

CRANBERRY AREA WORKFORCE AND JOB ACCESS STUDY

DRAFT Preliminary Findings

Background

The Three Rivers Workforce Investment Board (TRWIB) was established under the federal Workforce Investment Act of 1998 for the purpose of overseeing and coordinating employment and training strategies in Pittsburgh and Allegheny County. The TRWIB recognizes the critical role that transportation, childcare, and affordable housing can play in meeting employers' workforce needs and enabling individuals to obtain and retain good jobs. The TRWIB promotes these issues in several ways including: the TRWIB's Workforce Environment Committee; legislative activities related to transportation policy; as a member of the Allegheny County Access to Work Taskforce and Regional Access to Jobs Work Group; and through the Cranberry Job Access Reverse Commute (JARC) project. Likewise, the CareerLink system has acknowledged the link between transportation and workforce through fostering a partnership between the Airport Corridor Transportation Association (ACTA) and the Allegheny West Comprehensive CareerLink site at Robinson Town Center. While the TRWIB believes that planning and coordination between workforce development, economic development, and transportation planning are critical to matching people with jobs, it also acknowledges that communities within the region have their own unique issues that need to be understood before promoting one particular job access strategy. Recently the TRWIB has tried to understand the issues that impact access to jobs in the Cranberry area.

Why Cranberry?

The Cranberry area has experienced significant population and employment growth in recent years. Cranberry is auto-dependent and jobs in the area are not easily accessible by public transit creating "spatial mismatch" between job opportunities and workers who rely on public transit. In 2001, the TRWIB partnered with Port Authority on a Job Access Reverse Commute (JARC) project aimed at increasing access for City of Pittsburgh residents to jobs in Cranberry. Through the JARC funding, a Mobility & Workforce Development Specialist position was created. The goal of the Cranberry JARC was to identify the barriers that impede qualified individuals from accessing job opportunities in the Cranberry area and developing strategies to address these barriers. An express bus has been established for bringing people from Cranberry into the City of Pittsburgh for jobs and then reversing the commute back to Cranberry so that Pittsburgh residents could access Cranberry's job opportunities. The reverse commute routes have served in bringing people into Pittsburgh for jobs. However, the bus alone has not served in matching City of Pittsburgh residents with jobs in Cranberry for reasons including location and frequency of routes. In the spring of 2003, the TRWIB decided to take a step back to try to develop a better picture of:

- The employment opportunities that exist in the Cranberry area;
- The workforce challenges of Cranberry area employers;
- The characteristics of the workforce in the Cranberry area and surrounding communities;

- And; Information about transportation, childcare and affordable housing available to workers who wish to access jobs in the area.

Beginning in the summer of 2003, the TRWIB dedicated staff and hired two interns to conduct a study to look at these issues. Building on partnerships that had already been established with Port Authority of Allegheny County, the Southwestern Pennsylvania Commission (SPC), Cranberry Township and Butler Transit, this study is intended to provide information that will not only inform the Cranberry JARC effort but will also inform Cranberry Township's upcoming comprehensive planning process and the Cranberry Area transit study that is planned for the area. This analysis was also intended to enable the TRWIB's Workforce Environment Committee to develop methods for collecting and analyzing information about workforce and supportive services that could be used in other parts of the region. The following outlines how the study was conducted and gives some preliminary study findings.

Study Methodology

The study focuses on job opportunities and workforce needs of the Cranberry/Mars/Warrendale area ("Cranberry Area")¹ and has three main components:

- 1) An analysis of available secondary data to identify job opportunities that exist in the Cranberry area, the workforce characteristics of residents in the Cranberry area and surrounding three-counties and transportation, childcare, and affordable housing that are in place to support workers in accessing jobs in the Cranberry area.
- 2) Telephone interviews with over 100 employers to determine:
 - If Cranberry area employers are having difficulty attracting and retaining workers;
 - If so, what kinds of workers are they have trouble attracting and retaining;
 - If they perceive a lack of transportation, childcare or affordable housing as playing a role in their inability to attract and retain workers;
 - The geographic areas from which they recruit employees;
 - Their reasons for locating in the Cranberry area and whether workforce and job access issues were considerations;
 - Characteristics of their employees including education levels and commuting patterns;
 - And, their perceptions of the need for initiatives aimed at increasing the transportation, childcare and housing opportunities available to their employees.
- 3) Information from both jobseeker surveys and Cranberry employee surveys that we're conducted in 2002 under the Cranberry JARC project will also be incorporated into the research project.

Preliminary findings from the secondary data are included below. Where appropriate, relevant findings from employer surveys are noted.

¹ Included in zip codes 15086, 16046, and 16066 and census tracts 9120, 9121.01, 9121.02, 9122, 9123, and portions of 9123, 4110 and 4090.

Secondary Data Analysis

Industrial and Occupational Composition of the Cranberry Area

Due to confidentiality issues, employment data is not publicly available at the sub-county level. The following information about employers and employment in the Cranberry Area is based on estimates conducted by the Pennsylvania Department of Labor and Industry's Center for Workforce Information and Analysis using 1998 ES202 data.

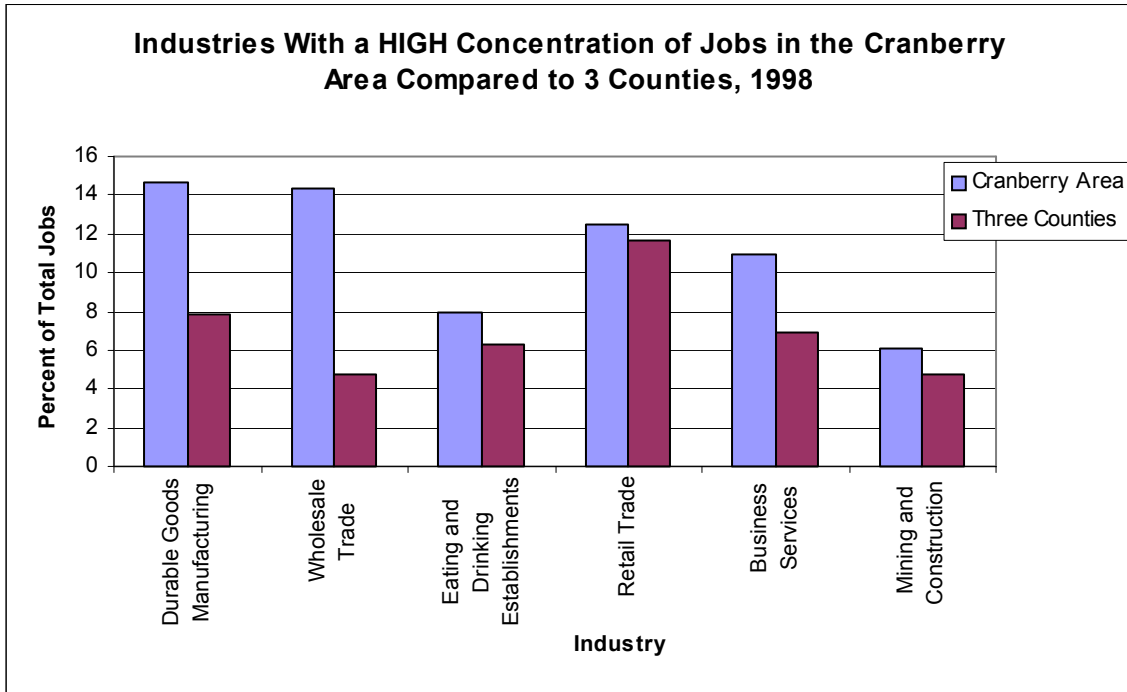
- There are over 1,000 employers and over 19,000 jobs in the Cranberry Area. These employers represent approximately 2.5% of the employers in Allegheny, Beaver and Butler Counties and approximately 2.4% of the jobs in these three counties combined.
- As the table below shows, models developed by the Center for Workforce Information and Analysis indicate that the predominate industries in the Cranberry Area are: **manufacturing; wholesale trade; retail trade; business services and other services; and, eating and drinking establishments.** Combined these industries make up 75% of employment in the Cranberry Area. These industries make up about 50% of employment in Allegheny, Beaver and Butler counties combined.

Table 1. Number of Employers and Jobs by Major Industry Sector, Cranberry Area, 1998

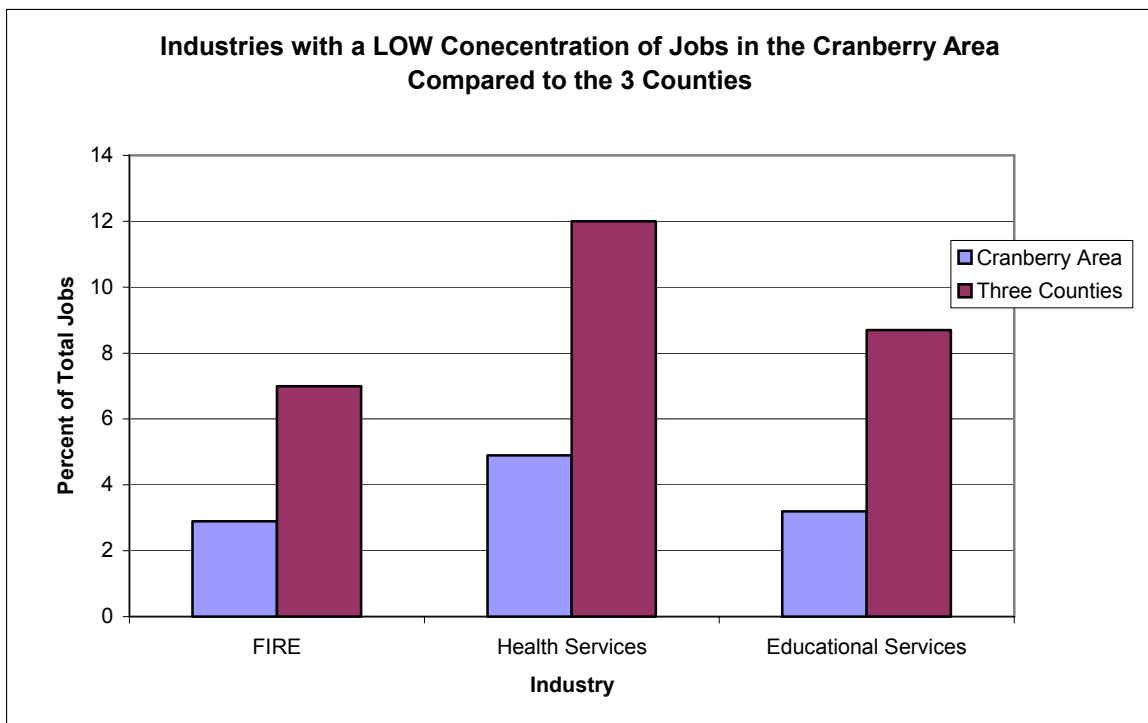
Industry Group	# of Employers	% of Total Employers	# of Jobs	% of Total Jobs
Agriculture, forestry, and fishing	24	2.1	98	0.5
Mining and Construction	136	12.0	1,193	6.1
Manufacturing—durable goods	56	4.9	2,876	14.7
Manufacturing--nondurable goods	22	1.9	557	2.8
Transportation	34	3.0	877	4.5
Communications	5	0.4	4	0.0
Public utilities	8	0.7	126	0.6
Wholesale trade	153	13.5	2,814	14.4
Eating and drinking places	58	5.1	1,571	8.0
Retail trade (excl. eating & drinking places)	132	11.7	2,452	12.5
Finance, insurance, and real estate	83	7.3	577	2.9
Personal services	34	3.0	302	1.5
Business services	87	7.7	2,131	10.9
Health services	73	6.4	969	4.9
Legal services	8	0.7	18	0.1
Educational services (public and nonpublic)	16	1.4	628	3.2
Other services	198	17.5	2,196	11.2
Government	6	0.5	193	1.0
TOTAL	1,133	100	19,582	100

Prepared by: Center for Workforce Information and Analysis Pennsylvania Department of Labor and Industry May 1, 2003

- The charts below show industries in which the Cranberry Area has HIGH and LOW concentrations of jobs compared to the Allegheny, Beaver and Butler Counties combined:



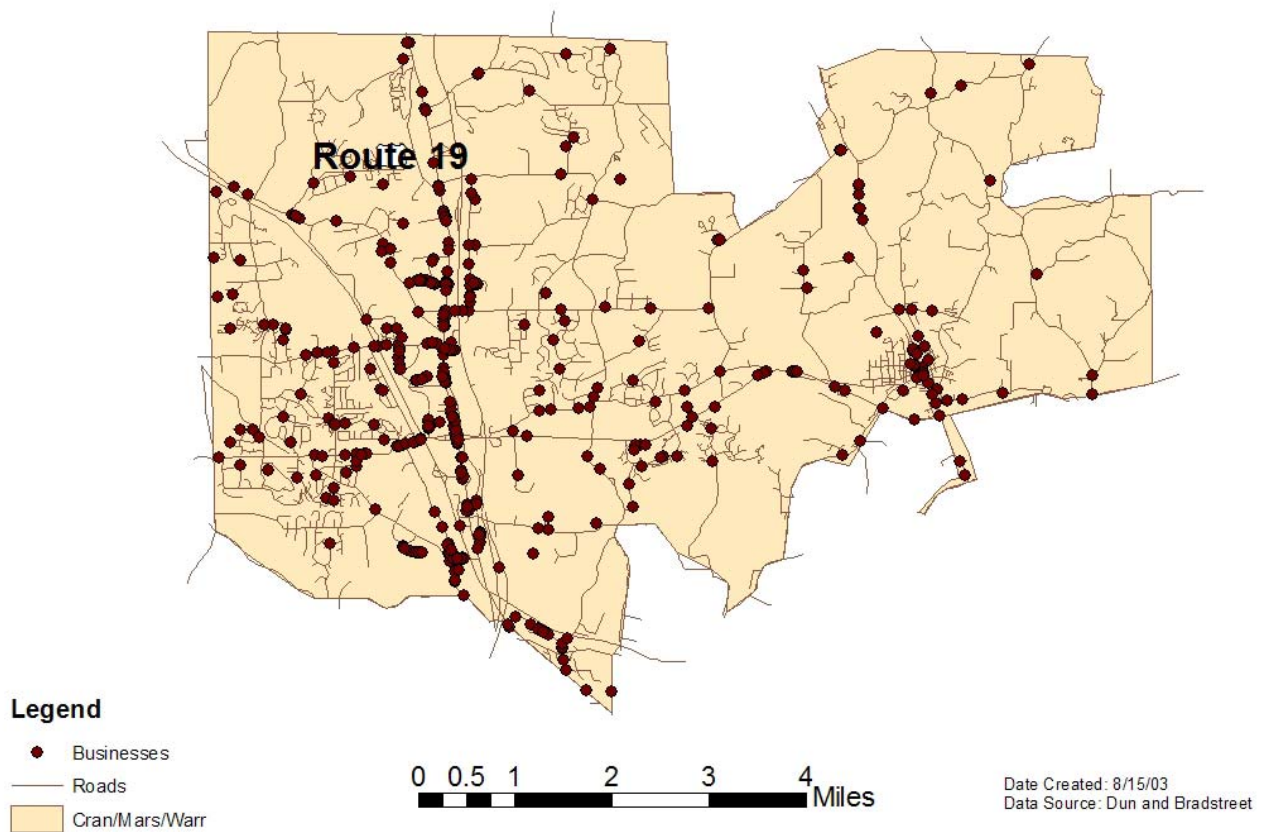
Source: 1998 ES202 data from the Center for Workforce Information and Analysis Pennsylvania Department of Labor and Industry



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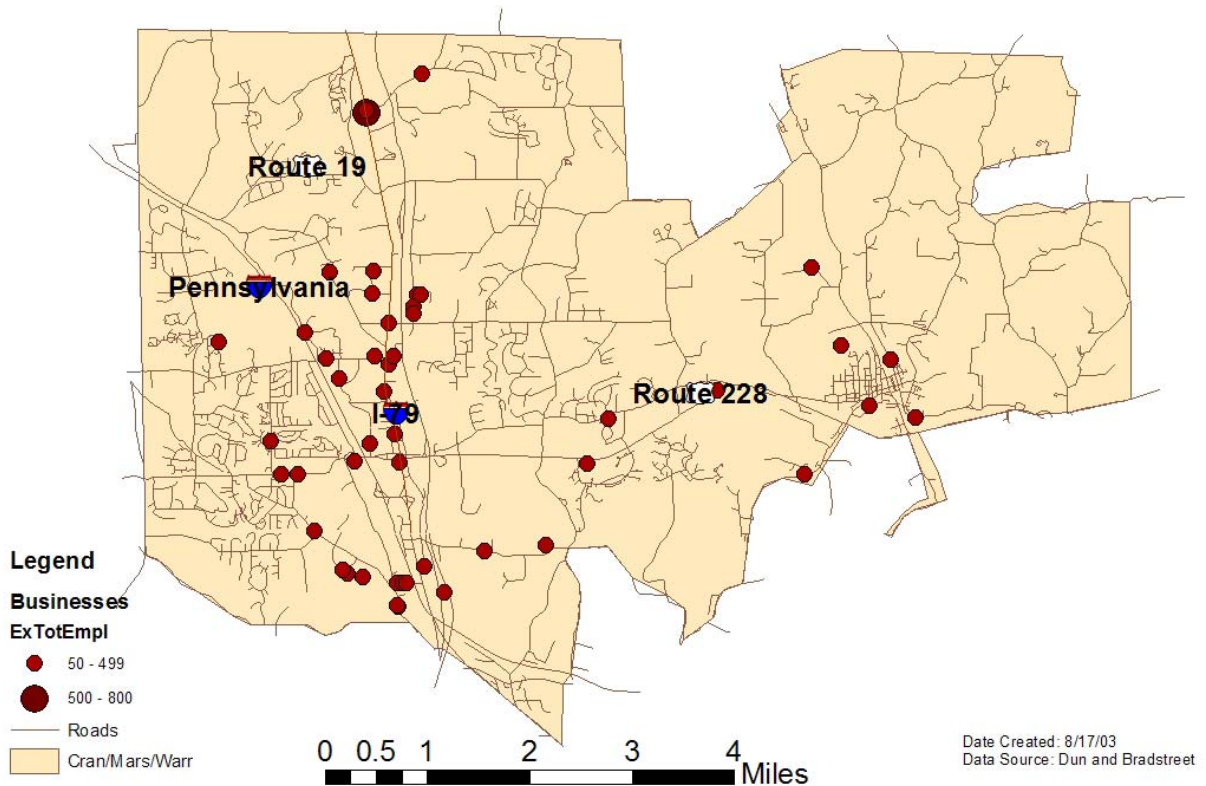
- For this study, Dun and Bradstreet data from the second quarter 2003 was obtained about employers in the Cranberry Area with 5 or more employees. The map below shows the location of these employers. According to Dun and Bradstreet data, there are 746 employers with 5 or more employees in the Cranberry Area. As the map below shows, a large number of these employers are concentrated along Route 19. Approximately 419 (56%) of these employers representing 10,922 jobs are located within half a mile of Route 19.

Businesses in the Cranberry/Mars/Warrendale Area, 2003



- According to Dun and Bradstreet data for the second quarter 2003, there are 88 large employers (with 50 or more employees) located in the Cranberry Area. These employers comprise 10,603 jobs. As the map of large employers below shows, most of these employers are located near one of the 4 major highways running through the area, Route 19, Route 228, I-79, and the PA Turnpike. A list of large employers is included in Appendix 1.

Large Businesses in the Cranberry/Mars/Warrendale Area, 2003



- CWIA also modeled the occupational makeup of the Cranberry Area's businesses to identify the types of jobs that exist in the area. These jobs are outlined below.

Table 2. Estimated Jobs by Major Occupational Cluster, Cranberry Area, 1998

Occupations	Total Jobs Cranberry Area	% of Total Jobs
Management, professional, and related occupations:	2,640	13.48
Management, business, and financial operations occupations:	1,198	6.12
Management occupations, except farmers and farm managers	913	4.66
Farmers and farm managers	106	0.54
Business and financial operations occupations:	179	0.92
Business operations specialists	77	0.39
Financial specialists	103	0.52
Professional and related occupations:	1,442	7.37
Computer and mathematical occupations	169	0.86
Architecture and engineering occupations:	236	1.20
Architects, surveyors, cartographers, and engineers	165	0.84
Drafters, engineering, and mapping technicians	71	0.36
Life, physical, and social science occupations	9	0.05
Community and social services occupations	131	0.67
Legal occupations	28	0.15
Education, training, and library occupations	382	1.95
Arts, design, entertainment, sports, and media occupations	73	0.37
Healthcare practitioners and technical occupations:	414	2.12
Health diagnosing and treating practitioners and technical occupations	248	1.27
Health technologists and technicians	166	0.85
Service occupations:	2,620	13.38
Healthcare support occupations	183	0.94
Protective service occupations:	167	0.85
Fire fighting, prevention, and law enforcement workers, including supervisors	24	0.12
Other protective service workers, including supervisors	144	0.73
Food preparation and serving related occupations	1,517	7.75
Building and grounds cleaning and maintenance occupations	380	1.94
Personal care and service occupations	372	1.90
Sales and office occupations:	4,590	23.44
Sales and related occupations	2,302	11.75
Office and administrative support occupations	2,288	11.69
Farming, fishing, and forestry occupations	137	0.70
Construction, extraction, and maintenance occupations:	1,119	5.71
Construction and extraction occupations:	645	3.29
Supervisors, construction and extraction workers	68	0.35
Construction trades workers	558	2.85
Extraction workers	19	0.10
Installation, maintenance, and repair occupations	474	2.42
Production, transportation, and material moving occupations:	3,042	15.54
Production occupations	1,716	8.76
Transportation and material moving occupations:	1,327	6.77
Supervisors, transportation and material moving workers	11	0.06
Motor vehicle operators	750	3.83
Rail, water and other transportation occupations	69	0.35
Material moving workers	496	2.53
Miscellaneous Occupations -- Not Assigned to Any Cluster	5,434	27.75
TOTAL JOBS	19,582	100.00

*Occupational Clusters Based on U.S. Census 2000

Prepared by Center for Workforce Information and Analysis, Pennsylvania Department of Labor and Industry, August 2003.

- The most prevalent occupations (excluding “miscellaneous” or uncategorized jobs) in the Cranberry Area are outlined in the table below.

Table 3. Prevalent Occupations, Educational Requirements and Wages, Cranberry Area, 1998

Occupation	% of Total Cranberry Jobs	% Requiring a Bachelor Degree	Average Annual Wage
Sales and Related	11.8%	3%	\$22,459
Office and administrative support	11.7%	0%	\$25,023
Production	8.8%	0%	\$28,588
Food preparation and serving related	7.7%	0%	\$16,599
Professional and related occupations	7.2%	56%	\$47,979
Management, business and financial operations occupations	6.1%	94%	\$73,514

- The number of jobs in the Cranberry Area is approximately the same as the number of working residents in the area. By comparing CWIA’s occupational profile of the Cranberry Area to the occupations reported by Cranberry residents in the 2000 Census, mismatches become apparent.

Table 4. Percent of Total Jobs by Occupational Category vs. Percent of Residents by Occupational Category, Cranberry Area 2000

	CWIA Projected Jobs	Actual Working Population
Management, professional, and related occupations:	18.7%	46.5%
Management, business, and financial operations occupations:	8.5%	21.8%
Management occupations, except farmers and farm managers	6.5%	16.0%
Farmers and farm managers	0.7%	0.2%
Business and financial operations occupations:	1.3%	5.6%
Business operations specialists	0.5%	2.9%
Financial specialists	0.7%	2.7%
Professional and related occupations:	10.2%	24.7%
Computer and mathematical occupations	1.2%	3.9%
Architecture and engineering occupations:	1.7%	3.8%
Architects, surveyors, cartographers, and engineers	1.2%	3.4%
Drafters, engineering, and mapping technicians	0.5%	0.4%
Life, physical, and social science occupations	0.1%	0.7%
Community and social services occupations	0.9%	0.8%
Legal occupations	0.2%	1.5%
Education, training, and library occupations	2.7%	5.0%
Arts, design, entertainment, sports, and media occupations	0.5%	1.8%
Healthcare practitioners and technical occupations:	2.9%	7.3%
Health diagnosing and treating practitioners and technical occupations	1.8%	6.4%
Health technologists and technicians	1.2%	1.0%
Service occupations:	18.5%	9.9%

Healthcare support occupations	1.3%	1.0%
Protective service occupations:	1.2%	1.0%
Fire fighting, prevention, and law enforcement workers, including supervisors	0.2%	0.7%
Other protective service workers, including supervisors	1.0%	0.4%
Food preparation and serving related occupations	10.7%	3.9%
Building and grounds cleaning and maintenance occupations	2.7%	1.9%
Personal care and service occupations	2.6%	2.0%
Sales and office occupations:	32.4%	29.7%
Sales and related occupations	16.3%	16.3%
Office and administrative support occupations	16.2%	13.4%
Farming, fishing, and forestry occupations	1.0%	0.1%
Construction, extraction, and maintenance occupations:	7.9%	6.0%
Construction and extraction occupations:	4.6%	3.0%
Supervisors, construction and extraction workers	0.5%	0.5%
Construction trades workers	3.9%	2.5%
Extraction workers	0.1%	0.0%
Installation, maintenance, and repair occupations	3.4%	3.0%
Production, transportation, and material moving occupations:	21.5%	7.8%
Production occupations	12.1%	3.4%
Transportation and material moving occupations:	9.4%	4.4%
Supervisors, transportation and material moving workers	0.1%	0.3%
Aircraft and traffic control occupations	0.0%	0.2%
Motor vehicle operators	5.3%	2.1%
Rail, water and other transportation occupations	0.5%	0.1%
Material moving workers	3.5%	1.6%

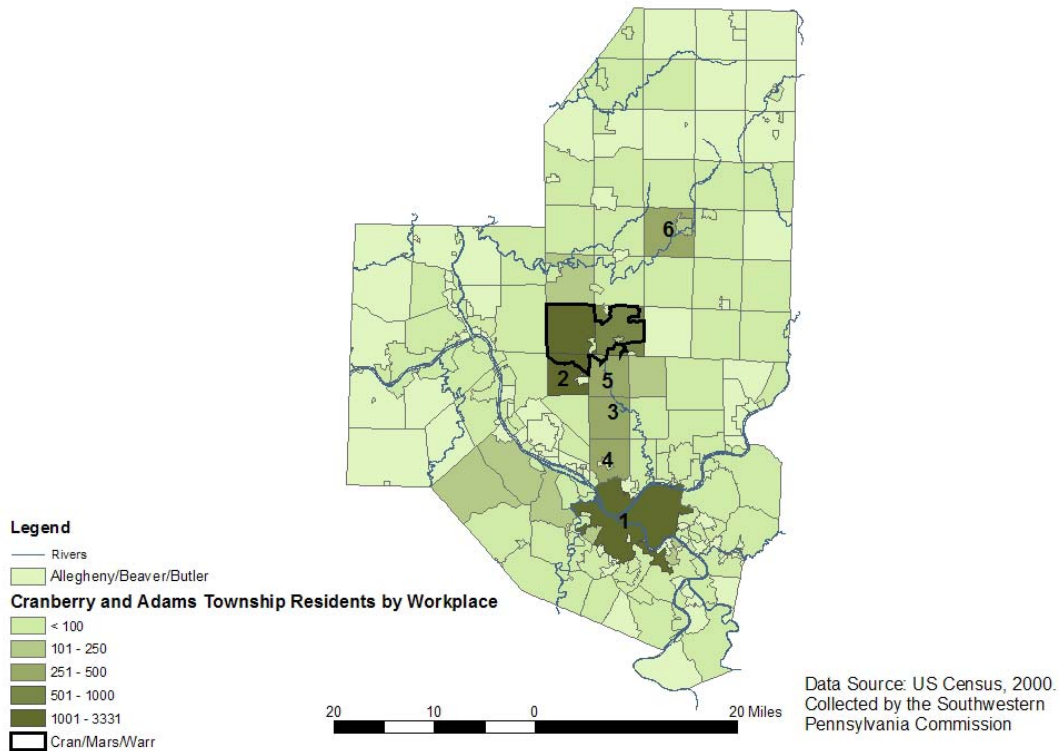
Source: Center for Workforce Information and Analysis Occupational Models and 2000 U.S. Census Data

- Based on state wage trends, approximately 60% of the jobs in the Cranberry area have average annual wages of less than \$30K while approximately 12% of the jobs have average annual wages of less than \$20K. Meanwhile, as the table above shows, nearly 50% of Cranberry’s working residents hold Management, Professional and Related occupations that have average annual wages of \$61,225. This mismatch suggests a reason why employers interviewed for this study cited difficulty attracting and retaining workers for specific positions that tend to pay lower wages.
- An analysis of educational requirements of Cranberry Area jobs also indicates a mismatch between Cranberry Area jobs and the educational attainment levels of Cranberry Area residents.
 - In the Cranberry Area, 10,138, or 46% of residents age 25 and older possess at least a bachelor degree (2000 Census). Yet, only 1,126 (approximately 8% of the jobs that are classified) require a bachelor degree. All other jobs require post-secondary vocational training, an associate degree or on-the-job-training.
 - 38 of the 50 census tracts with the highest concentrations of people with no more than a high school education are in Allegheny County. 23 of these are within the city of Pittsburgh. 44 of the 50 census tracts that have the highest concentrations of persons with less than a bachelor degree are located in Allegheny County. The municipalities containing census tracts with the highest concentrations of persons without bachelor degree are West Elizabeth, Lincoln, Glassport, Port Vue, McDonald, Trafford, Duquesne, Rankin, Mount Oliver, McKees Rocks, Millvale, Pittsburgh, Reserve, Midland, and Darlington.
- Maps showing median income, educational attainment and the occupations of workers by census tract for Allegheny, Beaver and Butler County are included in **Appendix 2**.

Commuting Trends and Current Public Transit Access to and from the Cranberry Area

It is not unusual that in southwestern Pennsylvania people travel across municipal boundaries for work. The Cranberry Area is no exception. Despite the fact that the Cranberry area has nearly the same number of jobs as working residents, approximately 75% of the Cranberry Area’s residents work outside of the area and approximately 75% of the area’s workers commute into the area from other municipalities. The map below shows the municipalities where Cranberry area residents work according to 2000 U.S. Census data.

Workplaces of Cranberry and Adams Township Residents by Municipality, 2000



- Excluding the Cranberry Area, the City of Pittsburgh, Marshall Township, McCandless, Ross Township, Pine Township, and Butler Township absorb the highest numbers of Cranberry Area residents who work outside of the area.

Table 5. Top Six Municipalities Where Cranberry Area Residents for Work

Municipality	# of Cranberry Area Residents
City of Pittsburgh (Allegheny County)	3,242
Marshall Township (Allegheny County)	1,059
McCandless Township (Allegheny County)	402
Ross Township (Allegheny County)	388
Pine Township (Allegheny County)	351
Butler Township (Butler County)	269

*Excludes Cranberry Area

As the map below shows, the Cranberry Area draws large numbers of workers from New Sewickly Township, Butler Township, City of Pittsburgh, Economy, Butler City, and Jackson Township. Lacking the ability to cross-tab this data with census data about the occupations that residents hold, we cannot say what kinds of workers are coming from where.

Municipalities of Residence of Workers in Cranberry and Adams Townships, 2000

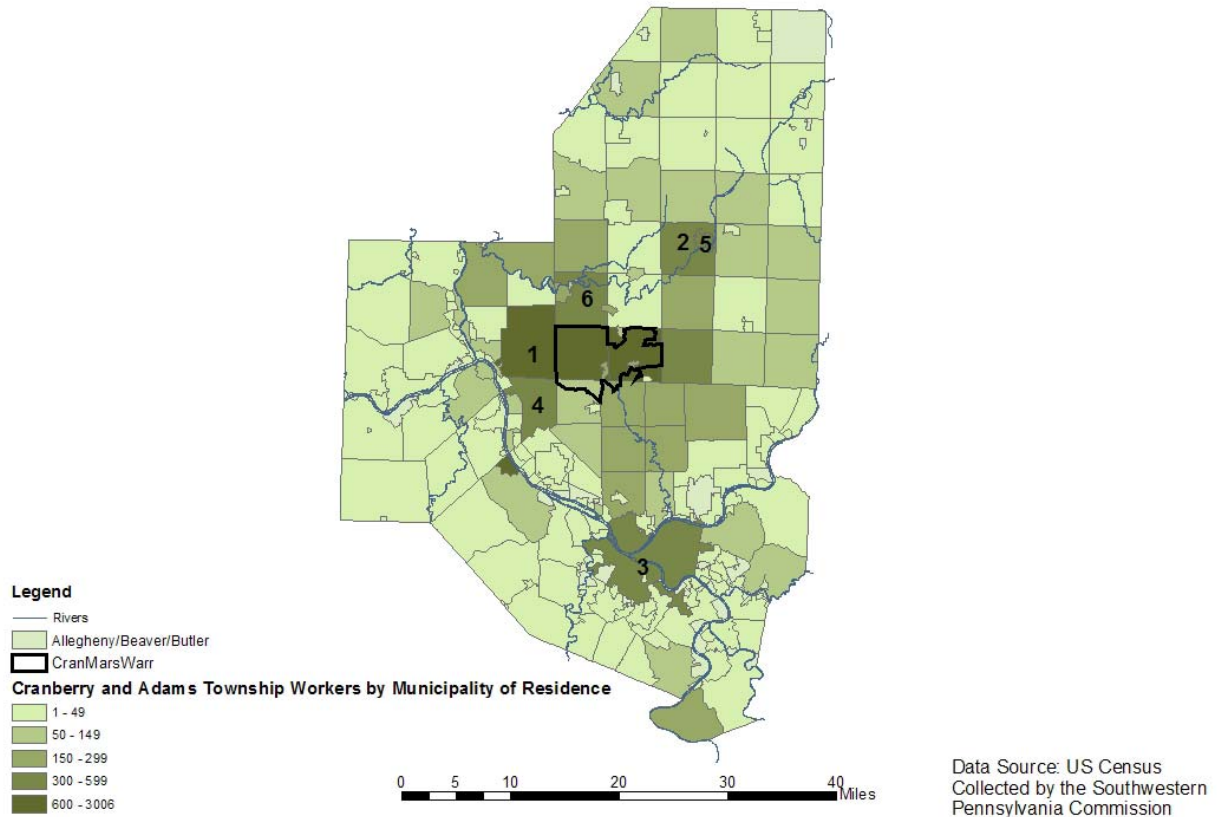


Table 6. Top Six Municipalities That Cranberry Area Workers Come From

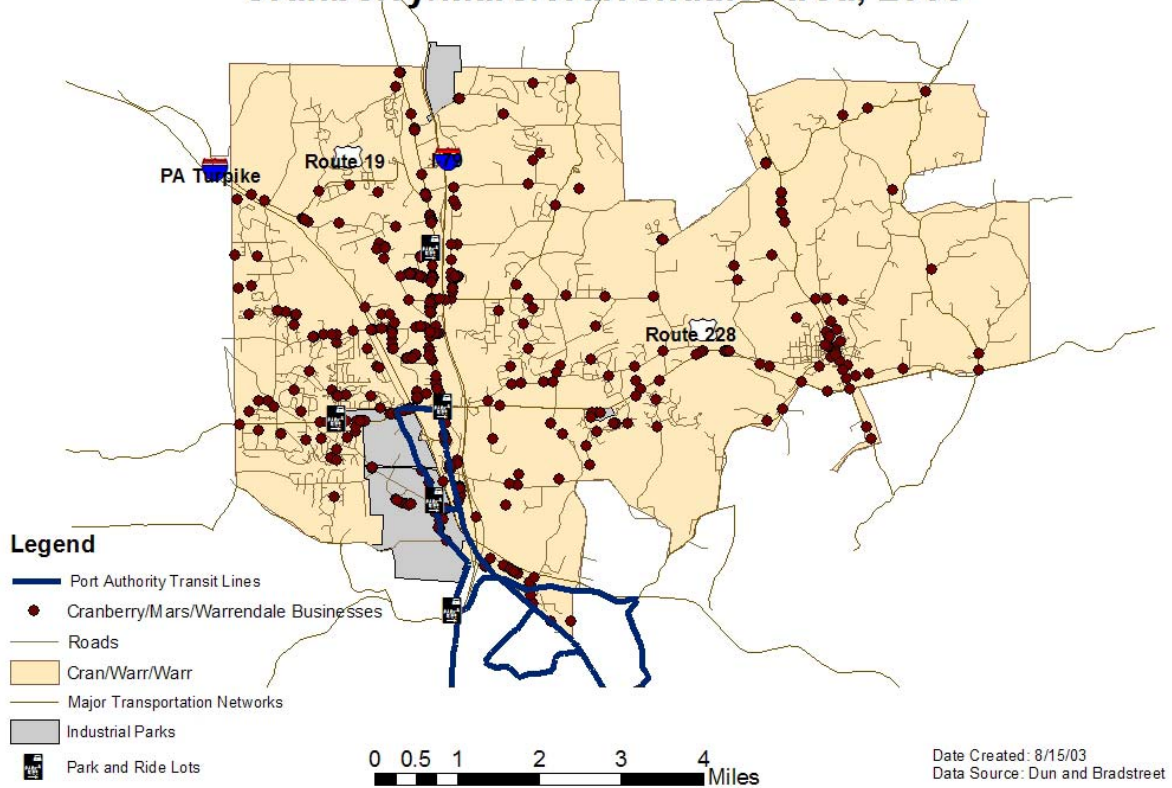
Municipality	# of Cranberry Area Residents
New Sewickly (Beaver County)	617
Butler Township (Butler County)	525
City of Pittsburgh (Allegheny County)	524
Economy (Beaver County)	455
Butler City (Butler County)	390
Jackson Township (Butler County)	340

*Excludes Cranberry Area

Transit Access to Jobs in Cranberry Area

Surveys of Cranberry Area employers and employees, and Allegheny County job seekers suggest that inadequate public transit is perceived as a barrier to accessing jobs and filling positions in the Cranberry area. The Three Rivers Workforce Investment Board obtained Dun and Bradstreet data to map the location of employers with 5 or more employees in the Cranberry study area in relation to the transit lines that serve the area. These transit lines have been in place since 2000 to provide access to Cranberry Area jobs for City of Pittsburgh residents. However, as is evident on the map below, these lines do not reach a large portion of the businesses in the Cranberry Area. In addition, the bus schedules do not accommodate non-traditional work hours. This is an important point as 69% of employers interviewed by the Three Rivers Workforce Investment Board for this study had positions for which employees were required to work “non-traditional” hours.

**Businesses, Transit Routes,
Park and Ride Lots, and Industrial Parks in the
Cranberry/Mars/Warrendale Area, 2003**

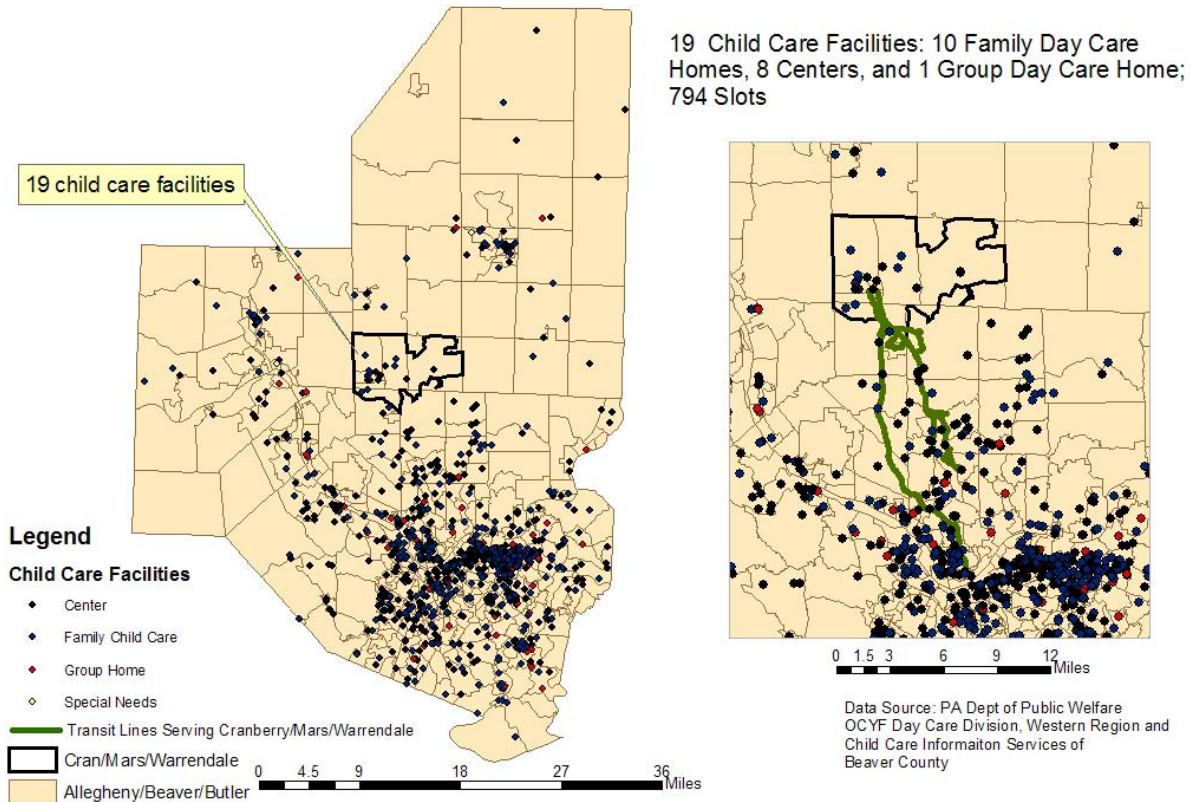


Childcare Availability in the Cranberry Area

For working parents, a lack of affordable, accessible, quality childcare can impede their ability to obtain and retain a job. For some workers, transit-dependency introduces an additional barrier to accessing childcare. From an employer’s perspective, employee difficulty in accessing childcare contributes to employee tardiness, absenteeism and turnover. Based on the critical role of childcare in making the match between workers and work places, part of our study entailed surveying Cranberry employers about their perceptions of the role that childcare plays in their ability to attract and retain qualified workers. We also inventoried and mapped childcare facilities in Allegheny, Beaver and Butler Counties using 2000 data obtained from the Pennsylvania Department of Public Welfare and Child Care Information Services of Beaver County to identify potential gaps in service.

The map below indicates the location of these facilities. It also shows the transit lines going into Cranberry in relation to these facilities. As the map shows, there are **19** childcare facilities recognized or licensed by Child Care Information Services in the Cranberry Area. These facilities can accommodate a total of approximately 750 children and reported about 100 openings in total in late October 2003. As is evident from the map, the majority of the childcare facilities located in the Cranberry area are not accessible by public transit.

ChildCare Facilities in Allegheny, Beaver and Butler Counties, 2000



The availability of childcare during non-traditional hours appears to be a key challenge affecting workers in the Cranberry area. In June 2003, the Early Care and Education Council (ECEC) of Butler County conducted a study of childcare availability in Butler County. A lack of non-traditional care (evening, weekend, and overnight) was among the 5 “areas of concern” that this study found related to childcare availability in Butler County. The study found that in Butler County there are a limited number of day care facilities that offer childcare for families who need evening, overnight, and weekend care and/or have children with special needs. In the Cranberry area, a lack of facilities to accommodate non-traditional workers poses a challenge for employers and workers. A high percentage (69%) of employers in the Cranberry area surveyed by the Three Rivers Workforce Investment Board report jobs with non-traditional work hours. The childcare facilities in the Cranberry area tend to operate between the hours of 6AM and 6:30PM and thus, do not accommodate these workers.

The Early Care and Education Council’s (ECEC) study also cited employee-sponsored childcare as an area of concern. The study emphasizes that employers can save money by investing in work/family programs. The study cites the example of Johnson and Johnson which has reported a savings of \$4 for every \$1 that the company invests in work/family programs and quotes Peter Carpino, Chair Emeritus of the United Way of Pennsylvania, in saying “I have never seen such compelling data on a public policy issue. Economic return on investment in Early Childhood Education ranges from \$4 to \$7 for every \$1 invested.” ECEC’s study suggests that there is a lack of understanding among Butler County employers about the advantages of providing childcare benefits and the group has adopted employer education about the importance of “family benefits” as a priority in its 5-year strategic plan aimed at increasing the quality of childcare and early education in Butler County. Interviews of Cranberry Area employers conducted by the Three Rivers Workforce Investment Board support this notion that employers could benefit from more information about the advantages of supporting their employee’s childcare needs. A low percentage (13%) of Cranberry Area employers interviewed by the Three Rivers Workforce Investment Board provide some kind of childcare benefit to their employees.

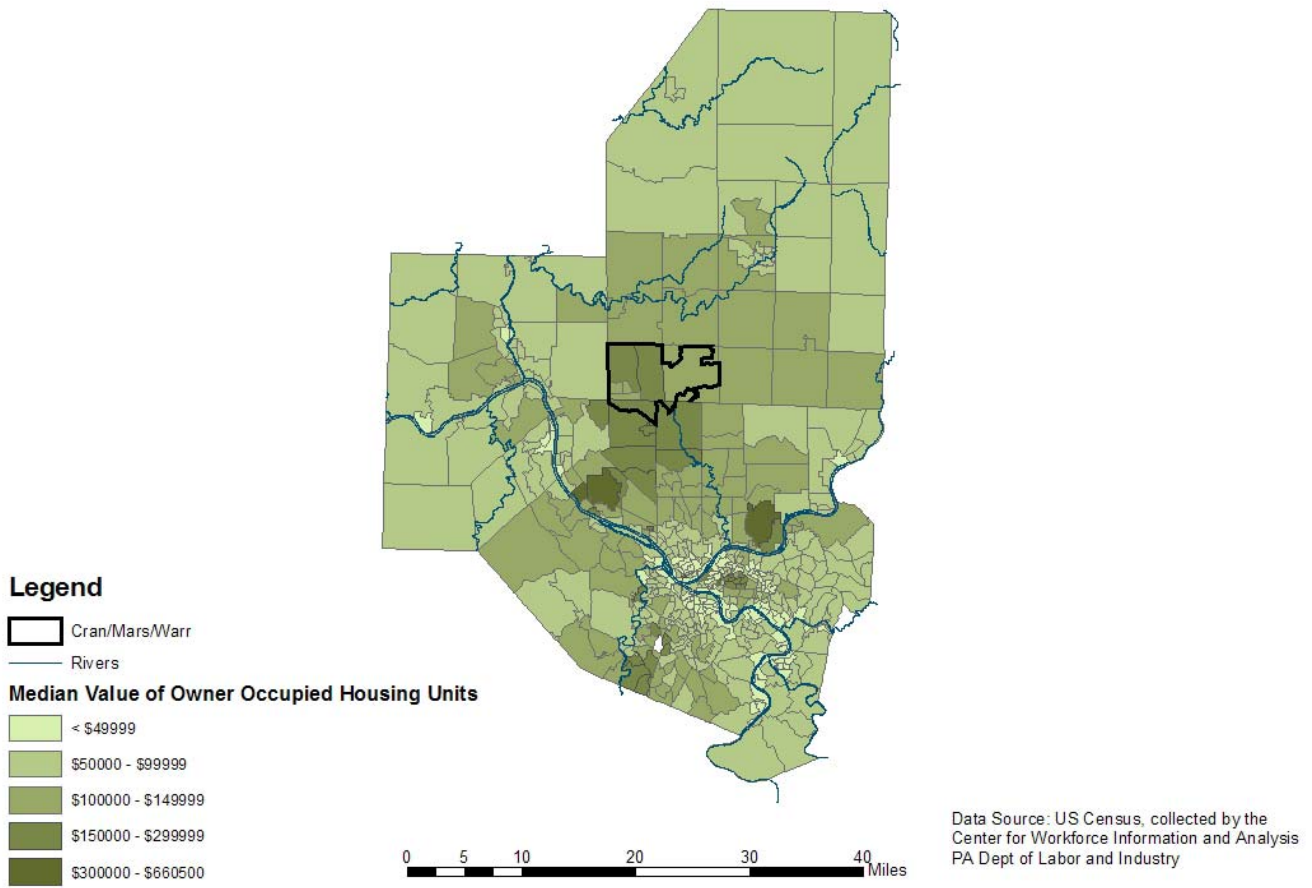
A third concern that ECEC identified was transportation between childcare and school settings. By and large, school buses do not cross district lines to transport children from school to day care and for many children in kindergarten buses only travel one way. The responsibility of parents to transport their children from school to day care adds another layer childcare-related complexity for employees. This situation is particularly challenging for transit-dependent employees.

ECEC is doing extensive advocacy in Butler County around childcare issues and provides an opportunity for partnership in employer outreach and transportation planning.

Housing Affordability in the Cranberry Area

The Cranberry Area has experienced rapid and significant residential development over the past decade. A lack of affordable housing may be one of the reasons that the Cranberry area draws 75% of its workers from outside. As the map below shows, the Cranberry area is one of the least affordable areas in the three-county region in terms of owner-occupied housing.

**Median Value of Owner Occupied Housing Units:
Allegheny, Beaver and Butler Counties, 2000**



The median value of an owner occupied home in the Cranberry area is about \$154,960, 81% higher than the median value for Allegheny, Beaver and Butler counties combined. As the map shows, Allegheny County bears a much larger share of the region’s most affordable owner-occupied housing than Beaver and Butler Counties. A much smaller share of the Cranberry Area’s occupied units are renter occupied as compared to Allegheny, Beaver and Butler Counties (14% compared to 31% for the three counties). According to 2000 U.S. Census data, the median rent in the Cranberry Area is 34% higher than the three counties (\$590/month in Cranberry versus \$438 for the three counties combined).