

Quarterly Report, April-June 2022

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



Quarterly Report: 3rd Quarter, FY 2022

(April-June 2022)

A. BACKGROUND: Operation Economic Transformation is the Greater Killeen Chamber of Commerce (GKCC) plan to identify, measure, and capitalize on new and emerging economic development opportunities present in the Central Texas region. In April 2006, the Greater Killeen Chamber of Commerce (GKCC) employed TIP Strategies, Inc. to conduct a study to identify, measure, and capitalize on the new and emerging economic development opportunities present in the Central Texas region. The results of their study were published in 2007.

One key recommendation from the study was to regularly administer a survey for veterans separating from military service at Fort Hood to capture insightful information regarding their skills and desired career fields post separation for all Soldiers and Spouses. In July 2006, the following parties entered into a Memorandum of Understanding (MOU) to routinely inventory the intentions, educational level, skills, and employment desires of separating Soldiers in order to improve the Fort Hood regional "Quality of Place":

- Fort Hood Soldier for Life-Transition Assistance Program (SFL-TAP)
- 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

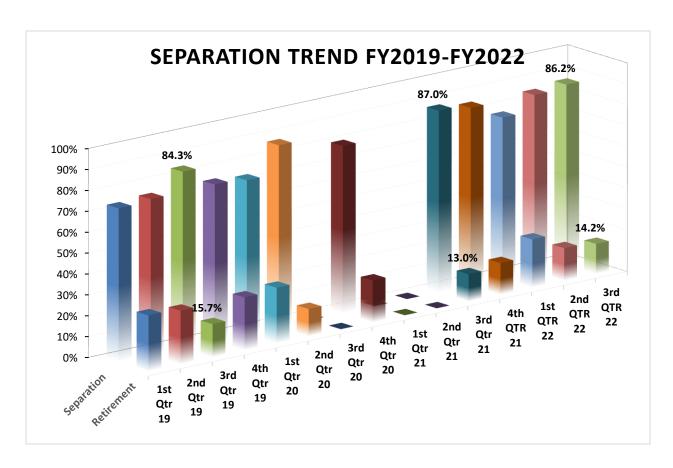
Data is collected via a voluntary digital ten-question survey administered during either the Soldier for Life - Transition Assistance Program (SFL-TAP) workshop or installation final clearance¹. The purpose for the collection and analysis of this data is threefold:

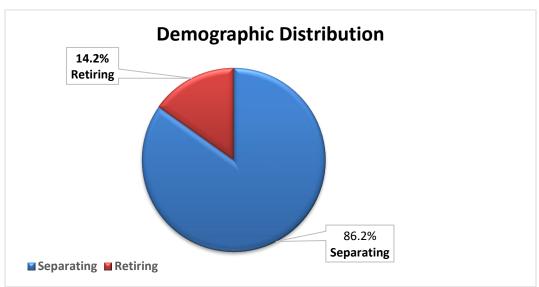
- 1. Develop and retain the region's skilled and motivated military Veteran workforce;
- 2. Foster innovation and entrepreneurship; retain existing businesses, and attract new business to the region; and
- 3. Align the efforts of the participating agencies to enhance options for current and future/potential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

B. DEMOGRAPHICS

1. For the 3rd Quarter FY 2022 (April-June 2022), 394 Soldiers completing their military service responded to the survey with the demographics graphed below. This number indicates a return to normal response rates pre-COVID 19 Pandemic and is comparable to previous 3rd Quarter survey results.

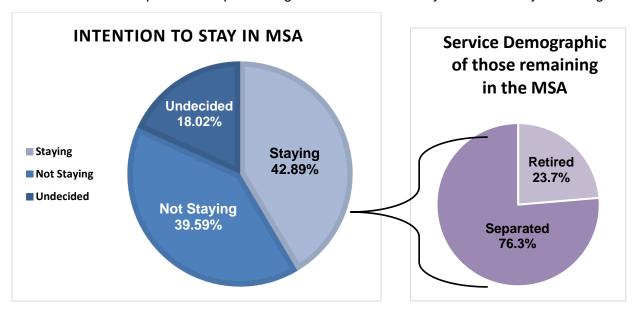
¹ Retiring Soldiers may participate in TAP up to two years prior to their retirement date, while non-retiring Soldiers may participate up to one year in advance. Effective November 2012, all Soldiers separating from the military are required to attend the TAP seminar and will provide the opportunity for more Soldiers to participate in the optional Veterans Inventory Initiative survey.



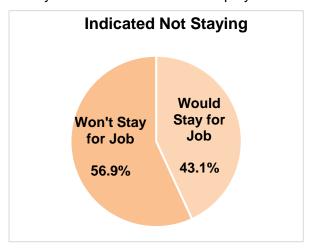


2. The Veterans Inventory Initiative has collected data on Soldiers separating from the service at Fort Hood since FY 2007 and reports have been based on responses from a total of 46,814 separating and retiring Soldiers. Using a new survey implemented in 2014, the amount of those separating from the service during the timeframe of January 2019 through September 2021 has fluctuated between 73%-87%, while the amount retiring has fluctuated between 13%-27%. Due to the COVID 19 pandemic, data was not available for 3rd QTR FY20, 1st QTR FY21, and 2nd QTR FY21.

- **C.** <u>INTENTION TO STAY IN THE REGION</u>: The respondents were surveyed regarding their intentions on remaining in the region (within 30 miles of Fort Hood generally equating to the Killeen-Temple-Fort Hood Metropolitan Statistical Area (MSA)) when their service ended. For this quarter, we received a total of 394 respondents in the following categories.
 - 1. 71 of 394 respondents representing 18.02% are listed as undecided.
- 2. 169 of 394 respondents representing 42.89% indicated they intended to stay in the region.
 - 3. 156 of 394 respondents representing 39.59% indicated they would not stay in the region.

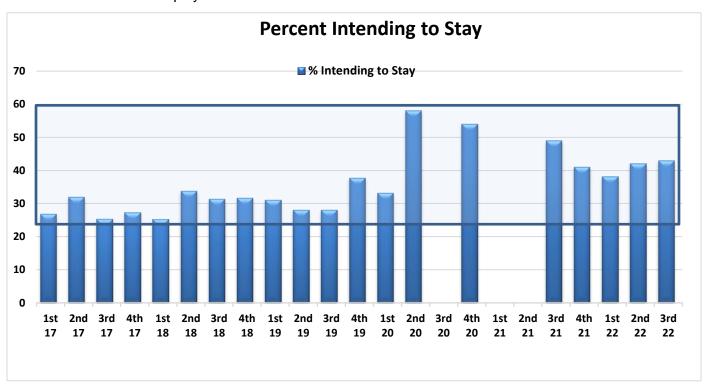


- 4. The 42.89% (169 out of 394) of those staying in the MSA represent two demographics: those retiring and those separating. The second graph above represents the percentages of those separating and those retiring since each group represent a different demographic seeking employment in the MSA.
- 5. The survey also asks respondents that do not intend to remain in the MSA if a job available in the area would change their response. Of those respondents leaving, 43.1% (97 of 225) indicated they would stay in the area if desirable employment were available.



D. <u>DEMOGRAPHICS OF THOSE INTENDING TO STAY IN THE REGION:</u>

- 1. When analyzing data of Soldiers' intentions on remaining in the Killeen-Temple-Fort Hood MSA over the last five years, the graph below indicates that the percent of Soldiers intending to remain in the area averaged 35.9% ranging between 25.2% and 58.6%. With the onset of COVID we saw an increase in the percentage remaining in the MSA for 2nd QTR FY20 (58%) and 4th QTR FY20 (54%). These spikes are likely a combination of impacts from the COVID 19 pandemic and a decreased number of surveys processed. However, it is also important to note that the numbers, according to the Retired Army Personnel System, show a continual increase in **retirees** remaining in the region throughout the past five years.
- 2. This quarter (FY22 3rd QTR) 42.9% (169 of 394) of our separating service members are deciding to call Central Texas home. Of the reasons provided, the responses are tied this quarter between the Central Texas quality of life and the ability for themselves/their significant others to find local employment.



3. Military retirees residing in the MSA. While the Veterans Inventory Initiative only surveys the <u>intent</u> of Soldiers departing the service, we are able to more accurately track the disposition of the retiring population using data from the Retired Army Personnel System (RAPS), which is based on the actual retired Soldiers' zip code. According to RAPS, the cities of Killeen, Harker Heights, Belton, Nolanville, Salado, and Temple experienced retiree growth rates larger than the MSA overall growth of 78.48% for the period June 2009 to June 2022.

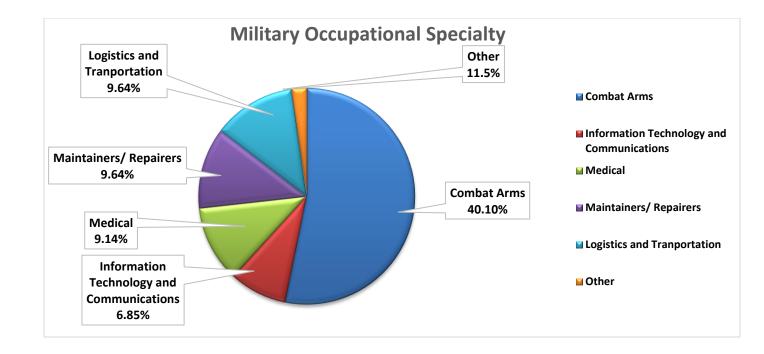
	JUNE 2009	JUNE 2022	% GROWTH 2009 – 2022
KILLEEN	8120	14,289	+75.27%
COPPERAS COVE	3,028	4,451	+46.82%

HARKER HEIGHTS	1,843	3,586	+95.06%
TEMPLE	1,150	2,437	+111.83%
KEMPNER	884	1,479	+66.52%
BELTON	826	1,911	+129.53%
LAMPASAS	356	552	+51.99%
GATESVILLE	350	656	+84.0%
NOLANVILLE	266	659	+143.98%
SALADO	206	513	+146.1%
MSA	17,029	30,533	+78.48%

- 4. In an economic impact study released in June of 2022, Texas Comptroller Glenn Hegar reported that more than 417,131 retirees, survivors, and their families remained within traveling distance of Fort Hood. While this number usually continues to grow each quarter with 70-90% of all local retirees remaining in the region and many others moving into the region due to Quality-of-Life factors, this quarter the number was 71.4% (40 of 56) of all retirees who completed the voluntary survey stated they planned to remain in the local area. Current estimates now show over 418,038 people are supported by Fort Hood locally and outside the MSA. Below are some key data points to provide additional insights into the growth rates locally:
- a. Texas A&M-Central Texas is in the Top 100 of Online Masters Programs according to the U.S. News and World Report. Texas A&M University-Central Texas received five awards for its online graduate programs from the U.S. News and World Report rankings for the best online programs. https://kdhnews.com/news/education/a-m-central-texas-recognized-for-masters-programs/article_16ecbf5a-37d8-11ea-ae48-8f18eb44f4aa.html, January 2019
- b. In 2022, Central Texas College was designated a Top 10 Military Friendly School by Viqtory based on a survey of academic results of over 1800 schools which ranked CTC as the #6 Community College in the nation. https://kdhnews.com/copperas_cove_herald/ctc-named-a-top-military-friendly-school/article_21231d28-a0c4-11ec-8074-2355915fcb92.html
- c. Killeen ranked number #101 out of the top 125 metro areas to live based on the U.S. News and World Reports study, "125 Best Places to Live in the USA." The study compared 125 metro areas in the U.S. based on quality of life and the job markets of each area, as well as value and desire to live in the area, https://patch.com/texas/across-tx/u-s-news-where-killeen-ranks-best-places-live, April 2019.
- d. According to Military Times, Killeen ranked 21 out of 234 medium-sized cities as "Best for Vets: Places to Live 2019. Three categories were used to compare all of the locations: 1) Veteran and military culture and services; 2) economic indicators; and 3) livability factors such as crime, health, school quality, and traffic, https://rebootcamp.militarytimes.com/transition/news/2018/09/10/best-for-vets-places-to-live-2019/, September 2018.
- e. According to CNN Money, the Texas military town of Killeen has nearly closed the home ownership gap between black and white resident homeowners with only a 14.5% difference. This makes Killeen the lowest racial homeownership gap in the country, and the area supports integration that many of the larger cities lack, http://money.cnn.com/2018/04/17/news/economy/kileen-texas-homeownership/index.html?section=money news economy&utm source=feedburner&utm me

<u>dium=feed&utm_campaign=Feed%3A+rss%2Fmoney_news_economy+%28CNNMoney%3A+Economy+News%29</u>, April 2018.

- f. According to the Texas Association of Realtors, Bell County ranked eighth out of ten for the total number of residents coming from out of state. According to the U.S. Census Bureau, this is the fourth straight year for an increase in residents moving to Texas from out of state, http://kdhnews.com/news/local/report-bell-county-among-top-destinations-for-new-texas-residents/article_7d7b52b2-0fa9-11e8-823c-67e0a141d1d4.html, February 2018.
- g. In June 2022, the Killeen unemployment rate was 4.7% compared with the Texas unemployment rate of 4.3%, http://www.deptofnumbers.com/unemployment/texas/killeen/, June 2022.
- h. Killeen ranked 7 out of 10 in the Value Index according to the U.S. News and World Report Best Places to Live study. Killeen's cost of living is lower than the national average of other large Texas metro areas with median home values and median monthly rental expenses. Because of this, Killeen residents are able to stretch their dollar further than residents of other major metro areas, and have easy access to the larger more expensive areas like Dallas-Fort Worth, Austin, and Houston, https://realestate.usnews.com/places/texas/killeen, February 2017.
- i. The Texas Transportation Commission approved the designation of 25 miles of US highway 190 in Bell County as a section of the new Interstate 14 which is part of the Interstate Highway System, and part of the new national Fort-to-Port strategic transportation system linking military facilities to deployment seaports, http://www.gulfcoaststrategichighway.org/, January 2017.
- j. The American Defense Communities (ADC) designated Fort Hood as one of the eight "Great American Defense Communities" across the United States for providing continuous support to its service members and their military families, http://www.hrmffa.org/images/Hampton-Roads-VA-GADC-2017-press-release.pdf, January 2017.
- k. Killeen was ranked number 20 overall out of 505 cities nationwide, and 4 out of 158 mid-sized cities for the most 2008 recession-recovered city based on 18 economic indicators including "inflow of college educated workers," "share of households receiving public assistance," and "home ownership rank".
- m. In addition to these indicators of economic stability for the Killeen-Temple-Fort Hood MSA, the Texas Comptroller also stated in the June 2022 economic report that Fort Hood's economic impact was \$28.9 billion statewide. Comptroller Glenn Hegar stated "Fort Hood is an economic engine that helps growth in Texas." The report states that Fort Hood is responsible for 55,374 direct jobs and total employment of 160,933 jobs throughout Texas.
- **E.** MILITARY OCCUPATIONAL SPECIALITIES: Departing Soldiers can represent over 100 different Military Occupational Specialties (MOS). 88.57% of the 394 responses to MOS question recorded) can be grouped into five (5) general areas: Combat Arms (40.10%), Medical (9.14%), Logistics and Transportation (9.64%), Maintainers/Repairers (9.64%), Information Technology and Communication (6.85%). The other represented series of job classifications are quantified within the 'Other' category representing 11.5% of Transitioning soldiers.



COMBAT ARMS

- 1. Traditionally, Combat Arms has been largest group. As we move out of large-scale military conflicts, we may see a rise in non-combat arms, or combat support, medical and administrative positions rise. Many will not 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 will likely have a broad leadership skillset and staff planning skills (soft skills) that would be a tremendous asset to any organization.
- 2. Soldiers in combat arms comprise 40.10% (158/394) of $3^{\rm rd}$ QTR 2022 transitioning population.

Infantry (46)	Member or leader who individually employs small arms/heavy anti-armor
	weapons in support of combat operations.
Combat Engineer (17)	Combat engineers supervise or assist team members traveling over rough terrain in combat situations. The combat engineer needs to be an expert in mobility, counter-mobility, survival, and general engineering. Their duties include building defenses to protect fellow troops and destroying obstacles. This may include building bridges, roads or airfields, as well as laying and clearing mines.
Cannon	This soldier loads and fires howitzers, sets fuse and charge on a variety
Crewmember (11)	of munitions, including high explosive artillery rounds, laser-guided
	projectiles, mines, and rocket assisted projectiles.
Cavalry Scout	The cavalry scout leads, serves, or assists as a member of scout crew,
(14)	squad, section, or platoon in reconnaissance, security, cordon/search,
	and other combat operations.
Other (70)	Soldiers with various Combat Arms specialty MOSs

INFORMATION TECHNOLOGY AND COMMUNICATIONS

- 1. The "Intel" Community are responsible for collecting, analyzing, and sharing vital information to combat soldiers concerning threat targeting, enemy manpower, and capabilities.
- 2. Soldiers that work in the Information Technology and Communications field comprise 6.85% (27/394) of 3rd QTR 2022 transitioning population.

Signal Support System Specialist (10)	Signal support systems specialists are responsible for battlefield signal support systems and terminal devices. Signal support specialists are part of the Army Signal Corps (USASC), which handles communications and information systems support for the combined armed forces.
Telecommunications Operations Chief (4)	The nodal network systems operator-maintainer is part of the Army's telecommunications team. Their primary responsibility is making sure communications are available, which is always crucial in the armed forces, especially during combat.
Information Technology Specialist (4)	Information Technology Specialists have the great responsibility of maintaining, processing, and troubleshooting military computer systems and operations.
Nodal Network Systems Operator and Maintainer (4)	The nodal network systems operator-maintainer is part of the Army's telecommunications team. Their primary responsibility is making sure communications are available, which is always crucial in the armed forces, especially during combat.

MAINTAINERS/ REPAIRERS

- 1. Maintaining the operational function of all machines in the arsenal of the Army is the job of this career field.
- 2. Soldiers that work in the field of Maintenance/Repair comprise 9.64% (38/394) of 3^{rd} QTR 2022 transitioning population.

Wheeled Vehicle Mechanics (15)	Supervise and perform unit, direct support and general support level maintenance and recovery operations on light and heavy wheeled vehicles, their associated trailers and material handling equipment.
Bradley Fighting Vehicle System Maintainer (6)	The Bradley fighting vehicle system maintainer handles the maintenance and repair of the M2/M3, A2/A3 Bradley fighting vehicle, the M6 Bradley linebacker air defense vehicle and the M-7 Bradley fire support team vehicle.
Power-Generation Equipment Repairer (4)	The power generation equipment repairer performs maintenance on tactical utility, precise power generation sets, internal combustion engines, and associated equipment

MEDICAL

- 1.Provide emergency medical treatment, limited primary care & health protection & evacuation from a point of injury or illness.
- 2. Personnel in the Medical Field make up 9.14% (36/394) of 3rd QTR 2022 transitioning population.

Combat Medic (27)	The Combat Medic Specialist provides 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 and, 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.
Biomedical Equipment Specialist (3)	These medics are responsible for servicing and maintaining all medical equipment.
Practical Nursing Specialist (3)	As a Practical Nursing Specialist, you'll provide the highest level of quality medical care to Soldiers and their Families by performing preventive, therapeutic, and emergency nursing care under the supervision of a physician, registered nurse, or non-commissioned Officer.
Other (3)	Soldiers with various medical specialty MOSs.

LOGISTICS AND TRANSPORTATION

- 1. The logistics and life's blood of the soldier falls onto the shoulders of the members of the Quartermaster Corps. Providing soldiers with food, water, petroleum, repair parts and other services during any operation is the job of the MOS of the Quartermasters.
- 2. Personnel in the Logistics and Transportation, make up 9.64% (38/394) of 3rd QTR Transitioning population.

Motor Transport Operators (9)	Motor transport operators in the U.S. Army have the important job of transporting cargo and personnel to strategic locations.
Petroleum Supply Specialist (7)	Supervise and manage the storage and shipping of bulk or packaged petroleum-based products.
Food Service Specialist (7)	Prepare and service food in field or garrison operations.
Automated Logistical Specialist (8)	The Automated Logistical Specialist is primarily responsible for supervising and performing management or warehouse functions to maintain equipment records and parts.

F. <u>DESIRED POST- MILITARY SERVICE EMPLOYMENT:</u>

Respondents are asked to indicate the type (or types) of post-military employment they desire. If married, they can indicate their spouse's employment preferences as well. In order to standardize input for ease of analysis, the survey provides 14 broad categories conforming to industry categories found in the North American Industrial Classification System (NAICS). The choice "other" is offered when a specific desired category is not provided. Because this survey is voluntary and can be taken up to a year before the date of separation during the Soldier for Life-Transition Assistance Program, it may be very possible that at the time of the survey, the majority just did not know what area of employment he/she would prefer. For this 3rd Quarter/report, of those who did respond to this question (394 Soldiers), the top five desired categories of post-military service employment were²:

SOLDIER

1. Skilled Trade: 19

• 2.Medical/Healthcare: 26

• 3.Transports/Distribution/Logistics: 16

• 4. Construction & Engineering :7

• 5. Information Technology: 40

SPOUSE

1. Education/Training :50

2. Skilled Trade:120

3. Administrative/Office:64

4. Management/Business:43

5. Medical: 44

3. Employment:

a. The Labor Market & Career Information Department (LMCI) of the Texas Workforce Commission provides a monthly snapshot of the area economy within the Texas labor market using statistics from the U.S. Bureau of Labor Statistics. This is broken down by industry profiles, and graphs the top ten groups consisting of seventeen different industries. This list can be compared to the Veteran's Inventory Initiative list of top desired employment after the service. The following list indicates the top ten industry profiles for the Killeen-Temple MSA according to the monthly Texas Labor Market Information - https://texaslmi.com/EconomicProfiles/MSAProfiles.

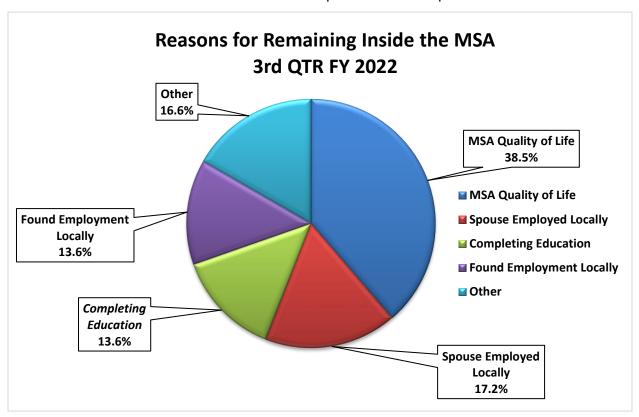
b. For comparison, the similar Veteran's Inventory Initiative categories are placed in parentheses. This list can be compared to the responses above for Soldiers' top desires for employment when retiring from their service in the military. We will continue to monitor and compare these reports in the future.

²Employers desiring to hire Fort Hood veterans should contact Fort Hood Soldier for Life -Transition Assistance Program (formerly known as ACAP) directly through TAP Mr. Adrian B Thompson: at (254)288-0827; adrian.b.thompson.civ@army.mil; or by posting their opportunity and company website URL on the TAP website (https://www.armytap.army.mil).

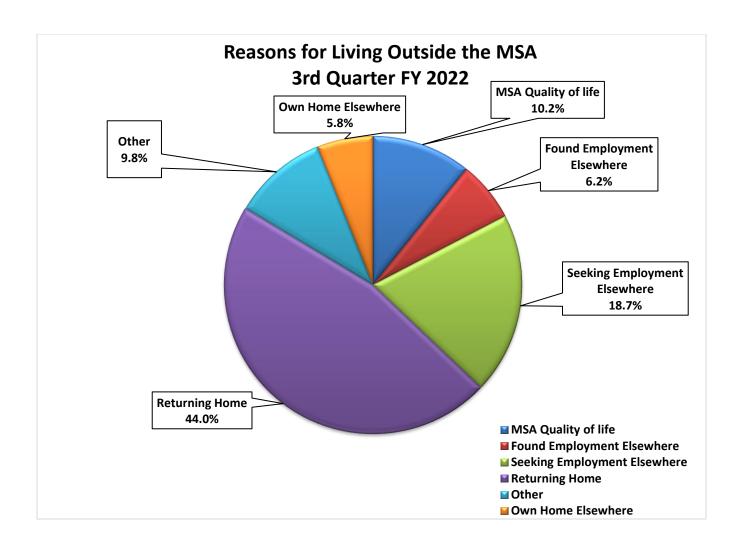
Employers may place a job posting via "Work in Texas" (www.workintexas.com) - a statewide, internet-based job-matching system through Workforce Solutions of Central Texas (WFSCT) (254) 200-2020. The Texas Veterans Commission (TVC) staff work closely with the Central Texas Workforce Business Services including job development, direct referrals, and military skills-civilian occupations matching. <a href="texas-upont-super-te

G. <u>REASONS FOR REMAINING IN THE MSA:</u>

1. In 2013, the survey was revised to gain more clarity on the Quality-of-Life factors cited by separating Soldiers that impact their decision to remain in Central Texas or go elsewhere after their service ends. The majority of those completing the survey that identified they were staying in the area said it was due to Quality of life. The second largest group staying was due to their spouse finding employment locally. The next largest groups staying have found employment locally, or Completing education. With the addition of Texas, A&M-Central Texas to the MSA, the Soldiers and their spouses now have the opportunity to complete their Bachelors or Master's degree while remaining in an area with a lower cost of living compared to other areas with universities. We will continue to monitor this response for future quarters.

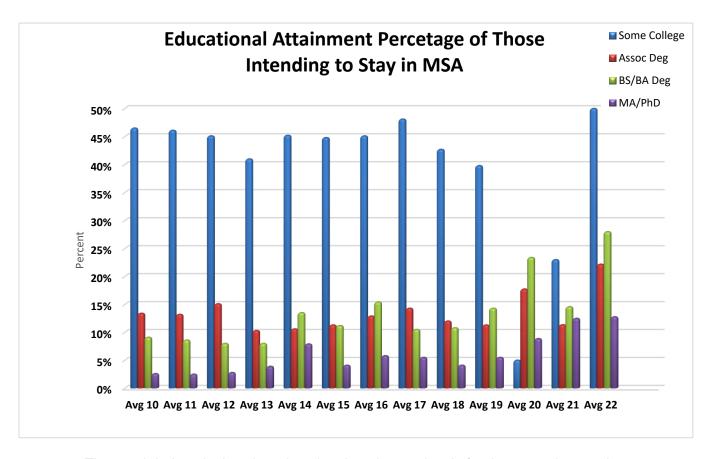


2. The graph below addresses the reasons for those service members not staying in the MSA after separation. The majority of those choosing to live outside of the MSA after separation wanted to return to their home of record, while the second largest group stated that they are seeking employment elsewhere. Returning home has been the primary reason for leaving the MSA since the inception of this survey. This quarter, the only change in the reasoning for leaving the MSA is to seek other employment rather than having necessarily obtained other employment. While returning to home of record is not something that can be improved for the area, available and desirable employment and the perception of the MSA quality of life are areas that can be improved.

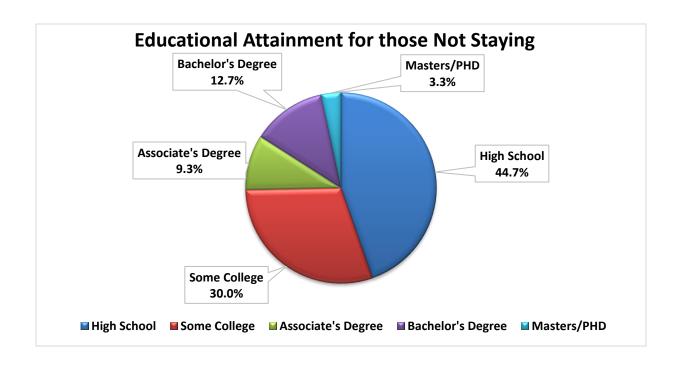


- **H.** <u>EDUCATION LEVEL OF THOSE REMAINING IN THE REGION:</u> Respondents are asked to provide their highest level of educational attainment. All soldiers have a High School Diploma/GED. For this quarter, 110 of 169 (65.09%) of the respondents who intend to remain in the region have some level of post-secondary education:
 - ❖ Some College 52 (30.8%)
 - ❖ Associates Degree 22 (13.0%)
 - ❖ Bachelor's Degree 30 (17.8%)
 - ❖ Masters/PhD Degree 6 (4.1%)

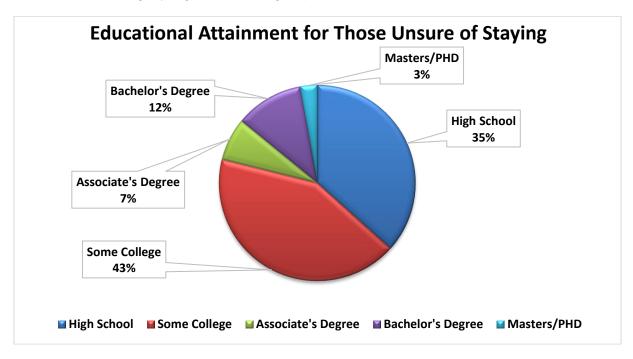
1. The data from over 55,000 Soldiers separating over the last decade indicates that for those Soldiers who intend to remain in the Killeen-Temple-Fort Hood MSA (both retirement eligible and non-retirement eligible), educational attainment for those completing the survey has increased for post-secondary degrees. Due to COVID 19 pandemic, there were less surveys processed in 2020 thru 2022, thus the data may not represent the most honed-in accuracy typically achieved during normal years. We will continue to monitor these results quarterly from those separating from the service. Traditionally with the availability of Texas A&M Central Texas as an area university of distinction, the numbers of those Soldiers pursuing post-secondary degrees has been higher than in the past before the opening of this area upper-level university. This data is further affirmation that those Soldiers leaving the service provide a solid foundation of education as well as real-world experience as future employees for the area.



2. The graph below depicts the educational attainment levels for those servicemembers not staying in the MSA and reflects lost opportunity for our area. This quarter 39.1% (154 of 394) of transitioning soldiers indicated they would not stay in the MSA.



3. A third dynamic includes the Soldiers who are unsure if they will stay in the MSA or depart. This quarter 18.02% (71 of 394) of transitioning Soldiers indicated they were unsure if they would remain in the MSA or depart. This group represents both workforce and economic potential that may be influenced to remain in the MSA. Their educational attainment level depicted below is slightly higher than the group that will not remain.



4. Anecdotally, businesses indicate they want to hire veterans. Educational attainment is a key variable in that process, given the current national unemployment rate. Due to extra

benefits of health care, tuition assistance, housing and food allowances while in the service, the military remains a favorable career choice. However, the standards of recruiting continue to be more stringent, so candidates applying to the military with a GED are accepted on an exception to policy basis. When taking into account that Central Texas offers a low cost of living, has several post-secondary educational institutions within the Killeen-Temple-Fort Hood MSA where Soldiers are able to complete their degrees, and the fact that a large percentage of Soldiers separating from the service desire to remain in the area, the Killeen-Temple-Fort Hood MSA is a very desirable region for potential business partners to relocate to the area. This opportunity would also likely motivate many other Soldiers who have started their degree as indicated in the above graph to complete their education through the use of their Post 9/11 GI Bill benefits, with the potential of satisfying employment in the area after leaving the service.

- 5. Perceptions versus reality: As 98% percent of Fort Hood Soldiers either reside on-post or within 10 miles of the Fort Hood main gate in the communities of Central Texas, the survey choices reflect their perceptions of areas where improvements might further influence their decision to remain in the region when their military service ends. Quality of Life within the MSA is important to retaining Soldiers in the area after separating, as seen in the previous graph on page thirteen. In addition, 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 the Quality of Life is important to be considered in future planning. While the Quality of Life is affected greatly by perception, bringing in larger industry and providing those employment opportunities is a strong way to make the Quality of Life in the MSA more desirable, helping to retain the Soldier and their family in the MSA.
- 6. 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 Dr. Linda Angel, Workforce Solutions of Central Texas, for the design of the report cover and logo; to Mr. Jared Porritt, Workforce Solutions of Central Texas, who compiles the data for these reports; and to Mr. Mark Phillips for administering the surveys at the SFL-TAP workshops.