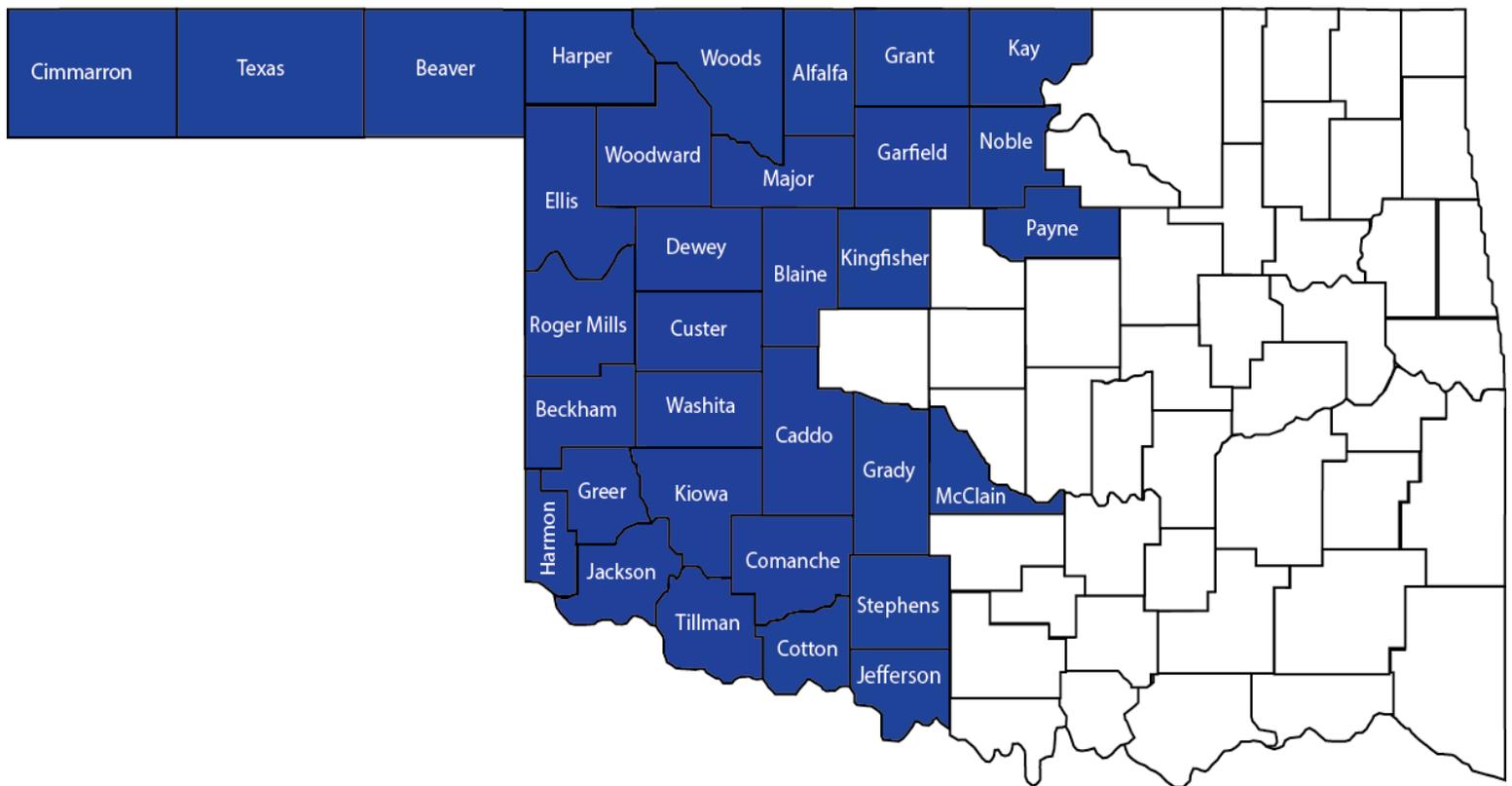


Western Oklahoma Planning Region

April 2016

Overview and Purpose

The Workforce Innovation and Opportunity Act (WIOA) represents a commitment to workforce development for individual and national economic growth. WIOA seeks to increase opportunities for individuals, especially those facing barriers to employment, and invests in the imperative connection between education and the career preparation. Planning regions have been created based on state labor market areas, regional economic development areas, and funding mechanisms for educational centers including colleges, universities, and CareerTechs. One primary purpose of the planning regions is to foster necessary partnerships that reduce costs and meet training needs of Oklahoma’s workforce. Planning regions allow to more effectively prioritize training for in-demand occupations unique to the area, while streamlining efficiency. The Western Oklahoma Planning Region is comprised of thirty-three counties: Alfalfa, Beaver, Beckham, Blaine, Caddo, Cimarron, Comanche, Cotton, Custer, Dewey, Ellis, Garfield, Grady, Grant, Greer, Harmon, Harper, Jackson, Jefferson, Kay, Kingfisher, Kiowa, Major, McClain, Noble, Payne, Roger Mills, Stephens, Texas, Tillman, Washita, Woods, and Woodward.

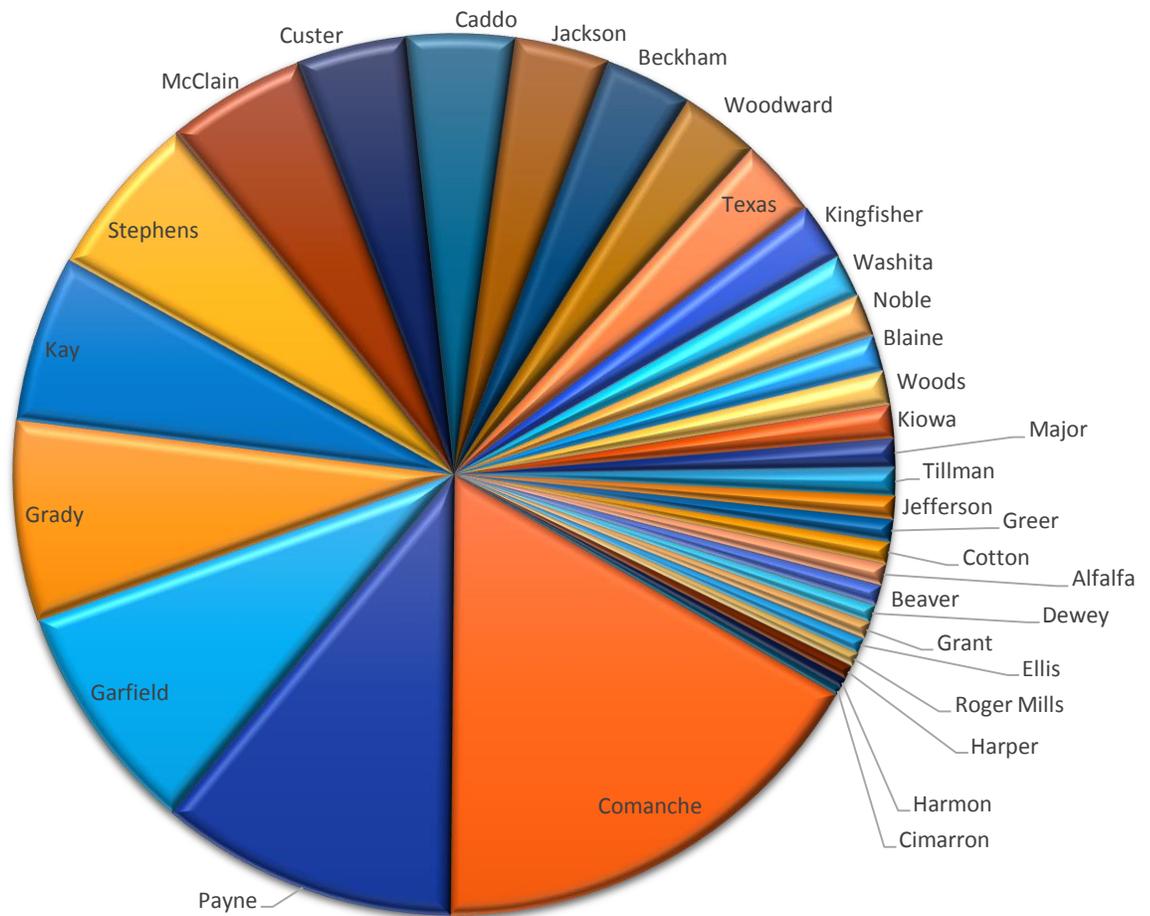


Population of the Western Oklahoma Planning Region

The Western Planning Region counties combine for an estimated population of 741,680. This accounts for 19% of the total state population. Lawton is the largest city in the region with an estimated population of 97,020.

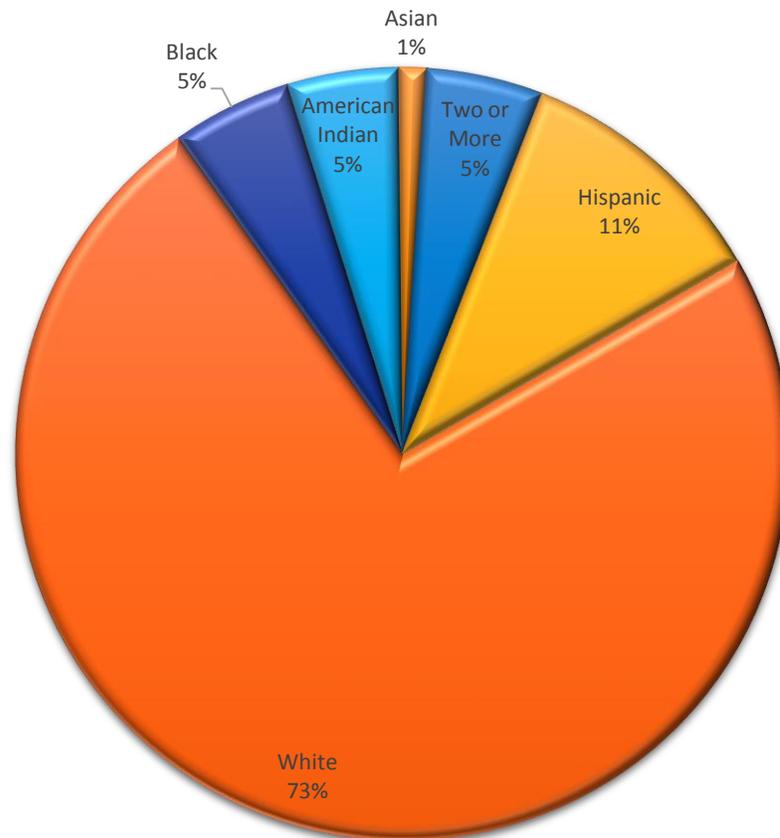
- According to 2015 Census estimates, Comanche County, home to Lawton, is the most populous county in the region with an estimated population of 124,650. Payne County is second largest with 80,850 people.
- Cimarron County in the panhandle is the least populated county in the region, with an estimated population of 2,220.
- Since 2010, and with so many counties, the region has experienced varied population growth. Seventeen of the counties in the region experienced population increase, led by McClain County at 8.1%. Sixteen counties experienced population decline, with Blaine losing the most at -17.7%.
- Ten counties had population gains of 4% or more – led by McClain (8.1%), Beckham (7.5%), Custer (7.4%), and Woodward (7.4%).
- Of the sixteen counties that lost population, only three lost more than 5%.

Western Planning Region Population



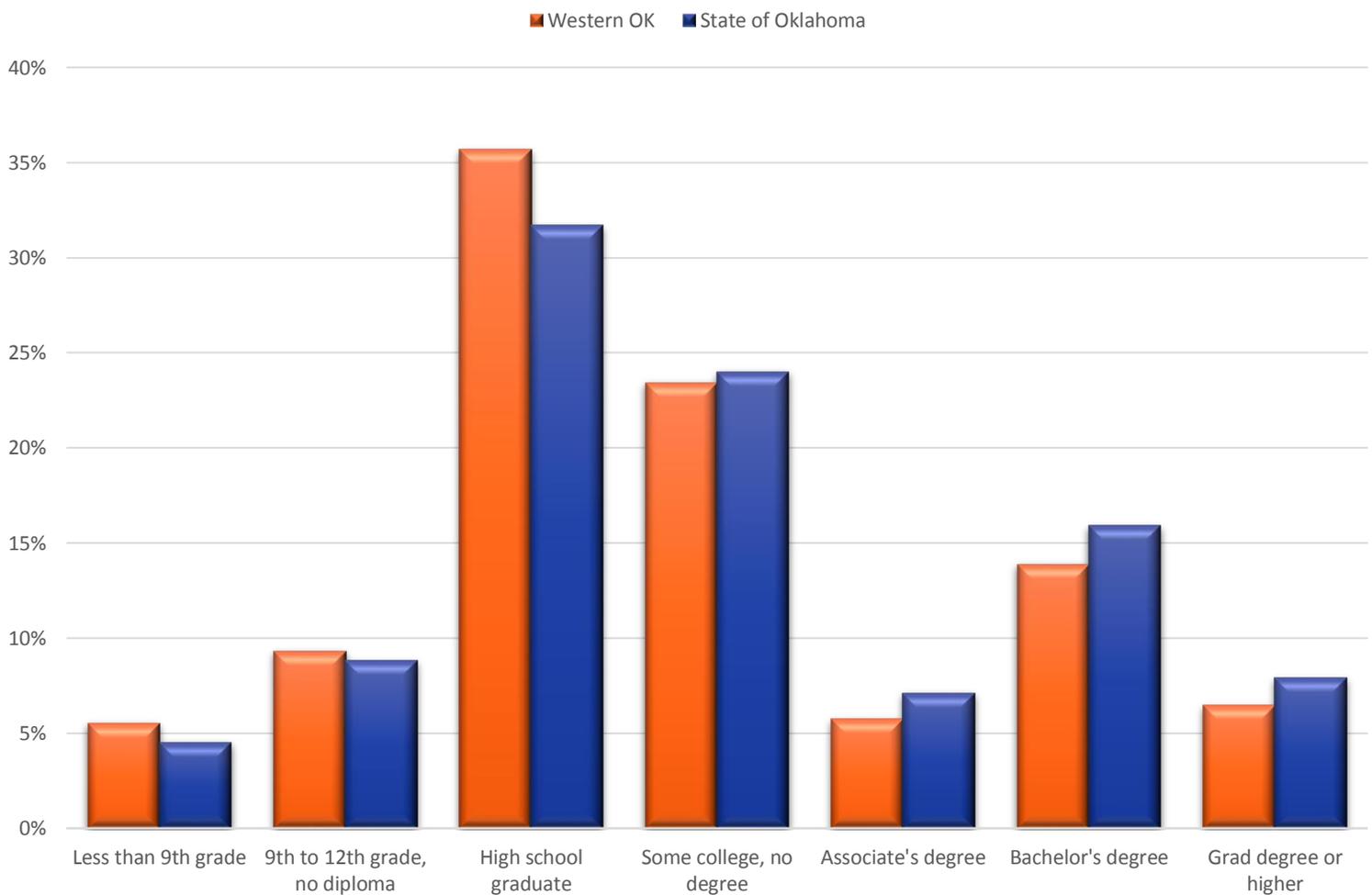
Western Oklahoma Planning Region Population Breakdown by Race:

- 73.2% of residents in the Western Oklahoma Planning Region identify themselves as White. This is more than the statewide average of 68%.
- With 39,550 people, Black is the second most populous group in Western Oklahoma. They account for 5% of the population.
- Two or More Races consist of 5% of the population. American Indian makes up 4.6% of the population, while all remaining races account for one percent or less of the population.
- Hispanics, which are categorized as an ethnicity by the Census bureau, make up 11% of the total population in Western Oklahoma. Hispanics actually consist of the 2nd largest minority group in Western Oklahoma with 78,650 people.



Educational Attainment in the Western Oklahoma Planning Region:

- 85.2% of people residing in the Western Oklahoma Planning Region have attained at least a high school degree. This is slightly below the statewide average of 86.6%.
- Western Oklahoma has educational attainment very close to the state averages. However, the Western Oklahoma Planning Region has lower percentages of individuals with “bachelor’s degree”, and “associate’s degree” than the state average
- Bachelor’s degree is the largest gap of post-secondary educational attainment between region and state averages, at 2%.
- At the secondary level, the Western Oklahoma Planning Region has a higher percentage of individuals whose furthest educational attainment is “less than 9th grade”, “9th to 12th grade” and “high school graduate” compared to the state average.

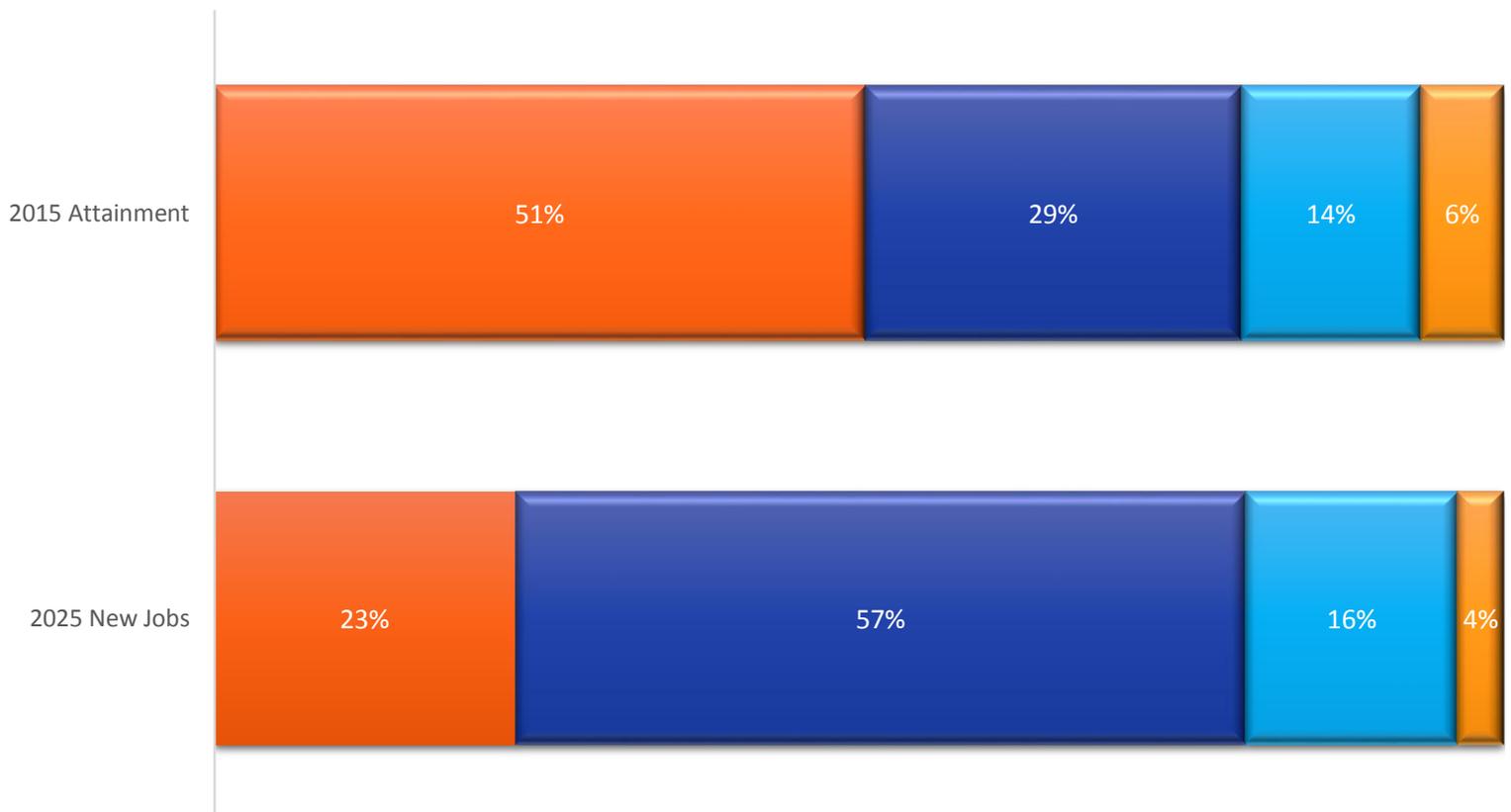


Western Oklahoma Planning Region Education Gap

- By 2025, 23% of all new jobs in the Western Oklahoma Planning Region will require a high school degree or less, but 57% will require post-secondary training. Currently only 29% of individuals in the area have some post-secondary training or an associate’s degree. By 2025, 14% of new jobs will require a bachelor’s degree, and 6% will require a graduate degree or higher.
- Based on the projected demand and current educational attainment levels, the Western Oklahoma Planning Region has a significant gap in the post-secondary/associate’s degree/certificate level if they want to be able to meet the needs that may emerge in the area.
- There is always opportunity to encourage further education, especially considering the gap in the post-secondary training and those with a high school diploma, or less. That segment of the population could be targeted to become candidates for further education or attaining certificates. Decreasing the number of individuals with high school or less, and increasing numbers of trained post-secondary individuals will lead to better jobs and potential to create wealth.
- There is a slight surplus of individuals in the grad degree or higher category compared with new job requirements for that sector in 2025.

Western Oklahoma Planning Region Education Gap for Jobs by 2025

■ High School and Less
 ■ Associates/Certificate/Credential
 ■ Bachelors
 ■ Graduate



Source: OK Office of Workforce Development; EMSI 2016.1
 2025 Estimates based on new jobs created and entry level job requirements

Western Oklahoma Region Educational Assets

Colleges, Universities, and Career Techs are vital in developing the workforce of Western Oklahoma. The region is home to several educational institutions that help develop the region's workforce. These institutions help supply organizations and companies with the labor and skills necessary for today's economy. Colleges, Universities, and Career Techs can work with employers in Western Oklahoma to find gaps in employee skills.

Career Techs

There are thirteen Career Techs in the Western Oklahoma Region area with eighteen locations:

- **Autry Tecnology Center** (Enid)
- **Caddo-Kiowa Technology Center** (Ft. Cobb)
- **Canadian Valley Technology Center** (Chickasha)
- **Chisolm Trail Technology Center** (Omega)
- **Great Plains Technology Center** (Lawton; Frederick)
- **High Plains Technology Center** (Woodward)
- **Meridian Technology Center** (Stillwater)
- **Mid-America Technology Center** (Wayne)
- **Northwest Technology Center** (Fairview; Alva)
- **Pioneer Technology Center** (Ponca City)
- **Red River Technology Center** (Duncan)
- **Southwest Technology Center** (Altus)
- **Western Technology Center** (Sayre; Weatherford; Hobart; Burns Flat)

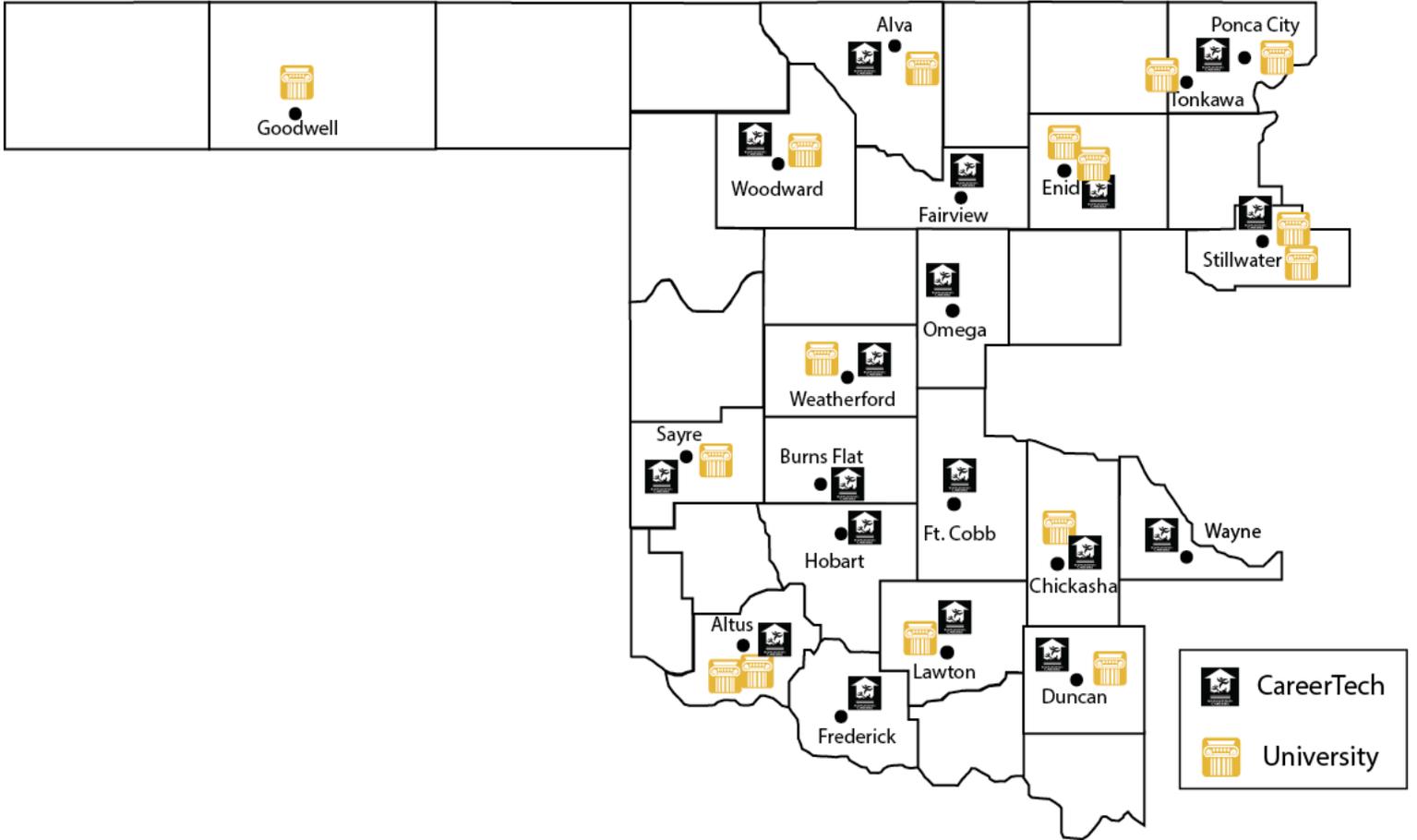
Colleges and Universities

Source: Oklahoma Career Tech

There are sixteen colleges and universities in the region:

- **Cameron University** (Lawton; Duncan)
- **Northern Oklahoma College** (Stillwater; Enid; Tonkawa)
- **Northwestern Oklahoma State University** (Enid; Alva; Woodward)
- **Oklahoma Panhandle State University** (Goodwell)
- **Oklahoma State University** (Stillwater)
- **Southwestern Oklahoma State University** (Weatherford; Sayre)
- **University Center at Ponca City** (Ponca City)
- **University of Science and Arts Oklahoma** (Chickasha)
- **Wayland Baptist University** (Altus)
- **Western Oklahoma State College** (Altus)

Source: Oklahoma State Regents for Higher Education

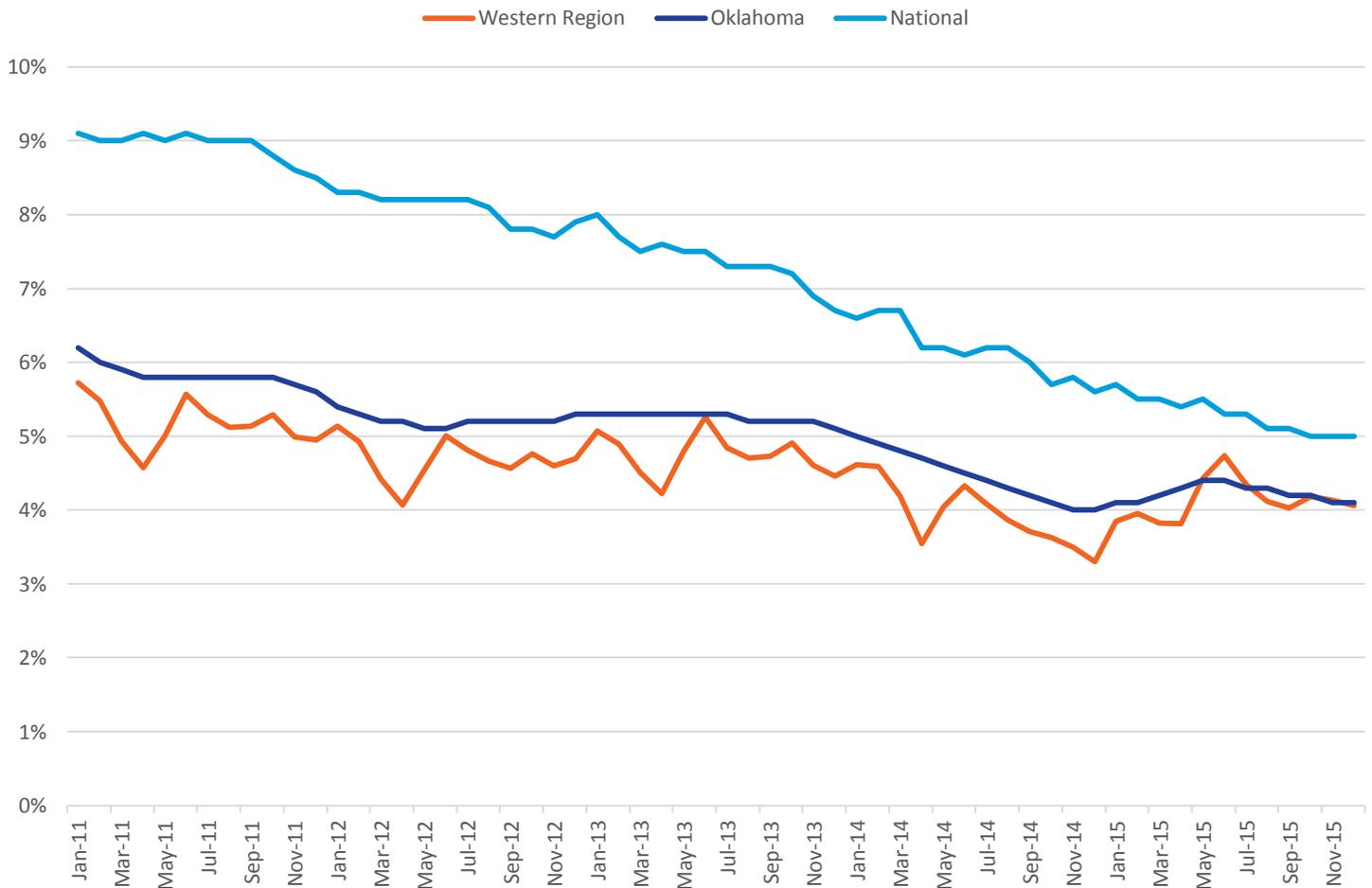


Economic Data

Unemployment Rate:

- Since January 2011, the Western Oklahoma Planning Region has – almost exclusively - stayed below the state unemployment rate, and well below the national unemployment rate. After reaching a peak of 5.5% in January 2011, the Western Oklahoma Planning Region unemployment rate has declined, and in December 2015 the unemployment rate was 4.1%.
- The Western Oklahoma unemployment rate and the state unemployment rate have remained relatively similar since January 2011. Both the Western Oklahoma Planning Region and the state average unemployment rate have stayed below the national average over the five year historical period.
- Both Western Oklahoma and the State have maintained a gradual declining trend in unemployment rates since peaking in January 2011.
- If unemployment rates drop too low, employers have a smaller pool of candidates to choose from when hiring. Additionally, low unemployment rates mean fewer job openings for employees looking to change jobs. Fortunately, the region has been able to maintain a healthy unemployment rate.

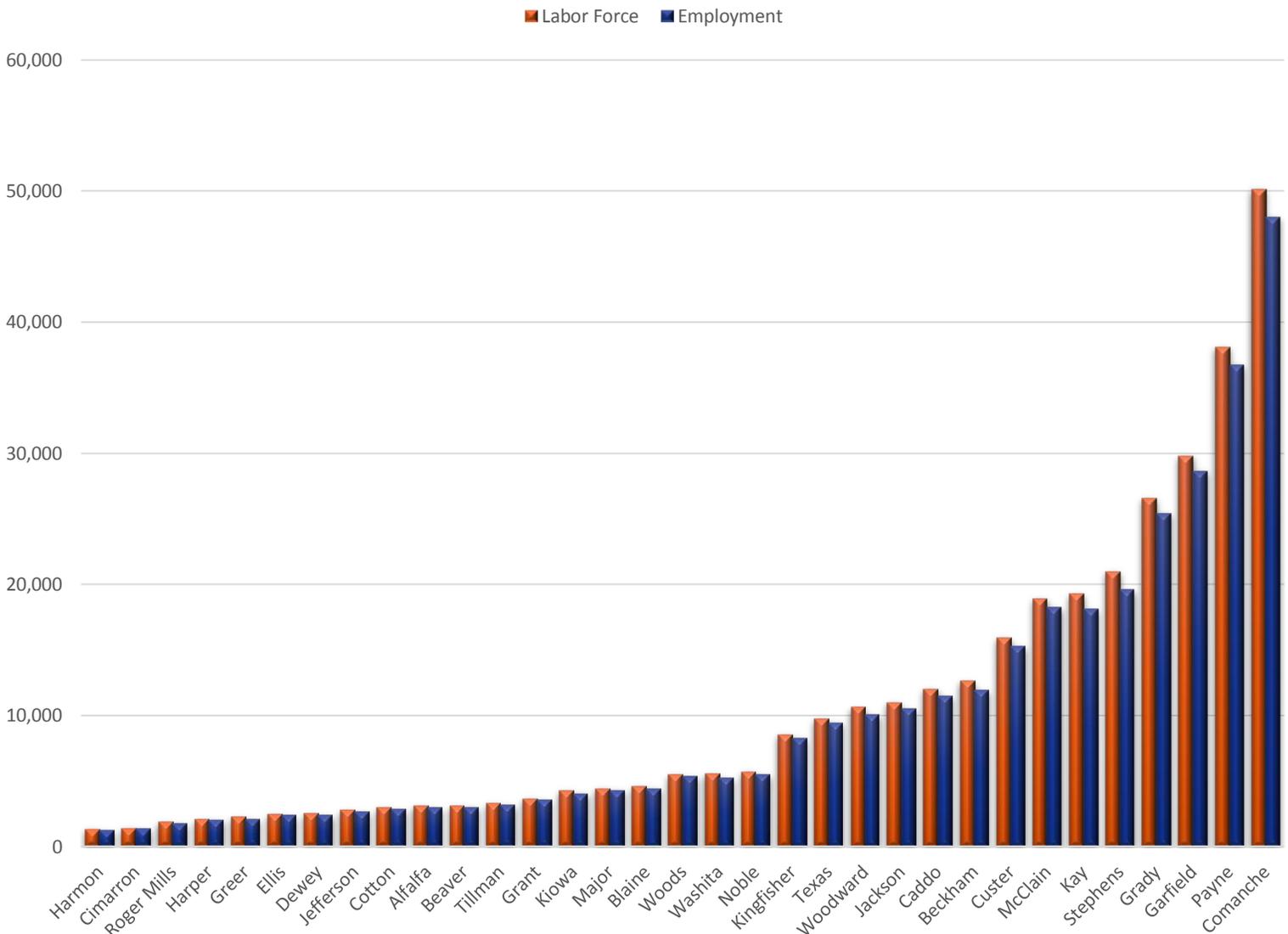
Five Year Unemployment Rate - Western Region, State, National



Total Employment:

- As of January 2016 there are 346,350 people in the Western Oklahoma Planning Region are in the labor force, and 331,350 are employed. That equates to 95.6% of the labor force in the region is employed.
- Comanche County possesses the largest population in the region, and has the largest labor force and largest number of people employed in the region. Payne County, has the second largest labor force and number employed.
- As a generality, Western Oklahoma counties tend to have higher employment rates than other counties in the state.

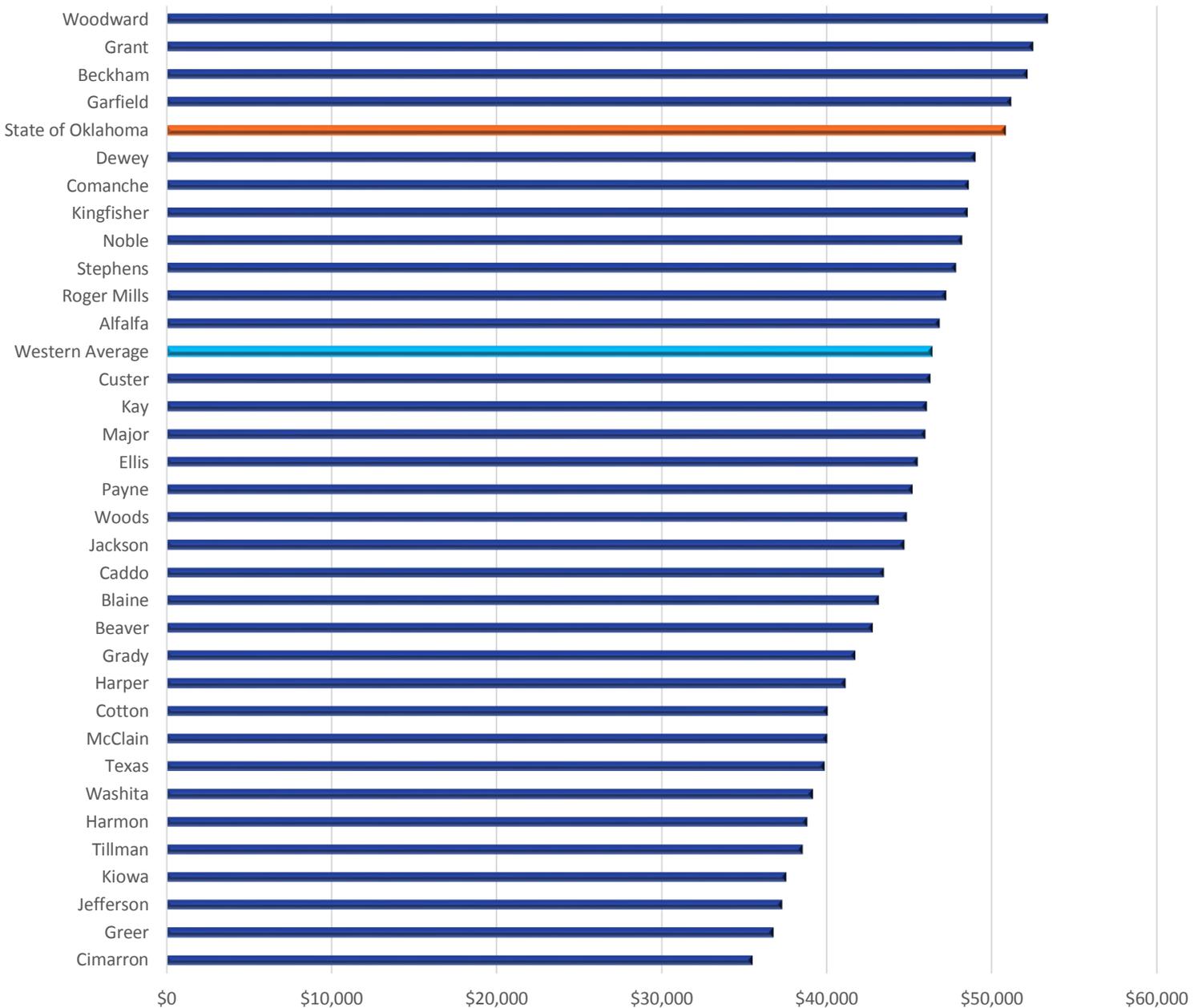
Total Employment by County in Western Oklahoma January 2016



Source: BLS; LAUS

Wages by County:

- The Western Oklahoma Planning Region average wage is \$46,370; this is less than the state average of \$50,825 by about \$4,450. The gap between the Western Oklahoma Planning Region counties and the state average ranges from \$2,520 more in Woodward County to \$15,370 less in Cimarron County.
- Woodward County has the highest wages in the region, higher than the regional average by about \$7,000 and higher than the state average by about \$2,520.
- Four counties in the region have average wages above the state average and eleven counties have average wages above the regional average.
- Cimarron County is the smallest county in terms of population and also has the lowest annual wage.



Source: EMSI 2016.1

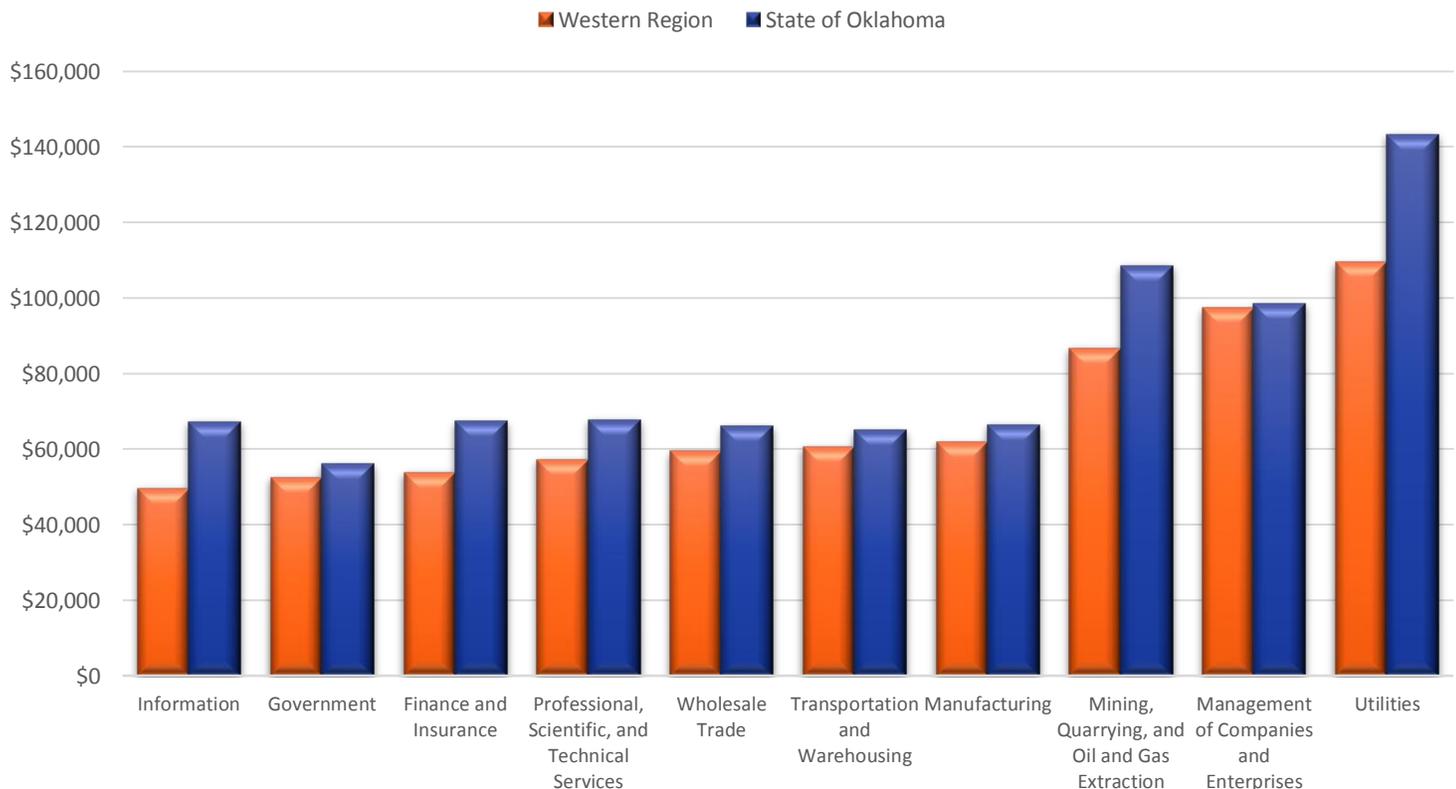
Top Industries in Western Oklahoma

Industry
Government
Retail Trade
Health Care and Social Assistance
Accommodation and Food Services
Manufacturing
Construction
Mining, Quarrying, and Oil and Gas Extraction
Other Services (except Public Administration)
Crop and Animal Production
Professional, Scientific, and Technical Services

Wages by Industry:

- All of the top Industry earnings in the State of Oklahoma average are higher than Western Planning Region averages. The largest wage difference occurs in the “Utilities” industry. Statewide this position earns \$33,760 more than in Western Oklahoma.
- The industries in Western Oklahoma that compare closest to state averages are, “Management” and “Government”.
- “Information” is the only industry in the region that earn less than the state of Oklahoma’s yearly average earnings of \$50,825.

Average Earnings by Top Industry in Western Region and Oklahoma



Ecosystems Impact in Western Oklahoma on Occupations and Salaries

The Oklahoma Department of Commerce identified five ecosystems in Oklahoma important to the economy to generate wealth, have employment growth potential, or where the state has a competitive advantage (Aerospace and Defense, Energy, Agriculture and Bioscience, Information and Financial Services, and Transportation and Distribution). In each ecosystem, there are critical occupations necessary for future growth and advancement. In addition to the five statewide ecosystems, there are ecosystems at the regional level important for regional economies.

Aerospace & Defense

Based on 2015 job numbers there are 22,700 jobs in the Aerospace & Defense Ecosystem in Western Oklahoma with average earnings of approximately \$58,600.

As a projection of demand by 2025, total employment in the Aerospace and Defense ecosystem will increase to 23,495 jobs in Western Oklahoma, an increase of 795 jobs for the region.

The list below encompasses some of the critical occupations for the Aerospace and Defense ecosystem in Western Oklahoma. However, these occupations are not solely intended to serve the Aerospace and Defense ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
55-9999	Military occupations	\$17.22	N/A
51-4121	Welders, Cutters, Solderers, and Brazers	\$15.99	Moderate-term on-the-job training
49-9041	Industrial Machinery Mechanics	\$26.81	Long-term on-the-job training
11-1021	General and Operations Managers	\$35.02	Bachelor's degree Source: EMSI 2016.1
15-1151	Computer User Support Specialists	\$18.41	Some college, no degree
15-1132	Software Developers, Applications	\$31.14	Bachelor's degree
49-3011	Aircraft Mechanics and Service Technicians	\$26.07	Postsecondary non-degree award
17-2051	Civil Engineers	\$32.36	Bachelor's degree
15-1131	Computer Programmers	\$26.41	Bachelor's degree
17-2141	Mechanical Engineers	\$34.58	Bachelor's degree

Source: EMSI 2016.1

As previously mentioned, the critical occupations above are necessary for the Aerospace & Defense ecosystem to thrive. Just as important, these critical occupations are necessary for other industries as well. Other industries that demand these occupations include: Federal Government, support activities for oil and gas extraction, oil and gas field machine manufacturing, and other manufacturing, among others in Western Oklahoma.

Energy

Based on 2015 job numbers there are 26,400 jobs in the Energy Ecosystem in Western Oklahoma with average earnings of \$85,000.

As a projection of demand, by 2025 total employment in the Energy ecosystem will grow to 32,420 jobs in Western Oklahoma, an addition of 6,020 jobs for the region.

The list below encompasses some of the critical occupations for the Energy ecosystem in Western Oklahoma. However, these occupations are not solely intended to serve the Energy ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
47-5071	Roustabouts, Oil and Gas	\$16.68	Moderate-term on-the-job training
53-3032	Heavy and Tractor-Trailer Truck Drivers	\$19.08	Postsecondary non-degree award
47-5013	Service Unit Operators, Oil, Gas, and Mining	\$19.59	Moderate-term on-the-job training
47-5012	Rotary Drill Operators, Oil and Gas	\$23.89	Moderate-term on-the-job training
47-1011	First-Line Supervisors of Construction Trades and Extraction Workers	\$25.88	High school diploma or equivalent
51-4121	Welders, Cutters, Solderers, and Brazers	\$15.99	Moderate-term on-the-job training
49-9051	Electrical Power-Line Installers and Repairers	\$23.12	Long-term on-the-job training
11-1021	General and Operations Managers	\$35.02	Bachelor's degree
47-2073	Operating Engineers and Other Construction Equipment Operators	\$17.35	Moderate-term on-the-job training
47-5011	Derrick Operators, Oil and Gas	\$19.15	Short-term on-the-job training

Source: EMSI 2016.1

As previously mentioned, these occupations are necessary for the Energy ecosystem to thrive. Just as important, they are necessary for other industries as well. Other industries that demand these occupations include support activities for oil and gas extraction, oil and gas construction, general freight trucking, and other oil and gas related occupations.

Agriculture & Bioscience

Based on 2015 job numbers there are 24,830 jobs in the Agriculture & Bioscience ecosystem in Western Oklahoma with average earnings of \$45,125.

As a projection of demand, by 2025 total employment in the Agriculture and Bioscience ecosystem will decrease to 23,970 jobs in Western Oklahoma, a loss of 860 jobs for the region.

The list below encompasses some of the critical occupations for the Agriculture and Bioscience ecosystem in Western Oklahoma. However, these occupations are not solely intended to serve the Agriculture and Bioscience ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
11-9013	Farmers, Ranchers, and Other Agricultural Managers	\$12.82	High school diploma or equivalent
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	\$13.89	Short-term on-the-job training
45-2093	Farmworkers, Farm, Ranch, and Aquacultural Animals	\$11.02	Short-term on-the-job training
45-2091	Agricultural Equipment Operators	\$13.73	Short-term on-the-job training
53-3032	Heavy and Tractor-Trailer Truck Drivers	\$19.08	Postsecondary non-degree award
51-3023	Slaughterers and Meat Packers	\$10.27	Short-term on-the-job training
51-3022	Meat, Poultry, and Fish Cutters and Trimmers	\$11.14	Short-term on-the-job training
51-9111	Packaging and Filling Machine Operators and Tenders	\$11.28	Moderate-term on-the-job training
11-1021	General and Operations Managers	\$35.02	Bachelor's degree
29-1131	Veterinarians	\$34.20	Doctoral or professional degree

Source: EMSI 2016.1

As previously mentioned, these occupations are necessary for the Agriculture & Bioscience ecosystem to thrive. Just as important, they are necessary for other industries as well. Other industries that demand these occupations include animal production, general freight trucking, and support activities for oil and gas extraction, among others in Western Oklahoma.

Information & Financial Services

Based on 2015 job numbers there are 13,540 jobs in the Information & Financial Services ecosystem in Western Oklahoma with average wages of \$62,050.

As a projection of demand, by 2025 total employment in the Information and Financial Services ecosystem will increase to 14,920 jobs in Western Oklahoma, an increase of 1,380 jobs for the region.

The list below encompasses some of the critical occupations for the Information and Financial Services ecosystem in Western Oklahoma. However, these occupations are not solely intended to serve the Information and Financial Services ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
43-3071	Tellers	\$11.18	Short-term on-the-job training
13-2072	Loan Officers	\$25.64	Bachelor's degree
13-2011	Accountants and Auditors	\$24.18	Bachelor's degree
43-3031	Bookkeeping, Accounting, and Auditing Clerks	\$14.05	Moderate-term on-the-job training
43-4131	Loan Interviewers and Clerks	\$13.46	Short-term on-the-job training
11-3031	Financial Managers	\$38.94	Bachelor's degree
15-1151	Computer User Support Specialists	\$18.41	Some college, no degree
49-2022	Telecommunications Equipment Installers and Repairers, Except Line Installers	\$21.39	Postsecondary non-degree award
13-2082	Tax Preparers	\$15.46	Moderate-term on-the-job training
41-3031	Securities, Commodities, and Financial Services Sales Agents	\$27.74	Bachelor's degree

Source: EMSI 2016.1

As previously mentioned, these occupations are necessary for the Information & Financial Services ecosystem to thrive. Just as important, they are necessary for other industries as well. Other industries that demand these occupations include commercial banking, consumer lending, universities, and accounting services, among others.

Transportation & Distribution

Based on 2015 job numbers there are 20,290 jobs in the Transportation & Distribution ecosystem in the Western Oklahoma Planning Region with average earnings of \$63,850.

As a projection of demand, by 2025 total employment in the Transportation and Distribution ecosystem will increase to 21,770, a gain of 1,480 jobs for the region.

The list below encompasses some of the critical occupations for the Transportation and Distribution ecosystem in Western Oklahoma. However, these occupations are not solely intended to serve the Transportation and Distribution ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
53-3032	Heavy and Tractor-Trailer Truck Drivers	\$19.08	Postsecondary non-degree award
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	\$11.19	Short-term on-the-job training
51-9041	Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	\$16.52	Moderate-term on-the-job training
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	\$24.84	Moderate-term on-the-job training
11-1021	General and Operations Managers	\$35.02	Bachelor's degree
53-3033	Light Truck or Delivery Services Drivers	\$13.14	Short-term on-the-job training
53-7051	Industrial Truck and Tractor Operators	\$14.15	Short-term on-the-job training
43-5081	Stock Clerks and Order Fillers	\$9.77	Short-term on-the-job training
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	\$17.46	Long-term on-the-job training
51-9197	Tire Builders	\$20.67	Moderate-term on-the-job training

Source: EMSI 2016.1

As previously mentioned, these occupations are necessary for the Transportation & Distribution ecosystem to thrive. Just as important, they are necessary for other industries as well. Other industries that demand these occupations include general freight trucking, support for oil and gas extraction, and general warehouse and storage, among others in the region.

Health Care (Regional Complementary)

Based on 2015 job numbers there are 33,840 jobs in the Health Care ecosystem in the Western Oklahoma Planning Region with average wages of \$45,270.

As a projection of demand, by 2025 total employment in the Health Care ecosystem will grow to 40,510 jobs in Western Oklahoma, an increase of 6,670 jobs for the region.

The list below encompasses some of the critical occupations for the Health Care ecosystem in Western Oklahoma. However, these occupations are not solely intended to serve the Health Care ecosystem, they are driven by demand and individuals with these work backgrounds will have transferable skills to other ecosystems.

SOC	Industry	Median Hourly Earnings	Education Level
29-1141	Registered Nurses	\$26.24	Associate's degree
31-1014	Nursing Assistants	\$10.21	Postsecondary non-degree award
39-9021	Personal Care Aides	\$8.66	Short-term on-the-job training
29-2061	Licensed Practical and Licensed Vocational Nurses	\$17.25	Postsecondary non-degree award
31-1011	Home Health Aides	\$9.26	Short-term on-the-job training
31-9091	Dental Assistants	\$16.59	Postsecondary non-degree award
31-9092	Medical Assistants	\$11.77	Postsecondary non-degree award
29-2052	Pharmacy Technicians	\$13.22	Moderate-term on-the-job training
11-9111	Medical and Health Services Managers	\$35.10	Bachelor's degree
29-1051	Pharmacists	\$51.96	Doctoral or professional degree

Source: EMSI 2016.1

As previously mentioned, these occupations are necessary for the Health Care ecosystem to thrive. Just as important, they are necessary for other industries as well. Other industries that demand these occupations include general and medical hospitals, physician's offices, nursing care facilities, and home health care services, among others.