

GULF COAST WORKFORCE BOARD

WORKFORCE

REPORT CARD 2015



A MEASURE OF PROGRESS comparing the Gulf Coast's economy and labor market against those of similar metropolitan regions in the United States

2015 Report Card

	Macroeconomy & Industry Dynamics	Employment & Unemployment	Labor Force Composition	Income, Wealth & Poverty	Quality of Life	Educational Achievement & Investment
GULF COAST	A	A	B	B	B	C
ATLANTA	C	C	B	B	B	A
DALLAS	B	A	B	B	B	B
DENVER	B	A	A	A	B	A
MIAMI	C	B	B	C	C	C
SAN ANTONIO	A	B	B	B	B	B
SAN DIEGO	B	B	B	B	B	A

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In February 2005, the Gulf Coast Workforce Board produced the first Report Card as a tool to gauge the region's competitiveness in relation to similar metropolitan areas across the United States. Since then, the Board has produced four subsequent updates. This 2015 Workforce Report Card is the fifth update.

We again use the following metro areas as comparison regions:

- Atlanta
- Dallas
- Denver
- Miami
- San Antonio
- San Diego

As with previous editions, the Report Card examines several indicator measures that contribute to the overall prosperity of a region. The indicators are used to formulate these key dimensions:

- Macroeconomy and industry dynamics
- Employment and unemployment
- Labor force composition
- Income, wealth and poverty
- Quality of life
- Educational achievement and investment

For the 2015 Workforce Report Card, the Gulf Coast Region ranks:

- At the top in terms of the overall economic performance (industry and job growth)
- Toward the middle on labor force composition and quality of life
- Toward the bottom on educational achievement

While the Gulf Coast region performs reasonably well, education remains the critical issue for our region. Consistent with prior years, the Gulf Coast continued to score poorly on nearly all education measures. To emphasize the priority of education, this 2015 Report Card will begin with an examination of the education spectrum in the Gulf Coast region. This report will also present recommendations to positively impact the talent pipeline along with actions the Board has taken to support the education system. The second half of the report contains the full regional comparison.

IMPROVING THE GRADE



Consistently, the Gulf Coast region has ranked at or above average on nearly all key performance indicators. In the area of education, however, the region continues to need improvement.

- The Gulf Coast region's averaged graduation rate* for high school freshman is 73.7%—placing below the national average and four of the comparison metro areas.
- 82% of Gulf Coast region residents over the age of 25 have at least a high school diploma or GED—lower than the national average and all other comparison metro areas.
- The Gulf Coast region also lags behind other metro areas in residents with two-year degrees.

The Talent Pipeline

Education and training for children does not begin when they enroll in kindergarten, and it does not end when they graduate from high school. To produce the skilled workers that the region needs to remain competitive, our community should explore, implement and evaluate initiatives that will improve the quality of education and increase support for student success at every level, from early childhood to post-secondary.

*Historically, we have used the **Averaged Freshman Graduation Rate (AFGR)** as an indicator of high school achievement. However, AFGR data has not been updated since 2009 for metropolitan areas and school districts. In this edition of the Report Card, we will introduce the **Adjusted Cohort Graduation Rate (ACGR)**. Technical documentation by the National Center for Education Statistics indicates that the ACGR is the more accurate of the two indicators. (See NCES Appendix B: Detailed Methodology for Calculation of Four-Year On-Time Graduation Rates and Event Dropout Rates.)

- According to the World Health Organization, **early childhood** is considered to be the most important developmental phase in an individual's life. Healthy early child development, which includes the physical, social/emotional and language/cognitive domains of development, strongly influences a person's intellectual and physical abilities and quality of life well into adulthood. What happens to the child in the early years is critical for the child's developmental trajectory and life course.
- Quality investments into the public school system, and every child, help ensure steady progress through **elementary and middle school**, ultimately building to a successful and timely completion of high school. Key benchmarks serve as vital indicators of a student's success, such as fourth grade reading levels, middle school math and high school graduation.
- The greatest opportunity for significant gains in lifetime earnings and employment results from **post-secondary education**. Thus, the transition from high school graduation to post-secondary enrollment is one of the most critical stages. However, a substantially high percentage of Gulf Coast residents do not make this transition successfully.
- The Gulf Coast region ranks higher than the nation and other comparable metropolitan areas in the percentage of the population, age 18 and over, without a high school diploma. The implications this statistic has on the present and future workforce are severe. The Board has, therefore, made **adult education and literacy** a priority for the region to address the substantial number of adults without a high school diploma or vocational skills training.

Education is an important and vital component of the region's strategy to provide a skilled and educated workforce. The Board believes that by advocating solid and sound investments at every step along the way, the region will reap considerable dividends in the form of an educated and skilled workforce.



The Gulf Coast region boasts one of the most robust educational systems in the state and in the nation. The region is home to four of the largest school districts in the state: Houston, Cypress-Fairbanks, Fort Bend and Aldine. Based on recent Texas Education Agency (TEA) statistics, the 13-county Gulf Coast region has nearly 4,200 active, early education providers, 77 independent school districts, 10 community college systems, nine universities and six specialty university-based health and bioscience programs.

Early Childhood and Pre-K

Studies show that 90% of a child's brain develops in the first five years of life. It is necessary that the region give careful attention and adequate resources to begin preparing children at an early age for school and beyond.

Pre-K and Head Start programs are designed to promote school readiness of children from birth to age five among low-income families. Based on US Census 2012–2013 data, Texas had nearly 800,000 Pre-K-aged children, approximately 28% of whom were actually enrolled in a Pre-K program representing one of the largest programs in the nation. On average, Texas invests \$3,366 per child for 3-year-olds and 4-year-olds in the Pre-K programs, less than California and Georgia.

Local efforts aim to increase investments in early education. **Early Matters** is a broad-based coalition of business, civic, education, philanthropic and nonprofit organizations and volunteers, working together to raise awareness about the importance of high-quality early education and to make a strong case for increased investment in early education. In a recent publication by the Early Matters Coalition titled *Reframing Early Education: The Critical Case for Change*, as many as 60% of Harris County students entered the 2012–2013 school year lacking requisite reading-readiness skills. According

to the report, a majority of young children now have working parents who need to involve other adults in the care of their young children, and many children are in the care of adults who do not have the background or training needed to support their learning and development. Early Matters notes that 60% of kindergarteners cannot identify letters, 62% cannot count, 78% do not know their numbers and 59% cannot write their name.

Studies have shown that children who lack basic educational competencies have a higher propensity to drop out before completing secondary school.



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Employers need educated workers with technical and workplace skills; such learning begins with high-quality early childhood care.



Elementary and Middle School

Fourth grade reading proficiency is a significant indicator of a student's success and progress toward high school completion. Annie E. Casey Foundation asserts in its *Early Warning! Report* that "Up until the end of third grade, most children are learning to read. Beginning in fourth grade, however, they are reading to learn, using their skills to gain more information in subjects such as math and science, to solve problems, to think critically about what they are learning and to act upon and share that knowledge in the world around them." In addition, if students are not reading on grade level by 4th grade, they are more likely to drop out of school. In 2013, only 52% of students in 4th grade in HISD were reading at or above their grade level, which means that nearly half of the 4th graders in the district are unprepared to perform successfully beyond elementary school. The disparity increases for 4th graders with disabilities.

In middle school, student performance in math, particularly algebra, demonstrates readiness for more advanced mathematics in high school and beyond. However, only 72% of 8th graders and 18% of 8th graders with disabilities in the Houston Independent School District were performing at or above grade level in math, scoring lower on both figures than the state and nation.

The ability to read, compute and develop cognitive skills is critical to a child's success in school, life-long earning potential and their ability to contribute to the nation's economy and its security.

National Assessment of Educational Progress 2013

Category of Student	Area	4th Grade (At or Above Basic)			8th Grade (At or Above Basic)		
		Math	Reading	Science*	Math	Reading	Science*^
All Students	Houston ISD	80%	52%	55%	72%	63%	49%
	Texas	84%	63%	70%	80%	76%	67%^
	U.S. Public Schools	82%	67%	71%	73%	77%	64%^
Students with Disabilities, Including 504 Plan Individualized Education Programs	Houston ISD	39%	13%	24%	18%	14%	10%
	Texas	55%	28%	51%	38%	34%	29%^
	U.S. Public Schools	55%	31%	50%	34%	38%	34%^

*All science achievement figures refer to 2009 data unless otherwise noted.

^ Refers to 2011 data.

Source: National Center for Education Statistics

HOUSE BILL 5

In 2013, the 83rd Texas Legislation passed House Bill 5 (HB 5). HB 5 made substantial changes to the state's curriculum and graduation requirements, assessment program and accountability system. Notably, the legislation established endorsements — or “career tracks” — in five categories:

- STEM (science, technology, engineering and math)
- Business and Industry
- Public Service
- Arts and Humanities
- Multidisciplinary

These endorsements aim to create a well-balanced high school curriculum that serves both academic and industry needs.

HB 5 mandates that rising ninth grade students must choose an endorsement track to pursue during their high school years. However, the current public education infrastructure does not support robust middle school career exploration that informs quality decision making. Students would be better prepared to make endorsement choices if they could see how core class knowledge is applicable to work skills.

Simply put, students and parents need access to:

- Quality career information early in the middle school years
- Trained counselors with time to help parents and students evaluate career and education options
- Learning experiences that connect classroom academics to career opportunities

High School

Adolescence, the period between 11 and 19 years of age, is a critical transition in a child's lifespan and is characterized by a tremendous pace in growth physically, mentally and emotionally. There are key developments during this period such as puberty, social independence and the ability to form abstract reasoning. At this critical life stage, young people are also challenged to begin making career choices. High school graduation is an essential milestone on the path to a good career. Yet, too many students fail to complete high school.

Historically, stakeholders have looked at graduation rates* and dropout rates independently. However, that view failed to offer a complete picture of the student progress for the traditional four-year high school period. **The adjusted cohort graduation rate (ACGR)** accounts for students who graduate, stay in high school, obtain a GED or drop out of school altogether.

*See footnote on page 2



The ACGR is based on the number of students who graduate in four years or less with a regular high school diploma divided by the number of students who form the adjusted cohort for the graduating class. Starting with the 2011–2012 school year, states are required to include the ACGR as part of their Consolidated State Performance Reports. Given that reporting of this indicator by state education agencies is now a standardized federal requirement, data over time is more comparable than in the past.



In the 2012–2013 school year, the more than 3,200 Texas public high schools had a collective ACGR of 88%. Among the 13 counties of the Gulf Coast region, the highest adjusted cohort graduation rates were recorded in Chambers County (97.9%) followed by Wharton and Waller, both at 96.2%. The two counties with the lowest graduation rates, Harris and Walker at 85.9% and 76.9, respectively, were also the only two to fall below the state average.

The table below uses the ACGR to illustrate the rates for the 10 largest districts in the Gulf Coast region.

Gulf Coast Region High School Completion Rates 10 Largest Districts, 2009-2013 Cohort

District Name	Total Students in 4-Year Cohort	Graduation Rate	Continuation Rate	GED Rate	Dropout Rate
Texas	328,584	88.0	4.6	0.8	6.6
Aldine ISD	3,828	78.0	5.3	0.5	16.3
Alief ISD	2,656	93.1	1.8	0.2	4.8
Clear Creek ISD	2,839	95.9	2.1	0.3	1.7
Conroe ISD	3,550	91.7	3.2	1.0	4.1
Cypress-Fairbanks ISD	7,381	90.5	4.4	0.5	4.7
Fort Bend ISD	5,350	91.6	3.5	0.5	4.4
Houston ISD	11,524	78.6	8.4	0.6	12.4
Katy ISD	4,473	92.7	3.4	0.6	3.3
Klein ISD	3,317	89.1	5.8	0.5	4.6
Pasadena ISD	3,347	85.8	4.8	1.3	8.0

Source: Texas Education Agency

Note: Graduation, Continuation, GED and Dropout rates may not sum to 100% due to rounding.

Correction: An earlier version of this table omitted Conroe ISD



CAREER AND TECHNICAL EDUCATION

As the successor to traditional vocational programs from years past, career and technical education (CTE) can provide students with an alternative pathway to gain employment by providing them with the technical knowledge and practical skills necessary to be successful in a world with rapidly changing technologies and industries. Aimed at high school/secondary students and, to a lesser extent, postsecondary students, enrollment in CTE has varied over time, sometimes significantly at both the state and national levels. Overall, the U.S. experienced a 3.7 percent decline in CTE enrollment among high school students, which contrasted with a 2.2-percent gain among their postsecondary counterparts between academic years 2007-2008 and 2011-2012. Texas saw moderate yet similar growth in both categories, up 10.2 percent and 10.7 percent, respectively, over this same period.

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CTE programs benefit both students and employers by allowing young people to gain valuable skills that lead to industry credentials and in-demand jobs.

MAXIMIZING STUDENT TIME IN THE HIGH SCHOOL CLASSROOM

With an increasing need to address the skills gap with earlier and more effective interventions, many opportunities exist to layer value of time on task in the secondary classroom. Contextualized courses teach occupational skills within the academic framework of a core class and vice versa. Flipped classrooms focus on activity-driven lessons during class time while passive learning (listening to online lectures, for example) is completed at home. Advanced placement and dual credit classes allow students to learn advanced knowledge and earn college credit to accelerate progress along a career pathway. A contextualized dual credit class taught through an active-learning model presents multiple advantages for the student and his/her career knowledge, skills and abilities.

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By offering two or more of these models at a time to students, high schools will increase the value of time spent in each class, which will accelerate students' progress toward high school completion, create opportunities to attain college credits sooner and inform career pathway decisions.

Post Secondary Education

Following high school graduation and post-secondary enrollment, the next critical phase of the talent pipeline is college success and completion. Along with the first-rate universities located in the Gulf Coast region, community colleges are key partners in the regional workforce system. They provide a variety of services to students at affordable rates, including:

- Associate’s degrees
- Workforce certificates
- Dual credit for high school students
- Adult basic education
- Continuing education and personal enrichment

The Gulf Coast region is home to 10 community colleges, including nine members of the Gulf Coast Consortium of Community Colleges, plus satellite locations for Blinn College. Each year, these community colleges together serve more than 300,000 students in credit and non-credit courses. Unfortunately, a significant portion of students who enter college never graduate; African American and Latino students have even lower completion rates than the student population at large. These figures are especially bleak when considered with the diverse composition of our workforce. In 2013, African Americans and Latinos together accounted for 51% of the Gulf Coast labor force. Fortunately, educational institutions recognize this issue and are actively working to improve graduation rates.

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We must continue to encourage successful completion of post-secondary education, particularly among students of color, to ensure a trained and educated workforce in our region.

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Area Community Colleges	
Alvin Community College	Houston Community College
Blinn College	Lee College
Brazosport College	Lone Star College
College of the Mainland	San Jacinto College
Galveston College	Wharton County Junior College

Area Universities	
Houston Baptist University	University of Houston System • University of Houston • UH Clear Lake • UH Downtown
Prairie View A&M University	
Rice University	
Sam Houston State University	
Texas Southern University	University of St. Thomas

Health Care and Biosciences Universities	
Baylor College of Medicine	The University of Texas Health Science Center at Houston
Texas A&M University Health Science Center Institute of Biosciences and Technology	The University of Texas Medical Branch at Galveston
Texas Woman’s University Institute of Health Sciences – Houston Center	The University of Texas M.D. Anderson Cancer Center



UNIVERSITY HIGHLIGHTS

The University of Houston (UH) is one of the largest universities in the Gulf Coast region and one of only three Carnegie-designated Tier One public research universities in Texas. UH is also only one of three Tier One public research institutions in the nation designated as a Hispanic-Serving Institution by the U.S. Department of Education and was ranked as the second most racially/ethnically diverse university in the nation.

The Gulf Coast region is also home to one of the nation's largest historically black universities, Texas Southern University (TSU). TSU graduates 27% of all African American pharmacists in the U.S. Rice University is our largest private university and consistently performs well in various national rankings.

Adult Education and Literacy

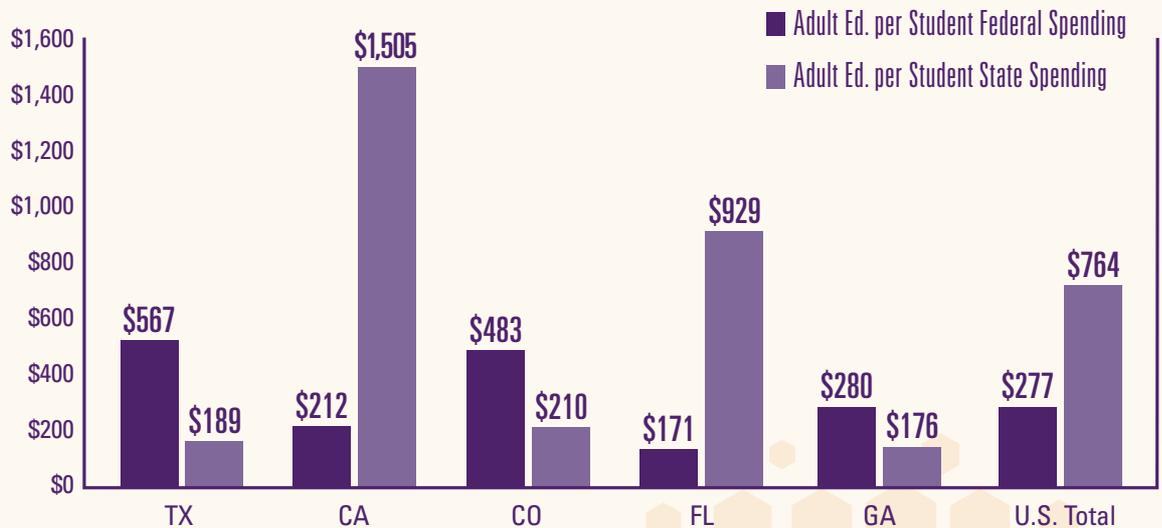
Adult education helps individuals gain basic skills needed to be productive members of society. Traditionally, courses have focused on basic reading, writing, math, English competency and problem-solving skills. However, in 2013, when Texas House Bill 362 transferred adult education and literacy (AEL) programs from the Texas Education Agency to the Texas Workforce Commission, the goal for AEL shifted to support increases in employment, higher education transition, skills gains and secondary education completion for participants through demonstrated program models that successfully integrate system services and leverage community partnerships. One such model is Accelerate Texas.

Since 2010, the Texas Higher Education Coordinating Board and Texas Workforce Commission have partnered to develop and support Accelerate Texas projects across the state in order to increase participation and success of AEL students at public two-year institutions in workforce training programs that lead to credentials of value in their regional labor market. Accelerate Texas projects combine contextualized AEL instruction—contextualized curriculum helps students learn basic skills by teaching the skills using the authentic contexts in which students must use those skills in the real world—with career and technical education, bridge or transitions instruction, career and advising services and employment and supportive services that result in credentials, certificates or industry-recognized certifications that are important to local and regional economies. Furthermore, they allow students to advance along a clearly defined career pathway to higher levels of education and employment.





State and Federal per Student Spending: Adult Education – 2010



Note: Includes adult basic, adult secondary and English as a second language education.

Source: U.S. Department of Education – Office of Career, Technical and Adult Education – National Reporting System via the Federal Education Budget Project – <http://febp.newamerica.net/>

Statewide, an average of \$189 is spent per student in adult education; federal spending is \$567 per adult. As expected, per student cost increases significantly for Accelerate Texas participants. To achieve substantive gains in adult education, funding must be increased to serve more than the current 3% of adults who need these services and to support the creation and successful implementation of more Accelerate Texas projects and other career pathways initiatives.

WORK-BASED LEARNING

In addition to traditional learning, the Gulf Coast Workforce Board encourages local employers to participate in Registered Apprenticeship Programs which sponsor a developed set of structured standards that include requirements for related classroom instruction and paid on-the-job training with appropriate supervision. At the successful completion of both the classroom and on-the-job components, apprentices receive an industry-issued, nationally recognized portable certificate of completion.

Apprenticeship programs provide employers with:

- Customized training that results in highly skilled employees trained to industry/employer specifications
- Increased productivity and knowledge transfer due to on-the-job learning from an assigned mentor combined with related technical instruction
- Enhanced retention – 87 percent of those who completed the program in 2011 were still employed nine months after completing their apprenticeship

Apprenticeships have the potential to help bridge the workforce skill-gap hampering the nation's long-term prospects. To report status of apprenticeship programs, the Department of Labor collects data on several measures by state. Between FY 2011 and FY 2014, apprenticeships in Texas generally showed increases. The exception is a decrease in New Apprenticeship Programs, which fell by 13 percent.

Registered Apprenticeship Results		
Percent Change FY 2011 - FY 2014	Texas	United States
Active Apprentices	7.2%	22.0%
Active Apprenticeship Programs	5.2%	-22.9%
New Apprentices	24.6%	82.3%
New Apprenticeship Programs	-13.0%	15.2%
Apprenticeship Completers*	51.7%	-16.3%

Source: U.S. Department of Labor

* Data for FY 2011 not available.

Active Apprentices: Include registered (RE), suspended (SU), and reinstated (RI) apprentices.

Active Programs: Include registered (RE) and reinstated (RI) programs.

New Apprentices: Apprentices registered during the period (The begin date, not the registration date is used).

New Programs: Programs registered during the period.

Completers: Apprentices that have completed during the period.

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Increased awareness among employers of Registered Apprenticeship Programs and the associated benefits can provide another viable avenue to strengthen workforce education.

Conclusion

The Gulf Coast Workforce Board strives to create the best and strongest regional workforce in Texas. The Board is committed to building a global economy and cultivating the best minds to fuel tomorrow's workforce needs. The 2015 Report Card is an opportunity to review how we have progressed in our region and to address the growing educational needs of the regional workforce. By working together, we will continue to expand opportunities for employers, add better jobs with higher wages, recruit better talent and attract more businesses.

Recommendations

The data in this report reveals several significant gaps in our current education system that may have grave implications for our region's students and, ultimately, our future workforce and economy. However, the report also puts forth a challenge for administrators, educators, policymakers and other key stakeholders to explore and implement innovative solutions that will dramatically improve the entire academic pipeline, from cradle to career, at the regional and state level.

The Gulf Coast Workforce Board, therefore, offers the following recommendations for further consideration:



1 Increased support for quality Pre-K programs. Recruiting and retaining highly-skilled early childhood educators is critical to ensuring that our region's children are receiving the best education. In order to attract this caliber of teachers, the region must commit to offering higher compensation and better incentives for early childhood educators.

2 Additional remediation and intervention for primary school children not performing at grade level in reading and math. It is important that school and district leaders make collecting and analyzing data a priority so that teachers are equipped with timely and accurate data regarding their students' performance. This data will inform effective remediation and intervention strategies that will help educators put students back on track. Furthermore, the Board recommends that intervention and course correction occur as early as possible in a child's life to avoid extensive remediation later in life when it will be more difficult and costly to catch up.

3 Expand student and parent access to quality career information in middle-school. Increased opportunities for hands-on career exploration should be strategically integrated into existing middle school learning frameworks in a way that does not require additional coursework in an already strenuous curriculum. Furthermore, current labor market information and how it correlates with high school occupational endorsements should be made readily available to middle school students and their parents to better inform future career decisions.

4 Maximize high school students' time in the classroom through Dual Credit and Advanced Placement courses. The Board recommends increased opportunities for maximizing time in the classroom by layering advanced placement, dual credit, contextualized and active learning opportunities so that students receive quality, hands-on experiences that also advance their progress toward informed post-secondary and career decisions.

5 Increase per student spending for Adult Education and Literacy. Training adults is one of the region's most immediate solutions to meeting the needs of our current and future workforce; however, Texas currently ranks near the bottom for state spending on adult education. If the region expects to see any significant gains in this area, we must not only increase our investment in adult education programs, but we must make wise investments to identify and expand programs with proven results.

6 Promote apprenticeships for young adults and displaced workers. Apprenticeship programs have evolved into innovative work-based learning models with significant benefits for both employer and apprentice. Apprenticeships help employers recruit and develop a highly-skilled workforce and studies show that apprentices who complete their program earn considerably more in wages over their career than non-apprenticeship participants.



Our Commitment

The Gulf Coast Workforce Board is committed to helping employers meet their workforce needs and individuals build careers so both can compete in the global economy. With our operating affiliate Workforce Solutions, the Gulf Coast Workforce Board will:

- Continue to help employers throughout the region find skilled candidates for their job openings. We will also increase our focus on helping employers in the region's key industries find and develop talent for current and future job needs.
- Continue to improve customer service for individuals looking for work, especially individuals with disabilities.
- Continue to provide high-quality labor market information products and tools for employers and individuals, focusing on new and better career education for students, parents, teachers and counselors.
- Contribute to high-quality, life-long learning experiences by
 - Continuing our work to improve the quality of early education and care for young children;
 - Expanding the access to and availability of adult education and literacy instruction throughout the region;
 - Promoting and supporting work-based learning, including apprenticeship models.

To learn more about the vast array of services from Workforce Solutions, visit www.wrksolutions.com.


Workforce Solutions



REGIONAL COMPARISON INDICATORS

Since the Gulf Coast Workforce Board's 2011 Report Card, the 13-county Gulf Coast area and the nation have continued to recover from the Great Recession. The Gulf Coast region continues to create and retain good jobs resulting in some of the fastest population growth in recent memory as evidenced by the addition of nearly 400,000 jobs and over 430,000 residents. With the Great Recession now six years behind us, the region remains poised to continue its role as one of the nation's major regional economic engines.

Much of this progress is reflected in this year's Report Card, which continues the longstanding goal of benchmarking the region against similar metro areas across six key dimensions (Note that due to only slight differences in geography, the terms Gulf Coast region and Houston are used interchangeably throughout this report):

- Macroeconomy and industry dynamics
- Employment and unemployment
- Labor force composition
- Income, wealth and poverty
- Quality of life
- Educational achievement and investment

Continuing the tradition begun in the previous Report Card, we again include excerpts of various global rankings in order to place the Gulf Coast region and other U.S. cities in an international context. We feel this is important given the ever-accelerating exchange of human, financial and technological capital across borders. As before, these measures can be found in sidebars next to the most relevant sections where possible.



Macroeconomy and Industry Dynamics

Understanding the industrial make-up and growth trends of a region is critical to identifying the strengths, weaknesses and opportunities faced by businesses and workers alike. Ideally, the local economy will be composed of a wide range of industries and job types with high-skill, well-paying (knowledge-based) jobs serving as both an anchor for the overall labor market and as a catalyst for the creation of even more jobs. This is on top of the desire to see increasing numbers of businesses, rising employment and expanding economic activity over time.

Population growth is one of the most basic indicators of a region's economic well-being. On one hand a growing population signals that the region can meet the needs of current residents while also providing opportunities for newcomers. At the same time rapid growth can lead to strains on infrastructure and resources and magnify challenges such as crime and pollution. Among the comparison regions, all of which saw growth over the most recent five-year period, the fastest increase was in San Antonio, up 12% from 2008 to 2013, followed by the Gulf Coast region (10.7%) and Miami (7.6%). These increases in population however belie the slowing rate of growth across most areas since the previous Report Card. Two regions, Miami and San Diego saw their rates of growth increase from the previous five-year period of 2004 to 2009. Atlanta saw the largest decline over the two, five-year periods while the Gulf Coast saw the second-least amount of change indicating a relatively constant rate of population expansion.

As of 2013, the most recent year for which most of the data in this Report Card were available, all metropolitan areas saw a return to economic growth after the Great Recession, although rates varied widely. Capturing this increase is **metropolitan gross domestic product (GDP)**, which measures the market value of all final goods and services produced within a metropolitan area. The five-year growth rates for all three Texas metropolitan areas were the highest of the seven comparison areas with the Gulf Coast posting the fastest increase of all at 24%.

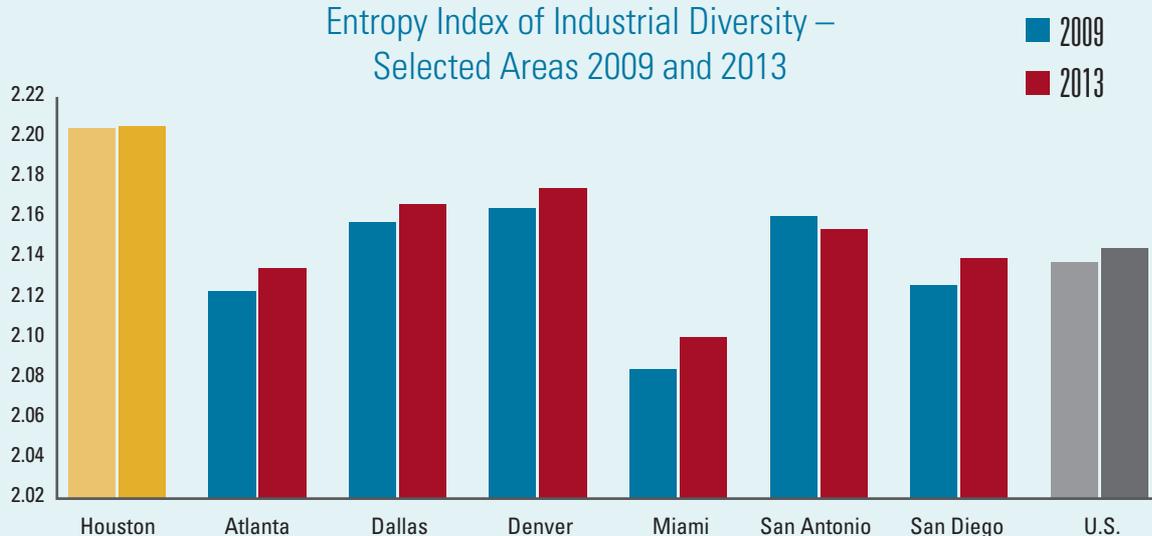
Growth in business establishments also varied across areas. Surprisingly, this did not always correlate with job and GDP growth as evidenced by Denver in particular. Ultimately, all three Texas metropolitan areas lead by the Gulf Coast region saw positive growth rates in business establishments over the five-year period in contrast to the remaining areas and the U.S.

Industrial diversity attempts to measure a local economy's resilience in the event of a downturn in one of its key industries. One widely recognized approach known as an **entropy index** measures how evenly employment is spread across industries for a chosen area.

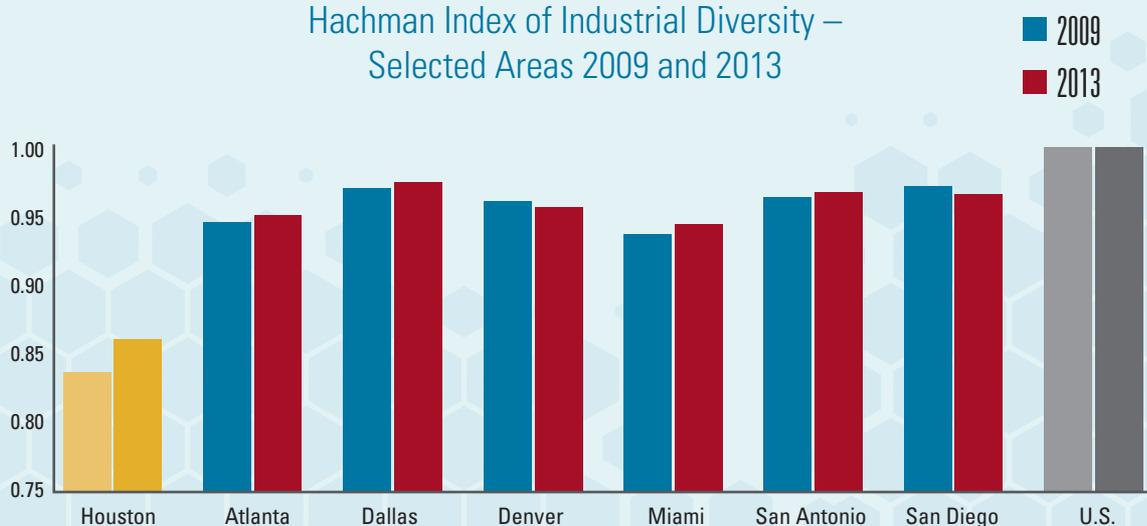


Another known as the **Hachman Index** determines local area similarity to the national mix of industries, which presupposes that the national composition represents the ideal level of diversification. On the first measure, the Gulf Coast region demonstrated the most evenly distributed employment across industries of the 25-largest metropolitan areas in the country. However, when benchmarking our region's industrial composition to the nation, Houston was the most dissimilar, i.e., least industrially diverse area of this same group. In short, jobs in the Gulf Coast region were evenly spread across the local mix of industries yet this mix of industries differed heavily from the U.S. profile. Unfortunately, neither measure of industrial diversity can account for situations when an area relies heavily on a single industry such as oil and gas that has high multiplier effect. It has been estimated that one energy job generates four other jobs ranging from professional occupations to entry-level service positions. Given the limitations of these indices, industrial diversity is included for informational purposes only.

Entropy Index of Industrial Diversity –
Selected Areas 2009 and 2013



Hachman Index of Industrial Diversity –
Selected Areas 2009 and 2013



Employment and Unemployment

When assessing an area's labor market, the mix of high-skill jobs, relative involvement of working-age people in the labor force, age of the workforce and the diversity of its participants are all important indicators of economic competitiveness.

The **rate of job growth** between 2008 and 2013 varied even more widely than metropolitan GDP. Once again, the Gulf Coast region had the fastest growth at just over 7% followed by San Antonio and Dallas. However Atlanta, Miami, San Diego and the U.S. saw flat to slightly negative growth over this same period.

Since the end of the recession in mid-2009, **unemployment rates** have continued to fall across much of the nation as the recovery gains momentum. As of 2013, Texas metro areas had the lowest unemployment rates of this cohort of cities, lead by San Antonio at 6% and followed by Houston and Dallas tying for second-place with 6.2%. With the exception of Denver, the remaining areas all had unemployment rates greater than or equal to the nation.

Related to the concept of unemployment is the proportion of individuals **not in the labor force**, which measures the adult working age population that is "unattached" to the labor force—meaning they are neither working nor looking for work. Expressed as a percentage of the total civilian population, this indicator is the converse of the more commonly known participation rate. Since the last Report Card, the percentage of the population not in the labor force rose across all comparison areas and the U.S. The Gulf Coast region saw a relatively modest increase from the previous Report Card to 33% while still remaining below the national average of 36%. Atlanta saw the largest increase between 2009 and 2013 and Miami had the largest percentage of the civilian population not in the labor force. Despite significant improvements to the overall economy since the end of the recession, these increases indicate that many individuals remain discouraged about their job prospects and therefore choose to not seek employment.



Labor Force Composition

The percentage of **managerial, professional and related jobs** serves as a proxy for the share of high-skill "knowledge jobs" in a region's economy. These jobs are key to providing value-added goods and services and spurring innovation. The Houston area had a higher-than-average share of these jobs relative to the other Texas metropolitan areas and the U.S. However, Denver, San Diego and Atlanta had the highest concentrations of these jobs.

The **Simpson Index of Diversity** measures the likelihood that two individuals of a population will be from different racial or ethnic groups. This measure increased slightly across all regions, led by Atlanta.

However, the Gulf Coast remains the most diverse area followed by Miami with Dallas and San Diego tying for third. These four regions also had the highest **percentage of foreign-born individuals**. Miami ranked highest with nearly 39% of its population born outside of the United States followed by San Diego (24%) and the Gulf Coast (23%). Dallas and Denver saw slight decreases in the percentage of foreign-born individuals compared to the previous Report Card.

As a proxy for the pipeline of future talent, the **balance between entering and exiting** indicator measures the balance of 15-to 24-year olds to 55-to 64-year-olds in a population. The former age group is presumed to be entering or already participating in the workforce while the latter group is presumed to consist of late-career individuals or those already in retirement. Positive values indicate a labor force with a growing proportion of younger workers, which should reduce the likelihood of future talent shortages. This trend was demonstrated by all areas with the youngest skewing workforce in San Antonio and the oldest in Miami. The Houston-area came in fourth. Miami's older-skewing workforce was reflected in its **median age**, the highest among the comparison regions at 40.4 years. Rather than San Antonio, the Gulf Coast region had the lowest median age at 33.6 years. Since the last Report Card San Antonio, San Diego, Houston and Miami saw all their balances rise indicating increasingly younger workforces. In contrast Denver, Dallas and Atlanta saw their balances shrink over this same period.

Ideally, regional economies that work well for their residents should maintain a balance between the supply and demand for jobs and workers. **Job growth-labor force growth alignment** measures this by comparing the number of jobseekers to the number of jobs available. The previous timeframe 1999–2009 overlapped with some of the severest parts of the Great Recession causing all regions and the nation to show negative growth alignment. The current 10-year period of 2003–2013 saw all Texas areas reclaim positive growth alignment, lead by the Gulf Coast region. Miami, Atlanta, San Diego and the U.S. continued to display negative growth, which signified an ongoing surplus of jobseekers relative to the number of jobs available.

2014 GLOBAL CITIES INDEX

This index from management consulting firm A.T. Kearney examines a comprehensive list of 84 cities on every continent, measuring how globally engaged they are across 26 metrics in five dimensions: business activity, human capital, information, exchange, cultural experience and political engagement.

Based on all five dimensions, Houston ranked 38th overall among 84 cities compared, the same rank it received in 2012. This placed the Gulf Coast region behind Miami and Atlanta and ahead of Dallas. San Diego and Denver were not among the cities included in the 2014 Global Cities Index.

1. New York
2. London
29. Miami
36. Atlanta
37. Munich
38. Houston
50. Dallas

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Income, Wealth and Poverty

Income, wealth and poverty levels reflect to varying degrees how well regional economies and labor markets work for their residents. The majority of the data in this year's Report Card refers to 2013, which is roughly four years after the previous Report Card's data and the end of the Great Recession. As a result, some of the negative effects of the most recent downturn on households' financial well-being have begun to fade for many areas and the U.S.

Measuring changes in household income is important as it captures to what extent household purchasing power is sustained over time. **Nominal median household income rose** for all regions in contrast to the previous Report Card. However, after adjusting each region's income by its respective rate of inflation, **real median household income fell** across all areas. Atlanta saw the largest decline between 2009 and 2013, followed by San Diego and Miami. San Antonio, Dallas and Houston saw the smallest real declines, respectively, over this same period.



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Measuring changes in household income is important as it captures to what extent household purchasing power is sustained over time. Nominal median household income rose for all regions in contrast to the previous Report Card.

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Another measure of financial well-being is captured by the income needed for a family to attain a secure yet modest standard of living based on local, typical living expenses or what might be termed a **“living wage.”** Assuming a family unit composed of two parents and two children, the annual total income needed to comfortably meet basic needs ranged from \$61,459 in San Antonio to \$71,673 in San Diego. Houston required the third-smallest annual income at \$63,725.

	Monthly Cost for a Family with Two Children 2013								
	Housing	Food	Child Care	Transportation	Health Care	Other Necessities	Taxes	Monthly Total	Annual Total
Houston	\$945	\$754	\$961	\$577	\$1,380	\$435	\$258	\$5,310	\$63,725
Atlanta	\$874	\$754	\$833	\$577	\$1,401	\$417	\$310	\$5,166	\$61,994
Dallas	\$887	\$754	\$961	\$607	\$1,526	\$420	\$247	\$5,402	\$64,826
Denver-Aurora CMSA	\$934	\$754	\$1,233	\$607	\$1,439	\$432	\$442	\$5,842	\$70,113
Miami	\$1,122	\$754	\$864	\$607	\$1,431	\$480	\$298	\$5,556	\$66,667
San Antonio	\$870	\$754	\$961	\$607	\$1,272	\$416	\$242	\$5,122	\$61,459
San Diego	\$1,382	\$754	\$953	\$607	\$1,354	\$547	\$376	\$5,973	\$71,673

Source: The Economic Policy Institute

Income measures such as a living wage can be useful for determining the dollar-amount needed to fulfill basic needs, yet they fail to capture the differences in the cost of living between areas. The **Regional Purchasing Power Parity** index allows for comparisons between any two areas with the U.S. serving as the benchmark. In 2012, Houston registered a value of 100.7 indicating that the cost of living in the Gulf Coast region was 0.7 percent higher than the U.S. as a whole. Conversely, Atlanta was 4.4 percent less expensive than the U.S. for the same year. Overall, Houston has been close to the national average since 2008 while San Antonio has had the relatively lowest cost of living and San Diego the highest over the five-year period.

	Regional Purchasing Power Parity by Selected Metropolitan Area 2008 – 2012							
	Houston	Atlanta	Denver	Dallas	Miami	San Antonio	San Diego	U.S.
2008	100.5	99.2	100.3	102.4	105.2	94.6	112.3	100.0
2009	101.0	98.5	101.8	102.1	105.1	94.7	113.0	100.0
2010	101.0	97.1	102.5	101.3	104.3	94.0	114.9	100.0
2011	101.0	96.7	102.5	101.2	103.9	94.2	115.4	100.0
2012	100.7	95.6	104.2	101.0	105.0	93.9	119.0	100.0

Source: Bureau of Economic Analysis

The **percentage of families in poverty** decreased in all regions and the U.S. with the exceptions of San Diego and Atlanta since the last Report Card. Miami, the Gulf Coast region, San Antonio and Atlanta had the highest poverty rates, respectively, all of which were higher than the nation. Denver had the lowest poverty rate of the comparison areas.

Despite improvements on many indicators that worsened during the recession, the **percentage of households receiving public assistance** increased across all regions and the nation. Miami had the highest percentage of households receiving public assistance and was the only region with a higher percentage than the nation. Denver had the lowest percentage while the Gulf Coast had the fourth-lowest of the seven regions.

The **percentage of individuals (16 years and over) in poverty and working** saw a relatively dramatic fall in San Diego giving it the lowest rate of the cohort while a more modest decline was observed for the Gulf Coast. All other areas and the U.S. saw this indicator rise from the previous Report Card possibly reflecting the lingering effects of the recession. In contrast to the other poverty indicators where Denver had lowest proportions of individuals, the Mile High City had the highest percentage of working individuals in poverty based on the 2013 Census poverty threshold of \$11,888. The next highest rates were found in the Gulf Coast region, Dallas and San Antonio. All regions except San Diego and Miami had rates higher than the national average of 32%.

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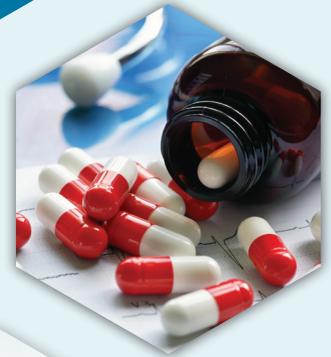
BUSINESS ACTIVITY

A.T. Kearny's 2014 Global Cities Index indicator *Business Activity* evaluates cities based on the number of headquarters of major global corporations, locations of top business services firms, the value of a city's capital markets, the number of international conferences and the flow of goods through ports and airports. Houston ranked five spots below the middle in 47th place out of 84 cities total.

1. New York
2. Paris
3. Tokyo
43. Miami
47. Houston
48. Atlanta
56. Dallas

.....

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Individuals who do not have health insurance coverage face insufficient access to medical care and greater financial risk from medical expenses. As found in the previous Report Card, Denver had the lowest percentage of individuals with **no health insurance** at 14% and the highest percentage with **employer-provided health insurance** at 58%. The Gulf Coast region had the second-highest percentage without health insurance at 23% and the fourth-lowest rate of employer-provided coverage 51%. Miami performed the worst on both measures with highest rate of individuals without health insurance and the lowest percentage with employer-provided coverage. Since the last Report Card, the percentage of individuals without health insurance declined across all regions. Dallas saw the largest improvement between 2009 and 2013, followed by the Gulf Coast region, indicating increased access across the two largest Texas metropolitan areas. A potentially concerning trend was broad-based decline in the percentage of workers with employer-provided insurance. Miami, Denver and San Antonio saw the largest declines, respectively, while the Gulf Coast region saw the second-smallest decline. One contributing factor may be the growing trend of employers no longer offering coverage to spouses. Note that the implementation of major provisions of the Affordable Care Act beginning in 2014 may potentially compensate for these declines in the future.

Since the last Report Card, the percentage of individuals without health insurance declined across all regions.

Quality of Life

The overall desirability of a region as a place to live has an indirect, but important impact on the region's competitiveness and health of its labor market. Regions that are perceived as being economically vibrant, culturally diverse, affordable and safe with access to services and amenities have an advantage in attracting and retaining the best employers and talent.

Since the last Report Card **median home values**, the point at which 50% of homes are either more or less expensive, rose across the three Texas regions and Denver lead by San Antonio up 7%. Houston saw the third-largest gain with 3% while Miami saw the largest decline, down 17% reflecting the uneven recovery around the nation. Despite falling prices, San Diego remained the region with highest median home value at \$411,000. Of the comparison areas, Texas regions had the lowest median home values with Houston displaying the second-lowest median price at \$144,000.

In general, rising home values are a desirable outcome. This is particularly the case if it results in a return to positive equity in one's home as many individuals found themselves owing more than their homes were worth in the wake of the recession. However, rapid appreciation in values can also result in housing costs that consume a disproportionate amount of income. Furthermore when home value appreciation outpaces wage gains, this can serve as a barrier to homeownership for new entrants into the housing market. The five-year **average home appreciation rate** from 2008 to 2013 rose in five of the seven regions. San Diego saw the largest increase up 11% while the Gulf Coast rose 10%. Two areas, Atlanta and Miami, saw home values decline over this same period.



A general rule of thumb suggests that spending on housing, whether owned or rented, should not exceed 30% of one's gross monthly income. Beyond this figure there is concern that a household could have difficulty affording other necessities such as food, clothing, transportation and health care. Hence, if a growing percentage of a region's population is surpassing this threshold it could serve as a drag on overall growth due to less discretionary income and greater financial instability during an economic downturn. The Gulf Coast region had the third-lowest **percentage of housing units with monthly home ownership costs greater than 30%**. Only Dallas and San Antonio had lower proportions while Miami and San Diego had the highest percentages of housing units with costs above the recommended threshold.

Another way of evaluating housing affordability lies in the relationship between a home's value and its owner's income. Of the comparison regions, the Gulf Coast retained the title of lowest **ratio of home value to annual income** at 2.52, which was slightly above the 2.5 ratio recommended by many mortgage lenders and financial advisors. San Diego displayed the highest home value to income ratio at 6.69 reflecting its high median home values as well as the high percentage of housing units with costs above 30% of monthly income.

The decision to buy a home rather than rent remains one of the most important financial decisions that one can make. Since the recession, large numbers of would-be homebuyers have been excluded from what many consider a rite of passage due to stricter lending requirements or the conscious choice to rent rather than own in an uncertain job market. Consequently, homeownership rates have fallen to their lowest levels in over two decades as rents reach new highs. Since the last Report Card, the **rate of homeownership versus renting** fell in every region and the nation with Atlanta experiencing the steepest decline. Houston saw the second-smallest decrease in this indicator preceded only by Denver. The Mile High City also managed the highest percentage of owned housing units in the cohort at 64% while homeownership in Gulf Coast was comparatively low at 60%.

CULTURAL EXPERIENCE

In A.T. Kearny's 2014 Global Cities Index, *Cultural Experience* is measured based on the number of diverse attractions, including the number of major sporting events a city hosts; the number museums, performing-arts venues and diverse culinary establishments; the number of international travelers; and the number of sister-city relationships that a particular reference city has. Miami and Atlanta ranked in the top half of the 84 comparison cities while Houston (55th) and Dallas ranked in the bottom half.

1. London
27. San Francisco
32. Miami
35. Atlanta
40. Hong Kong
55. Houston
64. Dallas

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Another factor besides housing affordability that can affect the desirability of region involves transportation. Given that most individuals commute between home and work on a daily basis, the time spent traveling can greatly impact one's quality of life. The longest **mean travel time to work** was found in Atlanta at 30 minutes followed by the Gulf Coast region clocking in at 29.1 minutes. San Diego had the shortest commute time with 24.9 minutes. Since the last Report Card, commute times rose across five areas and the U.S. As a testament to the rapid growth seen since the recession, commute times in the Gulf Coast region rose the most, up 1.6 minutes, followed by Dallas and Miami. Commute times in Atlanta and San Antonio fell slightly over this same period.

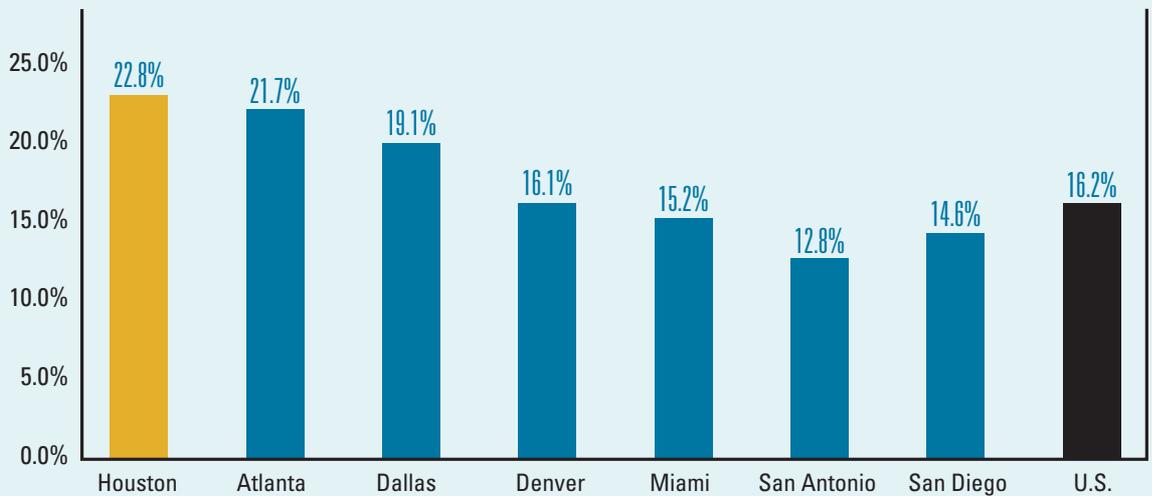
In reality, one's commute time will vary widely depending on home and work locations and traffic patterns. In the Gulf Coast region, one in four residents works in a county other than the one in which they live. For this reason, it is also worth examining the proportions of the working-age population who experience commute times over a certain threshold. While a plurality (17.4%) of workers in Houston had a commute of 30 to 34 minutes, nearly 23% of Houstonians had a daily commute of 45 minutes or more. This was the highest proportion of the comparison areas followed by Atlanta and Dallas. San Antonio had the lowest proportion with 12.8%.

POLITICAL ENGAGEMENT

A.T. Kearny's 2014 Global Cities Index indicator *Political Engagement* assesses how a city influences global policy dialogue as measured by the number of embassies and consulates, major think tanks, international organizations and local institutions with international reach that reside in the city and the number of political conferences a city hosts. On this measure Houston ranked just below the middle with 45th place out of 84 cities total.

1. District of Columbia
14. Mexico City
26. Atlanta
45. Houston
56. Shanghai
57. Miami
71. Dallas

Percentage of Workers 16 and Older with Commute Times 45 Minutes or More – 2013



Source: U.S. Census Bureau – American Community Survey

One might assume that longer commute times to work would result in increased use of alternative forms of transportation whether public or private in the form of carpooling. Surprisingly, this relationship proved less than straightforward as evidenced by changes in the **usage rates of public transportation or carpooling** since the previous Report Card. While Houston experienced the largest increase in commute times, it saw only a slight increase in public transit use and moreover the largest decline in carpooling of the comparison areas, although all areas had fewer carpoolers. Miami experienced the largest increase in public transportation use while Denver experienced the smallest drop in carpoolers. Overall, public transit use was highest in Denver and lowest in Dallas with the Gulf Coast region falling in between. Carpooling was most prevalent in San Antonio followed by the Gulf Coast region.

With this year's Report Card we introduce two new indicators that seek to further gauge the quality of life across regions. **Violent crime per 100,000 residents** was highest in the Gulf Coast region at 559 followed by Miami (539) and San Antonio (460). Denver had the lowest rate at 315 incidents per 100,000 residents. **Property crime per 100,000 residents** was highest in San Antonio at 4,415 followed by Miami (3,691) and the Gulf Coast region (3,489). The lowest rate was found in San Diego with 2,192 incidents per 100,000 residents.

Given that most individuals commute between home and work on a daily basis, the time spent traveling can greatly impact one's quality of life.

Education Achievement and Investment

For the demand side of a regional economy (i.e. employers), the most critical aspect is the skill level of the workforce. Skill level is in turn heavily influenced by educational outcomes. As a supplement to the expanded look at the education challenges facing the region found in the first half of this Report Card, the following sections examine a few of the most basic education-related indicators serving as proxies for workforce readiness.

The “averaged” freshman graduation rate is an estimate of the percentage of entering high school freshman graduating four years later. For the school year ended in 2009, the most recent year for which data were available, the lowest “averaged” freshman graduation rates were recorded in Miami (71.2%), the Gulf Coast region (73.7%) and Atlanta (74.4%). Denver emerged as the metropolitan area with the highest rate at 80.4% while data for San Diego were unavailable. All cities experienced higher “averaged” freshman graduation rates since the Report Card. Of the six regions for which data were available, Miami saw

the largest improvement in graduation rates followed by Denver and Atlanta. The

Gulf Coast saw the second-smallest improvement falling between San Antonio and Dallas. (See related indicator adjusted cohort graduation rate in this Report Card’s expanded look at education for additional information.)



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For the demand side of a regional economy (i.e. employers), the most critical aspect is the skill level of the workforce. Skill level is in turn heavily influenced by educational outcomes.

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As a means for comparing public investment in education, **expenditure per student** saw a mixture of gains and losses since the last report. All three areas in Texas saw increases in spending per pupil between \$200 and \$300 in contrast to Atlanta, Denver and San Diego, which saw declines between \$650 and \$800 per student. Despite increased spending among Texas met areas, they each remained roughly \$2,000 below the national average.

Overall **educational attainment** among the populations of each area improved since the last Report Card. The Gulf Coast region registered the largest percentage point gain in residents with **bachelor's** or **associate's degrees**. However despite a two-percentage-point increase in the number of residents with a **high school diploma or equivalent**, the Gulf Coast region maintained the lowest percentage of individuals with this level of education at 82%. Denver once again displayed the highest rates of attainment on all three educational levels.

One aspect with the potential to greatly impact educational attainment is the percentage of people age 5 and over with **limited English proficiency**. This indicator declined across four areas: Denver, Dallas, San Diego and the Gulf Coast Region. Atlanta and Miami experienced increases while San Antonio saw little change since the last report. The Gulf Coast had the second-highest rate at 17%, preceded only by Miami with 23%.

The national figure cited in this report uses the NEA estimate for New York to calculate the national average, as the New York figure was not available from NCES. Given the state's outsized spending per pupil of roughly \$17,000 to \$19,000 in addition to being the third-largest state in the U.S., a national average calculated without NY was considerably lower and therefore misleading. The number borrowed from NEA was \$17,550 for NY. This is approximately the same as figured reported by NCES for the 2007-2008 school year.

HUMAN CAPITAL

A.T. Kearny's 2014 Global Cities Index indicator *Human Capital* evaluates a city's ability to attract talent based on the following measures: size of foreign-born population, quality of universities, number of international schools, international student population and number of residents with university degrees. Miami (15th) and Houston (17th), ranked in the top 20% of the 84 cities compared.

1. New York

15. Miami

17. Houston

21. District of Columbia

25. Atlanta

29. Beijing

34. Dallas

MEASURE	INDICATOR
	Total Population
MACROECONOMY & INDUSTRY DYNAMICS	Population Growth (Census Estimates 2008-2013)
	% Change Metropolitan GDP (BEA 2012-2013)
	% Change Metropolitan GDP (BEA 2008-2013)
	% Growth in Business Establishments (Economic Census 2007-2012)
	Industrial Diversity - Entropy Index (BLS 2013)
	Industrial Diversity - Hachman Index (BLS 2013)
EMPLOYMENT & UNEMPLOYMENT	Unemployment Rate (BLS 2013)
	Net Change in Unemployment Rate (ACS 2012-2013)
	Rate of Job Growth (BLS 2008-2013)
	Net Job Growth (BLS 2008-2013)*
	% Not in the Labor Force (ACS 2013)
LABOR FORCE COMPOSITION	% Managerial, Professional & Related Jobs (ACS 2013)
	Simpson Index of Racial & Ethnic Diversity (ACS 2013)*
	% Foreign-Born (ACS 2013)*
	Median Age (ACS 2013)*
	Change in Median Age by Years (ACS 2011-2013)
	Balance Between Entering & Exiting Workforce (ACS 2013)
	Job Growth-Labor Force Growth Alignment (BLS 2003-2013)
INCOME, WEALTH & POVERTY	Nominal Median Household Income (ACS 2013)
	Change in Real Median Household Income (ACS & BLS CPI-U 2009-2013)
	Living Wage for a Family of Four (EPI 2013)
	Regional Purchasing Parity (BEA 2012)
	% of Family Households with Single Female Parent (ACS 2013)
	% of Families in Poverty (ACS 2013)
	% in Poverty and Working - 16 years and over (ACS 2013)
	% No Health Insurance (ACS 2013)
	% with Employer-Provided Health Insurance (ACS 2013)
	% of Households Receiving Public Assistance (ACS 2013)

* Not used in scoring

** Uses NEA 2010-2011 data for NY to compute national average as N/A from NCES

Interpretation Key:

"+" indicates that higher values are generally preferred to lower values.

"-" indicates that lower values are generally preferred to higher values.

"0" indicates that values closer to 0 are generally preferred regardless of whether they are positive or negative.

"=" signifies that an indicator is sufficiently ambiguous that its impact on the economy cannot be determined, i.e. a "neutral" interpretation is advisable.

"=/" signifies that a neutral interpretation with a preference for higher values in certain contexts is advisable.

"=-/" signifies that a neutral interpretation with a preference for lower values in certain contexts is advisable.

GULF COAST	ATLANTA	DALLAS	DENVER	MIAMI	SAN ANTONIO	SAN DIEGO	U.S.	Interpretation
6,313,158	5,524,693	6,812,373	3,277,309	5,828,191	2,277,516	3,211,252	316,128,829	

10.69%	2.38%	7.21%	7.47%	7.64%	12.11%	7.00%	3.97%	+
5.76%	3.69%	3.52%	6.18%	4.27%	4.44%	3.64%	3.24%	+
23.97%	10.42%	18.62%	16.68%	6.44%	22.64%	12.04%	13.65%	+
5.18%	-5.35%	3.65%	-1.13%	-1.27%	2.44%	-2.35%	-3.55%	+
2.206	2.124	2.159	2.162	2.085	2.161	2.125	2.138	+
0.837	0.944	0.970	0.956	0.936	0.962	0.970	1.000	+

6.20%	7.90%	6.20%	6.50%	7.40%	6.00%	7.50%	7.40%	-
-0.60%	-0.90%	-0.60%	-1.12%	-1.30%	-0.50%	-1.40%	-0.70%	-
7.14%	-0.91%	3.88%	3.52%	-0.53%	6.25%	0.04%	-0.58%	+
185,800	-22,100	115,300	52,900	-12,400	53,300	500	-802,000	+
32.63%	32.88%	30.88%	29.88%	37.23%	35.46%	35.77%	36.42%	-

37.21%	39.00%	37.60%	42.12%	33.08%	33.96%	39.92%	36.35%	+
0.69	0.64	0.66	0.50	0.67	0.58	0.65	0.56	=/+
22.55%	13.31%	17.46%	11.51%	38.85%	11.64%	23.72%	13.08%	=/+
33.6	35.7	34.2	35.9	40.4	34.2	35.1	37.5	=
0.2	0.5	0.5	0.2	0.3	0.1	0.3	0.2	0
3.07%	2.68%	3.15%	0.96%	0.52%	4.02%	3.89%	1.51%	0
1.03%	-3.82%	0.52%	0.43%	-8.25%	0.52%	-3.11%	-1.42%	0

\$57,366	\$55,733	\$57,398	\$63,095	\$46,946	\$51,716	\$61,426	\$52,250	=
-2.8%	-6.6%	-0.8%	-3.4%	-5.0%	-1.3%	-5.1%	-4.2%	+
\$63,725	\$61,994	\$64,826	\$70,113	\$66,667	\$61,459	\$71,673	n/a	=
100.7	95.6	103.6	101.0	105.0	93.9	119.0	100.0	-
12.16%	12.70%	12.09%	10.03%	12.40%	12.22%	9.52%	10.93%	-
13.23%	11.98%	11.54%	8.46%	14.03%	12.46%	11.26%	11.61%	-
37.28%	33.87%	37.03%	40.30%	28.72%	36.97%	27.31%	31.72%	=/-
22.83%	18.73%	21.48%	13.79%	24.81%	19.36%	16.26%	14.52%	-
51.01%	55.13%	52.38%	58.26%	39.98%	48.71%	50.83%	54.01%	+
14.75%	16.79%	13.93%	10.13%	20.06%	16.76%	10.34%	17.01%	-

MEASURE	INDICATOR
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QUALITY OF LIFE	
Housing Trends	Median Home Value (ACS 2013)
	% Monthly Home Ownership Cost Greater than 30% (ACS 2013)
	% Monthly Rental Cost Greater than 30% (ACS 2013)
	% Housing Units Owned versus Rent (ACS 2013)
	Average Home Appreciation, 5 years through Q4 (2008-2013)
	Ratio of Home Value to Annual Income (ACS 2013)
Travel to Work	Mean Travel Time to Work (minutes) (ACS 2013)
	% Using Public Transportation (ACS 2013)
	% Carpooling (ACS 2013)
Environment	Number of Days Air Rate "Unhealthy" or "Unhealthy for Sensitive Groups"
Crime Prevalence	Violent Crime per 100,000 Inhabitants (FBI 2013)
	Property Crime per 100,000 Inhabitants (FBI 2013)

EDUCATIONAL ACHIEVEMENT & INVESTMENT	% Bachelor's or Higher (25 and older) (ACS 2013)
	% Associate's or Higher (25 and older) (ACS 2013)
	% HS Diploma or Equivalent (25 and older) (ACS 2013)
	% Limited English Proficiency (ACS 2013)
	Averaged Freshman Graduation Rate (NCES 2008-09)
	Expenditure by Student (NCES & NEA 2010-2011)**

* Not used in scoring

** Uses NEA 2010-2011 data for NY to compute national average as N/A from NCES

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GULF COAST	ATLANTA	DALLAS	DENVER	MIAMI	SAN ANTONIO	SAN DIEGO	U.S.	Interpretation
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\$144,400	\$160,800	\$152,700	\$258,500	\$188,800	\$134,000	\$411,000	\$173,900	=
22.39%	25.08%	22.24%	24.36%	37.00%	20.89%	34.30%	25.31%	-
44.83%	48.63%	44.55%	48.91%	59.79%	44.40%	53.65%	47.64%	-
60.13%	63.32%	59.50%	63.93%	60.67%	61.38%	52.77%	63.50%	+
10.37%	-13.42%	5.61%	11.12%	-4.31%	6.14%	11.18%	-4.58%	+
2.52	2.89	2.66	4.10	4.02	2.59	6.69	3.33	-
29.1	30.0	27.3	26.7	27.7	25.0	24.9	25.8	-
2.37%	3.08%	1.39%	4.29%	4.07%	2.51%	3.17%	5.17%	+
10.91%	10.39%	10.09%	9.12%	9.60%	11.01%	9.61%	9.36%	+
15	2	12	4	1	10	19	n/a	-
559.0	389.1	332.9	314.8	538.9	459.7	348.6	367.9	-
3,488.8	3,330.8	3,036.4	2,639.0	3,690.5	4,415.2	2,191.9	2,730.7	-

30.91%	35.16%	32.62%	40.97%	29.34%	26.75%	34.56%	29.62%	+
37.04%	42.54%	39.18%	48.56%	38.47%	34.29%	43.68%	37.68%	+
82.05%	88.17%	84.39%	90.13%	84.67%	84.22%	85.49%	86.60%	+
16.59%	7.42%	13.44%	7.61%	23.31%	11.25%	15.92%	8.48%	-
73.69%	74.44%	77.01%	80.36%	71.19%	75.15%	-	75.50%	+
\$8,387	\$9,215	\$8,436	\$8,775	-	\$8,588	\$8,925	\$10,490	=/+



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