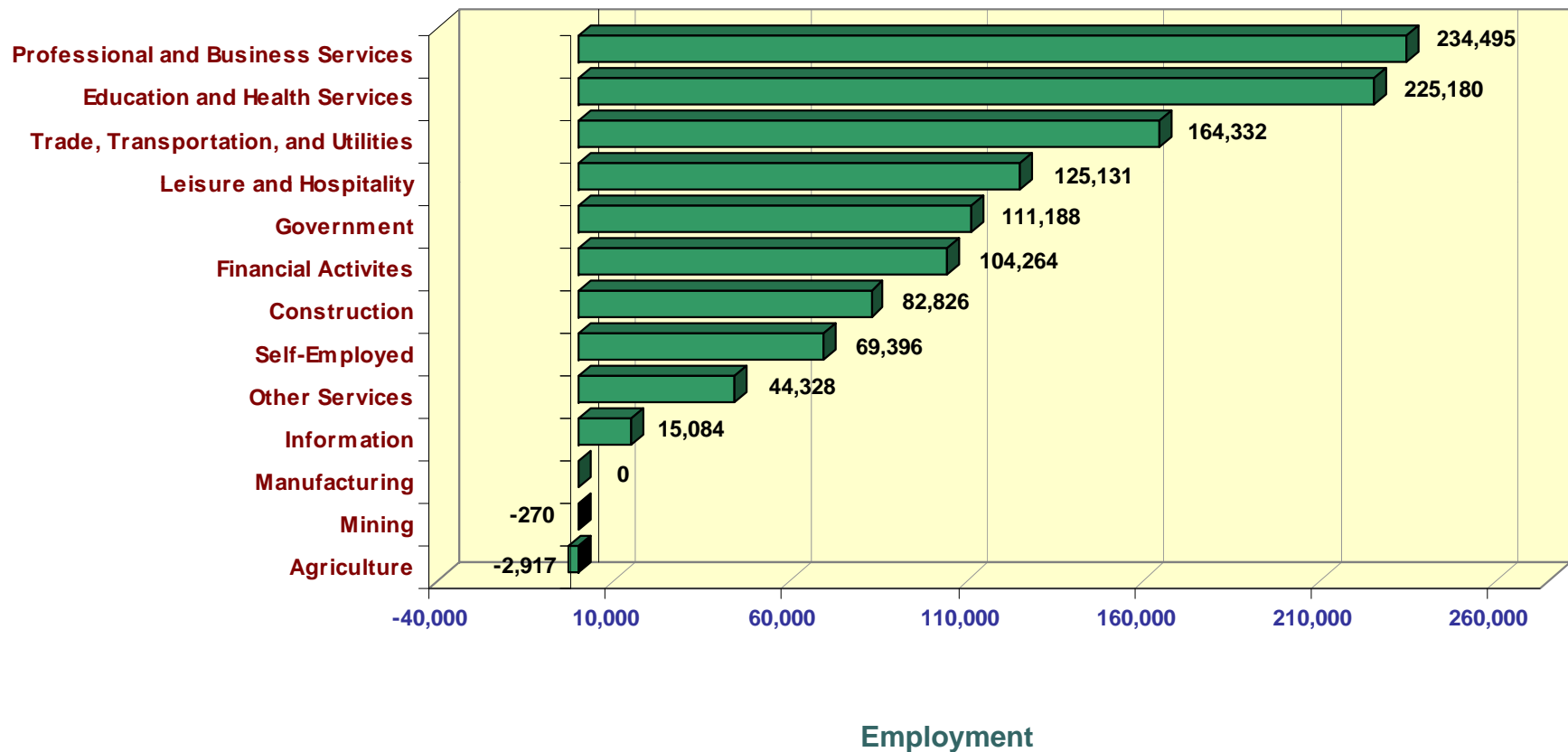
Florida Employment Growth Rates by Major Industry Sector 2008-2016



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center



Florida Employment Growth by Major Industry Sector 2008-2016



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center



Fastest-Growing Industries*

| RANK | INDUSTRY TITLE | ANNUAL CHANGE | |
|------|--------------------------------------------------------|---------------|---------|
| | | NUMERICAL | PERCENT |
| 1 | Social Assistance | 4,418 | 3.88 |
| 2 | Professional, Scientific, and Technical Services | 16,997 | 3.63 |
| 3 | Wood Product Manufacturing | 439 | 3.16 |
| 4 | Wholesale Electronic Markets and Agents and Brokers | 1,474 | 3.14 |
| 5 | Educational Services (private only) | 4,189 | 3.12 |
| 6 | Ambulatory Health Care Services | 11,240 | 3.03 |
| 7 | Credit Intermediation and Related Activities | 5,224 | 2.77 |
| 8 | ISPs, Web Search Portals, and Data Processing Services | 725 | 2.73 |
| 9 | Securities, Commodity Contracts, and Other Investments | 1,085 | 2.56 |
| 10 | Insurance Carriers and Related Activities | 3,522 | 2.52 |

ISP = Internet Service Provider

*includes industries with a minimum of 3,500 jobs in 2007

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center



Industries Gaining the Most New Jobs

| RANK | INDUSTRY TITLE | ANNUAL CHANGE | |
|------|--------------------------------------------------|---------------|---------|
| | | NUMERICAL | PERCENT |
| 1 | Professional, Scientific, and Technical Services | 16,997 | 3.63 |
| 2 | Local Government | 11,597 | 1.48 |
| 3 | Ambulatory Health Care Services | 11,240 | 3.03 |
| 4 | Food Services and Drinking Places | 11,063 | 1.85 |
| 5 | Administrative and Support Services | 10,054 | 1.28 |
| 6 | Specialty Trade Contractors | 7,622 | 2.22 |
| 7 | Credit Intermediation and Related Activities | 5,224 | 2.77 |
| 8 | Social Assistance | 4,418 | 3.88 |
| 9 | Hospitals | 4,344 | 1.76 |
| 10 | Educational Services (private only) | 4,189 | 3.12 |

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center



Occupational Employment Projections to 2016

- All 22 major occupational groups are projected to grow, with 19 groups growing at a slower rate and 17 groups gaining fewer new jobs than previously forecasted.
- Five occupational groups; clerical, sales, food service, health professionals, and education, will account for almost 50 percent of the new jobs.
- Computer, legal and healthcare support occupations will grow the fastest.
- Clerical, sales, and food service occupations will gain the most new jobs.



Occupational Employment Projections to 2016

- 6 of the 10 fastest-growing occupations are in the healthcare or computer career fields.
- All of the 10 fast-growing occupations require either postsecondary vocational training or a community college certificate or degree.
- 5 of the 10 fastest-growing occupations earn more than \$21 per hour.
- 8 of the top 10 occupations expected to gain the most new jobs are the same occupations previously projected to gain the most jobs in 2015.
- Of the top 10 occupations expected to gain the most new jobs, most are the largest occupations in the state, have widespread demand among numerous industries, include a lot of part-time work, and have minimal requirements for entry into the occupation.
- Overall, more job openings will be due to replacement needs than due to economic growth as exits out of the labor force accelerate and the creation of new jobs becomes more challenging.



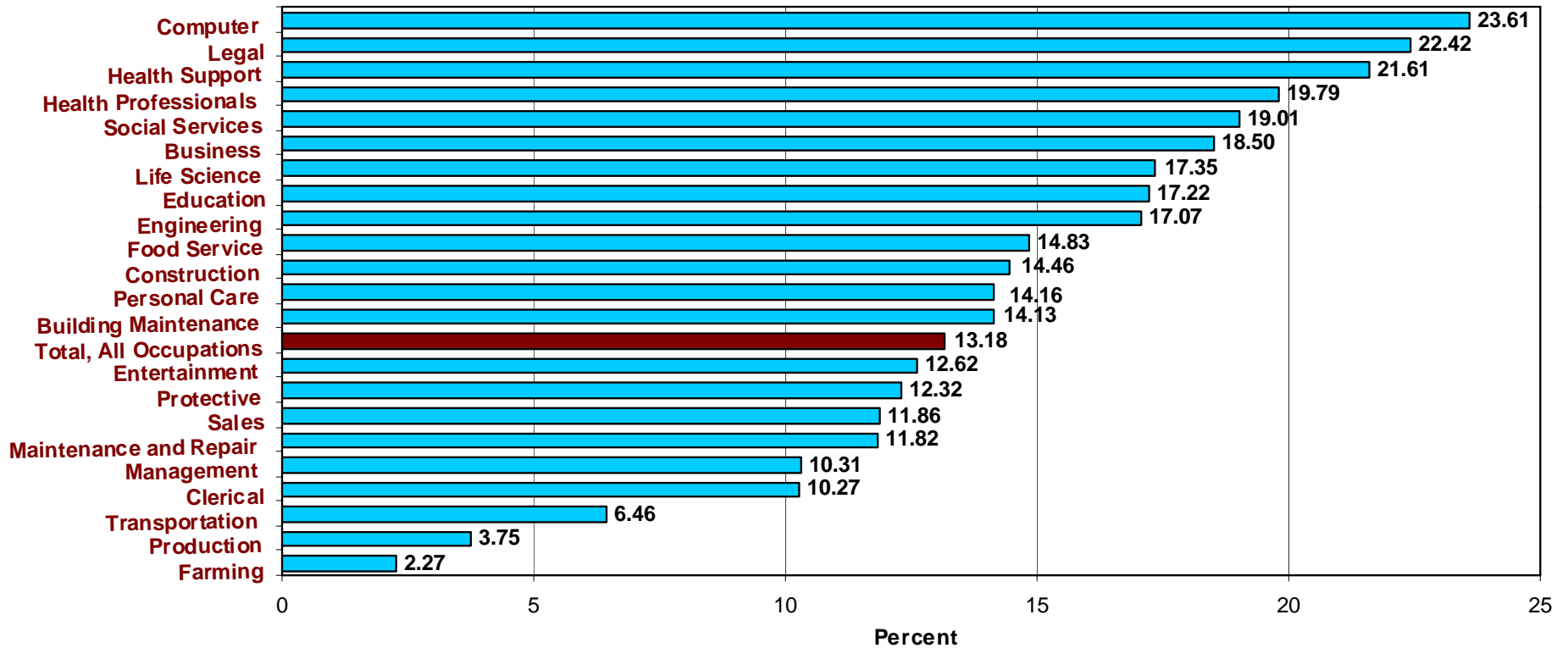
Florida Employment Forecast by Major Occupational Group 2008-2016

| Occupational Group | Employment | | 2008-16 Change | |
|-----------------------------------------------|------------|------------|----------------|---------|
| | 2008 | 2016 | Numerical | Percent |
| Total, All Occupations | 8,899,028 | 10,072,029 | 1,173,001 | 13.18 |
| Management | 365,466 | 403,155 | 37,689 | 10.31 |
| Business and Financial Operations | 446,599 | 529,230 | 82,631 | 18.50 |
| Computer and Mathematical | 167,033 | 206,465 | 39,432 | 23.61 |
| Architecture and Engineering | 137,368 | 160,823 | 23,455 | 17.07 |
| Life, Physical, and Social Science | 53,779 | 63,107 | 9,328 | 17.35 |
| Community and Social Services | 115,529 | 137,496 | 21,967 | 19.01 |
| Legal | 89,718 | 109,834 | 20,116 | 22.42 |
| Education, Training, and Library | 439,741 | 515,444 | 75,703 | 17.22 |
| Arts, Entertainment, Sports, and Media | 155,960 | 175,636 | 19,676 | 12.62 |
| Healthcare Practitioners and Technical | 458,175 | 548,850 | 90,675 | 19.79 |
| Healthcare Support | 228,864 | 278,330 | 49,466 | 21.61 |
| Protective Service | 225,074 | 252,796 | 27,722 | 12.32 |
| Food Preparation and Serving Related | 758,934 | 871,467 | 112,533 | 14.83 |
| Building and Grounds Cleaning and Maintenance | 370,460 | 422,808 | 52,348 | 14.13 |
| Personal Care and Service | 291,443 | 332,716 | 41,273 | 14.16 |
| Sales and Related | 1,172,012 | 1,311,029 | 139,017 | 11.86 |
| Office and Administrative Support | 1,607,946 | 1,773,138 | 165,192 | 10.27 |
| Farming, Fishing, and Forestry | 77,584 | 79,343 | 1,759 | 2.27 |
| Construction and Extraction | 507,354 | 580,725 | 73,371 | 14.46 |
| Installation, Maintenance, and Repair | 365,620 | 408,826 | 43,206 | 11.82 |
| Production | 345,799 | 358,760 | 12,961 | 3.75 |
| Transportation and Material-Moving | 518,570 | 552,051 | 33,481 | 6.46 |

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center



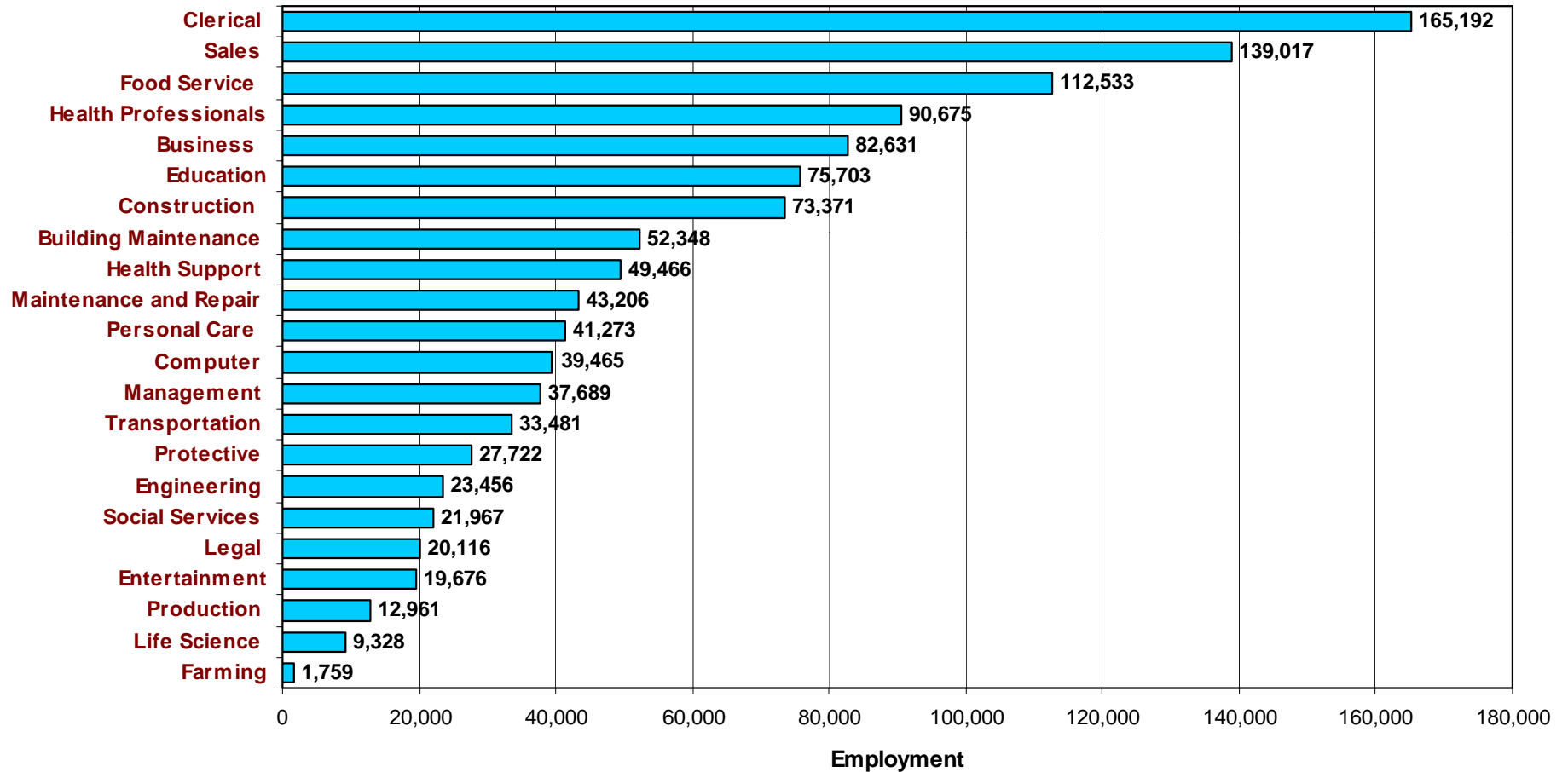
Florida Employment Growth Rates by Major Occupational Group 2008-2016



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center



Florida Employment Growth by Major Occupational Group 2008-2016



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center



Fastest-Growing Occupations*

| RANK | OCCUPATIONAL TITLE | ANNUAL GROWTH | | AVERAGE | EDUCATIONAL ATTAINMENT |
|------|--------------------------------------------------|---------------|-----------|-------------|------------------------|
| | | PERCENT | NUMERICAL | HOURLY WAGE | |
| 1 | Network Systems and Data Communications Analysts | 5.27 | 1,226 | 30.52 | PSAV Cert. |
| 2 | Computer Software Engineers, Applications | 5.12 | 990 | 37.21 | CC Cert./Degree |
| 3 | Veterinary Technologists and Technicians | 4.97 | 316 | 12.47 | CC Cert./Degree |
| 4 | Home Health Aides | 4.09 | 1,318 | 10.29 | PSAV Cert. |
| 5 | Personal and Home Care Aides | 3.96 | 457 | 9.82 | PSAV Cert. |
| 6 | Paralegals and Legal Assistants | 3.89 | 812 | 21.67 | PSAV Cert. |
| 7 | Pharmacy Technicians | 3.86 | 884 | 13.38 | PSAV Cert. |
| 8 | Medical Assistants | 3.83 | 1,289 | 13.35 | PSAV Cert. |
| 9 | Surveyors | 3.67 | 156 | 26.23 | CC Cert./Degree |
| 10 | Financial Analysts | 3.44 | 275 | 33.64 | CC Cert./Degree |

* includes occupations with a minimum of 4,000 jobs in 2007

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, 2008 Wage Data, Forecast to 2016



Occupations Gaining the Most New Jobs

| RANK | OCCUPATIONAL TITLE | ANNUAL GROWTH | | AVERAGE | EDUCATIONAL |
|------|---------------------------------------------------------|---------------|-----------|-------------|-----------------|
| | | PERCENT | NUMERICAL | HOURLY WAGE | ATTAINMENT |
| 1 | Retail Salespersons | 1.90 | 5,593 | 13.35 | High School |
| 2 | Customer Service Representatives | 2.99 | 5,183 | 14.05 | PSAV Cert. |
| 3 | Registered Nurses | 2.66 | 4,164 | 29.52 | CC Cert./Degree |
| 4 | Food Preparation & Serving Workers, Including Fast Food | 2.27 | 3,889 | 8.31 | Less than H.S. |
| 5 | Waiters and Waitresses | 1.68 | 3,451 | 9.94 | Less than H.S. |
| 6 | Office Clerks, General | 1.72 | 3,355 | 11.92 | High School |
| 7 | Bookkeeping, Accounting, and Auditing Clerks | 1.91 | 2,550 | 15.51 | CC Cert./Degree |
| 8 | Janitors and Cleaners, Except Maids and Housekeeping | 1.86 | 2,394 | 10.23 | Less than H.S. |
| 9 | Executive Secretaries and Administrative Assistants | 2.01 | 2,232 | 18.44 | PSAV Cert. |
| 10 | Landscaping and Groundskeeping Workers | 1.86 | 2,123 | 11.00 | Less than H.S. |

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, 2008 Wage Data, Forecast to 2016



Occupational Wages

- The 2008 average hourly wage for all occupations is \$18.47, up from \$17.76 (4.0 %) in 2007.
- All 22 major occupational groups had increases in their 2008 average hourly wage. Wage increases ranged from 0.37 percent (legal occupations) to 6.4 percent (transportation occupations) for these major occupational groups.
- The 2008 overall average hourly wage for occupations requiring postsecondary training below a bachelor's degree was \$21.13, up from \$20.83 in 2007.



**Florida
Agency for Workforce Innovation
Labor Market Statistics Center**

**Caldwell Building
MSC G-020
107 E. Madison Street
Tallahassee, Florida 32399-4111**

Phone (850) 245-7211

**Bill Dobson
bill.dobson@flaawi.com**

**www.labormarketinfo.com
fred.labormarketinfo.com
www.floridawages.com
<http://www.whatpeopleareasking.com/index.shtm>**



2009-2010 Florida Demand Occupations List

Florida
Agency for Workforce Innovation
Labor Market Statistics Center

August 2008





Indexing Wage Thresholds Using the Employment Cost Index (ECI)

- The ECI, which is produced by the U.S. Department of Labor, Bureau of Labor Statistics, is a quarterly measure of changes in labor costs.
- Separate indexes are produced each quarter for wage and salary and benefits costs, for public, private, and all civilians workers, and for various industry and occupational groups.
- WEC uses an ECI that includes wages and salaries, all civilian workers for all occupational groups.
- 2nd Quarter 2008 ECI =108.4, 2nd quarter 2007 ECI = 105.0, Annual change = 3.2%.
- Change in ECI for 2008-09 Demand List was 3.4%.



2009-10 Statewide Demand List Occupational Criteria

- Requires postsecondary adult vocational training or a community college credit certificate, applied technology diploma, associates of applied science, or an associate's degree. 2008-09 Criteria: same.
- Has 150 projected annual openings and a growth rate above the average growth rate for all occupations (1.65%) or 360 projected annual openings with any positive growth. 2008-09 Criteria: growth rate 1.89%, openings same.
- Has at least a mean wage of \$12.44/hour and entry wage of \$10.11/hour to be eligible for an Individual Training Account. 2008-09 Criteria: mean wage \$12.05, entry wage \$9.80.
- Requires at least a mean wage of \$19.49/hour and an entry wage of \$12.44/hour for a High Skill/High Wage designation. 2008-09 Criteria: mean wage \$18.89, entry wage \$12.05.



2009-10 Statewide Demand List

- 116 occupations meet the 2009-10 occupational criteria vs. 110 occupations meeting the 2008-09 criteria.

- 16 occupations were added to the 2009-10 list and 10 occupations on the 2008-09 list were dropped from the list.

- Primary reason for occupations dropping off the 2009-10 list are:
 - Failure to meet growth and openings criteria



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2009-10 Florida Statewide Demand Occupations List

Sorted by Occupational Title

Workforce Estimating Conference Selection Criteria:

- 1 FLDOE Training Codes 3 (PSAV Certificate) and 4 (Community College Credit/Degree)
- 2 150 annual openings and average growth rate of 1.65% or 360 annual openings with any positive growth
- 3 Mean Wage of \$12.44/hour and Entry Wage of \$10.11/hour
- 4 High Skill/High Wage (HSHW) Occupations: Mean Wage of \$19.49/hour and Entry Wage of \$12.44/hour

| SOC Code† | HSHW†† | Occupational Title† | Annual | Annual | 2008 Hourly Wage | | FLDOE | New |
|-----------|--------|----------------------------------------------------------|---------|--------|------------------|-------|-------|-----|
| | | | Percent | | Openings | Mean | | |
| 132011 | HSHW | Accountants and Auditors | 2.16 | 3,233 | 29.34 | 18.43 | 4 | |
| 113011 | HSHW | Administrative Services Managers | 1.74 | 385 | 43.04 | 23.69 | 4 | |
| 413011 | HSHW | Advertising Sales Agents | 2.31 | 441 | 23.94 | 12.56 | 3 | Yes |
| 132021 | HSHW | Appraisers and Assessors of Real Estate* | 2.03 | 293 | 28.92 | 15.47 | 3 | |
| 173011 | HSHW | Architectural and Civil Drafters* | 1.88 | 393 | 21.00 | 13.90 | 3 | |
| 274011 | | Audio and Video Equipment Technicians | 3.09 | 262 | 17.29 | 11.82 | 4 | Yes |
| 493023 | | Automotive Service Technicians and Mechanics | 1.59 | 1,887 | 17.08 | 10.48 | 3 | |
| 433031 | | Bookkeeping, Accounting, and Auditing Clerks | 1.91 | 4,558 | 15.51 | 10.88 | 4 | |
| 472021 | | Brickmasons and Blockmasons* | 1.62 | 373 | 18.51 | 12.61 | 3 | Yes |
| 274012 | | Broadcast Technicians | 2.07 | 182 | 20.10 | 11.89 | 4 | Yes |
| 493031 | HSHW | Bus and Truck Mechanics and Diesel Engine Specialists | 1.29 | 474 | 19.83 | 14.68 | 3 | |
| 131199 | HSHW | Business Operations Specialists, All Other | 3.04 | 2,831 | 29.66 | 17.04 | 4 | |
| 292031 | | Cardiovascular Technologists and Technicians | 2.85 | 197 | 19.02 | 11.26 | 3 | |
| 472031 | | Carpenters* | 1.56 | 2,286 | 17.16 | 11.92 | 3 | |
| 472051 | | Cement Masons and Concrete Finishers* | 1.84 | 624 | 15.59 | 11.40 | 3 | |
| 173022 | HSHW | Civil Engineering Technicians* | 2.19 | 213 | 21.89 | 15.03 | 4 | |
| 131031 | HSHW | Claims Adjusters, Examiners, and Investigators | 2.51 | 1,019 | 25.73 | 16.86 | 3 | |
| 272022 | HSHW | Coaches and Scouts | 1.81 | 447 | 24.69 | 13.32 | 4 | |
| 131072 | HSHW | Compensation, Benefits, and Job Analysis Specialists | 2.13 | 181 | 24.33 | 16.50 | 4 | |
| 131041 | HSHW | Compliance Officers, Exc. Safety, Agri, Constr & Transp. | 0.90 | 370 | 23.06 | 15.30 | 3 | |
| 113021 | HSHW | Computer and Information Systems Managers | 2.25 | 260 | 55.14 | 37.18 | 4 | |
| 151021 | HSHW | Computer Programmers | 0.07 | 484 | 33.26 | 21.98 | 3 | |
| 151031 | HSHW | Computer Software Engineers, Applications | 5.12 | 1,243 | 37.21 | 23.34 | 4 | |
| 151041 | | Computer Support Specialists | 1.89 | 1,518 | 18.82 | 12.83 | 3 | |
| 151051 | HSHW | Computer Systems Analysts | 3.40 | 1,370 | 32.59 | 21.09 | 4 | |
| 474011 | HSHW | Construction and Building Inspectors* | 2.39 | 309 | 25.41 | 18.21 | 3 | |
| 119021 | HSHW | Construction Managers* | 2.27 | 1,510 | 43.47 | 25.01 | 4 | |
| 333012 | | Correctional Officers and Jailers | 1.56 | 1,434 | 19.14 | 14.99 | 3 | |
| 131051 | HSHW | Cost Estimators* | 2.70 | 625 | 26.83 | 16.09 | 4 | |
| 232091 | | Court Reporters | 5.17 | 161 | 18.52 | 11.25 | 3 | Yes |
| 151061 | HSHW | Database Administrators | 3.31 | 269 | 31.70 | 20.62 | 4 | |
| 319091 | | Dental Assistants | 3.01 | 723 | 15.79 | 12.07 | 3 | |
| 292021 | HSHW | Dental Hygienists | 3.13 | 474 | 28.29 | 21.45 | 4 | |
| 333021 | HSHW | Detectives and Criminal Investigators | 1.92 | 325 | 29.94 | 20.87 | 3 | Yes |
| 292032 | HSHW | Diagnostic Medical Sonographers | 2.38 | 155 | 27.47 | 20.90 | 3 | |
| 472081 | | Drywall and Ceiling Tile Installers* | 2.58 | 380 | 16.17 | 11.47 | 3 | Yes |
| 472111 | | Electricians* | 1.52 | 1,793 | 18.88 | 13.68 | 3 | |
| 492094 | HSHW | Electronics Repairers, Commercial and Industrial Equip.* | 1.74 | 282 | 21.29 | 14.65 | 3 | Yes |
| 292041 | | Emergency Medical Technicians and Paramedics | 1.88 | 250 | 15.68 | 11.07 | 4 | |
| 131071 | HSHW | Employment, Recruitment, and Placement Specialists | 0.97 | 482 | 22.85 | 14.31 | 4 | |
| 436011 | | Executive Secretaries and Administrative Assistants | 2.01 | 3,933 | 18.44 | 13.13 | 3 | |
| 132051 | HSHW | Financial Analysts | 3.44 | 318 | 33.64 | 20.67 | 4 | |
| 113031 | HSHW | Financial Managers | 1.97 | 641 | 50.60 | 29.52 | 4 | |

*These occupations are associated with industries currently in decline and may have an oversupply of trained workers.

2009-10 Florida Statewide Demand Occupations List

Sorted by Occupational Title

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- 4 High Skill/High Wage (HSHW) Occupations: Mean Wage of \$19.49/hour and Entry Wage of \$12.44/hour

| SOC Code† | HSHW†† | Occupational Title† | Annual | Annual | 2008 Hourly Wage | | FLDOE | New |
|-----------|--------|-------------------------------------------------------------|----------------|--------|------------------|-------|-------|-----|
| | | | Percent Growth | | Openings | Mean | | |
| 332011 | HSHW | Fire Fighters | 1.28 | 1,071 | 22.03 | 14.20 | 3 | |
| 471011 | HSHW | First-Line Superv. of Construction and Extraction Workers* | 1.71 | 1,984 | 27.89 | 19.00 | 4 | |
| 351012 | | First-Line Superv. of Food Preparation & Serving Workers | 1.75 | 1,096 | 16.25 | 11.13 | 3 | |
| 371011 | | First-Line Superv. of Housekeeping & Janitorial Workers | 1.71 | 379 | 16.45 | 11.15 | 3 | |
| 371012 | HSHW | First-Line Superv. of Landscaping and Groundskeeping | 1.91 | 362 | 20.65 | 13.51 | 3 | |
| 531031 | HSHW | First-Line Superv. of Material-Moving Vehicle Operators | 1.47 | 413 | 25.88 | 16.49 | 3 | |
| 491011 | HSHW | First-Line Superv. of Mechanics, Installers, and Repairers* | 1.39 | 870 | 27.45 | 18.32 | 3 | |
| 431011 | HSHW | First-Line Superv. of Office and Admin. Support Workers | 1.35 | 2,574 | 22.42 | 14.30 | 4 | |
| 511011 | HSHW | First-Line Superv. of Production and Operating Workers | 0.64 | 475 | 25.55 | 15.93 | 3 | |
| 411012 | HSHW | First-Line Supervisors of Non-Retail Sales Workers | 1.12 | 903 | 36.35 | 20.64 | 4 | |
| 391021 | HSHW | First-Line Supervisors of Personal Service Workers | 1.32 | 480 | 21.40 | 13.04 | 3 | |
| 411011 | HSHW | First-Line Supervisors of Retail Sales Workers | 1.19 | 3,253 | 21.42 | 13.30 | 3 | |
| 119051 | HSHW | Food Service Managers | 1.19 | 568 | 26.23 | 16.47 | 4 | |
| 111021 | HSHW | General and Operations Managers | 0.89 | 1,811 | 49.30 | 25.16 | 4 | |
| 271024 | | Graphic Designers | 1.63 | 703 | 19.11 | 12.74 | 4 | |
| 499021 | | Heating, A.C., and Refrigeration Mechanics and Installers* | 1.92 | 953 | 18.13 | 12.93 | 3 | |
| 434161 | | Human Resources Assistants, Exc. Payroll | 1.85 | 285 | 17.10 | 12.56 | 3 | |
| 499041 | HSHW | Industrial Machinery Mechanics | 2.37 | 384 | 20.69 | 14.68 | 3 | Yes |
| 259031 | HSHW | Instructional Coordinators | 2.68 | 304 | 26.36 | 16.26 | 4 | |
| 413021 | HSHW | Insurance Sales Agents | 2.47 | 2,239 | 27.13 | 14.03 | 3 | |
| 132053 | HSHW | Insurance Underwriters | 2.42 | 300 | 25.51 | 16.73 | 3 | |
| 271025 | HSHW | Interior Designers* | 2.91 | 324 | 22.88 | 12.81 | 4 | |
| 436012 | | Legal Secretaries | 2.84 | 923 | 18.48 | 13.18 | 3 | |
| 292061 | | Licensed Practical and Licensed Vocational Nurses | 1.91 | 2,346 | 19.15 | 15.64 | 3 | |
| 434131 | | Loan Interviewers and Clerks* | 1.83 | 695 | 16.02 | 11.48 | 3 | |
| 132072 | HSHW | Loan Officers | 3.17 | 1,309 | 28.27 | 15.90 | 4 | |
| 112021 | HSHW | Marketing Managers | 2.58 | 282 | 53.11 | 28.55 | 4 | |
| 292012 | | Medical and Clinical Laboratory Technicians | 2.06 | 247 | 17.79 | 12.08 | 4 | |
| 292011 | HSHW | Medical and Clinical Laboratory Technologists | 1.79 | 312 | 25.17 | 19.65 | 4 | |
| 119111 | HSHW | Medical and Health Services Managers | 2.18 | 349 | 47.75 | 29.07 | 4 | |
| 319092 | | Medical Assistants | 3.83 | 1,674 | 13.35 | 10.43 | 3 | |
| 292071 | | Medical Records and Health Information Technicians | 2.32 | 465 | 15.16 | 10.29 | 4 | |
| 436013 | | Medical Secretaries | 2.11 | 972 | 13.45 | 10.23 | 3 | |
| 319094 | | Medical Transcriptionists | 2.75 | 221 | 15.06 | 12.15 | 3 | |
| 493042 | | Mobile Heavy Equipment Mechanics, Except Engines* | 2.34 | 225 | 18.86 | 13.36 | 3 | Yes |
| 151071 | HSHW | Network and Computer Systems Administrators | 3.25 | 780 | 32.88 | 21.78 | 4 | |
| 151081 | HSHW | Network Systems and Data Communications Analysts | 5.27 | 1,650 | 30.52 | 19.39 | 3 | |
| 472073 | | Operating Engineers/Construction Equipment Operators* | 1.82 | 787 | 16.60 | 12.43 | 3 | |
| 472141 | | Painters, Construction and Maintenance* | 2.79 | 1,469 | 15.27 | 11.24 | 3 | |
| 232011 | HSHW | Paralegals and Legal Assistants | 3.89 | 1,065 | 21.67 | 14.85 | 3 | |
| 132052 | HSHW | Personal Financial Advisors | 3.16 | 839 | 33.21 | 16.62 | 4 | |
| 372021 | | Pest Control Workers | 1.81 | 447 | 14.67 | 10.19 | 3 | |
| 312021 | HSHW | Physical Therapist Assistants | 3.19 | 172 | 24.29 | 17.72 | 4 | |

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| SOC Code† | HSHW†† | Occupational Title† | Annual | Annual | 2008 Hourly Wage | | FLDOE | New |
|-----------|--------|---------------------------------------------------------------|---------|--------|------------------|-------|-------|-----|
| | | | Percent | | Openings | Mean | | |
| 472151 | | Pipelayers* | 1.76 | 221 | 15.17 | 11.74 | 3 | Yes |
| 472161 | | Plasterers and Stucco Masons* | 2.25 | 257 | 18.03 | 12.99 | 3 | Yes |
| 472152 | | Plumbers, Pipefitters, and Steamfitters* | 1.99 | 1,137 | 17.94 | 12.79 | 3 | |
| 333051 | HSHW | Police and Sheriff's Patrol Officers | 1.25 | 1,465 | 24.55 | 17.37 | 3 | |
| 119141 | HSHW | Property, Real Estate & Community Association Managers* | 1.25 | 552 | 30.46 | 15.82 | 4 | |
| 273031 | HSHW | Public Relations Specialists | 2.04 | 547 | 26.13 | 16.15 | 4 | |
| 131023 | HSHW | Purchasing Agents, Except Farm Products & Trade | 0.96 | 467 | 25.39 | 16.28 | 4 | |
| 292034 | HSHW | Radiologic Technologists and Technicians | 2.09 | 466 | 24.67 | 18.49 | 3 | |
| 419021 | HSHW | Real Estate Brokers* | 1.66 | 445 | 41.73 | 14.95 | 3 | Yes |
| 419022 | | Real Estate Sales Agents* | 1.20 | 1,821 | 23.74 | 10.58 | 3 | |
| 291111 | HSHW | Registered Nurses | 2.66 | 6,613 | 29.52 | 21.65 | 4 | |
| 291126 | HSHW | Respiratory Therapists | 2.77 | 282 | 23.43 | 18.56 | 4 | |
| 472181 | | Roofers* | 1.96 | 650 | 15.68 | 11.52 | 3 | |
| 112022 | HSHW | Sales Managers | 1.88 | 697 | 59.49 | 30.75 | 4 | |
| 414011 | HSHW | Sales Representatives, Wholesale & Mfg, Tech. & Sci. Products | 2.01 | 1,259 | 33.78 | 17.29 | 3 | |
| 414012 | HSHW | Sales Representatives, Wholesale and Manufacturing, Other | 2.06 | 4,261 | 28.04 | 13.36 | 3 | |
| 413031 | HSHW | Securities, and Financial Services Sales Agents | 1.50 | 809 | 39.44 | 16.86 | 4 | |
| 492098 | | Security and Fire Alarm Systems Installers* | 2.63 | 294 | 16.18 | 11.74 | 3 | |
| 253021 | | Self-Enrichment Education Teachers | 2.74 | 534 | 18.65 | 10.62 | 3 | Yes |
| 472211 | | Sheet Metal Workers* | 1.81 | 375 | 17.04 | 11.90 | 3 | |
| 211011 | HSHW | Substance Abuse and Behavioral Disorder Counselors | 2.97 | 199 | 19.49 | 12.69 | 3 | |
| 292055 | | Surgical Technologists | 2.91 | 327 | 18.04 | 13.83 | 3 | |
| 173031 | | Surveying and Mapping Technicians* | 3.40 | 569 | 16.32 | 11.01 | 3 | |
| 171022 | HSHW | Surveyors* | 3.67 | 278 | 26.23 | 15.59 | 4 | |
| 259041 | | Teacher Assistants | 1.78 | 1,579 | 13.94 | 10.51 | 3 | |
| 472044 | | Tile and Marble Setters* | 3.42 | 308 | 16.52 | 10.36 | 3 | Yes |
| 232093 | HSHW | Title Examiners, Abstractors, and Searchers* | 1.67 | 165 | 19.89 | 12.85 | 3 | Yes |
| 533032 | | Truck Drivers, Heavy and Tractor-Trailer | 1.32 | 2,578 | 16.91 | 11.73 | 3 | |
| 251194 | HSHW | Vocational Education Teachers, Postsecondary | 3.10 | 339 | 25.62 | 15.68 | 3 | |
| 514121 | | Welders, Cutters, Solderers, and Brazers | 1.64 | 529 | 16.18 | 11.43 | 3 | |

†SOC Code and Occupational Title refer to Standard Occupational Classification codes and titles.

††HSHW = High Skill/High Wage.

*These occupations are associated with industries currently in decline and may have an oversupply of trained workers.



Proposed Areas of Programmatic Strategic Emphasis

Richard P. Stevens

August 28, 2008

2005 – 2013 SUS Strategic Plan

Current Areas of Programmatic Strategic Emphasis

- **Critical Needs: Education**
- **Critical Needs: Health Professions**
- **Economic Development: Emerging Technologies**
 - Mechanical science and manufacturing
 - Natural science and technology
 - Medical science and technology
 - Computer science and technology
 - Design and construction
 - Electronic media and simulation
- **Economic Development: High-Wage/
High-Demand**



Methodology

Reviewed Key Council Reports and Workforce Data

- **Enterprise Florida, Inc.**
 - Industry Sectors
 - Roadmap to Florida's Future
- **Council of 100, 2006 Report**
- **Chamber of Commerce Cornerstone Report**
- **Workforce Florida, Inc., Targeted Industries**
- **Florida High-Tech Corridor**
- **Agency for Workforce Innovation and U.S. D.O.L.**
- **Florida Hospital Association and FL. D.O.H.**
- **State Board of Education, Critical Teachers**
- **FETPIP Data Tracking of SUS Graduates**



Methodology

Merged Key Council Areas of Interest and Emphasis

- **Business & Global Economics**
 - Financial Services
 - Professional Services
 - Hospitality
- **Sciences**
 - Life Sciences
 - Biotechnology Mfg.
 - Scientific & Technical Services
- **Medical Services**
 - Healthcare
 - Social Services
- **Education**
- **Technology**
 - Research and Development
 - Emerging Technologies
- **Sustainable Development**
 - Energy
 - Environment
- **Information Technology**
- **Disaster Management**
 - Homeland Security
 - Hurricane Preparedness
- **Engineering**
 - Aerospace/Aviation
 - Manufacturing
 - Construction
- **Arts/Communication/Interactive Entertainment**



Proposed

Areas of Programmatic Strategic Emphasis

- **Critical Needs: Education** (no change)
- **Critical Needs: Health Professions** (no change)
- **Critical Needs: Security and Emergency Services** (new)
- **Economic Development: Globalization** (new)
- **Economic Development: Regional Workforce Demand** (revised high-wage/high-demand)
- **Science, Technology, Engineering, and Math (STEM)** (replaces emerging technologies)



Purpose

Areas of Programmatic Strategic Emphasis

- Alignment of SUS goals with state economic and workforce needs through targeted degree programs.
- Key component of University Compact with BOG.
- Framework for SUS collaboration.
- Framework for collaboration with other education sectors.
- Framework for collaborative research initiatives.
- Framework for establishing non-degree programs such as professional certificates, study abroad, critical language institutes, etc.



The University Compact Process

- An on-going, iterative, and collaborative process of communication.
- Includes a multi-year, reciprocal agreement between an institution and the System.
- Helps create a shared vision and plan.
- Improves alignment of broad system goals and the directions, investments, and actions of institutions.
- Encourages cooperation, negotiation, and information sharing.
- Integrates planning, budgeting, and assessment.

