

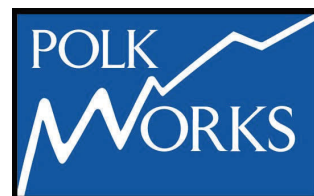
POLK WORKS presents the
State of the Workforce Survey

Polk County, Florida - 2008

Our Mission:

To be the Innovative Leader to ensure and sustain
a quality workforce for today and the future.

www.polkworks.org





As the innovative leader in workforce development, POLK WORKS is elated to share the results of its first survey, State of the Workforce Polk County 2008.

The results of the survey will assist Polk Works in preparing our citizens for careers that meet local businesses' demands for today and in the future.

We are grateful for the cooperation of the local business community in gathering our results. With a 33% return rate from our participants, we are certain that this initiative was worthwhile for our Board, our citizens and our local businesses.

Participating employers identified Polk County as a growth market over the next several years. One in three employers across the county expects to expand their workforce over the next twelve months. Employers are most challenged by the severe shortage of available skilled workers. Training initiatives are viewed as key as employers work internally to grow their own talent.

Whether you are an employer needing a skilled worker or customized training for your staff, Polk Works stands ready to assist your business. Surveys such as this one help to ensure that we operate as a demand driven workforce system.

As our community continues to grow, Polk Works is committed to meeting the workforce needs of our local businesses. Polk Works is dedicated to building partnerships that advance our efforts in developing a workforce that mirrors the demand of our businesses.

We certainly hope that our findings will be useful to you in your future planning efforts to recruit, train and retain your workforce.

Sincerely,

A handwritten signature in black ink, appearing to read "Rebecca Rodgers".

Rebecca Rodgers
Board Chairperson

A handwritten signature in black ink, appearing to read "Stacy Campbell-Domineck".

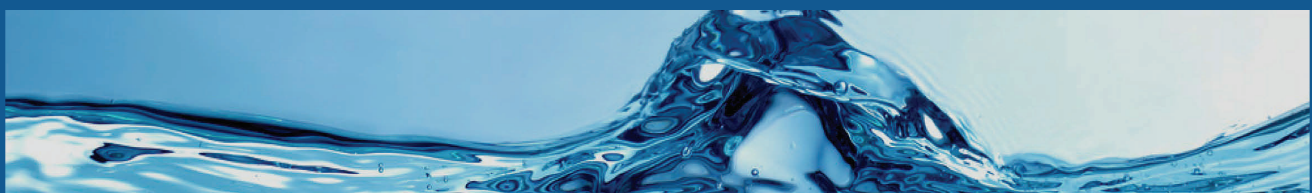
Stacy Campbell-Domineck
President & CEO

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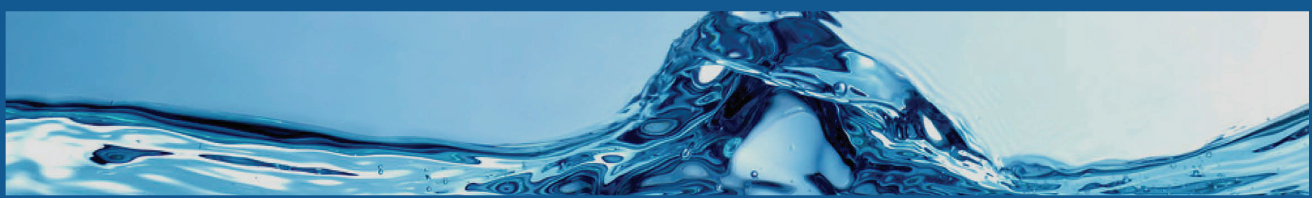
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STATE OF THE WORKFORCE

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◇ EXECUTIVE SUMMARY

In early 2008, Polk Works conducted its first study of the workforce as it pertains to business and industry in the county. The report, *State of the Workforce - Polk County 2008*, focused on capturing information that addresses critical workforce issues related to employer challenges, industry-specific growth possibilities and methods for dealing with these challenges.

The *State of the Workforce - Polk County 2008* sets the benchmark by which future survey results can be measured. This year's report is the result of collaboration between Polk Works, its partners, and nearly 200 businesses in the Polk County area that participated in the study. Respondents included a diverse population of business types and sizes throughout the 17 municipalities. The key issues in this year's study are:

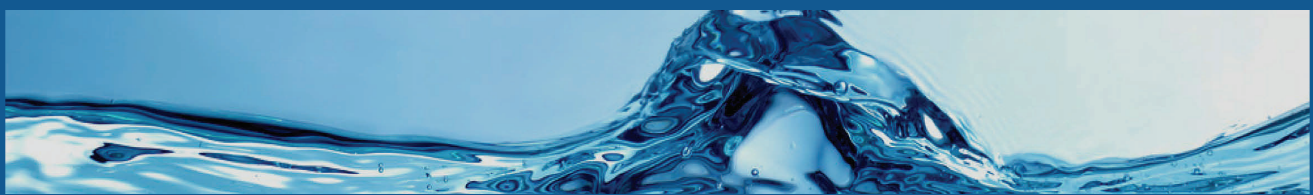
- ◆ What are the major challenges facing employers?
- ◆ How are employers recruiting workers?
- ◆ What are the critical skill needs of employers?
- ◆ How are employers meeting critical needs?

Over the past few years, Polk County has experienced unprecedented growth. This report seeks to close the informational gap by providing comprehensive data on workforce challenges and opportunities. The report is designed to facilitate discussion on workforce issues and provide information from an employer perspective on major facets of workforce management that companies deal with on a daily basis.

This customized survey was conducted to obtain local employers' opinions on issues that directly impact them. The respondents included employers from various business types and sizes. In fact, the smallest respondent employed, 30% of them had 25 or less employees, while only 8% of respondents had 1,000 employees or more. Nineteen percent of respondents indicated their primary line of business was in the manufacturing industry.

What are the major challenges facing employers?

- ◆ Three of the top five critical issues involve education or training opportunities for local residents and employees
- ◆ The lack of a skilled workforce is the greatest issue to Polk County industries. Nearly forty-two percent of the employers indicated this to be a large or major challenge.
- ◆ Recruiting workers for potential relocation, or that could commute to Polk County, was identified as an important workforce issue for respondents.
- ◆ Improving the rate of high school graduates was also an important topic identified in the survey.



◇ EXECUTIVE SUMMARY (CONTINUED)

How are employers recruiting workers?

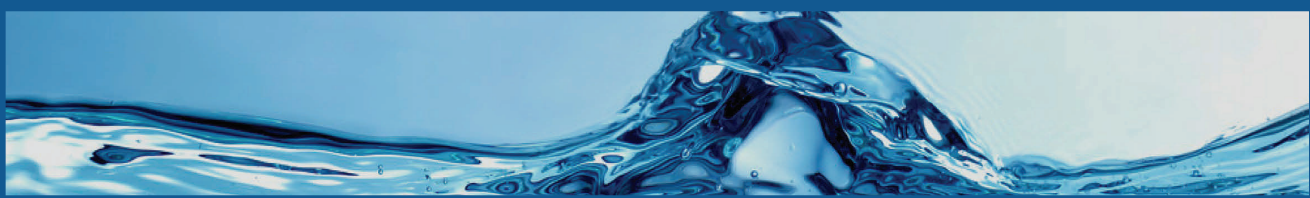
- ◆ Polk County employers rely on employee referrals as the most frequent method for identifying new personnel.
- ◆ Local newspapers and one-stop career centers were identified as additional sources that employers frequently turn to when looking for qualified new hires.
- ◆ Employers with company websites were also likely to rely on national job websites as a top source for recruiting potential hires.

What are the critical skill needs of employers?

- ◆ Local employers indicated that among the most important skill areas needed from their employees were customer service, communication, work ethic/work readiness (productivity, absenteeism) and basic skills (reading, writing, math, knowledge of English language).
- ◆ Ninety-three percent of employees indicated a medium to major challenge in finding qualified employees.
- ◆ Forty-five percent of employers plan to expand within the next three years.

How are employers meeting critical needs?

- ◆ Eighty-one percent of employers provide some type of training for their employees.
- ◆ The majority of training opportunities provided as internal skilled-based training specific to each job or area of responsibility.
- ◆ Approximately 63% of employers offer their employees tuition reimbursement or flex time to pursue external training opportunities.
- ◆ Fifty-one percent of respondents indicated their employees could utilize specialized training to upgrade their skills.



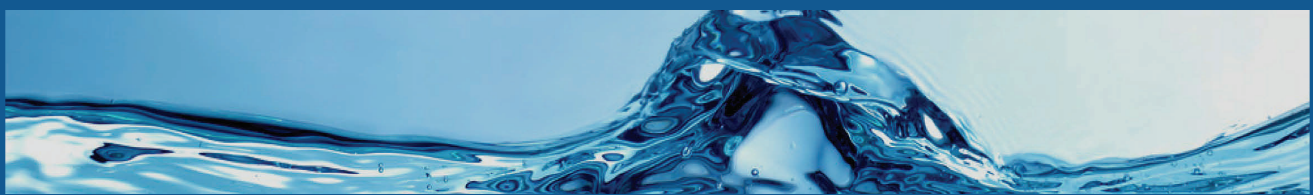
◇ INTRODUCTION

Polk Works represents a unique county in Florida. The area has experienced rapid growth while the majority of the population inhabits small rural communities. Over the last decade, Polk County has changed from a mining and agricultural center to an economy focused on housing, educational, health and professional services.

As local employers, business leaders, organizations, educational institutions and training professionals try to keep up with the ever-changing world of work and the accompanying labor demands of Polk County, it is imperative that a periodic assessment of the issues, needs and conditions be undertaken. Nobody is in a better position to provide this input than the local business community and employers of Polk County.

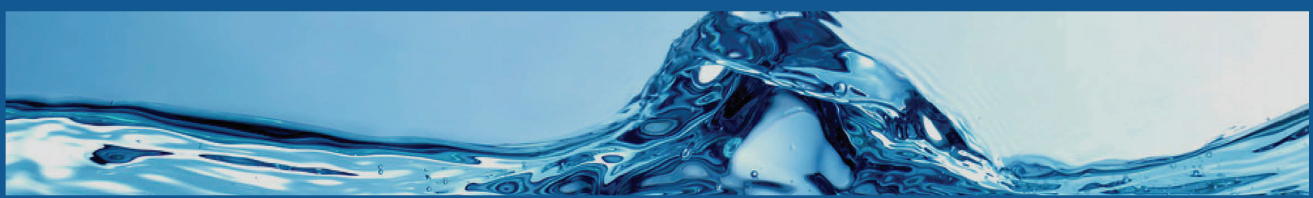
The resulting snapshot of some of the critical factors for continued workforce development appear on the following pages. Welcome to the

◇ STATE OF THE WORKFORCE ~ POLK COUNTY 2008



◇ POLK COUNTY FACTS & FIGURES

- ◆ The 2008 population for the county is estimated at 579,879, a growth of 20% since 2000. The county's population is projected at 640,695 by 2013, representing a 5-year growth rate of 11%.
- ◆ The 2008 median household income is estimated at \$43,111.
- ◆ Polk County encompasses 2,010 square miles. It is the fourth largest county in Florida in terms of land mass.
- ◆ With more than 554 lakes and four major river headwaters, Polk County offers numerous recreational and outdoor opportunities.
- ◆ There are 17 municipalities in Polk County; population in the unincorporated areas is estimated at 362,801.
- ◆ In 2007, it was one of 10 communities in the U.S. awarded the All-America City designation which recognizes "exemplary community vision, collaborative problem-solving and inclusiveness to meet local challenges."

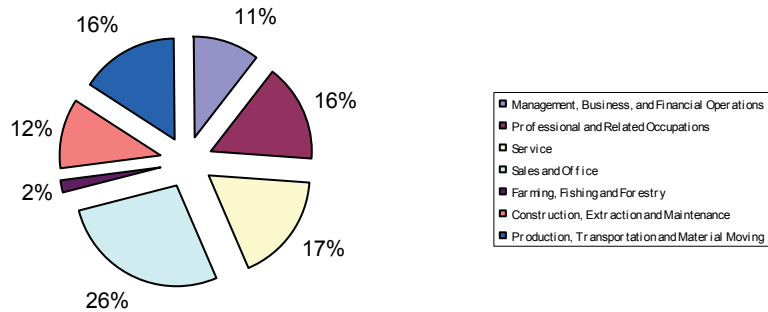


COUNTY OVERVIEW

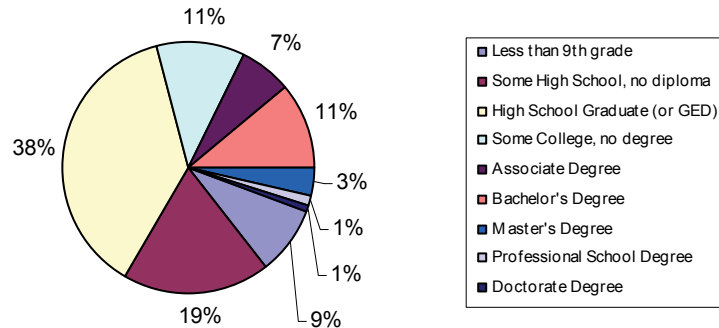
◇ POLK COUNTY FACTS & FIGURES

- ◆ Approximately 250,529 individuals ages 16 or more are employed. Of this number, 27% are blue collar workers and 54% are employed in white collar jobs, while 19% are in service and farm industries.
- ◆ Approximately 293,132 of the county residents have earned a high school diploma or better.
- ◆ More than 90,400 full-time students were enrolled in public schools in Polk County in 2007.
- ◆ High School graduates ages 25 or more comprise 75% of Polk County's population, compared to nearly 80% for the State of Florida.
- ◆ Approximately 15% of the county's population has a bachelor's degree or higher, compared to 22.3% for the State of Florida.

Civilian Employment by Occupation 16+



Educational Attainment 25+

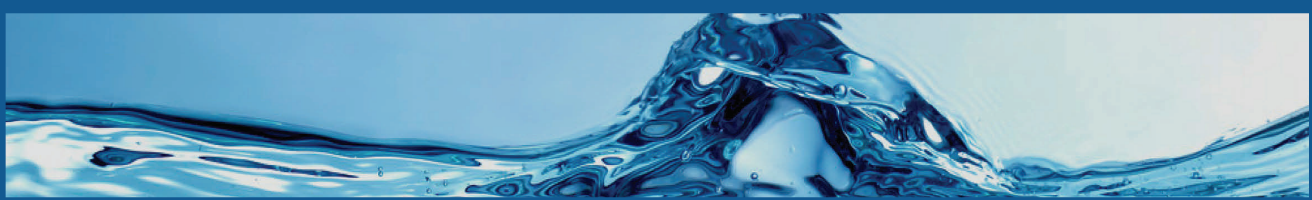


COUNTY OVERVIEW

◇ POLK COUNTY FACTS & FIGURES

- ◆ The retail trade sector experienced the most growth during the first half of 2007.
- ◆ The health care and social assistance sector is also exhibiting strong growth, adding over 5,000 jobs in 2007.
- ◆ Two industry sectors are expected to grow significantly in Polk County. The professional and business services (management of companies, professional & scientific) and the medical industry (home health aides, physician assistants, dental assistants, physical therapists). These industry sectors are expected to grow nearly 3.7% and 2.6% respectively by 2015.
- ◆ Manufacturing and construction jobs experienced the lowest growth among industrial sectors.
- ◆ Polk County experienced wage growth of less than 2.0 percent during 2007.
- ◆ 38,277 individuals sought employment through Polk Works in fiscal year 2007/2008.
- ◆ 724 openings were filled by Polk Works in the first six months of 2008.
- ◆ 1,074 employers were served by Polk Works in the first six months of 2008.

Jobs By Industry	Employment		Annual Change	
	2007	2015	Total	Percent
Total All Industries	224,218	255,407	3899	1.7%
Agriculture, Forestry	5,668	5,300	-46	-0.8%
Construction	14,763	13,880	-110	-0.7%
Manufacturing	17,683	17,339	-43	-0.2%
Wholesale Trade	10,706	11,971	158	1.5%
Retail Trade	26,971	30,732	470	1.7%
Transportation, Warehousing	11,841	13,302	183	1.5%
Information	2,209	2,288	10	0.4%
Financial Activities	11,450	12,976	191	1.7%
Business Services	41,389	53,811	1553	3.8%
Education & Health Services	27,004	32,657	707	2.6%
Leisure & Hospitality	17,289	19,810	315	1.8%
Other Services	8,749	9,970	153	1.7%
Total Government	28,496	31,371	359	1.3%

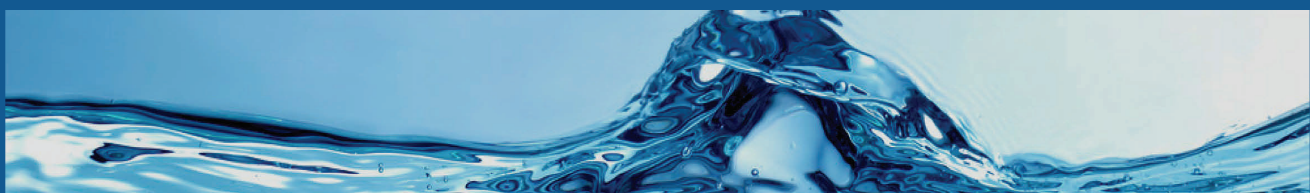


COUNTY OVERVIEW

◇ COUNTY EMPLOYMENT FIGURES

- ◆ Polk County's fastest-growing industries are projected to add 125,606 jobs by 2015, a 24% increase over 2007 figures.
- ◆ The fastest-growing positions projected to grow, in terms of percentage, are securities, commodities and other investments, followed by administrative and support services.
- ◆ For the first six months of 2008, the five largest industry sectors are:
 - Professional and Business Services 35,000 employees
 - Education and Health Services 28,300 employees
 - Retail Trade 26,500 employees
 - Local Government 23,400 employees
 - Leisure and Hospitality 17,900 employees

FASTEST GROWING INDUSTRIES (Min 260 jobs in 2007)					
Rank	Title	Employment		Annual Change	
		2007	2015	Total	Percent
1	Securities, Commodity Contracts, and Other Investments	426	615	24	5.55
2	Administrative and Support Services	28,672	38,618	1,243	4.34
3	General Merchandise Stores	7,062	9,295	279	3.95
4	Furniture and Home Furnishings Stores	1,206	1,563	45	3.70
5	Ambulatory Health Care Services	8,872	11,115	280	3.16
6	Educational Services	3,511	4,340	104	2.95
7	Amusement, Gambling, and Recreation Industries	2,483	3,068	73	2.95
8	Professional, Scientific, and Technical Services	6,689	8,191	188	2.81
9	Plastics and Rubber Products Manufacturing	1,039	1,246	26	2.49
10	Building Material and Garden Supply Stores	3,524	4,205	85	2.42
11	Rental and Leasing Services	854	1,018	20	2.40
12	Hospitals	8,100	9,595	187	2.31
13	Health and Personal Care Stores	1,580	1,864	36	2.25
14	Nursing and Residential Care Facilities	4,274	4,987	89	2.09
15	Social Assistance	2,247	2,620	47	2.07
16	Motor Vehicle and Parts Dealers	4,058	4,720	83	2.04
17	Warehousing and Storage	4,837	5,625	98	2.04
18	Management of Companies and Enterprises	5,452	6,340	111	2.04
19	Membership Associations and Organizations	5,115	5,919	100	1.96
20	Waste Management and Remediation Service	576	662	11	1.87

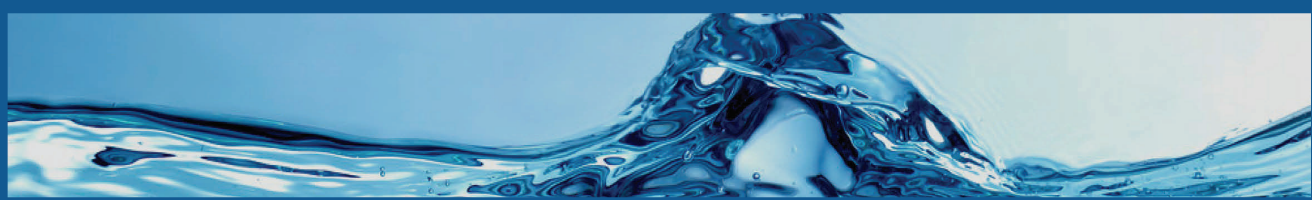


COUNTY OVERVIEW

◇ COUNTY EMPLOYMENT FIGURES

TOP 25 OCCUPATIONS PROJECTED TO GROW IN POLK COUNTY

R a n k	Title	Employment		Annual	Average Annual		2007	Hourly*
		2007	2015	%	Openings		Avg.	
				Change	Due to	Due to	Hourly	
					Growth	Separations	Tot	Wage \$
1	Retail Salespersons	8,950	11,100	3.00	269	306	575	12.66
2	Janitors and Cleaners, Except Maids and Housekeeping	5,112	6,633	3.72	190	90	280	9.64
3	Registered Nurses	4,891	6,301	3.60	176	95	271	26.99
4	Truck Drivers, Heavy and Tractor-Trailer	7,131	8,059	1.63	116	113	229	16.47
5	Nursing Aides, Orderlies, and Attendants	3,488	4,368	3.15	110	43	153	10.45
6	Food Preparation & Serving Workers, Including Fast Food	5,214	6,083	2.08	109	217	325	7.79
7	Customer Service Representatives	3,652	4,502	2.91	106	51	157	12.35
8	Laborers and Freight, Stock, and Material Movers, Hand	5,889	6,705	1.73	102	186	288	10.09
9	Landscaping and Groundskeeping Workers	3,158	3,929	3.05	96	65	161	10.47
10	Licensed Practical and Licensed Vocational Nurses	3,095	3,838	3.00	93	63	156	16.37
11	Waiters and Waitresses	3,628	4,216	2.03	74	179	253	7.85
12	Office Clerks, General	5,100	5,676	1.41	72	110	182	11.43
13	Bill and Account Collectors	1,330	1,820	4.61	61	23	84	11.38
14	Maids and Housekeeping Cleaners	1,841	2,245	2.74	50	37	87	8.37
15	Maintenance and Repair Workers, General	3,133	3,535	1.60	50	58	109	16.12
16	Amusement and Recreation Attendants	1,241	1,641	4.03	50	33	83	7.66
17	Carpenters	2,941	3,341	1.70	50	46	96	14.91
18	Truck Drivers, Light or Delivery Services	2,288	2,674	2.11	48	20	68	13.20
19	Sales Representatives, Wholesale and Manufacturing, Other	3,470	3,855	1.39	48	89	137	31.11
20	General and Operations Managers	1,930	2,292	2.34	45	35	80	49.63
21	Elementary School Teachers, Except Special Education	1,975	2,327	2.23	44	42	86	31.61
22	Network Systems and Data Communications Analysts	886	1,231	4.87	43	9	53	NA
23	Receptionists and Information Clerks	1,844	2,187	2.33	43	43	86	10.98
24	Accountants and Auditors	1,985	2,295	1.95	39	36	75	28.70
25	Cooks, Restaurant	1,528	1,833	2.50	38	45	83	9.81

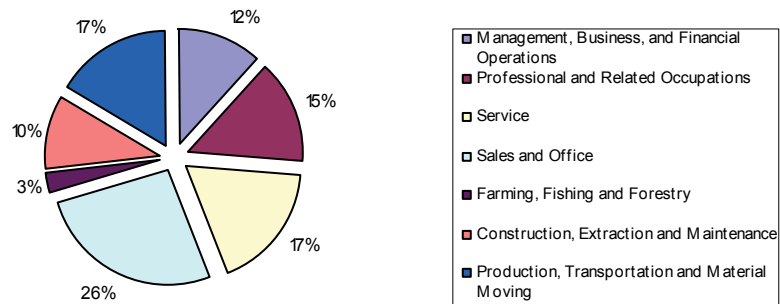


MUNICIPALITY PROFILES

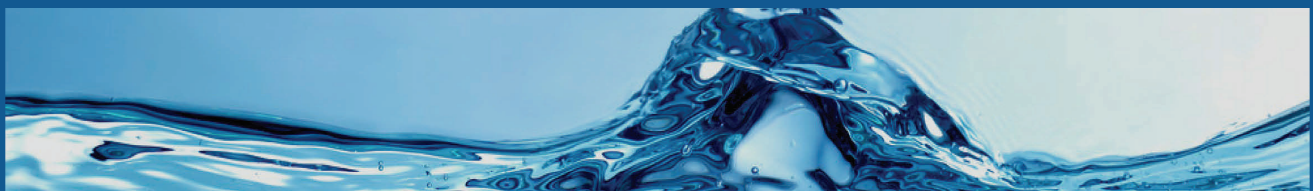
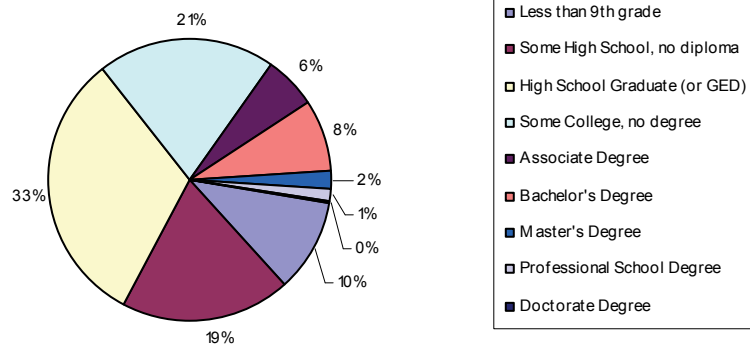
Auburndale

- ◆ The 2008 population is estimated at 12,306, a growth of 17% since 2000. The city's population is projected at nearly 13,000 by 2013, representing a 5-year growth rate of 5%.
- ◆ The 2008 median household income is estimated at \$39,170.
- ◆ Local industries include concentrate juice plants, fresh fruit packing houses, container manufacturers, mobile home manufacturing, paper box and plastic pipe companies, distilleries, farm machinery and trucking companies.
- ◆ Approximately 5,586 individuals ages 16 or more are employed. Of this number, 27% are blue collar workers and 27% are employed in white collar jobs, while 19% are in service and farm industries.
- ◆ Approximately 5,577 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

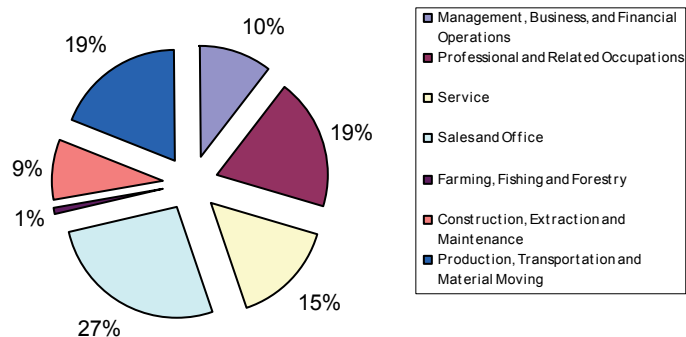


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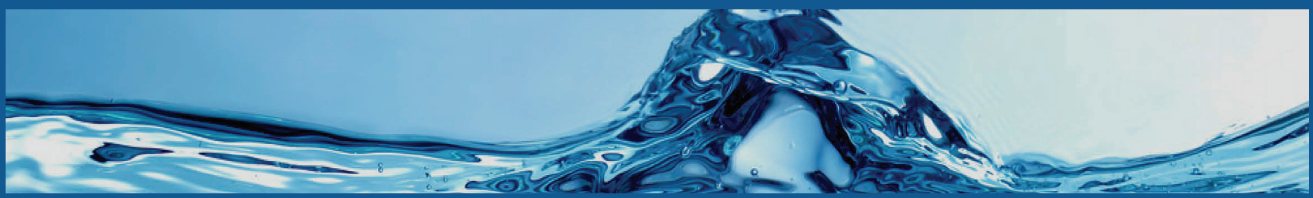
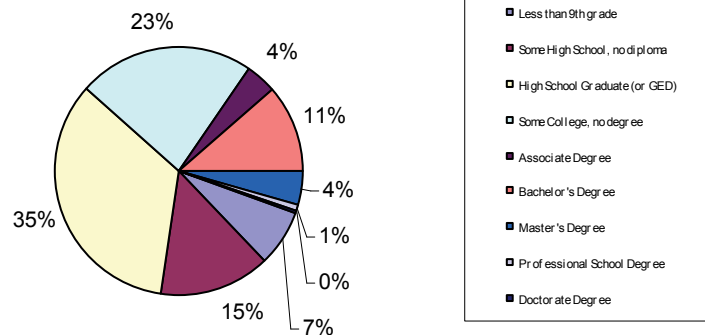
BARTOW

- ◆ The 2008 population is estimated at 16,364, a growth of nearly 7% since 2000. The city's population is projected at 17,124 by 2013, representing a 5-year growth rate of 4%.
- ◆ The 2008 median household income is estimated at \$45,702.
- ◆ The capital of Polk County is the county's second largest city in terms of geographical area. State and County governments are a large employer and the Phosphate mining industry west of Bartow is the largest in the U.S.
- ◆ Approximately 6,497 individuals ages 16 or more are employed. Of this number, 28% are blue collar workers and 55% are employed in white collar jobs, while 16% are in service and farm industries.
- ◆ Approximately 8,473 of the city's residents have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

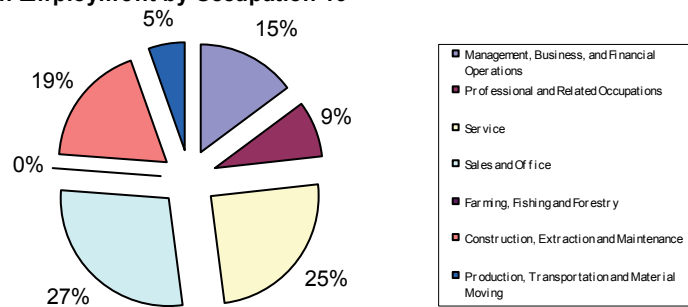


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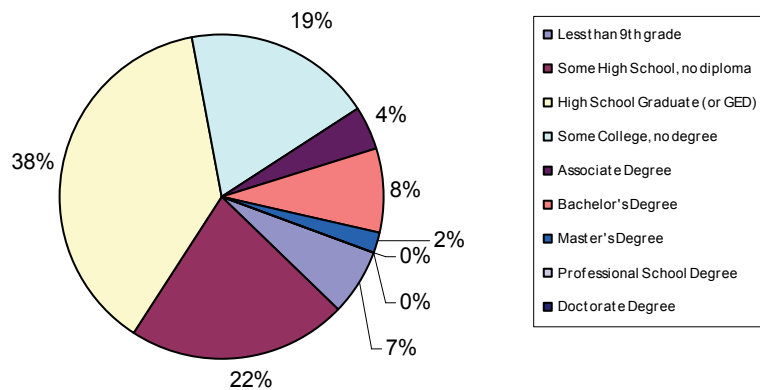
DAVENPORT

- ◆ The 2008 population is estimated at 2,115, a growth of 9% since 2000. The city's population is projected at nearly 2,344 by 2013, representing a 5-year growth rate of 10%.
- ◆ The 2008 median household income is estimated at \$35,729.
- ◆ Davenport is rapidly developing due to its proximity to major tourist attractions. This influx of money greatly influences local economy and development.
- ◆ Approximately 809 individuals ages 16 or more are employed. Of this number, 24% are blue collar workers and 50% are employed in white collar jobs, while 26% are in service and farm industries.
- ◆ Approximately 1,130 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

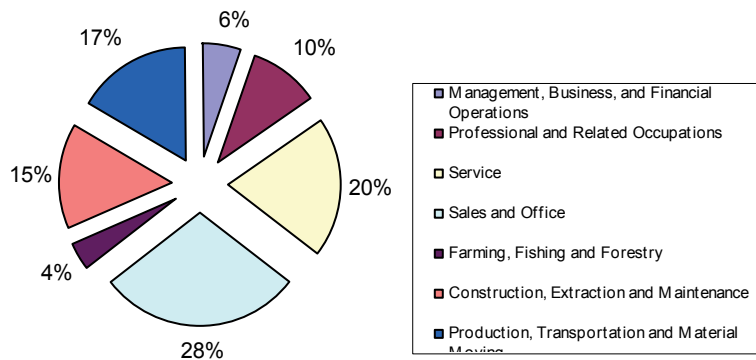


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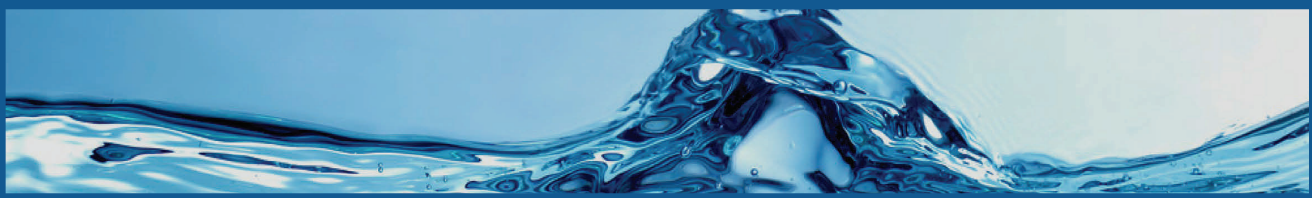
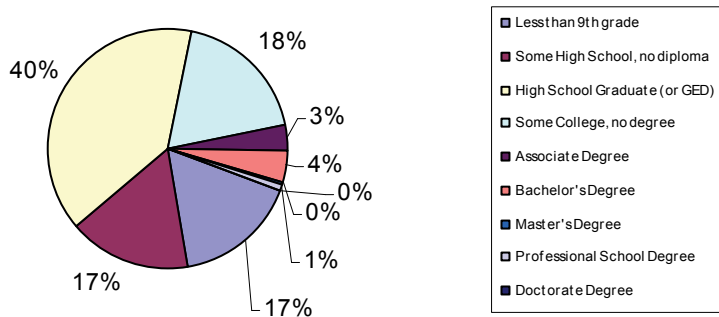
DUNDEE

- ◆ The 2008 population is estimated at 3,602, a growth of nearly 24% since 2000. The city's population is projected at 4,014 by 2013, representing a 5-year growth rate of 11%.
- ◆ The 2008 median household income is estimated at \$33,853.
- ◆ Dundee was built on the wealth of Florida's citrus industry but now serves as a growing bedroom community to larger neighboring cities.
- ◆ Approximately 1,407 individuals ages 16 or more are employed. Of this number, 32% are blue collar workers and 43% are employed in white collar jobs, while 25% are in service and farm industries.
- ◆ Approximately 1,574 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

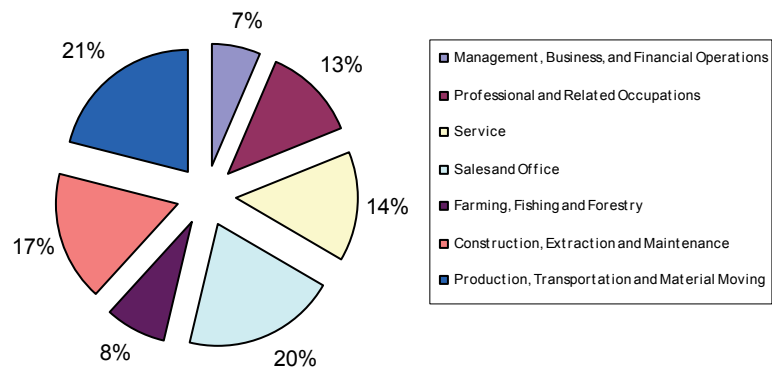


MUNICIPALITY PROFILES

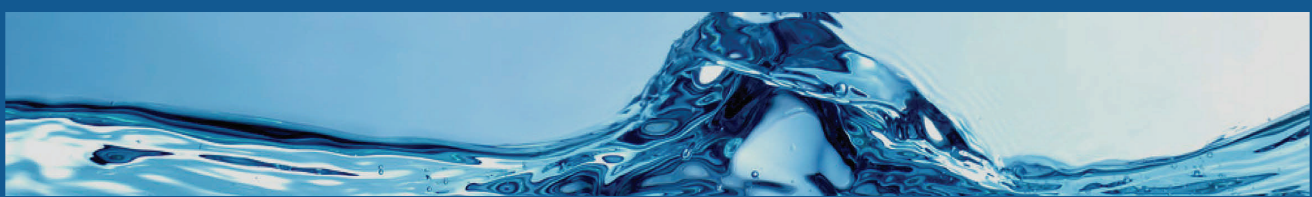
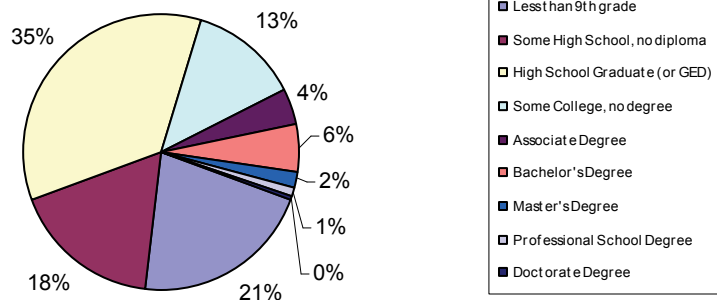
EAGLE LAKE

- ◆ The 2008 population is estimated at 2,689, a growth of 7% since 2000. The city's population is projected at nearly 2,834 by 2013, representing a 5-year growth rate of nearly 6%.
- ◆ The 2008 median household income is estimated at \$37,104.
- ◆ The city was named by a British traveler who settled in the area in the early 1880's.
- ◆ Approximately 1,167 individuals ages 16 or more are employed. Of this number, 38% are blue collar workers and 39% are employed in white collar jobs, while 23% are in service and farm industries.
- ◆ Approximately 1,036 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



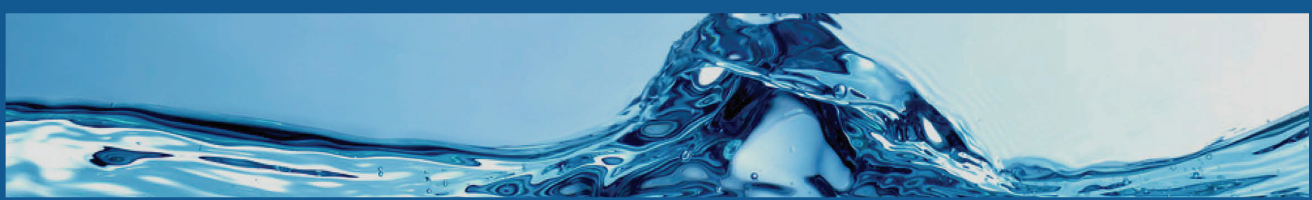
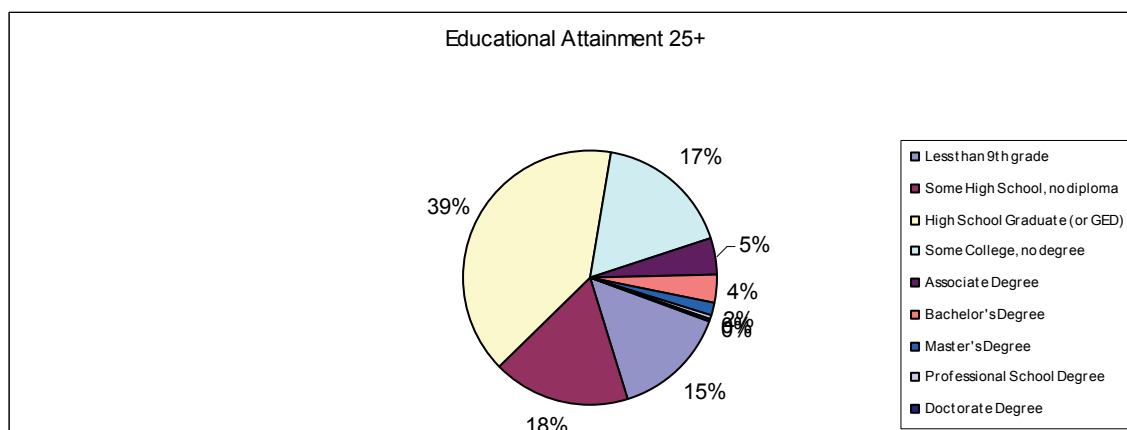
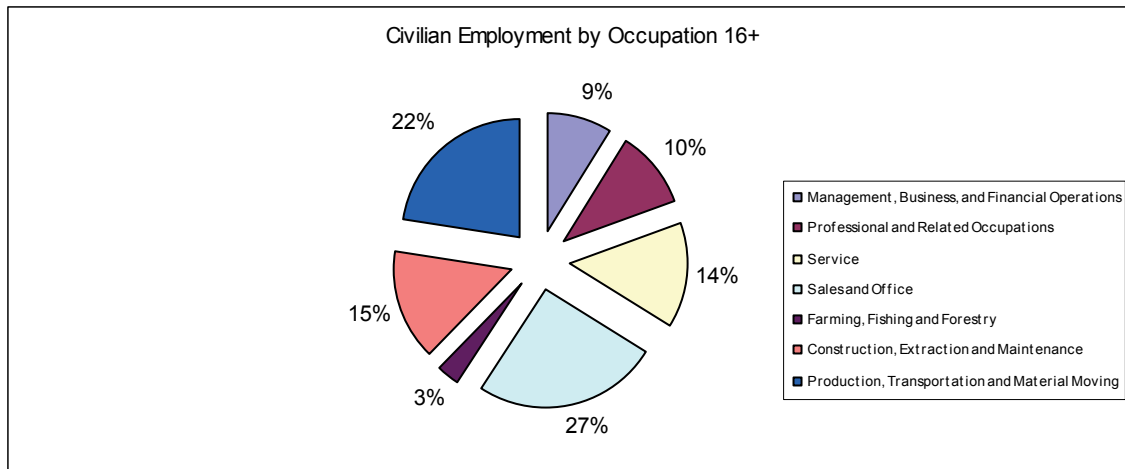
Educational Attainment 25+



MUNICIPALITY PROFILES

FORT MEADE

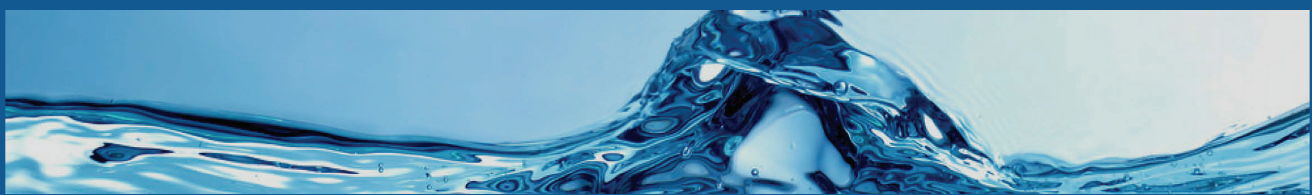
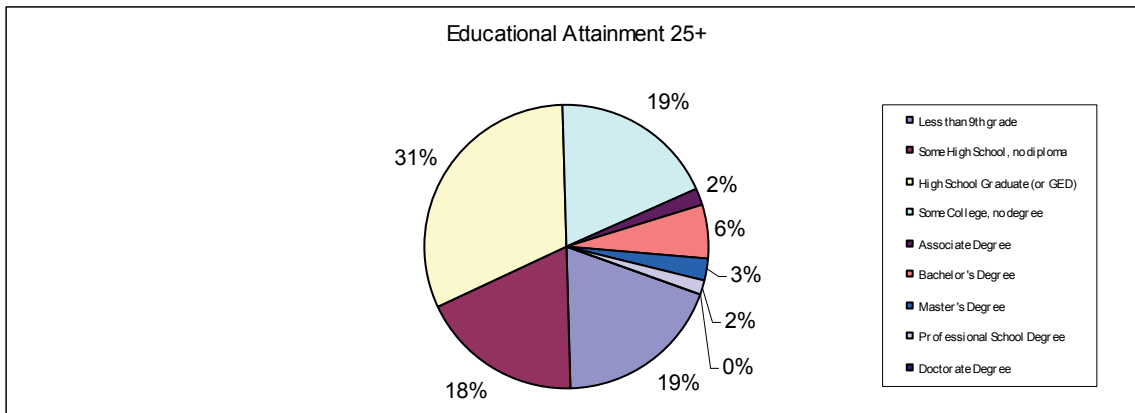
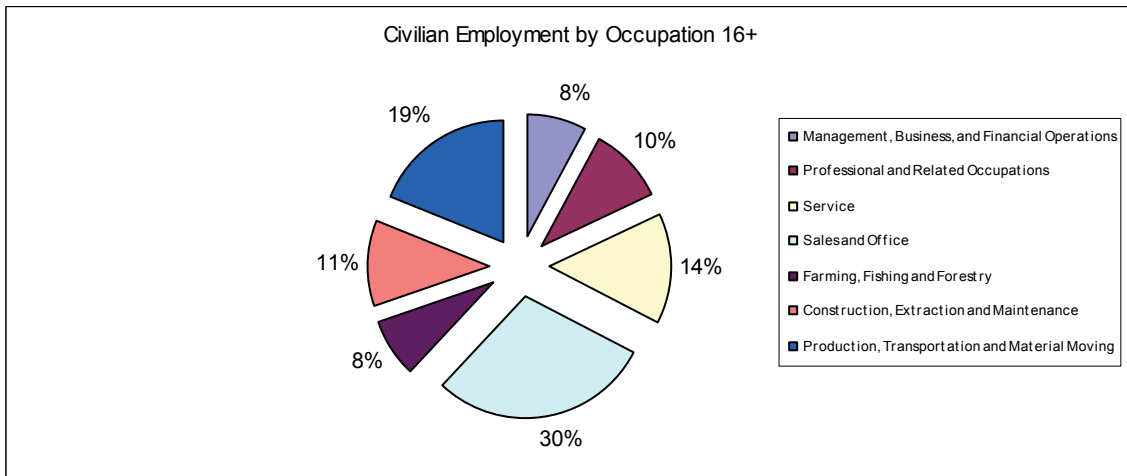
- ◆ The 2008 population is estimated at 5,715, a growth of nearly 1% since 2000. The city's population is projected at 5,817 by 2013, representing a 5-year growth rate of 1.5%.
- ◆ The 2008 median household income is estimated at \$39,145.
- ◆ Fort Meade is the oldest city in Polk County and has over 300 homes on the National Register of Historic Places, many date to the late 1800s.
- ◆ Approximately 2,269 individuals ages 16 or more are employed. Of this number, 38% are blue collar workers and 43% are employed in white collar jobs, while 19% are in service and farm industries.
- ◆ Approximately 2,440 city residents ages 25+ have achieved a high school diploma or better.



MUNICIPALITY PROFILES

FROSTPROOF

- ◆ The 2008 population is estimated at 2,995, a growth of 0.5% since 2000. The city's population is projected at 3,102 by 2013, representing a 5-year growth rate of nearly 4%.
- ◆ The 2008 median household income is estimated at \$35,870.
- ◆ The name was selected to convince potential landowners that the town would never have a frost that could destroy the large citrus-driven economy.
- ◆ Approximately 1,402 individuals ages 16 or more are employed. Of this number, 30% are blue collar workers and 46% are employed in white collar jobs, while 24% are in service and farm industries.
- ◆ Approximately 1,138 city residents ages 25+ have achieved a high school diploma or better.

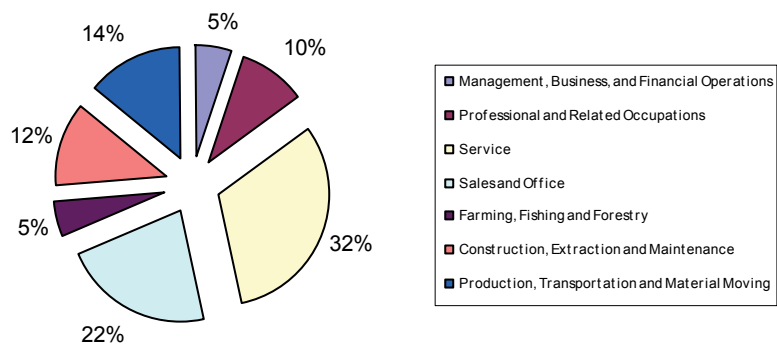


MUNICIPALITY PROFILES

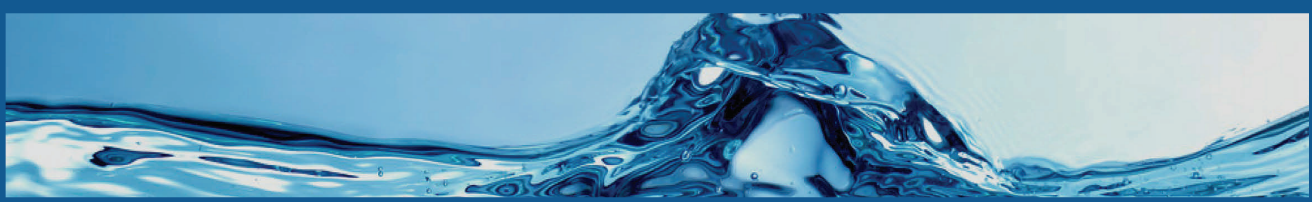
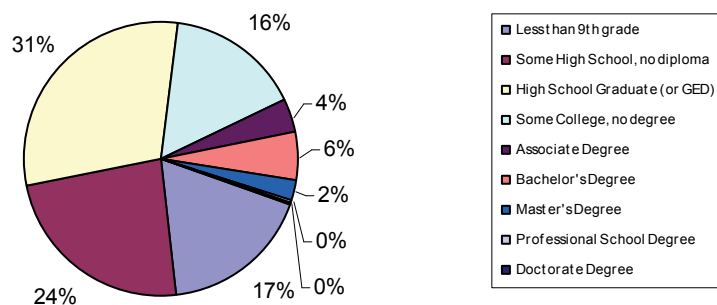
HAINES CITY

- ◆ The 2008 population is estimated at 17,113, a growth of nearly 30% since 2000. The city's population is projected at 19,499 by 2013, representing a 5-year growth rate of 14%.
- ◆ The 2008 median household income is estimated at \$31,028.
- ◆ The city is home to one of the state's oldest and largest citrus cooperative.
- ◆ Approximately 7,010 individuals ages 16 or more are employed. Of this number, 26% are blue collar workers and 37% are employed in white collar jobs, while 37% are in service and farm industries.
- ◆ Approximately 6,368 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

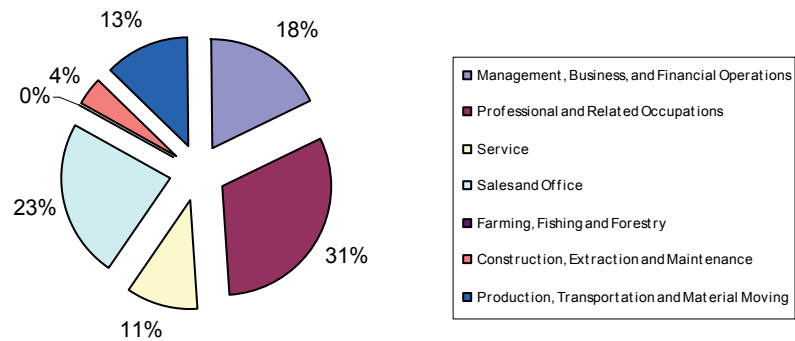


MUNICIPALITY PROFILES

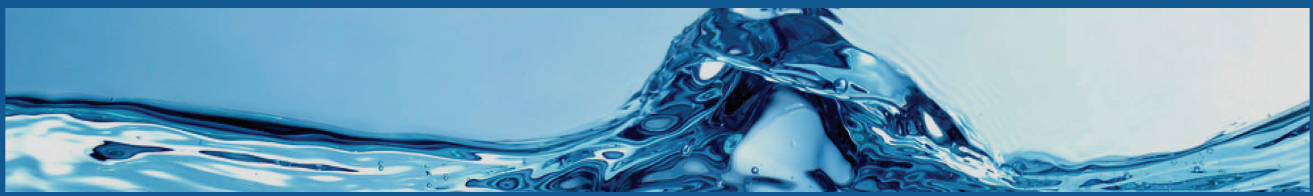
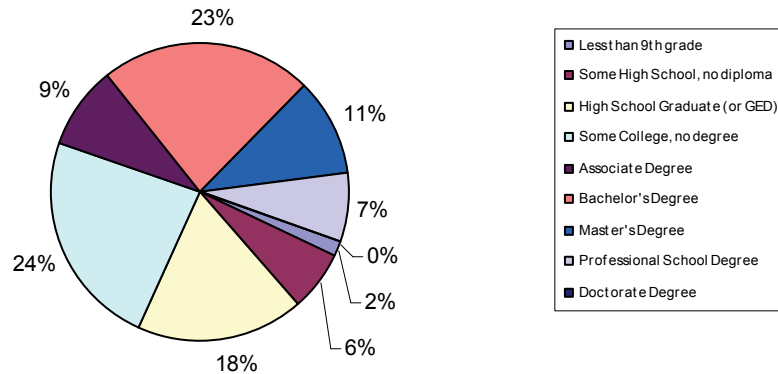
HIGHLAND PARK

- ◆ The 2008 population is estimated at 248, a growth of 1.5% since 2000. The city's population is projected at 255 by 2013, representing a 5-year growth rate of 1%.
- ◆ The 2008 median household income is estimated at \$47,115.
- ◆ The village's eclectic history includes Quakers as some of the original settlers.
- ◆ Approximately 94 individuals ages 16 or more are employed. Of this number, 17% are blue collar workers and 20% are employed in white collar jobs, while 13% are in service and farm industries.
- ◆ Approximately 172 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

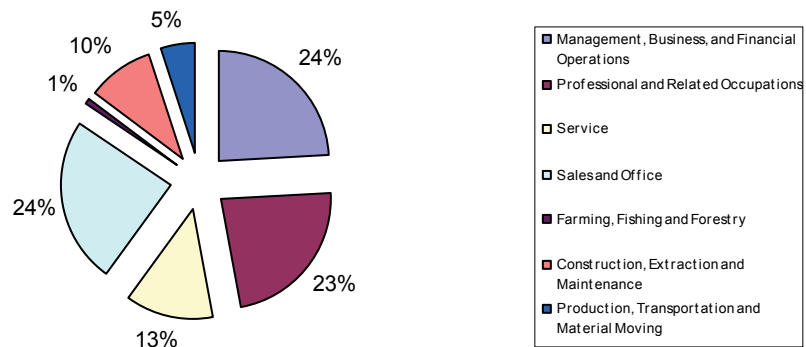


MUNICIPALITY PROFILES

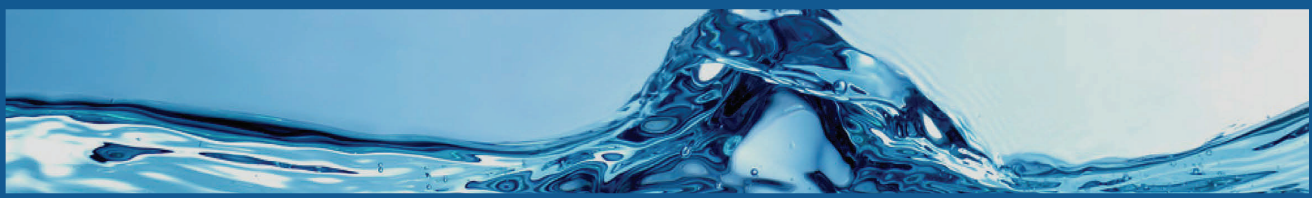
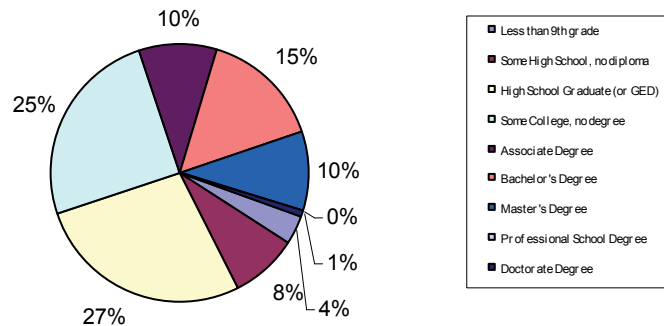
HILLCREST HEIGHTS

- ◆ The 2008 population is estimated at 327, a growth of 22% since 2000. The city's population is projected at 365 by 2013, representing a 5-year growth rate of 11%.
- ◆ The 2008 median household income is estimated at \$75,915.
- ◆ The smallest of the county's municipalities, encompassing an area of .2 sq. miles.
- ◆ Approximately 162 individuals ages 16 or more are employed. Of this number, 15% are blue collar workers and 70% are employed in white collar jobs, while 15% are in service and farm industries.
- ◆ Approximately 194 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

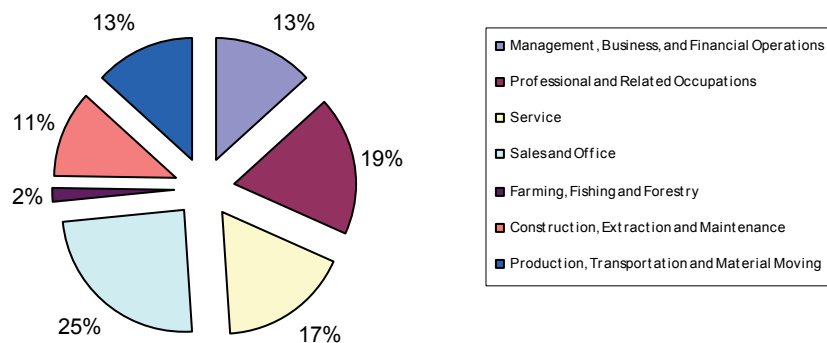


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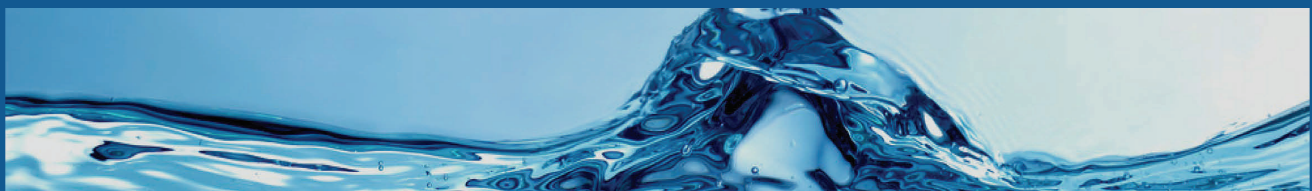
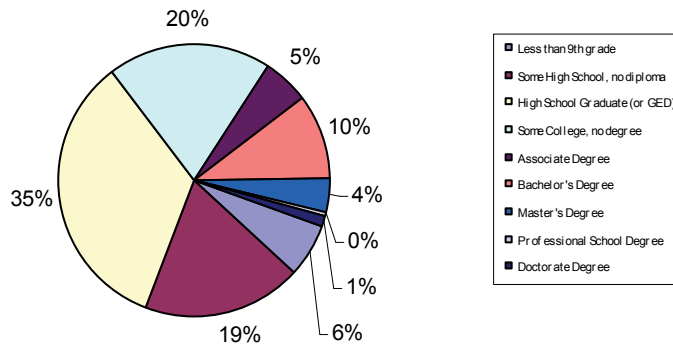
LAKE ALFRED

- ◆ The 2008 population is estimated at 4,406, a growth of 13% since 2000. The city's population is projected at 4,755 by 2013, representing a 5-year growth rate of 7%.
- ◆ The 2008 median household income is estimated at \$43,208.
- ◆ The city was first settled in the mid 1800's as a military outpost.
- ◆ Approximately 1,808 individuals ages 16 or more are employed. Of this number, 25% are blue collar workers and 56% are employed in white collar jobs, while 19% are in service and farm industries.
- ◆ Approximately 2,163 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

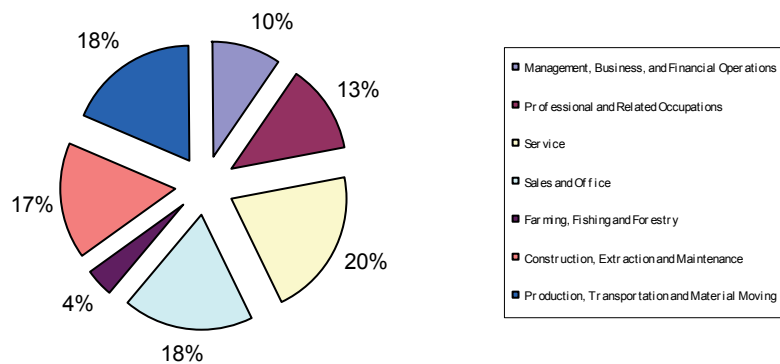


MUNICIPALITY PROFILES

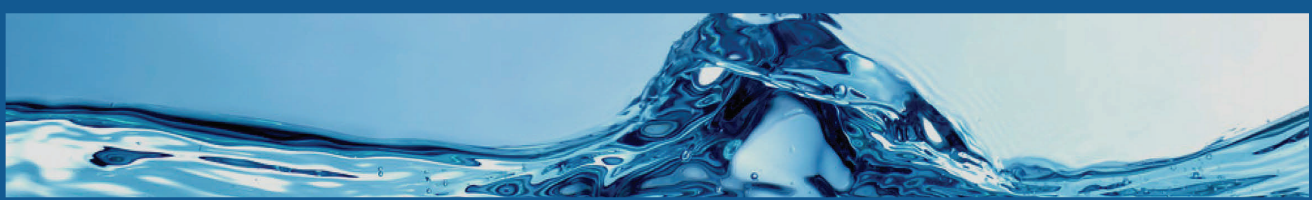
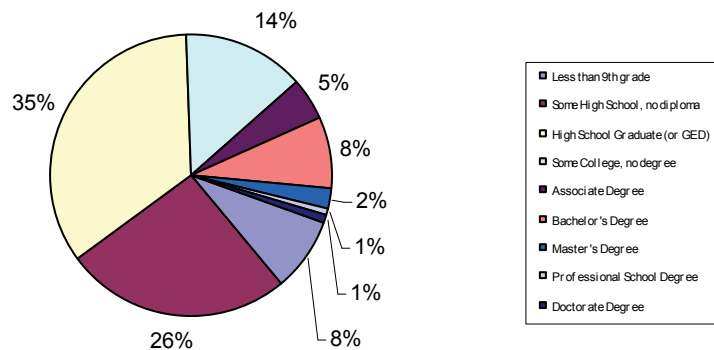
LAKE HAMILTON

- ◆ The 2008 population is estimated at 1,235 a growth of nearly 1% since 2000. The city's population is projected at 1,250 by 2013, representing a 5-year growth rate of 1%.
- ◆ The 2008 median household income is estimated at \$37,561.
- ◆ The town is the second smallest municipality in the county, encompassing 3 sq. miles.
- ◆ Approximately 479 individuals ages 16 or more are employed. Of this number, 35% are blue collar workers and 40% are employed in white collar jobs, while 25% are in service and farm industries.
- ◆ Approximately 527 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

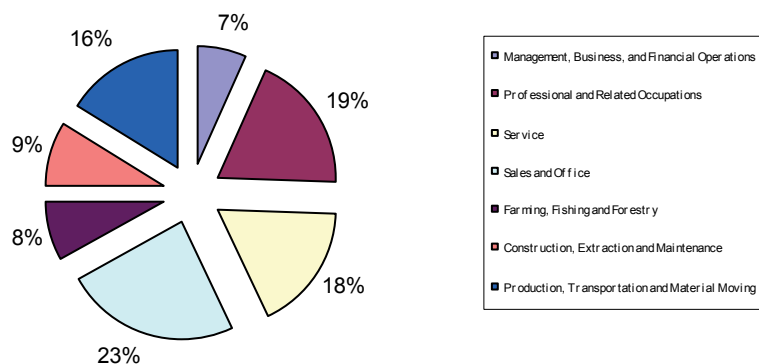


MUNICIPALITY PROFILES

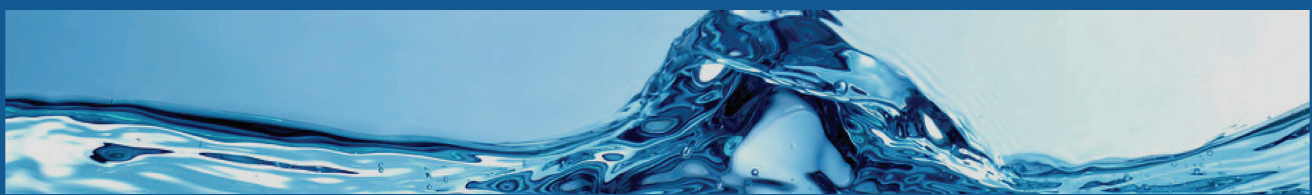
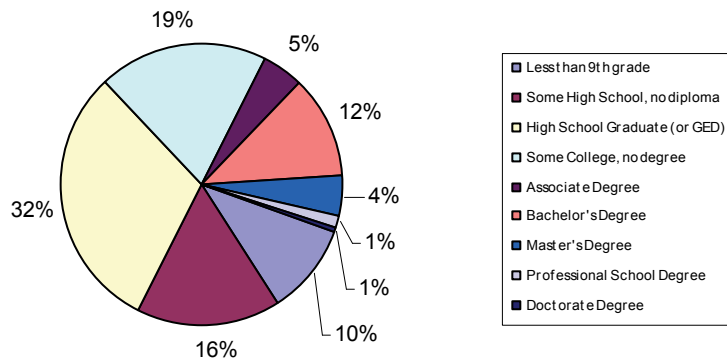
LAKE WALES

- ◆ The 2008 population is estimated at 13,613, a growth of 33% since 2000. The city's population is projected at 16,627 by 2013, representing a 5-year growth rate of 22%.
- ◆ The 2008 median household income is estimated at \$31,787.
- ◆ The city is home to one of the state's most unusual attractions, Spook Hill.
- ◆ Approximately 5,215 individuals ages 16 or more are employed. Of this number, 25% are blue collar workers and 49% are employed in white collar jobs, while 26% are in service and farm industries.
- ◆ Approximately 6,448 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

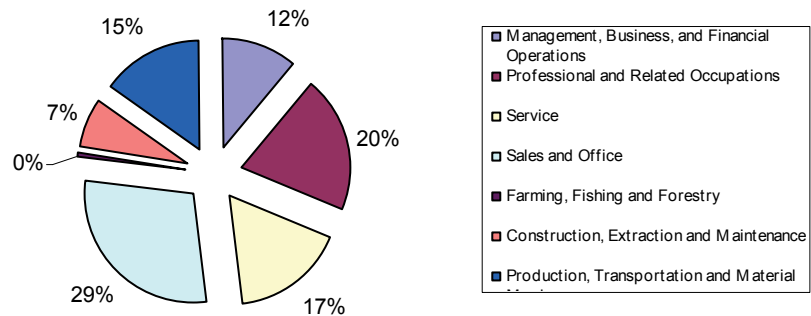


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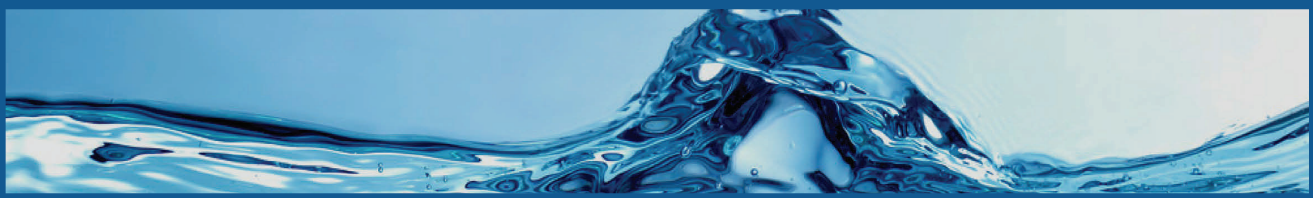
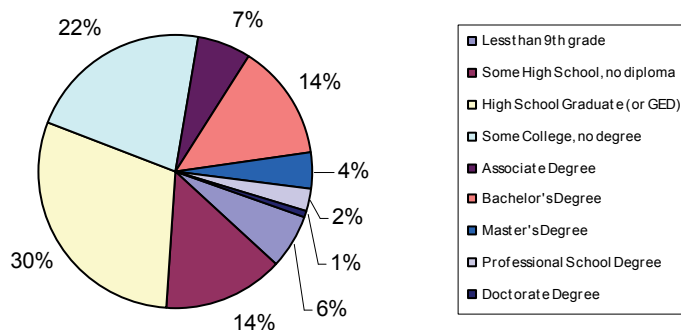
LAKELAND

- ◆ The 2008 population is estimated at 83,771 a growth of 6% since 2000. The city's population is projected at 88,083 by 2013, representing a 5-year growth rate of 5%.
- ◆ The 2008 median household income is estimated at \$38,348.
- ◆ The largest city in the county is home to Florida Southern College, designed by renowned architect Frank Lloyd Wright.
- ◆ Approximately 35,207 individuals ages 16 or more are employed. Of this number, 23% are blue collar workers and 60% are employed in white collar jobs, while 17% are in service and farm industries.
- ◆ Approximately 46,366 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

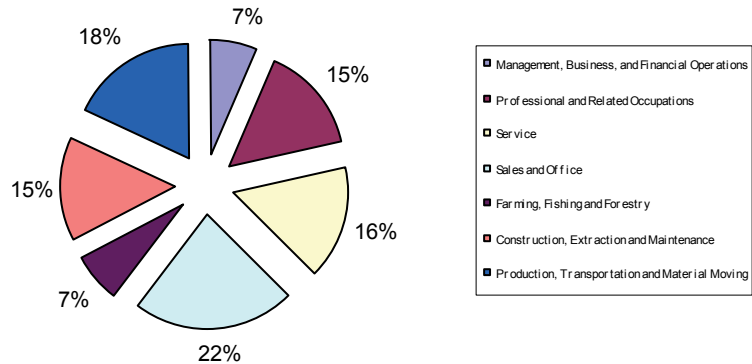


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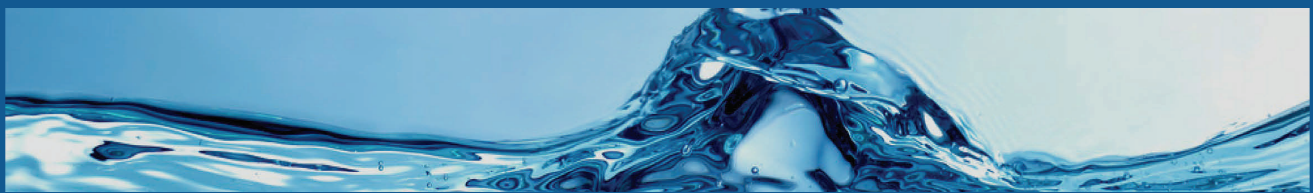
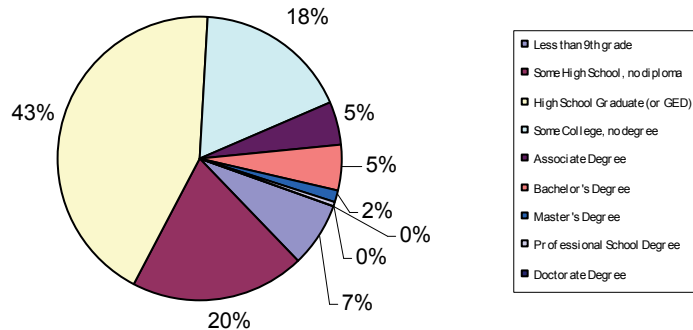
MULBERRY

- ◆ The 2008 population is estimated at 3,938, a growth of 22% since 2000. The city's population is projected at 4,328 by 2013, representing a 5-year growth rate of 9%.
- ◆ The 2008 median household income is estimated at \$33,385.
- ◆ The area is part of Bone Valley, a collection of bones and fossilized remains of prehistoric animals that are common to phosphate deposits.
- ◆ Approximately 1,350 individuals ages 16 or more are employed. Of this number, 33% are blue collar workers and 44% are employed in white collar jobs, while 23% are in service and farm industries.
- ◆ Approximately 1,959 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

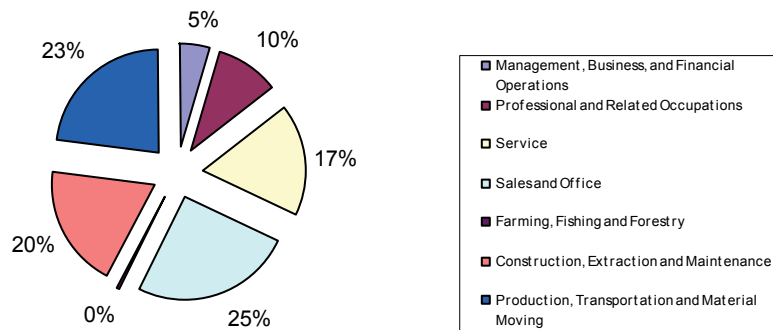


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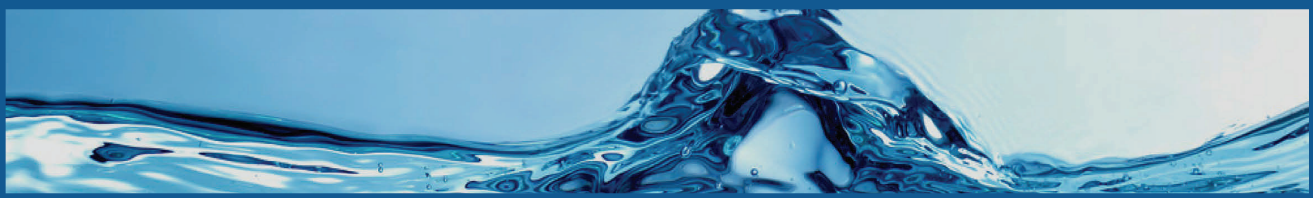
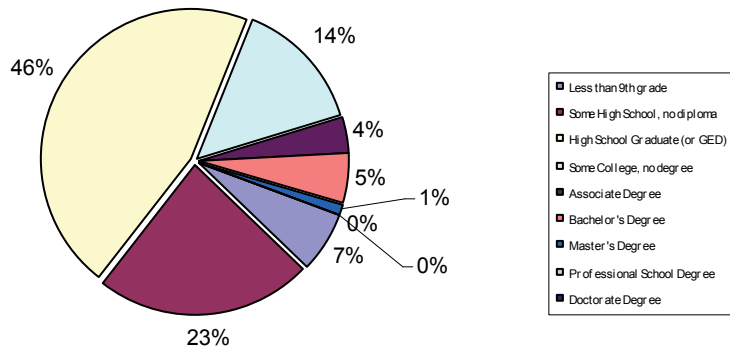
POLK CITY

- ◆ The 2008 population is estimated at 1,731 a growth of 14% since 2000. The city's population is projected at 1,871 by 2013, representing a 5-year growth rate of 8%.
- ◆ The 2008 median household income is estimated at \$42,639.
- ◆ The city is within the Green Swamp Wildlife Management Area, a critical recharge source for the Florida aquifer system.
- ◆ Approximately 815 individuals ages 16 or more are employed. Of this number, 42% are blue collar workers and 40% are employed in white collar jobs, while 18% are in service and farm industries.
- ◆ Approximately 757 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+

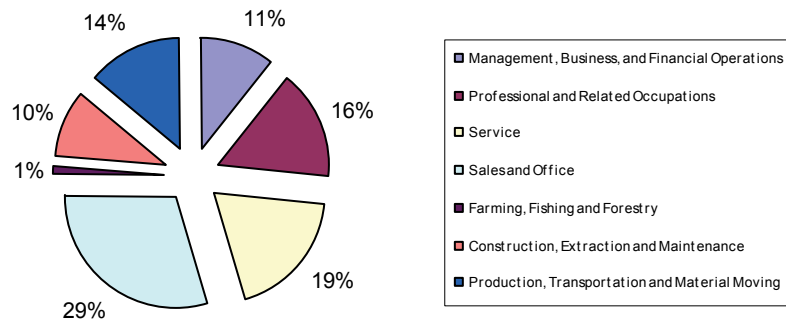


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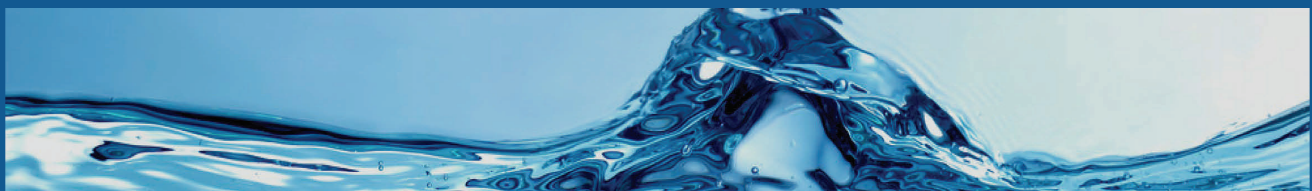
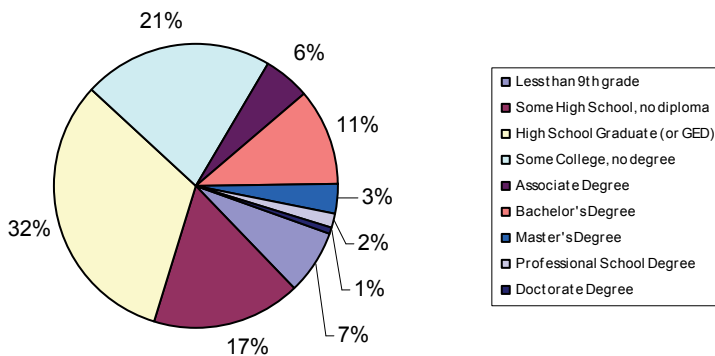
WINTER HAVEN

- ◆ The 2008 population is estimated at 29,748, a growth of 12% since 2000. The city's population is projected at 32,056 by 2013, representing a 5-year growth rate of 7%.
- ◆ The 2008 median household income is estimated at \$37,618.
- ◆ The city boasts 16 lakes connected by navigable canals.
- ◆ Approximately 11,335 individuals ages 16 or more are employed. Of this number, 24% are blue collar workers and 56% are employed in white collar jobs, while 20% are in service and farm industries.
- ◆ Approximately 21,471 city residents ages 25+ have achieved a high school diploma or better.

Civilian Employment by Occupation 16+



Educational Attainment 25+



SURVEY ANALYSIS

◇ OVERVIEW OF 2008 SURVEY

Today more than ever the most significant impact on the success and profitability of a company is its personnel. The ability (or lack thereof) to find, hire and retain quality employees is equal to business survival and longevity, and goes directly to the “bottom line.”

In order to more fully understand the local and regional workforce, one needs to go beyond the typical demographic, education and economic data and statistics readily available from numerous sources. Go right to the most important source - the local employers - for an honest and straightforward view. That is exactly what this first State of the Workforce Survey has done.

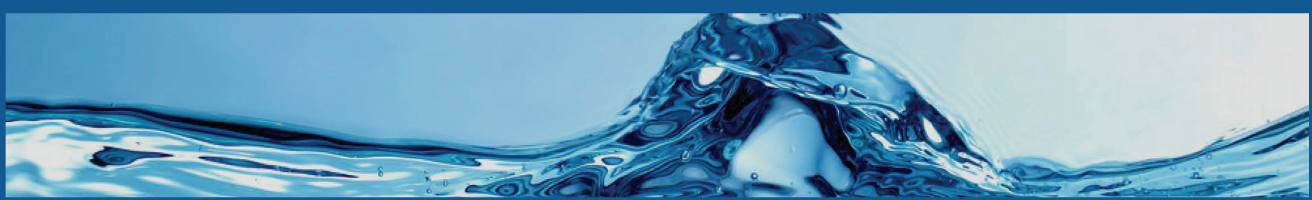
For presentation purposes, the analysis of the information provided by local employers who participated in the 2008 survey is divided into four sections:

- ◆ **Workforce Challenges**
- ◆ **Recruiting Workers**
- ◆ **Occupational Needs**
- ◆ **Training and Development**

Each report section that follows gives:

- A summary of the key survey results relative to that particular aspect of the workforce in Polk County
- Highlights of the most compelling findings, and
- Interesting differences by municipality, company size or industry sector, when applicable.

This report concludes with an aggregate description of the 2008 survey participant characteristics.



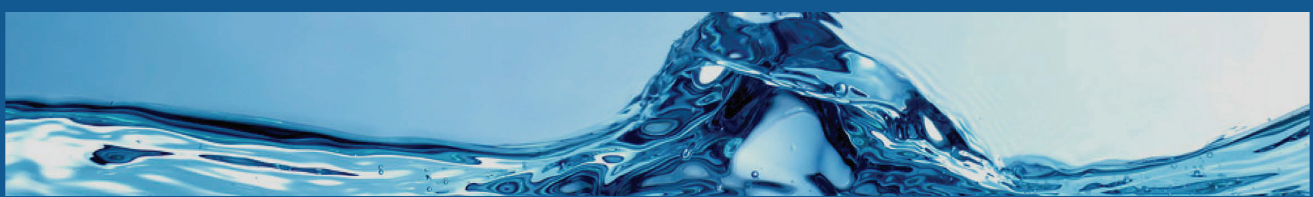
☑ AREA STRENGTH AND ADVANTAGES

What do employers consider advantages or strengths of Polk County?

- ◆ Over one-third of employers felt that Polk County's central location between two major metropolitan areas was its greatest asset.
- ◆ One quarter of employers indicated that support from local government was a key strength for Polk County. As the county continues to grow, the local government and community provides support for existing and new businesses.
- ◆ Low cost of living and the available labor pool were also key strengths selected by nearly a third of employers.
- ◆ Other perspectives on the greatest strengths of Polk County were offered by companies that valued either:
 - Hard working, dedicated pool of employees
 - The feel of a small community and the quality of life compared to large metropolitan areas
 - The various choices for education and training available throughout the county
 - The potential for growth and building business relationships

Key Finding - Polk County continues to be a great growth market for businesses, providing access to both a large customer base and available labor pool.

***Notable Quote:** "Polk County has worked very hard in the past few years to update programs available to the workforce and to provide training options for individuals with needs for vocational changes. In addition, economic development organizations have been actively pursuing quality employers for our County. In addition, as a CPA firm, Polk County offers an affordable cost of living and quality housing which is at or below that of larger metropolitan areas of the United States. Lastly, Polk County has recently focused on improving quality of life through education and recreation initiatives."*



WORKFORCE CHALLENGES

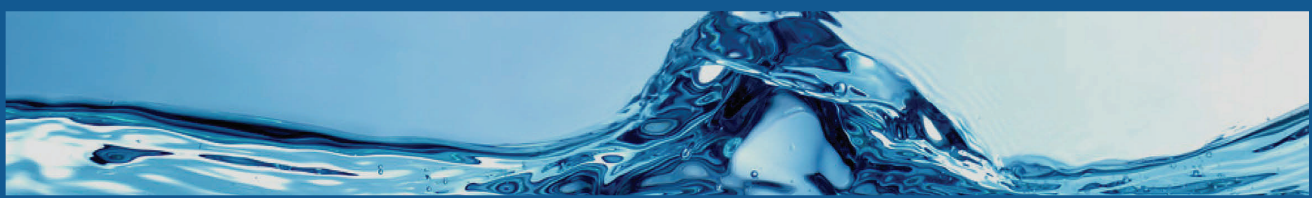
☑ AREA BUSINESS CHALLENGES

What are important challenges faced by local employers?

- ◆ Over half of employers (53%) indicated the lack of a skilled workforce as the greatest challenge to local industry. This is by far the most significant issue affecting employers, regardless of location, size or industry sector, according to survey respondents.
- ◆ Another significant challenge was the lack of an educated workforce. Nearly one fourth (22%) of employers indicated substandard K-12 public education and a labor pool without a high school degree was a significant factor.
- ◆ Other concerns outlined by employers included:
 - the economic downturn and rising fuel prices
 - the challenge of retaining good employees while competing with nearby higher-paying markets
 - inability to attract a more diversified base of industry
 - attracting higher-skilled professionals
 - rising costs of employment and/or overhead
 - high rate of turnover
 - concerns about transportation (traffic congestion and inadequate public transportation)

Key Finding - The shortage of skilled /educated workers is the most significant challenge for Polk County businesses.

Notable Quote: "Labor shortages and competition for top talent is an ongoing challenge for our and other industries. In addition, job growth in other industries in our footprint have caused an even greater demand for people with required skills and technical knowledge."



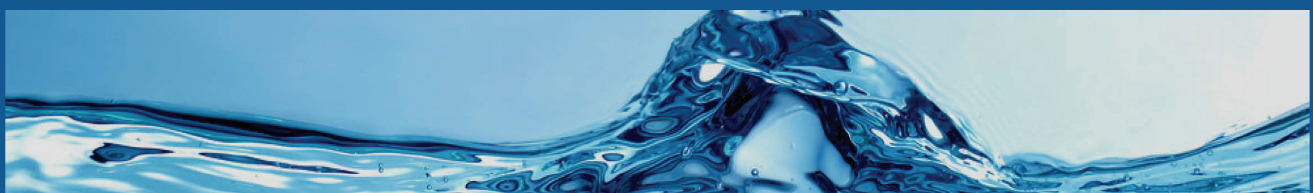
☑ CRITICAL WORKFORCE ISSUES

What critical workforce issues do local employers face?

- ◆ According to employers (see figure on next page) the three most critical workforce issues in Polk County are:
 - Improving public K-12 education (69%)
 - Fostering job creation and economic growth (65%)
 - Improving higher education (colleges and universities) 62%
- ◆ Five additional issues were ranked close behind
 - Supporting existing business (56%)
 - Improving job retention for current workers (48%)
 - Increasing more reliable public transportation (44%)
 - Creating more diversity in the types of businesses (41%)
 - Increasing training for workers (40%)
- ◆ Other areas of critical workforce issues included
 - Improving work readiness for youth
 - Improving management and supervisory skills
 - Attracting and retaining higher-paid jobs

Key Finding - The top critical issue that local employers are facing is the improvement of the public K-12 education system.

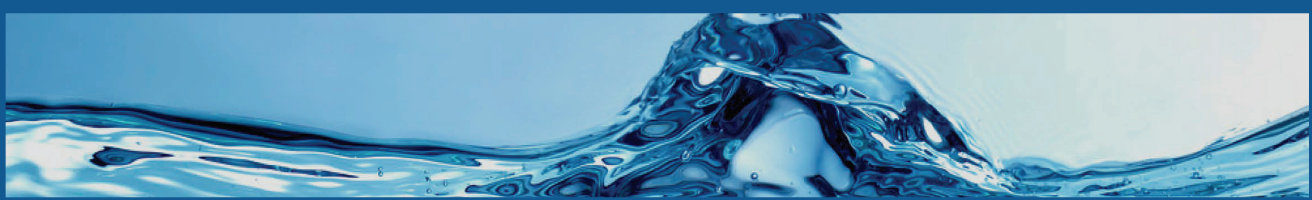
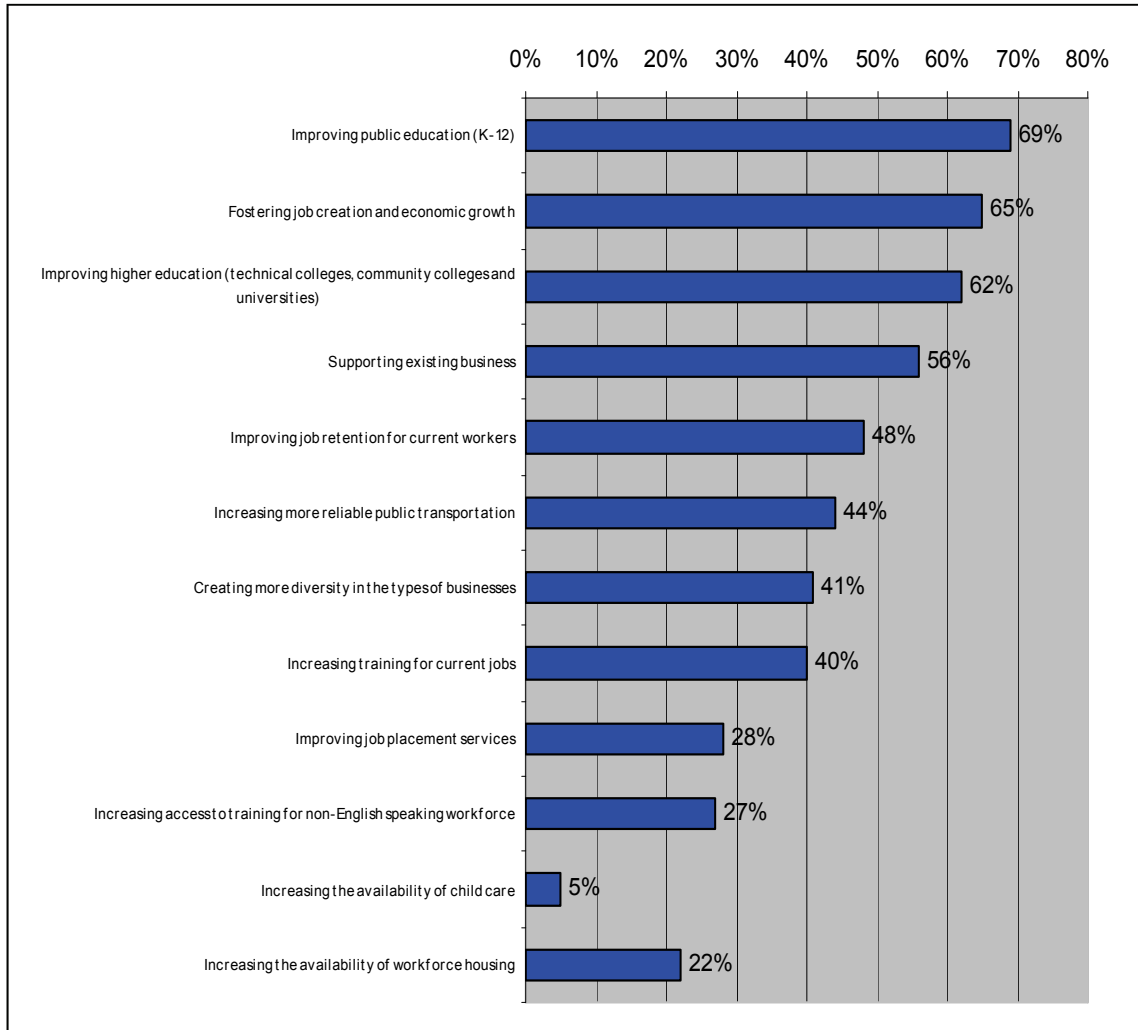
Notable Quote: “Challenges are keeping an active workforce that is properly trained. Polk Works and Workforce education must be funded and supported in order to produce a future productive workforce in Polk County.”



WORKFORCE CHALLENGES

☑ CRITICAL WORKFORCE ISSUES

Percentage of Respondents Indicating Items as Critical Workforce Issues



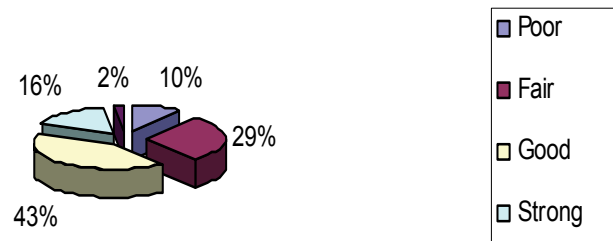
WORKFORCE CHALLENGES

☑ LOCAL EDUCATION

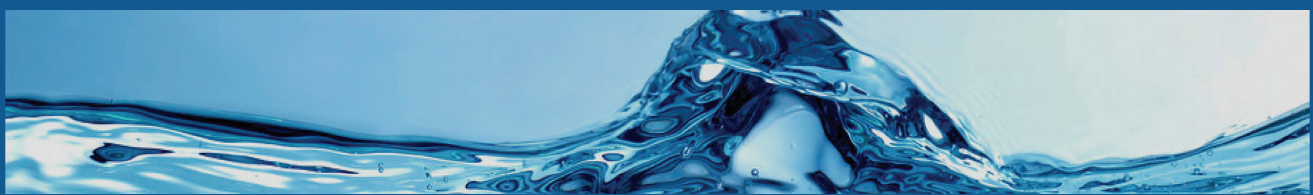
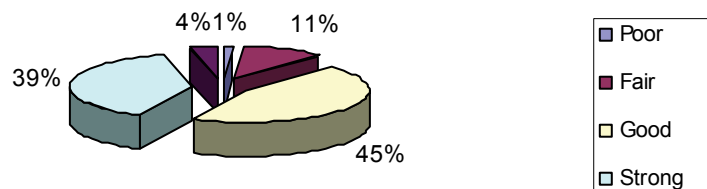
How do employers perceive the educational system in Polk County?

- ◆ Of concern is that thirty-nine percent (39%) of employers felt that Polk County's K-12 education system was "poor" to "fair." Very few considered it "exceptional" (2%).
- ◆ Nearly half of employers (43%) felt that Polk County's K-12 education system was "good", and 16% considered it "strong."
- ◆ In contrast, 84% of employers rated the county's post-secondary education system as "good" or "strong," although only 4% rated it as "exceptional."
- ◆ Respondents provided data regarding the percentage of employees with various levels of education. Nearly 11% of the workforce has less than a high school education; 47% has a high school or GED; 8% have received a job-related certification; nearly 28% have four years of college and nearly 10% of the workforce achieved a graduate or professional degree.

Quality of Public K-12 Education



Quality of the Post-Secondary Education



☑ RESOURCES FOR FINDING NEW EMPLOYEES

What sources are used to identify potential employees?

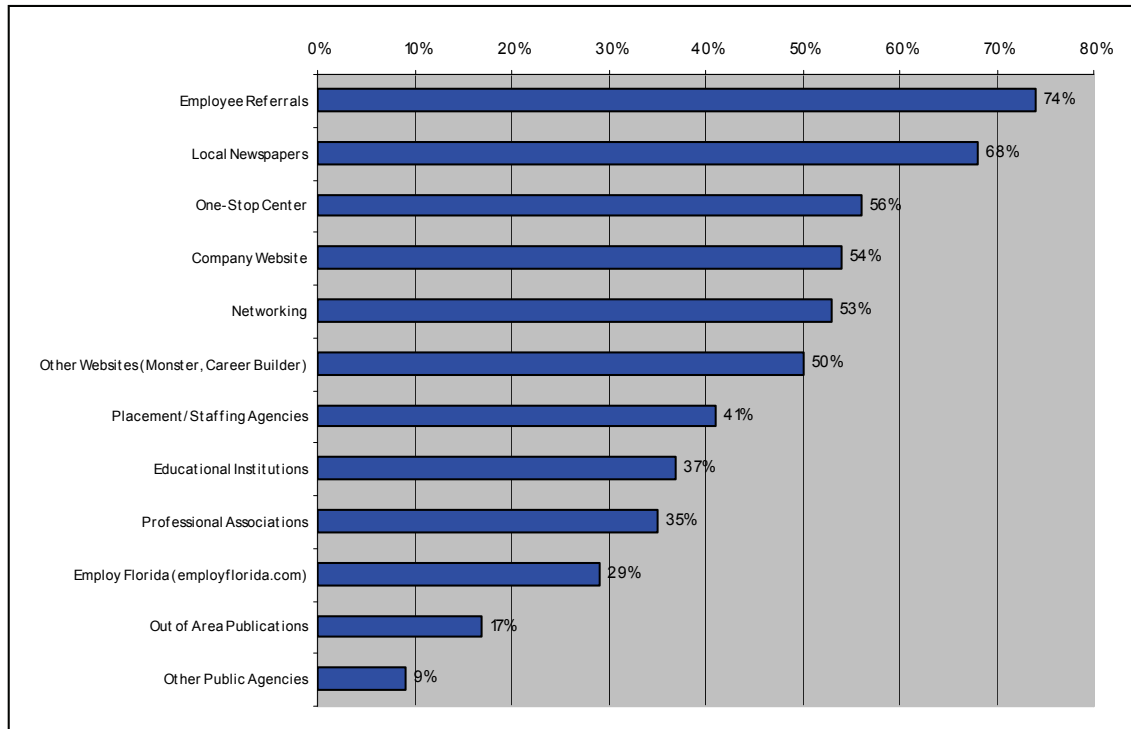
- ◆ Employee referrals were relied upon by the greatest share of employers (74%), and this source was also selected as the most useful and successful means of identifying potential new personnel (see charts on next pages).
- ◆ The other top sources that employers most frequently turn to when seeking qualified new hires included a mix of high tech, traditional media and personal interaction:
 - Local newspapers (68%)
 - One-Stop Career Centers (56%)
 - Company website (54%)
 - Networking (53%)
 - Major job boards (50%)
- ◆ Sources considered the most successful in identifying potential new employees include:
 - Employee referrals (23%)
 - Local newspapers (14%)
 - Networking (11%)
 - One-Stop Career Centers (10%)
- ◆ Employers still rely on newspaper “job listings” as their second choice when seeking new employees.
- ◆ Although a number of employers utilize the services of a One-Stop Career Center or staffing agencies, or turn to professional associations to help fill skilled positions, few consider them a significant resource.
- ◆ Identification of the top three sources for recruiting workers is remarkably consistent among employers, regardless of industry, size of company or location.



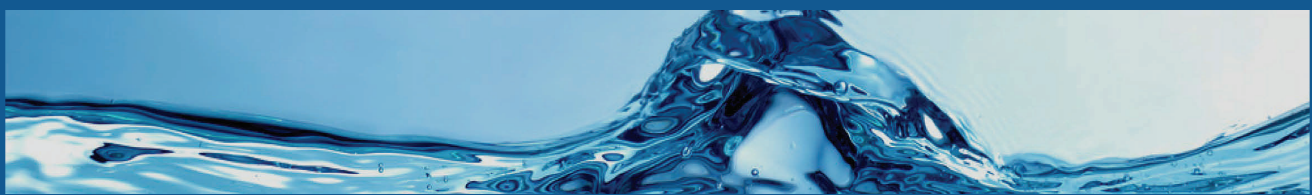
RECRUITING WORKERS

☑ RESOURCES FOR FINDING NEW EMPLOYEES

Sources Utilized for Identifying Potential Employees



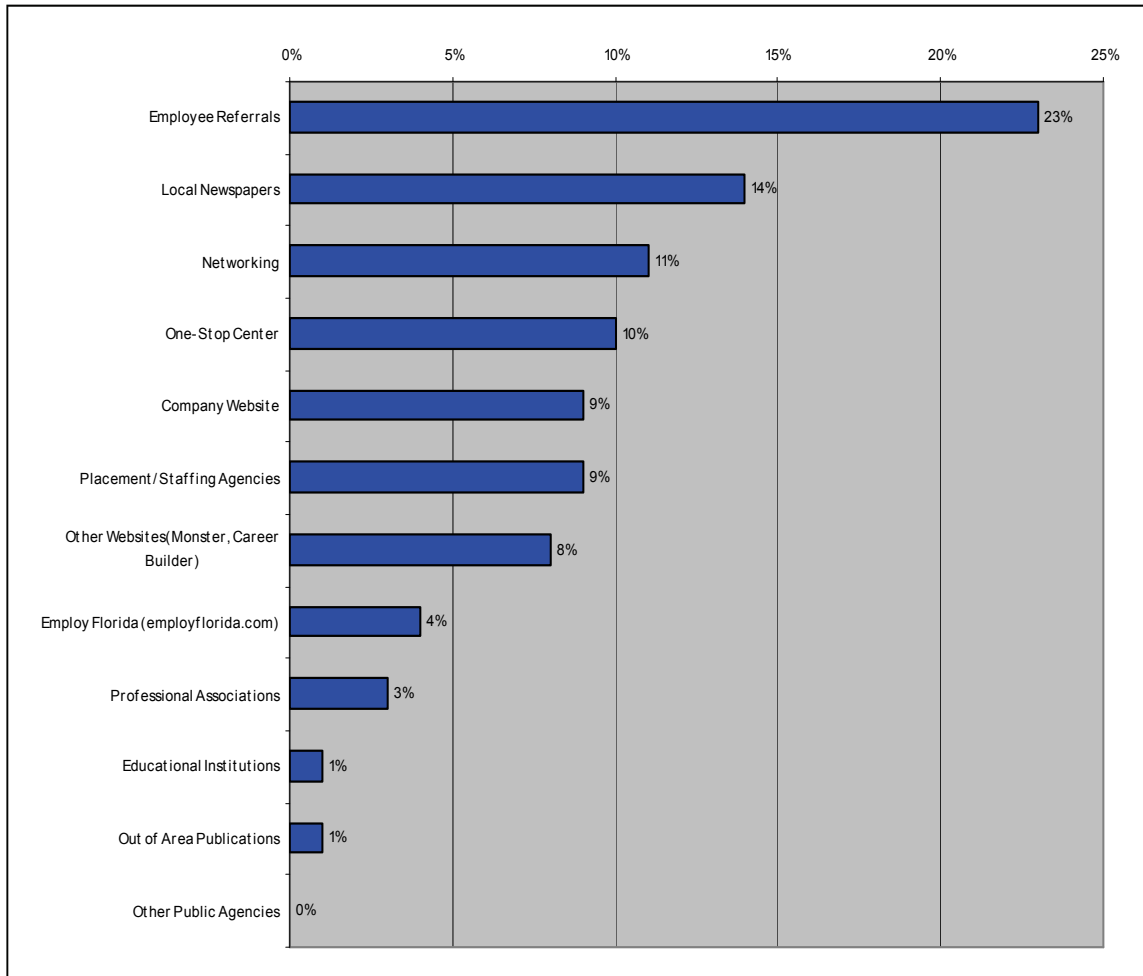
Key Finding ~ Employee referrals, newspaper job listings and networking are considered by many employers as the most useful resources for recruiting workers.



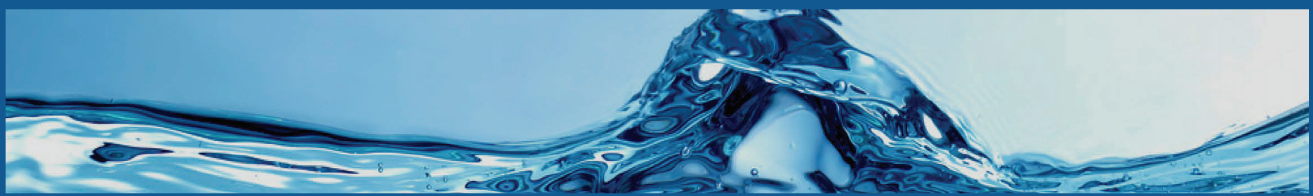
RECRUITING WORKERS

MOST USEFUL OR SUCCESSFUL SOURCE

Most Useful or Successful Resources for Filling Vacancies



Key Finding ~ When hiring new employees, employers' top concerns included work ethics, basic skills and applicants with good education.



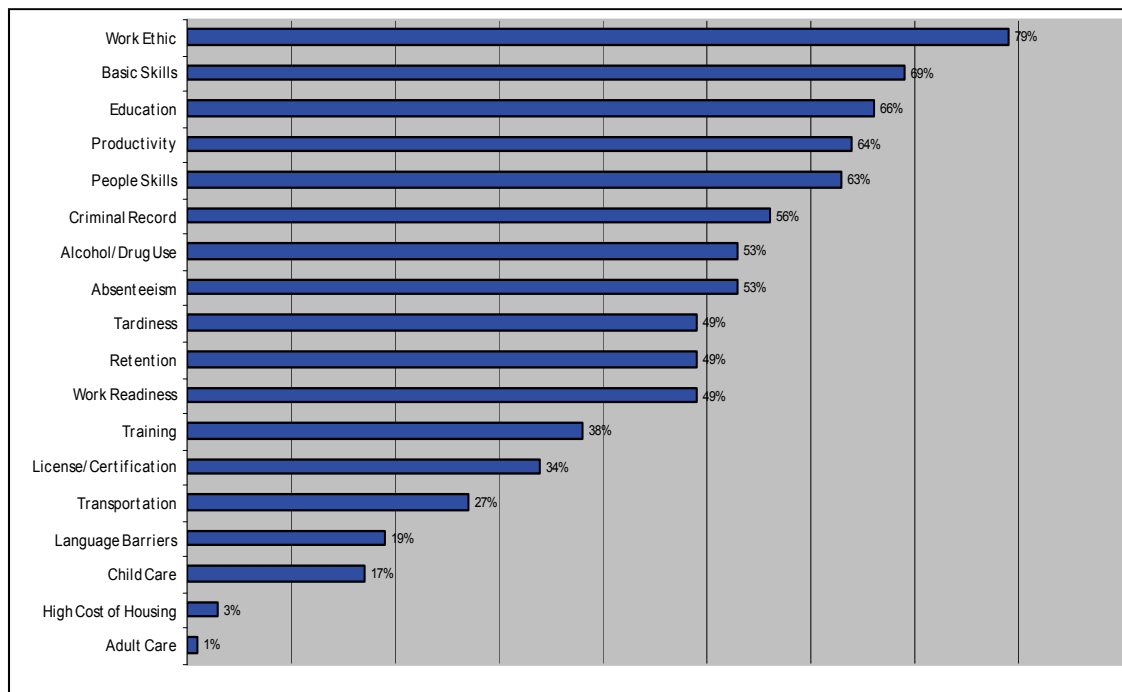
RECRUITING WORKERS

☑ HIRING CONCERNS

When hiring new employees, what are major concerns?

- ◆ The top five areas of concern to a company when hiring new employees were:
 - Work ethic (79%)
 - Meeting basic skills required for the job (69%)
 - Level of education (66%)
 - New employee productivity (64%)
 - The employee's level of people skills (63%)
- ◆ As shown in the table, a wide range of other concerns were also indicated, including criminal records, alcohol/drug use, absenteeism and tardiness that can impact not only the new hire but other employees as well.
- ◆ One in three employers indicated work readiness, training and license/certification as areas of concern.

Areas of Concern When Hiring New Employees



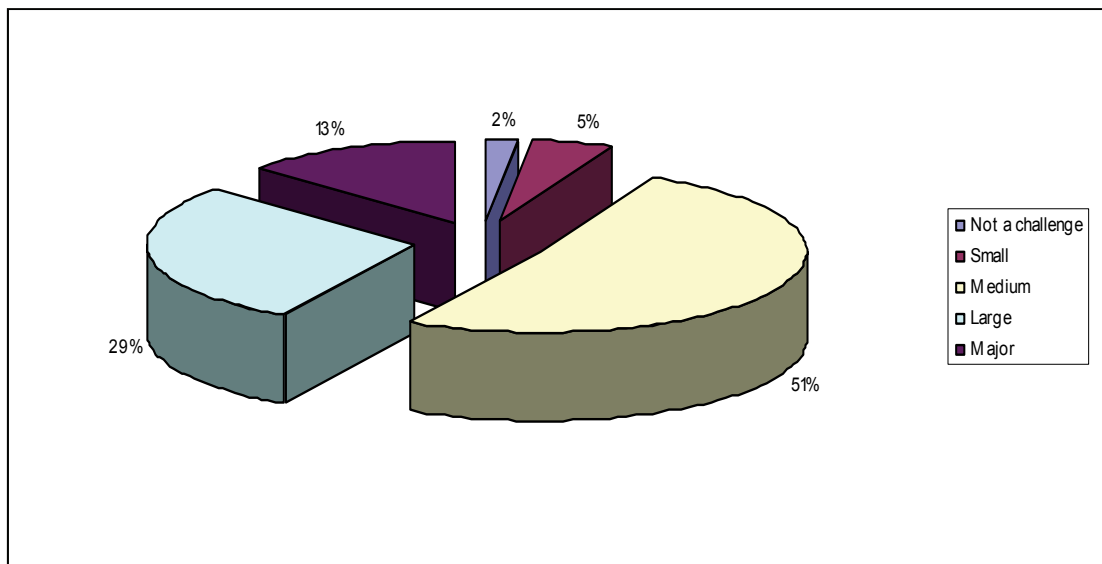
RECRUITING WORKERS

☑ DIFFICULTIES IN HIRING

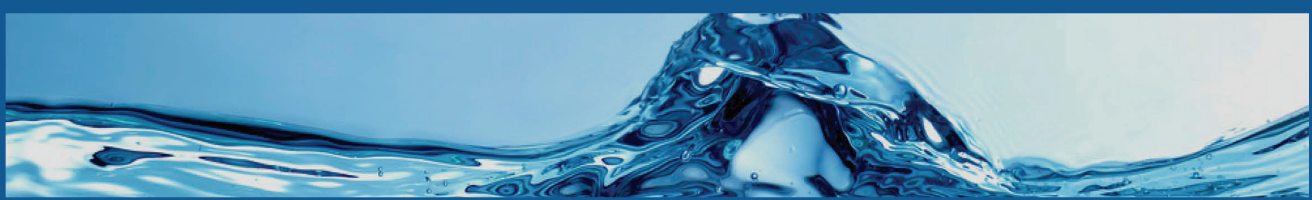
Is it a challenge to hire qualified workers?

- ◆ Approximately 42% of employers felt it was a very real (large or major) challenge to find qualified employees to fill new or vacant positions.
- ◆ A little over half of the employers (51%) acknowledged it was a medium problem, but did not perceive it to be such a high magnitude as those above.
- ◆ Despite the challenges indicated in the availability of a skilled, educated workforce, most employers did not indicate having considerable difficulty in finding qualified workers.
- ◆ Affordable housing did not seem to affect the hiring process. Forty-seven percent (47%) of respondents indicated lack of affordable housing was not a factor, while 46% indicated it was a “small” or “medium” factor. Only 7% identified affordable housing as a “large” or “major” factor.

Challenge in Hiring Qualified Workers



Key Finding - 4 of 10 employers in Polk County have a problem finding qualified workers to hire.

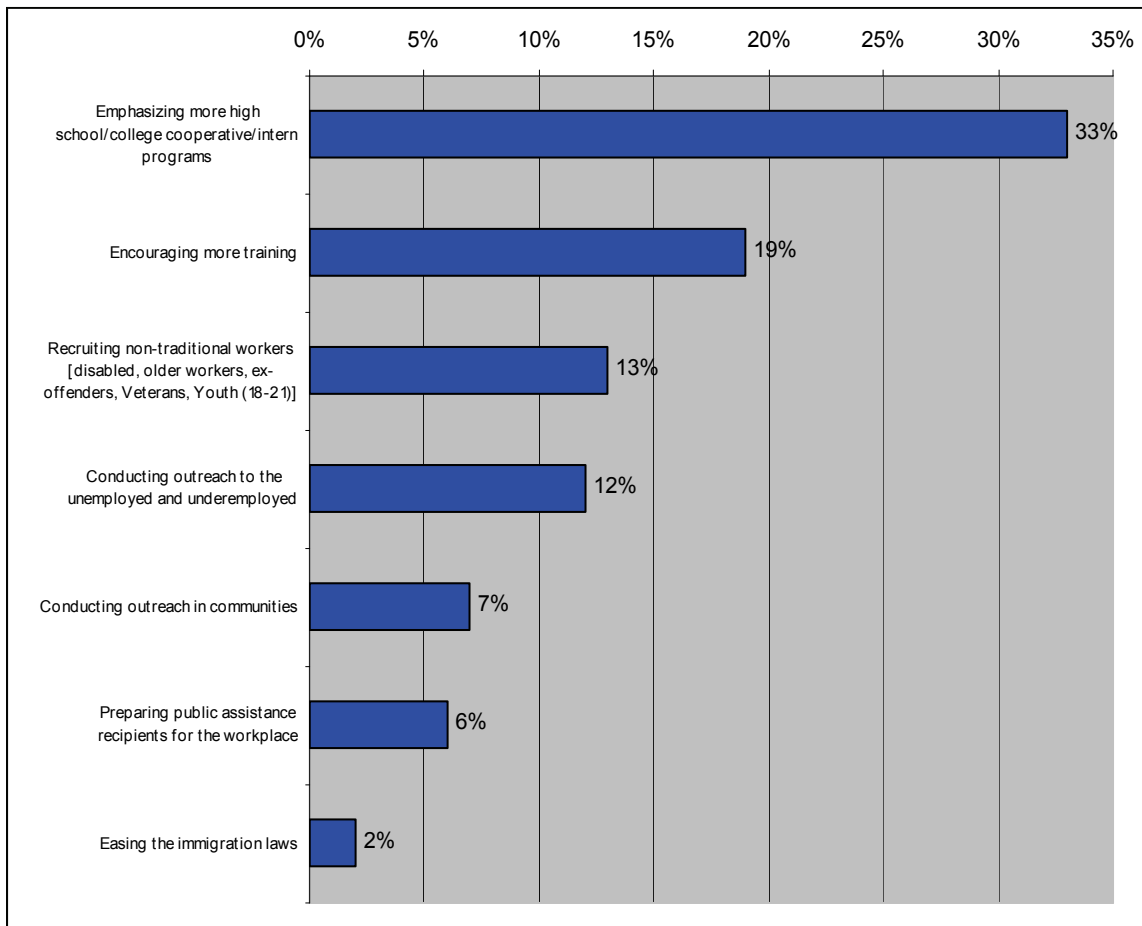


RECRUITING WORKERS

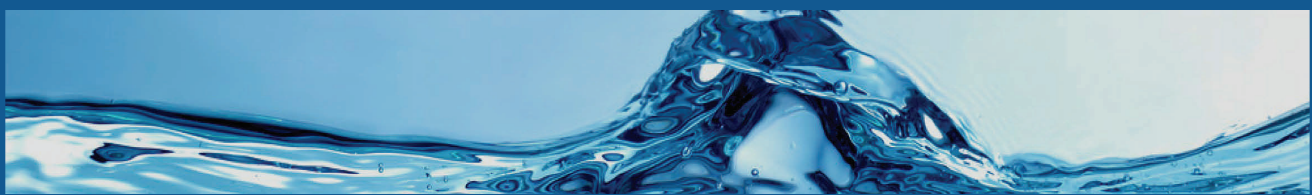
☑ WAYS TO MEET DEMAND FOR WORKERS

- ◆ Employers expressed a desire for more cooperative programs with high school and colleges as the top way to address the demand for local entry-level workers.

Ways to Meet Demand for Entry Level Workers



Key Finding - More education and training are the top two ways that employers believe would be most helpful in meeting demand for workers.

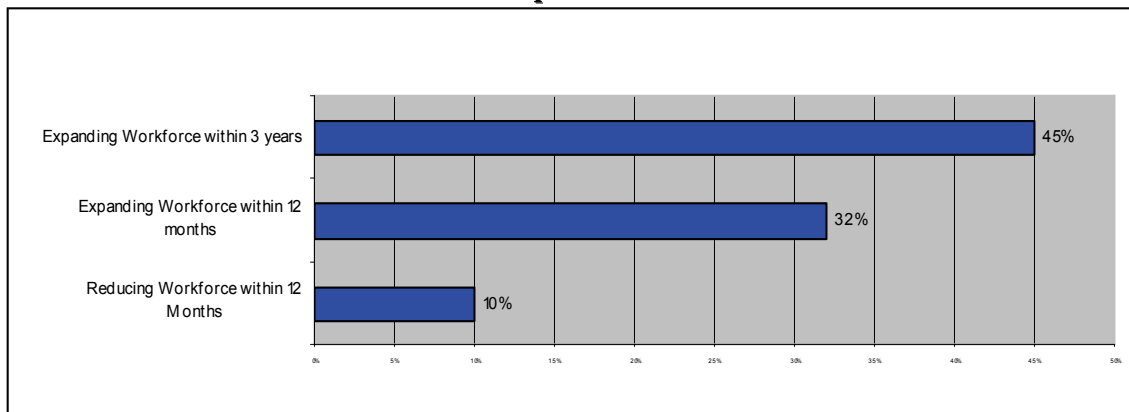


☑ IMMEDIATE EXPANSION PLANS

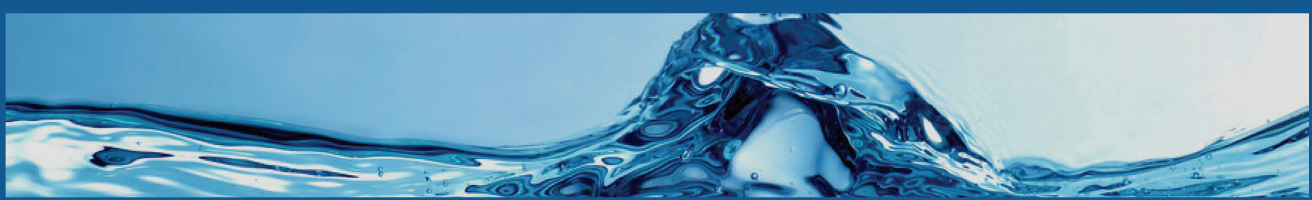
What is the outlook for occupational growth in Polk County over the next 12 months?

- ◆ Respondents did not indicate major expansion plans over the next 12 months. Sixty-six percent indicated no plans, while 34% indicated they planned on expanding their workforce over the next 12 months.
- ◆ Nearly all of the employers who plan to expand their workforce will require at least a high school diploma.
- ◆ Leading this projected workforce were health services, banking and education industries.
- ◆ Forty-five percent (45%) of employers reported plans to expand their businesses over the next three years, a slightly larger percentage than those planning to expand over the immediate 12 months.
- ◆ The difference between these responses appears to be due to a larger percentage of employers having a more positive economic outlook relative to three years. This may be indicative of some uncertainty in the more immediate timeframe.

Plans to Expand/Reduce Staff



Key Finding - One in three employers plans on expanding their workforce over the next 12 months. The need cuts across a variety of industry sectors.

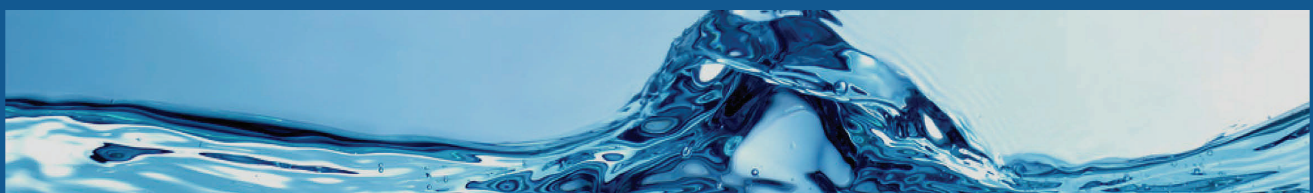


☑ LONGER-TERM EXPANSION PLANS

What is the outlook for occupational growth in Polk County over the next three years?

- ◆ Generally, the outlook of the types of positions for the next three years resembled what was observed for the 12-month period, in terms of the types of occupations anticipated for expansion of their workforce.
- ◆ In general, a large proportion of professional fields were reported as being in high demand for the longer term outlook. Nearly 50% of the projected openings required a bachelor's, graduate or professional degree.
- ◆ More significantly, few employers (9%) planned on reducing their workforce. A whopping 91% indicated they have no plans for reducing staffing levels over the next 12 months.
- ◆ However, it should be noted that firms may be less candid in sharing information about possible reductions in staffing due to the sensitive nature of such actions.
- ◆ The proportion of firms expecting to expand, and those expecting to reduce staff, is indicative of a positive outlook for the local economy and continued demand for a skilled workforce.

Key Finding - Less than 1 in 10 employers expect staffing reductions in the coming year.



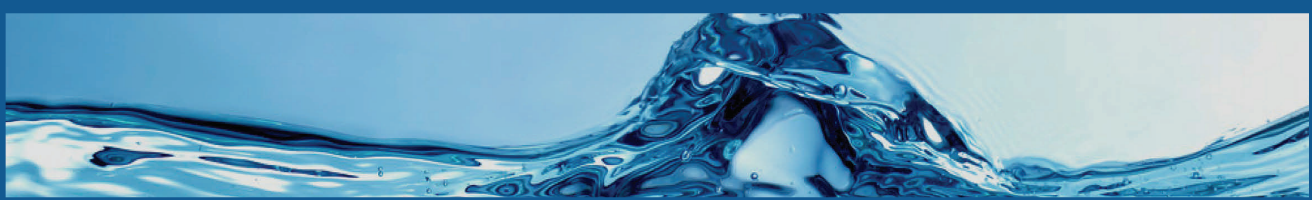
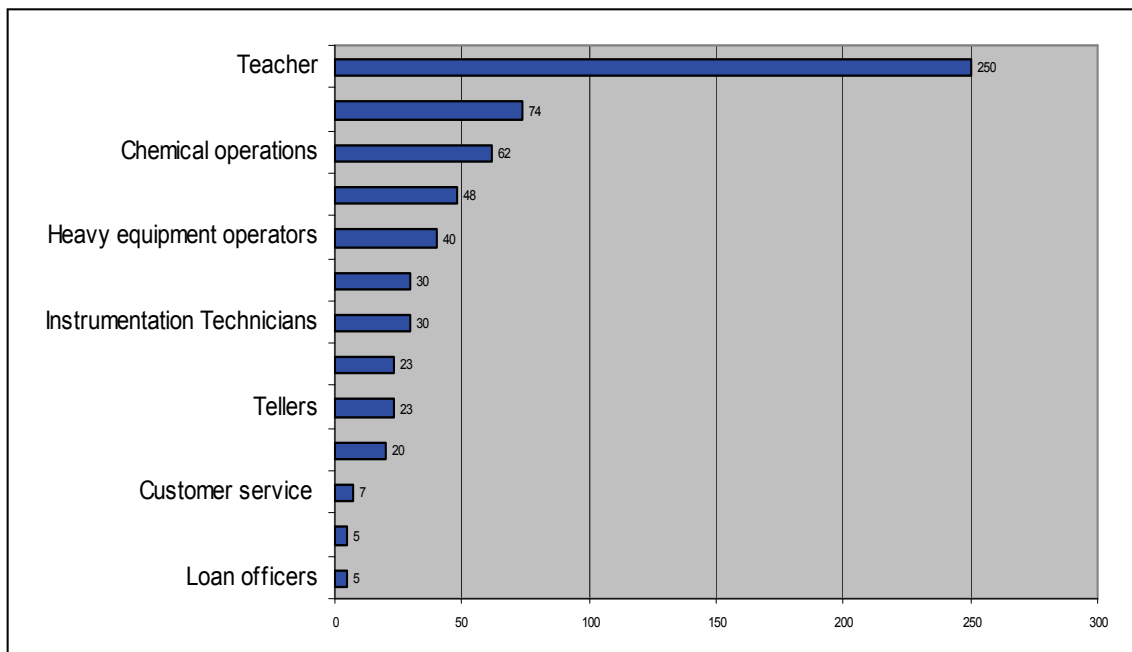
OCCUPATIONAL NEEDS

FUTURE EXPANSION PLANS

What is the outlook for occupational growth in Polk County over the next three years? (continued)

- ◆ For specific positions, the largest numbers of openings were in skilled trades:
 - Chemical operations
 - Heavy equipment operators
 - Machine operators
 - Maintenance technicians
- ◆ Among professional positions:
 - Teachers (K-12)
 - Engineers specializing in water resources or R&D
 - Geologists
 - Financial planners
- ◆ In the medical field, nurses (RN/LPN/CNAs) and other healthcare positions of all levels were listed by employers as high-demand areas.

Future Plans to Expand Staff—by Position

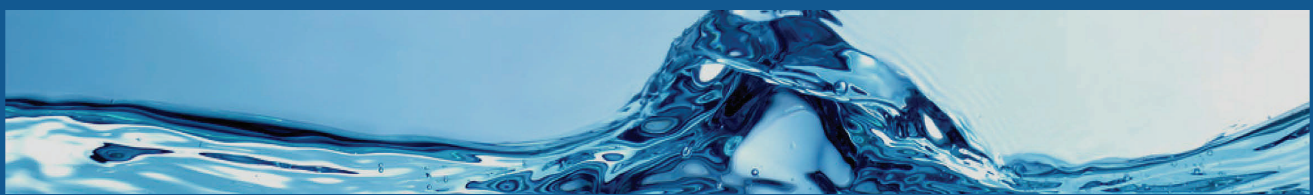


☑ IMPACT OF LOCAL LABOR MARKET

What difficulties are employers having due to the lack of available skilled workers?

- ◆ Despite the challenges of finding qualified workers, a majority of employers (56%) reported little or no difficulty in recruiting workers in one or more specific occupations in Polk County.
- ◆ The array of occupations identified as “difficult to fill” mirror in large part the previously reported occupational outlook responses. Among employers expressing difficulty recruiting skilled workers, the positions include:
 - Healthcare professionals
 - Engineers and electricians
 - Maintenance technicians
 - CDL drivers
 - Utility service workers
 - Customer Service Representatives
 - Skilled labor
 - Warehouse and production workers
 - Welders
- ◆ Among employers expressing difficulty recruiting skilled workers, the most frequent consequence of these struggles was an increased workload for current staff (57%) (see chart on next page).
- ◆ These employers have also had a number of other adverse impacts on their business as a result of labor market shortages, including
 - Decrease in productivity (28%)
 - Inability to expand (14%)
 - Decrease in quality (12%)
 - Loss of clients (11%)

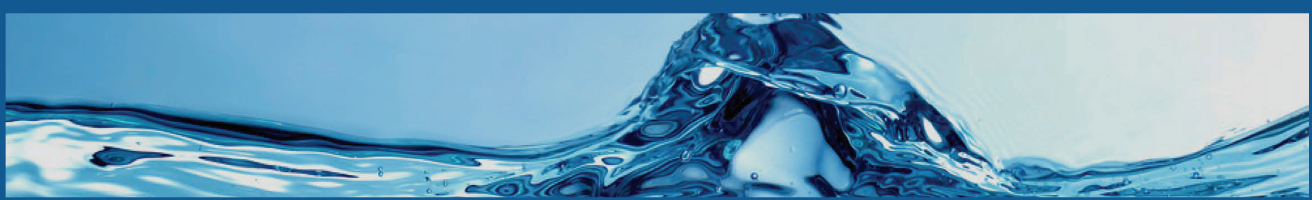
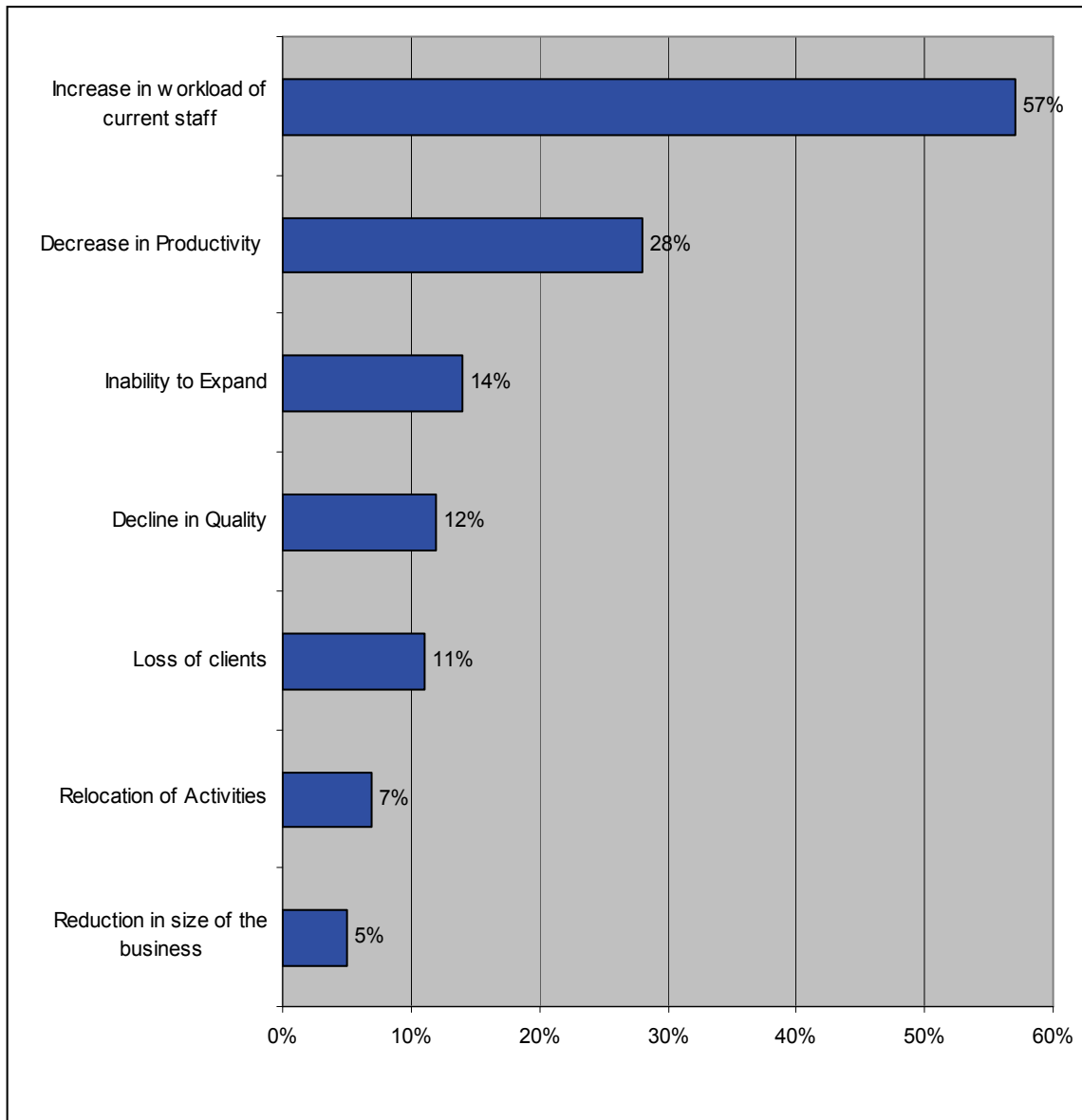
Key Finding - Due to the lack of available skilled workers, more than half of employers have to increase the workload of current staff.



OCCUPATIONAL NEEDS

IMPACT OF LOCAL LABOR MARKET

Difficulties Due to Shortages of Skilled Workers

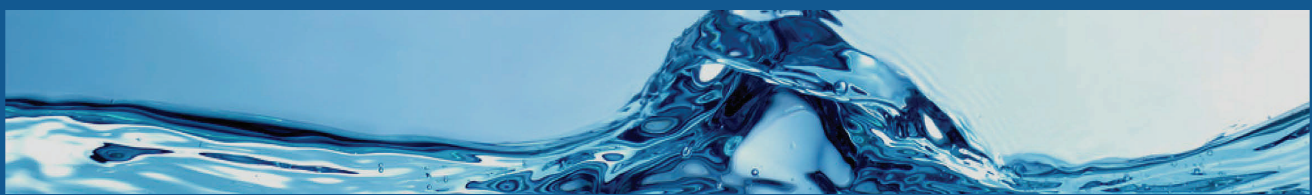


☑ CURRENT AND FUTURE TRAINING NEEDS

What types of skills or competencies do your employees need?

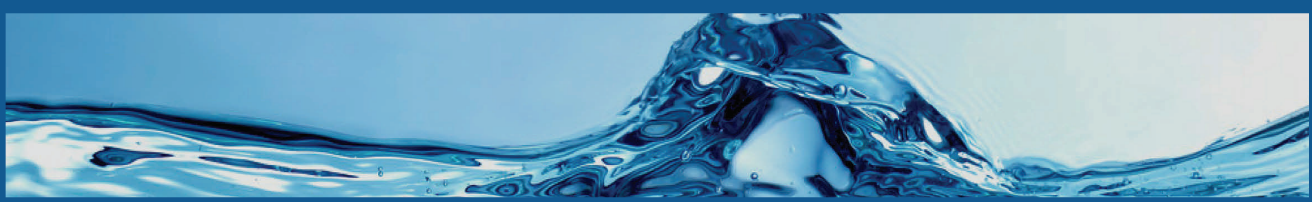
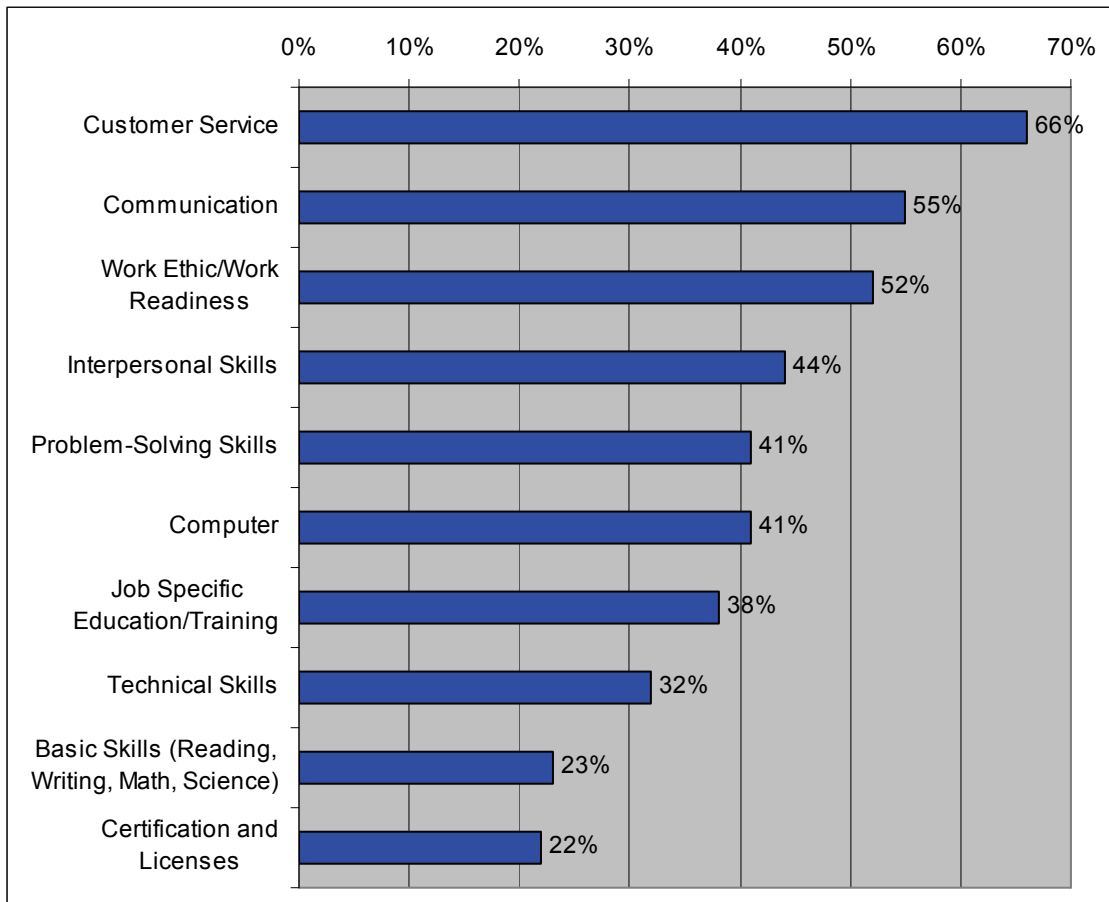
- ◆ Employers were asked to list the five most important skill areas for their business. Over 66% of local employers indicated customer service as the most important skill area required by their business.
- ◆ Local employers also reported the following as being important skill areas needed for their workers:
 - Communication
 - Work ethic/work readiness
 - Interpersonal
 - Computer skills
 - Problem-solving
 - Job-specific skills, ranging from skilled trades to training in specialized professional fields
- ◆ Generally employers expressed the need for staff equipped with basic skills that allowed them to perform a variety of tasks and to properly communicate with co-workers and customers.
- ◆ 51% of employers reported having groups of workers who currently need specialized training.

Key Finding - Current employees are in most need of communications and work ethic skills.



☑ CURRENT AND FUTURE TRAINING NEEDS

Needed Skills and Competencies

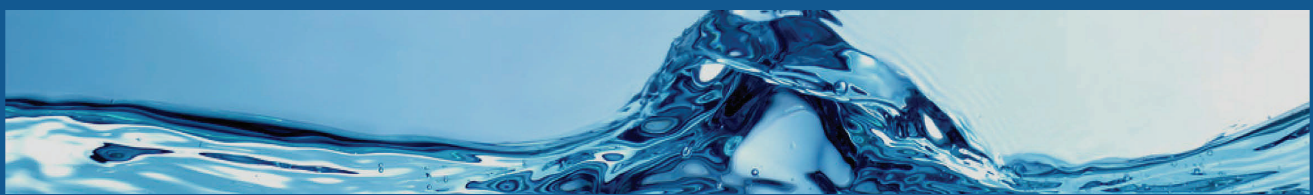


☑ CURRENT TRAINING EFFORTS

What are employers currently doing to provide training for their employees?

- ◆ 81% of employers provide some type of training for their workforce.
- ◆ The majority of the training is job-specific, and cuts across all industry sectors, location and size of company.
- ◆ The more generic programs currently provided by employers include training in:
 - Customer service/communications
 - Occupational safety
 - Supervisory and management skills
 - Computer skills
 - “Soft skills” (i.e., problem solving, work ethics, punctuality)
- ◆ Much of this training is provided internally, through an “on-the-job” approach, but many firms also conduct formal group training sessions.
- ◆ The large majority (73%) of employers that provide training for their workforce include both internal and external programs.
- ◆ Additionally, many employers offered continuing education training at local educational institutions to further their employees’ careers or provide required job-specific certifications and licenses.

Key Finding - Nearly all local employers provide some additional training for current workers, and the large majority provide both external and internal programs.

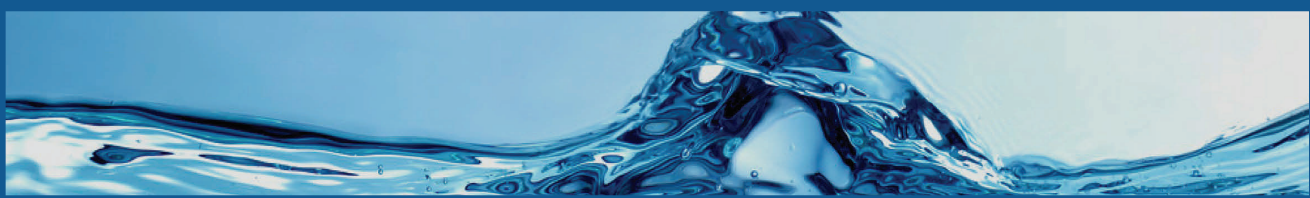


☑ EMPLOYEE TRAINING NEEDS

What type of specialized training is most needed?

- ◆ Some of the more common employee training needs compiled by local employers included:
 - Computer skills (Microsoft Office)
 - Electronics and instrumentation
 - ESL training
 - Production technician
 - Forklift training
 - Waste water treatment
 - Maintenance mechanic
 - Electrical
 - Welding
- ◆ Among these types of training, basic computer software represented the most prevalent need, spanning all industries and size of business.

Key Finding - The majority of employee training needs consist of basic computer software programs.

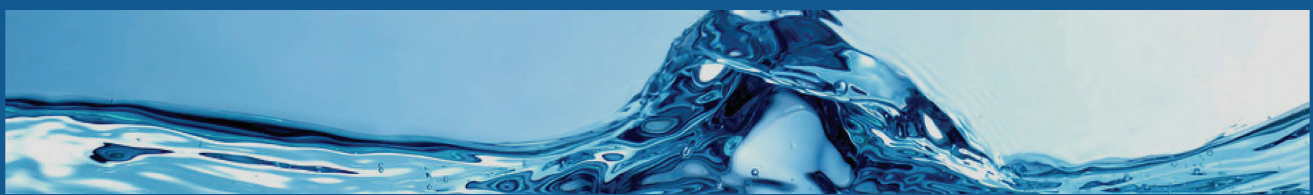
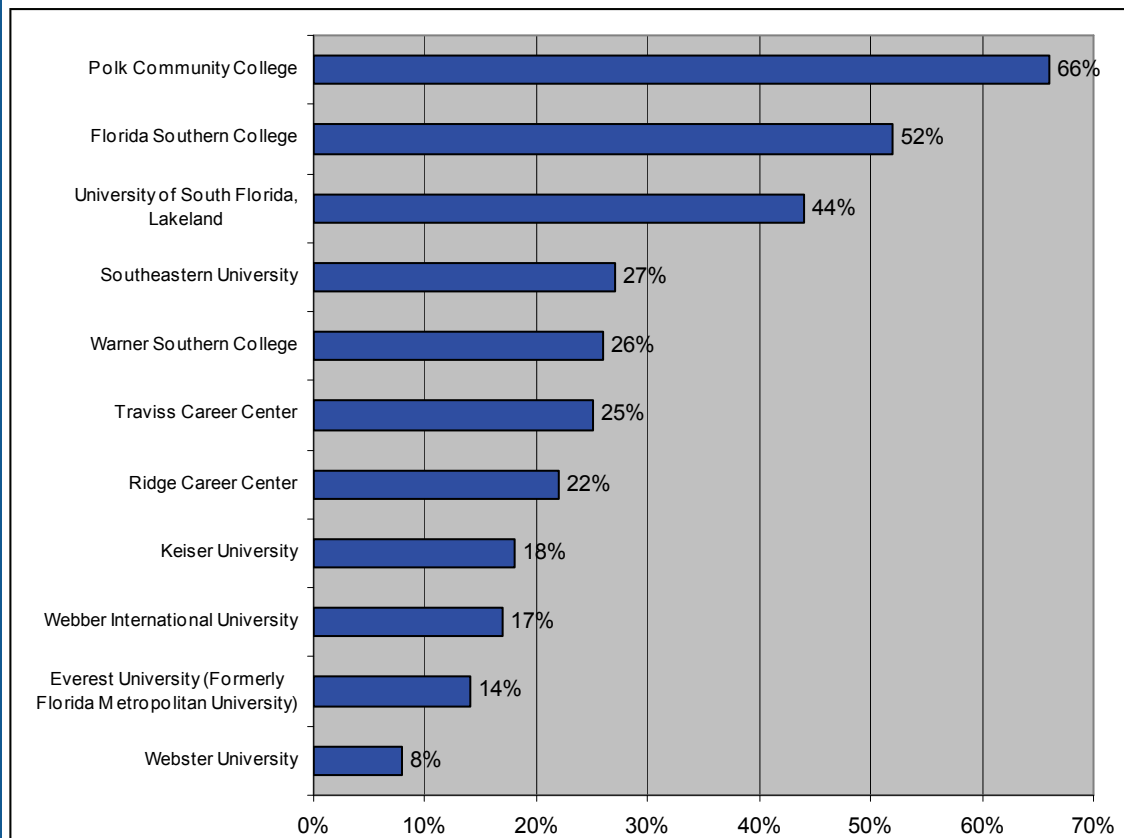


☑ TRAINING SUPPORT

How do employers support workers who pursue education & training?

- ◆ Employers frequently assist employees in pursuing training opportunities. Sixty-three percent (63%) offer tuition reimbursement and 62% of employers offer flexible paid time off.
- ◆ A smaller percentage (16%) offered employees release time from regular work hours to pursue training in their specific occupational fields.
- ◆ Approximately 51% of employers do not have a preference of when the employee attends classes. Over 69% of employers prefer that employee training take place on weekday evenings or weekends. A smaller number (21%) prefer employees take courses during the work day.
- ◆ While the majority of institutions that employees attended are local, nearly a dozen of the respondents indicated they have hired employees who also graduated from institutions outside of Polk County.

Percentage of companies that have employed graduates from local educational institutions



SURVEY PARTICIPATION

Overview of employers in the 2008 State of the Workforce Survey

- ◆ Across Polk County, over one-third (38%) of the companies have been in business between 6 to 25 years (see chart on following pages).
- ◆ Regarding the geographic distribution of respondents, the largest number of employers had site locations in Lakeland (approximately 37%) while other cities in Polk County have representation approximately proportionate with their respective size. (see chart on following page).
- ◆ Of the respondents, the top three industries across the county included manufacturing, health care, and social services, with government and professional and technical services tying for fourth.
- ◆ Approximately 16% of respondents were categorized as “other,” and they included non-profit organizations and staffing services. Less than 1% of the respondents did not indicate their type of industry.
- ◆ The larger percentage of employers (19%) responding to the survey had between 101 to 250 employees, though 45% of all respondents had between 1 to 50 employees.
- ◆ Of the companies that responded, 68% had locations only in Polk County while 32% had additional locations outside of Polk County. Survey reflects employment and labor statistics only for locations in Polk County.
- ◆ Eighty percent (80%) of respondents had a human resource department or position, while 20% of respondents did not.
- ◆ Of the 20% that did not have a human resource department or position, 91% do not outsource the recruitment function, while 9% of respondents do.

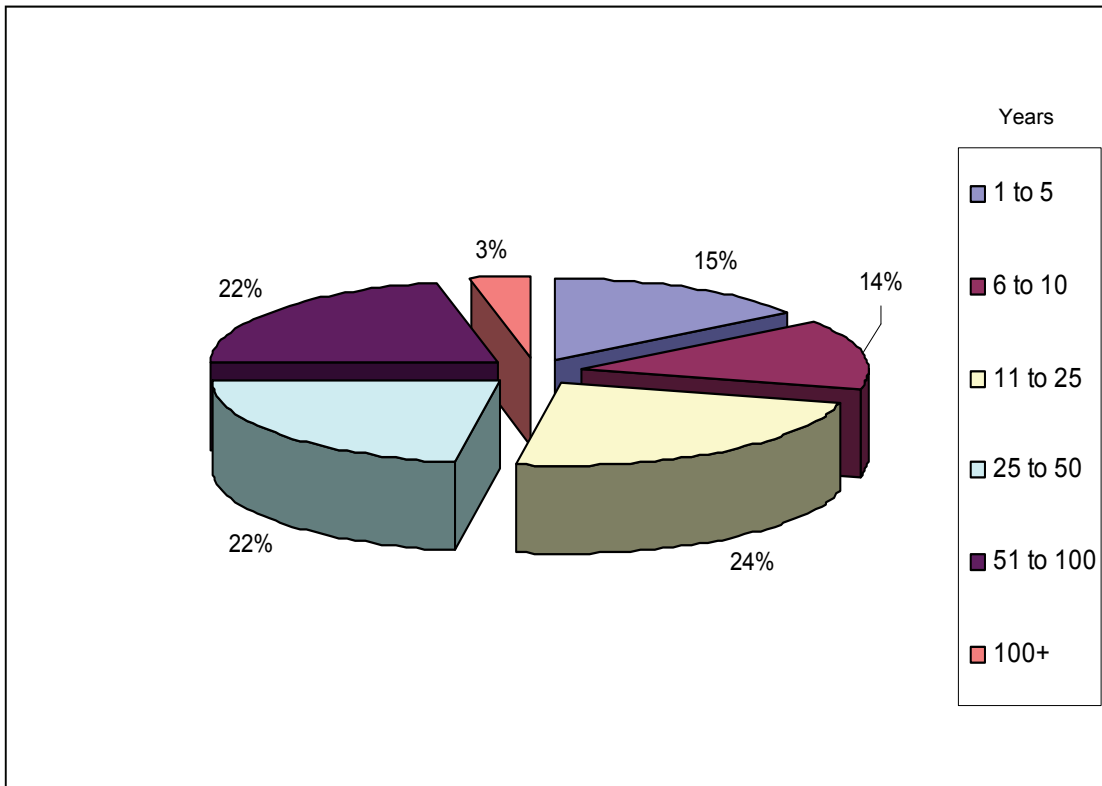


SURVEY DETAILS

SURVEY PARTICIPATION

Overview of employers in the 2008 State of the Workforce survey

NUMBER OF YEARS BUSINESS HAS BEEN LOCATED IN POLK COUNTY

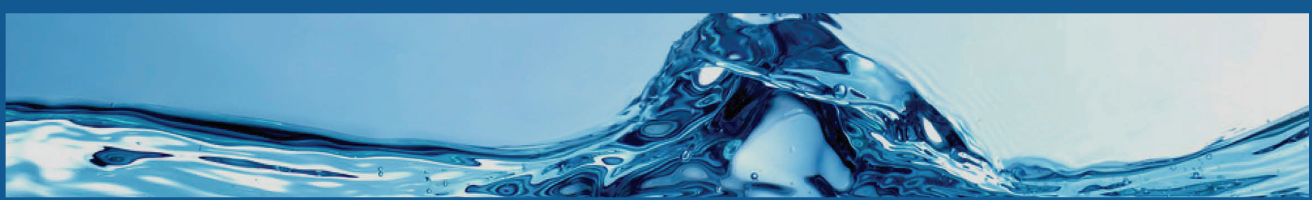
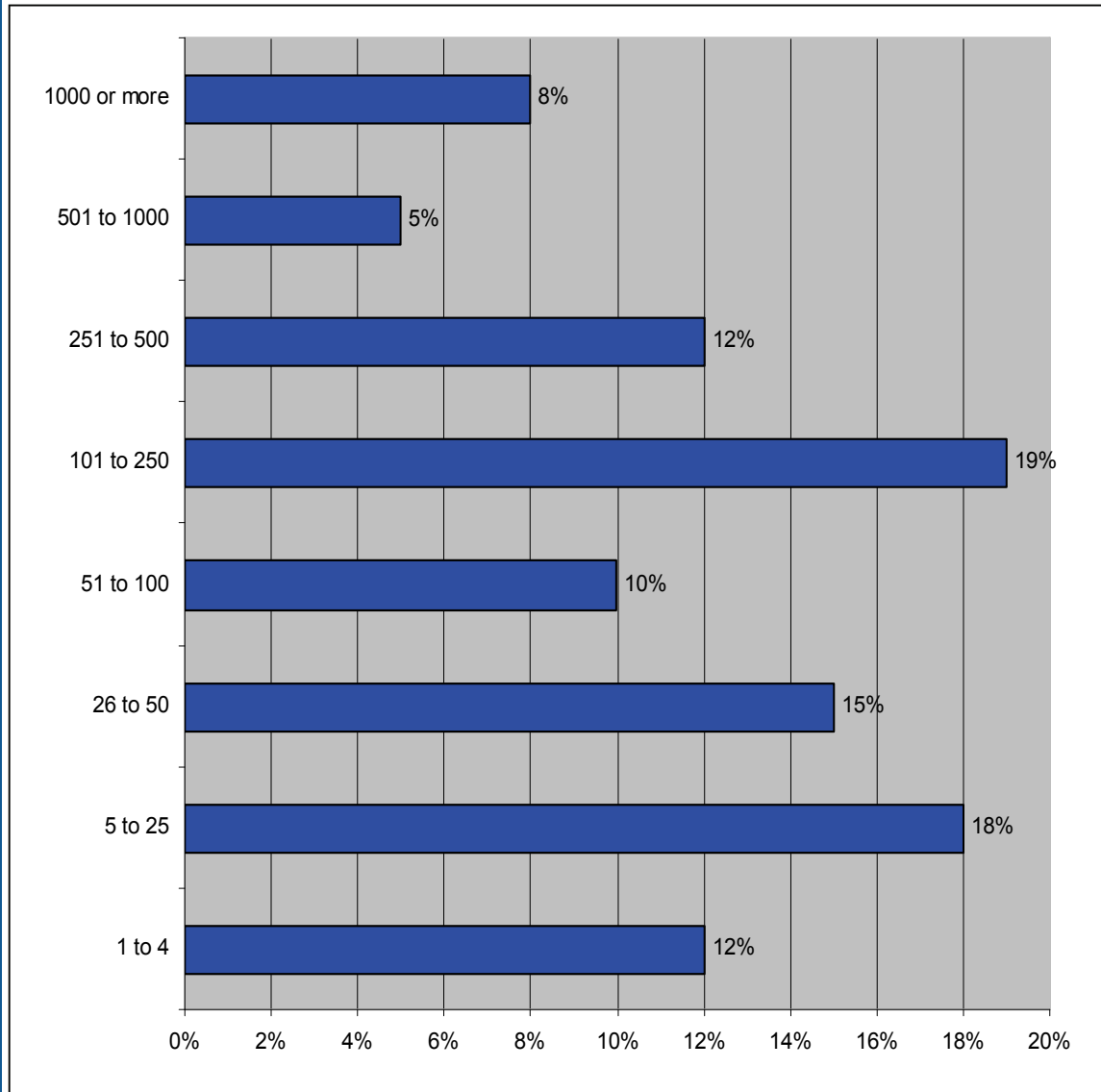


SURVEY DETAILS

SURVEY PARTICIPATION

Overview of employers in the 2008 State of the Workforce survey

SURVEY OF PARTICIPANTS BY SIZE (# OF EMPLOYEES)

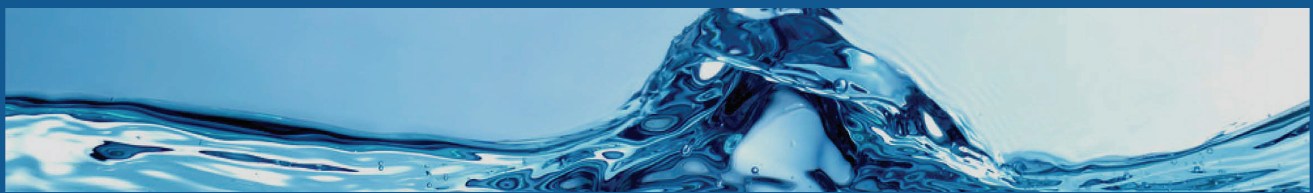
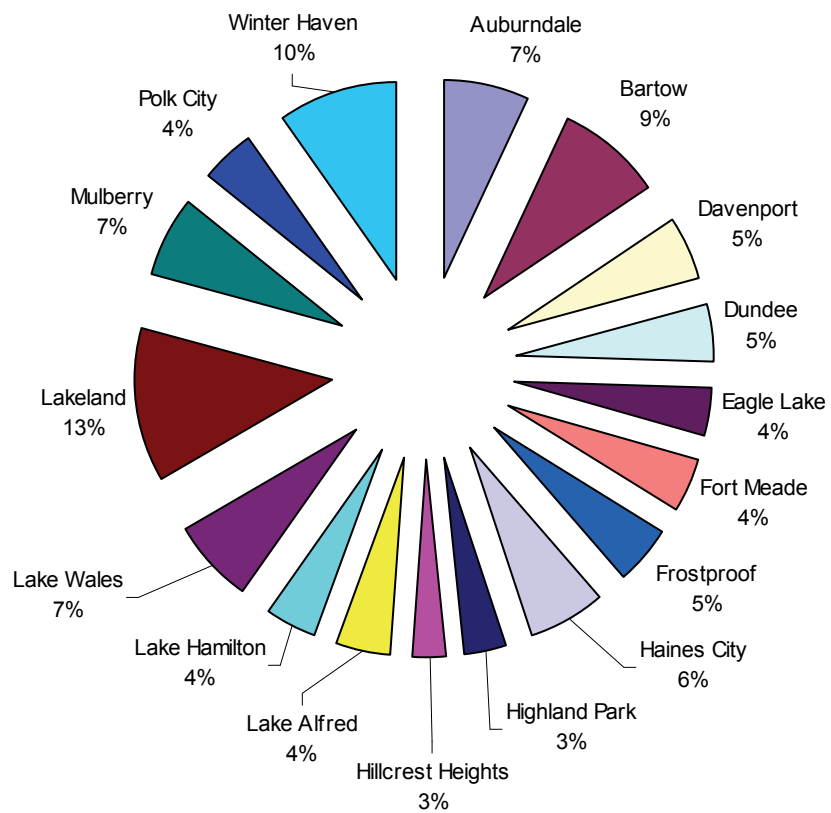


SURVEY DETAILS

SURVEY PARTICIPATION

Overview of employers in the 2008 State of the Workforce survey

SURVEY PARTICIPANTS BY SITE LOCATION (MUNICIPALITIES)

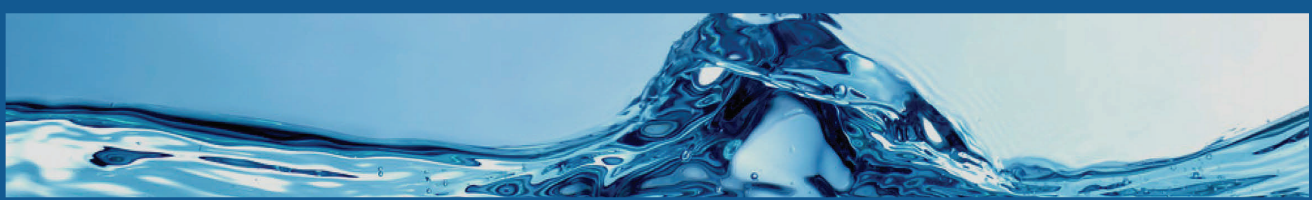
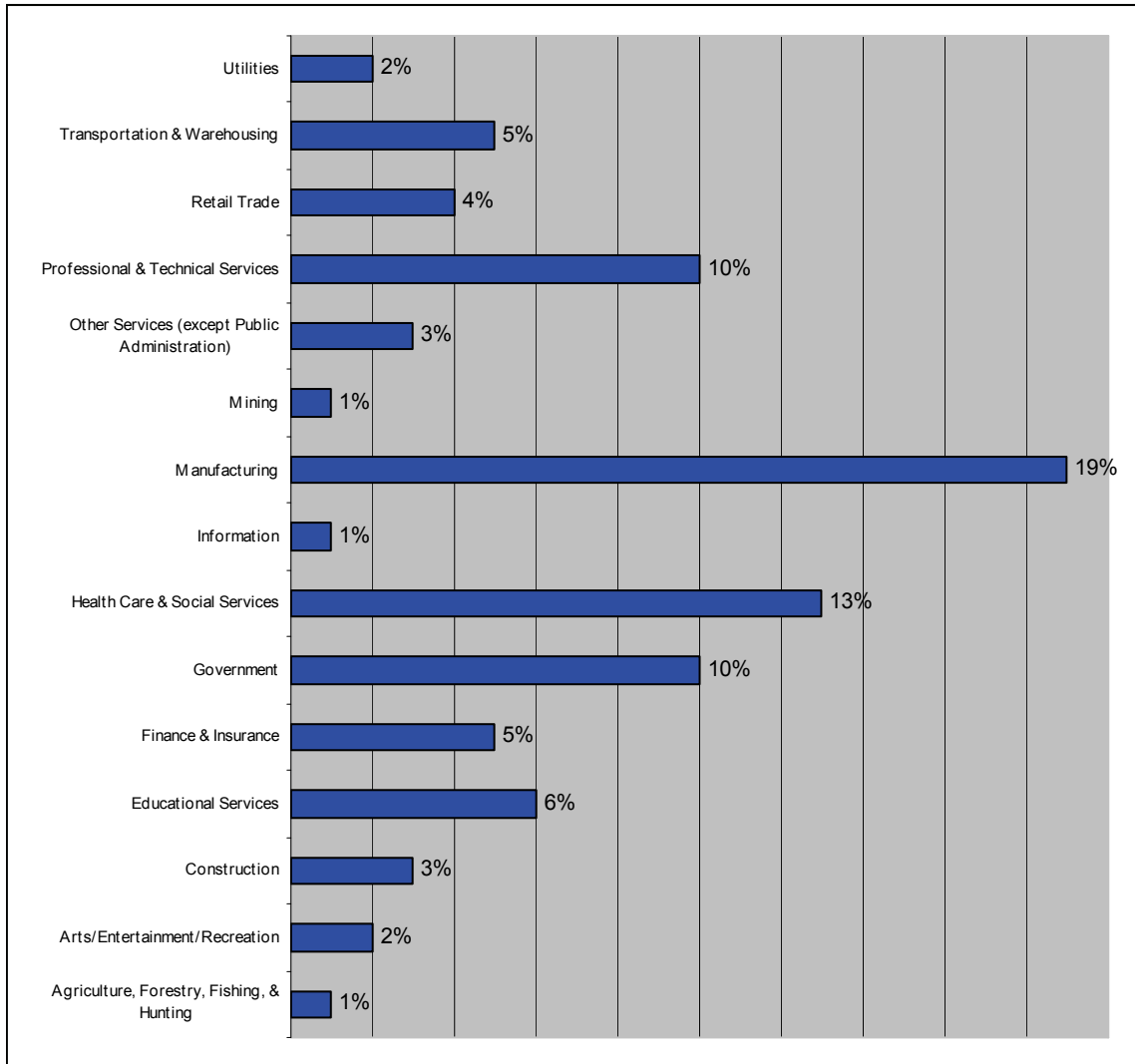


SURVEY DETAILS

SURVEY PARTICIPATION

Overview of employers in the 2008 State of the Workforce survey

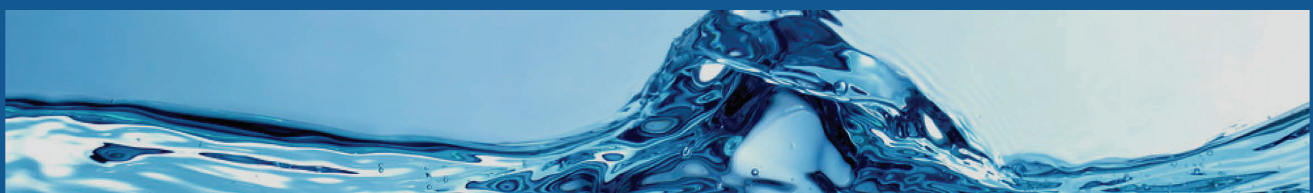
SURVEY PARTICIPANTS BY INDUSTRY



SURVEY DETAILS

SURVEY METHODOLOGY

- ◆ The 2008 Employer Survey was conducted in April through May 2008, targeting 500 employers in Polk County and ultimately yielding 165 valid responses, or a 33% response rate. The survey was administered via an open-invitation online survey. Employers were invited to participate via mass e-mail distributions through partners of Polk Works. This mechanism yielded 100% of the total responses.
- ◆ To ascertain the validity of the survey, it was required to review the partial responses and those surveys completed in two sessions. It was determined that any employer completing at least 50% of the survey items would be included within the analyzed sample.
- ◆ In some instances, employers answered all questions of the survey that were relevant to their business, while some portion of the survey items were deemed inapplicable to their business.



SURVEY DETAILS

◇ DATA SOURCES

- ◆ US Census Bureau, 2000 Census Counts
- ◆ US Census Bureau, 2006 American Community Survey, Data Profile highlights by county
- ◆ US Department of Labor, Bureau of Labor Statistics
- ◆ State of Florida Agency for Workforce Innovation
 - Labor Market Statistics
 - LEHD State and Metro Reports
- ◆ Individual Polk County city and chamber of commerce web sites
- ◆ Central Florida Development Council
- ◆ Claritas MarketPlace
- ◆ Career OneStop
- ◆ Enterprise Florida, County Profile Reports
- ◆ Office of Economic and Demographic Research
- ◆ America's Career InfoNet
- ◆ Florida's Research & Economic Database
- ◆ Wikipedia



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