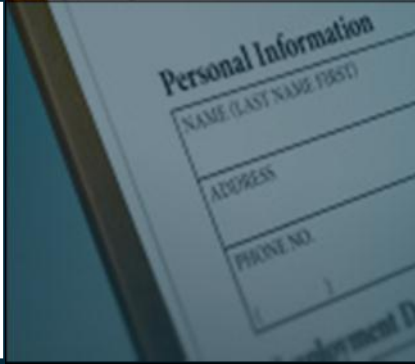


Cedar Valley Regional Partnership

Black Hawk, Bremer, Buchanan, Butler, Chickasaw, Grundy & Tama Counties

Workforce Needs Assessment



Released

2013

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Cedar Valley Regional Partnership

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Cedar Valley Regional Partnership

Iowa Workforce Development conducted the fourth annual Workforce Needs Assessment from August 2012 through December 2012. In addition to vacancy and retirement data, this year's survey included questions pertaining to average hourly starting wage and enhanced emphasis on fringe benefits. Analysis of the survey illustrates the demand for workers and skills required in the workforce. This information can be used by economic developers, government leaders, educators and state agencies to guide their decision making on issues related to workforce development, vocational training and employee recruitment programs.

Beginning in August 2012, 2,838 employers in the Cedar Valley Regional Partnership area were contacted and asked to complete the survey. Three attempts were made to contact each employer. By the end of the survey period (December 15, 2012), the survey had received 500 responses, yielding a 17.6 percent response rate.

Throughout this report, estimates and data are given by industry and by occupational category. Industry groups are developed around a specific product and employ many different occupations. Occupational categories are focused on the actual tasks done by a worker. The two formats are given to satisfy different end users of the data. Industry groups are of particular importance to economic developers and policy-makers. Occupational categories may be of more use to job seekers and educators.

Figure 1 details the survey respondents by industry, including the percentage of total current vacancies that are accounted for by each industry in the state. Vacancies are classified as current if they are, or will become, available within 12 months of the survey date.

These estimates are only valid if it is assumed that the vacancy rate for survey respondents and non-respondents is the same on average. The vacancy rate may be lower among non-respondents, as businesses that do not have current vacancies may be less likely to respond to the Workforce Needs Assessment Survey.

Figure 1
Survey Respondents by Industry and Percentage of Current Vacancies

Industry	Percent of Respondents	Percent of Total Vacancies Reported	Estimated Vacancies
Healthcare & Social Services	10.8%	17.5%	477
Accommodation & Food Services	4.4%	16.8%	460
Manufacturing	12.8%	16.6%	454
Administrative & Waste Services	3.8%	9.6%	261
Construction	15.2%	7.7%	210
Public Administration	5.8%	5.6%	153
Wholesale & Retail Trade	17.2%	5.2%	142
Transportation & Warehousing	4.2%	4.6%	125
Personal Services	6.2%	3.5%	96
Professional & Technical Services	6.0%	3.5%	96
Finance, Insurance & Real Estate	3.6%	3.3%	91
Arts, Entertainment & Recreation	1.6%	2.5%	68
Educational Services	1.6%	2.2%	57
Information	1.8%	0.8%	23
Agriculture & Mining	2.8%	0.4%	11
Utilities	2.2%	0.2%	6
Management	*	*	*
Total	100%	100%	2,730

** Insufficient data reported*

Totals may vary due to rounding methods

Figure 2 (next page) shows estimated vacancies by occupational category. By breaking the data into separate occupational groups, we can see the majority of vacancies are within the food preparation & serving related, production and office & administrative support occupational categories, likewise, the highest number of vacancies by industry are in the healthcare & social services, accommodation & food services and manufacturing industries. The occupational categories are clustered using the Standard Occupational Classification (SOC) system. Each broad category includes detailed occupations requiring similar job duties, skills, education or experience.

Figure 2
Percentage of Current Vacancies by Occupational Category

Occupational Category	Percent of Total Vacancies Reported	Estimated Vacancies
Food Preparation & Serving Related	16.2%	443
Production	16.0%	437
Office & Administrative Support	11.4%	312
Personal Care & Service	9.6%	261
Construction & Extraction	8.7%	238
Transportation & Material Moving	6.4%	176
Healthcare Support	6.0%	165
Installation, Maintenance & Repair	4.2%	114
Healthcare Practitioner & Technical	3.3%	91
Building & Grounds Cleaning & Maintenance	2.7%	74
Computer & Mathematical Science	2.7%	74
Education, Training & Library	2.7%	74
Management	2.3%	62
Architecture & Engineering	1.7%	45
Sales & Related	1.7%	45
Community & Social Science	1.5%	40
Protective Service	1.1%	28
Business & Financial Operations	0.6%	18
Arts, Design, Entertainment, Sports & Related	0.4%	11
Farming, Fishing & Forestry	0.4%	11
Legal	0.4%	11
Life, Physical & Social Science	*	*
Total	100%	2,730

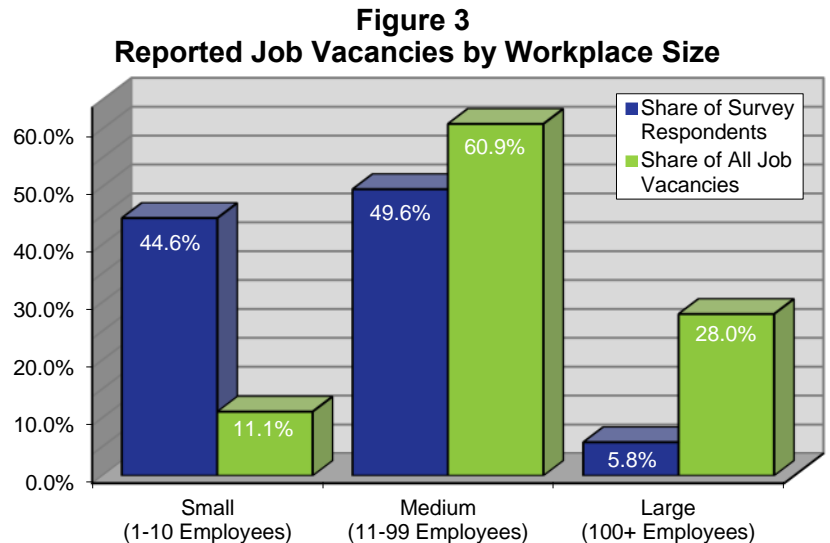
* Insufficient data reported
Totals may vary due to rounding methods

Of the survey respondents, 136 (27.2%) reported having one or more current or anticipated job vacancies, while 364 respondents (72.8%) reported having no job vacancies. A total of 481 current job vacancies were reported for the region, consisting of 60.5 percent full-time, 35.8 percent part-time and 3.7 percent seasonal or temporary positions. When asked why positions are currently vacant, employers responded as follows:

- 45.2% - Replacing worker who has left (not retired)
- 42.0% - Permanent business growth/expansion
- 7.6% - Seasonal business growth/expansion
- 5.3% - Replacing retiring employee

Figure 3 shows the breakdown of job vacancies by employer size. Of employers that responded with job vacancies, 44.6 percent were businesses with 10 or fewer employees, 49.6 percent had between 11 and 99 employees and 5.8 percent had 100 employees or more.

Figure 3 shows the distribution of reported job vacancies by employer size. The response rate for each employer size category is shown next to the respective percentage share of reported job vacancies. While large employers only accounted for 5.8 percent of the survey responses, they reported over one-fourth (28.0%) of the total job vacancies in the Cedar Valley Regional Partnership area.



One measure of workforce demand is determined by the job vacancy rate. With an estimated 2,730 job vacancies and a regional employment total of 106,438¹, there is a 2.6 percent vacancy rate or approximately three jobs available for every 100 filled positions. A low vacancy rate indicates a lack of jobs while a high vacancy rate may indicate a shortage of qualified workers or simply an industry with a high employee turnover. Conversely, a low vacancy rate may indicate contraction within the industry, an oversupply of workers, or lower than average turnover. It should be noted that many states do not use the same methods when calculating job vacancy rates and many states do not perform such calculations annually.

**Figure 4
Vacancy Rate by Industry**

Industry	Regional Employment ¹	Vacancy Rate
Arts, Entertainment & Recreation	819	8.3%
Administrative & Waste Services	3,825	6.8%
Accommodation & Food Services	8,650	5.3%
Construction	4,546	4.6%
Professional & Technical Services	2,532	3.8%
Transportation & Warehousing	3,792	3.3%
Healthcare & Social Services	14,989	3.2%
Public Administration	4,863	3.1%
Personal Services	3,176	3.0%
Information	1,044	2.2%
Manufacturing	21,211	2.1%
Finance, Insurance & Real Estate	5,672	1.6%
Utilities	450	1.3%
Agriculture & Mining	1,253	0.9%
Wholesale & Retail Trade	17,048	0.8%
Educational Services	11,867	0.5%
Management	701	*

** Insufficient data reported*

It is important to note the difference between the number of vacant positions and the vacancy rate. An industry may have a low vacancy rate but have many vacant positions. This is because, when compared to their total workforce, the number of vacant positions is small in comparison.

Figure 4 shows the vacancy rate and how many jobs are available per 100 filled positions by industry. The industries within the state with the highest vacancy rates are arts, entertainment & recreation (8.3%), administration & waste services (6.8%) and accommodation & food services (5.3%). These industries currently have relatively more vacant positions when compared to the size of their workforce. When looking at vacancy rates, it is important to understand the various reasons an industry might have many vacant positions open relative to their total staff.

**Figure 5
Vacancy Rate by Occupational Category**

Figure 5 breaks down the vacancy rate by occupational category. The categories with the highest vacancy rates are personal care & service (9.0%); computer & mathematical science (5.8%); and construction & extraction (5.4%). The services and construction categories typically have high vacancy rates due to high employee turnover. Employers are constantly hiring for many of these positions, while the high vacancy rate for the healthcare category is usually attributed to growth in employment and lack of workforce. Total employment by occupational category may differ from total employment by industry because of confidentiality issues in employer surveys.

Occupational Category	Regional Employment ²	Vacancy Rate
Personal Care & Service	2,900	9.0%
Computer & Mathematical Science	1,280	5.8%
Construction & Extraction	4,380	5.4%
Healthcare Support	3,290	5.0%
Food Preparation & Serving Related	9,400	4.7%
Production	13,450	3.2%
Legal	360	3.1%
Architecture & Engineering	1,820	2.5%
Farming, Fishing & Forestry	440	2.5%
Installation, Maintenance & Repair	4,850	2.4%
Community & Social Science	1,830	2.2%
Office & Administrative Support	14,270	2.2%
Building & Grounds Cleaning & Maintenance	3,490	2.1%
Transportation & Material Moving	8,340	2.1%
Protective Service	1,580	1.8%
Healthcare Practitioner & Technical	5,890	1.5%
Management	4,290	1.4%
Arts, Design, Entertainment, Sports & Related	1,070	1.0%
Education, Training & Library	7,880	0.9%
Business & Financial Operations	3,610	0.5%
Sales & Related	10,770	0.4%
Life, Physical & Social Science	440	*

** Insufficient data reported*

¹ Annual 2012 total regional employment from Iowa Workforce Development

² Regional employment by occupational category computed from 2011-2012 Iowa Local Employment Dynamics

Figure 6 presents the Hiring Demand Index (HDI)³ by occupational category. The HDI is another way of looking at the workforce needs within the economy. The vacancy rate shows us the overall demand for workers, but can be misleading because of employee turnover. To account for this, we adjust the vacancy rate by employee turnover to see which industries or jobs are in high demand, using the following equation:

$$(Industry\ Vacancy\ Rate \div Avg.\ Vacancy\ Rate) \div (Industry\ Turnover\ Rate \div Avg.\ Turnover\ Rate)$$

Example: The food preparation & serving related occupational category has an above average vacancy rate of 4.7 percent, while the vacancy rate for all categories is 2.6 percent. This implies that the workers within the category have a greater hiring demand than workers in other occupational categories. However, the turnover rate for employees in this category (defined as how often the industry hires for the same job within a year) is also much higher than others. The category has a turnover rate of 39.0 percent, while the turnover rate for all occupations is 27.1 percent. The HDI for the food preparation & serving related occupational category, is calculated as follows:

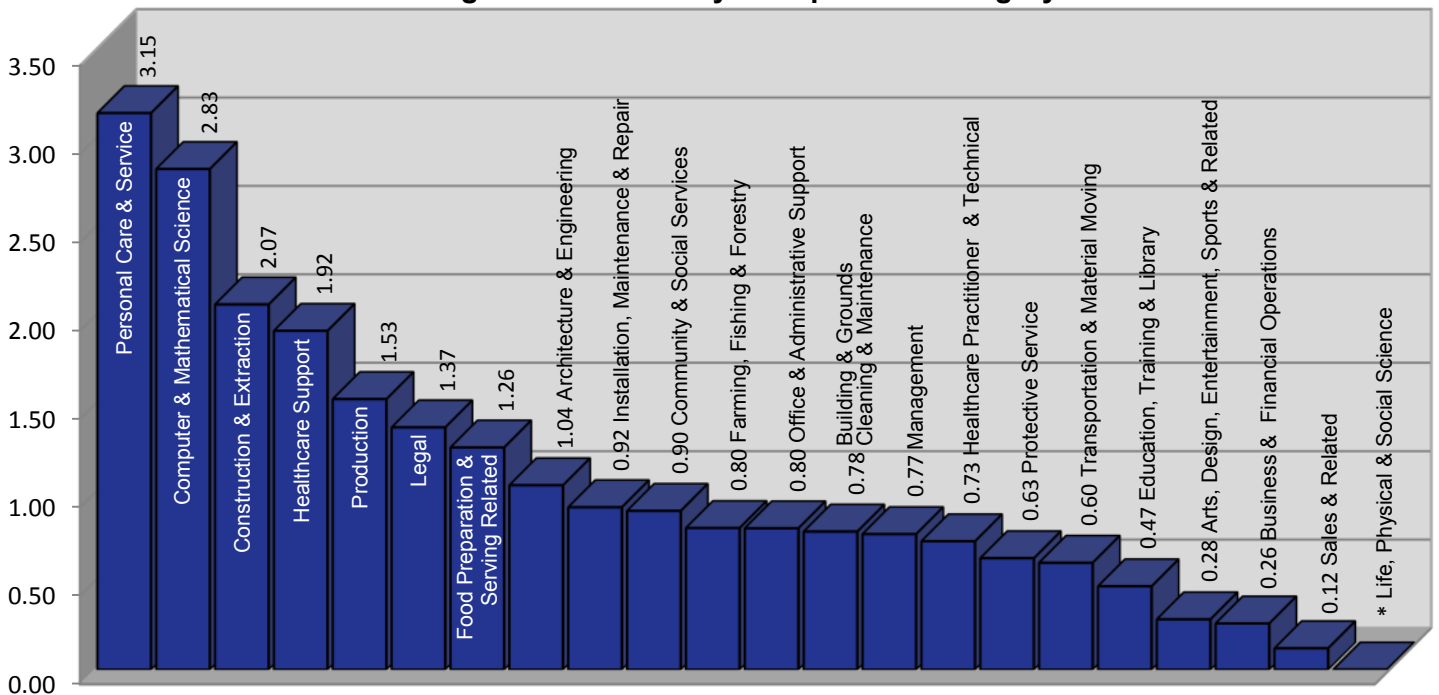
$$(4.7\% \div 2.6\%) \div (39.0\% \div 27.1\%) = 1.26$$

Using the HDI, we can see that the hiring demand for the food preparation & serving related occupations is not as high as it may have previously appeared. Note, the vacancy rate is calculated as the total estimated vacancies over the total estimated employment within the state. Using the average of the vacancy rates in each occupational category would be inaccurate due to very high and very low rates and the lack of data in some categories.

A value of one is the average demand for all industries or occupations. A value greater than one means a higher demand for workers, while a value lower than one means a lower than average demand for workers.

By comparing the Hiring Demand Index with the vacancy rates of an occupational category, we can see in which occupations is there a real unmet need for workers. It is also in these occupations that employers will need to pay a higher wage to attract qualified workers. This analysis can be an important tool for economic developers, policy-makers, educators and job seekers.

Figure 6
Hiring Demand Index by Occupational Category



*Insufficient data reported

³The Hiring Demand Index (HDI) adjusts industry vacancy rates, from this survey, by industry employee turnover rates which are computed from 2011 Iowa Local Employment Dynamics.

Requirements, Skills & Training

Employers were asked about the education/training and experience requirements of applicants for their reported job vacancies. The results for current job vacancies are shown below in **Figure 7** and **Figure 8**.

Figure 7
Education Required - Current Vacancies

Education Required	Percent
No Educational Requirement	17.4%
High School Education/GED	50.2%
Vocational/Technical Training	21.8%
Associate Degree	3.5%
Undergraduate Degree	4.4%
Postgraduate/Professional Degree	2.7%

Figure 8
Experience Required - Current Vacancies

Experience Required	Percent
No Experience Required	54.7%
Less than 1 Year	10.1%
1-2 Years	24.1%
3-5 Years	9.5%
More than 5 Years	1.6%

Employers were asked their perceptions on the degree to which job applicants possessed soft, basic and occupational skills. In addition, employers were asked if applicants, who may or may not possess the necessary skills for the job vacancy, were being disqualified due to the results of controlled substance testing or background checks. The results for all employers are shown below in **Figure 9**.

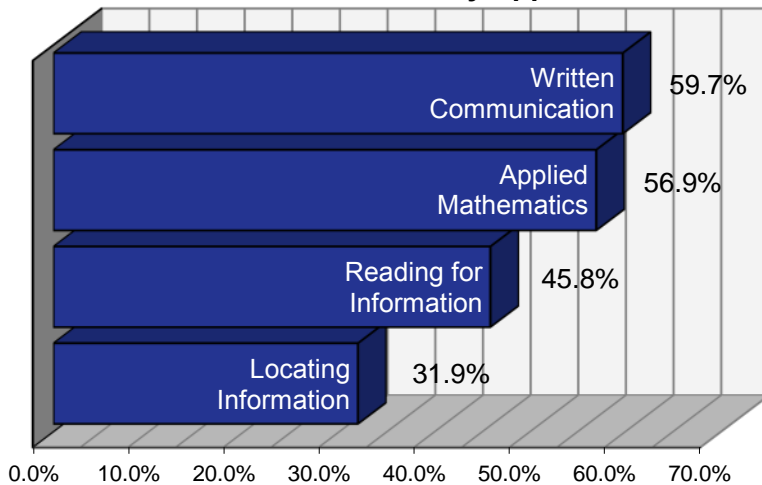
We can begin to analyze any workforce gaps by comparing the inventory of skills needed by employers and those skills held by the population of workers as presented in a Laborshed analysis. This gap is then analyzed and the necessary training and education programs can be formalized through a Skillshed study.

Figure 9
Perception of Applicants

Employer's Perceptions of Job Applicants	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
In general, applicants fulfill all necessary requirements for the job.	13.2%	34.5%	31.6%	14.6%	6.1%
In general, applicants possess the basic skills required for the job.	15.1%	38.9%	31.0%	11.3%	3.7%
In general, applicants possess the soft skills required for the job.	8.1%	29.3%	40.3%	17.3%	5.0%
In general, applicants possess the occupational skills required for the job.	9.2%	27.8%	33.5%	22.6%	6.9%
There is often a problem filling this position because applicants are disqualified due to controlled substance testing.	4.6%	6.9%	29.0%	20.0%	39.5%
There is often a problem filling this position because applicants are disqualified for failure to pass a background check.	6.7%	7.7%	29.8%	22.9%	32.9%

Figures 10, 11 and 12 break down basic, soft and occupational skills that employers reported were lacking by applicants to fill open positions.

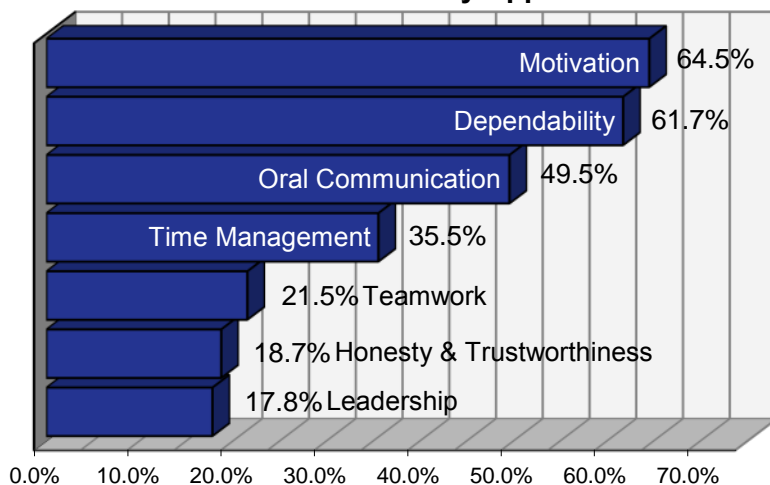
Figure 10
Basic Skills Lacked by Applicants



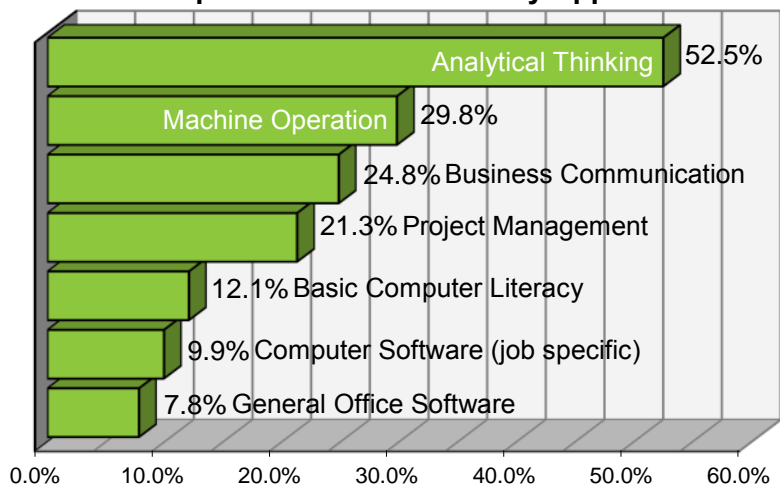
Basic skills are those skills developed during the elementary and middle part of an individual's education. These skills include literacy, numeracy (the ability to do arithmetic and reason with numbers), basic computer skills and organization. Over one-tenth (15.0%) of employers surveyed feel that applicants lack basic skills needed for the job. The Skilled Iowa initiative provides a means to benchmark and certify applicant's skills in Applied Mathematics, Reading for Information and Locating Information through the National Career Readiness Certificate testing program. More information on Skilled Iowa can be found at www.skillediowa.org.

Soft skills refer to skills associated with an individual’s habits, personality and character. Soft skills include timeliness, responsibility, integrity and self-esteem. Also included are interpersonal skills such as leadership ability, customer service and teamwork. Individuals with strong soft skills are better suited for working within an organization, as well as with customers and, therefore, are valued by employers. More than one-fifth (22.3%) of employers surveyed feel that applicants lack soft skills needed for the job.

**Figure 11
Soft Skills Lacked by Applicants**



**Figure 12
Occupational Skills Lacked by Applicants**



Occupational skills are the technical and know-how skills that apply directly to a job. Occupational skills are often referred to as “hard skills” and are primarily job-specific. In general, occupational skills include analytical skills, managerial ability, physical ability, knowledgeable and experience. The exact meaning behind these skills varies, depending on the job in question. Less than one-third (29.5%) of employers surveyed feel that applicants lack occupational skills needed for the job.

In the event that current or newly hired employees are lacking the soft, basic and occupational skills necessary to fill current job vacancies, employers were asked where they send employees to upgrade these skills. These results are listed in **Figure 13**.

**Figure 13
Where Additional Training is Offered**

Training Provider	Percent
In-house training	53.2%
Commercial training provider	21.6%
Employee self-directed training	19.2%
Online	15.4%
Trade school	13.4%
No training provided	13.3%
College/University	10.2%
Other	6.8%

Figure 13 indicates where employers are sending their employees for training to satisfy job requirements. When training is provided, most employers are currently using in-house training or commercial training providers. Almost all (89.3%) of employers report taking employee input under consideration when planning what training to provide. More than one-fourth (27.0%) of employers also expressed an interest in working more closely with local education providers to implement training programs.

Recruitment

The time span from when a job vacancy becomes available to the time it is filled is referred to as the recruitment period.

Figure 14 details the recruitment periods reported by employers within the State of Iowa.

Figure 14
Recruitment Period for Current Vacancies

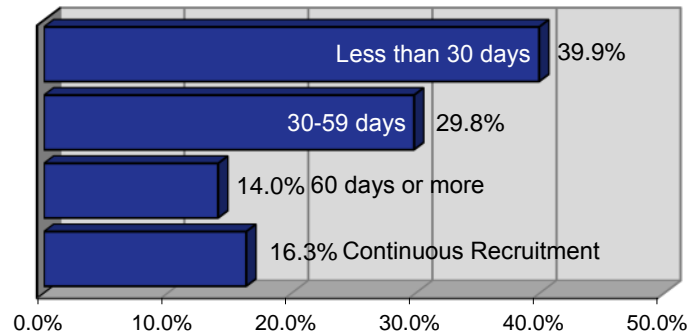
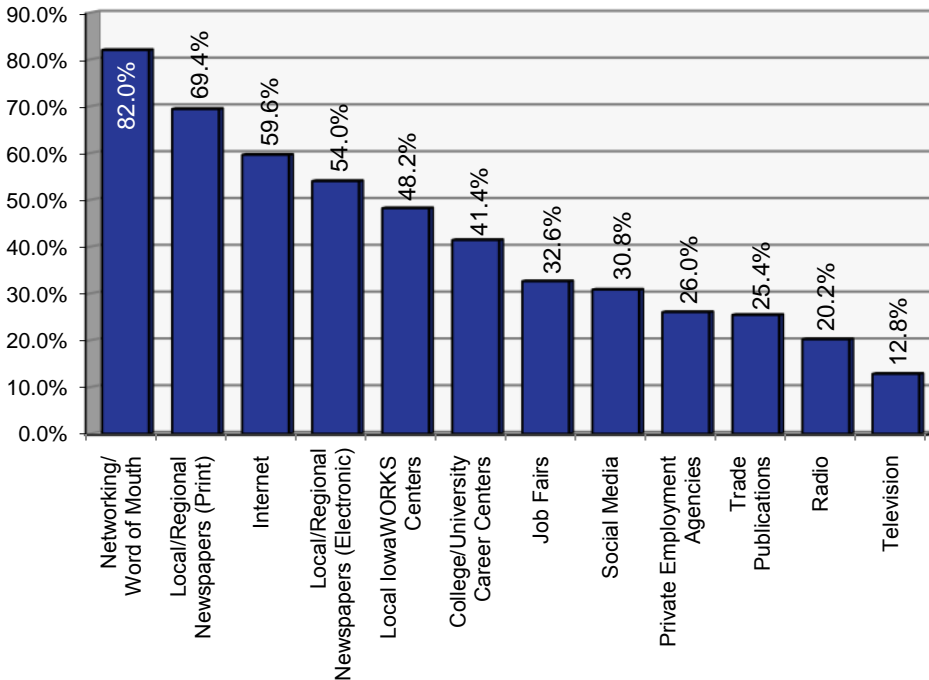


Figure 15
Recruitment Media Utilization



Employers who have a clear understanding of the job search resources used by workers in their respective industry will maximize their effectiveness and efficiency in attracting qualified applicants. Understanding and utilizing traditional and non-traditional advertising media will provide employers with a more focused and effective recruitment tool. Residents living in the state are exposed to numerous sources by which employers communicate job openings and new hiring. Therefore, it is important to understand what sources potential workers rely on when looking for jobs in the area.

Figure 15 details employer media use for recruitment purposes versus the media use of those looking for employment opportunities.

Employers utilized a variety of media to recruit potential employees. Respondents indicated that the most useful media outlets were networking/word of mouth, followed by print editions of local and regional newspapers, the internet, electronic editions of local/regional newspapers, local IowaWORKS centers, college/university career centers and job fairs.

Potential employees, on the other hand, were most likely to go first to the internet, followed by local/regional newspapers, networking/word of mouth, local IowaWORKS centers and private employment agencies when looking for jobs.

These mismatches in advertising versus search media usage can increase recruitment time periods and cost. More information on job search media usage can be found in the Cedar Valley Regional Partnership Laborshed Report (<http://www.iowaworkforce.org/lmi/labsur/cedarvalleypartnershipexecsum2011.pdf>).

Figure 16
Average Wages by Occupational Category

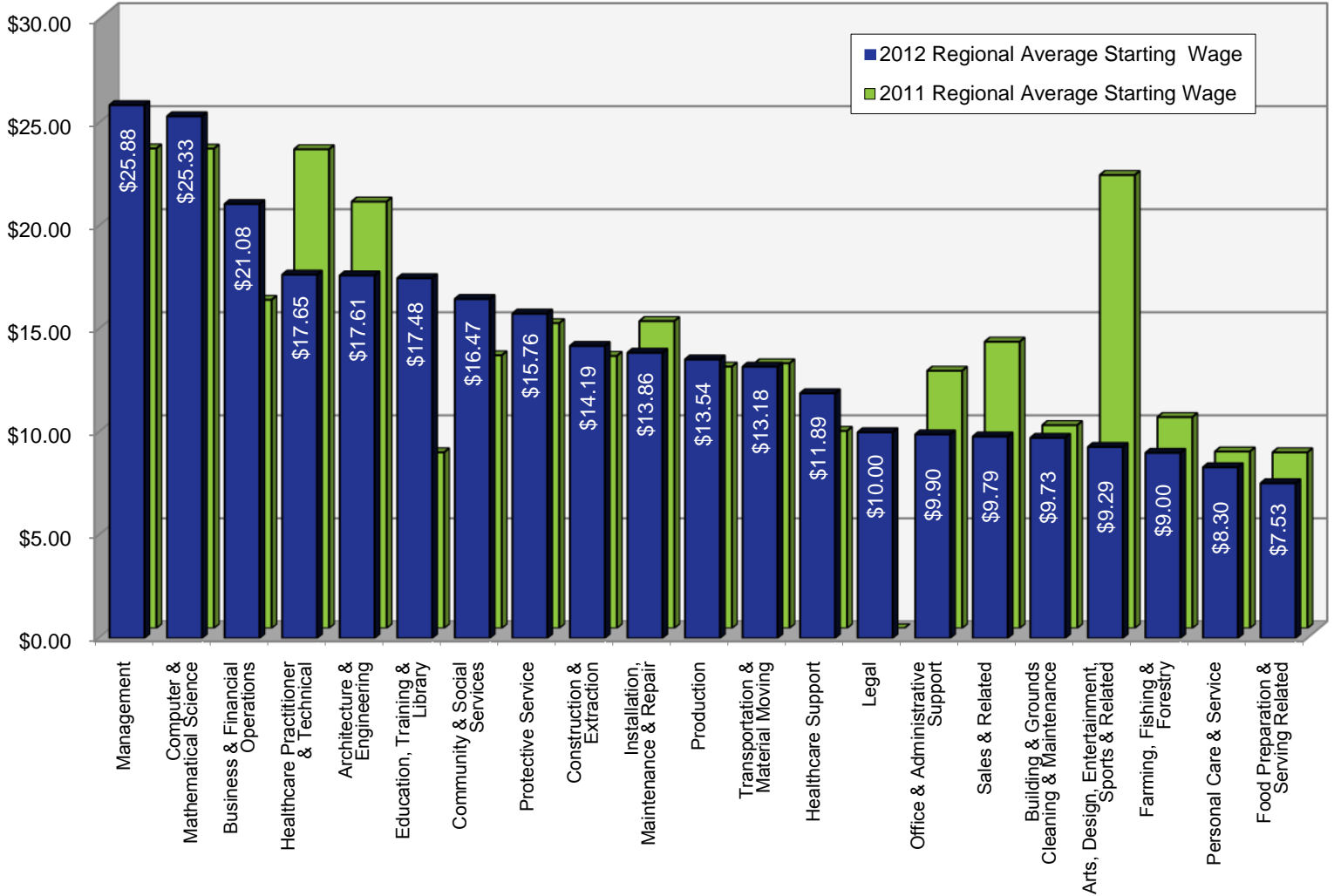


Figure 16 is the 2012 survey-reported average starting wages by occupational category with 2011 survey-reported average starting wages for comparison. This is important for job seekers in determining what jobs can provide a livable wage and have higher earning potential. Employers can use the information to determine their competitiveness with wages among all other categories. From the graph, we see that the management, computer & mathematical science and business & financial operations occupational categories pay the highest average starting wages. **Appendix A** (page 19) shows occupations in management; architecture & engineering; computer & mathematical science; business & financial operations; and healthcare practitioner & technical categories provide the highest entry level wages. More wage information including a comparison between average occupational wages to statewide average entry level wages and statewide average hourly wages can be found in **Appendix A**.

Benefits Offered

Employers may also use benefits to attract potential employees. Employers were asked about the types of benefits being offered for their current full time and part time job vacancies. These results are shown in **Figures 17, 18 & 19.**

Figure 17
Insurance Benefits Offered by Employers

Insurance Benefits Offered	Full-Time Positions	Part-Time Positions
Health/Medical	88.7%	9.6%
Prescription Drug Plans	77.7%	9.9%
Life Insurance	61.1%	11.8%
Dental	53.2%	10.1%
Accidental Death & Dismemberment	48.9%	8.7%
Short-Term Disability	45.4%	7.5%
Long Term Disability	42.4%	8.0%
Vision	29.1%	7.1%

Paid leave is another common form of employee benefit. Holiday leave varies by company in both the number of days and the particular holidays recognized. Some employers may also offer increased holiday pay in lieu of time off. Similarly, the specifics of maternity/paternity leave programs vary widely among different employers. Combined paid time off (PTO) refers to programs that allow employees to accumulate paid time off in a single pool to be used for either vacation or sick leave versus situations in which employees accrue time in separate pools.

Figure 19
Other Benefits Offered by Employers

Other Benefits Offered	Full-Time Positions	Part-Time Positions
Bonuses	64.7%	38.0%
Company Vehicle	59.9%	32.1%
Retirement Package	49.0%	19.8%
Flex Spending Accounts/Cafeteria Plans	43.5%	14.3%
Uniform Allowances	38.3%	21.0%
Profit Sharing/Stock Options	30.6%	10.2%
Tuition Assistance	29.9%	10.8%
Employee Assistance Program	17.7%	12.7%
Wellness Programs	17.0%	13.2%
Shift Differential Pay	16.2%	9.8%
Relocation/Moving Expenses	10.2%	0.6%
Childcare	2.4%	0.3%

The Regional Laborshed Analysis was used to identify current benefit packages being offered to employees within the state. These benefits include; health/medical insurance (90.1%), pension/retirement options (61.7%), dental coverage (43.3%), paid vacation (36.4%), vision coverage (27.3%), life insurance (24.0%), paid sick leave (19.1%), paid holidays (15.4%), disability insurance (14.4%), paid time off (7.3%) and prescription drug coverage (6.0%). Nearly three-quarters (73.2%) of the employers and employees are reported as sharing in the premium costs of health/medical insurance, 18.6 percent of the employers are reported as covering the entire cost of insurance premiums while 8.2 percent of the employers/employees have made other arrangements.

Insurance is a common benefit offered by employers. Different types of health care insurance (vision, dental, etc.) may be offered as part of an umbrella plan. Respondents were asked to indicate those separately if included in a combined package. Employers were not asked about workers compensation insurance as that program is intended to cover employer liability and not employee needs directly.

Figure 18
Paid Leave Benefits Offered by Employers

Paid Leave Benefits Offered	Full-Time Positions	Part-Time Positions
Holiday	91.2%	30.1%
Vacation	84.7%	22.8%
Bereavement/Funeral	71.7%	22.1%
Sick Leave	52.3%	17.9%
Personal Days/Floating Holidays	49.9%	16.5%
Maternity/Paternity	46.5%	16.6%
Combined Paid Time Off (PTO)	43.8%	14.3%
Training	40.5%	14.4%

In addition to insurance and paid leave employers offer a range of other benefits. Bonuses are common and are offered on a wide range of criteria including individual performance incentives, longevity awards and company-wide success. Company vehicle benefits include mileage reimbursement for the use of employee owned vehicles. Retirement packages may be either defined benefit (traditional pensions) or defined contribution (401K). Depending on the type of retirement package payments may or may not include either employer or employee matching contributions. Childcare benefits include both reimbursement programs and on-site facilities.

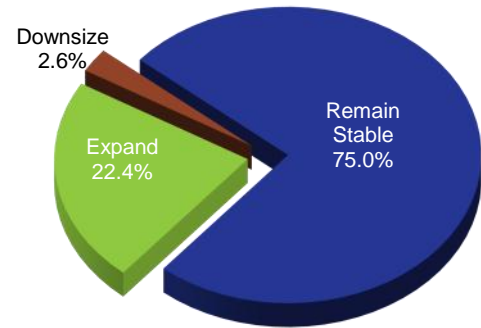
Future Plans

Employers were asked a series of questions about their plans for future payroll changes. They were asked whether they planned on increasing or decreasing the number of workers on payroll or if they planned to keep their workforce at its current strength, timeframe for the change, reasons for the change and jobs that would be affected by the change.

When analyzing reported workforce changes, it is important to note not only the specific reasons provided by employers but also the business and economic environment during which the employers were surveyed. Because of the great uncertainty surrounding the near-term economic health of the state, many employers were not able to state their workforce plans in any definite way.

Figure 20 shows the proportion of employers planning to expand, reduce or maintain the size of their workforce. Three-fourths (75.0%) of employers are planning to keep the size of their workforce steady while 22.4 percent of employers plan to expand their workforce and only 2.6 percent plan to reduce their workforce.

**Figure 20
Future Workforce Plans**



**Figure 21
Net Reported Payroll Change**

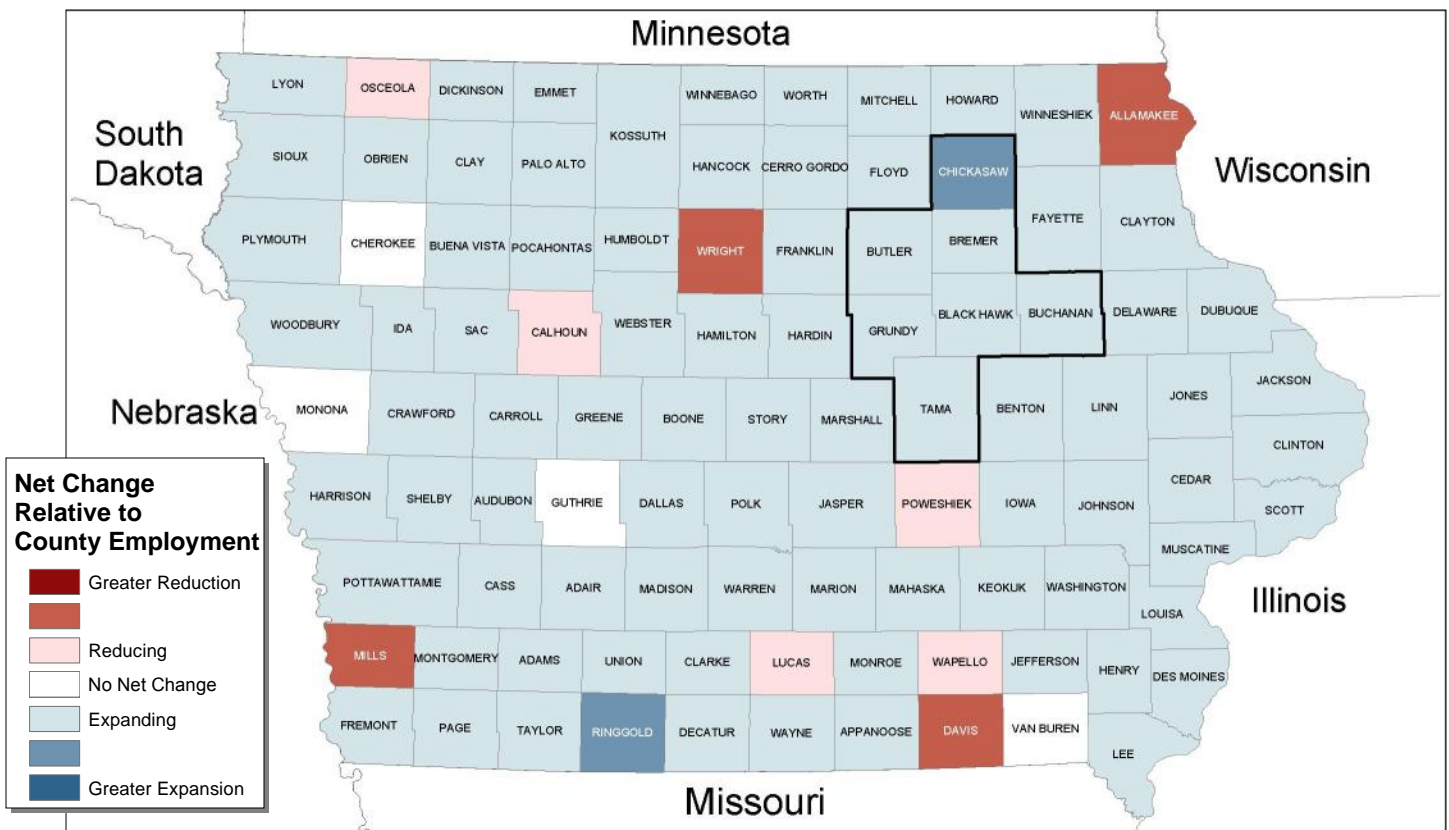


Figure 21 The Net Reported Payroll Change map shows the relative intensity of plans by employers to expand or reduce their workforces in each county in terms of total jobs to be created or cut, normalized by the total employment of the county. The darker red indicates greater expected reductions, relative to local employment, while the darker blue indicates counties in which employers plan to expand most heavily, relative to local employment. Counties in white indicate a net-zero or no response. Separate maps of expansion and reduction can be found in **Appendix B**.

Planned Workforce Expansion

Over one-fifth (22.4%) of the employers surveyed are planning to expand their workforce in the future. Of those employers planning on expanding their workforce, 55.6 percent indicated they were planning to do within 12 months, 33.3 percent indicated that they were planning to expand in one to two years, 7.4 percent are planning to expand in two to three years and 3.7 percent plan to expand in more than three years. Almost half (47.6%) of the companies planning to expand would be interested in working with a local education provider to set up a program for training/educating potential employees to fill these needs.

Figure 22
Reasons for Payroll Expansion
Ranked by Relative Importance

Reasons for Expansion
Increase share of existing market
Meet current market demands
Entry into new markets
Reduction of overtime
Insourcing of business operations
Opening a new location
Changes in tax or regulatory incentives
Merger/Acquisition

Respondents were asked to rank, in order of significance, possible reasons for expanding, maintaining or reducing the size of their workforce. **Figures 22, 23 and 27** (on page 13) show the average importance of reasons for each case.

Figure 22 compares employers' stated reasons for planning to increase the size of their workforce. The reasons indicated as being of the greatest importance in deciding to expand include plans to increase their share of existing markets, meeting current market demands and entering new markets.

Figure 23
Constraints Preventing Payroll Expansion
Ranked by Relative Importance

Figure 23 compares employers' stated constraints to increasing the size of their workforce. The reasons indicated as being of the greatest importance in preventing the expansion of workforces include cost of additional labor, uncertainty in current market demands and expenses related to benefits.

Impediments for Expansion
Cost of additional labor
Uncertainty in current market demands
Expense related to benefits
Competition within existing markets
Tax or regulatory issues
Lack of available skilled workforce
No desire to expand
Limited access to capital
Barriers to entering new markets
Insufficient space at current location/inability to find appropriate new location
Supply chain limitations
Planned merger/acquisition or business sale/transfer
Don't know steps/processes needed to expand

**Figure 24
Planned Payroll Expansion**

Industry	Percent of Each Industry	Percent of Total
Construction	30.3%	20.5%
Manufacturing	32.8%	18.8%
Wholesale & Retail Trade	19.8%	15.2%
Healthcare & Social Services	18.5%	8.9%
Administrative & Waste Services	47.4%	8.0%
Personal Services	25.8%	7.1%
Professional & Technical Services	23.3%	6.3%
Transportation & Warehousing	28.6%	5.4%
Finance, Insurance & Real Estate	22.2%	3.5%
Accommodation & Food Services	9.1%	1.8%
Information	22.2%	1.8%
Agriculture & Mining	7.1%	0.9%
Arts, Entertainment & Recreation	12.5%	0.9%
Public Administration	3.4%	0.9%
Educational Services	*	*
Management	*	*
Utilities	*	*

* Insufficient data reported

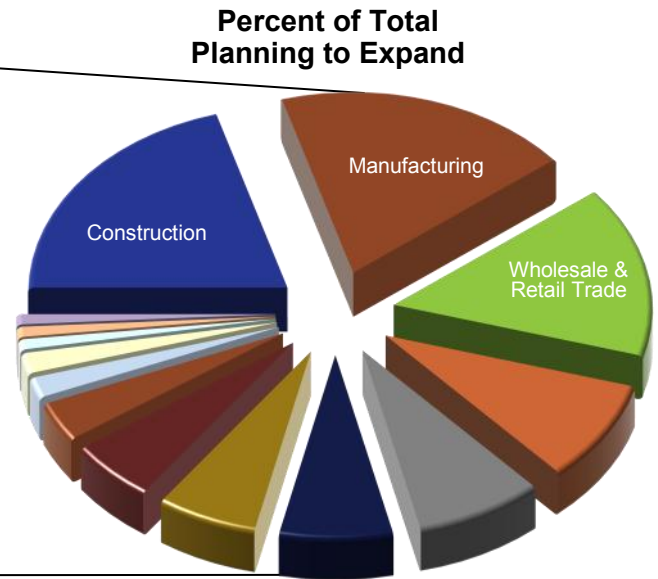


Figure 24 shows those employers who are planning to expand by industry. The “Percent of Each Industry” column shows what percentage of employers in each industry are planning to expand their payroll. The “Percent of Total” column shows what percentage of all businesses planning to expand their payroll is accounted for by each industry. For example, 30.3 percent of all businesses in the construction industry are planning to expand their payroll in the future. Those businesses within the construction industry make up 20.5 percent of all the businesses in the survey that are planning to expand their payrolls in the future.

**Figure 25
Timing of Planned Expansion**

Estimated Time for Expansion	Percent of Respondents
Within 12 months	55.6%
1-2 years	33.3%
2-3 years	7.4%
More than 3 years	3.7%

Figure 26 shows the percent of planned expansion by occupational category. Food preparation & serving related represents the largest category among current vacancies (**Figure 2**, page 2) and the category accounts for 13.7 percent of the planned payroll expansion positions. Office & administrative support occupations, likewise, represent 11.4 percent of current vacancies and employers planning to expand their payrolls indicated they plan on increasing payroll most frequently within this category. The occupational categories that will be most affected are: office & administrative support, production and food preparation & serving related.

Figure 25 shows the timeframe for those employers who are planning to expand their payrolls.

**Figure 26
Planned Payroll Expansion by Occupational Category**

Occupational Category	Percent of Planned Expansion
Office & Administrative Support	28.8%
Production	23.0%
Food Preparation & Serving Related	13.7%
Construction & Extraction	8.4%
Transportation & Material Moving	4.0%
Installation, Maintenance & Repair	3.9%
Personal Care & Service	3.1%
Building & Grounds Cleaning & Maintenance	2.4%
Healthcare Practitioner & Technical	2.4%
Computer & Mathematical Science	2.1%
Sales & Related	1.9%
Management	1.8%
Healthcare Support	1.4%
Business & Financial Operations	0.9%
Architecture & Engineering	0.8%
Arts, Design, Entertainment, Sports & Related	0.8%
Farming, Fishing & Forestry	0.3%
Protective Service	0.3%
Community & Social Science	*
Education, Training & Library	*
Legal	*
Life, Physical & Social Science	*

* Insufficient data reported

Planned Workforce Reduction

Very few (2.6%) of the employers surveyed are planning to reduce their workforce in the future. Of those employers planning on reducing their workforce, 75.0 percent indicated they were planning to do so within 12 months, 16.7 percent in the next two to three years and 8.3 percent plan to reduce the size of their workforce in three or more years. Almost half (45.5%) of the companies planning to downsize would be interested in working with a local education provider to set up programs to train/educate employees to transition to new jobs.

Figure 27
Reasons for Workforce Reduction
Ranked by Relative Importance

Figure 27 compares employer's stated reasons for planning to reduce the size of their workforce. The reasons indicated as being of greatest importance in deciding to reduce the size of workforces include reduced shares of existing markets, responding to reduced market demands and business sale or closure. Commonly cited other reasons for companies reducing their workforce include business principals preparing for retirement.

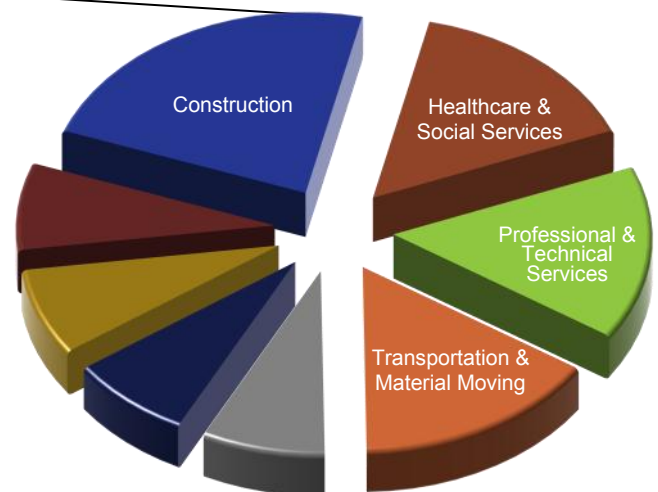
Reasons for Downsizing
Reduced share of existing market
Respond to reduced market demands
Business sale or closure
Reduced profits from current operations
Changes in tax or regulatory burdens
Outsourcing of business operations
Exit from existing markets or business division closing
Closing an existing location
Expenses related to benefits

The middle column in **Figure 28**, "Percent of Each Industry," shows what percentage of each industry is planning to reduce their payroll in the future. The far right column, "Percent of Total," shows what percentage of all businesses planning to reduce their payroll is accounted for by each industry. For example, 3.9 percent of all businesses in the construction industry are planning to reduce their payroll in the future. Those businesses within the construction industry make up 23.0 percent of all the businesses in the survey that are planning to reduce their payrolls in the future.

Figure 28
Planned Payroll Reduction

Industry	Percent of Each Industry	Percent of Total
Construction	3.9%	23.0%
Healthcare & Social Services	3.7%	15.4%
Professional & Technical Services	6.7%	15.4%
Transportation & Warehousing	9.5%	15.4%
Administrative & Waste Services	5.3%	7.7%
Agriculture & Mining	7.1%	7.7%
Manufacturing	1.6%	7.7%
Wholesale & Retail Trade	1.2%	7.7%
Accommodation & Food Services	*	*
Arts, Entertainment & Recreation	*	*
Educational Services	*	*
Finance, Insurance & Real Estate	*	*
Information	*	*
Management	*	*
Personal Services	*	*
Public Administration	*	*
Utilities	*	*

**Percent of Total
Planning to Downsize**



* Insufficient data reported

Retirement

Currently, there are 4,440 individuals over the age of 64 working throughout the Cedar Valley Regional Partnership area. They represent approximately 4.2 percent of the total workforce. The agriculture & mining (7.7%); educational services (6.6%); and wholesale & retail trade (5.6%) industries have the highest percentage of their workforce over the age of 64. There are more males than females in this portion of the workforce, with 52.6 and 47.4 percent respectively⁴.

Of those employees eligible to retire, almost all (95.4%) of them meet the current skill requirements of the positions they occupy. It's also notable that retirement eligibility requirements do vary by employer and industry.

While the number of retirees can be somewhat hard for employers to gauge as they look toward the future, **Figure 30** presents the annual estimated number of eligible retirees through 2016. Recognizing that some employees will not retire the year that they first become eligible, employers were asked not to double count employees who were eligible to retire in subsequent years.

There are an estimated 4,416 employees already eligible to retire who have remained in their positions. These retirement-eligible employees may be choosing to remain in the workforce due to their employer's retention efforts or due to personal reasons. According to the survey, an average of 1.0 percent of the region's workforce becomes eligible for retirement each year (1,104 divided by total employment of about 106,438 workers). Future analysis of trend data will help us understand how many retirement eligible workers are remaining in the workforce and for how long.

The future year estimates in subsequent reports will reflect employees who did not retire in the year they actually were eligible as they may choose to continue their employment because of retention efforts by employers.

Figure 30
Estimate of Those Newly Eligible to Retire

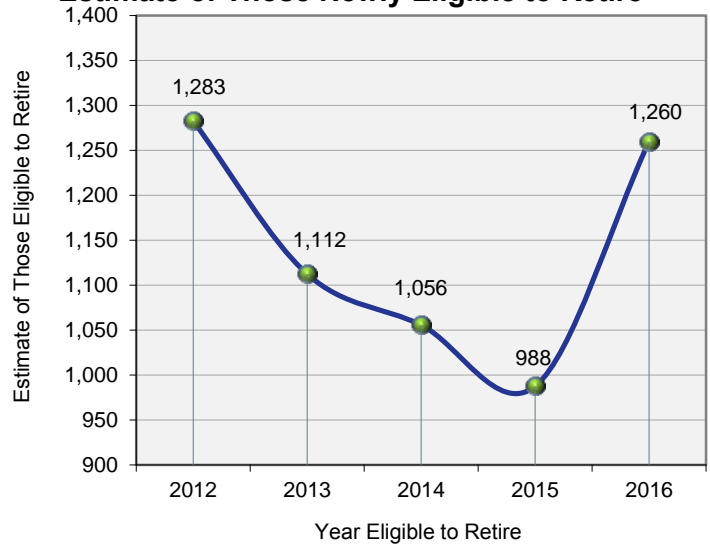
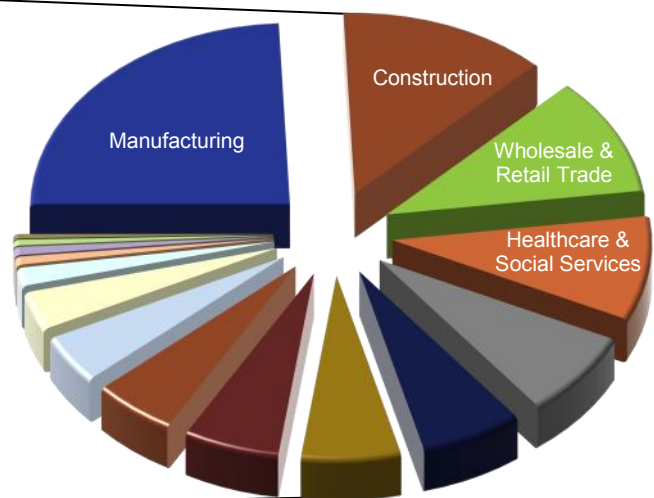


Figure 31 shows the estimated percentage of potential worker loss due to retirement by industry. In the next five years, there will be a significant number of workers eligible for retirement from the manufacturing, construction and wholesale & retail trade industries.

Figure 31
Retirement Eligibility by Industry

Industry	Percent of Expected Retirements
Manufacturing	24.3%
Construction	13.1%
Wholesale & Retail Trade	10.5%
Healthcare & Social Services	9.2%
Transportation & Warehousing	7.5%
Educational Services	6.4%
Professional & Technical Services	6.2%
Utilities	6.0%
Public Administration	5.2%
Administrative & Waste Services	4.3%
Finance, Insurance & Real Estate	3.4%
Personal Services	1.6%
Arts, Entertainment & Recreation	0.7%
Information	0.7%
Accommodation & Food Services	0.5%
Agriculture & Mining	0.4%
Management	*



* Insufficient data reported

Figure 32
Retirement Eligibility within Each Occupational Category

Occupational Category	Percent Affected by Retirements
Production	17.2%
Management	16.9%
Office & Administrative Support	15.1%
Construction & Extraction	8.3%
Transportation & Material Moving	7.8%
Installation, Maintenance & Repair	5.3%
Sales & Related	4.4%
Business & Financial Operations	4.3%
Education, Training & Library	3.2%
Healthcare Practitioner & Technical	2.5%
Computer & Mathematical Science	2.3%
Personal Care & Service	2.1%
Building & Grounds Cleaning & Maintenance	1.8%
Community & Social Science	1.8%
Architecture & Engineering	1.4%
Food Preparation & Serving Related	1.4%
Healthcare Support	1.2%
Protective Service	1.0%
Arts, Design, Entertainment, Sports & Related	0.7%
Legal	0.7%
Life, Physical & Social Science	0.4%
Farming, Fishing & Forestry	0.2%

Figure 32 shows the percent of eligible retirement within each occupational category. Production positions represent the second largest occupational category among current vacancies (16.0%) (**Figure 2**, page 2) and is the largest occupational category among jobs potentially affected by retiring workers. While food preparation & serving related occupations make up 16.2 percent of the state's current vacancies (**Figure 2**, page 2), they are not significantly affected by workers potentially retiring (1.4%). The occupational categories that will potentially be the most affected are: production, management and office & administrative support.

Almost three-fourths (72.8%) of employers indicated that they are engaged in retiree retention efforts. **Figure 33** details employer responses regarding the strategies used to retain retirees. Nearly half (46.9%) of the employers are offering retirees flexible work schedules; followed by increased wages and/or bonuses; a change in duties/responsibilities; additional training to upgrade their skills; more recognition for work done; benefits to part-time employees; seasonal work schedules; allowing telecommuting/working from home; benefits to retirees; and other efforts.

Figure 33
Retiree Retention Efforts by Employers

Efforts to Keep/Attract Retirees	Percent
Flexible work schedules	46.9%
Increase wages and/or bonuses	42.7%
Change in duties/responsibilities	32.2%
Offer additional training	27.0%
More recognition	17.1%
Benefits to part-time employees	13.3%
Seasonal work schedules	12.3%
Telecommuting/working from home	8.1%
Benefits to retirees	7.1%
Other	1.4%

Figure 34
How Companies Plan to Replace Those Who Retire

Replacing Vacancies Due to Retirements	Percent
Combination of hiring outside workers and promoting from within the company	44.4%
Hire workers from outside of the company	32.0%
Not currently planning to fill these positions	13.5%
Promote employees from within the company	10.1%

Figure 34 shows how companies plan to fill vacant positions left behind from those who have retired. Of those who reported, 44.4 percent plan to use a combination of hiring outside workers along with promoting from within the company, 32.0 percent plan only to hire workers from outside the company, 13.5 percent do not currently plan on filling these positions and 10.1 percent plan on only promoting from within the company.

Conclusion

The Workforce Needs Assessment gives us an idea of the demand for workers within an industry. The survey shows a relative high demand in the healthcare & social services, accommodation & food services and manufacturing industries. There are an estimated 477 vacancies in the healthcare & social services industry and another 460 in the accommodation & food services industry. Together these two industries account for over one-third (34.3%) of all vacancies in the Cedar Valley Regional Partnership area.

By occupational category the survey shows a relative high demand in the food preparation & serving related, production and office & administrative support occupational categories. Food preparation & serving related occupations account for an estimated 443 vacant positions and production accounts for another 437 positions. Food preparation & serving related and production occupations together make up almost one-third (32.2%) of the area's vacancies.

Nearly all (92.9%) of the current job vacancies reported require an education level at or below an associates degree. Less than one-tenth (7.1%) of current job vacancies require an undergraduate degree or higher. More than half (54.7%) of the current job vacancies reported require no experience, while 34.2 percent require experience totaling less than two years.

Positions open due to retirement have slightly higher education requirements. Over one-tenth (11.8%) of vacancies due to retirement require an undergraduate degree or higher. Similarly, positions open due to retirement require more experience. Less than one-fifth (17.6%) of vacancies due to retirement can be filled by those with no experience and 52.9 percent are open to applicants with some, but less than two years of, experience.

As a result of this survey, the region will be able to identify the gap between the existing workforce, the skills it possesses and the existing needs of industries. Identifying this gap will allow Iowa to assist community colleges, universities and other educational institutions in preparing upcoming workers with the necessary and appropriate skills to make them successful in the workforce.

This Workforce Needs Assessment Survey was conducted by Iowa Workforce Development's Regional Research & Analysis Bureau in partnership with the Iowa Association of Business and Industry.

Job Vacancies

The following section shows estimated vacancies for each reported job title utilizing data from the Workforce Needs Assessment Survey.

For more information use O*Net (<http://www.onetonline.org/>), which provides information on the following for each job title:

- Abilities
- Education
- Interests
- Job Tasks
- Job Zone
- Knowledge
- Related Occupations
- Skills
- Tools & Technology Used
- Wages & Employment - State/National
- Work Activities
- Work Context
- Work Styles
- Work Values

Figure 35
Estimated Reported Vacancies

Job Title	SOC Code	Estimated Vacancies
Combined Food Preparation and Serving Workers, Including Fast Food	35-3021	238
Computer-Controlled Machine Tool Operators, Metal and Plastic	51-4011	153
Customer Service Representatives	43-4051	153
Personal Care Aides	39-9021	148
Nursing Assistants	31-1014	142
Heavy and Tractor-Trailer Truck Drivers	53-3032	91
Bill and Account Collectors	43-3011	74
Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	51-4122	67
Food Servers, Nonrestaurant	35-3041	56
Construction Laborers	47-2061	50
Plumbers, Pipefitters, and Steamfitters	47-2152	39
Postsecondary Teachers, All Other	25-1199	39
Automotive Service Technicians and Mechanics	49-3023	33
Production Workers, All Other	51-9199	33
Amusement and Recreation Attendants	39-3091	28
Bus Drivers, School or Special Client	53-3022	28
Cooks, Institution and Cafeteria	35-2012	28
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	35-3022	28
Dietetic Technicians	29-2051	28
First-Line Supervisors of Food Preparation and Serving Workers	35-1012	28
Hairdressers, Hairstylists, and Cosmetologists	39-5012	28
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	49-9021	28
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	37-2011	28
Landscaping and Groundskeeping Workers	37-3011	28
Assemblers and Fabricators, All Other	51-2099	23
Emergency Medical Technicians and Paramedics	29-2041	23
First-Line Supervisors of Construction Trades and Extraction Workers	47-1011	23
Highway Maintenance Workers	47-4051	23
Machinists	51-4041	23
Registered Nurses	29-1141	23
Roofers	47-2181	23
Tool and Die Makers	51-4111	23
Architects, Except Landscape and Naval	17-1011	17
Carpenters	47-2031	17
Childcare Workers	39-9011	17
Computer Network Support Specialists	15-1152	17
First-Line Supervisors of Office and Administrative Support Workers	43-1011	17

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**Figure 35 (continued)
Estimated Reported Vacancies**

Job Title	SOC Code	Estimated Vacancies
Industrial Truck and Tractor Operators	53-7051	17
Inspectors, Testers, Sorters, Samplers, and Weighers	51-9061	17
Locker Room, Coatroom, and Dressing Room Attendants	39-3093	17
Maids and Housekeeping Cleaners	37-2012	17
Medical Secretaries	43-6013	17
Mental Health and Substance Abuse Social Workers	21-1023	17
Police and Sheriff's Patrol Officers	33-3051	17
Sales and Related Workers, All Other	41-9099	17
Sales Managers	11-2022	17
Software Developers, Systems Software	15-1133	17
Teacher Assistants	25-9041	17
Waiters and Waitresses	35-3031	17
Automotive Body and Related Repairers	49-3021	11
Bakers	51-3011	11
Billing and Posting Clerks and Machine Operators	43-3021	11
Bus Drivers, Transit and Intercity	53-3021	11
Community and Social Service Specialists, All Other	21-1099	11
Computer Network Architects	15-1143	11
Cutting and Slicing Machine Setters, Operators, and Tenders	51-9032	11
Dining Room and Cafeteria Attendants and Bartender Helpers	35-9011	11
Drywall and Ceiling Tile Installers	47-2081	11
Education Administrators, Postsecondary	11-9033	11
Electricians	47-2111	11
Farm Equipment Mechanics and Service Technicians	49-3041	11
Farmworkers, Farm, Ranch and Aquacultural Animals	45-2093	11
Gaming Dealers	39-3011	11
Insulation Workers, Floor, Ceiling, and Wall	47-2131	11
Light Truck or Delivery Services Drivers	53-3033	11
Maintenance and Repair Workers, General	49-9071	11
Mechanical Engineers	17-2141	11
Nurse Practitioners	29-1171	11
Packaging and Filling Machine Operators and Tenders	51-9111	11
Painters, Construction and Maintenance	47-2141	11
Painters, Transportation Equipment	51-9122	11
Plasterers and Stucco Masons	47-2161	11
Power Plant Operators	51-8013	11
Recreation Workers	39-9032	11
Retail Salespersons	41-2031	11
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	43-6014	11
Software Developers, Applications	15-1132	11
Teachers and Instructors, All Other	25-3099	11
Accountants and Auditors	13-2011	6
Administrative Services Managers	11-3011	6
Bartenders	35-3011	6
Business Operations Specialists, All Other	13-1199	6
Cashiers	41-2011	6
Civil Engineers	17-2051	6
Cleaners of Vehicles and Equipment	53-7061	6
Coin, Vending, and Amusement Machine Servicers and Repairers	49-9091	6
Computer Occupations, All Other	15-1199	6
Computer Programmers	15-1131	6
Cooks, All Other	35-2019	6
Cooks, Restaurant	35-2014	6
Cooks, Short Order	35-2015	6
Cost Estimators	13-1051	6
Crushing, Grinding, and Polishing Machine Setters, Operators, and Tenders	51-9021	6
Dental Assistants	31-9091	6
Education Administrators, Preschool and Childcare Center/Program	11-9031	6

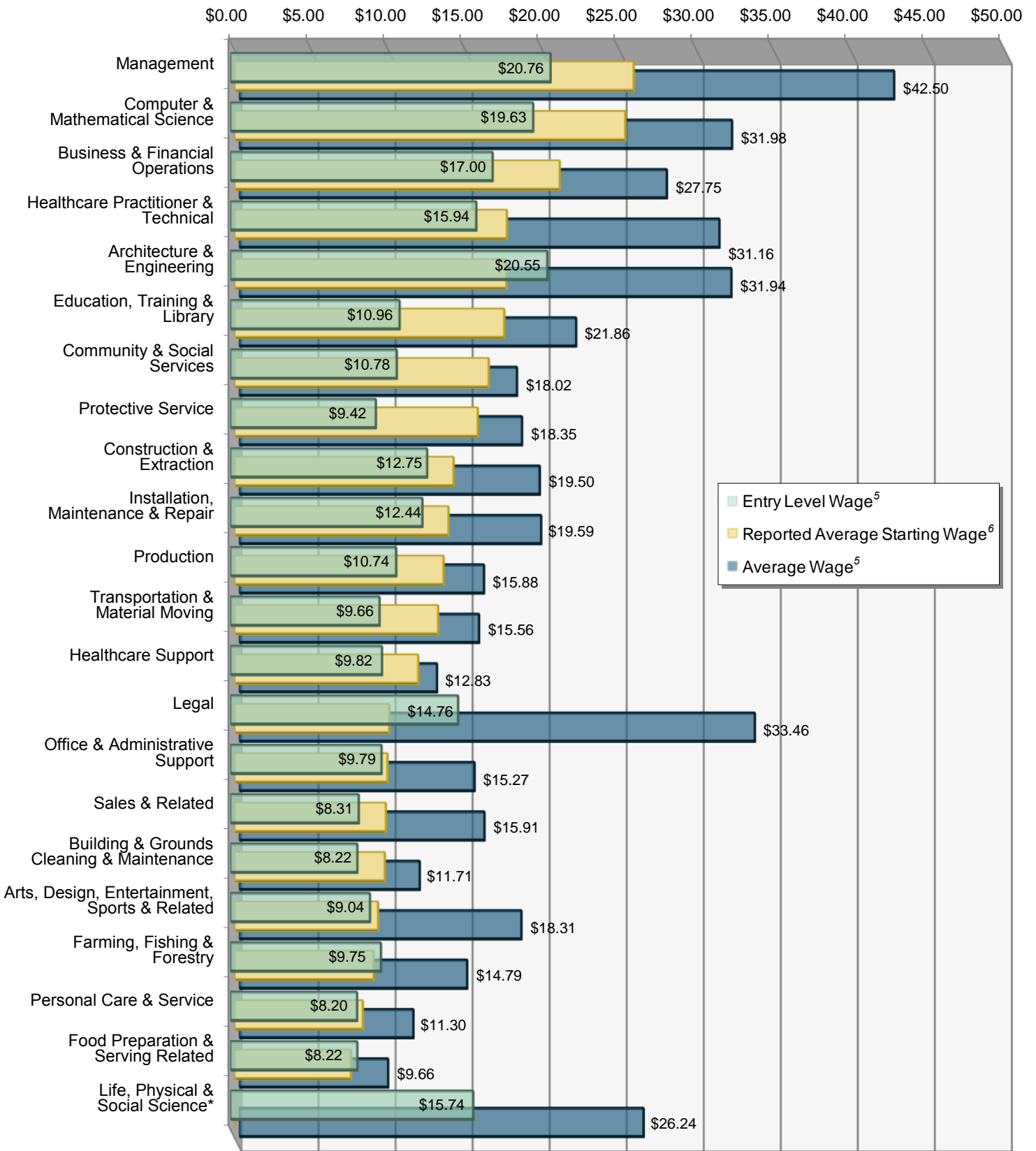
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**Figure 35 (continued)
Estimated Reported Vacancies**

Job Title	SOC Code	Estimated Vacancies
Engineers, All Other	17-2199	6
Financial Managers	11-3031	6
Firefighters	33-2011	6
First-Line Supervisors of Production and Operating Workers	51-1011	6
Food Preparation Workers	35-2021	6
Graphic Designers	27-1024	6
Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and	51-4033	6
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	35-9031	6
Hotel, Motel, and Resort Desk Clerks	43-4081	6
Industrial Machinery Mechanics	49-9041	6
Information and Record Clerks, All Other	43-4199	6
Installation, Maintenance, and Repair Workers, All Other	49-9099	6
Instructional Coordinators	25-9031	6
Laborers and Freight, Stock, and Material Movers, Hand	53-7062	6
Laundry and Dry-Cleaning Workers	51-6011	6
Lawyers	23-1011	6
Marketing Managers	11-2021	6
Massage Therapists	31-9011	6
Mechanical Drafters	17-3013	6
Medical and Health Services Managers	11-9111	6
Medical Records and Health Information Technicians	29-2071	6
Multimedia Artists and Animators	27-1014	6
Office Clerks, General	43-9061	6
Operating Engineers and Other Construction Equipment Operators	47-2073	6
Parking Lot Attendants	53-6021	6
Phlebotomists	31-9097	6
Physical Therapist Aides	31-2022	6
Production, Planning, and Expediting Clerks	43-5061	6
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	41-4012	6
Security Guards	33-9032	6
Sewing Machine Operators	51-6031	6
Social and Community Service Managers	11-9151	6
Social and Human Service Assistants	21-1093	6
Stock Clerks and Order Fillers	43-5081	6
Substance Abuse and Behavioral Disorder Counselors	21-1011	6
Title Examiners, Abstractors, and Searchers	23-2093	6
Travel Agents	41-3041	6
Water and Wastewater Treatment Plant and System Operators	51-8031	6
Web Developers	15-1134	6
Welders, Cutters, Solderers, and Brazers	51-4121	6
Estimated Total Vacancies		2,730

* Totals may vary due to rounding methods

Average Regional Starting Wages Compared to Statewide Entry Level & Statewide Average Hourly Wages

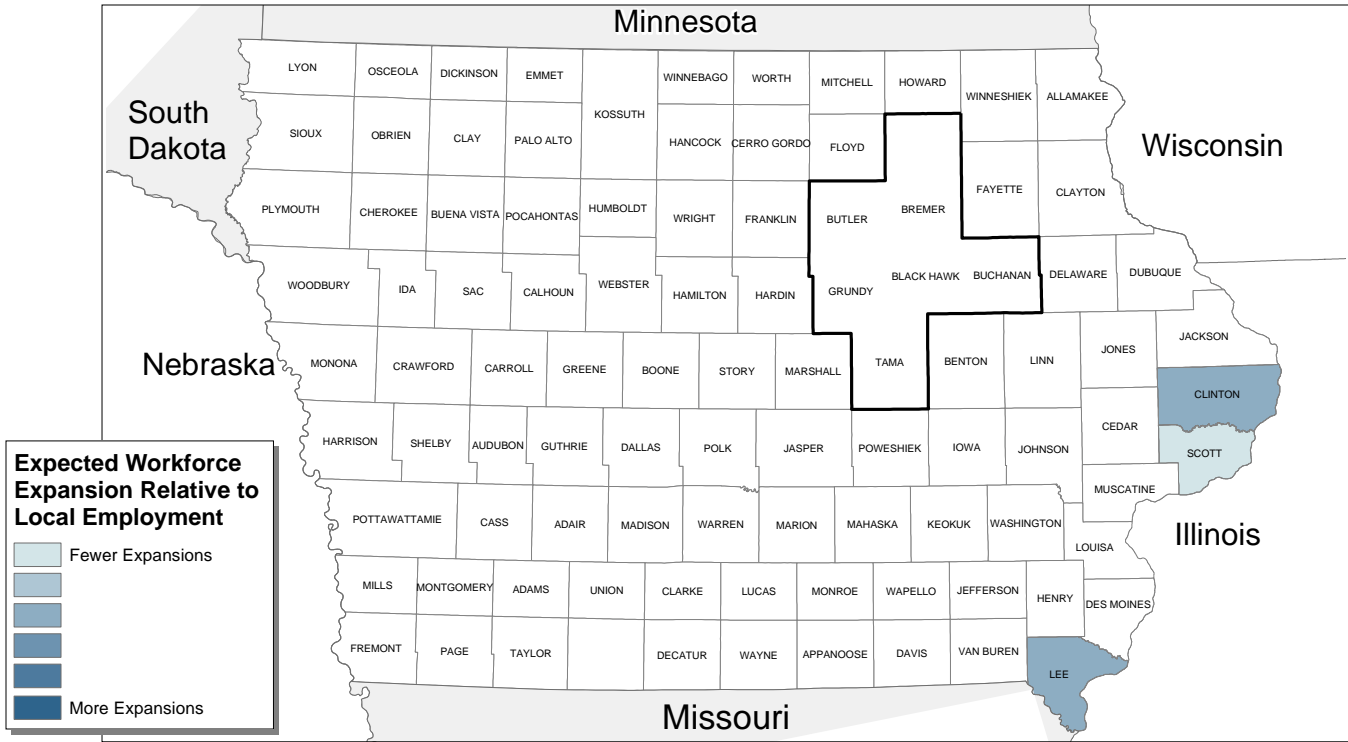


*Insufficient data reported

⁵Entry Level Wage and Average Wage taken from 2012 Iowa Wage Survey.

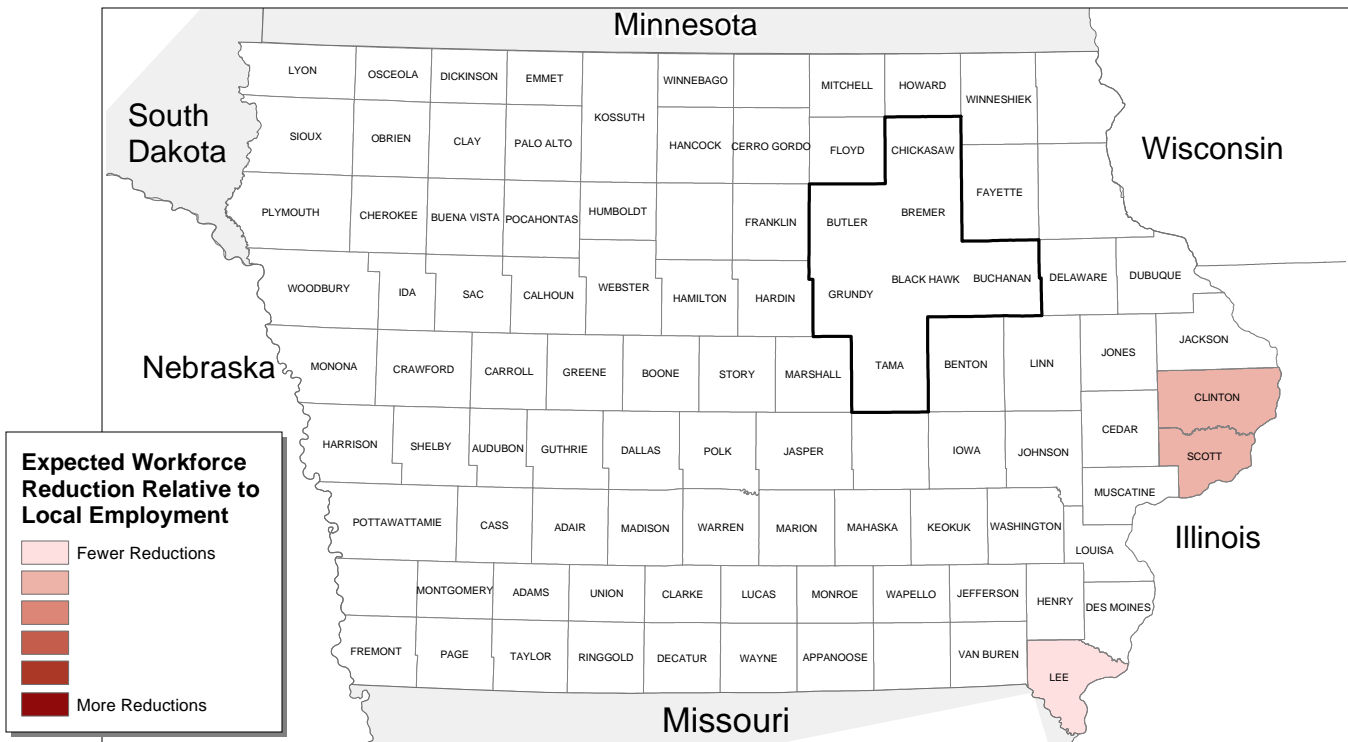
⁶Average Starting Wage is taken from the Workforce Needs Assessment survey data.

Reported Payroll Expansion



The Reported Payroll Expansion map shows the relative intensity of plans by employers to expand their workforce in each county, normalized by the total employment of the county. The darker the shade of blue, the greater expected new hires relative to local employment.

Reported Payroll Reduction



The Reported Payroll Reduction map (above) shows the relative intensity of plans by employers to reduce their workforce in each county, normalized by the total employment of the county. The darker the shade of red, the greater expected reductions relative to local employment.



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