

New Hampshire PY 2006 Workforce Information Grant Annual Report

Core Products and Services

The Economic and Labor Market Information Bureau of New Hampshire Employment Security, the designated workforce information entity for New Hampshire, supplied workforce information products and services in the following core areas:

1) Continue to populate the Workforce Information (formerly ALMIS) Database with state and local data.

- A. The Bureau continued to maintain the Workforce Information (formerly known as ALMIS - America's Labor Market Information System) database in New Hampshire. In addition to monthly updates of Current Employment Statistics program data; Labor Force Statistics; Consumer Price Index; and Building Permits, the following data sets were upgraded with statewide and sub-state data between July 2006 and June 2007:
- Quarterly Census of Employment and Wages (QCEW):
 - quarterly data for 2005 Q4 through 2006 Q3 at the NAICS Industry Group (4-digit) level, for the US, statewide, counties, and labor market areas; at the Domain level (goods-producing and service-providing) for cities/towns.
 - Annual Average QCEW: annual average data for 2005, at the NAICS Industry Group (4-digit) level for the U.S., statewide, counties, and labor market areas; at the NAICS Sector (2-digit) level for cities/towns.
 - Occupational Employment Statistics Wage estimates: based on May 2006 survey panels for Statewide, MSA, LMA, county, planning regions, one-stop office areas, and the U.S.
 - Short-term Industry and Occupational Projections, 2005Q4-2007Q4, and 2006Q2-2008Q2 for statewide.
 - Long-term Industry and Occupational Projections, and staffing patterns data, Statewide and County, 2004-2014.
 - Measures of Personal Income (BEA), statewide, annual 2001-2005; statewide and US by quarter, through 2007Q1 (revised); county (revised), annual 2003-2005.
 - American Community Survey, Per capita, median household, and median family income, statewide and US, 2000 - 2004.

- Census Median Household Income, statewide and US, 1984-2005 (revised); Median 4-Person Family Income, statewide and US, 1974-2004 (revised); Median Household Income, adjusted for inflation, statewide and US, 1984-2005 (revised).
- Population estimates (Census), statewide, county, minor civil division, and U.S., 2006; metropolitan/micropolitan areas, 2001-2005.
- Employer Database, municipality, 2007 first and second editions.
- Schools, Programs, and Program Completers, 2005-2006 school year.
- Transfer Payments (revised), 2003-2005, statewide, U.S, and counties.
- Property tax rates, 2005, municipalities.

B. The Bureau recognizes the value of local workforce information. In response to questions from the workforce development community, employers, and other users of workforce information, New Hampshire continues to populate the ALMIS database with extensive substate information. In addition, New Hampshire-specific data tables were added to the database to accommodate the New Hampshire Community Profiles. An annual update of this information was completed in May 2006.

2) Produce and disseminate industry and occupational employment projections.

New Hampshire continued to produce and disseminate state and sub-state industry and occupational employment projections using the methodology, software tools, and guidelines developed by the Projections Workgroup and the Projections Managing Partnership.

The primary activity for PY 2006 was the production of statewide short-term and sub-state long-term projections. Sub-state long-term projections were developed for the 2004 to 2014 period and statewide short-term projections for the 2006 to 2008 period.

More specifically:

A. The Bureau distributed a hard-copy edition of statewide long-term estimates of employment by industry, with 2004 base year employment and employment projected to 2014. These estimates incorporated annual average employment by industry (using NAICS codes) for the 1972-2004 time period. These estimates

were prepared for publication during PY2005, and printed and distributed in the beginning of PY2006.

- B. The Bureau completed sub-state, long-term estimates of employment by industry, with 2004 base year employment and employment projected to 2014.
- C. The Bureau completed sub-state, long-term estimates of occupational employment, with 2004 base year employment and employment projected to 2014. These projections are done by county in New Hampshire.
- D. The Bureau published and distributed in hard copy the 2004-2014 long-term sub-state industry and occupation projections publications during PY2006, including In Brief: Employment Projections by Industry and Occupation 2004-2014 by County, a series of county-based informational pamphlets. These are available on the Bureau web site, along with data tables.
- E. The ELMI Bureau populated the Workforce Information Database with these sets of projections to allow further public dissemination through NHNetwork, our automated Internet workforce information delivery system.
- F. The Bureau prepared two sets of short-term statewide estimates of employment by industry, with the latest available base quarter of information, forecast out eight quarters.

One set covered the time period 2005Q4-2007Q4. These projections were NAICS-based, and were available in January 2007. The second set of short-term projections covered the time period 2006Q2-2008Q2. This satisfied the ETA requirement to produce short-term, industry employment estimates during PY 2006 that covered the 2006-2008 time period. These projections estimates were NAICS-based and were delivered for use in America's Career InfoNet on June 19, 2007.

- G. The Bureau prepared two sets of statewide estimates of occupational employment, with the latest available base quarter of information, forecast out eight quarters.

One set covered the time period 2005Q4-2007Q4. These projections use SOC definitions, and were available in January 2007.

The second set of short-term occupational projections covered the time period 2006Q2-2008Q2. This set of short-term projections was featured in the July 2007 issue of New Hampshire Economic Conditions. This satisfied the ETA requirement to produce short-term, occupational employment estimates during PY 2006 that covered the 2006-2008 time period. These projected estimates use

SOC definitions and were delivered for use in America's Career InfoNet on June 19, 2007.

- H. The Bureau disseminated short-term industry and occupational projections products via printed medium. The Bureau published feature summary articles discussing short-term projections in the August 2006 issue of *Economic Conditions in New Hampshire* (2005Q2-2007Q2 projections), and in the January 2007 issue of *New Hampshire Economic Conditions* (2005Q4-2007Q4). These estimates, as well as the 2006Q2-2008Q2 projections, were also made available on our web site in .pdf format. The Bureau also made detailed occupational projections available on the web site in .xls format.
- I. The Bureau prepared the *New Hampshire Job Outlook and Locator* publication. This publication is a tool that can help job seekers, career planners, and others connect to occupations by identifying the industries that most commonly employ workers in a specific occupation. Based on a long-term look at New Hampshire's economy, more than 650 occupations are included. Each has a corresponding Standard Occupational Classification code and description, 2005 average hourly or annual wage, estimated 2004 employment, projected 2014 employment, projected growth rate for 2004-2014, estimated annual openings, education and training requirements, and the employing industries. The hard copy publication was also made available on our web site in .pdf format.

3) Publish an annual economic analysis report for the governor and the SWIB.

The Economic and Labor Market Information Bureau published a detailed economic summary report entitled *Looking Forward – Preparing for the future New Hampshire economy*. Its purpose was to inform the workforce-development policy and related investment decisions by the governor, the legislature, the New Hampshire Workforce Opportunity Council (the state's workforce investment board), local workforce investment advisory groups, and additional partners including community colleges, economic development organizations, and other workforce development stakeholders. The information contained in the report is also useful to business people and private individuals who have a stake in the New Hampshire economy, whether they are involved in business or career planning, or in general economic research and analysis.

Looking Forward included economic trend indicators such as estimates of jobs by industry and resident labor force levels, and measures of unemployment. Unemployment was described in terms of the occupational and demographic characteristics of the unemployed. Industry location quotients suggested which industries are more likely to thrive in the New Hampshire economy and which are not. Occupational employment projections and skills-based employment projections

predicted the future staffing needs of New Hampshire employers. State wage trends in covered employment were compared to regional and national trends. These comparative wages and wage trends are important for both businesses and workers to consider when making relocation and workforce development decisions.

In addition to the annual economic summary report, The Bureau also published its annual *Vital Signs*. This annual review presents information about significant aspects of the state's economic, social, and environmental structure. In keeping with the intent of the Employment and Training Administration, The Bureau includes information from numerous other sources, ranging from federal agencies and other state agencies to private industry groups and institutes. Data for four years is collected and presented in eighteen chapters. Each chapter is accompanied by a capsule summary of recent events.

Together, the *Looking Forward* and *Vital Signs* publications satisfy the requirement to produce an annual economic summary for the governor and the workforce investment board.

4) Post products, information, and reports on the Internet.

New Hampshire has posted all of its grant produced products, reports, and other workforce information on the New Hampshire Employment Security Economic and Labor Market Information Bureau web site. This facilitates product and information use by the workforce investment system, including partners, researchers, other allied agencies, and other customers.

During Program Year 2006 the New Hampshire Employment Security Economic and Labor Market Information Bureau's web site experienced over 1,300,000 hits for its various products.

- The most popular product by far is *Community Profiles*, an on-line summary of socio-economic information at the city/town level. There is a high demand for the local information in this product. The Bureau annually updates individual community profiles using a mail survey, and populates the profiles with data from other administrative databases.
- The product with the second largest number of website hits was *Licensed, Certified, and Registered Occupations in New Hampshire*. This is updated on a two-year cycle. It was last updated during PY2005, and will be updated again during PY2007.
- The product with the third largest number of website hits was *Occupational Employment and Wages*.

- Next most popular was a series of occupational brochures, *So You Want To Be...* Each brochure highlights an occupation expected either to be among the fastest growing (rate of growth) in New Hampshire, or among the occupations expected to add the most jobs based on the latest NH occupational projections period. While some information is extracted from sources such as the *Occupational Outlook Handbook*, much of the data presented is New Hampshire-specific, and is drawn from the body of workforce information generated by the Bureau.
- Among the top ten items in terms of website hits were *New Hampshire Economic Conditions*; the monthly labor force statistics news release; *Employment Projections*; *Local Area Unemployment Statistics* data; and *Looking Forward*, the economic and workforce summary report prepared for the governor and workforce development system.

5) Partner and consult on a continuing basis with workforce investment boards.

Grantees are required to partner and consult on a continuing basis with the SWIB and LWIBs in order to identify and provide needed information support for workforce investment strategic planning and response to rapidly changing economic conditions and state and local initiatives. The needs identified through such consultations must be documented in the grant file.

November 2006 – Presentation to NH Department of Resources and Economic Development Business Relations Team – New Hampshire Economic Trends – a Labor Market Perspective

December 2006 – Presentation to the NHES Employer Service Representatives – How Can Labor Market Information Help You Help Your Clients?

May 1, 2007 – formal consultation with and support of Lakes Region Planning Commissions for information.

May 17, 2007 – formal consultation with Workforce Opportunity Council, Inc. Throughout Program Year 2006 there were numerous ongoing contacts and consultations.

June 2007 – formal consultation with and support of NH Community Loan Fund for information.

July 12, 2007 – formal consultation with New Hampshire Department of Resources and Economic Development, Division of Economic Development. Throughout Program Year 2006 there were numerous ongoing contacts and consultations.

6) Conduct special studies and economic analyses.

When needed, states shall conduct special state, local, or sub-state regional studies and economic analyses to provide information support for communities in economic transition, state and sub-state workforce development initiatives, and responses to major layoffs or disasters.

A. Special studies and economic analysis.

The Bureau continued to develop workforce and economic information through use of our New Hampshire econometric model. This model is used to analyze the short- and long-term impacts of economic changes, plant closings, proposed economic development, and other exogenous events. These economic impact studies provide information about the impacts of significant plant shutdowns or development, and the anticipated impact on occupational demand and workforce development requirements. The Bureau identifies types of workers who would likely be affected by negative economic changes, and predicts the types of workers needed in response to business openings and specific economic development.

- The Bureau renewed a support and maintenance contract with the developer.
- In June 2007 the Bureau released *Coös County Perspectives . . . The Federal Prison*, a follow-up to *Coös County Perspectives Pulp and Paper . . . Parks and Prisons*, prepared at the request of the Berlin local office of New Hampshire Employment Security. Once the formal decision to build a new federal prison in Berlin was made, questions arose about the prison's expected impact, both in terms of construction and staffing. The *Federal Prison* paper was designed to help the local community understand and prepare for this economic event.

The Bureau published and distributed *Finance & Insurance Industries in New Hampshire* in August 2006. The financial sector is a large employer in New Hampshire, and includes many self-employed. Therefore, an understanding of the impact of the finance and insurance industries, their growth, and employment patterns would be of value for many individuals considering employment in the sector. Even though the employment level of Finance and insurance is smaller than that of either Retail or Manufacturing, and its impact less recognized than the more publicized tourism and high-tech related industries, this sector contributes a large share of employment and wages to the New Hampshire economy. Continued job growth in this sector relies on the availability of qualified and skilled workers for its businesses and continued demand for its services. This paper was prepared with data generated using the New Hampshire REMI economic model.

The Bureau published and distributed *Hospital Construction Projects in New Hampshire* in January 2007. This study revolved around the economic contributions of the Hospital industry and the construction projects directly related to their physical growth. A hypothetical scenario of holding Hospital employment constant at the 2004 level was done to analyze the total impact the Hospital industry has on the state as a whole. Ten large expansion projects in six counties were followed to evaluate the changes that occurred within their local areas (counties).

B. Support of economic development and retention.

The Bureau continued its support of economic development and retention efforts by the Department of Resources and Economic Development.

- This support consists primarily of informational packets detailing in- and out-commuting patterns for an area, area labor force statistics, area wages for specific occupations, and area active applicants for specific occupational codes. During this program year the requests for information have ranged from metal stamping and machinists to call center operators to software and computer engineers.

The Bureau researched and prepared *Coös County Perspectives: The Federal Prison*, using the New Hampshire econometric model. This project was undertaken because there was a proposed project for a potential siting of a medium security federal prison in Berlin.

- The Bureau's analysis discussed the impact of the building and staffing of a new federal prison. It examines, in detail, this impact to help local planners and businesses and the community at large understand and prepare for this possibility in the Coös County economy.

January 2007 - Presentation to the joint New Hampshire House and Senate Finance and Ways and Means Committees --New Hampshire Labor Market Trends

March/April 2007 -- supplied data to the Workforce Opportunity Council for inclusion in WIRED grant application

April 2007 -- Rochester NH area Development Packet for Somersworth LO and its work with employer

May 2007 -- Franklin NH area Development Packet for Laconia and Concord LOs and their work with economic developers

May 2007 - Participated and presented at ETA Regional Workforce Information Driving Regional Economics Conference

May 2007 - Presentation to the New Hampshire Senate Ways and Means Committee - New Hampshire Economic Trends

June 2007 - Presentation to the Statewide Health Council - How Changing Demographics Should Affect the Healthcare Workforce in New Hampshire 2004-2014.