

LABOR MARKET ASSESSMENT OF LEE COUNTY, FLORIDA

Prepared for:

THE HORIZON COUNCIL

November 2007

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BACKGROUND

This labor market assessment is the product of a contract between the Wadley-Donovan Group (WDG) and the Horizon Council of Lee County, Florida. A companion report titled *Education and Training Audit: Lee County, Florida* was submitted separately. This assessment uses primary data obtained through WDG-conducted surveys of labor-related issues among employers and households in the region; interviews with representative employers, educators, local government and elected officials, staffing services, and residential and commercial developers; and a review of key statistical and other secondary-source information. The employer survey gathered information from area employers on the availability and quality of labor, the quality of area training resources, the cost of labor, retiring residents within the workforce, and future labor demands. The household survey results allowed us to quantify and profile the area's regular labor force and its hidden labor reserve. The household survey was produced in collaboration with Younger Associates (YA), based in Jackson, TN, which specializes in business-to-business and business-to-consumer surveys.

The findings presented herein are those of WDG/YA only. We have examined the region from a corporate perspective and our own knowledge of labor markets across the U.S.

This authorized study required independent research to review the labor and educational/training resources of Lee County from the perspective of a locationally active company. For this study, WDG and YA:

- Interviewed approximately 40 representative employers, educators, trainers, and government officials throughout the county;
- Prepared maps depicting the geographic concentration of key demographic variables in 30-minute commute zones centered around three separate employment centers in the region. The 30-minute commute zone was used because WDG research from survey data showed that over 60% of the workforce commutes 30 minutes or less. These maps are presented in Appendix A. The three employment centers are located at:
 - U.S. 41 and Martin Luther King Boulevard
 - Santa Barbara Boulevard and Pine Island Road
 - Alico Road and I-75
- Surveyed employers across the region with 20 or more employees (except for retail and government, for which a minimum threshold of 100 employees was used);
 - WDG distributed 1,056 surveys to employers in all business sectors in Lee County in August 2007. The mailing list was developed through InfoUSA, a private vendor, and modified with local input. 197 surveys were returned, for an 18.7% response rate. The rate of return yielded a representative sample that allowed WDG to provide observations on the condition of the region's labor market based on employer experiences.
- Surveyed in the summer of 2007 a random stratified sample of residents in the age range of 18 to 74 to gather information on employment status, training needs, and income and education levels. A total of 678 surveys were conducted. The survey included a statistically valid, stratified sample of residents of Lee County. To achieve the required response rate for statistical validity and to assure a properly statistically stratified sample of all socio-economic and demographic segments of the population, YA conducted the

survey using face-to-face interviews at popular retail centers in the county. The survey results have a +/- 5% margin of error and a reliability of 95%.

- Prepared and reviewed statistical data on key workforce factors for each of the three commute zones, Lee County, Florida, and the U.S. Research sources include, but are not limited to: the Lee County Economic Development Office; the State of Florida; the U.S. Bureau of the Census; the U.S. Bureau of Labor Statistics; and the U.S. Departments of Education and Commerce. TETRAD, Inc.—a leading demographic data vendor of Claritas data—was used for 2007 and 2012 demographic, occupational, and related data estimates and projections. WDG used 2005 American Community Survey data (U.S. Census) to supplement the 2007 Claritas data where currently available. Exhibits containing the gathered data are presented in Appendix D.

A study of this nature can do no more than describe local conditions. The actual impact of these conditions for any given organizational activity will vary, reflecting the different characteristics and structure of each organization. The consulting team's principal findings and conclusions are recapped in the Executive Summary, followed by a presentation of our findings on key labor-market factors, business climate and operating environment, and quality of life.

The Wadley-Donovan Group is the nation's oldest independent management consulting firm that specializes in location consulting and economic development. Its corporate clients include many of the world's leading companies. WDG's economic development practice provides expertise to workforce and economic development agencies and utilities in sales and marketing, strategic planning, database development, overall product development, and assessment. Clients have included Eastern Idaho; Albuquerque; greater Memphis, Huntsville, Knoxville, Tampa; Tulsa; Rochester, NY; Buffalo, NY; Boise, El Paso, Great Falls, Phoenix, Asheville, NC; Conway, AR; Richmond, VA; Tallahassee; Tunica County, MS; FL; Charlotte County, FL; Jackson, TN; and the states of Delaware, Iowa, Kansas, Kentucky, New Jersey, Oregon, Wyoming, Wisconsin, and Maryland.

EXECUTIVE SUMMARY

Summary of Findings

Lee County is a very attractive, sophisticated, and economically and culturally diverse area with a population of 579,463. The county is located on the southwest coast of Florida, approximately 125 miles south of Tampa and 115 miles west of Fort Lauderdale. The Cities of Cape Coral and Fort Myers combined contain 209,219 residents, and make up the largest population center in the area, accounting for 36% of Lee County's population.

Interstate highway access to the region is provided by I-75, which extends from Fort Lauderdale (where it joins with I-95) across the bottom of the state and continues along the western coast, through the central and northern portions of the state, and into southern Georgia. State and local roadways converge in the Fort Myers area, providing access to a multi-county labor shed. Destinations in Florida and in the southern halves of Alabama and Georgia are reachable in under a ten-hour drive.

Direct air service is provided between the Southwest Florida International Airport and 39 non-stop destinations (36 domestic and three international). The *Official Airline Guide* indicates there are five or more daily flights available to Atlanta, Chicago, New York/Newark, Detroit, and Washington, DC. The airport is located southeast of Fort Myers and is easily accessed from multiple I-75 exits and local roadways.

The county's most dominant industry sectors (as measured by current employment) include retail trade, construction, healthcare and social assistance, accommodation and food services, and other services. The top five expanding industry sectors in Lee County (as measured by employment growth) are educational services, construction, transportation and warehousing, finance and insurance, and healthcare and social assistance. The region hosts a wide variety of private- and public-sector employers, including: Lee County School District, Lee Memorial Health Systems, Publix Super Markets, Lee County Administration, Wal-Mart Corporation, City of Cape Coral, Lee County Sheriff's Office, Bonita Bay Group, U.S. Postal Service, Chico's FAS, Inc., Florida Gulf Coast University, City of Fort Myers, WCI Communities, Inc., EMBARQ, Shell Point Retirement Community, and LXR Luxury Resorts, among many others.

Between 2000 and 2007, Lee County expanded in population by 31.4% (138,575 residents)—dramatic growth compared to the state (14.9%) and nation (7.0%). Claritas estimates indicate growth of 17.2% between 2007 and 2012, reflecting a net population increase of 99,495 residents.

The county's average annual unemployment rate dropped from 3.7% to 2.9% between 2000 and 2006. Unemployment rates in both 2000 and 2006 were below state and national averages. In September 2007, the unemployment rate climbed to 5.2%, which was well above the state and national averages (4.3% and 4.5%, respectively). Lee County's unemployment rate has steadily increased from 3.3% in May 2007 to 5.2% in September 2007, due, in large part, to downturns in the number of construction jobs throughout the area. The county's labor participation rate in 2007 was 54.0%, below the Florida average (58.6%) and considerably below the national average (64.1%).

Employers surveyed and interviewed by WDG in August 2007 reported a tight labor-recruiting environment affecting a variety of occupations, despite the growing unemployment rate. Employers indicated a tight labor market, particularly among health care, hospitality, information technology, supervisory, and management occupations. Downturns in the region's construction industry have abated the

previously high demand for a variety of occupations in that sector. Nevertheless, the supply of workers in manufacturing and skilled assembly occupations remains tight.

The 58 representative, benchmark occupations for which surveyed and interviewed employers provided sufficient response were divided into four availability categories as presented below (employers rated the availability of occupations on a 1-to-5 scale where 5=plentiful and 1=unavailable). As shown in Table 1, only 12% of the surveyed occupations are available at satisfactory or better levels:

TABLE 1: Availability of Selected Occupations as Reported by Area Employers
Source: WDG Employer Survey, August 2007

SATISFACTORY OR BETTER Median Rating: 3.0 or higher Average Rating: 3.0 or higher	BORDERLINE-TO-SOMEWHAT-UNSATISFACTORY Median Rating: 2.5 to 3.0 Average: Rating 2.3 to 2.9	TIGHT-TO-VERY TIGHT Median Rating: 2.0 to 2.5 Average: Rating 1.8 to 2.4	UNAVAILABLE Median Rating: 1.0 to 1.5 Average Rating: 1.1 to 2.1	
GENERAL BUSINESS AND OFFICE SUPPORT				
Accounting clerks/bookkeepers Admin. Assistants Call center agents/representatives Customer service representatives Office clerks	Claims processing clerks Clerical (advanced computer skills)			
MANAGEMENT AND SUPERVISORY				
	Construction supervisors General & operations managers Experienced management Production supervisors	Management trainees Purchasing agents		
TECHNICAL AND PROFESSIONAL				
Accountants/auditors		CAD drafters Engineering technicians Engineers Financial analysts/advisors Sales representatives Technicians	Medical/clinical lab technicians Physical therapists Physicians Respiratory therapists Lab technicians Medical assistants Medical records technicians Medical secretaries	Licensed practical nurses Registered nurses Pharmacy technicians Radiological technicians Scientists (general) Elementary teachers Secondary teachers
PRODUCTION, MAINTENANCE AND DISTRIBUTION				
	Building/construction workers Computer support/technicians	Bench assemblers Electric/electronic repairers Machine operators Skilled machine trades Maintenance mechanics Shipping & receiving	CNC machine operators Inspectors/testers/sorters Machinists/manufacturing technicians Welders	
COMPUTER AND INFORMATION SYSTEMS				
		Database administration Network systems administration Network technicians Programmers/analysts	Computer operators Systems analysts Webmasters Computer security specialists Computer software engineers Internet development specialists	
OTHER				
Heavy equipment operators				
Total: 7	8	18	25	
% of Total: 12%	14%	31%	43%	

As another measure of the area's labor market, WDG assessed the balance that exists between employer demand for and availability of the 58 benchmark occupations, based on employer survey results. This measure differs from a straight assessment of general availability because it shows the level of demand for those occupations versus their availability. It shows, for example, whether some of the low availability occupations are in high enough demand to warrant immediate training, recruiting, or other remedial actions.

Using this measure, 22 occupations were identified for which demand significantly exceeds availability, including licensed practical nurses, registered nurses, elementary school teachers, and secondary school teachers. Meanwhile, there is an unfavorable labor-availability imbalance—with a smaller gap—for experienced management, medical assistants, physical therapists, radiological technologists, respiratory therapists, sales representatives, CNC machine operators, electrical and electronic repairers, inspectors/testers/sorters, and maintenance mechanics. A modest availability/demand imbalance was reported for accounting clerks/bookkeepers, call center agents/representatives, clerical workers with advanced computer skills, customer service representatives, lab technicians, welders, computer software engineers, and systems analysts.

In one year, the number of occupations for which demand will especially exceed supply will expand to 34. Those with the greatest gap between demand and availability will be medical assistants, licensed practical nurses, registered nurses, sales representatives, elementary school teachers, secondary school teachers, and electric and electronic repairers. Responding employers report the need for call center agents/representatives (379), registered nurses (292), elementary-school teachers (203), secondary-school teachers (203), customer service representatives (171), licensed practical nurses (154), and computer support specialists/technicians (119).

In addition to these labor availability and gap issues, Lee County faces the following other workforce challenges:

- **Lee County has an older workforce than the state and nation.** The median age in Lee County in 2007 is 43.5 years, compared to 39.8 years in Florida and 36.6 years in the U.S. This higher median age is attributable to a high percentage of residents 55 years of age and older (35.1% in Lee County compared to the U.S. average of 23.3%).
- **Difficulties exist in recruiting professional and other talent from outside the region.** Employers report that job opportunities for “trailing” spouses are limited, which serves as a recruiting deterrent for many job candidates. There are reportedly very few professional jobs available for trailing spouses outside of the medical and educational fields. Additionally, the availability, quality, and cost of housing (including the cost of homeowners insurance and property taxes) are considered deterrents to job acceptance) for many relocatees.
- **The workforce has slightly unsatisfactory basic skills:** Employers report slightly unsatisfactory basic skill levels among job applicants, including applicant skills in overall basic skills, reading comprehension, math, and thinking and judgment/problem solving. Scores are nearly satisfactory for team and cooperative skills.
- **The county's residents have a lower-than-average educational attainment at key levels:** The county has lower-than-average ratios of residents holding associate's, bachelor's, and graduate degrees, and the concentration of residents with 16 or more years of education lags behind the nation.
- **There is a wage and household income discrepancy in the county.** Median household income in the county is about 7% higher than the state median and about 1% lower than the national median, but average individual employee earnings are 1.7% below the state average and 14.2% below the national average. This discrepancy may be attributable, in part, to a high proportion of retired

county residents living on unearned income such as investments and pensions, which give these residents and households higher incomes than those enjoyed by working residents.

- **The county's employment in key, knowledge-based, occupational groups lags behind national averages.** There are low concentrations of workers in the following occupations: architecture/engineering, arts/design/entertainment/sports/media, computer and mathematical, education/training/library, financial specialists, life/physical/social science, and management. Such lower than average ratios can adversely affect the ability of the county to attract more knowledge-based and technology-focused industries, as these industries look for better concentrations in these occupation sets.
- **The region's employment increased by 29.4% between 2000 and 2006, while unemployment decreased to 2.9%, resulting in tighter labor market conditions.** While employment growth and reduced unemployment are favorable for the region's economy, tighter unfavorable labor market conditions have emerged. WDG's Labor Stress Index shows labor tightness in the Cape Coral-Fort Myers MSA that is more favorable compared to several selected communities in Florida and adjoining states, but the index reveals that conditions are tighter in Lee County than in Miami, Orlando, and Tampa. In September 2007, however, Lee County's unemployment rate increased to 5.2%, which is well above the state and national averages (4.3% and 4.5%, respectively). Much of this increase is due to a downturn in the construction sector. However, if higher unemployment spreads to other sectors, an overall softening of the county's labor market would ease recruiting difficulties,
- **The Cape Coral-Fort Myers MSA scored at parity with the national average on the Boomer Retirement Impact Index, constructed by WDG to measure the impact of retiring Baby Boomers on regional workforces across the nation.** Nevertheless, the impact of the Boomer retirees on the labor market has yet to be experienced in the region, but it is coming relatively soon. Data from the employer survey indicates that 7.3% (on average) of currently employed workers are presently eligible for retirement, or will be retiring over the next five years. Extrapolated to the entire workforce, the data shows there will be replacement need for 20,070 workers over the next five years. Employers report that, of the 145 occupations held by employees eligible to retire now or over the next five years, they are not confident or are unsure they will be able to fill vacancies in 60 of these occupations.
- **Employers tend to rely on traditional recruiting techniques to fill job vacancies.** Employers may need to expand their recruiting efforts to increase candidate selectivity.
- **Employers infrequently use area high schools and the post-secondary institutions in or near Lee County for training programs, apprenticeships, co-ops, and other programs.** Of the institutions that are used, employers report minimal involvement with Florida Gulf Coast University, Lee County Technical Centers, Edison College, and area high schools.
- **Employers responding to WDG's survey with knowledge of the graduates from and programs at the area's educational institutions report borderline-satisfactory quality ratings.** Employers report the need to bolster programs to improve the basic skills of their students in work ethic, communication/speaking, job interview skills, job preparedness, critical thinking, life skills, reading/writing, and computer/software skills.
- **Graduation rates at all of the local secondary educational institutions need to increase.** High school graduation rates for the 2004-2005 school year range from 26.0% (Richard Millburn Academy) to 78.2% (Fort Myers High School). More intervention, focused tutoring, remedial skills training, and financial assistance options may be necessary to reduce attrition rates.

- **Of the 14 public high schools in Lee County, none has met the Average Yearly Progress requirements under the No-Child-Left-Behind Act.** For the 2006-2007 school year, 12 schools require the preparation of school improvement plans, and two (Richard Millburn Academy and Lehigh Senior High School) require additional assistance and intervention measures.
- **Florida workers' compensation insurance rates are higher than the U.S. average.** According to the annual analysis of worker's compensation costs by Actuarial & Technical Solutions of Ronkonkoma, New York, Florida costs were 14.1% higher than the national average. The rates, though, are improving. In 2008, they will drop by 18.4%. This decrease follows a trend. The cumulative overall statewide average rate will show a decline of 50% between 2003 and 2008.
- **23.8% of employers responding to the survey report that their training needs are not being met locally.** Satisfactory local skills training for many employers is not currently available for the following occupations; engineering (general and advanced); advanced CADD training; mechanics (aircraft and diesel); specialized banking skills; CNC programming; computer skills (machine and microelectronic); electrical estimating; embroidery design; heavy equipment operators; English as a second language; hospital-based coding; human resource management; industrial electric; insurance sales; MBA programs; media buying/planning; medical lab technicians/supervisor; sign fabrication; OSHA training; pharmacy; public relations; retail management; legal secretary; press operations; trade skills (carpentry, drywall, plaster); and ultrasound.
- **Property and violent crime rates in Lee County are lower than Florida's average rates, but exceed national averages.** Crime rates as reported in 2003 (latest data available) were higher than the national and state averages for property and violent crime.
- **Employers report less-than-satisfactory ratings regarding the availability of affordable homes and rentals and the availability of childcare services.** Public education (K-12) received a satisfactory rating (median and average scores of 3.0).
- **Housing costs in Lee County are higher than state and national averages.** The 2007 estimated median home value in Lee County is \$238,863—23% higher than the Florida average (\$194,467) and 38% higher than the national average (\$172,914). There is a variety of housing available at multiple price points; however, just 11.3% of available homes were priced below \$150,000, and only 32% of the available homes are priced below \$200,000. The lower inventory of housing stock in the county limits the selection for working residents, many of whom earn salaries and wages that are well below the national average.
- **The cost-of-living index for Lee County is slightly higher than the Florida average, and is also higher than the national norm.** The composite ERI cost of living for Lee County is 113.4, comparing higher than the state and nation at 107.3 and 100, respectively.

Coupled with these challenges are the following key assets.

- **Within a 30-minute commute zone of downtown Fort Myers (intersection of U.S. 41 and Martin Luther King Boulevard) resides a population base of 504,003 residents.** This population base is projected to expand by 17.1% between 2007 and 2012. The 30-minute commute zones from the southern Fort Myers location (intersection of Alico Road and I-75) and the Cape Coral location (Intersection of Santa Barbara Boulevard and Pine Island Road) capture population bases of 467,841 and 425,096, respectively.
- **Despite the area's older workforce profile, its concentration of young and working-age residents is expected to increase more rapidly than the nation's.** This growth is an advantage for future employment growth and workforce sustainability.

- **Lee County contains hidden labor supplies.** WDG's extrapolations of household survey data reveal a potential hidden labor supply of approximately 140,915 residents, including a mix of not-employed residents interested in employment (93,351), underemployed residents (43,328), and recent college and technical school graduates (4,236). Notably, 82.3% of the not-employed residents interested in working and 45.5% of the underemployed residents desire job training to upgrade their skills and career potentials. Additional characteristics of not-employed and underemployed residents include:
 - 67.6% of not-employed workers desire full-time employment;
 - 88% of the not-employed interested in working have at least a high school diploma, 23.1% have some college education but no degree, and 21.8% have a bachelor's degree or higher;
 - 40.2% of the not-employed interested in working are between the ages of 45 and 64, and 22.8% are between the ages of 65 and 74, indicating a potential base of mature employees.
 - 61.8% of the not-employed interested in working do not have a limitation to entering the workforce;
 - 95.8% of the underemployed have at least a high school diploma, and 29.6% have a bachelor's degree or higher;
 - 62.9% of the underemployed are between the ages of 35 and 54, and 14.3% are between the ages of 55 and 64; only 17.2% are between the ages of 18-34.
 - The not-employed and underemployed are willing, on average, to commute longer durations than the prevailing patterns of employed residents.
- **The percentage of working age residents not participating in the workforce is high.** 46% of the working-age county residents are not in the workforce, compared to a state average of 41.4% and a national average of 35.9%. Much but not all of this high number can be attributed to the county's high number of older residents.
- **A competitively paying office operation in the county could fill up to 1,624 positions.** Even with the county's low unemployment rate, WDG forecasts an employer located in downtown Ft. Myers could fill 1,624 positions under current conditions. Wages would have to be above the county average (currently the average annual starting rate for accounting clerks and bookkeepers is \$30,735, administrative assistants, \$28,466, call center agents, \$23,089, and office clerks, \$22,723). Benefits also would have to be strong, and the working conditions attractive.
- **A competitively paying manufacturing or distribution facility could fill up to 1,571 positions.** Even with the county's low unemployment rate, WDG forecasts an employer located in downtown Ft. Meyers could fill 1,571 positions under current conditions. Wages would have to be above the county average (currently the average annual starting rate for electrical and electronic repairers is \$33,713, for maintenance mechanics it is \$32,062, and for shipping and receiving it is \$21,795). Benefits also would have to be strong, and the working conditions good.
- **Where data is available, the surveyed residents would like training or have experience in occupational fields in which employers report an imbalance between supply and demand.** Occupations where training is desired include: registered nurses; elementary-school teachers; secondary-school teachers; licensed practical nurses; sales representatives; and computer support specialists/techs.

- **The proportion of residents with a high school diploma is higher than state and national averages.** In 2007, 83.0% of Lee County's population had at least a high school diploma, which is higher than the state and national averages (80.3% and 80.6%, respectively). The concentration of residents with 12 to 15 years of education is higher than the national average; however, this is attributable to a higher concentration of residents earning the high school diploma only. Proportions of residents completing one to three years of college are slightly higher than state and national norms.
- **The Lee County School District is proactively engaged in improving the quality of public education.** Since 2004, Lee County opened three Comprehensive High Schools (e.g., Ida S. Baker High School, South Fort Myers High School, and East Lee County High School) to provide Technical and Career Education Academies in a variety of subject areas, in addition to the traditional academic and extracurricular program areas. Notably, the Ford Foundation designated Lee County and the Lee County School District as a Career Academy Innovation Community, and it will provide funding, technical support, and mentoring assistance to the district to increase the number of students learning in successful career academies.
- **Lee County has a base of post-secondary educational institutions that can provide part-time employees, interns, and graduates to area employers, and this supply is growing.** The county's post-secondary educational institutions enroll approximately 21,915 students and graduate 4,164 annually.
 - The **Edison College** main campus (Lee Campus) is located in Fort Myers. Other campuses include Collier Campus in Naples; Charlotte Campus in Punta Gorda; and Hendry/Glades Services in LaBelle. In 2005, the institution enrolled 10,653 students and conferred approximately 1,313 degrees. Edison College programs include: Associate in Arts degree (AA); Associate of Science degree (AS) in 20 program areas; Certificate programs in 12 program areas; bachelor's degrees in three program areas; Continuing Education (C.E.) in 15 program areas; and three college programs for high school students. Edison College program areas with the highest number of annual graduates are liberal arts and sciences/liberal studies (647), registered nursing (105), criminal justice/law enforcement administration (25), business administration and management (20), and emergency medical technology/technician (17). The Edison University Center, an alliance between Edison College and regionally accredited colleges and universities, offers unique opportunities for Edison graduates to earn bachelor's degrees. Baccalaureate Program Partnerships provide bachelor's degree programs in 25 program areas.
 - **Southwest Florida College's Fort Myers campus** enrolled 1,821 students and graduated approximately 832 students in 2005. Associate degrees, diplomas, or certificates are offered in the following program areas: accounting technology; computer aided drafting and design; computer programming and database management; criminal justice; early childhood education; graphic design; hospitality management; interior design and decorating; management and marketing; massage therapy; medical administration; medical assisting; medical billing and coding; network engineering and administration; paralegal studies; surgical technician; technical administration; and web design and development. Bachelor of Science degrees include criminal justice, early childhood education, elementary education, interior design and decorating, and management; however, Integrated Postsecondary Education Data System (IPEDS), the data collection program for the National Center for Education Statistics, indicates that, as of 2006, there were no graduates from these program areas. General education courses and cooperative education (formal education along with work experience) are also provided. Program areas with the highest number of annual graduates are graphic design, commercial art and illustration (43),

computer and information sciences (40), business administration and management (38), medical records administration (38), medical assistant (31), accounting technician (22), and criminal justice studies (17).

- **The Lee County High Tech Center Central (Ft. Myers) and the Lee County High Tech Center North (Cape Coral) provide career/technical programs for high school and adult students 16 years of age or older.** The two facilities provide services for students in a five-county area, including Lee, Charlotte, Collier, Hendry, and Glades Counties. The facilities offer over 30 different training programs in a variety of subject areas. Among the programs offered are academic services, automotive, business education, commercial foods, cosmetology, early childhood education, electronics, health sciences, industrial technology, public services, and vocational prep. Apprenticeship programs are provided in air conditioning, electrical, fire sprinkler, pipefitting, and plumbing. The top ten programs with the highest number of certificate earners include: practical nurse (45); surgical/operating room technician (21); cosmetic services (21); business administration and management (18); heating, air conditioning, and refrigeration mechanic and repairer (14); administrative and secretarial services (13); culinary arts and related services (10); accounting (9); electrician (8); and health and medical administrative services (8).
- **Florida Gulf Coast University** is the largest post-secondary institution in Lee County. The university had 7,249 enrollees in 2005, and it graduates approximately 1,212 students annually. Florida Gulf Coast University is part of the Florida State University System and is responsible for providing programs and services to a five-county region (e.g., Lee, Charlotte, Collier, Glades, and Hendry Counties). The University contains six distinct colleges, including: College of Arts and Sciences; College of Education; College of Health Professions; College of Professional Studies; Lutgert College of Business; and U.A. Whitaker School of Engineering. Presently offered are 47 undergraduate majors and 23 graduate degrees and programs. Non-degree and continuing education programs are also provided. Florida Gulf Coast University provides distance learning and on-line courses with both degree- and non-degree-oriented curriculum. The top ten programs with the highest number of bachelor's-degree earners include: liberal arts and sciences/liberal studies (149); elementary teacher education (80); registered nursing (69); criminal justice (62); business administration and management (44); management information systems and business data processing (36); accounting (29); public administration and services (27); finance (22); and medical technology (10). The top ten master's degree programs with the highest number of graduates include: business administration and management (48); education administration and supervision (33); registered nursing (18); accounting (16); public administration (14); special education (12); curriculum and instruction (11); counselor education/counseling and guidance services (10); social work (10); and physical therapy (9).
- **Hodges University** (formerly International College) offers associate's, bachelor's, and master's degree programs and other non-degree courses of study. Hodges University is an independent, not-for-profit institution with main campuses located in Fort Myers and Naples, and additional learning sites at Cape Coral and in Charlotte, Manatee, Pasco, and Hernando Counties. On-line courses also are offered. In 2005, Hodges University enrolled 1,673 students and conferred approximately 575 degrees. The Fort Myers main campus is the largest—with 1,036 enrollees—followed by the Naples campus with 735 enrollees. Hodges University contains four distinct schools: School of Allied Health; Kenneth Oscar Johnson School of Business; School of Professional Studies; and School of Technology. Offered are 12 associate's degrees, 11 bachelor's degrees, and seven master's degrees. Degrees are offered in 17 program areas, including: accounting; applied psychology;

business administration; computer information technology; criminal justice; design and drafting; health administration; health information technology; health studies; information system management; interdisciplinary studies; legal studies; paralegal studies; management; medical assisting; professional studies; and public administration. Bachelor's degree program areas with more than ten graduates in 2005 are business administration, management, and operations (155), multi-disciplinary studies (54), criminal justice/safety studies (29), business administration and management (26), accounting (21), information technology (19), and computer/information tech services administration and management (16). Master's degree programs with more than ten graduates include: business administration, management and operations (40); business administration and management (25); criminal justice/law enforcement administration (12); and computer/information tech services administration and management (11).

- **Employers report satisfactory work ethic and productivity among their current employees.** Work ethic, productivity, productivity compared to company facilities elsewhere, and punctuality receive satisfactory ratings among surveyed employers. These employers assigned slightly-better-than-satisfactory ratings for willingness to work overtime and overall employer/employee relations. These ratings, while satisfactory or slightly better than satisfactory, still show considerable room for improvement.
- **Employee turnover rates as reported by surveyed employers are favorable.** Turnover rates for new hires are typically 10% or less, and were reduced to 5% or less after the first year of employment. These turnover rates are very favorable relative to other recently examined locations.
- **Labor costs for entry-level and experienced workers in the region are below state and national averages.** The wages and salaries for workers in the region are 1.7% below the state average and 14.2% lower than the national average. Relative to other WDG-studied areas, earnings for entry-level and experienced workers are below the national average. However, there is an imbalance in the region caused by below-average wages and higher-than-average housing and living costs.
- **The county has a cooperative labor relations environment.** Interviewed employers report that workers are not predisposed to union representation. There have been no reported National Labor Relations Board elections won by unions since June 2002. Of the nine union elections held between 2000 and June 2002, six were lost by the unions. Notably, the Teamsters and United Food and Commercial Workers are present in the region, and firms wishing to retain a non-union labor environment must remain aware of the local and regional labor climate.
- **The labor-related operating environment in Florida is favorable for business.** Florida is a right-to-work state and has laws concerning employment-at-will. There are no current statewide restrictions stronger than federal ones regarding plant closings, ADA legislation, EEO standards, sexual harassment law, or mandated parental leave. Employers report no restrictions on pre-employment drug testing or testing for cause.
- **Slightly-above-satisfactory quality-of-life ratings were reported for private education (K-12) and healthcare services among surveyed employers.** Less-than-satisfactory ratings, however, were reported for the availability of affordable homes and rentals and the availability of childcare services. Lee County hosts six hospitals containing a total of 1,700 beds, and the quantity of beds per capita exceeds state and national rates.

Conclusions

Lee County is an attractive area along Florida's Gulf Coast containing a variety of living environments pleasing to younger workers and retirees alike. The natural environment offers a variety of active recreational opportunities, and cultural amenities are commensurate with the area's population size.

The area has grown dramatically. Since 1990, the population of Lee county increased by nearly 73%, from 335,113 to 579,463 residents. Lee County provides a pleasant living environment along with strong healthcare services, and is attractive to retirees. Claritas estimates for 2007 indicate that 22.9% of the county's residents are 65 years of age or older, and this is projected to grow to 24.4% by 2012.

The area, however, has become a victim of its own success. The popularity of the area has driven up housing costs (both purchase and rental), and increased the cost of living to levels above the national average, forcing low- and moderate-wage earners to look outside coastal areas of the county for affordable housing. The county's higher housing and living costs (including increased insurance costs and higher property taxes for new-home buyers) and limited work opportunities for relocating spouses/partners have made it difficult for employers to attract workers to Lee County from outside the area and the state. They also have financially squeezed many workers living in the county for whom earnings have not kept pace with the cost of living.

Growth also has created a tight labor market. In 2006, the unemployment rate had fallen to 2.9%. Throughout most of 2007, the unemployment rate has risen because of a downturn in the area's construction industry. This increase in unemployment has not made employee recruiting easier for employers in other sectors, however. These employers report difficulties filling many of their job openings. Of the 58 occupations included in WDG's survey, employers report borderline-or-worse recruiting conditions for 51, while 25 occupations are very difficult to fill, or are effectively unavailable.

Other workforce-related challenges include a relatively large retirement-age population that limits the supply of young employees, an impending high impact of near- and long-term Baby-Boomer-retirements, commuting congestion during the winter months that lengthens commute times, and modest basic skills among job applicants. Other challenges include a low employer assessment of the area's secondary and post-secondary schools and their graduates and modest public school evaluations, despite very strong and laudable efforts by area educators to improve their facilities and programs over the past several years.

These challenges are significant, but they can be met by a combined effort of educators, the Horizon Council, the Southwest Florida Workforce Development Board, employers, elected officials, and other stakeholders. One employer-based approach would be implementation of higher wages and salaries. This action would help retain their workers caught in a financial squeeze. They could also attract more job candidates—notably among residents who are commuting to jobs at the periphery of or outside the county (15.7% of workers have a one-way commute of 30 to 44 minutes, and 11.5% commute 45 minutes or more). Higher wages and salaries could also attract more workers from surrounding counties and from residents who are not currently working.

Another answer to the labor shortages lies in Lee County's large hidden labor force. This hidden workforce consists of not-employed residents who would like to work (93,351) and underemployed residents (43,328). The potential relief from the not-employed, however, is somewhat constrained, because almost 44% (41,490) are over the age of 55, and about 32% (30,253) are seeking part-time employment—factors that may limit their appeal to many employers. On a positive note, nearly two-thirds of these residents would welcome training, even at their own expense. Most of the not-employed who are interested in working have no limitation to working. There are approximately 16,500

county residents, however, that are constrained in their ability to enter the workforce because of transportation and childcare needs. Special employer or other programs addressing these issues could bring some of these people into the workforce. The hidden workforce also includes graduating secondary- and post-secondary-school students that need good career opportunities to keep them in Lee County.

Employers could bolster their available workforce by keeping as many of their retirement-ready employees employed. These individuals frequently have the skills, experience, and work ethic that make them valued employees. To retain these workers and attract other mature workers, employers need to have workplace policies that meet the needs of these workers, such as job sharing, job transitioning, phased retirement, flex-time, part-time, telecommuting, etc. Special training programs may also be needed to expand mature workers' technical skills.

Meanwhile, younger single and married residents are needed in the county to balance the area's high ratio of residents over 55 years old. Employers, especially those in technology and manufacturing sectors, typically favor younger employees. Efforts, therefore, are needed to attract these younger residents to the county by offering the environment they seek. Good school systems, social opportunities, and diversified moderate-cost housing are key attractions for this demographic group.

WDG sees a need for continued, coordinated, and broad-based proactive work to meet the county's workforce challenges by the public and private sectors, educators, trainers, and other key stakeholders, and this work must be considered a priority if the county's economic vitality is to continue. In our opinion, the area has the resources to achieve these goals.

Recommendations for Action

Workforce recruitment and development should receive urgent attention using all of the resources available in Lee County. The following recommendations are offered as *priority* steps to be taken by a designated lead agency (potentially the Horizon Council, the Economic Development Office, the Southwest Florida Workforce Development Board, or a regional entity), and are addressed at recruiting more workers to the region, retaining the graduates of local schools, pulling more non-working residents into the workforce, training/retraining residents to meet the current and future needs of employers, and keeping the retiring residents in the workforce as long as possible.

1. **Conduct an on-going labor recruitment effort across the country.** Develop a recruitment strategy that is aimed at all working-age groups across the country. Special marketing messages for each group should be developed that address their key issues. These issues could be developed through a variety of focus groups, and the marketing material then created from the findings of those focus groups. The messages can be crafted into special sections on the designated lead agency's or other websites, used in hard-copy material, and in special direct-mail solicitations. The lead agency can serve as the facilitator and coordinator of special recruitment efforts for area employers. Part of the facilitator's role would be assurance that duplicative recruitment efforts are not being made. Recruiting, though will be challenged by the region's high cost of living (including housing related costs), lower than average wages/salaries and modestly performing public schools.
2. **Create a structured job-assistance program among area employers to find employment for the spouses of relocating personnel.** A centralized job-opportunities clearinghouse should be established to share information regarding professional and non-professional job opportunities for relocating spouses. The clearinghouse is also encouraged to create an assistance network that can provide community information and guidance on adjusting to the local and regional cultural environment.
3. **Promote the use of co-op and internship programs among college and university students and area employers.** The designated lead agency is encouraged to work closely with area employers to develop co-op and internship programs in a variety of fields with Lee County High Tech Center-Central, Edison College, Southwest Florida College, Florida Gulf Coast University, and Hodges University. Such programs can enhance recruitment of students by employers upon graduation, and build an experienced "fresh-out" workforce. The designated lead agency can help employers by providing program coordination at universities, making contacts, searching out best practices, and coordinating low- or moderate-cost housing for summer interns from outside the region (such as the dormitories of local colleges and universities).
4. **Encourage employers to improve their human-resource practices.** The designated lead agency, as a catalyst, is urged to promote improved human-resource practices among area employers. Examples include use of a career-laddering model; providing flexibility in work hours and use of vacation time in partial-day increments; flexible work scheduling; and expanded training on company time. While Lee County's unemployment rate has risen steadily over the past six months, employers surveyed and/or interviewed in August 2007 reported recruiting constraints in certain occupations. For occupations impacted by tight labor supply conditions, higher wages and benefits may be needed. Promotional programs could include after-hours or breakfast seminars or webinars with human-resource-policy experts from within or outside the region. The special needs of small employers will have to be considered.

5. **Encourage employers to keep and attract employees over 50 years old.** To attract the large numbers of mature county residents that are not working now but would like to work, and to retain currently employed mature workers in the workplace, special employer accommodations will have to be considered that meet the needs of these people, such as flexible working hours, part-time work, and for the currently employed, phased retirement programs. Programs ideas have been advanced by several AARP studies, including *Staying Ahead of the Curve 2004: Employer Best Practices for Mature Workers*, and *The Business Case for Workers Age 50+: Planning for Tomorrow's Talent needs in Today's Competitive Environment*. Both of these publications are available on AARP's website (www.aarp.org). According to our resident survey, these residents are well educated and possess skills needed to fill some of the current workforce gaps. We also urge the Horizon Council to investigate some of the best practices across the country for keeping and attracting residents over the age of 50 in the workforce. One example is the *Arizona Mature Worker Initiative*. The contact for initiative and the National Governors Association Center for Best Practices can be found at www.wadley-donovan.com/workforce.
6. **Develop stronger educator/employer linkages to enhance the use of the region's educational resources by employers for employee training and recruiting, to alert employers to the full breadth of educational resources available in the region, and to provide the educators with information on the training needs of area employers.** A designated neutral third party would be an essential agent for change, serving as a catalyst to bring the employers and educators together. It is recommended that local and regional Workforce Development Boards be included in this consortium.
7. **Promote a greater role by the private sector in workforce training.** Because conditions are changing, employers need to recognize that workforce development is no longer the sole responsibility of educators and workforce-development professionals. Employers must now be part of the process. Examples in which employers can participate include: formalized programs in mentoring (by trained employees); job shadowing with educators, principals, and guidance counselors; and one-on-one mentoring between employees and students on personal development, job skills, and life skills (similar to Big Brother and Sister programs). A broader use of the Junior Achievement Program or concept is urged within the educational system.
8. **Provide job counseling to the retired who want to continue working, and to the not-employed who may wish to re-enter the workforce.** These individuals could use a variety of training programs, including career-changing opportunities and challenges; available educational resources for training and skills enhancement; skills testing; career counseling; and résumé writing. Such programs could be offered by Workforce Investment Boards at various venues across the region to maximize access and availability.
9. **Attract and retain the "Talented Young" through quality-of-life enhancements and niche marketing.** It is recommended that the region make a concerted effort to attract and retain this population segment. The living environment attractive to these people needs to be expanded in the area. It is urged that focus groups be conducted with local residents in the 22-to-35-year age range to determine what they want. Successful developments will be slow and will be created by a blend of actions by the public and private sectors. The public-sector role will be in regulatory, incentive, or facility-development efforts. Local development may contain elements used in other locations, but what happens in the region must be based on existing resources, conditions, and needs. The effort should be addressed towards points where Lee County offers an advantage: more livable scale, less congestion than is seen in larger metropolitan areas, diverse housing environments, moderate cost of living, numerous accessible and less-crowded recreational opportunities, better opportunities for enterprising young people to be recognized, etc.

10. **Improve the region's quality of education.** It is important that the quality of education be high at all of the region's high schools. Strategies to meet the Average Yearly Progress requirements of the No-Child-Left-Behind initiatives must be strongly supported by the communities and the entire county. All efforts to increase school grades in Florida's A+ program are also strongly recommended. In order to generate a quality workforce and attract skilled workers to the region, system-wide educational excellence is necessary.
11. **Improve the state's educational standing.** In data from the National Science Foundation and *Leaders and Laggards: A State-by-State Report Card on Educational Effectiveness*, produced by the Institute for Competitive Workforce, Florida gets poor grades. The Horizon Council is urged to lobby aggressively to ensure that programs are underway to improve the state's educational performance.
12. **Improve graduation rates at area high schools, technical centers, colleges, and universities.** More student monitoring and intervention programs, focused tutoring efforts, or financial assistance programs are needed to reduce high school drop-out rates and college/university retention rates.

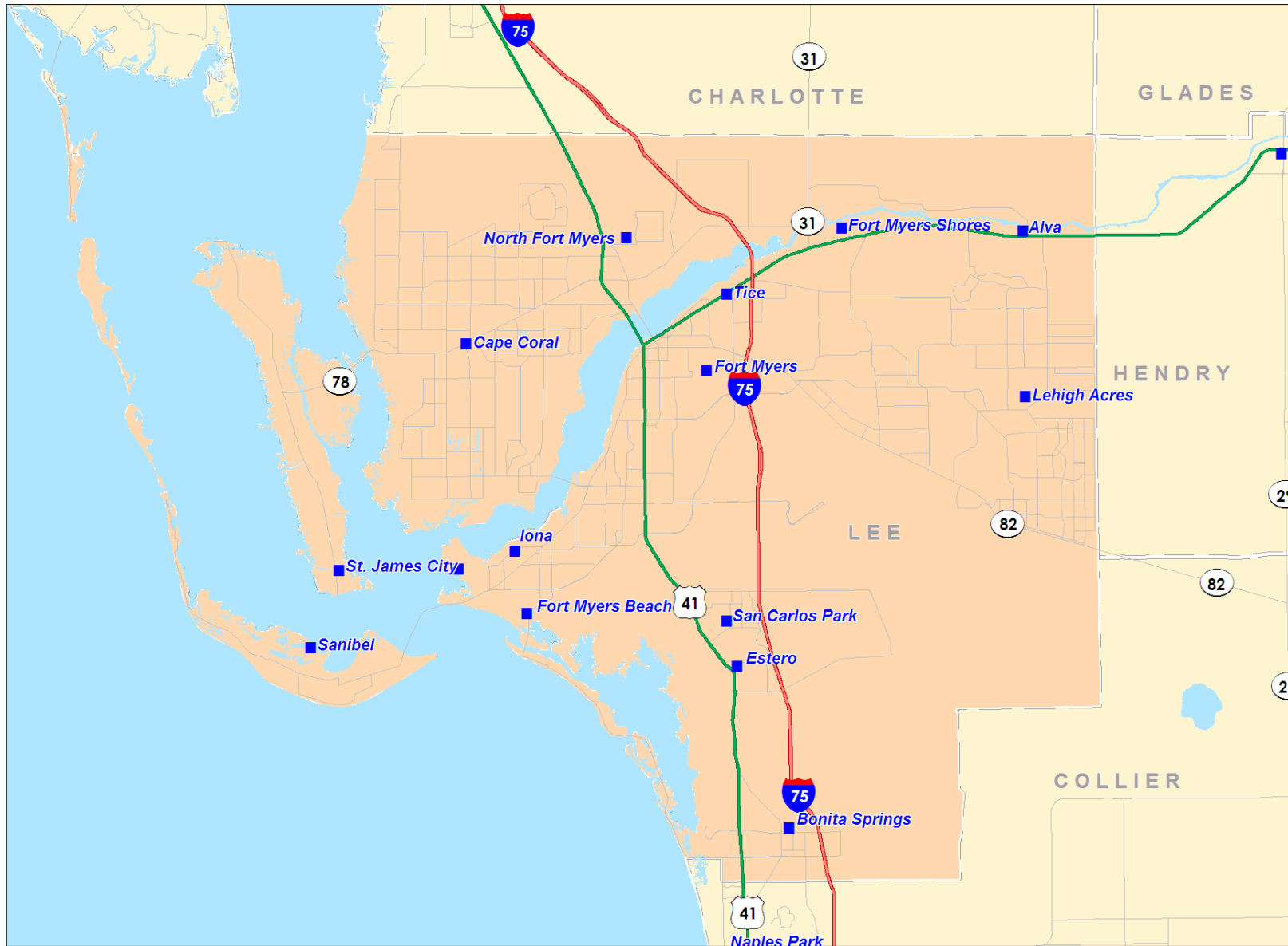
FIGURE 1: LEE COUNTY IN THE CONTEXT OF THE SOUTHEASTERN U.S.



FIGURE 2: LEE COUNTY IN THE CONTEXT OF FLORIDA



FIGURE 3: DETAIL OF LEE COUNTY



LABOR MARKET ASSESSMENT

Geographic Orientation

1. **Lee County is located on the southwest coast of Florida approximately 125 miles south of Tampa and 115 miles west of Fort Lauderdale. It is bordered by Charlotte County to the north, Collier County to the south, and Hendry County to the east.** In 2007, according to Claritas estimates, the county has a sizable population base of 579,463 residents. The Cities of Cape Coral and Fort Myers combined contain 209,219 residents (2007 Claritas estimate), and make up the largest population center in the area, accounting for 36% of Lee County's population. The Cape Coral-Fort Myers Metropolitan Statistical Area consists solely of Lee County.
2. **Primary access to the county is provided by I-75, which extends between Fort Lauderdale, Florida (at I-95/I-195) and Naples, Florida before taking a northward turn and extending throughout the western and west-central regions of the entire state.** Fort Myers serves as the hub of the Lee County area, and is at the convergence of a number of U.S., state, and local roadways, including Routes 41, 80, 82, 884, and 867. This highway network provides access to a multi-county labor shed, though congestion along the north/south corridors (I-75 and U.S. Route 41) is considerable during morning and evening rush hours, particularly during the winter months.
 - Table 2 shows mileage and driving distances from Fort Myers to select local and regional destinations. Destinations in the State of Florida and the southern halves of Alabama and Georgia can be reached in less than a ten hours' drive.

TABLE 2: Distance from Fort Myers to Select Local and Regional Destinations
Source: Microsoft MapPoint

Destination City	From Fort Myers, FL	
	Highway Miles	Driving Time
Atlanta, GA	574	8 hrs, 51 mins
Jackson, MS	818	12 hrs, 44 mins
Memphis, TN	926	14 hrs, 39 mins
Miami, FL	158	2 hrs, 22 mins
Montgomery, AL	600	9 hrs, 19 mins
Orlando, FL	154	2 hrs, 48 mins
Raleigh, NC	769	12 hrs, 22 mins
Tampa, FL	127	1 hr, 54 mins

- Air service is provided through the Southwest Florida International Airport located in Ft. Myers. The airport has a new and very attractive terminal building. Table 3 shows those locations that can be reached from Fort Myers on daily direct flights. Direct flights are available to 39 destinations (36 domestic and three international), with five or more daily flights available to Atlanta (12), Chicago (10), New York/Newark (10), Detroit (4), and Washington, DC (6).

TABLE 3: Daily Direct Flights Offered From Southwest Florida International Airport (RSW)

Source: OAG, Inc.

Destination City	Southwest Florida International Airport (RSW)	
	Daily Direct Flights	Flight Time
Akron-Canton, OH	1	2 hrs, 30 mins
Atlanta, GA	12	1 hr, 45 mins
Atlantic City, NJ	1	2 hrs, 35 mins
Baltimore, MD	4	2 hrs, 20 mins
Boston, MA	4	3 hrs, 5 mins
Buffalo, NY	--	--
Charlotte, NC	4	1 hr, 50 mins
Chicago, IL	10	3 hrs, 0 mins
Cincinnati, OH	2	2 hrs, 25 mins
Cleveland, OH	2	2 hrs, 40 mins
Columbus, OH	--	--
Dallas/Fort Worth, TX	3	2 hrs, 55 mins
Denver, Co	2	4 hrs, 15 mins
Detroit, MI	6	2 hrs, 50 mins
Dusseldorf, Germany	--	--
Flint, MI	1	2 hrs, 50 mins
Hartford, CT	--	--
Houston, TX	3	2 hrs, 40 mins
Indianapolis, IN	3	2 hrs, 40 mins
Kansas City, MO	1	3 hrs, 5 mins
Key West, FL	4	0 hrs, 57 mins
Long Island, NY	1	2 hrs, 40 mins
Memphis, TN	--	--
Miami, FL	3	0 hrs, 50 mins
Milwaukee, WI	1	3 hrs, 4 mins
Minneapolis, MN	4	3 hrs, 35 mins
Munich, Germany	--	--
New York/Newark, NY-NJ	10	2 hrs, 55 mins
Orlando, FL	4	0 hrs, 50 mins
Philadelphia, PA	2	2 hrs, 45 mins
Pittsburgh, PA	1	2 hrs, 30 mins
St. Louis, MO	1	2 hrs, 35 mins
Tampa/St. Petersburg, FL	2	0 hrs, 50 mins
Toronto, ON	2	3 hrs, 5 mins
Washington, DC	6	2 hrs, 20 mins
White Plains, NY	1	2 hrs, 51 mins

Labor Market Orientation

1. **The county’s labor force grew by 29.4% between 2000 and 2006, while the number and percentage of unemployed residents declined.** In 2006, Lee County contained a civilian labor force of 283,015 residents, expanding by 29.4% between 2000 and 2006. The 30-minute commute zone around the intersection of Alico Road and I-75 encompasses the largest labor pool (233,321 residents) of the three locations surveyed. The area’s annual average unemployment rate stood at 2.9% in 2006, slightly below Florida (3.3%) and well below the national average (4.6%). (Refer to Table 4). In September 2007, however, Lee County’s unemployment rate increased to 5.2%, which is well above the state and national averages (4.3% and 4.5%, respectively). Much of this increase is due to a downturn in the construction sector.

TABLE 4: Regional Labor Force Dynamics
Source: U.S. Bureau of Labor Statistics, U.S. Census Bureau

	Lee County	Downtown Ft. Myers 30-min CZ	Santa Barbara Blvd & Pine Isl 30-min CZ	Alico Rd & I-75 30-min CZ	Florida	U.S.
Labor Force, 2006	283,015	224,342	206,657	233,321	8,988,611	151,428,000
% Change 2000 – 2006	29.4%	24.6%	24.0%	22.9%-	12.4%	5.4%
Unemployment Rate, 2006	2.9%	3.7%	3.9%	3.6%	3.3%	4.6%
Labor Participation, 2007 (Claritas)	54.0%	55.3%	55.1%	53.2%	58.6%	64.1%

2. **Labor-force participation is low in the county (54.0% vs. 64.1% nationally).** This low participation rate may indicate a strong potential for additional workers to enter and actively participate in the local workforce, given the right employment and/or skills-retraining opportunities. Labor participation rates for the three commute zones are also low, and all are lower than the state and national rates. (Refer to Table 4 above).
3. **According to the U.S. Census Bureau’s County Business Patterns, the top five industry sectors in 2005 (as measured by employment) for Lee County were retail trade (34,047), construction (27,697), health care and social assistance (24,406), accommodation and food service (21,661), and other services (8,451).** These five industry sectors encompassed 64% of all jobs in the county. (Refer to Table 5).

TABLE 5: Industry Growth in Lee County, Florida, and the U.S. – Two-digit NAICS Codes

Source: U.S. Census Bureau, County Business Patterns, 2005 and 2000

2-Digit NAICS	Industry	Lee County				Florida		U.S.	
		# Jobs 2005	# Estabs. 2005	Jobs % Chg. '00-'05	Estabs. % Chg. '00-'05	Jobs % Chg. '00-'05	Estabs. % Chg. '00-'05	Jobs % Chg. '00-'05	Estabs. % Chg. '00-'05
-	Total-All Industries	181,553	16,090	27%	30%	14%	18%	2%	6%
Industry Sectors in which Lee County Job Growth or Establishment Growth Exceeds U.S. Growth									
22	Utilities	847	26	33%	-4%	8%	1%	-3%	0%
23	Construction	27,697	2,589	65%	55%	29%	46%	3%	11%
31	Manufacturing	7,190	407	21%	9%	-11%	-7%	-17%	-6%
42	Wholesale Trade	5,915	666	26%	11%	-1%	3%	-2%	-4%
44	Retail Trade	34,047	2,336	20%	14%	9%	7%	3%	1%
48	Transportation & Warehousing	3,447	370	57%	39%	7%	19%	10%	11%
52	Finance & Insurance	6,745	1,019	44%	34%	19%	25%	8%	13%
53	Real Estate & Rental & Leasing	6,265	1,498	32%	97%	27%	52%	10%	23%
55	Management of Companies & Enterprises	2,383	45	28%	-8%	1%	6%	-1%	0%
61	Educational Services	1,459	102	86%	42%	25%	27%	14%	18%
62	Health Care & Social Assistance	24,406	1,282	44%	24%	17%	19%	14%	13%
71	Arts, Entertainment, & Recreation	4,790	259	35%	34%	18%	28%	11%	17%
72	Accommodation & Food Services	21,661	1,004	27%	20%	21%	17%	12%	11%
81	Other Services (except Public Administration)	8,451	1,403	15%	14%	2%	5%	2%	2%
Industry Sectors in which Lee County Job Growth or Establishment Growth Meets/Is Lower than U.S. Growth									
11	Forestry, Fishing, Hunting, & Agriculture Support	97	19	-26%	-17%	20%	-12%	-8%	-8%
21	Mining	273	9	-8%	13%	-4%	11%	9%	4%
51	Information	3,985	221	-16%	11%	1%	19%	-4%	6%
54	Professional, Scientific, & Technical Services	9,404	1,710	9%	39%	11%	30%	13%	14%
56	Administrative & Support & Waste Management & Remediation Services	12,462	1,107	-1%	29%	33%	14%	2%	5%
99	Unclassified Establishments	29	18	-78%	-86%	-82%	-81%	-78%	-76%

* Top five industry sectors by percentage employment growth in **bold**.

4. The top five expanding industries in Lee County (as measured by employment growth, where trend data is available) between 2000 and 2005 in Table 5 (above), are educational services, transportation and warehousing, construction, finance and insurance, and healthcare and social assistance. Table 6 summarizes the top five growing industry sectors in Lee County, Florida, and the U.S. As the table shows, the five leading industry sectors in the county differ considerably from those of the state and nation.

TABLE 6: Industry Sector Commonalities – Lee County, Florida, And the U.S.
Source: U.S. Census Bureau, County Business Patterns, 2005 and 2000, Tables 45 and 46

Industry Sectors	Lee County	Florida	U.S.
Construction	X	X	
Transportation & Warehousing	X		
Finance and Insurance	X		
Real Estate & Rental & Leasing		X	
Educational Services	X	X	X
Health Care & Social Assistance	X		X
Arts, Entertainment, & Recreation			X
Accommodation & Food Services		X	X
Professional, Scientific, & Technical Services			X
Administrative & Support & Waste Management & Mediation Services		X	

5. **The county's employment ratio by occupation matches or exceeds national averages in eleven occupational groups.** The five most dominant regional occupations are sales-related, construction/extraction, food preparation/serving-related, healthcare practitioner/technician, and building/grounds cleaning/maintenance.
- Lee County's employment ratios lag behind the nation in several knowledge-based occupational groups, including architecture/engineering, arts/design/entertainment/sports/media, computer and mathematical, education/training/library, financial specialists, life/physical/social science, and management including farmers and farm managers. (Refer to Table 7.) In the short term, employers seeking these knowledge-based skills may need to recruit workers from outside the region to fill replacement and expansion needs. Educational institutions and workforce-training providers are encouraged to cooperate in identifying these skill deficiencies and to address strategies to bolster the supply of knowledge-based skills in the area.

TABLE 7: Percent Employment within Occupational Groups for Lee County, Florida, and U.S. 2007
Source: Claritas

Occupational Group	Lee County	Florida	U.S.
<i>Regional Occupational Groups that Match or Exceed National Employment Ratios</i>			
Building/Grounds Cleaning/Maint	5.1%	4.0%	3.2%
Construction/Extraction	8.7%	6.1%	5.5%
Farming/Fishing/Forestry	0.8%	0.9%	0.7%
Food Preparation/Serving-related	5.8%	5.4%	4.7%
Healthcare Practitioner/Technician*	5.5%	5.0%	4.6%
Healthcare Support	2.1%	2.0%	2.0%
Installation/Maintenance/Repair*	4.5%	4.1%	4.0%
Legal*	1.1%	1.2%	1.1%
Personal Care/Service	2.8%	2.8%	2.8%
Protective Service	2.3%	2.4%	2.0%
Sales/Related	15.4%	13.5%	11.3%

TABLE 7 (Continued): Percent Employment within Occupational Groups for Lee County, Florida, and U.S. 2007
Source: Claritas

Occupational Group	Lee County	Florida	U.S.
Regional Occupational Groups that Lag National Employment Ratios			
Architecture/Engineering*	1.2%	1.7%	2.1%
Arts/Design/Entert/Sports/Media*	1.8%	2.0%	1.9%
Business operations specialists	1.5%	2.1%	2.1%
Community/Social Services	1.3%	1.3%	1.5%
Computer and Mathematical*	1.0%	1.9%	2.5%
Education/Training/Library*	4.1%	4.7%	5.7%
Financial specialists*	1.9%	2.2%	2.2%
Life/Physical/Social Science*	0.5%	0.6%	0.9%
Management incl Farmers/Farm Mgrs*	8.9%	9.3%	9.4%
Office/Administrative Support	14.6%	16.1%	15.4%
Production	4.0%	5.1%	8.4%
Transportation/Material Moving	5.2%	5.6%	6.1%
Total Knowledge-based Occupational Groups	30.5%	32.7%	34.4%

*Key knowledge-based occupational groups

Population and Demographics Overview

1. **Lee County’s population base has been growing since 2000, and strong increases in population are forecasted through at least 2012.** Between 2000 and 2007, the county’s population increased by 138,575 residents (31.4% growth). Between 2007 and 2012, the population is expected to increase by another 99,495 residents (17.2% growth), bringing the projected population in 2012 to 678,958. (Refer to Table 8).

TABLE 8: Population of Lee County, Florida, and U.S.
Source: U.S. Census Bureau, Claritas

Area	1990 Census	2000 Census	2007 Claritas	2012 Claritas	Percent Change			
					Census		Claritas	
					1990 – 2000	2000 – 2007	1990 – 2007	2007 – 2012
Lee County, FL	335,113	440,888	579,463	678,958	31.6%	31.4%	72.9%	17.2%
Florida	12,937,926	15,982,378	18,360,271	20,097,832	23.5%	14.9%	41.9%	9.5%
U.S.	248,709,873	281,421,906	301,045,522	314,920,978	13.2%	7.0%	21.0%	4.6%

2. **The largest population base among the three commute zones analyzed is within a 30-minute drive time of downtown Fort Myers.** Employers locating at this vicinity will have access to a population base of 504,003.
 - The highest population gain between 2007 and 2012 (17.3%) is projected to occur within a 30-minute drive time of the intersection of Santa Barbara Boulevard and Pine Island Road in Cape Coral. Population estimates and projections are provided in Table 9,

while complete demographic information for the commute zones is provided in Exhibit D-1. Commute zones are illustrated in Appendix A.

TABLE 9: Estimated and Projected Population Figures for 30-Minute Commute Zones for Three Selected Sites
 Source: U.S. Census, Claritas

Area	1990 Census	2000 Census	2007	2012	% Change 1990 - 2000	% Change 2000 – 2007	% Change 2007 – 2012
Downtown Fort Myers CZ	301,853	384,123	504,003	590,171	27.3%	31.2%	17.1%
Santa Barbara Blvd & Pine Island CZ	259,654	322,917	425,096	498,519	24.4%	31.6%	17.3%
Alico Road & I-75 CZ	273,246	359,780	467,841	546,390	31.7%	30.0%	16.8%

- Lee County has an older population than the state and nation do.** According to Claritas, the median age in Lee County in 2007 is 43.5 years, compared to 39.8 years in Florida, and 36.6 years in the U.S. This higher median age is driven largely by a high percentage of residents 55 years of age and older (35.1% in Lee County compared to the U.S. average of 23.3%). This profile can be a distinct disadvantage, as many companies prefer to locate operations in areas with a median age that approximates or is below the national norm for optimum access to younger talent. Younger employees typically offer a higher energy level and technical awareness; learn faster; are more creative, agile, and flexible; and typically require lower healthcare costs and salaries than older employees do. A higher-aged population can limit opportunities for future workforce expansion by employers.
- Despite the area’s older population base, Lee County’s concentrations of young and working-age residents are expected to increase more rapidly than the national rates – which can be an advantage for future growth and sustainability.** Claritas forecasts show that between 2007 and 2012 the concentrations of young residents in the 0-to-17-, 18-to-34-, and 35-to-54-year-old age groups will grow substantially more than the national and state averages. (Refer to Table 10). Nevertheless, Lee County’s median age will remain above the U.S. and state averages.

TABLE 10: Age Distribution for Lee County, Florida, and U.S., 2007
 Source: Claritas

Area	Median Age	Projected % Change in Age Distribution, 2007-2012					
		0-17	18-34	35-54	55-64	65-74	75 and over
Lee County	43.5	16.3%	13.6%	13.8%	16.7%	29.9%	19.5%
Florida	39.8	6.2%	8.5%	3.9%	18.3%	22.1%	14.0%
U.S.	36.6	1.3%	2.3%	-0.1%	18.4%	20.6%	7.2%

- Lee County’s educational characteristics are moderate compared to the state and nation, according to Claritas estimates for residents aged 25 years and older.** In 2007, 83.0% of the county’s population had at least a high school diploma. This is higher than the state and national averages (80.3% and 80.6%, respectively). The concentration of residents with 12 to 15 years of education (61.3%) is higher than the national average (56.0%); however, this is attributable to a higher concentration of residents earning the high school diploma only. A lower proportion of residents have bachelor’s and graduate degrees than the national and state averages. (Refer to Table 11 and Figure 4).

- The concentrations of residents with associate’s degrees (6.2%), bachelor’s degrees (13.9%), graduate degrees (7.7%), and those residents with 16 or more years of education (21.6%) lag behind the national averages of 6.4%, 15.7%, 8.9%, and 24.6%, respectively.

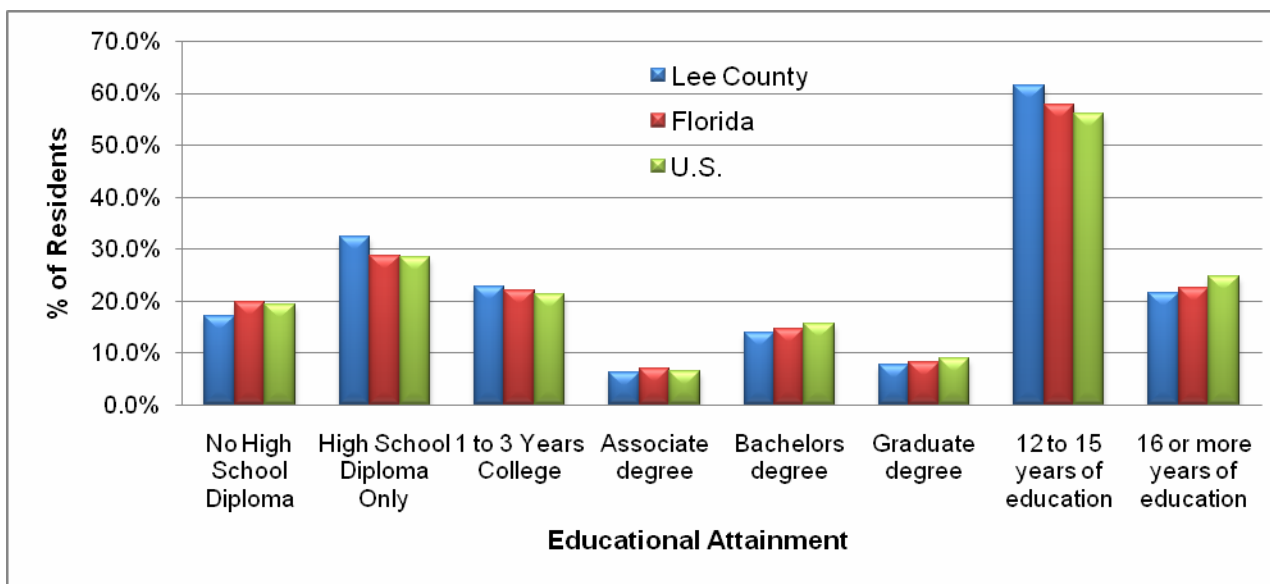
TABLE 11: Education Levels for Lee County, Florida, and U.S., 2007

Source: Claritas

Area	No High School Diploma	High School Diploma Only	1 to 3 Years College	Associate degree	Bachelors degree	Graduate degree	12 to 15 years of education	16 or more years of education
Lee County	17.0%	32.3%	22.8%	6.2%	13.9%	7.7%	61.3%	21.6%
Florida	19.7%	28.7%	21.9%	7.1%	14.5%	8.1%	57.7%	22.6%
U.S.	19.4%	28.4%	21.2%	6.4%	15.7%	8.9%	56.0%	24.6%

FIGURE 4: Educational Attainment for Lee County, Florida, and U.S., 2007

Source: Claritas



6. **Household incomes in Lee County are higher than the Florida average, but are lower than national averages.** The 2007 median household income in Lee County (\$48,753) is about 7% greater than the Florida average (\$45,757) and about 1% lower than the national average (\$49,314). (Refer to Table 12 and Figure 5).
- According to Claritas, 33.9% of the households in the Lee County area earn less than \$35,000 annually, compared to 38.0% in Florida and 35.1% nationally. WDG frequently finds that the higher the percentage of households earning less than \$35,000, the more likely it is to have residents interested in upgrading their jobs and career advancement, working second jobs, or working as second-income earners.

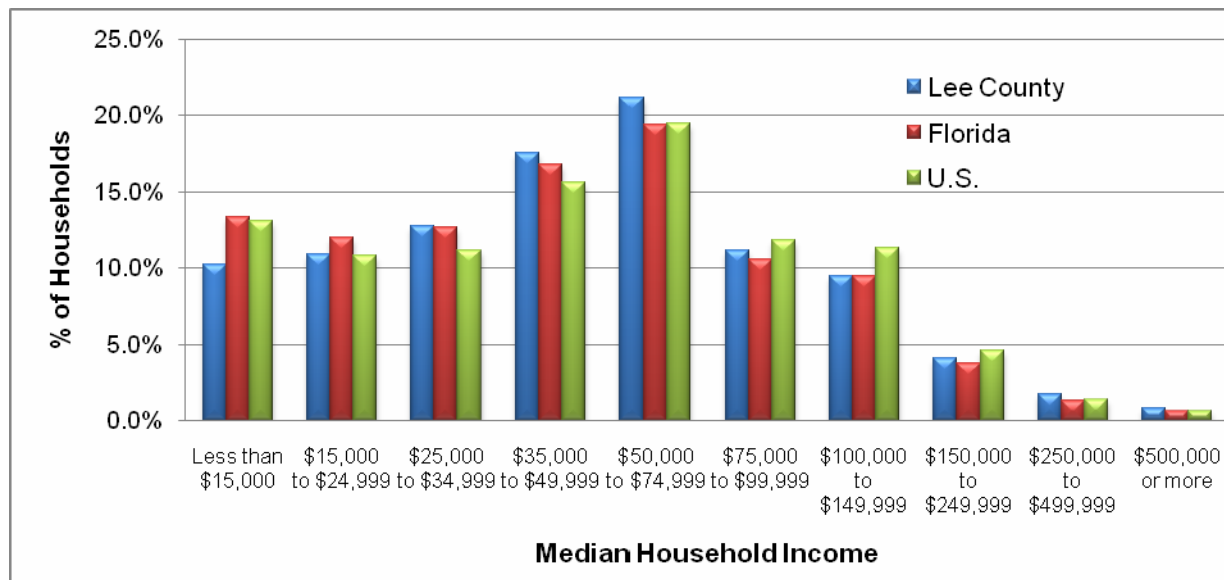
TABLE 12: Household Incomes for Lee County, Florida, and U.S., 2007

Source: Claritas

Area	Median Household Income	% of Households Earning		
		Less than \$35,000	Between \$35,000 and \$75,000	Greater than \$75,000
Lee County	\$48,753	33.9%	38.7%	27.4%
Florida	\$45,757	38.0%	36.2%	25.9%
U.S.	\$49,314	35.1%	35.1%	29.8%

FIGURE 5: Household Income Distribution for Lee County, Florida, and U.S., 2007

Source: Claritas



Labor Availability

1. **The commute zone around the intersection of Alico Road and I-75 provides the largest labor pool of the commute zones surveyed.** As previously noted, a 30-minute commute zone was developed for three selected county sites to estimate the labor force available to a company locating at each of these sites. Labor force data for these zones is shown in Exhibit D-2 and Table 13. These zones are illustrated in Appendix A.

TABLE 13: Commute Zone Labor Force Dynamics
Source: U.S. Bureau of Labor Statistics, U.S. Census Bureau

Area	Labor Force 2006	% Change 2000 – 2006	Unemployment Rate, 2006	Labor Participation 2007 (Claritas)
Downtown Ft. Myers CZ	224,342	24.6%	3.7%	55.3%
Santa Barbara Blvd & Pine Island CZ	206,657	24.0%	3.9%	55.1%
Alico Road & I-75 CZ	233,321	22.9%	3.6%	53.2%

2. **One or more competitively-paying office operations could potentially hire up to 1,624 qualified and screened workers, during the first year of operation, depending on their facilities' locations in the region.** As seen in Table 14, these estimates are based on WDG's standard clerical/nonexempt-labor-supply model applied to each of the three representative work sites, using—in part—results from YA's household survey. These estimates show the number of qualified clerical and administrative support employees an employer could potentially hire, given a one-in-three and a one-in-five selectivity ratio. The site located in downtown Fort Myers provides the largest clerical labor supply.

TABLE 14: Estimated Clerical and Administrative Support Labor Supply Yield by Commute Zone
Source: WDG estimate based on population and employment numbers from Claritas and YA household survey results

Factor	Maximum Size of a Clerical/Office Operation:			
	Downtown Fort Myers 30-Min CZ	Santa Barbara Blvd & Pine Island 30-Min CZ	Alico Road & I-75 30-Min CZ	
1	Currently employed supply	8,135	6,864	6,994
2	Potential underemployment yield	7,532	6,327	6,988
3	Not employed	1,744	1,534	1,536
4	New labor force entrants	2,883	2,460	2,479
5	Total expected applicants – 1 year	20,295	17,184	17,996
6	Applicant commute propensity	16,236	13,748	14,397
7	Initial employer intercept	9,741	8,249	8,638
8	Qualified Applicants	4,871	4,124	4,319
9	1 in 3 selectivity ratio	1,624	1,375	1,440
10	1 in 5 selectivity ratio	974	825	864

TABLE 14 (continued): Estimated Clerical and Administrative Support Labor Supply Yield by Commute Zone*Source: WDG estimate based on population and employment figures from Claritas***Explanatory Notes**

1. Estimate of currently employed clerical workers unhappy enough with their current job to apply. WDG assumes 25% of residents employed in administrative support/clerical occupations will apply for new positions.
2. Individuals currently working in low-level sales and service occupations (including health support, personal services occupations, and food prep/serving-related) who will apply. WDG assumes that 10% of residents currently employed in sales and service occupations will apply for new positions.
3. Not-employed residents that would be interested in working in office operations. WDG assumes 20.2% of not-employed residents will apply for office positions, based on the workforce survey unemployed characteristics.
4. Growth component to account for new entrants into the labor force. Includes a percentage of college graduates and new residents that are likely to apply for administrative/clerical positions.
5. Total eligible population.
6. Percentage of workers willing to commute up to 30 minutes for employment – based on prevailing area commuting patterns, 80% of the total number of applicants (line 5) is assumed. The propensity for underemployed residents and not-employed residents to commute longer distances for jobs meeting their expectations is not factored into the model. If it were, the number of potential applicants would be higher.
7. Percentage of workers (among those willing to commute as shown in line 6) who will work at new operation despite similar positions available between their residence and the original employers. In this case, it is assumed that an employer coming into the area will face competition from existing employers. It is assumed that 60% of workers will work at a new operation despite similar positions available between their residence and the new employer.
8. Number of applicants shown in line 7 passing initial screening and offered an interview. The actual percentage will vary according to the skills required by the operation, and the skill level of the available workforce. It is assumed 50% will qualify.
9. The number of employees an employer could hire assuming a selectivity ratio of one hire per three applicants.
10. The number of employees an employer could hire assuming a selectivity ratio of one hire per five applicants.

3. **One or more competitively-paying manufacturing/distribution operations could potentially hire up to 1,571 qualified and screened workers, depending on their facilities' locations in the region.** As seen in Table 15, these estimates are based on WDG's standard manufacturing/distribution-labor-supply model applied to each of the three representative work sites, based upon data received from the household survey. These estimates show the number of qualified employees a manufacturing/distribution employer could potentially hire, given a one-in-three and a one-in-five selectivity ratio. The site located in downtown Fort Myers provides the largest manufacturing-related labor supply. The model assumes an occupational profile with a standard dominant distribution among semi-skilled positions.

TABLE 15: Estimated Manufacturing/Distribution Labor Supply Yield by Commute Zone

Source: WDG estimate based on population and employment figures from Claritas

Factor		Maximum Size of a Clerical/Office Operation:		
		Downtown Fort Myers 30-Min CZ	Santa Barbara Blvd & Pine Island 30-Min CZ	Alico Road & I-75 30- Min CZ
1	Currently employed supply	7,682	6,392	6,293
2	Potential underemployment yield	7,653	6,446	7,152
3	Not employed	1,589	1,397	1,399
4	New labor force entrants	2,711	2,281	2,222
5	Total expected applicants – 1 year	19,635	16,517	17,065
6	Applicant commute propensity	15,708	13,213	13,652
7	Initial employer intercept	9,425	7,928	8,191
8	Qualified Applicants	4,712	3,964	4,096
9	1 in 3 selectivity ratio	1,571	1,321	1,365
10	1 in 5 selectivity ratio	942	793	819

Explanatory Notes

1. Estimate of currently employed production, transportation/material moving, and installation/maintenance/repair workers unhappy enough with their current job to apply. WDG assumes 25% of residents employed in these occupations will apply for new positions.
2. Individuals currently working in low-level sales, service, and farming occupations who will apply. WDG assumes that 10% of residents currently employed in sales and service occupations agriculture will apply for new positions.
3. Not-employed residents that would be interested in working in manufacturing and distribution operations. WDG assumes 18.4% of not-employed residents will apply for manufacturing positions, based on the workforce survey unemployed characteristics. It is assumed both male and female residents will apply for positions.
4. Growth component to account for new entrants into the labor force. Includes a percentage of high school graduates and new residents that are likely to apply for administrative/clerical positions.
5. Total eligible population.
6. Percentage of workers willing to commute up to 30 minutes for employment – based on prevailing area commuting patterns, 80% of the total number of applicants (line 5) is assumed. The propensity for underemployed residents and not-employed residents to commute longer distances for jobs meeting their expectations is not factored into the model. If it were, the number of potential applicants would be higher.
7. Percentage of workers (among those willing to commute as shown in line 6) who will work at the new operation despite similar positions available between their residence and the original employers. In this case, it is assumed that a new employer coming into the area would be the employer-of-choice and a high percentage of workers would commute to the employer’s new location. As more competitors enter the market, the percentage of workers accepting work at that location is assumed to decline. It is assumed that 60% of workers will work at the new operation.
8. Number of applicants shown in line 7 passing initial screening and offered an interview. The actual percentage will vary according to the skills required by the operation, and the skill level of the available workforce. It is assumed 50% would be qualified.
9. The number of employees an employer could hire assuming a selectivity ratio of one hire per three applicants.
10. The number of employees an employer could hire assuming a selectivity ratio of one hire per five applicants.

4. **WDG’s Labor Stress Index shows a labor tightness in the Cape Coral-Fort Myers MSA that is comparable to selected competitor communities in Florida and adjoining states.** WDG compared the Cape Coral-Fort Myers MSA’s labor stress index to other competitor metro areas. WDG, within its corporate-location practice, designed and constructed the labor stress index to compare the general labor market conditions in locations under consideration for corporate-facility locations. The index uses a variety

of labor-related measures focusing on labor supply and demand dynamics, including: civilian labor force size in 2006; absolute and percentage changes in the civilian labor force between 2000 and 2006; elasticity in the 2006 civilian labor force; unemployment rates in 2000, 2005, and 2006; change in unemployment rates; and 2006 labor force participation rates.

- The final scores for each MSA were indexed against the nation's highest scoring location (maximum score = 100). The Cape Coral-Fort Myers MSA received an index score of 81, which is lower than three of the ten competitor communities examined. (Refer to Table 16.)

TABLE 16: Comparative Labor Stress Index

Source: WDG

Benchmark MSA's	Labor Stress Index Score (max=100)
Miami-Ft. Lauderdale-Miami Beach, FL	85
Orlando-Kissimmee, FL	84
Tampa-St. Petersburg-Clearwater, FL	82
Cape Coral-Ft. Myers, FL	81
Jacksonville, FL	79
Sarasota-Bradenton-Venice, FL	78
Birmingham-Hoover, AL	75
Jackson, MS	73
Savannah, GA	72
Montgomery, AL	70
Tallahassee, FL	69

* Criteria and weighting detailed at right:

*Labor Stress Index – Criteria and Weighting

Criteria	Weighting	
Civilian Labor Force	2006	10%
	2000	--
	Change 2000 - 2006	5%
	Pct. Change 2000 - 2006	10%
Civilian Labor Force Elasticity	2006 Monthly Minimum	--
	2006 Monthly Maximum	--
	Change Min to Max	15%
Unemployment	2006 Rate	15%
	2005 Rate	5%
	2000 Rate	5%
	Change in Rate 2005 - 2006	15%
	Change in Rate 2000 - 2006	5%
Labor Force Participation	2006 Rate	--
	Rate vs. MSA Maximum	15%
Total:	100%	

- Of the 58 occupations for which sufficient data was received from the completed WDG employer survey, seven (12%) can be recruited satisfactorily or better (median and average scores of 3.0 or higher). Respondents to the August 2007 employer survey report that six occupations have satisfactory or slightly-above-satisfactory availability. Only one occupation (e.g., heavy-equipment operator) received a “good” availability rating (a median score of 4.0 and an average score of 4.0). (Refer to Table 17.)

TABLE 17: Select Occupations with Satisfactory or Better Availability, as Reported by Regional Employers

Source: WDG Employer Survey, Summer/Fall 2007 (5=Plentiful; 1=Unavailable)

Occupational Group/Occupation	Responses	Average Score	Median Score
General Business and Office Support			
Accounting clerks/bookkeepers	84	3.3	3.0
Administrative assistants	80	3.3	3.5
Call center agent/representative	44	3.1	3.0
Customer service representatives	59	3.3	3.0
Office clerks	58	3.0	3.0
Technical and Professional			
Accountants/auditors	44	3.0	3.0
Other			
Heavy-equipment operator	1	4.0	4.0

6. Among the 58 occupations for which sufficient data was received, surveyed employers rated eight (14%) as having **borderline-satisfactory to somewhat-unsatisfactory availability** (median scores of 2.5 to 3.0 and average scores of 2.4 to 2.9). The occupations are diverse and cover four of the five major occupational groupings. (Refer to Table 18).

TABLE 18: Select Occupations with Borderline to Somewhat Unsatisfactory Availability, as Reported by Area Employers

Source: WDG Employer Survey, Summer/Fall 2007(5=Plentiful; 1=Unavailable)

Occupational Group/Occupation	Responses	Average Score	Median Score
General Business and Office Support			
Claims processing clerks	28	2.5	3.0
Clerical workers with advanced computer skills	73	2.9	3.0
Management and Supervisory			
Construction supervisors	47	2.7	3.0
General & operations managers	48	2.7	3.0
Management, experienced	58	2.6	3.0
Production supervisors	35	2.4	3.0
Production, Maintenance and Distribution			
Building and construction workers	34	2.9	3.0
Computer and Information Systems			
Computer support specialists, technicians	34	2.5	2.5

7. Responding surveyed employers rated 18 (31%) of 58 occupations for which sufficient data was received as having **tight-to-very-tight availability**. Median scores ranged from 2.0 to 2.5 and average scores ranged from 1.8 to 2.4. Tight labor market conditions were reported in four of five occupational groups, including: management and supervisory; technical and professional; production, maintenance, and distribution; and computer and information services. (Refer to Table 19.)

TABLE 19: Select Occupations with Tight or Very Tight Availability, as Reported by Area Employers

Source: WDG Employer Survey, Summer/Fall 2007 (5=Plentiful; 1=Unavailable)

Occupational Group/Occupation	Responses	Average Score	Median Score
Management and Supervisory			
Management trainees	31	2.3	2.0
Purchasing agent	35	2.3	2.0
Technical and Professional			
CAD drafters	37	2.1	2.0
Engineering technicians	29	2.0	2.0
Engineers	35	2.1	2.0
Financial analysts/advisors	22	2.3	2.0
Sales representatives	35	2.2	2.0
Technicians (general)	23	2.0	2.0
Production, Maintenance and Distribution			
Bench assemblers	19	2.2	2.0
Electrical and electronic repairers	28	2.1	2.0
Machine operators, no setup	19	2.0	2.0
Skilled machine trades (general)	21	1.8	2.0
Maintenance mechanics	27	2.0	2.0
Shipping & receiving	29	2.4	2.0
Computer and Information Systems			
Database administrators	23	2.1	2.0
Network systems administrators	25	2.2	2.0
Network technicians	26	2.1	2.0
Programmers/analysts	25	2.0	2.0

8. **Twenty-five (43%) of the 58 occupations for which sufficient data was received were considered extremely difficult to recruit, with few to no available candidates.** Occupations reported as being unavailable in the area encompass three of the five occupations groups. These occupations received median ratings of 1.0 to 1.5 and average ratings ranging from 1.1 to 2.1 (Refer to Table 20.)

TABLE 20: Select Occupations That Are Unavailable In the Region, as Reported by Area Employers
Source: WDG Employer Survey, Summer/Fall 2007(5=Plentiful; 1=Unavailable)

Occupational Group/Occupation	Responses	Average Score	Median Score
Technical and Professional			
Medical/clinical lab technologists	14	1.4	1.0
Physical therapists	16	1.1	1.0
Physicians	14	1.2	1.0
Respiratory therapists	13	1.1	1.0
Lab technicians	18	1.8	1.0
Medical assistants	20	1.8	1.0
Medical records technicians	15	1.9	1.0
Medical secretaries	15	1.5	1.0
Nurses, licensed practical	21	1.6	1.0
Nurses, registered	22	1.5	1.0
Pharmacy technicians	14	1.4	1.0
Radiological technologists	16	1.4	1.0
Scientists (general)	16	1.6	1.0
Teachers, elementary	15	1.8	1.0
Teachers, secondary	15	1.8	1.0
Production, Maintenance and Distribution			
CNC machine operators	16	1.6	1.0
Inspectors, testers & sorters	15	1.7	1.0
Machinists/manufacturing technicians	16	1.6	1.0
Welders	20	1.9	1.5
Computer and Information Systems			
Computer operators	18	2.1	1.0
Systems analysts	22	2.0	1.5
Webmasters	21	2.1	1.0
Computer security specialists	16	1.9	1.0
Computer software engineers	24	1.7	1.0
Internet development specialists	18	1.7	1.0

9. **Summarizing the employer survey data on labor force availability, it is shown that, as of August 2007, Lee County was experiencing a tight to very tight labor market.** Employers report borderline, tight, or unavailable recruiting conditions for 88% of the occupations for which sufficient data was received. General business and office support occupations are generally the most available. Management and supervisory occupations require aggressive recruiting efforts; however, technical and professional occupations, and computer and information systems occupations are generally in the shortest supply. The availability distribution is presented in Table 21 below.

TABLE 21: Summary of Availability Distribution of Occupations within Each Occupational Group, as Reported by Area Employers
Source: WDG Employer Survey, Summer/Fall 2007

Occupational Group	Availability Distribution by Number of Occupations			
	Satisfactory To Good	Borderline	Tight to Very Tight	Unavailable
General Business and Office Support	5	2	-	-
Management and Supervisory	-	4	2	-
Technical and Professional	1	-	6	15
Production, Maintenance and Distribution	-	1	6	4
Computer and Information Systems	-	1	4	6
Other	1	-	-	-
Total	7	8	18	25
Pct. of Total	12%	14%	31%	43%

10. **Employers have some difficulty recruiting managers and professional talent from outside the area.** Surveyed employers report a median score of 3.0 and an average score of 2.6 (on a scale where 1=unable to recruit and 5=easily recruited) on their ability to relocate talent from outside the county. (Refer to Exhibit B-1 in Appendix B.)

- Employers report below-average employment opportunities for “trailing” spouses, though there are typically positions available in healthcare-related fields and in secondary and post-secondary education. Employers provide a median score of 2.0 and an average score of 2.4 on the availability of jobs for spouses who relocate with their wives/husbands/partners/significant others.
- The availability, quality, and cost of housing for relocatees is rated slightly below satisfactory (median score of 3.0 and an average score of 2.7), and the tight and expensive housing supply are considered deterrents to job acceptance.
- The quality of life as perceived by job candidates is rated as satisfactory (median score of 3.0 and an average score of 3.3), and does not serve as deterrent to job acceptance.

11. **The area has a base of post-secondary institutions that can and does provide part-time employees, interns, and graduates to area employers.** The county’s post-secondary institutions enroll approximately 22,089 students and graduate nearly 4,236 annually.

- The county’s largest primarily two-year institution is Edison College in Fort Myers. In 2005, this campus had an enrollment of 10,653 students and graduated approximately 1,313 students. Notably, bachelor’s degree programs are now offered in three program areas, with opportunities to earn bachelor’s degrees through alliances with other colleges and universities through the Edison University Center program.
- Two four-or-more-year institutions serve Lee County, including Hodges University and Florida Gulf Coast University, both located in Fort Myers. The two schools combined enrolled 8,922 students and graduated approximately 1,787 students.

12. **The impact of Baby Boomer retirement has not yet really begun nationally, as the first of this generation has just turned 61 years old; however, as the Boomers age, an unprecedented impact on the nation’s labor force will occur in escalating proportions over the next decade.** The first real hit from this coming wave will be in four to five years. This impact will significantly affect every sector of the U.S. economy, including corporate structure and policy, economic growth, and labor availability and cost. Impacts that are even more significant are projected in most of Europe and Japan. The effects will be worldwide. Lee County employers (particularly state and local government agencies and healthcare-related firms) are beginning to recognize the coming impacts of Boomer retirement on their workforce, and are considering strategies to address these impacts.

- WDG constructed a Boomer Retirement Impact Index, which measures the impact retiring Baby Boomers will have on an MSA’s workforce compared to the national average. The index compares four key measures, including: the percentage of the population between the ages of 45 and 64, the median age, the unemployment rate, and the percentage change in the civilian labor force. MSA’s are assigned a group (quintile) rating: the higher the rating, the lower the potential impact of Boomer retirement on the MSA workforce (e.g., 5=the least impact; 4=a below-average impact; 3=an average impact; 2=an above-average impact; 1=the highest impact).
- The Cape Coral-Fort Myers MSA’s Boomer impact is ranked in the third quintile, and is at general parity with the national average. Notably, all of the Florida locations listed below also rank in the third quintile or worse. (Refer to Table 22).

TABLE 22: Boomer Retirement Impact Index

Source: WDG

Benchmark MSA’s	Group Rating (5 is Lowest Impact)
Birmingham-Hoover, AL	1
Cape Coral-Fort Myers, FL	3
Jackson, MS	4
Jacksonville, FL	2
Miami-Ft. Lauderdale-Miami Beach, FL	2
Montgomery, AL	3
Orlando-Kissimmee, FL	3
Sarasota-Bradenton-Venice, FL	1
Savannah, GA	5
Tallahassee, FL	3
Tampa-St. Petersburg-Clearwater, FL	1
U.S. Average	3

* Criteria and Weighting detailed at right:

***Boomer Index – Criteria and Weighting**

Criteria	Weighting
Pct. of Population Ages 45-64 (2007)	30%
Median Age (2007)	30%
Unemployment Rate (2006 annual average)	20%
Pct. Change in Labor Force (2001-2006)	20%
Total:	100%

- Data from WDG’s employer survey indicates that an average 7.3% of currently employed workers are presently eligible or will become eligible for retirement over the next five years. This equates to approximately 20,070 employees who could retire over the next five years, based on Lee County’s civilian employment of 274,933 workers (2006 annual average).
 - Workers 65 years of age or older continue to serve as a vital workforce component. Employers responding to WDG’s survey report using these older workers in a variety of jobs across the board, including: clerical and secretarial, teachers/instructors, construction supervisors, engineering, project managers, drivers, managers, maintenance, sales representatives, police officers, nurses, and support staff. Employers are very satisfied with the work ethic and skill levels of their older employees, especially compared to that of younger employees, and many employers report there is a good pool of skilled workers among retirement age willing and able to work.
13. **Employers tend to rely on traditional recruiting techniques.** The most commonly used techniques include newspaper advertising, referrals, the Internet, word-of-mouth, and walk-ins/unsolicited resumes. Other techniques used are radio/television advertising, job fairs, and on-site employment blitzes.
14. **Lee County has a potential hidden labor supply with diversified skills, an important component of which is not-employed residents that are interested in employment.** WDG/YA estimate from the household survey data and population data that there are roughly 93,351 residents aged 18 to 74 years in the area that are not employed but are interested in employment. See Table 23 and the profile of residents not employed but interested in work in Appendix C.
- A majority of not-employed residents who are interested in working (67.6% or 63,098) are interested in full-time work, as shown in Table 23. Meanwhile, there are an estimated 30,253 individuals that are not working, but would be interested in part-time employment.

TABLE 23: Employment Preferences of Not-Employed Residents 18-74 Years Old
Source: YA Residential Survey, Summer/Fall 2007

Interest	Percentage	Number
Total - Not Employed	100%	192,037
Interested in Employment	48.6%	93,351
Not Interested in Employment/Did not Respond	51.4%	98,686
Employment Preference		
Full-Time	67.6%	63,098
Part-Time	32.4%	30,253
Total	100%	93,351

- Among not-employed residents, 23.8% are under the age of 35, indicating a modest pool of younger workers who would welcome improved job opportunities. 63.0% of the not-employed residents interested in employment are over the age of 45, compared to 47.4% for the employed population. See Table 24.

TABLE 24: Age Distribution of Not-Employed Residents Interested In Employment

Source: YA Household Survey, August-September 2007

Age	Percentage	Number
18-24	9.0%	8,397
25-34	14.8%	13,830
35-44	13.2%	12,348
45-54	18.5%	17,287
55-64	21.7%	20,251
65-74	22.8%	21,239
Total	100%	93,352

- The top reason why not-employed residents interested in employment are not working is that they are retired. This is followed by an inability to find a suitable job and other unspecified reasons. See Table 25.

TABLE 25: Reasons for Non-Employment among Residents Not in the Workforce* but Interested in Employment

Source: YA Household Survey, August-September 2007

Reason Not Working	Percentage	Number
Retired	50.5%	47,112
Can't find a suitable job	18.2%	17,013
Other	14.5%	13,523
Raising a family	6.1%	5,671
Attending school	3.7%	3,490
Not looking for employment	3.7%	3,490
Disabled	3.3%	3,054
Total	100%	93,353

** Explains the reasons these residents are not working*

- 61.8% of the area's not-employed residents who are interested in working do not have a limitation to entering the workforce. Table 26 shows those limitations residents have that will affect what types of positions they are able to hold. Among those that do have a limitation, the most frequently mentioned (10.9%) is lack of jobs in their field of education/training. The second most common limitation (8.9%) is childcare needs.

TABLE 26: Limitations to Working among Residents Not in the Workforce* but Interested in Employment
Source: YA Household Survey, August-September 2007

Limitation	Percentage **	Number
No Limitations	61.8%	57,658
Lack of jobs in your field of education/training	10.9%	10,167
Childcare needs	8.9%	8,318
A disability	8.8%	8,237
Lack of transportation	8.8%	8,237
Other	2.0%	1,830
Lack of alternative work arrangements	1.1%	1,026

* Explains what limitations to working these residents face

** Total exceeds 100% due to multiple responses

- The occupational skill base of the county’s not-employed residents who are interested in working is somewhat diverse. Table 27 outlines the largest occupational skill groups within this sector of the population. As shown, *education–professional, office & administrative support, and financial skills* constitute the largest skill categories, accounting for 8.1%, 8.1%, and 7.7%, respectively, of the not-employed-but-interested labor base.

TABLE 27: Leading Occupational Skills of Residents Not in the Workforce but Interested in Employment
Source: YA Household Survey, August-September 2007

Occupational Skills	Percentage	Number
Education – Professional	8.1%	7,593
Office & Administrative Support	8.1%	7,593
Financial	7.7%	7,146
Food Preparation & Serving	5.7%	5,360
Retail Sales & Service	5.7%	5,360
Healthcare – Professional	4.8%	4,467
Business/Professional Services	4.3%	4,020
Construction	4.3%	4,020
Customer Services	4.3%	4,020

15. **A majority of the county’s not-employed residents interested in employment would like to receive job training.** In total, 76,820 not-employed residents interested in working would like additional training. See Table 28. Refer to Exhibit C-4 for those fields in which all residents would like to receive training. As shown in that table, the training most desired falls within the following categories: “any training,” medical-related (except nursing), computer- general, nursing, and business.

TABLE 28: Job Training Interest among Not-Employed Residents Interested in Employment

Source: YA Household Survey, August-September 2007

Interest	Percentage	Number
Interested in job training	82.3%	76,820
Not interested in job training	17.7%	16,531
Total	100%	93,351

- Education levels among not-employed residents interested in working are moderate to strong, with 88% of respondents reporting a high school diploma/GED or higher. However, compared to similar projects WDG has conducted across the country, there is a relatively high percentage of residents (23.1%) with some college, but no degree. Almost 22% of the residents interested in employment have bachelor’s degrees or higher, and over 10% of residents report having graduate degrees. There appears to be a pool of educated residents that are presently not employed and potentially available for suitable employment opportunities. (See Table 29.)

TABLE 29: Educational Attainment of Not-Employed Residents Interested in Employment

Source: YA Household Survey, August-September 2007

Highest Grade Level Completed	Percentage	Number
8th grade or lower	2.3%	2,161
Some high school	9.7%	9,076
High school graduate or equivalent	30.6%	28,524
Some technical or vocational school	0.9%	864
Some college, no degree	23.1%	21,609
Technical/Vocational certificate	4.2%	3,890
Associates degree	7.4%	6,915
Bachelors degree	10.2%	9,508
Postgraduate study, but no degree	1.4%	1,297
Graduate degree	10.2%	9,508
Total	100%	93,352

16. **New and expanding employers also would rely heavily on another element of the hidden labor force: the area’s already-employed residents, particularly the underemployed.** Approximately 43,328 (16.4%) currently employed residents consider themselves underemployed, i.e., qualified for better positions than they currently hold because of experience, training, or education. See the demographic profile on underemployed residents in Appendix C-3 for additional details on the underemployed component of the workforce. As can be seen in Tables 30 and 31, the underemployed component of the workforce is young to middle age (62.9% between the ages of 35 and 54 years), is well educated, and has management or office and administrative support skills.
- Among underemployed residents, over 75% are between the ages of 25 and 54, indicating a strong pool of workers who would welcome improved job opportunities. See Table 30.

TABLE 30: Age Distribution of Underemployed Residents*Source: YA Household Survey, August-September 2007*

Age	Percentage	Number
18-24	2.9%	1,238
25-34	14.3%	6,190
35-44	32.9%	14,236
45-54	30.0%	12,998
55-64	14.3%	6,190
65-74	5.7%	2,476
Total	100%	43,328

- The underemployed residents are well educated. 95.8% have at least a high school diploma, while 66.2% have a high school diploma and some post-secondary training less than a four-year degree. A relatively high concentration (29.6%) of underemployed residents have a four-year college degree or higher. See Table 31.

TABLE 31: Educational Attainment of Underemployed Residents*Source: YA Household Survey, August-September 2007*

Highest Grade Level Completed	Percentage	Number
8th grade or lower	1.4%	610
Some high school	2.8%	1,220
High school graduate or equivalent	21.1%	9,154
Some technical or vocational school	1.4%	610
Some college, no degree	23.9%	10,374
Technical/Vocational certificate	8.5%	3,661
Associates degree	11.3%	4,882
Bachelors degree	21.1%	9,154
Postgraduate study, but no degree	0.0%	0
Graduate degree	8.5%	3,661
Total	100%	43,326

- The occupational skill base of the area's underemployed residents is diverse. Table 32 outlines the largest occupational skill groups within this sector of the population. As shown, *upper management*, *office and administrative support*, *entry-level management*, and *retail sales and service* skills constitute the largest categories of skills, accounting for 14.1%, 9.9%, 8.5%, and 8.5% respectively, of the underemployed skills base.

TABLE 32: Leading Occupational Skills of Underemployed Residents

Source: YA Household Survey, August-September 2007

Occupational Skills	Percentage	Number
Management – Upper	14.1%	6,102
Office & Administrative Support	9.9%	4,272
Management – Entry Level	8.5%	3,661
Retail Sales & Service	8.5%	3,661
Customer Services	7.0%	3,051
Management – Middle	7.0%	3,051
Cleaning & Maintenance	5.6%	2,441

17. **Many of the county’s employed residents would like to enhance their job skills through training.** Returns from Younger Associates’ residential survey show that 45.5% of employed residents would be interested in receiving training to acquire new job skills for career development, which amounts to roughly 119,986 residents (see Table 33). These individuals would offer a potential workforce for existing and new companies offering career advancement and training opportunities. Refer to Exhibit C-2 for those disciplines in which the employed would like to receive training. The five top fields in which training is desired are general computer, business, medical-related (except nursing), “any,” and education-related.

TABLE 33: Job Training Interest among Employed Residents

Source: YA Household Survey, August-September 2007

Interest	Percentage	Number
Interested in job training	45.5%	119,986
Not interested in job training	54.5%	143,637
Total	100%	263,623

18. **Both underemployed and not-employed residents interested in working prefer to travel less than 45 minutes for employment opportunities.** The not-employed report an openness to longer commute durations. (See Table 34.)

TABLE 34: Maximum Commute Times Desired by Not-Employed Residents Interested in Employment

Source: YA Household Survey, August-September 2007

Maximum Commute Time	Prevailing Commute Pattern of the Employed		Maximum Desired Commute Times			
			Underemployed		Not Employed but Interested	
	%	#	%	#	%	#
Less than 15 minutes	30.3%	79,834	24.6%	10,654	21.0%	19,559
15-29 minutes	31.4%	82,705	34.4%	14,916	35.2%	32,895
30-44 minutes	15.7%	41,353	19.7%	8,523	26.7%	24,894
45-59 minutes	6.5%	17,230	4.9%	2,131	10.5%	9,780
1 hour to 1 hour, 29 minutes	3.9%	10,338	3.3%	1,421	3.8%	3,556
1 hour, 30 minutes or more	1.1%	2,872	1.6%	710	1.9%	1,778

Labor Demand

1. **Survey results show that the demand for workers will increase over the next year.** Among companies responding to WDG's employer survey, 61.4% plan to expand their workforce over the next year, including 23.9% expanding by 2% or less, 21.2% expanding between 2% and 5%, and 16.3% expanding by 5% or more. 28.8% of responding employers—a relatively high number based upon WDG's experience—report no growth over the next year, and 9.8% of employers anticipate workforce reductions. See Exhibit B-1 in Appendix B, page 1.
2. **Currently, the occupations in greatest demand by local employers that responded to the survey are registered nurses, licensed practical nurses, administrative assistants, and call center agents/representatives.** These are followed by experienced management, accounting clerks/bookkeepers, customer service representatives, and elementary-school teachers.
 - Table 35 compares the occupations currently in greatest demand compared to their availability. A level of imbalance between availability and demand is shown for each occupation. The level of education or training needed for each occupation is also shown.
 - Comparing the current demand for workers against current availability previously indicates there are **critical labor shortages** for the following occupations: licensed practical nurses; registered nurses; and elementary and secondary-school teachers.
 - Also indicated is a **general imbalance** between labor demand and supply for the following occupations: experienced management; medical assistants; physical therapists; radiological technologists; respiratory therapists; sales representatives; CNC machine operators; electrical and electronic repairers; inspectors, testers and sorters; and maintenance mechanics.
 - There is a **modest imbalance** for the following occupations: accounting clerks/bookkeepers; call center agents/representatives; clerical workers with advanced computer skills; customer service representatives; lab technicians; welders; computer software engineers; and systems analysts.

TABLE 35: Top Occupations/Positions Currently In Demand by Responding Surveyed Local Employers
Source: WDG Employer Survey, August-September 2007; U.S. Bureau of Labor Statistics
(X=modest imbalance; XX=imbalance; XXX=high imbalance)*

Current Labor Demand	Demand		Supply Rating (5=plentiful; 1=unavailable)			Most Significant Source of Post-secondary Education or Training (2)
	Employer Responses (1)	# of Required Applicants	Average Score	Median Score	Imbalance*	
General Business and Office Support						
Accounting clerks/bookkeepers	84	72	3.3	3.0	X	Moderate on-the-job training
Administrative assistants	80	81	3.3	3.5	-	Moderate on-the-job training
Call center agent/representative	44	75	3.1	3.0	X	Short on-the-job training
Clerical workers with advanced computer skills	73	34	2.9	3.0	X	N/A
Customer service representatives	59	65	3.3	3.0	X	Moderate on-the-job training
Office clerks	58	38	3.0	3.0	-	Short on-the-job training
Management and Supervisory						
Construction supervisors	47	23	2.7	3.0	-	Work exp. in related occupation
General & operations managers	48	21	2.7	3.0	-	Bachelor's plus experience
Management trainees	31	7	2.3	2.0	-	N/A
Management, experienced	58	74	2.6	3.0	XX	N/A
Production supervisors	35	9	2.4	3.0	-	Work exp. in related occupation
Purchasing agent	35	4	2.3	2.0	-	Work exp. In related occupation
Technical and Professional						
Accountants/auditors	44	42	3.0	3.0	-	Bachelors degree
CAD drafters	37	11	2.1	2.0	-	Postsecondary vocational award
Engineering technicians	29	8	2.0	2.0	-	Associates degree
Engineers	35	12	2.1	2.0	-	Bachelors degree
Financial analysts/advisors	22	9	2.3	2.0	-	Bachelors degree
Lab Technicians	18	4	1.8	1.0	X	Associates degree
Medical assistants	20	24	1.8	1.0	XX	Moderate on-the-job training
Medical secretaries	15	1	1.5	1.0	-	Postsecondary vocational award
Nurses, licensed practical	21	86	1.6	1.0	XXX	Postsecondary vocational award
Nurses, registered	22	202	1.5	1.0	XXX	Associates degree
Pharmacy technicians	14	2	1.4	1.0	-	Moderate on-the-job training
Physical therapists	16	10	1.1	1.0	XX	Masters degree
Radiological technologists	16	4	1.4	1.0	XX	Associates degree
Respiratory therapists	13	5	1.1	1.0	XX	Associates degree
Sales representatives	35	47	2.2	2.0	XX	Moderate on-the-job training
Scientists (general)	16	1	1.6	1.0	-	Bachelors degree
Teachers, elementary	15	50	1.8	1.0	XXX	Bachelors degree
Teachers, secondary	15	25	1.8	1.0	XXX	Bachelors degree
Technicians (general)	23	6	2.0	2.0	-	N/A

TABLE 35 (continued): Top Occupations/Positions Currently In Demand by Responding Surveyed Local Employers
 Source: WDG Employer Survey, August-September 2007; U.S. Bureau of Labor Statistics
 (X=modest imbalance; XX=imbalance; XXX=high imbalance*)

Current Labor Demand	Demand		Supply Rating (5=plentiful; 1=unavailable)			Most Significant Source of Post-secondary Education or Training (2)
	Employer Responses (1)	# of Required Applicants	Average Score	Median Score	Imbalance*	
Production, Maintenance, and Distribution						
Bench assemblers	19	1	2.2	2.0	-	Moderate on-the-job training
Building and construction workers	34	20	2.9	3.0	-	Short on-the-job training
CNC machine operators	16	12	1.6	1.0	XX	Moderate on-the-job training
Electrical and electronic repairers	28	38	2.1	2.0	XX	Postsecondary vocational award
Inspectors, testers & sorters	15	4	1.7	1.0	XX	Moderate on-the-job training
Machine operators, no setup	19	2	2.0	2.0	-	N/A
Maintenance mechanics	27	36	2.0	2.0	XX	Moderate on-the-job training
Shipping & receiving	29	7	2.4	2.0	-	N/A
Skilled machine trades (general)	21	7	1.8	2.0	-	N/A
Welders	20	6	1.9	1.5	X	Long on-the-job training
Computer and Information Systems						
Computer operators	18	1	2.1	1.0	-	Moderate on-the-job training
Computer security specialists	16	1	1.9	1.0	-	Associates degree
Computer software engineers	24	7	1.7	1.0	X	Bachelors degree
Computer support specialists, technicians	34	14	2.5	2.5	-	Associates degree
Database administrators	23	2	2.1	2.0	-	Bachelors degree
Internet development specialists	18	1	1.7	1.0	-	N/A
Network systems administrators	25	3	2.2	2.0	-	Bachelors degree
Network technicians	26	1	2.1	2.0	-	N/A
Programmers/analysts	25	9	2.0	2.0	-	Bachelors degree
Systems analysts	22	7	2.0	1.5	X	Bachelors degree
Webmasters	21	1	2.1	1.0	-	N/A

(1) Among survey responding employees. The actual total number needed would be higher.

(2)Source: U.S. Bureau of Labor Statistics

*degree of Imbalance	Applicants Required	Average Score	Median Score
X = Modest Imbalance	50+	3.0-3.3	3.0
	25-49	2.5-2.9	3.0
	15-24	2.0-2.4	2.0-2.5
	3-14	1.5-2.0	Less than 2.0
XX = Imbalance	50+	2.5-2.9	2.5-3.0
	25-49	2.0-2.4	2.0-2.5
	15-24	Less than 2.0	Less than 2.0
	3-14	Less than 1.5	Less than 2.0
XXX = High Imbalance	50+	Less than 2.5	Less than 2.5
	25-49	Less than 2.0	Less than 2.0

3. **In one year, the demand for call center representatives, nurses, and teachers will continue.** Among the survey responding employers, there is a strong need for call center agent/representatives (379), registered nurses (292), elementary-school teachers (203), secondary-school teachers (203), customer service representatives (171), licensed practical nurses (154), clerical workers with advanced computer skills (149), computer support specialists, technicians (119), and office clerks (117), among others. The anticipated occupational demands are presented in Table 36 below.
- Comparing the twelve-month demand for workers against current availability indicates **critical labor shortages** for the following occupations: medical assistants; licensed practical nurses; registered nurses; sales representatives; elementary-school teachers; secondary-school teachers; and electric and electronic repairers.
 - There also is a **general imbalance** between labor demand and supply for the following occupations: clerical workers with advanced computer skills; experienced management; lab technicians; medical records technicians; pharmacy technicians; physical therapists; radiological technologists; respiratory therapists; building and construction workers; shipping and receiving; and computer support specialists, technicians.
 - A **modest imbalance** is indicated for the following occupations: accounting clerks/bookkeepers; call center agents/representatives; claims processing clerks; customer service representatives; office clerks; construction supervisors; general and operations managers; medical secretaries; general scientists; general technicians; inspectors, testers and sorters; maintenance mechanics; welders; computer security specialists; computer software engineers; and systems analysts.

TABLE 36: Anticipated Demand for Workers in One Year by Responding Surveyed Local Employers
 Source: WDG Employer Survey, August-September 2007; U.S. Bureau of Labor Statistics
 (X=modest imbalance; XX=imbalance; XXX=high imbalance*)

Current Labor Demand	Demand		Supply Rating (5=plentiful; 1=unavailable)			Most Significant Source of Post-secondary Education or Training (2)
	Employer Responses (1)	# of Required Applicants	Average Score	Median Score	Imbalance*	
General Business and Office Support						
Accounting clerks/bookkeepers	84	82	3.3	3.0	X	Moderate on-the-job training
Administrative assistants	80	86	3.3	3.5	-	Moderate on-the-job training
Call center agent/representative	44	379	3.1	3.0	X	Moderate on-the-job training
Claims processing clerks	28	34	2.5	3.0	X	Moderate on-the-job training
Clerical workers with advanced computer skills	73	149	2.9	3.0	XX	N/A
Customer service representatives	59	171	3.3	3.0	X	Moderate on-the-job training
Office clerks	58	117	3.0	3.0	X	Short on-the-job training
Management and Supervisory						
Construction supervisors	47	43	2.7	3.0	X	Work exp. In related occupation
General & operations managers	48	25	2.7	3.0	X	Bachelors plus experience
Management trainees	31	12	2.3	2.0	-	N/A
Management, experienced	58	65	2.6	3.0	XX	N/A
Production supervisors	35	23	2.4	3.0	-	Work exp. In related occupation
Purchasing agent	35	8	2.3	2.0	-	Work exp. in related occupation

TABLE 36 (continued): Anticipated Demand for Workers in One Year by Responding Surveyed Local Employers
Source: WDG Employer Survey, August-September 2007; U.S. Bureau of Labor Statistics
(X=modest imbalance; XX=imbalance; XXX=high imbalance)*

Current Labor Demand	Demand		Supply Rating (5=plentiful; 1=unavailable)			Most Significant Source of Post-secondary Education or Training (2)
	Employer Responses (1)	# of Required Applicants	Average Score	Median Score	Imbalance*	
Technical and Professional						
Accountants/auditors	44	40	3.0	3.0	-	Bachelors degree
CAD drafters	37	12	2.1	2.0	-	Postsecondary vocational award
Engineering technicians	29	6	2.0	2.0	-	Associates degree
Engineers	35	11	2.1	2.0	-	Bachelors degree
Financial analysts/advisors	22	4	2.3	2.0	-	Bachelors degree
Lab technicians	18	11	1.8	1.0	XX	Associates degree
Medical assistants	20	41	1.8	1.0	XXX	Moderate on-the-job training
Medical/clinical lab technologists	14	1	1.4	1.0	-	Bachelors degree
Medical records technicians	15	10	1.9	1.0	XX	Associates degree
Medical secretaries	15	6	1.5	1.0	X	Postsecondary vocational award
Nurses, licensed practical	21	154	1.6	1.0	XXX	Postsecondary vocational award
Nurses, registered	22	292	1.5	1.0	XXX	Associates degree
Pharmacy technicians	14	8	1.4	1.0	XX	Moderate on-the-job training
Physical therapists	16	23	1.1	1.0	XX	Masters degree
Radiological technologists	16	7	1.4	1.0	XX	Associates degree
Respiratory therapists	13	17	1.1	1.0	XX	Associates degree
Sales representatives	35	58	2.2	2.0	XXX	Moderate on-the-job training
Scientists (general)	16	4	1.6	1.0	X	Bachelors degree
Teachers, elementary	15	203	1.8	1.0	XXX	Bachelors degree
Teachers, secondary	15	203	1.8	1.0	XXX	Bachelors degree
Technicians (general)	23	17	2.0	2.0	X	N/A
Production, Maintenance, and Distribution						
Bench assemblers	19	8	2.2	2.0	-	Moderate on-the-job training
Building and construction workers	34	64	2.9	3.0	XX	Short on-the-job training
CNC machine operators	16	2	1.6	1.0	-	Moderate on-the-job training
Electric and electronic repairers	28	54	2.1	2.0	XXX	Postsecondary vocational award
Inspectors, testers & sorters	15	3	1.7	1.0	X	Moderate on-the-job training
Machine operators, no setup	19	8	2.0	2.0	-	N/A
Machinists/manufacturing mechanics	16	1	1.6	1.0	-	Long on-the-job training
Maintenance mechanics	27	24	2.0	2.0	X	Moderate on-the-job training
Shipping & receiving	29	34	2.4	2.0	XX	N/A
Skilled machine trades (general)	21	7	1.8	2.0	-	N/A
Welders	20	9	1.9	1.5	X	Long on-the-job training

TABLE 36 (continued): Anticipated Demand for Workers in One Year by Responding Surveyed Local Employers
 Source: WDG Employer Survey, August-September 2007; U.S. Bureau of Labor Statistics
 (X=modest imbalance; XX=imbalance; XXX=high imbalance*)

Current Labor Demand	Demand		Supply Rating (5=plentiful; 1=unavailable)			Most Significant Source of Post-secondary Education or Training (2)
	Employer Responses (1)	# of Required Applicants	Average Score	Median Score	Imbalance*	
Computer and Information Services						
Computer operators	18	6	2.1	1.0	-	Moderate on-the-job training
Computer security specialists	16	5	1.9	1.0	X	Associates degree
Computer software engineers	24	4	1.7	1.0	X	Bachelors degree
Computer support specialists, technicians	34	119	2.5	2.5	XX	Associates degree
Database administrators	23	3	2.1	2.0	-	Bachelors degree
Network systems administrators	25	8	2.2	2.0	-	Bachelors degree
Network technicians	26	7	2.1	2.0	-	N/A
Programmers/analysts	25	12	2.0	2.0	-	Bachelors degree
Systems analysts	22	7	2.0	1.5	X	Bachelors degree
Webmasters	21	1	2.1	1.0	-	N/A

(1) Among survey responding employees. The actual total number needed would be higher.

(2) Source: U.S. Bureau of Labor Statistics

*degree of Imbalance	Applicants Required	Average Score	Median Score
X = Modest Imbalance	50+	3.0-3.3	3.0
	25-49	2.5-2.9	3.0
	15-24	2.0-2.4	2.0-2.5
	3-14	1.5-2.0	Less than 2.0
XX = Imbalance	50+	2.5-2.9	2.5-3.0
	25-49	2.0-2.4	2.0-2.5
	15-24	Less than 2.0	Less than 2.0
	3-14	Less than 1.5	Less than 2.0
XXX = High Imbalance	50+	Less than 2.5	Less than 2.5

4. **Significantly, many of the WDG-YA surveyed residents would like training or have experience in the occupational fields in which there is an imbalance (high and general imbalances) between demand and supply.** This favorable situation means that there is a potential workforce resident in the area that could be recruited or developed for the skills that will be in short supply. Table 37 shows the occupations that will be imbalanced in one year and the number of residents in the area that have a background in those occupations or have a desire to be trained. It also shows the level of training needed for each occupation, according the U.S. Bureau of Labor Statistics.

TABLE 37: Surveyed Employer Twelve-Month Labor Demand and Hidden Labor Force Supply

Source: WDG Employer Surveys, August-September 2007; YA Residential Survey, August-September 2007

Occupations in Supply/Demand Imbalance in Twelve Months	Number of Required Applicants (1)	Number of Residents with Previous or Current Work Experience		Number of Residents with Desire for Training		Most Significant Source of Postsecondary Education or Training (2)
		Not Employed but Interested	Underemployed Area Specialized Training	Not Employed but Interested	All Employed, Including Underemployed	
High Imbalance (XXX)						-
Registered nurses	292	2,234*	956*	2,183*	3,305*	Associates degree
Elementary school teachers	203	3,797**	319**	1,310**	4,322**	Bachelors degree
Secondary school teachers	203	3,797**	319**	1,310**	4,322**	Bachelors degree
Licensed practical nurses	154	2,234*	956*	2,183*	3,305*	Postsecondary vocational award
Sales representative	58	447	1,274	2,619	3,050	Moderate on-the-job training
Electric and electronic repairers	54	N/A	N/A	0	2,542	Postsecondary vocational award
Medical assistants	41	N/A	1,911	N/A	N/A	
Imbalance (XX)						
Clerical wrkrs (w/ adv computer skills)	149	N/A	N/A	2,619	4,576	N/A
Computer support specialists/techs	119	893	637	8,730	12,710	Associates degrees
Building & construction workers	64	4,020	5,734	2,619	1,525	Short on-the-job training
Experienced management	58	893	N/A	N/A	N/A	N/A
Shipping & receiving	34	1,340	0	N/A	N/A	N/A
Physical therapists	23	N/A	N/A	N/A	N/A	Masters degrees
Respiratory therapists	17	N/A	N/A	N/A	N/A	Associates degrees
Lab technicians	11	N/A	N/A	N/A	N/A	Associates degrees
Medical records technicians	10	N/A	N/A	N/A	N/A	Associates degrees
Pharmacy technicians	8	N/A	N/A	N/A	N/A	Moderate on-the-job training
Radiological technicians	7	N/A	N/A	N/A	N/A	Associates degree

(1) Among survey responding employees. The actual total number needed would be higher.

(2) Source: U.S. Bureau of Labor Statistics

*Nursing: response evenly divided into registered and licensed practical nurses.

**Education: response evenly divided into elementary school and secondary school teachers.

5. **Responding employers report that, on average, 7.3% of currently employed workers are presently eligible for retirement, or will become eligible for retirement over the next five years.** This equates to approximately 20,070 employees eligible to retire over the next five years, based on Lee County's employment of 274,933 workers (2006 annual average).
- As seen in Table 38, the highest numbers of companies with employees eligible for retirement are in administrative, management, supervisory, sales, customer service, and customer service occupations. Employers have a high level of confidence that they will be able to fill these positions.
 - 50% or more of responding employers were not confident or were unsure whether they will be able to fill twelve occupations when their employees retire, including: medical assistants; registered nurses; maintenance; supervisors; building and construction workers; carpenters; electricians; engineering technicians; managers; operations; physicians; and general technicians.

TABLE 38: Most Common Occupations Projected For Retirement and Employer's Confidence in Their Ability to Fill These Positions*

Source: WDG Employer Survey, August-September 2007

Occupation Category	Total	Confidence Level for Finding Replacements							
		Number of Responses				Percent of Responses			
		No	Not Sure	Yes	No Rating	No	Not Sure	Yes	No Rating
Administrative assistants	17	1	1	15	-	5.9%	5.9%	88.2%	-
Management-experienced	17	-	4	13	-	-	23.5%	76.5%	-
Management	13	-	3	10	-	-	23.1%	76.9%	-
Sales Representatives	13	-	3	10	-	-	23.1%	76.9%	-
Customer Service Representative	12	3	-	9	-	25.0%	-	75.0%	-
Construction supervisor	10	1	-	9	-	10.0%	-	90.0%	-
General & Operations Managers	9	-	2	7	-	-	22.2%	77.8%	-
Office Clerks	8	-	-	8	-	-	-	100%	-
Clerical w/advanced computer skills	7	-	5	2	-	-	71.4%	28.6%	-
Production supervisors	7	2	-	5	-	28.6%	-	71.4%	-
Accounting clerks	6	-	-	6	-	-	-	100%	-
Clerical workers	6	-	2	4	-	-	33.3%	66.7%	-
Administrative	5	-	-	4	1	-	-	80.0%	20.0%
Engineer	4	-	1	2	1	-	25.0%	50.0%	25.0%
Engineers	4	-	1	3	-	-	25.0%	75.0%	-
Medical assistants	4	-	2	2	-	-	50.0%	50.0%	-
Nurses, Registered	4	2	2	-	-	50.0%	50.0%	-	-
Accounting clerks/bookkeepers	3	-	-	3	-	-	-	100%	-
Administration	3	-	-	3	-	-	-	100%	-
Call Center Agents/Representatives	3	-	-	3	-	-	-	100%	-
Construction worker	3	-	-	3	-	-	-	100%	-
Estimator	3	1	-	2	-	33.3%	-	66.7%	-
Maintenance	3	2	-	1	-	66.7%	-	33.3%	-
Radiological technologists	3	-	-	3	-	-	-	100%	-
Supervisors	3	1	1	1	-	33.3%	33.3%	33.3%	-
Teachers	3	1	-	2	-	33.3%	-	66.7%	-
Technicians	3	-	1	2	-	-	33.3%	66.7%	-
Building & construction worker	2	1	-	1	-	50.0%	-	50.0%	-
Carpentry	2	-	1	1	-	-	50.0%	50.0%	-
Courier	2	-	-	2	-	-	-	100%	-
Drivers	2	-	-	2	-	-	-	100%	-
Electricians	2	1	-	1	-	50.0%	-	50.0%	-
Engineering technicians	2	-	1	1	-	-	50.0%	50.0%	-
Equipment operator	2	-	-	2	-	-	-	100%	-
Faculty	2	-	-	2	-	-	-	100%	-
Managers	2	2	-	-	-	100%	-	-	-

TABLE 38 (continued): Most Common Occupations Projected For Retirement and Employer's Confidence in Their Ability to Fill These Positions*

Source: WDG Employer Survey, August-September 2007

Occupation Category	Total	Confidence Level for Finding Replacements							
		Number of Responses				Percent of Responses			
		No	Not Sure	Yes	No Rating	No	Not Sure	Yes	No Rating
Mechanics	2	-	-	2	-	-	-	100%	-
Operations	2	1	-	-	1	50.0%	-	-	50.0%
Physicians	2	1	1	-	-	50.0%	50.0%	-	-
Production workers	2	-	-	2	-	-	-	100%	-
Receptionist	2	-	-	2	-	-	-	100%	-
Surveyor	2	-	-	-	2	-	-	-	100%
Technicians-general	2	-	1	1	-	-	50.0%	50.0%	-
Total	208	20	32	151	5	9.6%	15.4%	72.6%	2.4%

* Containing a total of two or more retiring employees

6. **If Lee County is to maintain and attract knowledge-based and technology-focused industries, it must be able to provide the requisite skill sets.** The U.S. Bureau of Labor Statistics identified the technology-based skills that will be in the greatest demand in the country between 2004 and 2014. If Lee County is to gain in its attractiveness for technology-focused operations, these occupations will need to be provided locally and must be recruitable from outside the area. See Table 39.

TABLE 39: Top U.S. Technical Occupations by Rate of Projected Growth 2004-2014

Source: U.S. Bureau of Labor Statistics; Institute of Electrical and Electronic Engineers

Occupation	U.S. Change		Most Significant Source of Post-Secondary Education or Training
	Number (000's)	Percent	
Network systems & data communications analysis	126	54.6%	Bachelor's degree
Computer software engineers, applications	222	48.4%	Bachelor's degree
Computer software engineers, systems software	146	43.0%	Bachelor's degree
Network & computer systems administrators	107	38.4%	Bachelor's degree
Database administrators	40	38.2%	Bachelor's degree
Computer systems analysts	153	31.4%	Bachelor's degree
Biomedical engineers	3	30.7%	Bachelor's degree
Environmental engineers	15	30.0%	Bachelor's degree
Personal financial advisors	41	25.9%	Bachelor's degree
Actuaries	4	23.2%	Bachelor's degree or higher, plus work experience
Accountants and auditors	264	22.4%	Bachelor's degree
Financial analysts	34	17.3%	Bachelor's degree
Engineers, all	195	13.4%	Bachelor's degree or higher
Engineering managers	25	13.0%	Bachelor's degree or higher, plus work experience
Architects & engineers	315	12.5%	Bachelor's degree or higher
Electrical engineers	18	11.8%	Bachelor's degree
Computer hardware engineers	8	10.1%	Bachelor's degree
Electronics engineers, except computer	14	9.7%	Bachelor's degree

7. **Non-technically-focused occupations also will be needed locally to meet the needs of a growth economy.** According to the U.S. Bureau of Labor Statistics, there are many occupations that will be in high demand by general industry between 2004 and 2014. Although all of these may not be needed as strongly in Lee County, many will. It is the challenge of the area to provide the training needed for such skills to sustain general economic growth. These occupations are listed in Tables 40 and 41, and can be used to supplement the data gathered from the WDG/YA surveys. They are listed by the fastest growing and those that are forecasted to grow the most numerically. Interestingly, most of the high-growth jobs require only a high school diploma or up to two years of post-secondary education.

TABLE 40: Fastest-Growing U.S. Occupations by Rate of Projected Growth 2004-2014

Source: U.S. Bureau of Labor Statistics

Occupation	U.S. Change 2004-2014		Most Significant Source of Post-Secondary Education or Training
	Number (000's)	Percent	
Home health aides	350	56.0%	Short-term on-the-job training
Network systems and data communications analysts	126	55.0%	Bachelor's degree
Medical assistants	202	52.0%	Moderate-term on-the-job training
Physician assistants	31	50.0%	Bachelor's degree
Computer software engineers, applications	222	48.0%	Bachelor's degree
Physical therapist assistants	26	44.0%	Associate degree
Dental hygienists	68	43.0%	Associate degree
Computer software engineers, systems software	146	43.0%	Bachelor's degree
Dental assistants	114	43.0%	Moderate-term on-the-job training
Personal and home care aides	287	41.0%	Short-term on-the-job training
Network and computer systems administrators	107	38.4%	Bachelor's degree
Database administrators	40	38.2%	Bachelor's degree
Physical therapists	57	36.7%	Master's degree
Forensic science technicians	4	36.4%	Associate degree
Veterinary technologists and technicians	21	35.3%	Associate degree
Diagnostic medical sonographers	15	34.8%	Associate degree
Physical therapist aides	15	34.4%	Short-term on-the-job training
Occupational therapist assistants	7	34.1%	Associate degree
Medical scientists, except epidemiologists	25	34.1%	Doctoral degree
Occupational therapists	31	33.6%	Master's degree

TABLE 41: Fastest-Growing U.S. Occupations by Numeric Increase 2004-2014

Source: U.S. Bureau of Labor Statistics

Occupation	U.S. Change		Most Significant Source of Post-Secondary Education or Training
	Number (000's)	Percent	
Retail salespersons	736	17.0%	Short-term on-the-job training
Registered nurses	703	29.0%	Associate degree
Postsecondary teachers	524	32.0%	Doctoral degree
Customer service representatives	471	23.0%	Moderate-term on-the-job training
Janitors and cleaners, except maids and housekeeping cleaners	440	19.0%	Short-term on-the-job training
Waiters and waitresses	376	17.0%	Short-term on-the-job training
Combined food preparation and serving workers, incl. fast food	367	17.0%	Short-term on-the-job training
Home health aides	350	56.0%	Short-term on-the-job training
Nursing aides, orderlies, and attendants	325	22.0%	Postsecondary vocational award
General and operations managers	308	17.0%	Bachelor's degree or higher, plus work experience
Personal and home care aides	287	41.0%	Short-term on-the-job training
Elementary school teachers, except special education	265	18.2%	Bachelor's degree

TABLE 41 (continued): Fastest-Growing U.S. Occupations by Numeric Increase 2004-2014

Source: U.S. Bureau of Labor Statistics

Occupation	Change		Most Significant Source of Post-Secondary Education or Training
	Number (000's)	Percent	
Accountants and auditors	264	22.4%	Bachelor's degree
Office clerks, general	263	8.4%	Short-term on-the-job training
Laborers and freight, stock, and material movers, hand	248	10.2%	Short-term on-the-job training
Receptionists and information clerks	246	21.7%	Short-term on-the-job training
Landscaping and groundskeeping workers	230	19.5%	Short-term on-the-job training
Truck drivers, heavy and tractor-trailer	223	12.9%	Moderate-term on-the-job training
Computer software engineers, applications	222	48.4%	Bachelor's degree
Maintenance and repair workers, general	202	15.2%	Moderate-term on-the-job training

Labor Quality

- Employers report that the level of basic skills seen among job applicants is slightly unsatisfactory.** As seen in Table 42, the *median* score (on a five-point scale where 1=poor and 5=excellent) for five basic skills included in the WDG employer survey was 3.0 (i.e., satisfactory), while written communications received a median score of 2.0.

 - The *average* ratings, however, indicate that employers in the area view overall basic skills, verbal communication/comprehension, reading comprehension, math, thinking and judgment/problem solving, and written communications as slightly unsatisfactory (average score of 2.3 to 2.9).
 - Team and cooperative skills received the highest rating among surveyed employers of all the job skills. This skill set received a nearly satisfactory rating, with a median score of 3.0 and an average score of 2.9.
- Surveyed employers report satisfactory work ethic and productivity among their employees, though employer interviews generally indicate the need for improvement.** Workforce quality ratings ranged from satisfactory to above satisfactory, with overall employer/employee relations receiving the highest rating (median score of 4.0 and average score of 3.5). (See Table 42.)

TABLE 42: Employer Ratings on Labor-Quality Measures

Source: WDG Employer Survey, Summer/Fall 2007 (1=Poor; 5=Excellent)

Basic Skills of Job Applicants	Average	Median
Team and cooperative skills	2.9	3.0
Overall basic skills of all applicants	2.8	3.0
Verbal communication/comprehension	2.6	3.0
Reading comprehension	2.5	3.0
Math	2.5	3.0
Thinking and judgment/problem solving	2.5	3.0
Written communication	2.3	2.0

TABLE 42 (continued): Employer Ratings on Labor-Quality Measures*Source: WDG Employer Survey, Summer/Fall 2007 (1=Poor; 5=Excellent)*

Productivity and Work Ethic of Employees	Average	Median
Work ethic	3.1	3.0
Productivity	3.1	3.0
Productivity compared to that of company's other sites	3.1	3.0
Willingness to work overtime	3.4	3.0
Punctuality	3.1	3.0
Overall employer/employee relations	3.5	4.0

3. **Turnover rates for newly hired workers and for employees after the first year are low relative to rates typically seen by WDG in similarly-sized communities.** The employer-reported average turnover rate for new hires is 10% or less, and the average turnover rate for workers after the first year of employment falls to 5% or less. The average daily absenteeism rate for responding employers is below 5%.

Education and Training

1. **Within the county are a variety of post-secondary educational institutions offering certificate, associate's, bachelor's, and master's degree programs.** In 2006, these institutions combined had 22,089 enrollees and graduated 4,236 students. (Refer to Table 43.)

TABLE 43: Graduation and Enrollment at Regional Post-Secondary Schools*Source: U.S. Department of Education, IPEDS*

Less than Four-Year Institutions	City	Total Fall Enrollment (2005)	Total Graduates (2005)
Edison College*	Ft. Myers	10,653	1,313
Southwest Florida College	Ft. Myers	1,821	832
Lee County High Tech Center Central	Ft. Myers	509	232
Lee County High Tech Center North	Ft. Myers	184	72
<i>Sub-total:</i>		<i>13,167</i>	<i>2,449</i>
More than Four-Year Institutions	City	Total Fall Enrollment (2005)	Total Graduates (2005)
Florida Gulf Coast University	Ft. Myers	7,249	1,212
Hodges University (formerly International College)	Ft. Myers	1,673	575
<i>Sub-total:</i>		<i>8,922</i>	<i>1,787</i>
Grand Total		22,089	4,236

* Edison College now offers three bachelor's degree programs and has alliances with other colleges and universities to provide 25 additional bachelor's degree programs

2. **Edison College is the largest post-secondary institution in Lee County, and, in 2005, enrolled 10,653 students and conferred approximately 1,313 degrees.**
 - Edison College's main campus (Lee Campus) is located in Fort Myers. Other campuses include: Collier Campus in Naples; Charlotte Campus in Punta Gorda; and Hendry/Glades Services in LaBelle. Edison College programs encompass: Associate in Arts degree (AA); Associate of Science degree (AS) in 20 program areas; Certificate Programs in 12 program areas; Continuing Education (C.E.) in 15 program areas; and three college programs for high school students.
 - The Associate in Arts degree provides the foundation for continued study at Florida's ten state universities. The program consists of general education requirements and bachelor's degree program prerequisites.
 - Edison College baccalaureate programs are offered in three program areas: BAS in Public Safety and Management; BS in Secondary Biology Education; and BS in Secondary Mathematics. The Edison University Center is an alliance between Edison College and regionally accredited colleges and universities offering the opportunity for students to earn bachelor's degrees in 25 program areas.
 - Edison College program areas with the highest number of annual graduates include: liberal arts and sciences/liberal studies (647); registered nursing (105); criminal justice/law enforcement administration (25); business administration and management (20); and emergency medical technology/technician (17). (Refer to Exhibit D-10 in Appendix D.)
3. **Southwest Florida College's campus in Fort Myers enrolled 1,821 students and graduated approximately 832 students in 2005.** The institution offers associate's degrees, Bachelor of Science degrees, and general education courses in a variety of program areas.
 - Associate's degrees, diplomas, or certificates are offered in the following program areas: accounting technology; computer-aided drafting and design; computer programming and database management; criminal justice; early childhood education; graphic design; hospitality management; interior design and decorating; management and marketing; massage therapy; medical administration; medical assisting; medical billing and coding; network engineering and administration; paralegal studies; surgical technician; technical administration; and web design and development.
 - Bachelor of Science degrees include criminal justice, early childhood education, elementary education, interior design and decorating, and management. IPEDs data indicates that as of 2006, there were no graduates from these program areas.
 - General education courses and cooperative education (formal education along with work experience) are also provided.
 - Programs areas with the highest number of annual graduates include: graphic design, commercial art and illustration (43); computer and information sciences (40); business administration and management (38); medical records administration (38); medical assistant (31); accounting technician (22); and criminal justice studies (17).
4. **The Lee County High Tech Center Central (Ft. Myers) and the Lee County High Tech Center North (Cape Coral) provide career/technical programs for high school and adult students 16 years of age or older.** The facilities provide services for students in a five-county area, including Lee, Charlotte, Collier, Hendry, and Glades Counties. The facility, started in 1967, offers over 30 training programs in a variety of subject areas.

- Among programs offered at Lee County High Tech Center Central are academic services, automotive, business education, commercial foods, cosmetology, early childhood education, electronics, health sciences, industrial technology, public services, and vocational prep. Apprenticeship programs are provided in air conditioning, electrical, fire sprinkler, pipefitting, and plumbing.
 - Lee County High Tech Center North offers courses in over 25 program areas including: accounting operations; drafting; practical nursing; business supervision and management; commercial arts technology; culinary arts and commercial foods; computer systems technology; digital design; electronic technology; medical coding/billing; medical administrative specialist; network support services and CISCO; nursing assistant; patient care technician; PC support services; surgical technology; web design; and web programming, among others.
 - The top ten programs with the highest number of certificate earners include: practical nurse (45); surgical/operating room technician (21); cosmetic services (21); business administration and management (18); heating, air conditioning, and refrigeration mechanic and repairer (14); administrative and secretarial services (13); culinary arts and related services (10); accounting (9); electrician (8); and health and medical administrative services (8).
5. **Florida Gulf Coast University is the largest post-secondary institution in Lee County. The university had 7,249 enrollees in 2005, and it graduates approximately 1,212 students annually.** Florida Gulf Coast University is part of the Florida State University System, and is responsible for providing programs and services to a five-county region (e.g., Lee, Charlotte, Collier, Glades, and Hendry Counties). The institution opened in August 1997 and conferred its first degrees in May 1998, with 81 graduates.
- The university contains six distinct colleges, including: College of Arts and Sciences; College of Education; College of Health Professions; College of Professional Studies; Lutgert College of Business; and U.A. Whitaker School of Engineering. Presently offered are 47 undergraduate majors and 23 graduate degrees and programs. Non-degree and continuing education programs are also provided.
 - The Whitaker School of Engineering offers bioengineering, civil engineering, and environmental engineering degree programs. A new building is presently under construction with funding from the Whitaker Foundation, The Ginn Company, and a state matching grant. Classes began in fall 2005 (in temporary space), and the new facility is expected to open in fall 2008.
 - Florida Gulf Coast University provides distance learning and on-line courses with both degree- and non-degree-oriented curriculum.
 - The top ten programs with the highest number of bachelor's degrees earners include: liberal arts and sciences/liberal studies (149); elementary teacher education (80); registered nursing (69); criminal justice (62); business administration and management (44); management information systems and business data processing (36); accounting (29); public administration and services (27); finance (22); and medical technology (10).
 - The top ten master's degree programs with the highest number of graduates include: business administration and management (48); education administration and supervision (33); registered nursing (18); accounting (16); public administration (14); special education (12); curriculum and instruction (11); counselor education/counseling and guidance services (10); social work (10); and physical therapy (9).
6. **Hodges University, formerly named International College, offers associate's, bachelor's, and master's degree programs, as well as other non-degree courses of study.** Founded in 1990 as International College, the institution's name was changed to Hodges University in June 2007, reflecting the wider diversity of degree programs and the transition from college to university

distinction. Hodges University is an independent, not-for-profit institution with campuses located in Fort Myers and Naples, and additional learning sites at Cape Coral and in Charlotte, Manatee, Pasco, and Hernando Counties. On-line courses are also offered.

- In 2005, Hodges University enrolled 1,673 students and conferred approximately 575 degrees. The Fort Myers main campus is the largest, with 1,036 enrollees, followed by the Naples campus with 735 enrollees. Hodges University contains four distinct schools: School of Allied Health; Kenneth Oscar Johnson School of Business; School of Professional Studies; and School of Technology. Offered are 12 associate's degrees, 11 bachelor's degrees, and seven master's degrees.
- Degrees are offered in 17 program areas, including: accounting; applied psychology; business administration; computer information technology; criminal justice; design and drafting; health administration; health information technology; health studies; information system management; interdisciplinary studies; legal studies; paralegal studies; management; medical assisting; professional studies; and public administration.
- Bachelor's degree program areas with more than ten graduates in 2005 include: business administration, management, and operations (155); multi-disciplinary studies (54); criminal justice/safety studies (29); business administration and management (26); accounting (21); information technology (19); and computer/information tech services administration and management (16). Master's degree programs with more than ten graduates include: business administration, management and operations (40); business administration and management (25); criminal justice/law enforcement administration (12); and computer/information tech services administration and management (11).

7. **Boosting educational performance in Lee County public schools remains an ongoing challenge; however, the school district is committed to expanding facilities and programs to meet the educational needs of its students.** Lee County School District is the ninth-largest district in Florida and one of the 50 largest school districts in the U.S. For the 2006/2007 school year, Lee County had the highest increase in student enrollment of any district in Florida. The school district currently educates approximately 82,000 students in grades K-12 and the student population continues to grow. Estimates indicate the student population may reach 140,000 by 2017.

- Three new Comprehensive High Schools recently opened in Lee County. The Comprehensive High Schools provide secondary students the opportunity to not only select courses from the traditional academic and extracurricular programs, but offers the option of pursuing specialized programs within a Technical and Career Education Academy. In addition to being prepared for acceptance at a post-secondary institution, students who graduate from the Comprehensive High Schools have the opportunity to gain marketable skills and competencies now required in specialized businesses and industries. Students have the option of joining career academies at each facility. The three Comprehensive High Schools include:
 - *Ida S. Baker High School (Cape Coral)*: the facility opened in August 2004 and currently serves approximately 2,100 students. The five academies available include: Medical and Biotechnology; Public Service; Business and Technology; Engineering and Manufacturing; and Building and Construction. School choice is required in Florida, and Ida S. Baker High School is the most requested school in the district.
 - *South Fort Myers High (Fort Myers)*: the facility was built in 2005 and accommodates approximately 1,400 students. Academies include: Medical and Biotechnology (sports medicine/physical therapy, veterinary assisting, and biotechnology, and EMS first responder); Public Service (pre-law/criminal justice, pre-education/teacher assisting, fire fighting, and journalism); and Building Construction (drafting).

- *East Lee County High School (Lehigh Acres)*: the facility opened in August 2005 and currently serves approximately 900 students. Academies presently offered include: Building Construction (CADD, construction engineering, building construction technology/pre-apprentice, environmental); Engineering and Manufacturing Technology (pre-engineering, manufacturing/integrated systems/CAM, computer engineering/robotics, and automotive technology); Business, Finance, Information Technology and Marketing (medical lab/biotechnology, emergency medical services, and health science/physical therapy, sports medicine); Public Service (journalism/television production, pre-education, pre-law/criminal justice, and firefighting); and Tourism and Hospitality (the newest program).
 - Students in the district also have the opportunity for dual enrollment at Edison College and Florida Gulf Coast University, enabling high school students to earn both high school and college credits.
 - Notably, the Ford Foundation has selected and designated Lee County and the Lee County School District as a Career Academy Innovation Community, one of three selected nationwide. The Ford Foundation will provide funding, technical support, and mentoring assistance to the district to increase the number of students learning in successful career academies. The program also provides ongoing technical assistance and other benefits to help sustain successful career academy networks after they are established.
8. **Responding employers report that they rarely work with area secondary and post-secondary educational institutions for training programs, apprenticeships, co-ops, or other programs.** Employers infrequently use area high schools, as well as the post-secondary institutions in or near the region (e.g., Lee County Technical Centers, Barry University, Edison College, Hodges University, NOVA Southeast University, Florida Gulf Coast University, and Southwest Florida College). When they *are* used, however, Florida Gulf Coast University, Lee County Technical Centers, area high schools, and Edison College are most often reported as the providers used. Private training vendors are also rarely used. (Refer to Table 44).
- Of survey respondents, 23.8% report that their training needs are not met locally. Employers report a large number of training needs that are not met locally, including: engineering (general and advanced); advanced CADD training; mechanics (aircraft and diesel); specialized banking skills; CNC programming; computer skills (machine and microelectronic); electrical estimating; embroidery design; heavy equipment operators; English as a second language; hospital-based coding; human resource management; industrial electric; insurance sales; MBA programs; media buying/planning; medical lab technicians/supervisor; sign fabrication; OSHA training; pharmacy; public relations; retail management; legal secretary; press operations; trade skills (carpentry, drywall, plaster); and ultrasound.

TABLE 44: Employer Ratings of Utilization Frequency of Training Programs from Regional Training Providers*Source: WDG Employer Survey, Summer/Fall 2007 (1=Never; 5=Continuously)*

Institution	Responses	Average Score	Median Score
Florida Gulf Coast University	186	1.8	1.0
Lee County Technical Centers	183	1.6	1.0
Area high schools	184	1.5	1.0
Edison College	185	1.5	1.0
Private vendors (e.g., training & development consultants)	181	1.5	1.0
Hodges University (formerly International College)	182	1.2	1.0
Southwest Florida College	181	1.2	1.0
Barry University	181	1.1	1.0
NOVA SE University	181	1.1	1.0

9. **Those employers responding to WDG's survey with knowledge of the graduates from and programs at the area's educational institutions report unsatisfactory quality ratings of the graduates and programs.** The quality ratings are presented below in Table 45. Employers report that the region's high schools, community colleges, and four-year colleges and universities need to bolster programs to improve the basic skills of their students in work ethic, communication/speaking, job interview skills, job preparedness, critical thinking, life skills, reading/writing, and computer/software skills. The needed improvements are listed in Exhibit B-1, Appendix B.

TABLE 45: Employer Ratings of the Quality of Graduates and Programs from Regional Educational Institutions*Source: WDG Employer Survey, Summer/Fall 2007 (1=Poor; 5=Excellent)*

Institution	Responses	Average Score	Median Score
Area high schools	150	2.3	2.0
Florida Gulf Coast University	141	2.8	3.0
Edison College	136	2.5	3.0
Lee County Technical Centers	145	2.4	3.0
Area high schools	150	2.3	2.0
Hodges University (formerly International College)	120	2.0	1.0
Private vendors (e.g., training & development consultants)	118	2.0	1.0
Southwest Florida College	119	1.9	1.0
Barry University	113	1.7	1.0
NOVA SE University	109	1.6	1.0

10. **The full-time total graduation rates for the two four-year and graduate post-secondary educational institutions range from 31% to 35% (with rates consistently higher for female students), and the graduation rate for the three two-year institutions ranges from 29% to 82%.** The Lee County High Tech Center-Central has a student retention rate of 68%, while Edison College and Southwest Florida College retention rates for full-time enrollees are lower, at 56% and 46%, respectively. (Refer to Table 46.)

TABLE 46: Retention and Graduation Rates at Regional Post-Secondary Schools, 2006

Source: U.S. Department of Education, IPEDS

Less than Four-Year Institutions	Retention Rate*		Graduation Rate**		
	FT	PT	FT Total	Male	Female
Edison College*	56%	39%	29%	27%	31%
Southwest Florida College	46%	38%	82%	82%	81%
Lee County High Tech Center Central	68%	N/A	54%	58%	53%
Lee County High Tech Center North	63%	N/A	62%	43%	72%
Four-Year or More Institutions					
Florida Gulf Coast University	75%	57%	35%	30%	39%
Hodges University (formerly International College)	34%	50%	31%	25%	35%

* Retention rates measure the percentage of entering students who continue their studies the following fall.

** The graduation rate is the percentage of students in a given entering group who graduated within 150% of normal time to program completion.

*** Edison College now offers three bachelor's degree programs and has alliances with other colleges and universities to provide 25 additional bachelor's degrees.

11. High school graduation rates for the 2004-2005 school year (where data is available) range from a high of 78.2% (Fort Myers High School) to a low of 26.0% (Richard Millburn Academy). Graduation rates for those schools where data is currently available are presented in Table 47, below.

TABLE 47: High School Graduation Rates, 2004-2005 School Year

Source: Florida Department of Education

School	Graduation Rate 2004-2005 School Year						
	All Students	White	Black	Hispanic	Asian	American Indian	Multiracial
Cape Coral H.S.	61.4%	67.0%	32.4%	60.0%	62.5%	100%	66.7%
Cypress Lake H.S.	74.2%	86.0%	41.1%	62.5%	92.9%	100%	60.0%
Dunbar H.S.	47.6%	45.8%	52.1%	39.0%	100%	N/A	N/A
East Lee County H.S.*	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Estero H.S.	64.9%	74.4%	26.7%	48.2%	66.7%	50.0%	50.0%
Fort Myers H.S.	78.2%	91.4%	44.0%	58.8%	94.4%	100%	80.0%
Gateway Charter H.S.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Ida S. Baker H.S.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Lehigh Senior H.S.	60.2%	68.6%	52.0%	50.0%	58.3%	83.3%	66.7%
Mariner H.S.	71.1%	76.3%	42.9%	62.2%	100.0%	N/A	75.0%
N. Fort Myers H.S.	66.4%	67.9%	58.8%	65.2%	80.0%	50.0%	88.9%
Richard Millburn Academy	26.0%	25.5%	29.4%	21.4%	N/A	N/A	N/A
Riverdale H.S.	57.2%	68.0%	31.0%	37.6%	100%	N/A	83.3%
S. Fort Myers H.S.*	N/A	N/A	N/A	N/A	N/A	N/A	N/A

*New high schools.

12. Florida ranks lower than the national average regarding student performance, although several Lee County area high schools perform well on key academic achievement measures. According to the February 2007 U.S. Chamber of Commerce report *Leaders and Laggards: State Report Cards*, eighth-graders stand four percentage points below the national average in the

percentage of students at or above the *proficient* level on the NAEP reading exam. They also fail in the categories of “rigor of standards” and “post-secondary and workforce readiness.”

13. For the 2006-2007 school year, none of the high schools in Lee County met the Average Yearly Progress requirements under the No-Child-Left-Behind Act. The performance of Florida schools is assessed in two ways: one is to meet the state’s A+ Plan requirements, and the other is to comply with the federal No-Child-Left-Behind Act rules. Florida’s A+ Plan assigns a school grade ranging from A (highest grade) through D, F, and P (lowest grades). Florida’s No-Child-Left-Behind compliance measures indicate whether the school has met the Average Yearly Progress requirements and, based on school grade, whether assistance and intervention provisions are required. Of the 14 Lee County high schools, 12 require the preparation of school improvement plans, and two (Richard Millburn Academy and Lehigh Senior High School) require additional assistance and intervention measures. The three Lee County high schools earning an A grade are Fort Myers High School, Cypress Lake High School, and Lee Gateway Charter High School. (Refer to Table 48).

TABLE 48: Public High School Performance Measures, 2006-2007 School Year
Source: Florida Department of Education

School	AYP Met?	% Meeting High Standards (FCAT Level 3 and above)				% of Students Making Learning Gains		Adequate Progress of Lowest 25% in the School?		% of 11 th and 12 th Graders Meeting the Graduation Requirement on the FCAT Retake		School Grade
		Reading	Math	Writing	Science	Reading	Math	Reading	Math	Reading	Math	
N. Fort Myers H.S.	No	46%	73%	87%	33%	54%	74%	44% (NO)	64% (YES)	48%	66%	C
Richard Millburn Academy	No	10%	19%	86%	36%	17%	41%	16% (NO)	45% (NO)	17%	60%	P
Fort Myers H.S.	No	71%	88%	95%	65%	65%	75%	55% (YES)	58% (YES)	52%	54%	A
Cypress Lake H.S.	No	55%	84%	87%	49%	59%	80%	55% (YES)	69% (YES)	57%	43%	A
Estero H.S.	No	43%	72%	81%	31%	51%	74%	54% (YES)	69% (YES)	55%	72%	C
Mariner H.S.	No	44%	71%	87%	31%	50%	72%	47% (NO)	70% (YES)	57%	59%	C
Cape Coral H.S.	No	45%	71%	87%	35%	49%	72%	36% (NO)	65% (YES)	51%	64%	C
S. Fort Myers H.S.	No	41%	68%	84%	32%	51%	70%	48% (NO)	64% (YES)	63%	53%	C
Riverdale H.S.	No	44%	64%	84%	34%	48%	67%	43% (NO)	60% (YES)	48%	76%	C
Ida S. Baker H.S.	No	45%	76%	87%	28%	53%	76%	50% (YES)	71% (YES)	60%	54%	B
Lee Gateway Charter H.S.	No	44%	73%	88%	47%	54%	75%	66% (YES)	69% (YES)	61%	82%	A
East Lee County H.S.	No	29%	51%	82%	36%	48%	68%	58% (YES)	69% (YES)	N/A	N/A	C
Dunbar H.S.	No	42%	60%	83%	18%	63%	74%	57% (YES)	70% (YES)	56%	57%	C
Lehigh Senior H.S.	No	29%	57%	87%	25%	42%	66%	39% (NO)	64% (YES)	44%	61%	D

Labor Cost

1. **On average, the salary/wages for which not-employed residents are willing to work are roughly 24% lower than the Lee County average.** Not employed residents interested in employment would be willing to enter the workforce for an average wage/salary of \$25,186 (\$12.11/hr), below the Lee County average annual earnings of \$33,069. (\$15.90/hr).
2. **Residents who consider themselves underemployed would be willing to accept a new position for an average annual wage/salary of \$49,777 (\$23.93/hr), well above the Lee County average.** Notably, the underemployed residents have higher educational attainment levels for one- to three-years of college, associate's degrees, bachelor's degrees, and graduate degrees than the county averages for these post-secondary educational categories.
3. **Average industry earnings in Lee County are slightly lower than the Florida average and considerably lower than the U.S. averages.** The county's overall 2005 average earnings per year per worker (\$33,069), latest data available, were 1.7% lower than the Florida average (\$33,655), and 14.2% lower than the national average (\$38,539). (See Exhibit D-7, Appendix D).
 - Lee County's average earnings are higher than the national average earnings in the following industry sectors: forestry, fishing, hunting, and agricultural support; retail trade; management of companies and enterprises; educational services; healthcare and social assistance; accommodation and food services; and unclassified establishments.
 - Industry sectors in which the county has lower average earnings than the national average include: mining; utilities; construction; manufacturing; wholesale trade; transportation and warehousing; information; finance and insurance; real estate, renting and leasing; professional, scientific and technical services; administrative support, waste management, remediation services; arts, entertainment and recreation; and other services (except public administration).

4. **Relative to other WDG-studied areas, earnings for entry-level and experienced workers fall below national averages.**

- Table 49 identifies median annual earnings for selected benchmark occupations according to SalarySource.com. Wages in Fort Myers fall roughly 10% or more below the U.S. median earnings.

TABLE 49: Median Annual Earnings by Selected Benchmark Occupations

Source: SalarySource.com

Occupation	Ft. Myers	U.S.
Accounting Clerk	\$28,261	\$31,692
Assistant, Administrative	\$35,422	\$39,898
CAD Drafter	\$38,315	\$43,094
Civil Engineer	\$61,439	\$67,091
Computer Programmer	\$50,065	\$55,160
Customer Service Representative	\$29,385	\$32,962
Electronics Technician	\$35,432	\$40,062
Engineering Technician	\$40,450	\$45,151
Lab Technologist	\$32,861	\$37,263
Maintenance Specialist	\$33,530	\$37,868
Machinist - Journey	\$35,303	\$39,720
Nurse, Licensed Practical	\$31,015	\$35,136
Nursing, Certified Assistant	\$23,553	\$25,701
PC Support Specialist	\$51,041	\$56,510
Secretary, Executive	\$40,541	\$45,215
Analyst, Systems	\$67,310	\$73,470
Tool & Die Maker	\$43,965	\$48,578
Assembler	\$23,948	\$26,212

- Table 50 provides average and median earnings according to surveyed area employers as of October 2007.

TABLE 50: Annual Salaries of Surveyed Employers*Source: WDG Employer Survey, Summer/Fall 2007*

Occupation	Responses	Average Starting Rate	Median Starting Rate
General Business and Office Support			
Accounting clerks/bookkeepers	80	\$30,735	\$30,080
Administrative assistants	77	\$28,468	\$28,000
Call center agent/representative	30	\$23,089	\$22,512
Claims processing clerks	15	\$25,167	\$24,960
Clerical workers with advanced computer skills	60	\$27,634	\$26,706
Customer service representatives	47	\$26,008	\$24,960
Office clerks	47	\$22,723	\$22,880
Management and Supervisory			
Construction supervisors	39	\$50,347	\$49,920
General & operations managers	37	\$59,816	\$52,000
Management trainees	17	\$36,725	\$33,280
Management, experienced	39	\$58,065	\$59,500
Production supervisors	23	\$42,135	\$37,440
Purchasing agent	16	\$39,269	\$38,314
Technical and Professional			
Accountants/auditors	28	\$46,675	\$43,500
CAD drafters	21	\$39,260	\$37,440
Engineering technicians	16	\$37,356	\$37,628
Engineers	21	\$55,560	\$55,000
Financial analysts/advisors	9	\$50,032	\$50,000
Lab technicians	7	\$34,983	\$30,000
Medical assistants	8	\$28,619	\$27,040
Medical/clinical lab technologists	3	\$27,507	\$30,000
Medical records technicians	7	\$27,817	\$22,880
Medical secretaries	6	\$24,936	\$25,480
Nurses, licensed practical	10	\$39,598	\$39,260
Nurses, registered	11	\$55,701	\$52,000
Pharmacy technicians	4	\$32,818	\$26,303
Physical therapists	6	\$67,293	\$59,120
Physicians	2	\$132,500	\$132,500
Radiological technologists	5	\$45,696	\$45,000
Respiratory therapists	2	\$48,500	\$48,500
Sales representatives	22	\$47,403	\$41,600
Scientists (general)	6	\$51,327	\$51,480
Teachers, elementary	6	\$34,315	\$34,767
Teachers, secondary	5	\$33,507	\$34,534
Technicians (general)	14	\$30,935	\$31,200

TABLE 50 (continued): Annual Salaries of Surveyed Employers

Source: WDG Employer Survey, Summer/Fall 2007

Occupation	Responses	Average Starting Rate	Median Starting Rate
Production, Maintenance and Distribution			
Bench assemblers	11	\$14,940	\$16,640
Building and construction trades	21	\$29,831	\$28,080
CNC machine operators	3	\$34,480	\$32,240
Electrical and electronic repairer	19	\$33,713	\$33,280
Inspectors, testers & sorters	6	\$26,000	\$24,960
Machine operators, no setup	9	\$24,172	\$20,800
Machinists/manufacturing mechanics	4	\$30,020	\$29,640
Maintenance mechanics	13	\$32,062	\$31,200
Shipping & receiving	16	\$21,795	\$20,800
Skilled machine trades (general)	9	\$27,228	\$27,040
Welders	11	\$33,187	\$32,822
Computer and Information Systems			
Computer operators	6	\$31,967	\$31,185
Computer security specialists	4	\$38,256	\$38,412
Computer software engineers	11	\$52,696	\$54,000
Computer support specialists, technicians	21	\$36,140	\$35,000
Database administrators	10	\$52,771	\$47,725
Internet development specialists	4	\$46,551	\$50,211
Network systems administrators	9	\$45,834	\$46,500
Network technicians	12	\$37,170	\$39,178
Programmers/analysts	12	\$47,833	\$46,586
Systems analysts	9	\$44,625	\$49,924
Webmasters	7	\$52,944	\$41,600
Other			
Heavy equipment operator	1	\$39,520	\$39,520

Business Climate and Operating Environment

1. **The labor-related operating environment in Florida is favorable for business.** A review of existing labor legislation reveals many advantages for employers. (Refer to Table 51.)
 - There are no current statewide restrictions that are stronger than federal ones in terms of plant closings, ADA legislation, EEO standards, sexual harassment law, or mandated parental leave.
 - Florida is a right-to-work state, and has laws concerning employment-at-will, meaning that an employee is hired at will and that employment can be terminated at the will of either the employer or employee.
 - Employers report no restrictions on pre-employment drug testing or drug testing for cause.

TABLE 51: Labor Legislation in Florida
Source: WDG Database

Labor Legislation	
Employment at will?	Yes
If yes, significant restrictions (from employers standpoint)	No
Restrictions on employee drug testing	No
Telephone monitoring restrictions for regulation of productivity (or customer service)	Yes: Two-Party Consent
Plant Closing Law stricter than Federal?	No
ADA legislation stricter than Federal?	No
Ban on hiring replacement workers during a strike?	No
Striking workers entitled to unemployment insurance?	No
Relatively difficult for an employer to contest and win a workers' comp. claim?	No
Relatively difficult for an employer to contest and win an unemployment ins. claim?	No
Right to Work law in effect?	Yes
EEO hiring standards more restrictive than Federal?	No
Sexual harassment laws more restrictive than Federal?	No
Mandated parental leave legislation more generous than Federal?	No
Onerous provisions for wrongful discharge	No
Restrictions on applicant testing	No

2. **According to data published in 2007, Florida workers' compensation insurance rates are higher than the U.S. average.** In 2007, average workers' compensation costs were 14.1% higher than the national average, according to the annual analysis of workers' compensation costs by Actuarial & Technical Solutions of Ronkonkoma, New York. According to Actuarial & Technical Solutions, Florida ranked 35 among 45 states evaluated (with 45 being the most expensive). In Table 52, the index indicates the percentage above or below the U.S. average for workers' compensation rates. The rates, though, are improving. In 2008, they will drop by 18.4%. This decrease follows a trend. The cumulative overall statewide average rate will show a decline of 50% between 2003 and 2008.

TABLE 52: Workers' Compensation Comparative Costs, 2007* (Index U.S. Average=1)**

Source: Actuarial & Technical Solutions

State	Index	Rank	State	Index	Rank	State	Index	Rank
Arizona	0.489	1	New Mexico	0.852	16	Illinois	1.097	31
Indiana	0.501	2	Colorado	0.869	17	Oklahoma	1.102	32
Utah	0.547	3	South Carolina	0.886	18	Tennessee	1.114	33
Oregon	0.555	4	Nevada	0.893	19	Missouri	1.141	34
Arkansas	0.577	5	Georgia	0.898	20	Florida	1.141	35
Virginia	0.601	6	Mississippi	0.898	20	New Jersey	1.153	36
Massachusetts	0.672	7	Nebraska	0.959	22	Connecticut	1.197	37
South Dakota	0.742	8	Rhode Island	0.961	23	Hawaii	1.224	38
Maryland	0.749	9	Pennsylvania	1.010	24	Texas	1.299	39
North Carolina	0.754	10	Minnesota	1.015	25	Montana	1.314	40
Idaho	0.783	11	Alabama	1.046	26	New York	1.387	41
Wisconsin	0.810	12	Louisiana	1.049	27	Delaware	1.635	42
Iowa	0.825	13	Kentucky	1.073	27	Alaska	1.754	43
Michigan	0.825	14	Maine	1.080	29	California	1.759	44
Kansas	0.842	15	New Hampshire	1.088	30	Vermont	1.818	45

* Ranked from lowest to highest ** Five states are self-insured and not reported in this index

- The Florida state sales/use tax rate is 6%, and Lee County does not currently impose a discretionary sales surtax. The sales tax rate is based on the total price of the retail sale and the rental of tangible personal property, certain services and admissions, the rental or lease of certain real property and transient living accommodations. The sales/use tax rate is 7% on commercial telecommunications services and electrical energy. (Refer to Table 53).

TABLE 53: Subject to State Sales/Use Tax in Florida

Source: WDG proprietary data

Factor	Florida
Production Machinery and Equipment	New Companies – No/Expanding companies – Yes
Non-production Machinery and Equipment	Yes
Pollution Control Equipment	No
Office FF&E	Yes
Telecommunications Equipment	Yes
Computer Hardware	Yes
Computer Software - Customized	No
Computer Software - Standard	Yes
Raw Materials	No
Electric Power	Yes
Natural Gas	No
Water	No
Sewer	No

Factor	Florida
Hazardous Waste Disposal	No
Non-hazardous Waste Disposal	No
Telephone - Local	Yes
Telephone - Intra-State	Yes
Telephone - Inter-State	Yes
Telephone - 1-800 - Intra-State	Yes
Telephone - 1-800 - Inter-State	Yes
Telephone - WATS - Intra-State	Yes
Telephone - WATS - Inter-State	Yes
Professional Services	No
Building Construction Materials, Office	Yes
Building Construction Materials, Industrial	Yes

4. **Florida taxes most categories of personal property.** Florida’s ad valorem taxes consist of two components: real property and tangible personal property. Tangible personal property is assessed on January 1 each year as a snapshot of a business’ tangible personal property. Nearly all categories of personal property, with the exception of inventory, are subject to taxation at state and local levels. Florida has a Freeport Exemption in foreign trade from or to another state, if held in the state for up to 180 days. (Refer to Table 54.)

TABLE 54: Subject to State Personal Property Tax in Florida
Source: WDG proprietary data

Factor	Florida
Production Machinery and Equipment	Yes
Non-production Machinery and Equipment	Yes
Pollution Control Equipment	Yes (Valued at not greater than salvage value)
Computer Hardware	Yes
Computer Software - Customized	Yes
Computer Software - Standard	Yes
Telecommunications Equipment	Yes
Office FF&E	Yes
Office Supplies	Yes
Inventory - Raw Materials	No
Inventory – Work in Progress	No
Inventory – Finished Goods	No
Freeport Exemption–Type	Exempt if in foreign trade from or to another state up to 180 days

5. **Between 1990 and 2006, there have been 15 union certification elections and two union decertification elections in Lee County, according to the National Labor Relations Board.** (Refer to Exhibit D-17 in Appendix D.)
- Of the 15 certification elections, unions won seven, representing a 47% union success rate. The Teamsters were involved in three of the certification elections and had success in two elections.
 - Of the two decertification elections, unions lost both. The Teamsters were not involved in either of these elections.
 - Notably, there have been no union elections recorded by the National Labor Relations Board in Lee County since June 2002. Of the nine union elections held since 2000, six were lost by the unions. The last union election recorded involved 77 eligible voters at the News Press Publishing Co., and 59 voted against union representation.
8. **Interviewed employers indicated that workers are not predisposed to union representation, and new companies would be able to maintain a non-union environment.** To diminish union risk, companies are encouraged to provide competitive wages and benefits and an employee-friendly work environment, including an open-door communications policy. Nevertheless, the Teamsters and United Food and Commercial Workers unions have a presence in the area, and companies must remain aware of the local and regional labor climate.

Quality of Life

1. **The quality of life in the Lee County study area is commensurate with its population size and density.** Cultural offerings in the area are moderate, and outdoor recreational opportunities are plentiful.
 - Harborside Event Center and Mann Performing Arts Hall at Edison College, both located in Fort Myers, annually host several touring artists. The area boasts several museums and historical sites, including the Edison & Ford Winter Estates, Bailey-Matthews Shell Museum, and the Thomas Edison Laboratory and Museum. Fort Myers is also home to the Southwest Florida Symphony Orchestra and Chorus since their debuts in 1961. The symphony also provides community concerts to residents in the area.
 - The Lee County area has 68 golf courses, including daily fee, municipal, and private courses. Land in recreational use exceeds 19,000 acres, which includes four federal parklands and four state parks. In addition to the available land recreation areas, there are also more than 150,000 acres of lakes and rivers, as well as more than 3,800 acres of offshore gulf waters for recreation.
2. **Employers report a satisfactory quality of life.** Quality-of-life factors receiving a slightly-higher-than-satisfactory rating include private education (K-12) and healthcare services. Public education (K-12) received a satisfactory rating. (Refer to Table 55).
 - Factors receiving a slightly-lower-than-satisfactory rating include availability of affordable homes, availability of affordable rentals, and availability of childcare.

TABLE 55: Quality-of-Life Ratings
Source: WDG Employer Survey, Summer/Fall 2007 (1=Poor; 5=Excellent)

Factor	Average	Median
Public education (K-12)	3.0	3.0
Private education (K-12)	3.5	3.0
Availability of affordable homes	2.1	2.0
Availability of affordable rentals	2.3	2.0
Availability of childcare services	2.5	3.0
Healthcare services	3.2	3.0

3. **Housing at multiple price points is available in the area; however, housing prices are higher than both the state and national averages.** The Claritas-estimated 2007 Lee County median home value (\$238,863) is roughly 23% higher than the state average (\$194,467). The county's median home price is 38% higher than that of the national median (\$172,914). Current Multiple Listing Service real estate offerings indicate moderate housing availability throughout the housing price-points. (Refer to Table 56.)

TABLE 56: Available Homes By Price Level, October 2007

Source: Realtor.com

Home Value	Lee County Area	
	#	%
Under \$100,000	416	2.1%
\$100,000-\$149,999	1,853	9.2%
\$150,000-\$199,999	4,147	20.6%
\$200,000-\$249,999	3,146	15.7%
\$250,000-\$299,999	2,683	13.4%
\$300,000-\$349,999	1,599	8.0%
\$350,000-\$400,000	1,531	7.6%
\$400,000-\$450,000	795	4.0%
\$450,000-\$500,000	885	4.4%
\$500,000 and over	3,038	15.1%
Total:	20,093	100.1%*

4. **The cost-of-living index for Lee County is slightly higher than the Florida average, and is also higher than the national average.** Using the Economic Research Institute Relocation Assessor (ERI), WDG developed a cost-of-living comparison based on a household earning \$50,000 annually, a family size of three, and owning a 1,613 square foot home. The composite ERI cost-of-living for residents of Lee County is 113.4, with the state of Florida coming in at 107.3. Both are higher than the national norm (100).
5. **The property- and violent-crime rates in Lee County are lower than Florida's, yet slightly higher than the U.S. averages.** According to the 2003 FBI crime reports, the property-crime rate for Lee County (3,587 crimes per 100,000 residents) was lower than the Florida average, but slightly higher than the U.S. average (4,452 and 3,517 crimes per 100,000 residents, respectively). The Lee County violent-crime rate (536 crimes per 100,000 residents) was lower than the Florida average, yet higher than the U.S. average (730 and 466 crimes per 100,000 residents, respectively).
6. **The Lee County area hosts six hospitals containing a total of approximately 1,700 beds, and the quantity of hospital beds per capita exceeds state and national rates.** Physician services (192 physicians per 100,000 residents) are slightly lower compared to Florida and the nation (212 and 209 physicians per 100,000 residents, respectively). (Refer to Exhibit D-13 in Appendix D.) According to the *Places Rated Almanac* published in 2007, the Cape Coral-Fort Myers MSA is underserved in the areas of general medicine and pediatrics. Notably, the MSA is well served in the area of osteopathy, as well as surgical and medical specialists.