



Veterans Inventory Initiative

Quarterly Report, Third Quarter, FY 2009

An assessment of the intentions, educational level, skills, employment desires, and suggestions to improve the Fort Hood region's "Quality of Place" for Soldiers leaving military service at Fort Hood, Texas.





Quarterly Report: 3rd Quarter, FY 2009
(April - June 2009)

A. BACKGROUND: Operation Economic Transformation is the Greater Killeen Chamber of Commerce plan to identify, measure, and capitalize on new and emerging economic development opportunities present in the Fort Hood region. One key recommendation was to regularly administer a survey designed to capture insightful information regarding the skills and desired career fields of veterans separating from military service at Fort Hood. In July 2006, the following parties entered into a Memorandum of Understanding (MOU) to routinely inventory the intentions, educational level, skills, employment desires, and suggestions of separating Soldiers in order to improve the Fort Hood regional “Quality of Place”:

- Fort Hood Adjutant General/Army Career and Alumni Program (ACAP)
- Workforce Solutions of Central Texas - Board
- Workforce Solutions of Central Texas - Service Centers
- Greater Killeen Chamber of Commerce
- Heart Of Texas Defense Alliance
- Texas Veterans Commission

Data is collected via a voluntary twelve-question survey administered during either the Transition Assistance Program (TAP) workshop or installation final clearance¹. The purpose for the collection and analysis of this data is threefold:

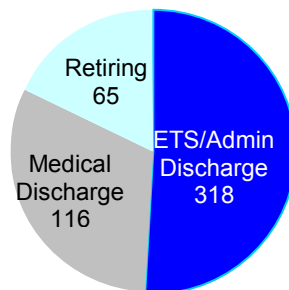
1. Develop and retain the region’s skilled and motivated military Veteran workforce;
2. Foster innovation and entrepreneurship; retain existing businesses, and attract new business to the region; and
3. Align the efforts of the participating agencies to enhance options for current and future/potential residents.

B. DEMOGRAPHICS

For the 3rd Quarter (April through June 2009):

1. 499 Soldiers completing their military service at Fort Hood responded to the survey.
2. 87 percent of respondents were leaving military service prior to becoming retirement-eligible (318 responses/37%), or were being medically discharged (116 responses/23%).
3. 13 percent (65 respondents) were retiring after 20 or more years of service.

DEMOGRAPHIC DISTRIBUTION



3rd QTR 2009

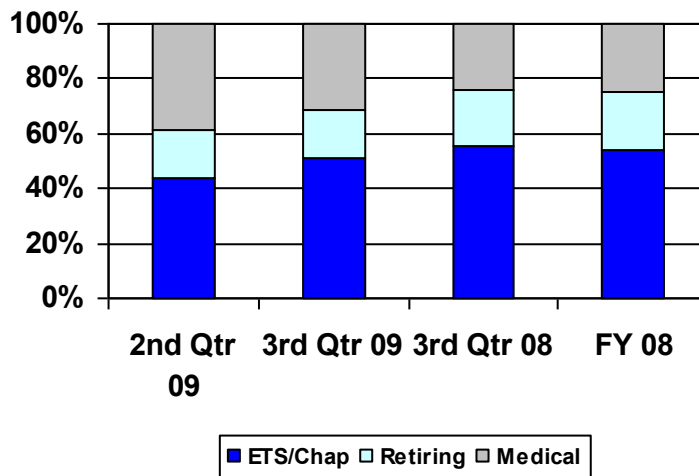
¹ Retiring Soldiers may participate in TAP up to two years prior to their retirement date, while non-retiring Soldiers may participate up to one year in advance. However, the Transition Services Manager reports the majority of soldiers attend the TAP workshop 6 months or less before separation.

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4. For the year-to-date for FY 2009 (October 2008 – June 2009)
 - a. 1807 Soldiers completing their service have responded to the survey.
 - b. 888 (49%) were in the category of ETS/Administrative discharge.
 - c. 615 (34%) were being medically discharged.
 - d. 304 (16.8%) indicated their intention to retire with 20-plus years of military service.

Percentages according to the reason cited for leaving the service by comparing 3rd Quarter 09 with 3rd Quarter 08 and fiscal year 2008 are as follows:



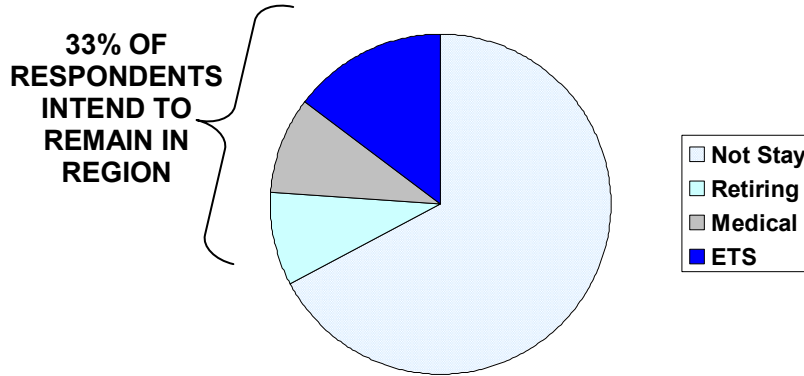
5. Trends. While the number of soldiers separating from the military due to medical discharge in FY 2009 had been increasing since FY 2008, there was a slight decrease this quarter compared to 2nd Quarter 2009. Creation of the Warriors In Transition Units (WTU) has resulted in more efficiencies in the medical evaluation process and has likely reduced the backlog of medical dispositions of soldiers assigned to the Fort Hood WTU.

C. INTENTIONS ON STAYING IN THE REGION: The respondents were surveyed regarding their intentions about remaining in the region (within 30 miles of Fort Hood – generally equating to the Temple-Killeen-Fort Hood Metropolitan Statistical Area) when their service ended.

1. 164 respondents (representing 33% of all respondents) indicated they intended to stay in the region. This data represents:
 - a. 45 retirees (69% of all retirement eligible respondents).
 - b. 119 (27.4%) non-retirement eligible respondents.
 - c. 108 (32%) of the 335 who responded they did not intend to stay in the region would do so if desirable employment were available.



INTENDING TO STAY IN THE REGION WHEN SERVICE ENDS



2. Conclusions. For the year to date (July 2008 – June 2009), a total of 833 Soldiers (32.6% of all respondents) leaving the service at Fort Hood indicate they intend to remain in the region once their service is complete. When comparing this to the current 3rd Quarter data (32.9%), it would appear that the number of Soldiers planning to remain in the Temple-Killeen-Fort Hood MSA region at the time of this survey remains consistent with the trend from the previous year. When comparing these percents with the data from July 2007 – June 2008 (35.5%), this shows that there has been a slight decrease at the time of the survey in the number of Soldiers intending to remain in the Temple-Killeen-Fort Hood MSA after leaving the service. However, because these surveys are completed up to a year before Soldiers actually leave the service, “intent” to remain (or leave) may change by the separation date.

However, for the past twelve months (July 2008 – June 2009), an additional 35.4 percent of Soldiers leaving Central Texas said they would stay if the respondent’s desired employment was available. This percent is a slight increase from July 2007 – June 2008 which was 33.4%. This data clearly demonstrates that desirable employment readily available within the MSA is a strong driving force in retaining Soldiers in this area following their service in the military. In addition, the total amount of Soldiers retiring from Fort Hood began to decrease beginning in Apr 2008 when the economy began to do poorly, yet the percent of retirees desiring to remain in the Central Texas region consistently averaged 65% from Apr 2007 – June 2009 with this quarter being slightly higher at 69%. We will continue to monitor this data in the future quarters. The survey data clearly indicates that the availability of desirable employment plays a major role in the intention to remain in the area.

3. While the Veterans Inventory Initiative only surveys the intent of Soldiers departing the service, it is possible to more accurately track the disposition of the retiring population using data from the Retired Army Personnel System, which provides the actual numbers of retired Soldiers to zip code level. For the third quarter in a row, the rate of growth for retirees in the Killeen-Temple-Fort Hood MSA increased slightly. From Feb 2008 to June 2009, the total number of military retirees grew by 6.8 percent in the Killeen-Temple-Fort Hood MSA. This is up slightly from the previous quarter report which reported a 6% increase in the MSA from Feb 2008 to Feb 2009. Once again, Killeen and Nolanville experienced growth rates exceeding the MSA average while Harker Heights trailed just behind the increasing MSA average. Based on the collected retiree data, the retiree growth rate in Nolanville has consistently averaged higher than the MSA since April 2007 whereas the retiree growth rate for Killeen has consistently

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averaged higher than the MSA since October 2007. As stated earlier, the collected data indicates that there are fewer Soldiers retiring which may be an indication of the economic conditions, yet the data shown below indicates the number of Soldiers who are actually retiring and living in Central Texas is increasing.

	FEBRUARY 2008	JUNE 2009	DIFFERENCE	% CHANGE
KILLEEN	7493	8120	627	8.4
COPPERAS COVE	2877	3028	151	5.2
HARKER HEIGHTS	1727	1843	116	6.7
TEMPLE	1093	1150	57	5.2
KEMPNER	844	884	40	4.7
BELTON	792	826	34	4.3
LAMPASAS	340	356	16	4.7
GATESVILLE	335	350	15	4.5
NOLANVILLE	242	266	24	9.9
SALADO	198	206	8	4.0
MSA	15941	17029	1088	6.8

The military retiree rate of growth for north Texas (174 counties less the Killeen-Temple-Fort Hood MSA) was 3.1 percent for the same period.

As reported above, the percentage of Soldiers intending to remain in the area stayed the same for the past year, yet as shown here, the amount of retirees living in the area actually increased. Because the survey is conducted up to two years before Soldiers actually retire, this growth could be the result of Soldiers changing plans of where they will reside after retirement or it could also be a result of previous retirees moving back into the Central Texas area after having lived somewhere else before. We will continue to monitor retiree data to determine the potential relationship between intent and the number of retirees that actually remain in the region. The survey data clearly indicates that the availability of desirable employment plays a major role in the service member's intention to remain in the area. In April 2008, the Texas Comptroller certified that the direct annual economic impact of military retirees and surviving annuitants in the Killeen, Temple, Fort Hood MSA (Bell, Coryell and Lampasas counties) equates to \$791.5 million.

Additionally, while the national economy was continuing to experience the effects of the recession during this reporting period, the Killeen-Temple-Fort Hood MSA was:

- a. the 14th fastest growing MSA in the nation (U.S. Census Bureau).
- b. ranked #1 in affordable housing (Caldwell Banker Home Price Index 9/26/2007).
- c. ranked #1 in renter livability (apartmentratings.com).
- d. rated one of the five best areas for military families (Babb Group - military.com)
- e. ranked 5th of the top 20 best MSAs for job growth (Forbes, citing Bureau of Labor Statistics).

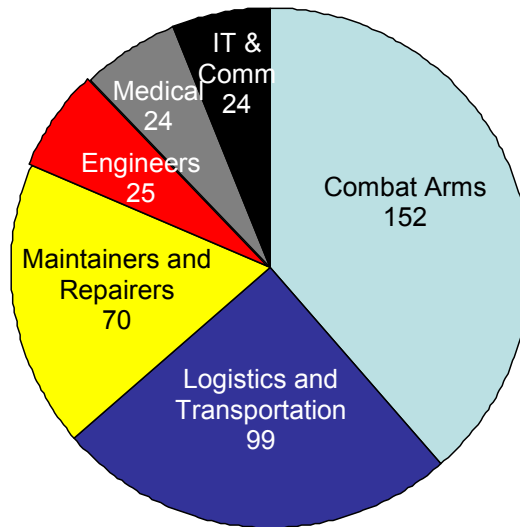
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f. Killeen-Temple-Ft. Hood MSA ranked as the fourth best employment outlook in the nation (Manpower Inc. poll released in March 2009).

g. Positive job market expected for Killeen-Temple-Ft. Hood MSA for 4th Quarter 2009 (Manpower Inc. press release Sept 2009).

D. MILITARY OCCUPATIONAL SPECIALITIES: Departing Soldiers represented 103 different Military Occupational Specialities. However, 83% (394 respondents) can be grouped into six general areas: Combat Arms, Logistics/ Transportation, Maintainers/Repairers, Engineers, Medical and Information Technology and Communications. Traditionally, the Quarterly Report only lists the top five MOS categories, but because the numbers were very close this quarter, the top six are being reported.



COMBAT ARMS

Given the types of units at Fort Hood (seven Brigade Combat Teams and one Fires Brigade at the time of this report) and deployment cycles, the number of Combat Arms Soldiers leaving the service is predictable. Most, if not all, will be combat veterans of the Iraq/Afghanistan campaigns, which have a distinctive small-unit focus by their nature. Therefore, in addition to the skills listed below, these Soldiers would likely have extensive leadership and staff planning skills that far surpass those of their civilian peers.

Soldiers in combat arms comprise 31.9 percent of the reported fields.

Armor (66)	Member or leader who employs main battle tanks or cavalry fighting vehicles in combat operations, and performs reconnaissance and security.
Infantry (46)	Member or leader who individually employs small arms/heavy anti-armor weapons in support of combat operations

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Field Artillery (34)	Operate or supervise high technology cannon artillery weapons, automated tactical data systems, intelligence activities, target processing, radar operations, artillery surveying operations, or meteorological observation
Air Defense Artillery (6)	Operate command/control/communications/computer information systems or the lightweight, highly mobile Avenger or medium weight Patriot Air Defense Missile systems.

LOGISTICS AND TRANSPORTATION

Soldiers serving in the logistics and transportation fields comprise 20.8 percent of reported fields.

Motor Transport Operator (24)	Supervises and operates wheel vehicles to transport personnel and cargo. Oversees and checks proper loading and unloading of cargo on vehicles and trailers.
Automated Logistical Specialists (19)	Supervise and perform management or stock record/warehouse functions pertaining to receipt, storage, distribution and issue, and maintain equipment records and parts.
Unit Supply Specialists (15)	Supervise or perform duties involving the request, receipt, storage, issue, accountability, and preservation of individual, organizational, installation, and expendable supplies and equipment.
Petroleum Supply Specialists (14)	Supervise the receipt, storage, accountability, and cares for dispensing, issuing and shipping bulk or packaged petroleum, oils, and lubricants.
Food Service Specialists (7)	Supervise or prepares, cooks and serves food in field or garrison food service operations.
Ammunition Supply Specialists (5)	Assists in receipt, storage, issue, maintenance, modification, destruction, and demilitarization of explosive items. Performs ammunition supply stock control and accounting duties using both automated and manual procedures.
Water Treatment Specialists (4)	Supervise or performs installation, operation of water purification equipment, water storage and distribution operations and activities.
Shower/Laundry and Clothing Repair Specialists (1)	Supervise or performs personnel laundry and shower operations and repairs personnel clothing and light textiles.

MAINTAINERS/ REPAIRERS

Soldiers that work in the field of maintenance and repair comprise 14.7 percent of the population.

Tracked Vehicle Mechanics (25)	Perform or supervise unit maintenance, diagnose, and troubleshoot malfunctions on gas turbine and diesel power plants; the suspension, steering, hydraulics, auxiliary power units, and the armament/fire control systems on tracked vehicles including the M1 Abrams main battle tank and Bradley Fighting Vehicle.
Wheeled Vehicle	Supervise and perform unit, direct support and general support level

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Mechanics (18)	maintenance and recovery operations on light and heavy wheeled vehicles, their associated trailers and material handling equipment.
Aviation repairers (15)	10 different enlisted specialties (less pilots and air traffic controllers) ranging from aircraft structural repairers to airframe-specific armament/electrical/avionics system repairers.
Special purpose (15)	10 different low-density fields that require a degree of technical skills that would support the repair and maintenance of Army vehicles and equipment. These skills include metal workers (welders), machinists, small arms and fire control repair, power generation and special purpose equipment (such as HVAC and refrigeration systems).

ENGINEERS

The engineer field makes up 5.3% of the fields reported.

Combat Engineer (18)	Engaged in providing mobility, counter-mobility and survivability support to combat forces. Operates, directs and assists in the operation of various light and heavy engineer wheeled and tracked vehicles. Directs construction of shelters and assembly of military fixed bridges.
Other (7)	1 Bridge Crew Members, 1 Construction Equip Operator, 1 Construction Management Engineer, 1 Interior Electrician, 2 Carpentry and Masonry Specialists

MEDICAL

Personnel in the medical field make up 5.0% of the reported fields.

Health Care Specialist (21)	Provide emergency medical treatment, limited primary care, force health protection, evacuation in a variety of operational and clinical settings from point of injury or illness through the continuum of military health care under the supervision of a physician, nurse or physician's assistant. As a field combat medic, provides emergency medical care/treatment at point of wounding on the battlefield or to battle and non-battle casualties during wartime .
Other (3)	1 Physician Assistant, 1 Nurse Anesthetist, 1 Pharmacy Specialist

INFORMATION TECHNOLOGY AND COMMUNICATIONS

The information technology and communications field makes up 5.0% of the fields reported.

Signal Support Systems Specialist (9)	Supervise, install, employ, maintain, troubleshoot and assist users with battlefield signal support systems, terminal devices, satellite communications equipment and automated telecommunications
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	computer systems, to include local area networks, wide area networks and routers. Integrate signal systems and networks; performs unit level maintenance on authorized signal equipment and associated electronic devices; train and provide technical assistance to users of signal equipment.
Nodal Network System Operator-Maintainer (5)	The Nodal Network Systems Operator-Maintainer supervises, installs, operates, and performs systems maintenance on large and small electronic switches; system control centers; node management facilities; associated multiplexing and combat net radio interface (CNRI) equipment; short range line of sight radio systems; communications security (COMSEC) devices; and other equipment associated with network switching operations.
Information Technology Specialist (4)	Supervise, install, operate and perform unit level maintenance on multi-functional/multi-user information processing systems, peripheral equipment, and associated devices. Perform analyst and information assurance functions and conducts data system studies. Perform Information Services Support Office (ISSO) duties of printing, publications, records management and Communication Security (COMSEC) custodian functions and certification authority duties in support of the Defense Message System (DMS).
Telecommunication Operations Chief (3)	The Telecommunication Operations Chief plans, coordinates, configures, directs, integrates, and supervises the installation, operation, maintenance, and management of telecommunications systems and networks including radio, switching, cable, automation equipment, and communication security devices. Oversees information systems support functions for command, control, communications, and computers used at all echelons of the Army. Develops and implements training programs for Signal personnel.

E. DESIRED POST- MILITARY SERVICE EMPLOYMENT: Respondents are asked to indicate the type (or types) of post-military employment they desire. In order to standardize input for ease of analysis, the survey provides 12 broad categories conforming to industry categories found in the North American Industrial Classification System (NAICS), but respondents may write in and/or amplify any area not listed. The data indicates for all respondents the top four categories of post-service employment desired are²:

² Employers desiring to hire Fort Hood veterans may post their job announcement on the ACAP website (www.acap.army.mil). Large employers with an employment website can post the URL on the ACAP website which will directly link to their employment website. Employers can also coordinate with the Fort Hood Transition Services Manager (Linda Christ at (254)288-6735) to arrange to recruit potential Veteran employees in person Tuesday through Thursday, and briefly address the TAP workshop (industry they represent, skills they are seeking, availability to discuss job opportunities.) Employers can place a job posting via “Work In Texas” (www.workintexas.com) – a statewide, internet-based job matching system through the Central Texas Workforce Center (254) 200-2020. The Texas Veterans Services staff work closely with the Central Texas Workforce Business Services including job development, direct referrals, and military skills-civilian occupations matching. Contact Jerry Butts (Killeen: (254)200-2026) or Eugene Hall (Temple: (254)773-1607, ext. 4032) for more information.

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SOLDIER

- 1. Law Enforcement: 151
- 2. Management: 127
- 3. Administrative: 98
- 4. Transportation: 91

SPOUSE

- 1. Medical: 79
- 2. Administration: 64
- 3. Education: 48
- 4. Management: 47

For only those respondents who are retirement eligible, the top categories of desired post-service employment are:

- 1. Administrative: 18 responses
- Management: 18 responses
- 2. Law Enforcement: 16 responses
- 3. Transportation: 14 responses
- Education: 14 responses

The anomalies in Military Occupational Specialty data may have been carried over to the types of post-service employment desired. Because of the higher number of Combat Arms respondents eligible to leave the military this quarter due to the redeployment cycles, Law Enforcement as a desired career after a military career remained the number one desired job as has traditionally been seen in the past quarters. Given the skills of the predominant Military Occupational Specialties (Combat Arms), a high rate of recent combat experience, and advanced educational attainment of the respondents, a wide range of possibilities available in the Law Enforcement area is apparently appealing. Because the second highest amount of Soldiers leaving the service this quarter had a Logistics and Transportation Military Occupation Specialty (MOS), it is not surprising that a large number of Soldiers would desire a job in the area of transportation after leaving the service.

For the fourth quarter in a row, Medical topped the list for spouse employment desired whereas it had consistently been the second desired career since October 2007. Retiring Soldiers listed Transportation as an area for post-service employment – the third time it has been listed since 1st Quarter 2008. Again, this is most likely a function of the high volume of respondents this quarter whose MOS was Transportation and Logistics. Education (tied with Transportation) remained one of the top choices after retirement.

Officers and Non-Commissioned Officers eligible to retire have spent many years leading increasingly larger and more complex organizations, are graduates of an Army Professional Education system that focuses on developing their leadership skills, and have demonstrated success as a result of their longevity of service. In most cases, their skills would include human resource development, supervision of large numbers of subordinates, fiscal planning, etc. Therefore, Management and Administration are areas of post-service employment that are consistent with their training and experience.

The *Operation Economic Transformation* Report identified four “target industries” or clusters that present the Greater Fort Hood Region with immediate opportunities for economic growth:

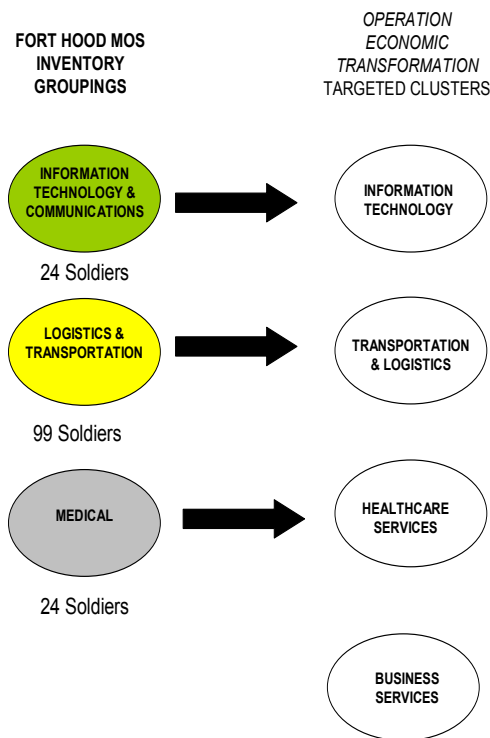
- Information Technology
- Transportation and Logistics

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Healthcare Services
Business Services

Clusters are geographic concentrations of interconnected firms and institutions utilizing related applications and serving similar markets. When fully developed, clusters can act as the principal drivers of economic growth and innovation in a region. The report recommended pursuing the development of these four clusters through a coordinated strategy of business retention, recruitment and entrepreneurship.



When separating the respondents into major MOS categories, the data directly correlates to these target clusters in the Operation Economic Transformation Report as shown in the chart above. In addition, because Officers and Non-Commissioned Officers eligible to retire have spent many years of their military career in leadership positions and are graduates of an Army Professional Education system, they have acquired many skills in Management and Administrative roles. This training and experience, regardless of their MOS, would directly correspond with the Business Services cluster.

F. EDUCATION LEVEL OF THOSE REMAINING IN THE REGION: Respondents were asked to indicate their highest level of educational attainment. Forty percent of all respondents indicated they had “Some College.” Eight percent had an Associates degree, 7 percent have a Baccalaureate degree, while 3 percent have a Masters degree.

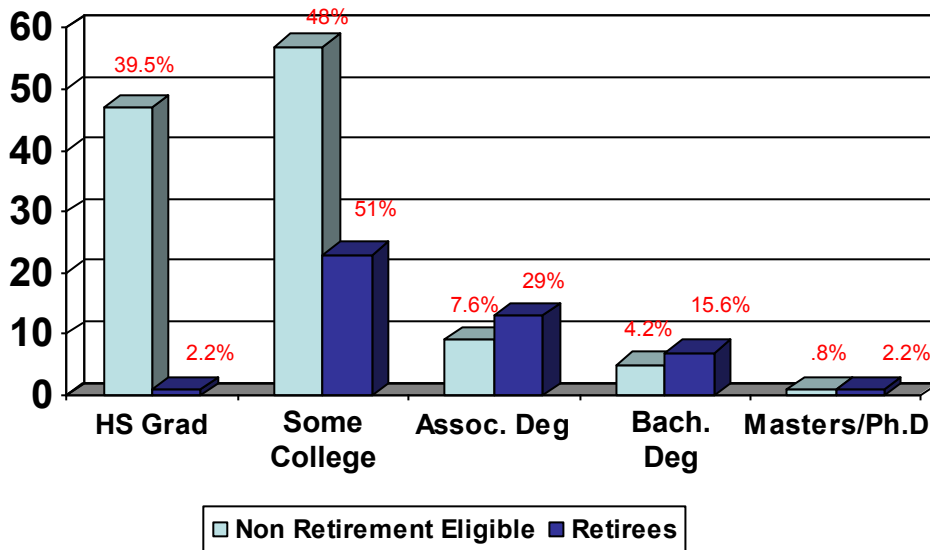


The data depicted below represents only the 164 respondents who indicated they intended to stay in the region upon completion of their service, and is separated by those eligible for retirement and those Soldiers leaving the service that are not retirement eligible.³

The data indicates that an overwhelming majority (97.8%) of retirement-eligible respondents who intend on remaining in the region have some post-secondary education. Fifty-one percent list their highest education level as “Some College”, and 29 percent have received their Associates degree. Sixty-one percent of non retirement-eligible Soldiers have a post-secondary education with 48 percent indicating they have “Some College.”

HIGHEST LEVEL OF EDUCATION ATTAINED

Soldiers REMAINING in the Region



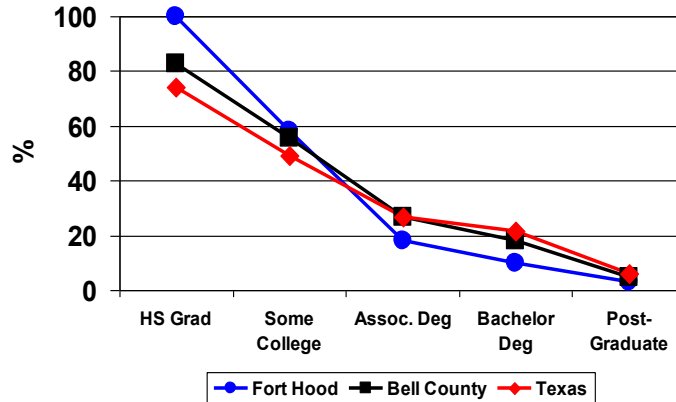
1. When the highest level of educational attained by Soldiers leaving the service at Fort Hood is expressed as a percentage of all respondents (rate of educational attainment) and compared to educational attainment for Bell County Texas and the state of Texas as a whole, the following comparison can be made⁴:

³ Data is for 45 retirees and 119 non-retirement eligibles;

⁴ Source: Texas Higher Education Coordinating Board; also cited on the Texas A&M University Real Estate Center – Market Overview 2008.



EDUCATIONAL ATTAINMENT COMPARISON



Generally, the data indicates Soldiers are better-educated than their civilian counterparts, both in the region and statewide. This is reflective of a high degree of self initiative and demonstrates that Soldiers willingly embrace the notion of lifelong learning. Continuing education is an important component to retention, and it is routine for Soldiers to perform in an increasingly sophisticated and technical operating environment in the execution of their duties. The creation of Texas A&M-Central Texas in May 2009 will provide additional opportunities for Soldiers pursuing (or finishing) baccalaureate degrees.

G. DESIRED “QUALITY OF PLACE” IMPROVEMENTS: An important consideration in retaining a talented military Veteran workforce in the Central Texas region upon their separation is how they perceive “Quality of Place.”

1. Respondents were asked to indicate the improvements they would desire (their perception of the Central Texas Quality of Place) in the general areas of higher education, retail shopping, health care, entertainment, child care, or “other” that would positively affect their decision to remain in the region. 26% listed higher education as the number one improvement needed in the area while 19% listed entertainment as a much needed improvement. Housing followed with 17%. Less than 10 percent of respondents listed retail shopping, health care and child care as Quality of Place factors they perceived needed improvement.

2. The most frequently recurring response was “other.” The survey affords respondents the opportunity to provide additional written comments, and the most often-noted areas respondents perceive needing improvement are:

- a. more pay/better jobs (30 comments)
- b. crime rate/ traffic/congestion (18 comments, of which 11 specifically commented that the crime rate was too high and there needed to be more security in the area)
- c. higher education (13 comments)
- d. family/community activities (12 comments, mostly citing a lack of children and family-oriented recreation and entertainment)



Note: The crime rate was cited as one of the top needs for improvement to the area, but as reported in the Killeen Daily Herald in August 2009, the crime rate in Killeen is on the decline. The 2009 crime report for Killeen showed a sharp decline in the number of murders as well as a decrease in violent crimes (aggravated assaults and robberies) by 19.3%. We will continue to monitor this response in regards to the crime rate needing to be lower now that it is actually on the decline. Higher education available in the area has always been another one of the top “other” reasons for desired improvement. After the 3rd Quarter responses were submitted, it was reported that the University of Mary Hardin-Baylor and Central Texas College improved in their rankings of colleges in the U.S. and Texas. In addition, Texas A&M-Central Texas (an upper level university) has now been established and we will continue to monitor this response on education as a desired improvement. Desired improvements for family/community activities remained one of the top “other” responses with the majority of responses specifically citing the need for more parks and entertainment geared towards children and families. Because a new water park – a seasonal entertainment option - opened this summer in Killeen, we will continue to monitor this response in regards to a need for more family entertainment.

3. Perceptions versus reality. Specific comments that separating Soldiers cite as desired improvements to the Central Texas “Quality of Place” remain consistent from previous reports. As 75 to 80 percent of Fort Hood Soldiers reside in the communities of Central Texas (98% within 10 miles of the Fort Hood main gate), the comments reflect their perceptions of areas where improvements might further influence their decision to remain in the region when their military service ends. As Operation Economic Transformation points out, “Economic development planning that is responsive to new opportunities...recognizes the increasing importance of quality of place in the attraction and retention of business and workers. Quality of place is about providing options, not just for current residents, but for those who will be residents in the future.” Veterans ending their service at Fort Hood are clearly a talented and educated workforce worth retaining in the Central Texas region, and their perceptions of Quality of Place improvements are important feedback to be considered in future planning. We will continue to monitor the responses for any significant changes in subsequent reports.

Additional information not addressed in this quarterly report may be available for release to eligible entities. Requests for specific information should be addressed in writing to Executive Director, Heart Of Texas Defense Alliance at 2916 Illinois Avenue, Killeen TX 76543.

Special thanks to Ms. Linda Angel for the design of the report cover and logo; and to Mr. Gerry Fluharty, Workforce Solutions of Central Texas, who compiles the data for these reports.