
ROI
REGIONAL
OPPORTUNITY
INITIATIVES
INDIANA
UPLANDS
PROUD PARTNER



The Indiana Uplands Occupational Needs Assessment

Performed for: Regional Opportunity Initiatives (ROI)

Performed by: TEConomy Partners, LLC

May 2026

ROI REGIONAL OPPORTUNITY INITIATIVES

ROI REGIONAL OPPORTUNITY INITIATIVES

Advancing economic and community prosperity in the Indiana Uplands



Advancing Regionalism



Strengthening Industry Sectors



Developing Talent in STEM

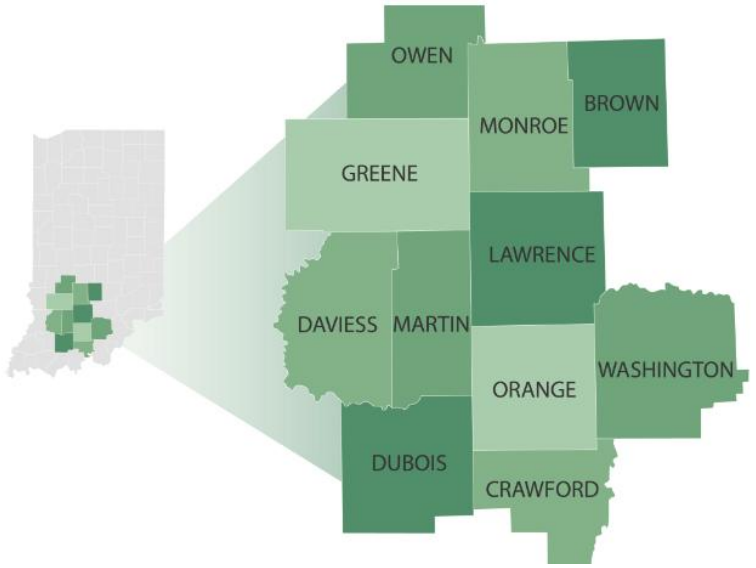


Enhancing Placemaking Assets

Regional Opportunity Initiatives (ROI):

Advancing regional economic and community prosperity through education, workforce, and quality of place

REGIONAL OPPORTUNITY INITIATIVES



The mission of ROI is to advance economic and community prosperity in the 11 counties of the Indiana Uplands (Brown, Crawford, Daviess, Dubois, Greene, Lawrence, Martin, Monroe, Orange, Owen, and Washington counties). ROI is growing potential and possibility through a focus on advanced industry sectors, regionalism, transformative school and workforce redesign, and placemaking strategies.

Project Purpose and Objectives

- Meeting the demand for talent across major industry clusters is a leading priority for economic development and sustained competitiveness in the Indiana Uplands Region.
- A predictable, robust workforce and talent pipeline is crucial for sustaining established regional firms and pursuing growth opportunities.
- **Understanding specific occupational and skill demand dynamics is critical for ROI in order to develop strategies to ensure employer needs are met, understand where and how to align regional talent supply and demand, and allocate resources.**
- This assessment examines:

Regional Cluster Performance, Talent Demands

Population, Demographic Trends Affecting Talent Supply

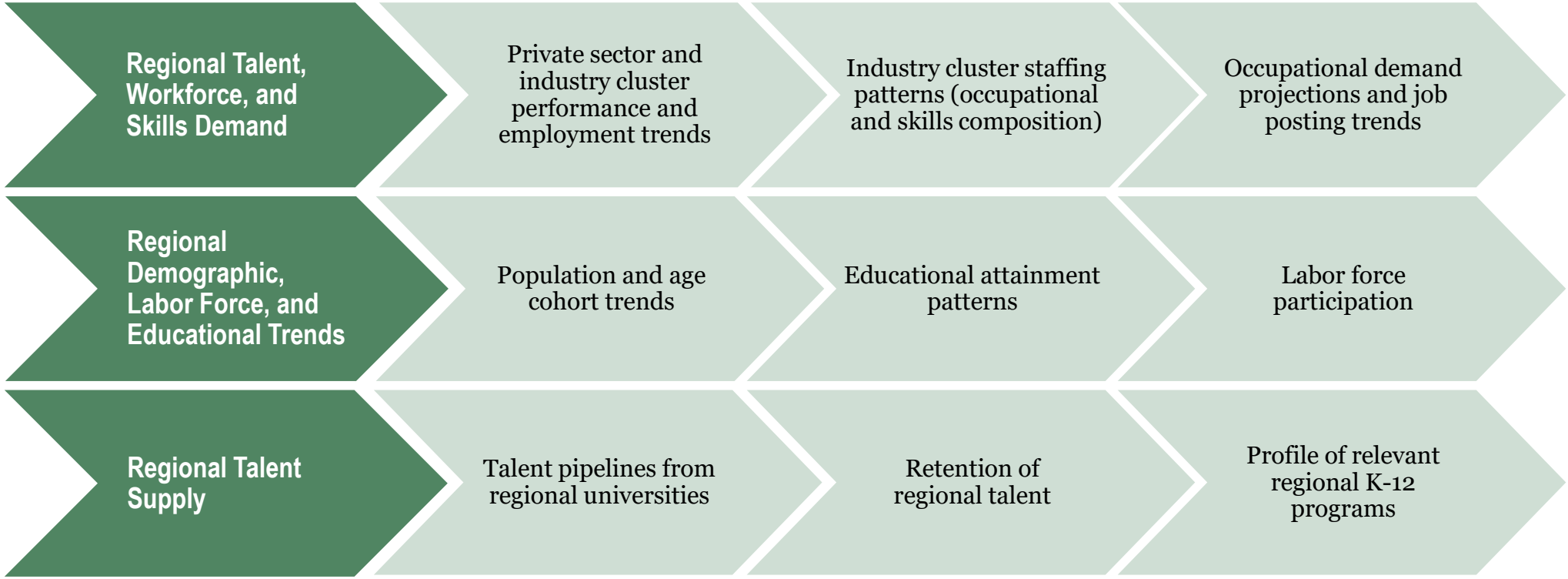
Workforce & Talent Supply

(Institutions, Training Programs, etc.)



Scope of Work

Data-Driven Demand Analyses Complemented by Cluster Interviews with Regional Executives



Indiana Uplands Targeted Industry Clusters

ADVANCED MANUFACTURING

- Automotive & Heavy Vehicle Equipment
- Food Processing & Manufacturing
- Furniture

LIFE SCIENCES

- Supporting regional companies in Pharmaceuticals; Medical Device Mfg.

NATIONAL SECURITY & DEFENSE

- Supporting efforts of NSWC Crane and associated industry partners

ADDITIONAL CLUSTER OF FOCUS: HEALTHCARE

Includes public and private hospitals as well as outpatient care providers/operations

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Separate Accompanying Documents:

- Narrative Executive Summary
- Appendix: Additional Reference and Methodology Slides



SECTION 1:
Talent, Workforce, and Skills Demand in Uplands Industry Clusters

Summary Profile of Industry Clusters in Uplands Region

The summary below outlines the recent economic performance of Uplands industry clusters, based on employment trends and regional concentrations (measured by location quotient or LQ). Shading indicates industry clusters that outperform U.S. growth trends or are highly specialized with an LQ >= 1.2.

Industry Clusters	2024 Employment	2024 Establishments	% Change Employment 2019-2024	% Change US Employment 2019-2024	% Change Employment 2021-2024	% Change US Employment 2021-2024	Location Quotient 2024
Total Private Sector	**125,522**	**8,915**	**2.0%**	**4.5%**	**4.0%**	**7.7%**	**n/a**
Advanced Manufacturing	14,179	217	-7.1%	3.9%	1.3%	5.6%	**3.88**
Life Sciences*	8,904	38	16.9%	14.1%	-3.1%	5.1%	**7.23**
National Security/Defense**	8,344	118	11.7%	5.5%	5.8%	2.2%	**1.84**
Healthcare	8,046	86	15.1%	7.2%	2.5%	7.5%	0.92

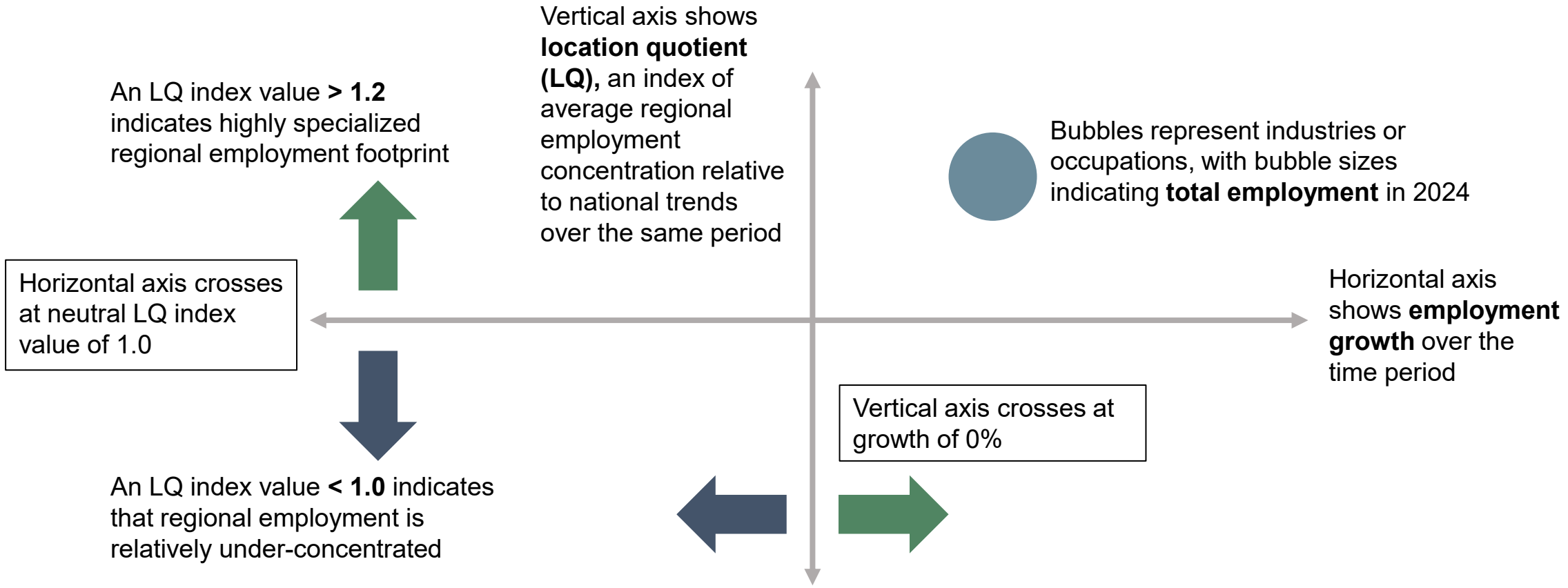
Source: TEConomy analysis of Bureau of Labor Statistics' QCEW data and Lightcast (Datarun 2025.2).

**** Life Sciences estimates are supplemented with data provided by Cook Medical** covering medical device-related employment that is classified by BLS in NAICS industries outside the Life Sciences cluster definition (see appendix for industry definition). This supplementary employment is assigned to NAICS 339112 – Surgical and Medical Instrument Manufacturing for the purposes of this analysis.*

***** Due to Lightcast data limitations for federal employment, estimates from BLS.gov are used for public sector defense employment, while Lightcast non-QCEW estimates are used for military employment and Lightcast QCEW estimates are used for private sector defense employment.***

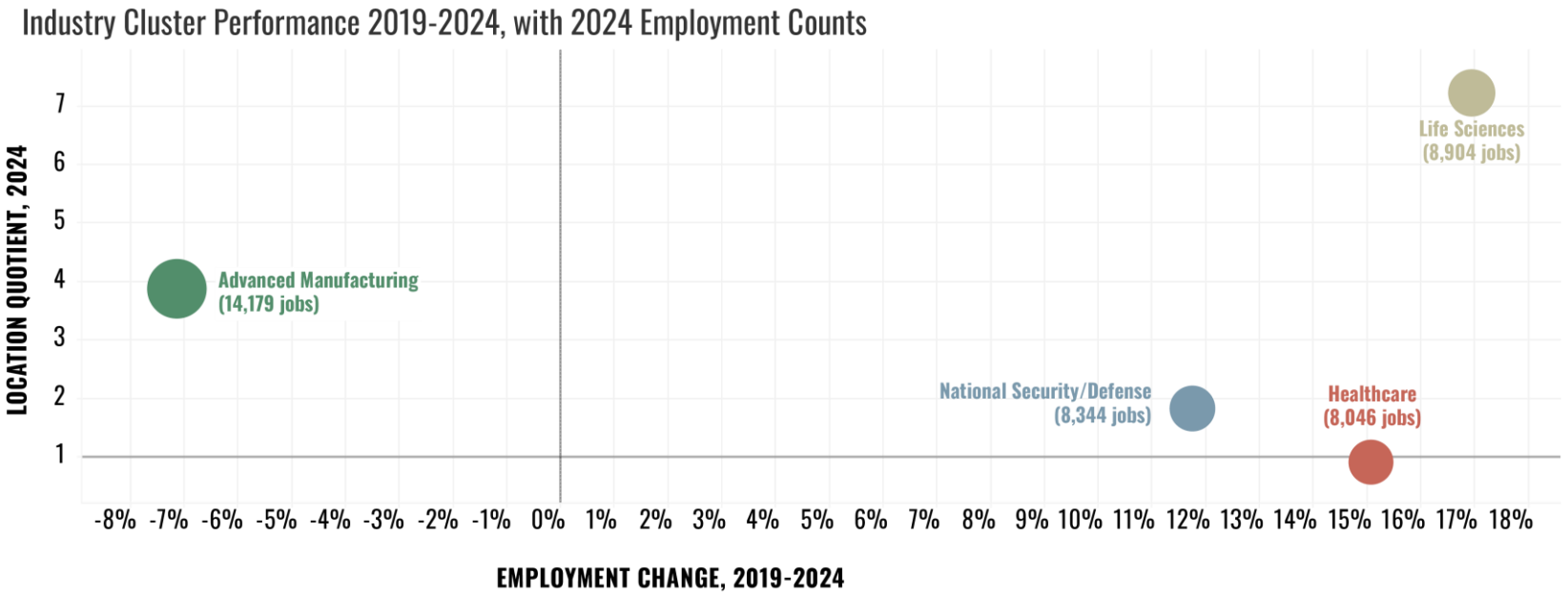
Note: 2024 Lightcast employment estimates are derived from BLS data releases for Quarters 1 through 2. At the time of analysis, full-year estimates were not available. Due to suppression of BLS data when the number of establishments in some industry codes is small, Lightcast estimates are used to ensure consistent tracking of the industry over time.

How to Read Detailed Industry Performance or Occupational Profiles Shown on Subsequent Slides



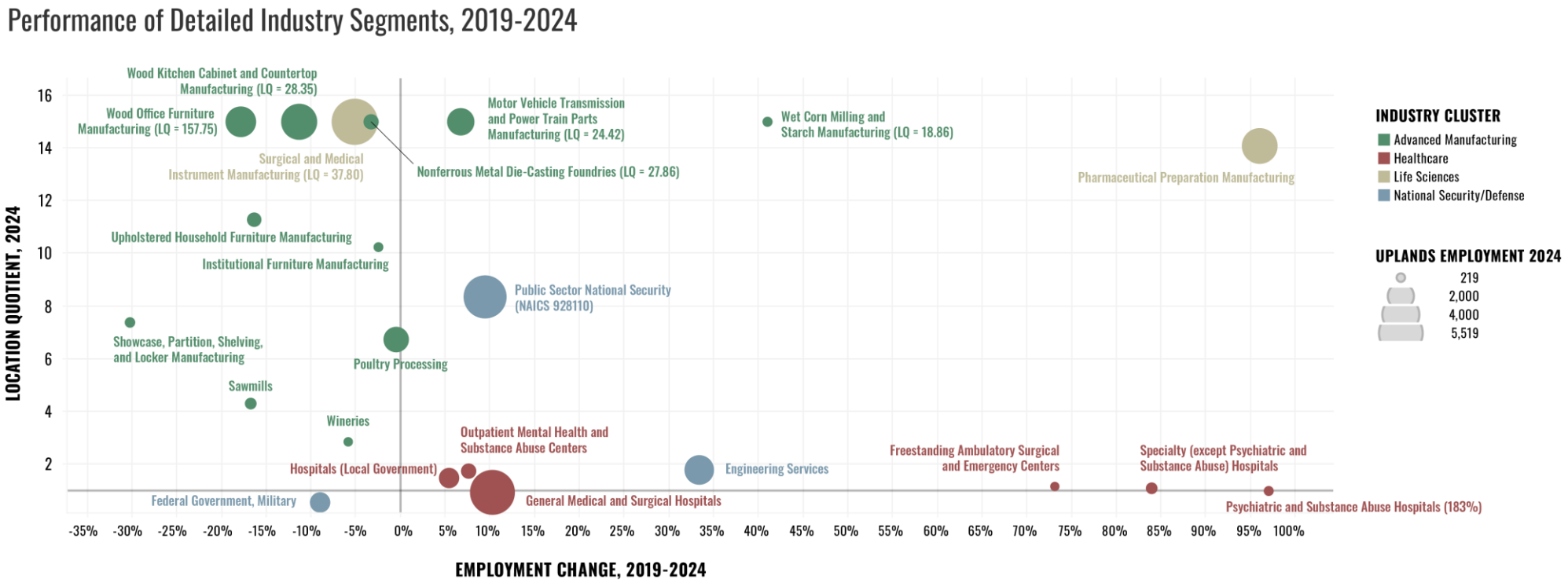
Life Sciences, Advanced Manufacturing, and National Security & Defense are Highly Specialized in their Concentration,

Although Advanced Manufacturing Has Seen a Net Employment Decline Since 2019



Source: TEConomy analysis of Bureau of Labor Statistics' QCEW data and Lightcast (Datarun 2025.2). Lightcast QCEW estimates are used for all private sector and state/local hospital employment, while Lightcast non-QCEW estimates are used for federal military employment and BLS.gov QCEW estimates are used for all other government employment.
Note: Life Sciences estimates are supplemented with data provided by Cook Medical covering medical device-related employment that is classified by BLS in NAICS industries outside the Life Sciences cluster definition (see appendix for industry definition). This supplementary employment is assigned to NAICS 339112 for the purposes of this analysis.
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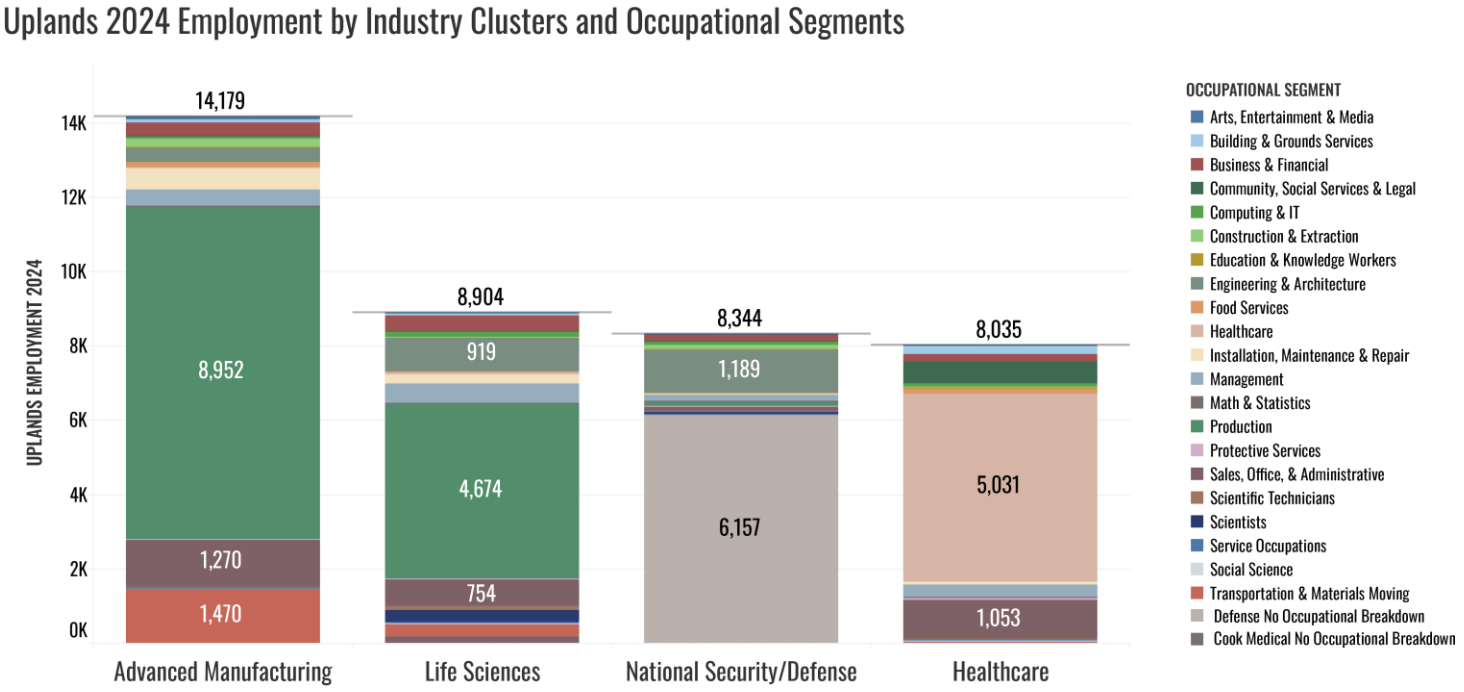
All Regional Industry Clusters Have At Least One Detailed Segment That Is Both Specialized and Growing



Source: TEConomy analysis of Bureau of Labor Statistics' QCEW data and Lightcast (Datarun 2025.2).
Note: Life Sciences estimates are supplemented with data provided by Cook Medical covering medical device-related employment that is classified by BLS in NAICS industries outside the Life Sciences cluster definition. This supplementary employment is assigned to NAICS 339112 for the purposes of this analysis.

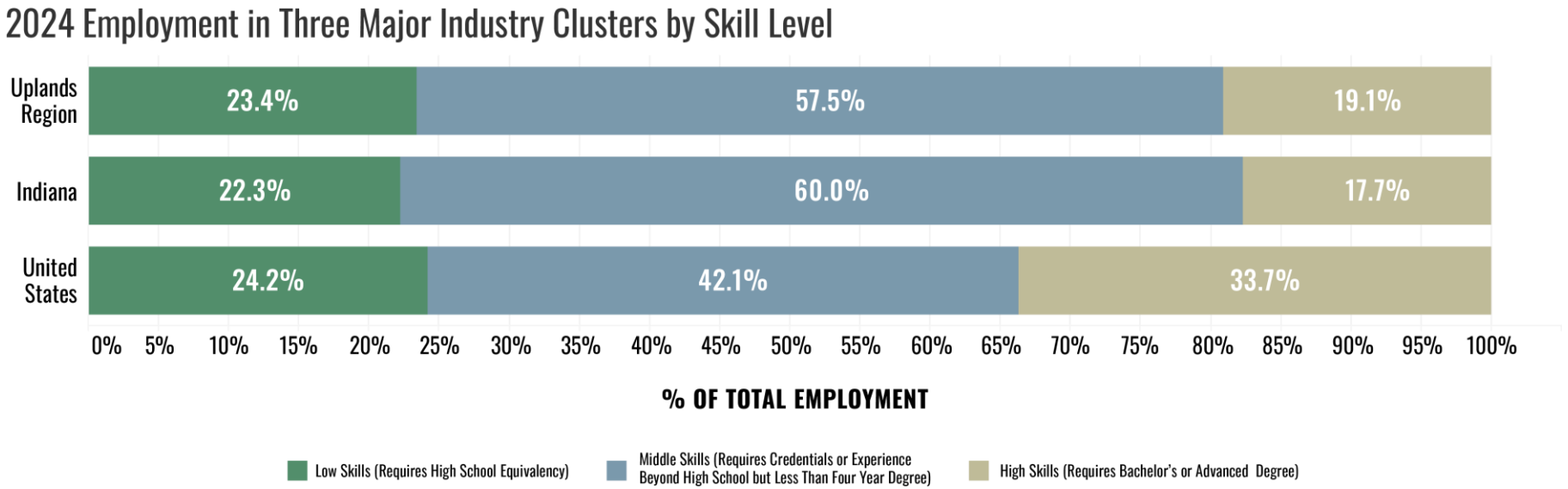
Uplands Workforce Dominated By Production Roles in the Advanced Manufacturing and Life Sciences Clusters, Engineering Roles in the National Security/Defense Cluster, and Healthcare Roles

- **Advanced Manufacturing employment is dominated by production occupations,** particularly general assemblers, specialized furniture makers, and low-skilled laborers.
- **Life Sciences employment is largely made up of generalized production occupations**, with a significant chunk in industrial and biomedical engineering.
  - Employment counts are supplemented with data provided by Cook Medical, but the occupational breakdown for most of this employment was not available in the data.*
- **Private civilian employment in the National Security/Defense sector is dominated by engineering occupations,** including civil, mechanical, and electrical engineers.
  - Occupational breakdown for federal defense employment is not available in the data.
- **Healthcare employment** primarily comprises care provider roles** such as nurses, nursing/medical assistants, and medical technicians, as well as administrative and managerial jobs.



Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.
** Staffing patterns analysis includes NAICS 326199 - All Other Plastics Product Manufacturing to approximate the occupational breakdown of Cook Polymer Tech (CPT) employment figures, but staffing patterns data is not available for other supplementary employment provided by Cook Medical.*
*** Since occupational breakdowns are not available for federal hospitals, their employment is excluded from staffing patterns analysis. This totals only 11 missing employment counts in the Healthcare cluster.*

The Uplands Region's Industry Cluster Occupational Workforce is Driven by "Middle Skills" Jobs Requiring More Than a High School Education but Less Than a Four-Year College Degree



Uplands Healthcare industry employment consists of over 47% high skills roles, slightly lagging but similar to state and national shares.

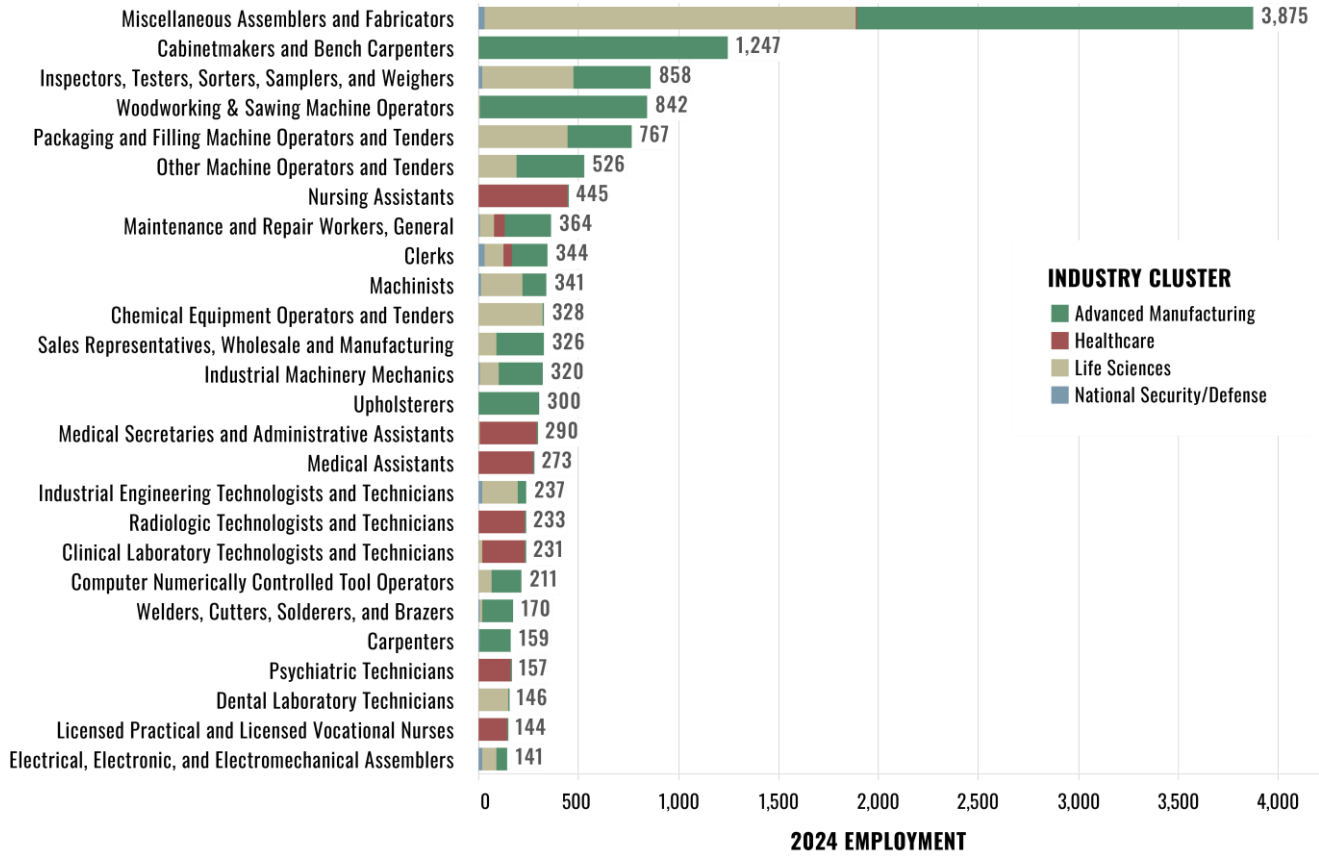
Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.
Note: Analysis includes NAICS 326199 with the baseline Life Sciences industry definition to approximate the occupational breakdown of Cook Polymer Tech (CPT) employment figures provided by Cook Medical.
Note: Lightcast staffing patterns data does not include military, public sector defense, federal hospital, or supplementary employment figures provided by Cook Medical other than the CPT approximation.
Note: 2024 employment estimates are derived from BLS data releases for Quarters 1 through 2. At the time of analysis, full-year estimates were not available. Due to suppression of BLS data when the number of establishments in some industry codes is small, Lightcast estimates are used to ensure consistent tracking of the industry over time.

Leading Middle Skills Occupations in Uplands Industry Clusters Include Furniture Production Roles, Machine Operators and Other Production Occupations, and Healthcare Assistant Roles

Leading middle skills occupations and their post-Covid growth rates include:

- Generalized production and machine operator occupations, mostly split between Advanced Manufacturing and Life Sciences **(average 12% growth)**
- Furniture production occupations **(average -1% decline)**
- Nursing, medical, and administrative assistant occupations in healthcare **(average 19% growth)**
- General maintenance and repair workers **(-3% decline)** and industrial machinery mechanics **(16% growth),** mostly in Advanced Manufacturing and Life Sciences
- Various technologists and technicians across all clusters **(average 49% growth)**
- Sales representatives in Advanced Manufacturing and Life Sciences **(-8% decline)**

Growth rates for 2021-2024 were calculated using an annual average.



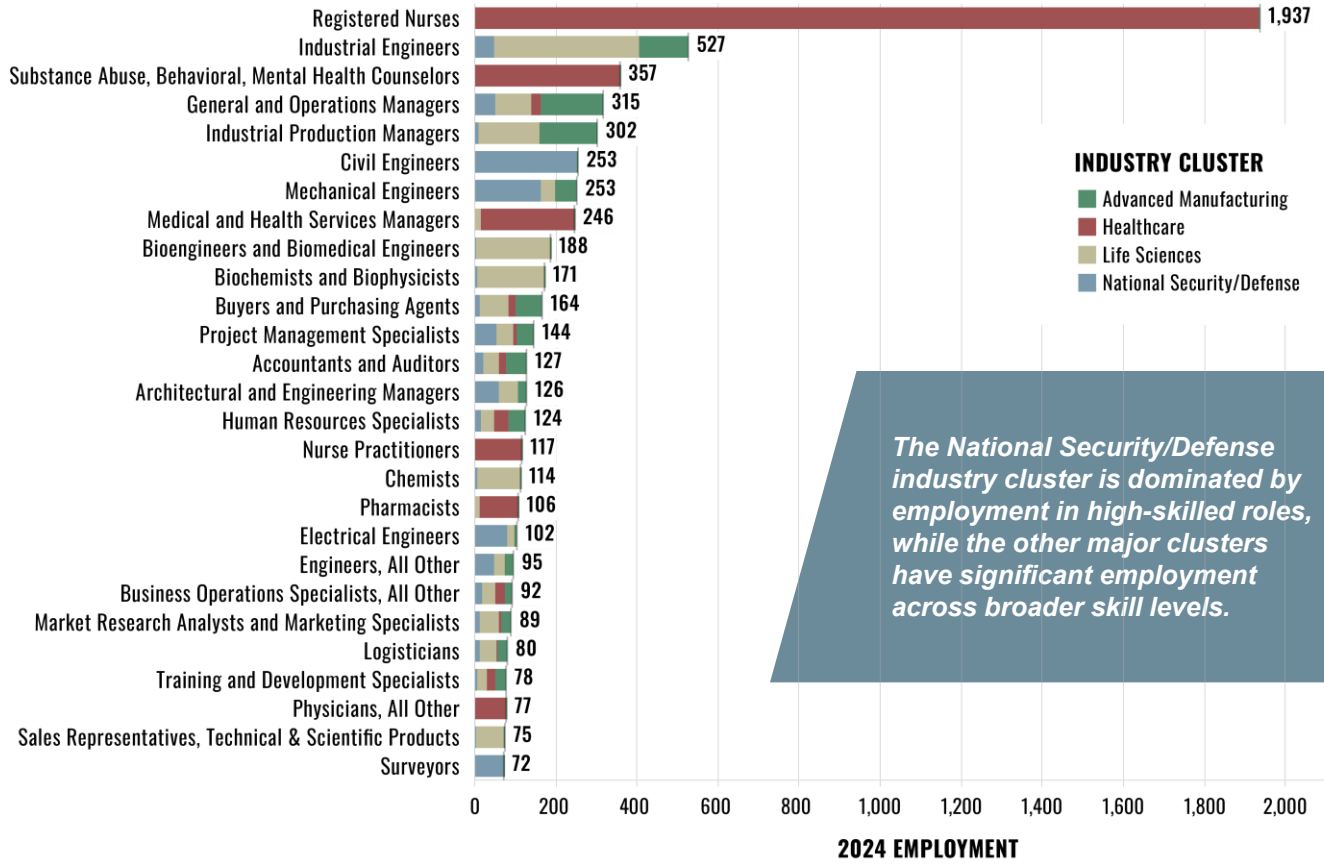
Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.
Note: Analysis includes NAICS 326199 with the baseline Life Sciences industry definition to approximate the occupational breakdown of Cook Polymer Tech (CPT) employment.
Note: Lightcast staffing patterns does not include military, public sector defense, federal hospital, or supplementary Cook Medical employment other than the CPT approximation.

Leading High Skills Occupations in Uplands Industry Clusters Include Healthcare Provider Roles, Engineers, Industrial Managers, and Business Specialists

Leading high skills occupations and their post-Covid growth rates include:

- Healthcare occupations such as registered nurses, counselors, managers, pharmacists, and physicians **(average 12% growth)**
- Industrial engineers **(-10% decline)** and industrial production managers **(18% growth)** distributed among Advanced Manufacturing and Life Sciences, as well as National Security to a lesser extent
- Additional engineering occupations such as civil and mechanical engineers primarily in National Security, and bioengineers mostly in Life Sciences **(average 14% growth)**
- General and operations managers **(-16% decline)** and project management specialist roles **(27% growth)** across all four industry clusters
- Business operations and logistics roles across all four industry clusters **(average -1% decline)**
- Scientist occupations primarily in Life Sciences, led by biochemists and biophysicists **(362% growth)** and chemists **(-18% decline)**

Growth rates for 2021-2024 were calculated using an annual average.



Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.
Note: Analysis includes NAICS 326199 with the baseline Life Sciences industry definition to approximate the occupational breakdown of Cook Polymer Tech (CPT) employment.
Note: Lightcast staffing patterns does not include military, public sector defense, federal hospital, or supplementary Cook Medical employment other than the CPT approximation.

Methodology for Identifying “High-Priority, High-Demand” Occupations in the Uplands Region

Subsequent slides include tables with top occupations across the region overall and within each major industry cluster, based on the following metrics (with ✓ indicating strength in a given metric):

LARGE JOBS BASE	Jobs are listed in descending order of regional employment counts, and occupations with the highest employment are indicated in order to give priority to high-volume roles.
HIGH SPECIALIZATION	Occupations with high specialization, indicated by a location quotient index value over 1.2, highlight roles with regional employment at least 20% more specialized than US averages.
POSITIVE RECENT GROWTH (2019-2024)	Occupations experiencing employment growth since 2019 indicate roles with increasing importance and demand in the region.
SIGNIFICANT PROJECTED OPENINGS OR RESKILLING	Occupations with high projected job openings and reskilling needs over the next decade indicate high future demand and signal priority areas for workforce development.
SIGNIFICANT PRESENCE IN RECENT JOB POSTINGS	Occupations with a large volume of job postings since 2021 indicate significant recent regional demand.
SUPPORT FOR MULTIPLE INDUSTRY CLUSTERS	In the table listing top occupations across the region overall, occupations with significant share in at least two of the profiled industry clusters are indicated.

High-Demand, High-Priority Occupations in the Uplands Region

Shading indicates occupations dominant in the Advanced Manufacturing, Life Sciences, National Security/Defense, and Healthcare clusters, or occupations with significant share in both Advanced Manufacturing and Life Sciences, or significant share in at least 3 industry clusters

Occupation	Total Employment, 2024	Large Jobs Base	High Specialization (LQ >= 1.2)	Positive Recent Growth	Significant Projected Openings or Reskilling	Support For Multiple Industry Clusters	Significant Presence in Recent Job Postings
Miscellaneous Assemblers and Fabricators**	3,875	✓	✓	✓	✓	✓	✓
Registered Nurses	1,937	✓		✓	✓		
Cabinetmakers and Bench Carpenters**	1,247	✓	✓	✓	✓		
First-Line Supervisors of Production and Operating Workers**	1,042	✓	✓	✓	✓	✓	✓
Inspectors, Testers, Sorters, Samplers, and Weighers**	858	✓	✓	✓	✓	✓	✓
Laborers and Freight, Stock, and Material Movers, Hand**	826	✓	✓		✓	✓	✓
Packaging and Filling Machine Operators and Tenders**	767	✓	✓	✓	✓	✓	✓
Woodworking Machine Setters, Operators, and Tenders	634	✓	✓		✓		
Industrial Engineers**	527	✓	✓			✓	✓
Nursing Assistants	445	✓		✓			
Shipping, Receiving, and Inventory Clerks**	442	✓	✓	✓		✓	✓
Furniture Finishers	373		✓				✓
Maintenance and Repair Workers, General**	364		✓	✓		✓	✓
Substance Abuse, Behavioral Disorder, & Mental Health Couns.	357		✓	✓			
Machinists	341		✓			✓	✓
Chemical Equipment Operators and Tenders	328		✓	✓			
Industrial Production Managers**	302		✓	✓		✓	✓
Upholsterers	300		✓	✓			✓
Medical Secretaries and Administrative Assistants	290			✓			
Civil Engineers	253			✓			
Mechanical Engineers**	253		✓			✓	✓
Industrial Engineering Technologists and Technicians	237		✓	✓		✓	
Computer Numerically Controlled Tool Operators**	211		✓	✓		✓	✓
Bioengineers and Biomedical Engineers	188		✓	✓			
Production Workers, All Other	103			✓		✓	✓
Electrical Engineers	102					✓	✓

*** indicates occupations demonstrating strength across four or more metrics*



SECTION 1A:
Advanced Manufacturing Cluster Demand Profile

Regional Overview

Uplands Region's Advanced Manufacturing Cluster Represents:



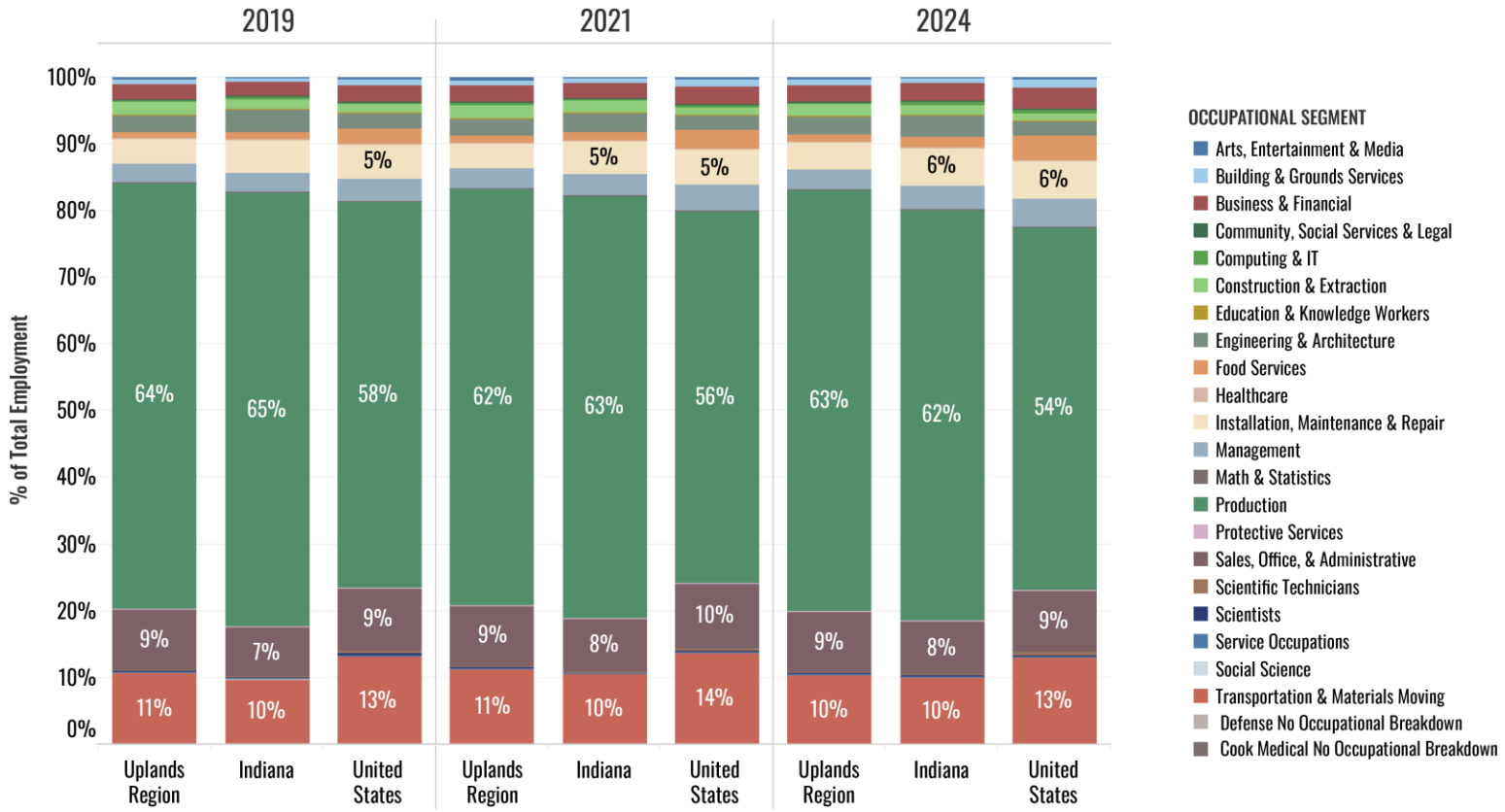
- **Industry Performance Designation:** *Strategic Retention Target* – large and highly specialized employment base but shedding jobs overall since 2019.
- **Leading Regional Subsectors:**
  - Automotive & Heavy Vehicle Equipment
  - Food Processing & Manufacturing
  - Furniture Manufacturing

Source: TEConomy analysis of Bureau of Labor Statistics' QCEW data and Lightcast (Datarun 2025.2).

Cluster Workforce Profile:

Outsized Regional Concentration in Production Roles Relative to the US

- **Regional production occupations are more concentrated relative to the US** while reflecting Indiana concentrations.
- Transportation and logistics occupations are **slightly under-concentrated** relative to the US.
- **Regional Advanced Manufacturing production reflect subsector strengths**, with leading occupations dominated by miscellaneous assemblers and fabricators, cabinet makers and bench carpenters, woodworking machine setters, inspectors and testers, furniture finishers, and upholsterers.

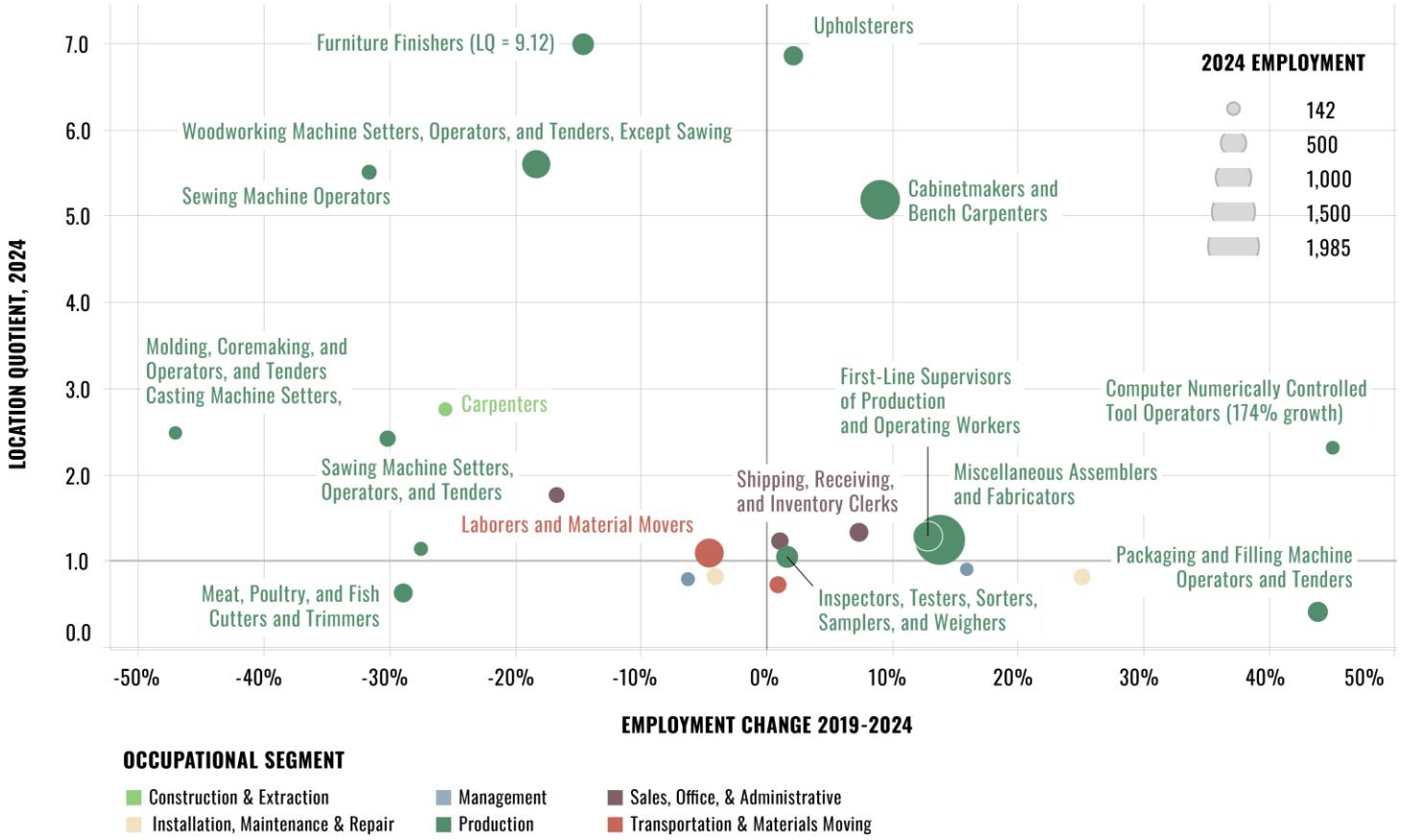


Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.

Detailed Occupational Profiles:

High Specialization Among Skilled Production Roles, though Mixed Performance in Recent Employment Trends

- **High-volume occupations that are both growing and specialized** include miscellaneous assemblers, cabinetmakers and bench carpenters, supervisors of production workers, and upholsterers.
- CNC tool operators have a small employment footprint but are **highly specialized and rapidly growing.**
- **Several production occupations are highly specialized but declining**, including furniture finishers, woodworking or sawing machine setters, sewing machine operators, carpenters, and molding and casting machine setters.
- Meat, poultry, and fish cutters are the region's highest-volume food production occupation, but employment is declining and under-concentrated in the sector.

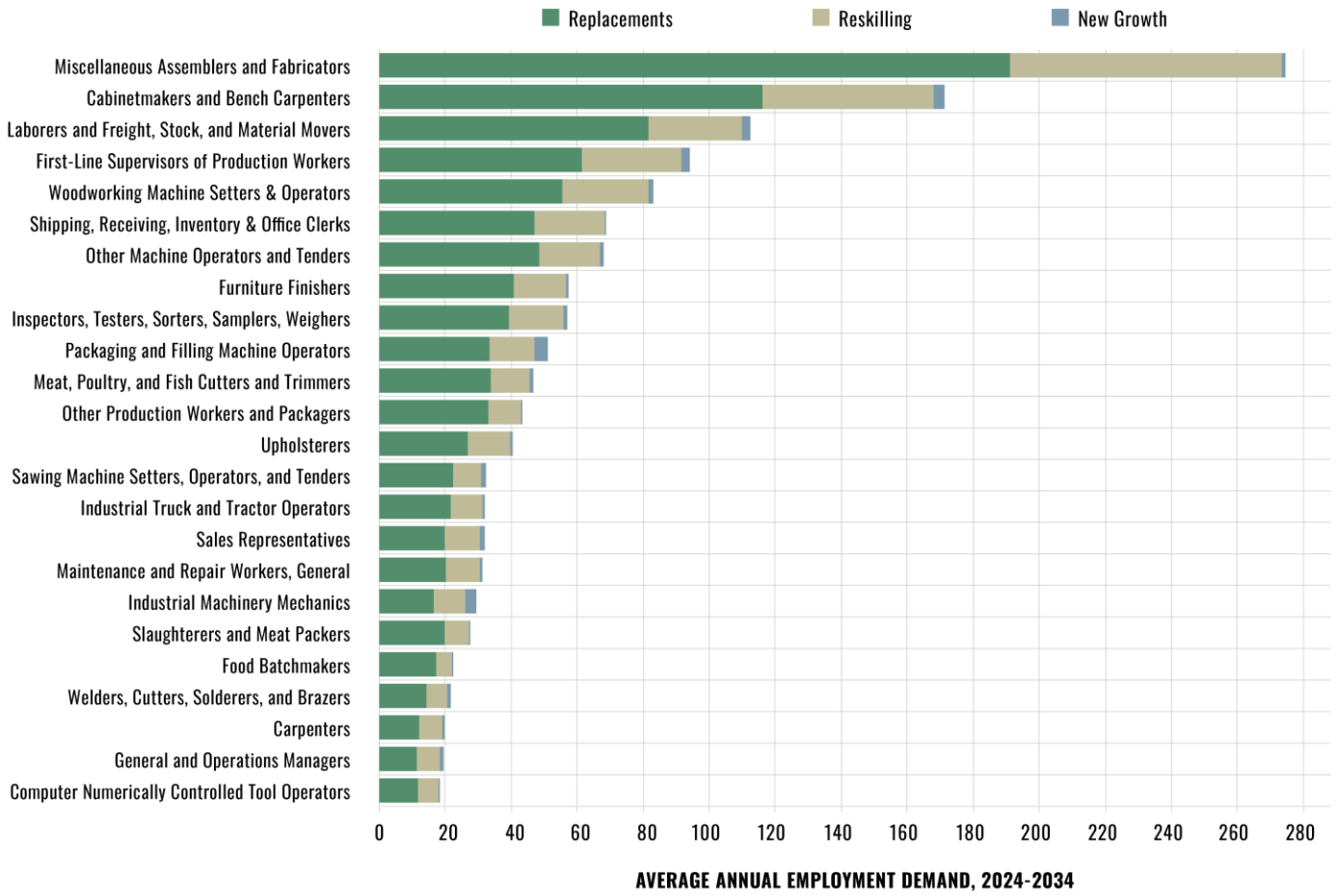


Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.

Occupational Demand

Despite Some Recent Declines, Projected Demand for Production Roles and Furniture Makers Remains Strong

- Across Advanced Manufacturing occupations, there is a **projected need to fill 1,449 new roles annually over the next decade with an additional need to reskill or upskill 603 professionals** annually.
- Projected demand is concentrated in middle-skilled assemblers, specialized furniture manufacturing occupations, low-skilled laborers and movers, and first-line supervisors.



Source: TEConomy analysis of Lightcast, 2025.2.

Furniture Workforce Demand

Job Posting Analytics: June 2021-June 2025 Period; 2,430 Unique Uplands Region Job Postings

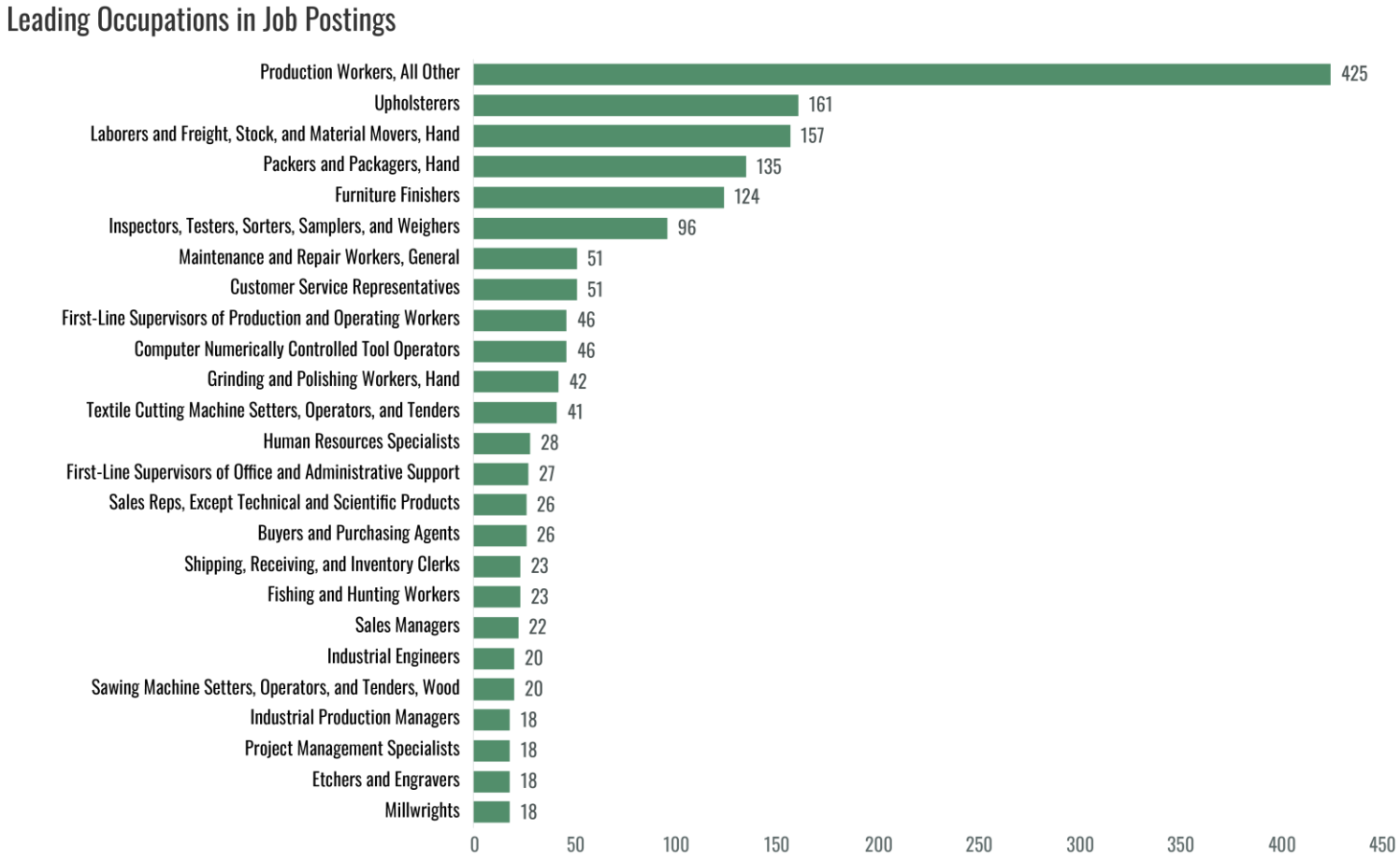
Who's Hiring?

Top Companies by Unique Job Posting Totals for June 2021-June 2025 in Descending Order; Includes Companies with 40+ Postings

- Kimball International
- Indiana Furniture Industries
- Jasper Group
- Best Home Furnishings
- Jasper Seating Co

What Broad Skill Levels are In-Demand?

- Low/Middle Skills (HS Diploma or GED): 16%
- Middle Skills (Associate's): 3%
- High Skills (Bachelor's +): 10%
- [No Education Listed: 70%]



Source: TEConomy analysis of Lightcast, JPA Database, 2025.3.

Automotive/Heavy Vehicle Equip. Workforce Demand

Job Posting Analytics: June 2021-June 2025 Period; 1,087 Unique Uplands Region Job Postings

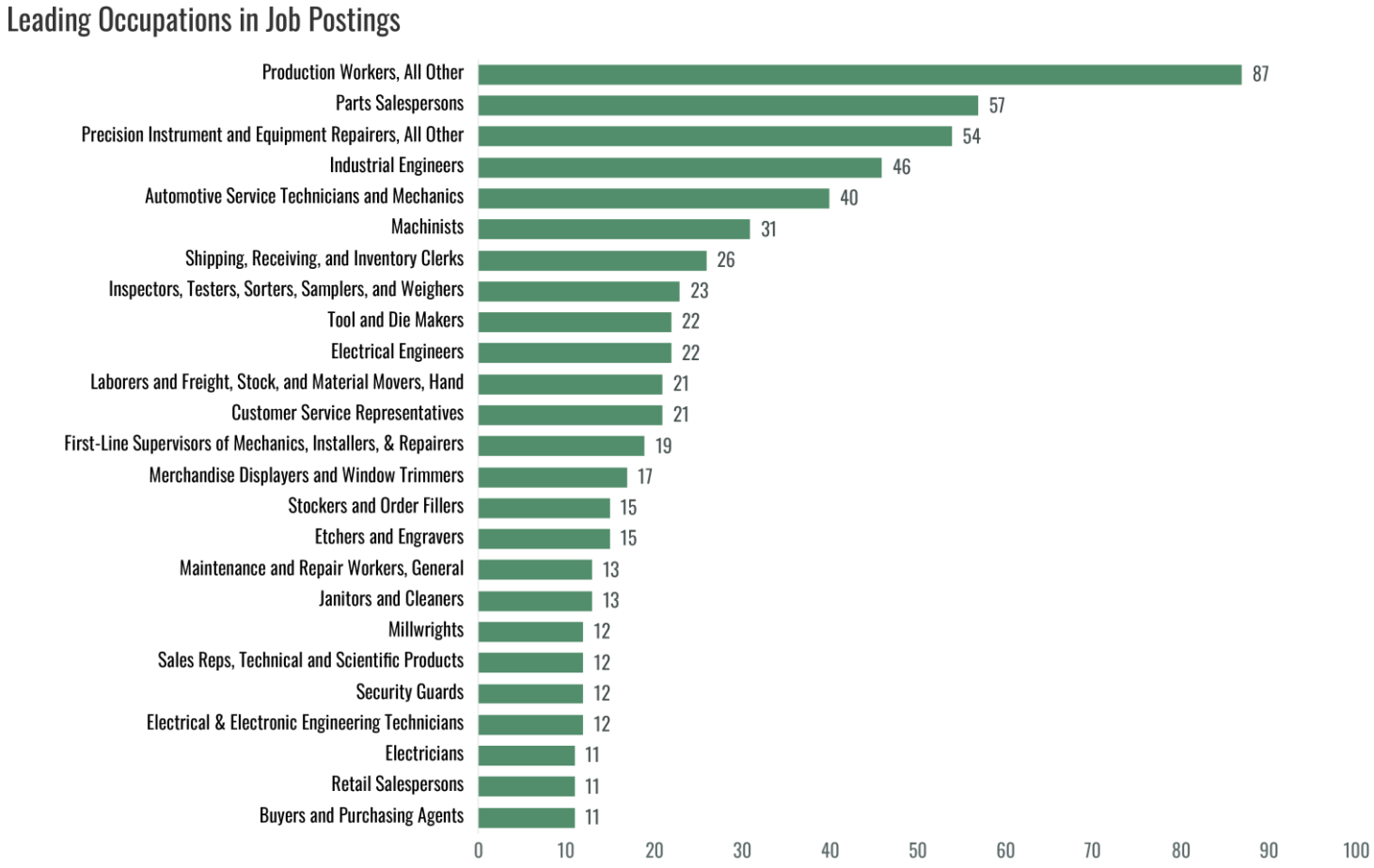
Who's Hiring?

Top Companies by Unique Job Posting Totals for June 2021-June 2025 in Descending Order; Includes Companies with 40+ Postings

- Jasper Engines
- General Motors
- Stellantis
- Fox Factory
- Toyota Motor
- Tasus Corporation

What Broad Skill Levels are In-Demand?

- Low/Middle Skills (HS Diploma or GED): 15%
- Middle Skills (Associate's): 4%
- High Skills (Bachelor's +): 13%
- [No Education Listed: 68%]



Source: TEConomy analysis of Lightcast, JPA Database, 2025.3.

Food Processing & Mfg. Workforce Demand

Job Posting Analytics: June 2021-June 2025 Period; 1,114 Unique Uplands Region Job Postings

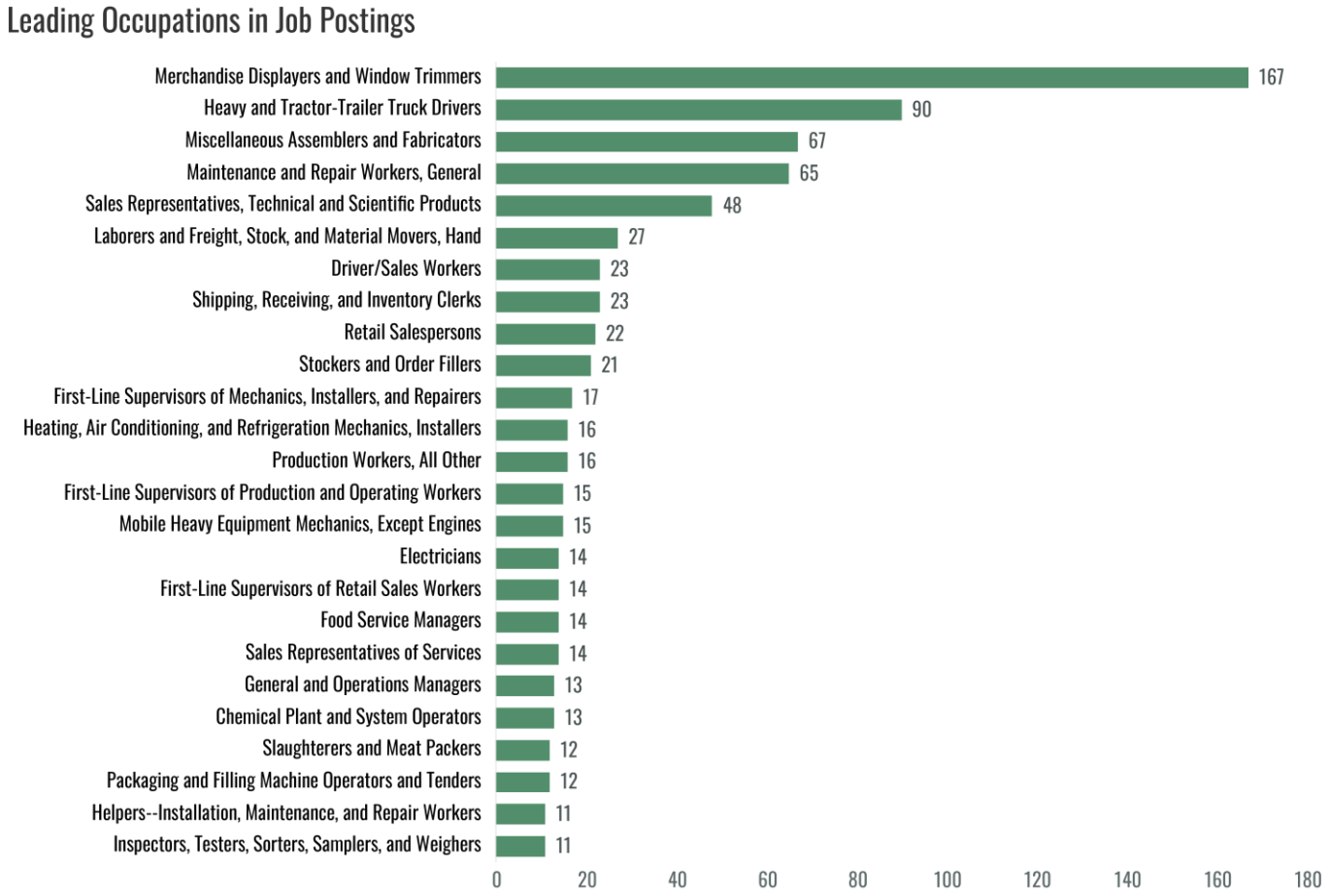
Who's Hiring?

Top Companies by Unique Job Posting Totals for June 2021-June 2025 in Descending Order; Includes Companies with 40+ Postings

- Perdue
- Prairie Farms Dairy
- Coca-Cola Consolidated
- The Coca-Cola Company
- Bunge
- Frito Lay
- Darling International Incorporated
- Mondelez International

What Broad Skill Levels are In-Demand?

- Low/Middle Skills (HS Diploma or GED): 40%
- Middle Skills (Associate's): 8%
- High Skills (Bachelor's +): 12%
- [No Education Listed: 40%]



Source: TEConomy analysis of Lightcast, JPA Database, 2025.3.

High-Demand, High-Priority Roles in Uplands Advanced Manufacturing Industry Cluster

Shading indicates occupations that demonstrate strengths in 3 metrics or 4+ metrics

Occupation	Total Cluster Employment, 2024	Large Jobs Base	High Specialization (LQ >= 1.2)	Positive Recent Growth	Significant Projected Openings or Reskilling	Significant Presence in Recent Job Postings
Miscellaneous Assemblers and Fabricators	1,985	✓	✓	✓	✓	✓
Cabinet Makers and Bench Carpenters	1,246	✓	✓	✓	✓	
First-Line Supervisors of Production and Operating Workers	702	✓	✓	✓	✓	✓
Laborers and Freight, Stock, and Material Movers, Hand	662	✓			✓	✓
Woodworking Machine Setters, Operators, and Tenders, Except Sawing	631	✓	✓		✓	
Inspectors, Testers, Sorters, Samplers, and Weighers	384			✓		✓
Furniture Finishers	373		✓			✓
Upholsterers	300		✓	✓		✓
Shipping, Receiving, and Inventory Clerks	282		✓	✓		✓
Sales Representatives, Wholesale & Manufacturing, Except Technical & Scientific Products	240		✓	✓		
Maintenance and Repair Workers, General	231					✓
Sawing Machine Setters, Operators, and Tenders, Wood	207		✓			
Sewing Machine Operators	179		✓			
Carpenters	155		✓			
Computer Numerically Controlled Tool Operators	149		✓	✓		✓
Heavy and Tractor-Trailer Truck Drivers	105			✓		✓
Production Workers, All Other	67			✓		✓

Situational Assessment

Insights from Interviews: Furniture

TALENT DEMAND INSIGHTS: IN-DEMAND ROLES

- Industrial Maintenance: high demand for increasingly high-skilled individuals who can work on advanced automation equipment, robotics, etc.; ongoing needs to upskill these roles with implications for needed steady investments going forward; employers indicate a need to scale up programs overall.
- Operator/Builder/Assembler: high-volume entry-level roles, lower skilled with high rates of turnover/replacement.
- Marketing, Sales
- Upholsterers – difficult to train/find; craftsman typically with many years of experience.
- Finish Sprayers

TALENT SUPPLY INSIGHTS: KEY REGIONAL PROGRAMS

- Sourcing good graduates in Industrial Maintenance and seeing great value out of the Vincennes University – Jasper "CAP" program.
- Employers are finding important value and promise in **initial youth apprenticeship, internship, and related efforts** including involvement of ROI and Conexus (e.g., "LANE" Program; HUB 19; partnering with specific high schools) … though noted can still use more structure as lots of various players, programs.
- Cluster employers consistently invest in in-house skills training as a primary tactic rather than utilizing regional education/training organizations.

Situational Assessment

Insights from Interviews: Furniture

WORKFORCE GAPS & CHALLENGES

- Major employer challenges and primary emphasis placed on low-skilled operator/builder/assembler roles and attendance – hires don't reliably show up to work; so a resulting need for consistent, ongoing, significant hiring for replacement roles; dynamic where operators leave and shift to a competitor quickly for small wage hikes.
- Consistent challenges cited regarding:
  - Regional population declines which directly relate to sourcing viable candidates;
  - Access to affordable childcare and housing for sustaining population and workforce.

FORWARD-LOOKING CONTEXT: IMPLICATIONS FOR WORKFORCE AND RECOMMENDATIONS

- Employers note that AI, enhanced automation investments are being made, will impact workforce though early stages and subsequent workforce dynamics will evolve over time.
  - As a result, maintenance technician roles are increasingly more skilled and technical; but some roles are getting easier to perform as automation equipment and solutions are implemented (e.g., CNC operators).
  - Recognition that it is difficult to automate certain aspects of furniture manufacturing so need for workforce and skills not going away.

Situational Assessment

Insights from Interviews: Automotive Supply Chain

TALENT DEMAND INSIGHTS: IN-DEMAND ROLES

- Operators: entry-level, lower skilled, similar to Furniture a very challenging "revolving door" situation with high employee turnover, not finding good or reliable fits with attendance the top issue. Typically looking for 2-3 years of manufacturing experience.
- Machinists and Welders in high-demand for significant volume needs, difficult to find with some employers keeping job postings up continually.
- CNC Operators represent a lower volume, but key need as companies continue to invest in equipment.
- Skilled Maintenance Technicians.
- IT roles cited as very challenging to find/hire for larger employers—often relying on contractors, even overseas.
- Mixed dynamics around Engineering—some smaller companies cite as less challenging, stable; other larger employers have challenges finding locally, source from other parts of Indiana

TALENT SUPPLY INSIGHTS: KEY REGIONAL PROGRAMS

- Ivy Tech viewed as a strong, valued regional partner in its relevant Industrial, Mechanical Automation program.
- Companies are attending job fairs; utilizing ROI-sponsored company tours for teachers. See efforts as well aligned.
- Internships viewed by some companies as valuable for sourcing early-career Engineering, IT professionals.
- Companies are utilizing tuition assistance for employees to upskill in welding as well as for mentoring/leadership training
- In general, employers appreciate and emphasize certificate focus as a key need vs. Associate's level degree graduates, reflecting ongoing national trends toward skills-based training and demonstrated competencies for skill production roles.
- Finding important value and promise in initial youth apprenticeship efforts including involvement of ROI and Conexus (e.g., for polymechanical, process techs, maintenance). Also engaging in career awareness efforts at middle school, high school levels (e.g., 3D printing, Welding).
- INvets a valued program, find veterans a good fit.
- Sourcing good graduates in Industrial Maintenance and seeing great value out of the Vincennes University – Jasper "CAP" program.

Situational Assessment

Insights from Interviews: Automotive Supply Chain

WORKFORCE GAPS & CHALLENGES

- Challenge and concerns cited regarding the aging of the regional workforce, including expectation of soon losing long-tenured, reliable employees in key skilled positions to retirements.
- Often having to look and recruit outside of the region for Engineering and IT talent.

FORWARD-LOOKING CONTEXT: IMPLICATIONS FOR WORKFORCE AND RECOMMENDATIONS

- Companies are embracing advanced automation, making investments (e.g., increased use of CNC and other equipment); some are “dabbling” in AI.
- Need for youth to engage in hands-on, mechanical projects, get them interested in skilled production roles and advanced manufacturing in general.
- Continued interest in engaging at high school levels, though a need and emphasis for continual increase in teacher and parent “buy in” to ensure success, steer students toward advanced manufacturing careers.
- Recommendation to help companies in automating their training. At least one company is working with Purdue University students on a Capstone project to help “gamify” and enhance interactive training approaches to in-house training approaches.

Conclusions from Assessments of Advanced Manufacturing Workforce & Talent Demand Dynamics

- The Uplands region is a leader in Advanced Manufacturing, with major, outsized concentrations in furniture, food, and automotive/heavy equipment manufacturing. As a result, regional skilled production occupations are more concentrated relative to the US while reflecting the Uplands region's market concentrations.
- Leading occupations in the cluster are dominated by miscellaneous assemblers and fabricators, cabinet makers and bench carpenters, woodworking machine setters, inspectors and testers, furniture finishers, and upholsterers.
- Looking ahead, the aging of the region's Advanced Manufacturing workforce is placing an outsized emphasis on replacement needs into the future. So, despite some overall employment contraction in the cluster, there is a projected need to fill 1,449 new roles annually over the next decade with an additional need to reskill or upskill 603 professionals annually.
- **Employer interviews identify gaps and challenges, including:** major employer challenges regarding the entry-level, lower-skilled operator/builder/assembler roles and attendance—many workers simply stop showing up; recruiting challenges for Engineering and IT workers; regional population declines limit viable candidate pools; limited access to affordable childcare and housing; and evolving talent, skill needs with automation and AI investments underway.

To address talent and skill needs, Advanced Manufacturing employers are:

- Continuing to invest in in-house training capabilities.
- Finding important value and promise in initial youth apprenticeship, internship, and related efforts including involvement of ROI and Conexus.
- Sourcing quality graduates in Industrial Maintenance and seeing great value out of the Vincennes University – Jasper "CAP" program. Generally embracing certificates and other micro-credentialling approaches for skilling.
- Attending job fairs; utilizing ROI-sponsored company tours for teachers. See efforts of ROI as well aligned.
- Utilizing internships, co-op approaches to engage early-career engineering and IT professionals.



SECTION 1B:
Life Sciences Cluster Demand Profile

Regional Overview

Uplands Region's Life Sciences Cluster Represents:



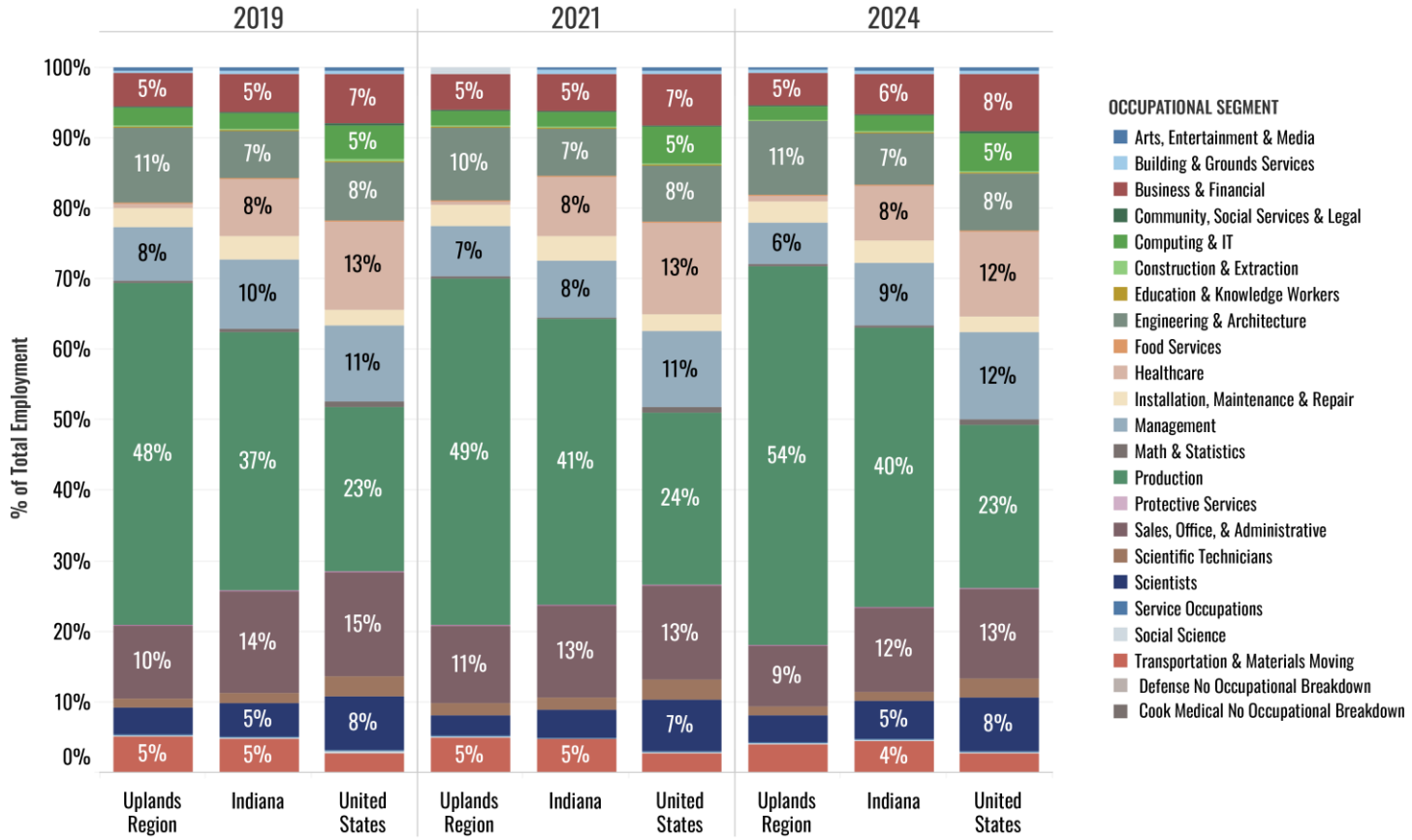
- **Industry Performance Designation:** *Current Strength* – large and highly specialized employment base, adding jobs and outpacing the US since 2019.
- **Leading Regional Subsectors:**
  - Pharmaceuticals
  - Medical Devices and Equipment

Source: TEConomy analysis of Bureau of Labor Statistics' QCEW data and Lightcast (Datarun 2025.2).

Workforce Profile:

Outsized Regional Concentration in Production and Engineering Occupations with Lower Concentration in Scientists

- The Uplands region has **outsized concentration in production employment,** and the industry share of production employment is increasing.
- Engineering employment in the region is somewhat outsized.
- **Employment shares in scientist and scientific technician occupations are relatively lower,** suggesting lesser emphasis on R&D in the region.
- Regional Life Sciences production occupations are dominated by miscellaneous assemblers and fabricators, inspectors and sorters, packaging and filling machine operators, first-line supervisors, and chemical equipment operators.

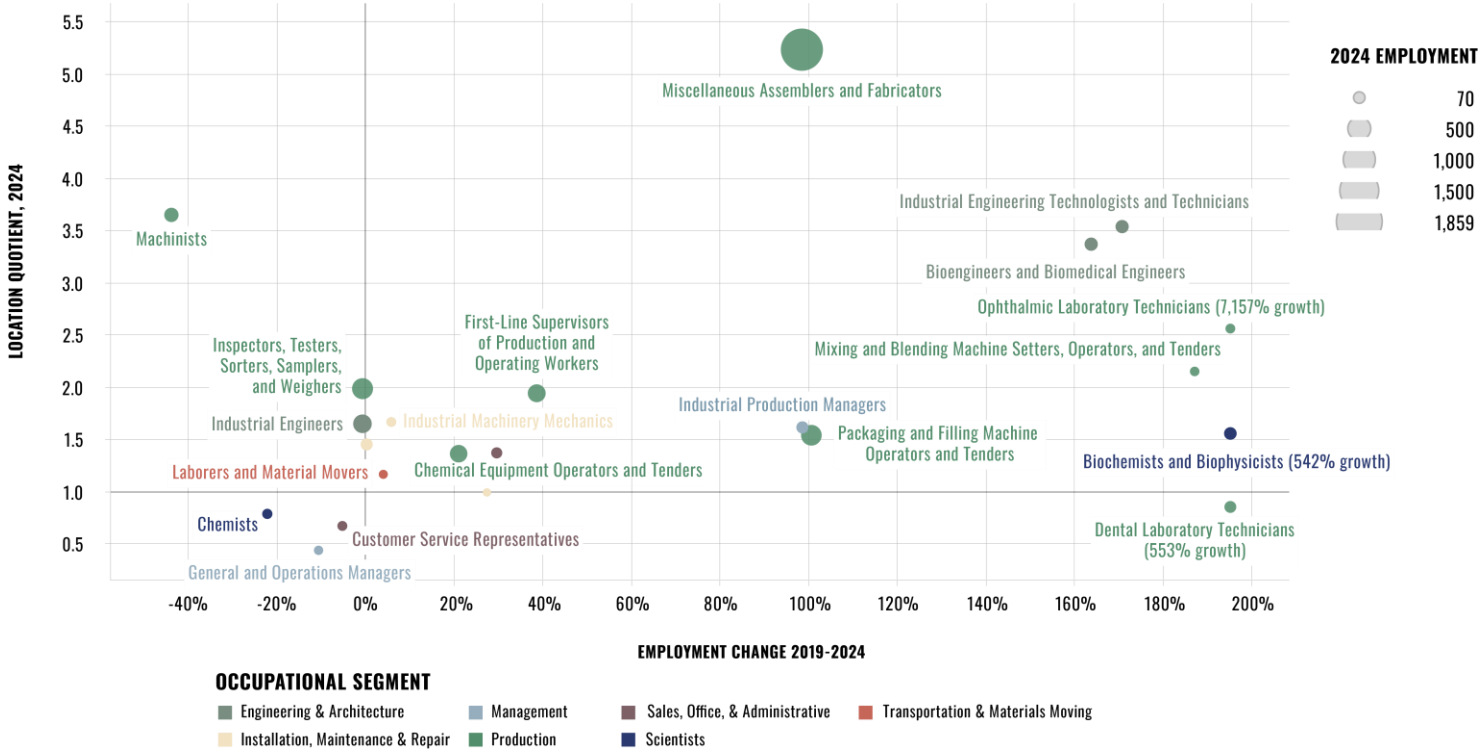


Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.
Note: Analysis includes NAICS 326199 - All Other Plastics Product Manufacturing with the baseline Life Sciences definition to approximate the occupational breakdown of Cook Polymer Tech (CPT), but staffing patterns data is not available for the other supplementary employment figures provided by Cook Medical.

Detailed Occupational Profiles:

High Specialization and Growth in Production Occupations, Industrial Engineering Techs, and Bioengineers

- **High-volume occupations that are both growing and specialized** include miscellaneous assemblers, industrial engineering techs, bio- and biomedical engineers, first-line supervisors of production workers, packaging machine operators, and chemical equipment operators.
- Inspectors and industrial engineers are specialized and large, but growth has been flat since 2019.
- Machinists are highly specialized but declining.
- A few **smaller lab technician and scientist occupations have grown extremely rapidly** since 2019.

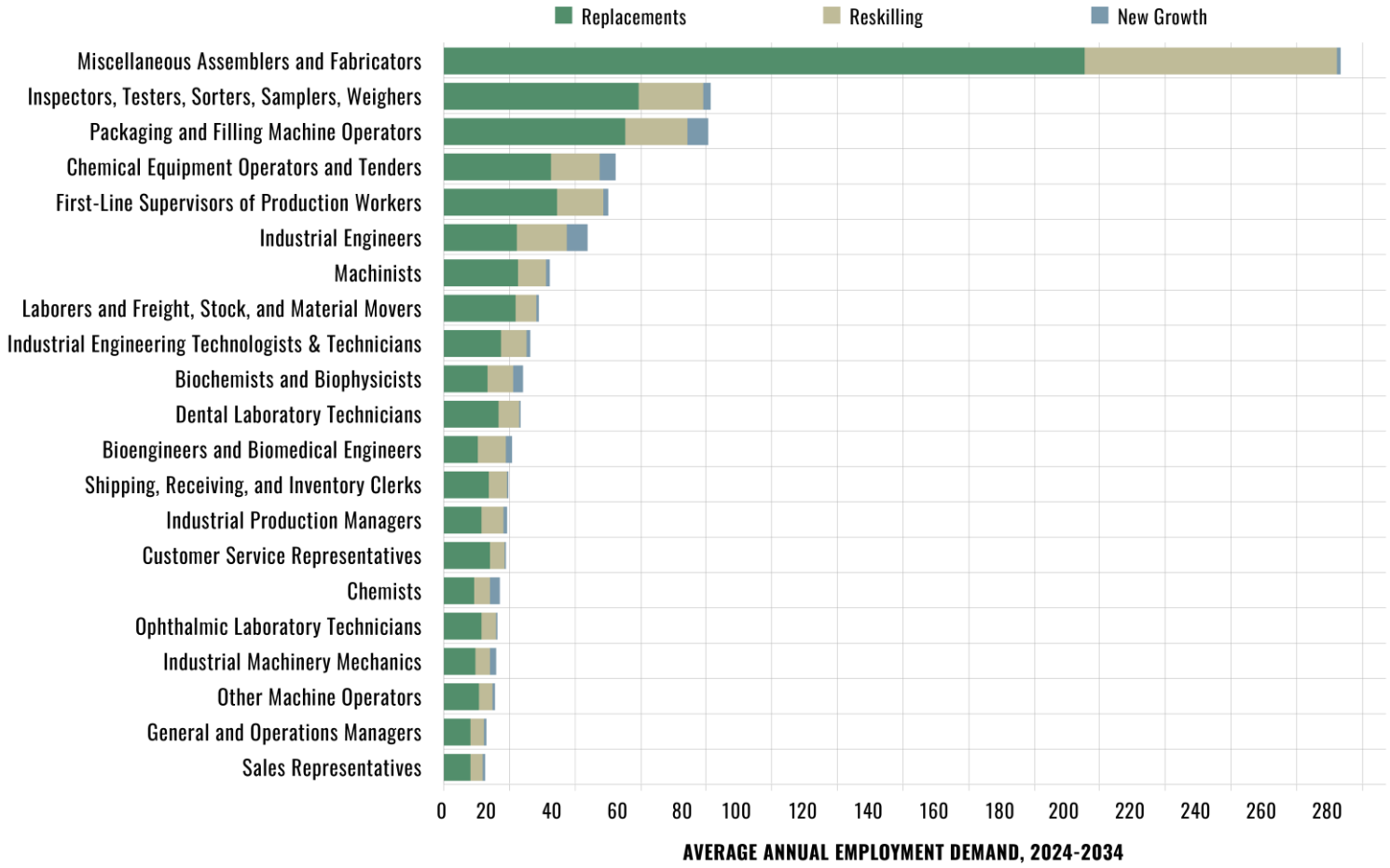


Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.
Note: Analysis includes NAICS 326199 - All Other Plastics Product Manufacturing with the baseline Life Sciences definition to approximate the occupational breakdown of Cook Polymer Tech (CPT), but staffing patterns data is not available for the other supplementary employment figures provided by Cook Medical.

Occupational Demand:

Projected Demand Indicates Continuing Importance of Industrial Production, Science, and Engineering Roles

- Across Life Science occupations, there is a **projected need to fill 968 new roles annually over the next decade with an additional need to reskill or upskill 379 professionals** annually.
- Projected demand is concentrated in middle-skilled assemblers, inspectors and sorters, packaging machine operators, chemical equipment operators, first-line supervisors, and machinists.



Source: TEConomy analysis of Lightcast, 2025.2.

Workforce Demand

Job Posting Analytics: June 2021-June 2025 Period; 5,160 Unique Uplands Region Job Postings

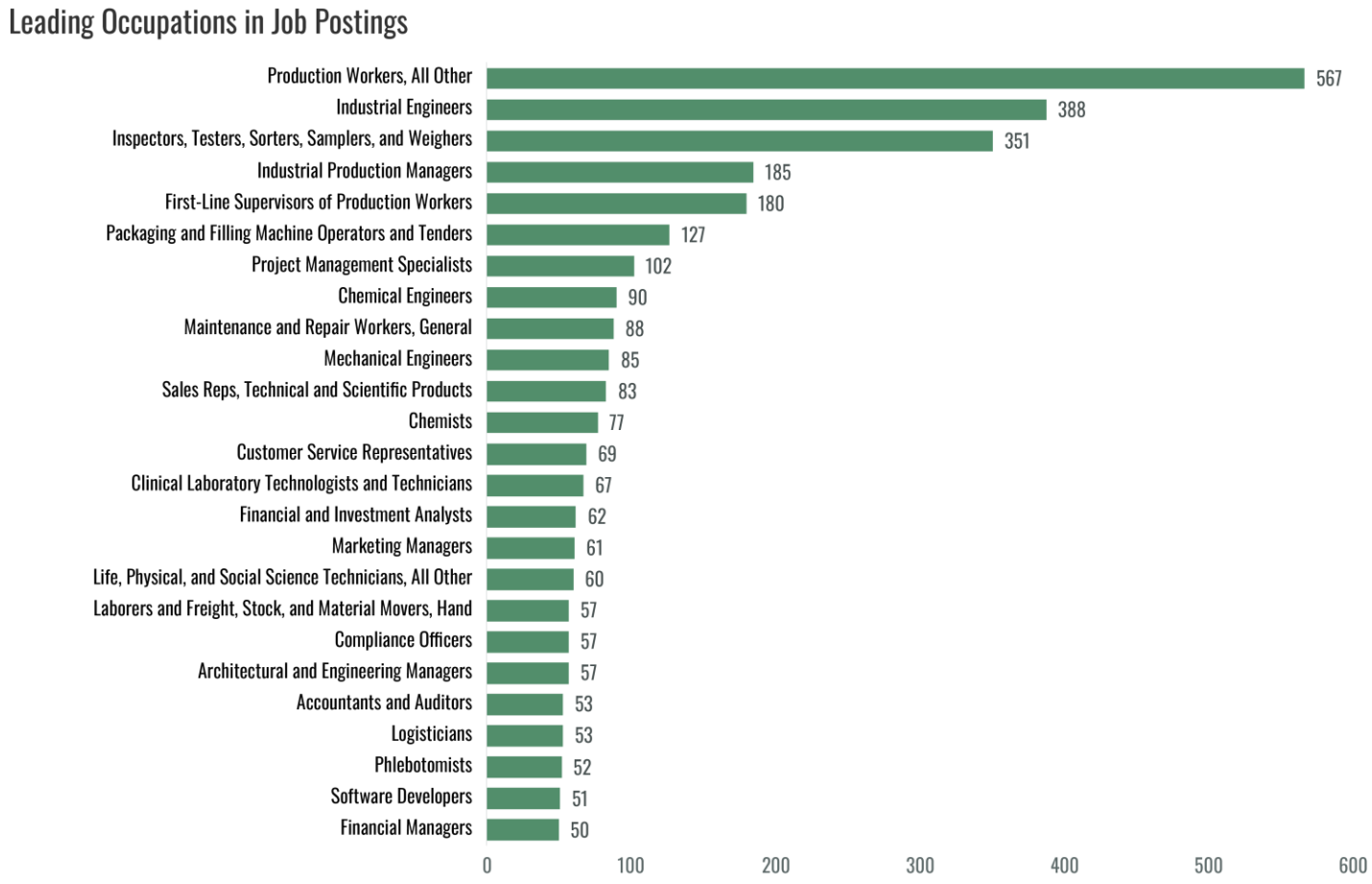
Who's Hiring?

Top Companies by Unique Job Posting Totals for June 2021-June 2025 in Descending Order; Includes Companies with 40+ Postings

- Catalent (Now Novo Nordisk)
- Cook Medical
- Baxter International (Now Simtra)
- Novo Nordisk
- Boston Scientific
- CSL
- TRIMEDX
- Canon Medical Systems USA
- Singota Solutions
- Siemens Healthineers
- Icon

What Broad Skill Levels are In-Demand?

- Low/Middle Skills (HS Diploma or GED): 28%
- Middle Skills (Associate's): 11%
- High Skills (Bachelor's +): 54%
- [No Education Listed: 7%]



Source: TEConomy analysis of Lightcast, JPA Database, 2025.3.

High-Demand, High-Priority Roles in Uplands Life Sciences Industry Cluster

Shading indicates occupations that demonstrate strengths in 3 metrics or 4+ metrics

Occupation	Total Cluster Employment, 2024	Large Jobs Base	High Specialization (LQ >= 1.2)	Positive Recent Growth	Significant Projected Openings or Reskilling	Significant Presence in Recent Job Postings
Miscellaneous Assemblers and Fabricators	1859	✓	✓	✓	✓	
Inspectors, Testers, Sorters, Samplers, and Weighers	458	✓	✓		✓	✓
Packaging and Filling Machine Operators and Tenders	444	✓	✓	✓	✓	✓
Industrial Engineers	358	✓	✓		✓	✓
First-Line Supervisors of Production and Operating Workers	333	✓	✓	✓	✓	✓
Chemical Equipment Operators and Tenders	320	✓	✓	✓	✓	
Machinists	213	✓	✓			
Bioengineers and Biomedical Engineers	182		✓	✓		
Industrial Engineering Technologists and Technicians	181		✓	✓		
Biochemists and Biophysicists	165		✓	✓		
Industrial Production Managers	152		✓	✓		✓
Laborers and Freight, Stock, and Material Movers, Hand	149		✓	✓		
Dental Laboratory Technicians	146			✓		
Shipping, Receiving, and Inventory Clerks	127		✓	✓		
Chemists	108					✓
Ophthalmic Laboratory Technicians	100		✓	✓		
Production Workers, All Other	35					✓

Situational Assessment

Insights from Interviews: Life Sciences (Medical Device Focused Interviews)

TALENT DEMAND INSIGHTS: IN-DEMAND ROLES

- Manufacturing Operators and Inspectors (hourly roles) in high demand in high volumes among device manufacturers; preference for experience in device production (ideally 1-2 years), will hire directly out of high school and train in-house. This workforce is a major challenge to hire and retain with lots of turnover within the first 6-12 months.
- Similar dynamics for entry-level Product Builders and Assemblers in device production with significant turnover and challenging to grow this workforce.
- Engineers in R&D and Manufacturing with Materials, Chemical, Polymers, and Industrial Engineering expertise.
  - Among Industrial/Mfg. Engineers – need to complement knowledge with skills in data analytics, AI, Quality Assurance.
- Lower volume demand for Machinists, Industrial Maintenance (with controls backgrounds)
- Ongoing, lower volume demand for business professionals.

TALENT SUPPLY INSIGHTS: KEY REGIONAL PROGRAMS

- Emphasis on in-house training for hourly manufacturing operators, inspectors, product builders and make use of simulated production floor spaces.
- Companies participate in ROI-led site tours, presentations, other programs which are seen as effective for career awareness among regional high school students.
- Partnering with ROI at high school level at Edgewood Life Sciences Academy, part of the ROI Ready Schools Initiative where employers compliment responsiveness to needs, student connections; Edgewood is creating an advanced mfg. track.
- Sourcing R&D and Manufacturing Engineers (Materials, Chemical) from: Purdue Univ., Univ. of Cincinnati, Univ. of Dayton, Univ. of Louisville, Rose-Hulman. Utilize co-ops, summer interns, and Capstone engagements to strong effect.
- Vincennes University for sourcing Precision Machining (2-yr.)
- Strong relationships with IU for Business, HR, Financial Professionals.

Situational Assessment

Insights from Interviews: Life Sciences (Medical Device Focused Interviews)

WORKFORCE GAPS & CHALLENGES

- In general, significant competition for device manufacturing workforce though a distinct and separate market typically from Indianapolis region.
- Device manufacturers also compete with pharmaceutical manufacturers for entry-level talent, where pharma competes via higher wages and results in driving up regional production wages generally.
- Limitations on engaging with high school students due to status as minors in a regulated production environment.
- Aging workforce generally, will exacerbate challenges with turnover and replacing more experienced workforce.
- Implementation of AI, other advanced automation expected to further skills gaps as production and engineering roles evolve.

FORWARD-LOOKING CONTEXT: IMPLICATIONS FOR WORKFORCE AND RECOMMENDATIONS

- Ongoing investments by companies in streamlining production processes and in some cases, investing in new automation equipment and AI with implications for skilled production roles.
- Continued support, appreciation for ROI-led efforts to enhance career awareness among students, teachers regionally; companies hosting STEM Fellows.
- Interest in engaging with Ivy Tech and perhaps utilize a dual enrollment structure though would like ROI to consider acting as a “convener” between regional schools and companies.
- Interest in engaging Vincennes University for deepening programs around machining, maintenance, processing technicians in learn and earn approaches, internships, etc.
- Companies continually looking for good leaders among ranks, willing to invest in internal rotation opportunities, recruit from outside region. Utilizing INVets for these efforts.
- Conexus Indiana is bringing together manufacturing leaders, seen as valuable and would like to see ROI emphasizing regionally as key convener.

Conclusions from Assessments of Life Sciences Workforce & Talent Demand Dynamics

- The Uplands region's life sciences industry is especially manufacturing and production-intensive, with a focus in both medical device and pharmaceutical production.
- As a result, numerous skilled production occupations are extremely specialized in their regional concentration and demonstrate consistent demand through job postings and occupational projections.
- Industrial engineers and industrial production managers are in high-demand to oversee operations and implement streamlined production processes and enhanced automation capabilities, which employers emphasize are being implemented.
- **Employer interviews identify gaps and challenges, including**: major hiring and retention challenges for entry-level manufacturing operator, inspector, and assembler roles; stiff competition for the device manufacturing workforce including wage imbalances with the pharmaceutical subsector; an aging workforce and upcoming significant replacement needs; and the evolution of roles and skills with enhanced automation, AI, and other technologies being implemented.

To address talent and skill needs, life sciences employers are:

- Engaging with ROI on regional career awareness and connections building.
- Solidifying talent pipelines with in-region and out-of-region institutions; including major emphasis on internships, co-ops.
- Interested in deeper engagements with regional colleges and universities.
- Seeking further networking and convening opportunities with Conexus Indiana and ROI.



SECTION 1C:
National Security & Defense Cluster Demand Profile

Regional Overview

Uplands Region's National Security & Defense Cluster Represents:



- **Industry Performance Designation:** *Current Strength* – large and highly specialized employment base, adding jobs and outpacing the US since 2019.
- **Leading Regional Subsectors:**
  - NSWC Crane Operations
  - Industry Partners, Contracting Community

Source: TEConomy analysis of Bureau of Labor Statistics' QCEW data and Lightcast (Datarun 2025.2).

Methodology for Staffing Patterns of Engineering Services and Other Civilian Defense Support Within National Security/Defense Cluster

Due to data limitations, staffing patterns information is not available for government employment in the National Security/Defense industry cluster. The analysis presented in the next several slides includes private employment in key NAICS codes covering engineering services and defense-related research and manufacturing (see Appendix slide for full industry definition). This will necessarily capture some industry activity not directly supporting national defense, but is the best approximation for private defense-oriented employment and NSWC Crane support firms.

Private sector engineering services and defense support employment included in staffing patterns analysis:

- Industry Activity at WestGate@Crane
- Ammunition, Small Arms, and Ordnance Manufacturing
- Search, Detection, and Navigation Instrument Manufacturing
- Military Vehicle Manufacturing
- Engineering Services
- R&D in Science, Engineering, Nanotech

2,187 total jobs in 2024

Public sector employment not included in staffing patterns analysis:

- Crane NSWC Employment
- Enlisted Military
- Other Federal Employment

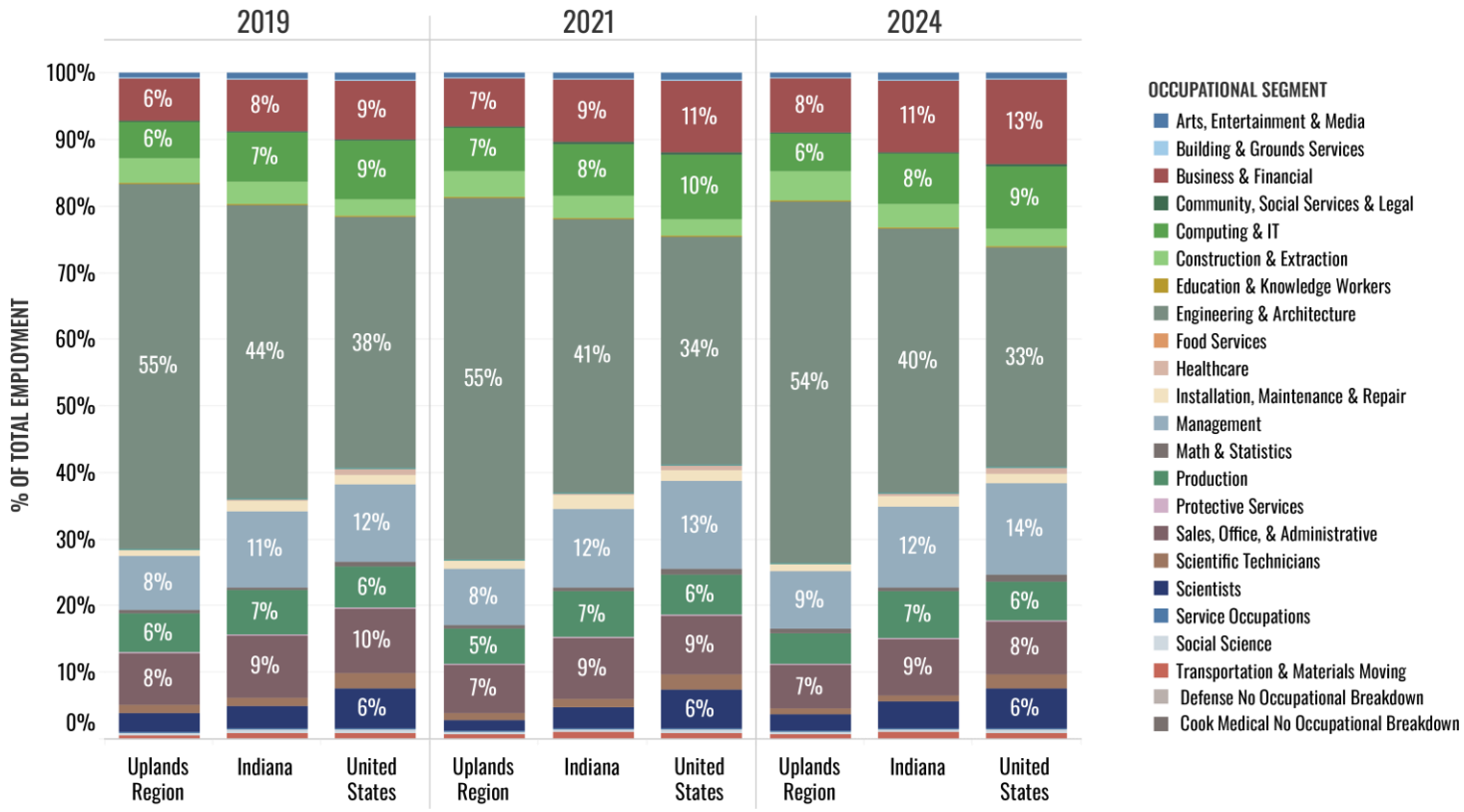
6,157 total jobs in 2024

8,344 total National Security/Defense jobs in 2024

Engineering Services and Other Civilian Defense Support Workforce Profile:

High Regional Concentration in Engineering Services Including Civil, Mechanical, and Electrical Engineers

- **Engineering services are highly concentrated in the Uplands region** and are dominated by civil, mechanical, and electrical engineers; civil and electrical engineering technicians; and surveyors.
- In addition to engineering roles, the regional civilian defense workforce has **significant employment but lower concentrations in management, business, and administrative positions.**

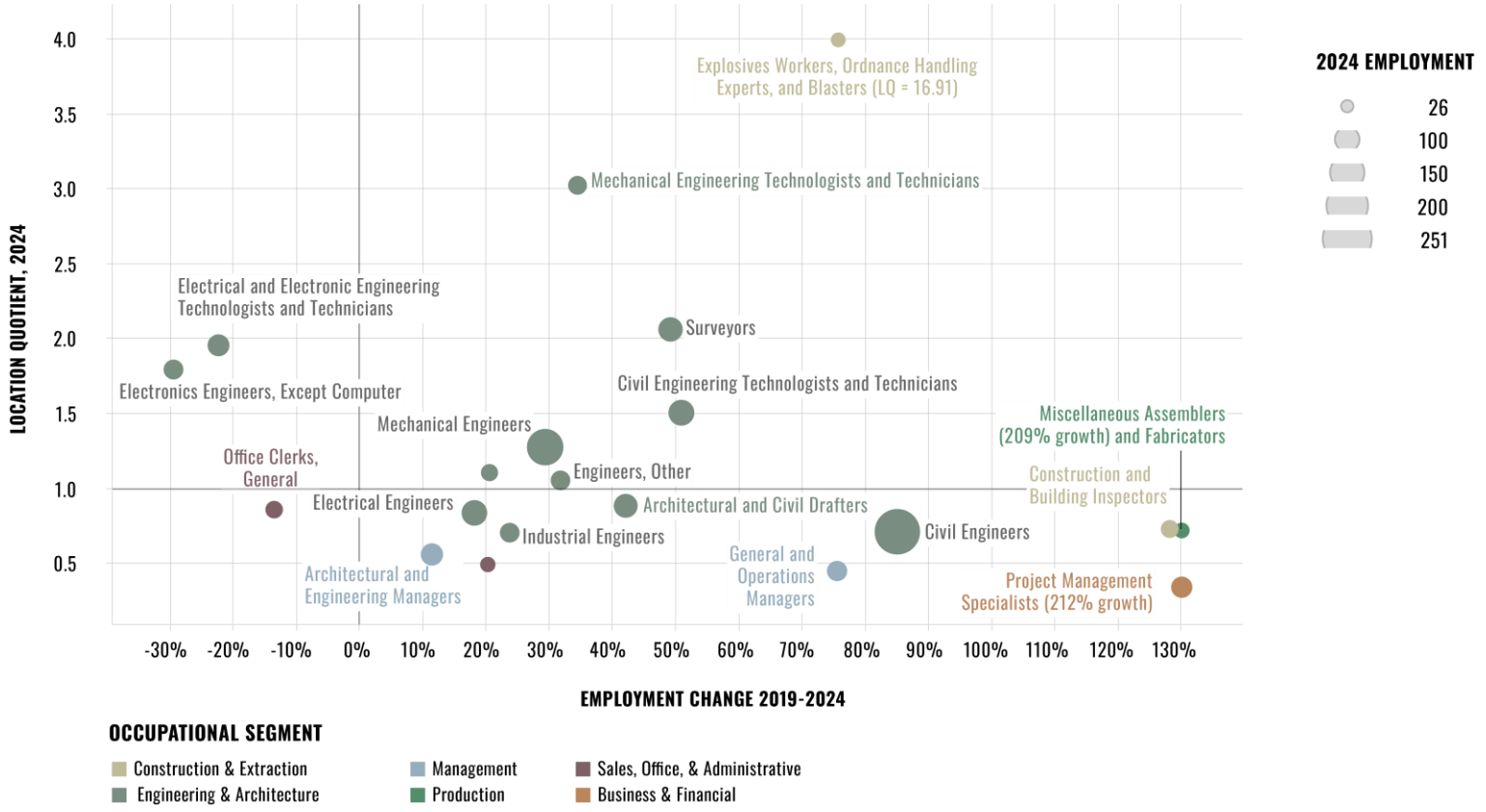


Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.

Engineering Services and Other Civilian Defense Support Detailed Occupational Profiles:

Most Engineering and Management Roles are Growing Rapidly, but Regional Specialization is Mixed

- **High-volume occupations that are both growing and specialized** include mechanical engineers and technicians, civil engineering technicians, and surveyors.
- **Explosives and ordnance workers are the region's most specialized defense support occupation** and are growing rapidly.
- **Civil Engineers are the largest defense support occupation** and one of the fastest growing, but are **under-concentrated regionally.**
- Electrical and industrial engineers and managers are also under-concentrated despite significant employment volume and growth.
- Electronics engineers and technicians are highly specialized but losing employment footprint.

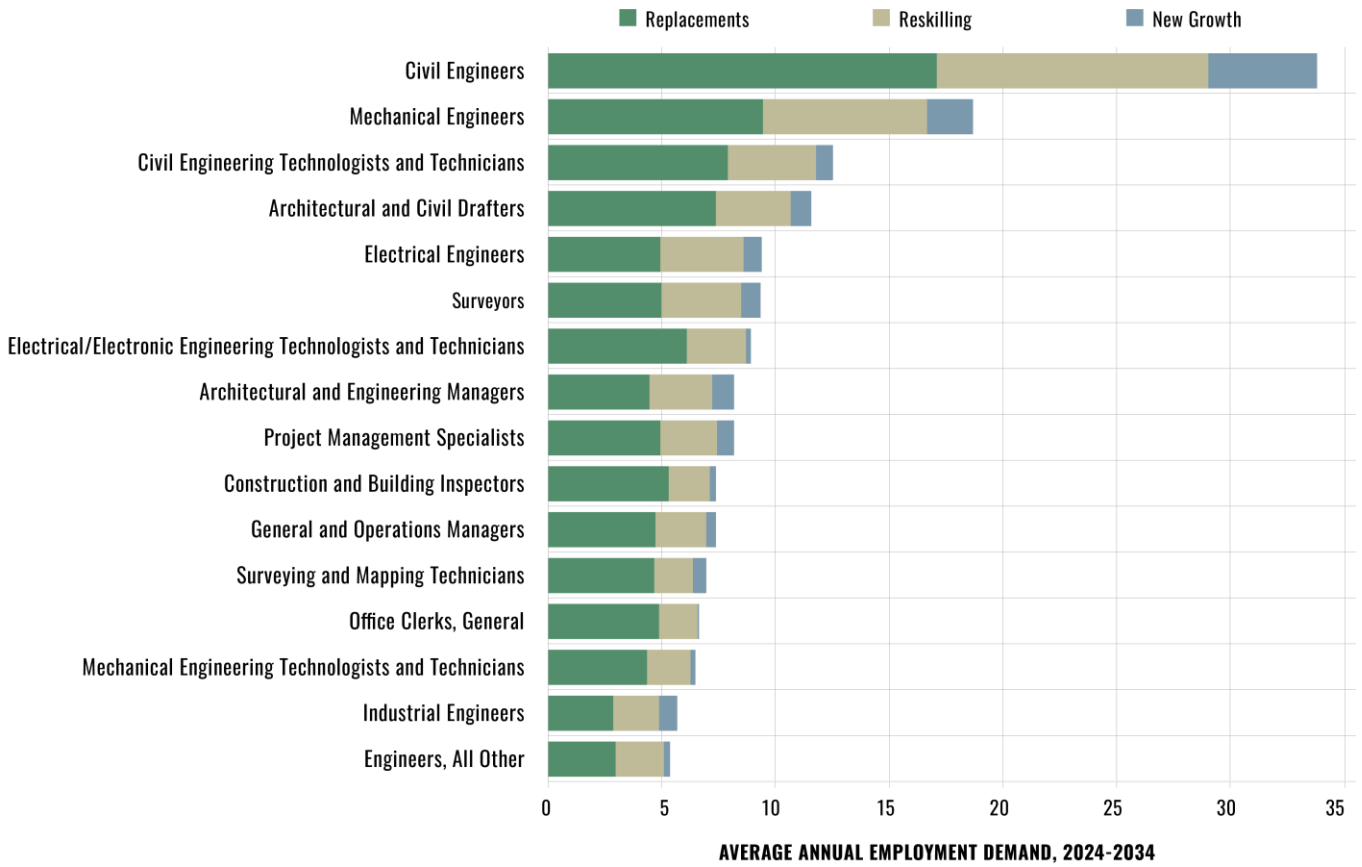


Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.

Occupational Demand for Engineering Services and Civilian Defense Support Workforce:

Projected Demand Concentrated in Engineering, with Significant Demand Driven by New Growth

- Across civilian defense support occupations, there is a **projected need to fill 216 new roles annually over the next decade with an additional need to reskill or upskill 100 professionals** annually.
- Projected demand is concentrated in civil, mechanical, and electrical engineering; surveying; and management.
- New growth as a proportion of future demand is significant relative to other industry clusters.



Source: TEConomy analysis of Lightcast, 2025.2.

Workforce Demand

Job Posting Analytics: June 2021-June 2025 Period; 2,407 Unique Uplands Region Job Postings

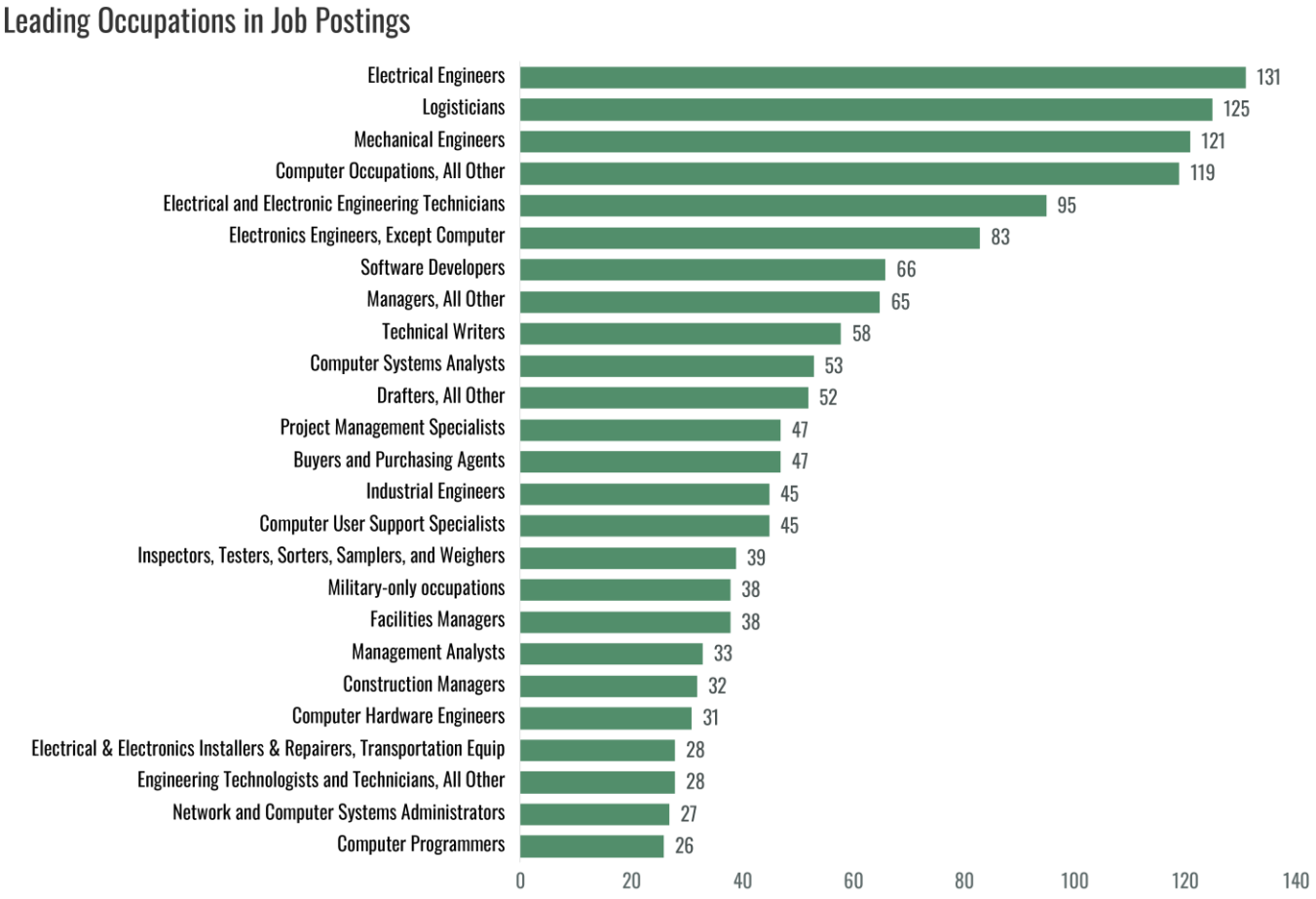
Who's Hiring?

Top Companies by Unique Job Posting Totals for June 2021-June 2025 in Descending Order; Includes Companies with 40+ Postings

- SAIC
- Amentum
- United States Navy
- Braun Intertec
- Leidos
- Scientific Research Corporation
- The Charles Stark Draper Laboratory
- Jacobs Solutions
- United States Department of Defense

What Broad Skill Levels are In-Demand?

- Low/Middle Skills (HS Diploma or GED): 17%
- Middle Skills (Associate's): 9%
- High Skills (Bachelor's +): 61%
- [No Education Listed: 13%]



Source: TEConomy analysis of Lightcast, JPA Database, 2025.3.

High-Demand, High-Priority Roles in Uplands Engineering Services and Other Civilian Defense Support Workforce

Shading indicates occupations that demonstrate strengths in 3 metrics or 4+ metrics

Occupation	Total Cluster Employment, 2024	Large Jobs Base	High Specialization (LQ >= 1.2)	Positive Recent Growth	Significant Projected Openings or Reskilling	Significant Presence in Recent Job Postings
Civil Engineers	251	✓		✓	✓	
Mechanical Engineers	161	✓	✓	✓	✓	✓
Civil Engineering Technologists and Technicians	81	✓	✓	✓	✓	
Electrical Engineers	79	✓		✓	✓	✓
Surveyors	72	✓	✓	✓	✓	
Architectural and Civil Drafters	69	✓		✓	✓	
Architectural and Engineering Managers	60			✓		
Electrical and Electronic Engineering Technologists and Technicians	58		✓		✓	✓
Project Management Specialists	54			✓		✓
Electronics Engineers, Except Computer	47		✓			✓
Industrial Engineers	47			✓		✓
Engineers, All Other	46			✓		
Mechanical Engineering Technologists and Technicians	43		✓	✓		
Surveying and Mapping Technicians	35			✓		
Explosives Workers, Ordnance Handling Experts, and Blasters	26		✓	✓		
Geoscientists, Except Hydrologists and Geographers	22		✓	✓		
Logisticians	13			✓		✓

Situational Assessment

Insights from Interviews: NSWC Crane

TALENT DEMAND INSIGHTS: IN-DEMAND ROLES

- NSWC Crane has major, steady Science and Engineering (S&E) needs spanning varied expertise, including:
  - Electrical/Electronics Engineering (EE, leading area)
  - Computer Engineering
  - Mechanical Engineering
  - Physicists
  - Chemical Engineers (more targeted, smaller levels)
- Two “flavors” for levels of hiring, generally a mix of roughly half and half:
  - Entry level candidates at a Bachelor’s, Master’s levels
  - Experienced candidates (often 3+ or 5-10 yrs of experience)
- NSWC also has steady needs for Cybersecurity talent and skills, competes directly in this area with region’s private sector.

TALENT SUPPLY INSIGHTS: KEY REGIONAL PROGRAMS

- NSWC recruits from key programs across several states for recruiting entry-level talent, particularly Engineers from IN, KY, MI, TN, IL, VA.
  - Top 3 institutions are: Purdue, Rose Hulman, Southern Illinois University.
- Have helped stand up new MS level programs with Purdue in Defense and Security; Electronic Warfare
- Engage with Indiana University to source Computer Science graduates.
- Some ongoing engagement with Ivy Tech for graduates from Technician, Logistics programs.
- NSWC makes significant use of interns for its entry-level pipeline, targeting students early.

Situational Assessment

Insights from Interviews: Companies/Contractors

TALENT DEMAND INSIGHTS: IN-DEMAND ROLES

- Cleared engineers across disciplines: electrical, computer, microelectronics, software, mechanical, physics/radiation effects, and quality/ISO engineers for test, design, reverse engineering, and radiation effects work. Electrical engineers have particularly high demand:
  - Entry-Level Electrical Engineers – design experience or exposure to production environments during college programs a major plus.
  - Senior-Level Electrical Engineers – extremely difficult to attract/recruit this type of worker with 5-10 years of experience, experience working for a defense contractor, prime, or other OEM in microelectronics or other advanced systems integration roles. Systems / integration and test engineers for multi-platform UAS/USV, C-UAS, and C3I systems, plus cyber engineers (offensive/defensive) and software engineers – need for project management
- Test Engineering Technicians for labs, radar depots, payload integration and ordnance manufacturing, with skills in electronics test, micro-miniature circuit repair, cleanroom practices, explosives handling, and logistics/material handling (forklift, warehouse)
- Program support roles: logisticians (incl. ordnance and high-explosive logistics), configuration and product data management (e.g., Windchill), technical writers, project/program managers, financial analysts, and HR/recruiting staff to sustain scale-up

TALENT SUPPLY INSIGHTS: KEY REGIONAL PROGRAMS

- Key relationships and major ties back to Purdue and Rose-Hulman – often rely on K-12 exposure to companies, then attracting those same candidates after they graduate since they have ties to the region. Both noted as having successful partnership, internship, and co-op programs for sourcing talent.
- USI also described as having excellent internship program.
- IU, Ball State University, Vincennes University, Ivy Tech also cited as having some relationships to source engineering and related talent.
  - Community and technical colleges (Ivy Tech, Vincennes) are actively partnering with employers on associates-level and certificate programs (e.g. logistics certificates and a new semiconductor certificate viewed as a critical future source of lab technicians)
- Key need for U.S. citizens, potential to hold security clearance – a major limitation in sourcing candidates.

Situational Assessment

Insights from Interviews: Companies/Contractors

WORKFORCE GAPS & CHALLENGES

- Acute shortage of mid-career and senior cleared talent (5–15 years experience), especially in microelectronics, cyber, and systems/component engineering; firms see a looming knowledge gap as older experts retire and mid-career cohorts are thin nationally.
- Skills mismatches among new grads: limited hands-on lab work, weak exposure to semiconductors and hardware-centric EE, declining availability of specialized design/modeling courses, and weak technical writing/communication skills all require substantial employer-side upskilling
- Sourcing U.S. citizen candidates, including those that can potentially hold security clearances.
- Challenge of geographic immobility of experienced Electrical Engineers and other roles needing microelectronics components skills due to established family/kids elsewhere cited as the most common issue, but this class of worker is also critical to ongoing growth at West Gate.
- Location, housing, and lifestyle are recurring barriers: candidates perceive Crane/WestGate as remote; quality housing near the base is limited; many staff end up commuting from Bloomington or farther, and long-distance relocation into southern Indiana is difficult for senior candidates

FORWARD-LOOKING CONTEXT: IMPLICATIONS FOR WORKFORCE AND RECOMMENDATIONS

- Seeing major expansion of the microelectronics workforce in the coming years to staff up new buildings/facilities – need to find ways to collaborate around microelectronics workforce sourcing rather than compete amongst West Gate companies for the same limited pool.
- Firms are increasingly “playing the long game” with talent by scaling K-12 exposure, high-school and college internships (often with very high conversion rates), and structured early-career training/mentoring to grow their own senior engineers and PMs locally.
- Strong interest in regionally coordinated bridge/reskilling programs especially short, applied microelectronics technician and lab-skills bootcamps that could convert medical manufacturing, logistics, or general industrial workers into defense-relevant roles.

Conclusions from Assessments of National Security & Defense Workforce & Talent Demand Dynamics

- National security and defense remains a leading, large, and growing cluster for the Uplands region. Despite data limitations in the detail available for the national security workforce, the region's role as a major concentrated hub for engineering talent rises to the top when considering job postings, the makeup of the civilian workforce, and interviews with both NSWC Crane and its associated company and contracting communities.
- Interviews and industry and government job postings show the high-demand, high-priority, and high-volume regional context for electrical and electronic engineers and related technicians as leading occupations.
- Additional strong demand for engineering roles including for computer, microelectronics, software, mechanical, physics/radiation effects, and quality/ISO engineers.
- **Employer interviews identify gaps and challenges, including:** acute shortage of mid-career and senior cleared talent especially in microelectronics, cyber, and systems/component engineering; skills mismatches among new graduates all requiring upskilling on the job; sourcing U.S. citizen candidates, including those that can potentially hold security clearances; recurring barriers to recruiting including location, housing, and lifestyle in and around Crane and WestGate.

To address talent and skill needs, national security and defense employers are:

- Maintaining strong, existing relationships with key Indiana and Midwest region universities and engineering departments.
- Making extensive use of college internships and converting to full-time hires at strong rates.
- Helping stand up new university programs relevant to areas of need.
- Partnering with regional community and technical colleges for technician, logistics, and other certificate- and associates-level credentials.
- Scaling K-12 career exposure and awareness building.



SECTION 1D:
Healthcare Cluster Demand Profile

Regional Overview

Uplands Region's Healthcare Cluster Represents:



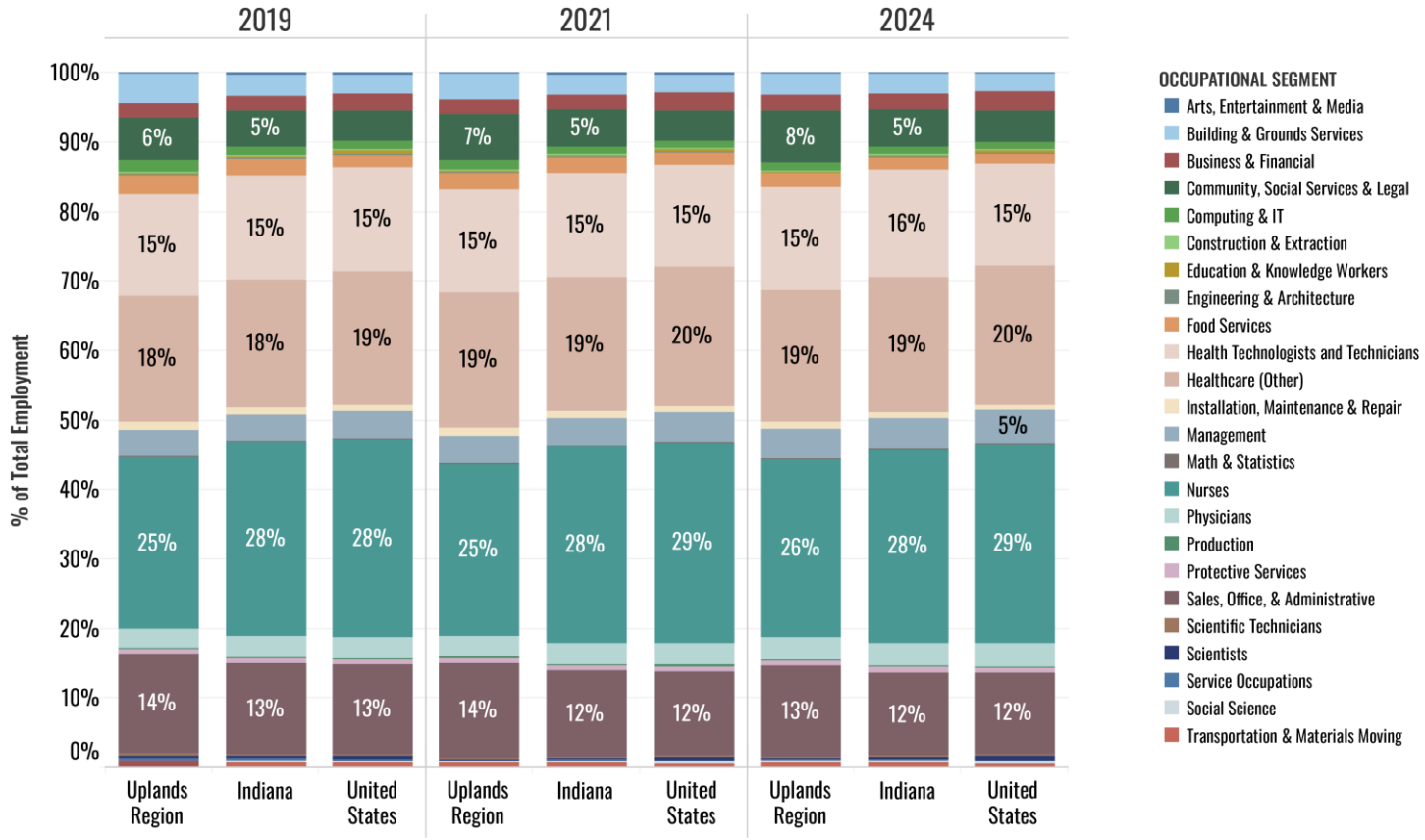
- **Industry Performance Designation:** *Emerging Strength* – large employment base, growing jobs at a rapid pace and outpacing the US since 2019 but not yet specialized in its regional concentration.
- **Leading Regional Subsectors:**
  - Hospitals & Health Systems

Source: TEConomy analysis of Bureau of Labor Statistics' QCEW data and Lightcast (Datarun 2025.2).

Workforce Profile:

Large Shares of Nursing, Medical Assistant, and Healthcare Technician Occupations Reflect State and National Concentrations

- **The Healthcare workforce makeup in the Uplands region largely reflects that of the state and the US,** although regional concentration in nursing is slightly lower.
- **Healthcare occupations are dominated by RNs and other nurses,** nursing and medical assistants, healthcare technologists and technicians, physicians, and administrative roles.

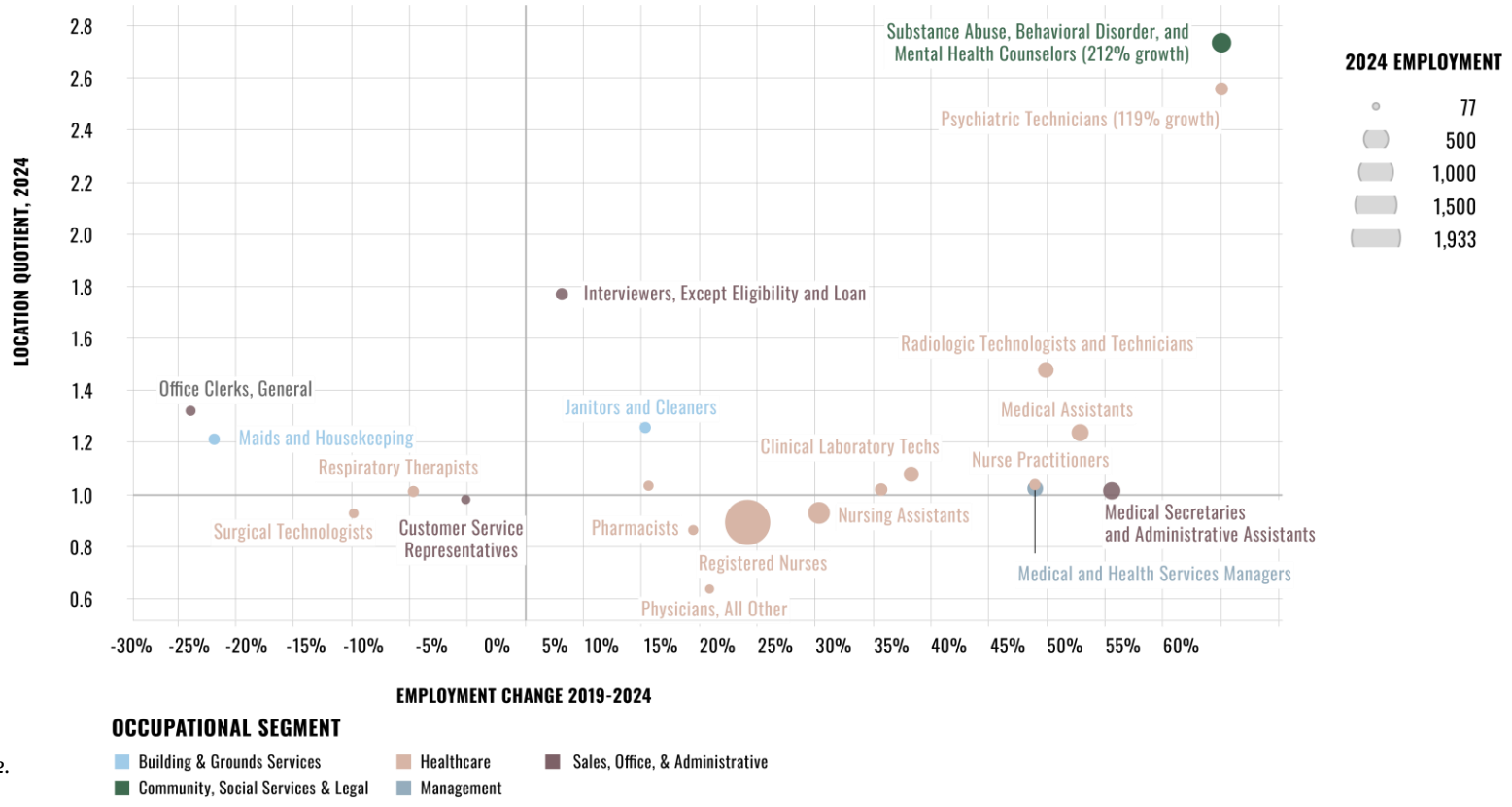


Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.
Note: Lightcast staffing patterns data does not cover federal hospital employment (which totals only 11 in the Uplands Region for 2024).

Detailed Occupational Profiles:

Nurses Have High Employment Volume and Growth But Are Relatively Under-Concentrated, While Counselors and Other Smaller Occupations Are Both Specialized and Growing

- **Highly specialized and growing Healthcare occupations** include behavioral and mental health counselors, psychiatric technicians, medical assistants, radiologic technicians, and interviewers.
- **Registered nurses and nursing assistants are growing and have the highest employment footprints,** although they are not specialized in the Healthcare sector relative to the US.

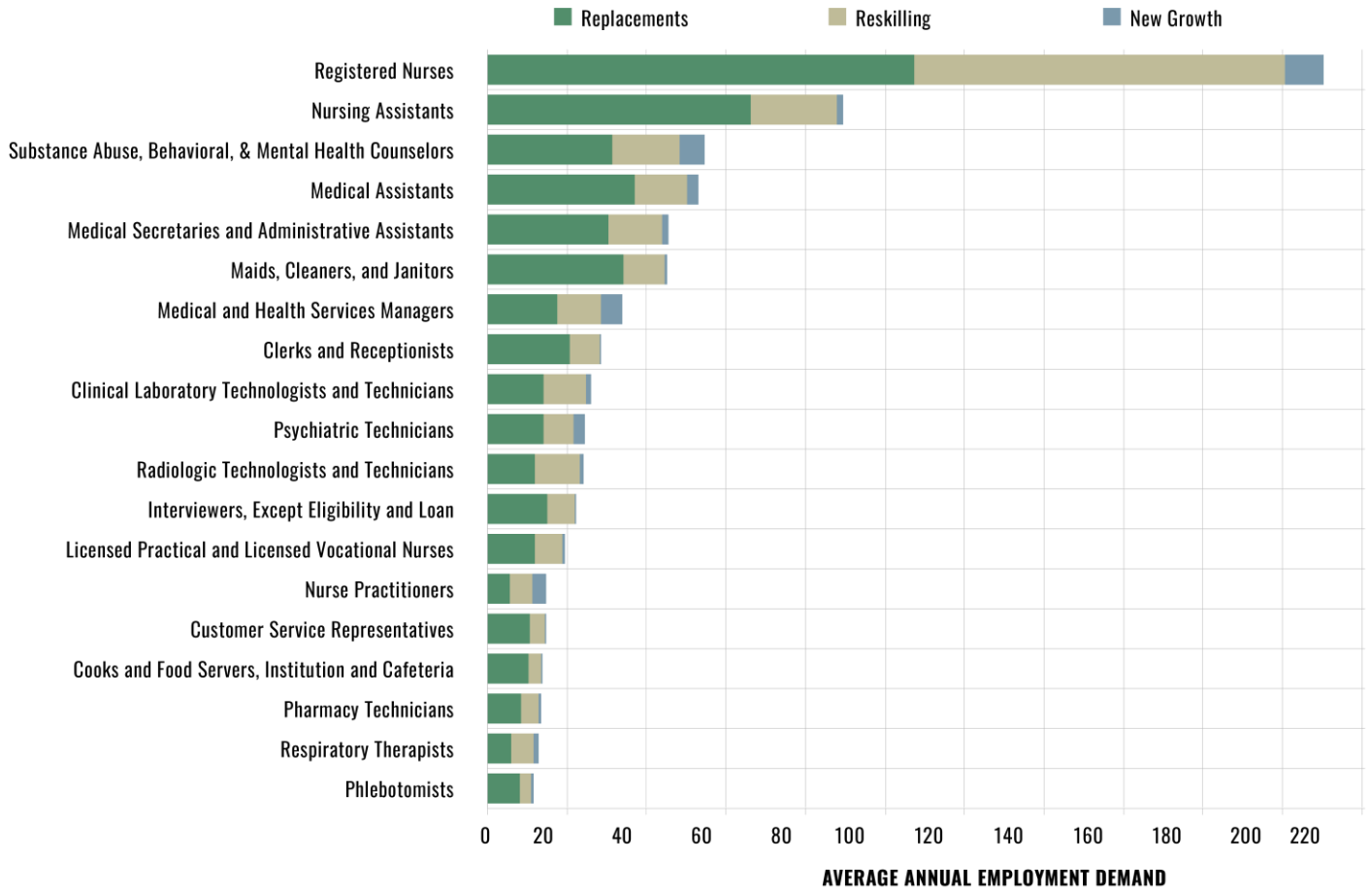


Source: TEConomy analysis of Lightcast QCEW Staffing Patterns Data, 2025.2.
Note: Lightcast staffing patterns data does not cover federal hospital employment (which totals only 11 in the Uplands Region for 2024).

Occupational Demand:

Projected Demand Indicates Continuing Importance of Nursing, Mental Health, Technician, and Support Roles

- Across Healthcare cluster occupations, there is a **projected need to fill 757 new roles annually over the next decade with an additional need to reskill or upskill 382 professionals** annually.
- Projected demand is concentrated in nursing and nursing assistants, counselors, medical assistants, health technicians, and secretarial and managerial roles.



Source: TEConomy analysis of Lightcast, 2025.2.

Workforce Demand:

Job Posting Analytics: June 2021-June 2025 Period; 6,736 Unique Uplands Region Job Postings

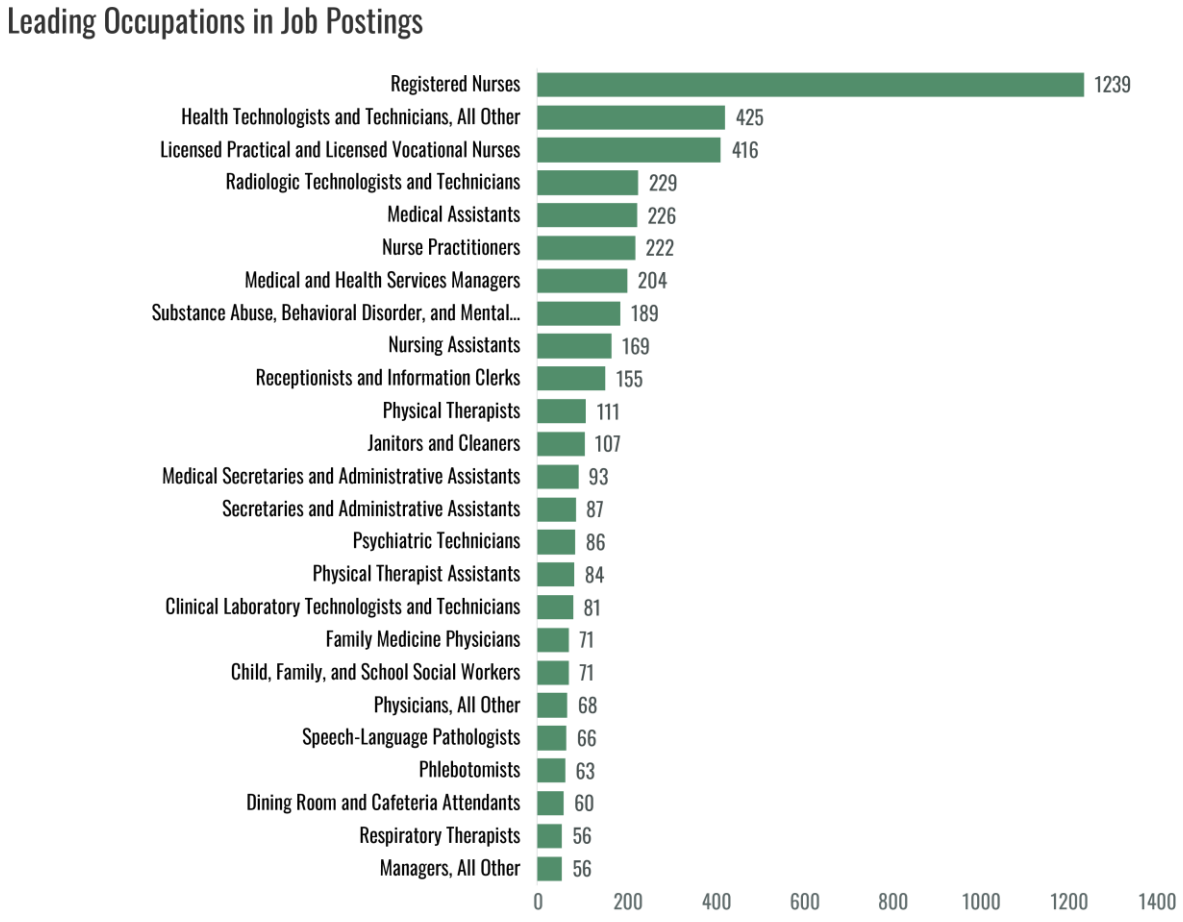
Who's Hiring?

Top Companies by Unique Job Posting Totals for June 2021-June 2025 in Descending Order; Includes Companies with 175+ Postings

- Memorial Hospital And Health Care Center
- Centerstone
- Prime Healthcare Services
- Monroe Hospital
- Bloomington Hospital
- Ascension
- Fast Pace Health
- Fresenius
- Daviess Community Hospital

What Broad Skill Levels are In-Demand?

- Low/Middle Skills (HS Diploma or GED): 27%
- Middle Skills (Associate's): 18%
- High Skills (Bachelor's +): 29%
- [No Education Listed: 26%]



Source: TEConomy analysis of Lightcast, JPA Database, 2025.3.

High-Demand, High-Priority Roles in Uplands Healthcare Industry Cluster

Shading indicates occupations that demonstrate strengths in 3 metrics or 4+ metrics

Occupation	Total Cluster Employment, 2024	Large Jobs Base	High Specialization (LQ >= 1.2)	Positive Recent Growth	Significant Projected Openings or Reskilling	Significant Presence in Recent Job Postings
Registered Nurses	1,933	✓		✓	✓	✓
Nursing Assistants	445	✓		✓	✓	✓
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	357	✓	✓	✓	✓	✓
Medical Secretaries and Administrative Assistants	283	✓		✓	✓	✓
Medical Assistants	273	✓	✓	✓	✓	✓
Medical and Health Services Managers	231			✓	✓	✓
Radiologic Technologists and Technicians	230		✓	✓		✓
Clinical Laboratory Technologists and Technicians	215			✓		✓
Psychiatric Technicians	157		✓	✓		✓
Licensed Practical and Licensed Vocational Nurses	144			✓		✓
Interviewers, Except Eligibility and Loan	139		✓	✓		
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	120		✓	✓		✓
Nurse Practitioners	115			✓		✓
Pharmacy Technicians	95			✓		
Pharmacists	94			✓		
Physicians, All Other	77			✓		
Social and Human Service Assistants	66		✓	✓		

Situational Assessment

Insights from Interviews: Healthcare

TALENT DEMAND INSIGHTS: IN-DEMAND ROLES

- Registered nurses (RNs) across inpatient units, ICU, OB, ER, and specialty areas are the largest demand driver, with continued reliance on travelers at both the critical-access and regional hospital levels.
- Allied health roles with sustained shortages include physical therapists (now doctorate-required), respiratory therapists, radiology technologists, surgical technologists (CSTs), sterile processing techs (SPTs), and licensed clinical social workers.
- Clinic and front-line roles are critical for access: certified/non-certified medical assistants (CCMAs/MAs), patient access representatives/registrars, patient care techs/assistants, and environmental services and dietary workers who often ladder into higher roles.
- Laboratory professionals—especially bachelor's-prepared medical technologists able to serve as modality leads and lab directors—are in short supply despite being required by accreditation standards.
- Physicians are a continuing priority, with particular difficulty recruiting OBGYNs and rural primary care/family medicine providers; rural hospitals rely heavily on locums and residency connections to fill these needs.

TALENT SUPPLY INSIGHTS: KEY REGIONAL PROGRAMS

- Nursing pipelines center on Ivy Tech and Vincennes (Greene County) and Ivy Tech plus IU School of Nursing (Bloomington); Ivy Tech nursing graduates are more likely to be local and stay in-region, while many IU BSN graduates return to larger metros.
  - Student nurse and Nurse Scholar programs create structured pathways from IU and Ivy Tech into local RN roles, with tuition support and guaranteed jobs in exchange for post-graduation service commitments.
  - Very close partnership with Ivy Tech and integrated clinical training model incorporating clinical rotations that is very effective and key regional partnerships for clinical placements with Vincennes University, University of Southern Indiana, Indiana University.
  - Leveraging internal student nurse/nurse extern programs during academic year – majority stay after graduation and licensure, eligible for Indiana state workforce funding programs to offset costs; also leveraging CNA to LPN to RN career ladder via paid education, bridge programs.
- K-12 and CTE partners (Twin Rivers, Hoosier Hills Career Academy, local high schools in Greene and Monroe counties) provide health careers exposure, work-based learning, and pipelines into nursing, PCAs/EMTs, maintenance, marketing, and other hospital roles.
- Specialized sources include Indiana Wesleyan and an Illinois-based online program for lab science, Wagler Education & Training Center for CCMA training, and the IU Terre Haute Rural Family Medicine residency as a key feeder for family medicine physicians.

Situational Assessment

Insights from Interviews: Healthcare

WORKFORCE GAPS & CHALLENGES

- Persistent dependence on agency/travel staff remains for RNs, CSTs, radiology technologists, respiratory therapists, SPTs, PTs, and certain specialty nurses, at 2–3× the cost of employed staff; systems have set aggressive targets to eliminate in-state travelers and reduce overall agency use.
- Role-specific shortages are acute in: OB nurses, ICU/ER nurses, physical therapists (after shift from master's to doctorate), bachelor's-level medical technologists, CCMAs for clinics (with very high turnover), and OBGYN physicians.
- Socioeconomic barriers—especially childcare cost and availability—drive churn among lower-wage CCMAs and similar roles, as many are single parents for whom daycare is either unavailable or wipes out take-home pay.
- Program misalignment exists where CTE pipelines still emphasize CNAs, even though hospitals increasingly view CNA as outdated and instead prefer hiring pre-nursing students directly into PCA roles and training them internally.
- Rural facilities (e.g., Greene County, Paoli, Bedford) struggle to attract skilled clinicians to aging facilities in small communities, especially for perinatal services, and face limited local candidate pools and competition from other markets.

FORWARD-LOOKING CONTEXT: IMPLICATIONS FOR WORKFORCE AND RECOMMENDATIONS

- The region's healthcare workforce reflects constant demand and represents a critical need for the Uplands region to address to maintain its overall quality of life to attract necessary workforce and talent other traded sectors – turnover and shortages need to be addressed via continual exposure and pipeline building programs.
- Hospitals are leaning into grow-your-own strategies: student nurse roles, CCMA upskilling via Wagler, internal patient care tech training, lateral and vertical movement from EVS/dietary into clinical and revenue-cycle roles, and intensive nurse residency/orientation models.
- Large systems are deploying robust education benefits (e.g., Guild partnership paying tuition up-front for certifications through graduate degrees, traditional tuition reimbursement, and full-tuition Nurse Scholar programs) to accelerate ASN to BSN ladders and deepen internal pipelines.
- Technical change such as EPIC rollouts, AI-enabled documentation and ambient listening, and infection-prevention initiatives drives new demand for informatics nurses, clinical project managers, and strong process/quality skills, though bedside workers mainly need workflow training rather than formal new credentials.
- Regional intermediaries (ROI, workforce boards, state programs like SkillUP/PowerUP and adult-ed funding) are best positioned to market lesser-known healthcare careers (e.g., medical technologists), advocate against unnecessary credential inflation, expand local training capacity for imaging/CST/SPT roles, and invest in childcare, housing, and rural clinical education pathways to support long-term retention.

Conclusions from Assessments of Healthcare Workforce & Talent Demand Dynamics

- The region's healthcare workforce reflects constant demand and represents a critical need for the Uplands region to address to maintain its overall quality of life to attract necessary workforce and talent other traded sectors – turnover and shortages need to be addressed via continual exposure and pipeline building programs.
- The Uplands Region's Healthcare cluster is sizable and growing its employment base. Like most regional health services sectors, the region's occupational mix and makeup is largely in-line with that for the nation—deploying large nursing and allied health workforces and others spanning nursing and medical assistants, healthcare technologists and technicians, physicians, and administrative roles.
- The region's workforce stands out in some selected occupations, with highly specialized and growing jobs for behavioral and mental health counselors, psychiatric technicians, medical assistants, and radiologic technicians.
- Counselors and psychiatric technicians are both the most specialized and fastest-growing occupations in the region, more than doubling in employment volume since 2019. This trend suggests a growing demand for skills related to mental health services.

Employer interviews identify gaps and challenges, including: persistent dependence on agency/travel staff remains for RNs and several other key roles across the ecosystem reflective of role-specific shortages in numerous healthcare occupations; some programmatic misalignment with local CTE programs and areas of need; and rural facilities struggling to attract selected roles in small communities.

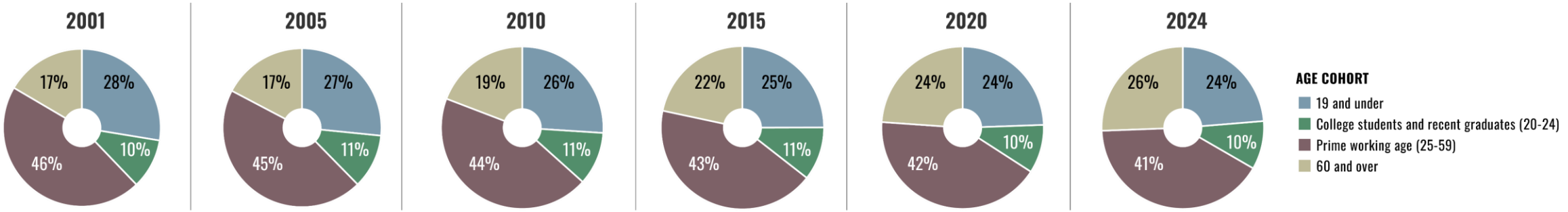
To address talent and skill needs, healthcare employers are:

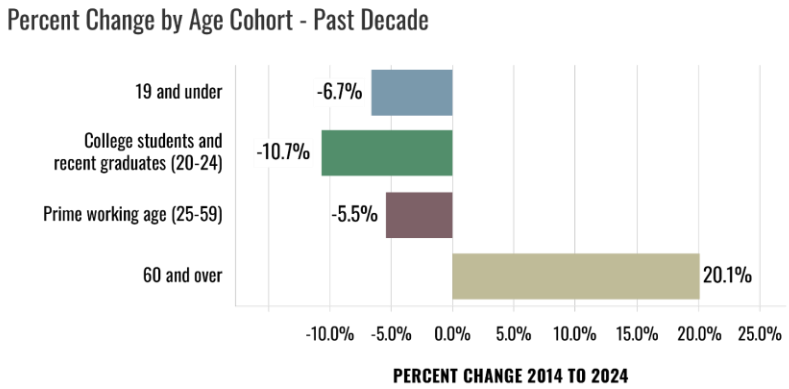
- Focusing on local, regional educational pipelines for developing nursing talent.
- Activating K-12 and CTE partners in the region for awareness and development around health-related careers.
- Leaning into "grow your own" strategies with regional hospitals elevating and skilling incumbent workers and deploying robust education benefits.

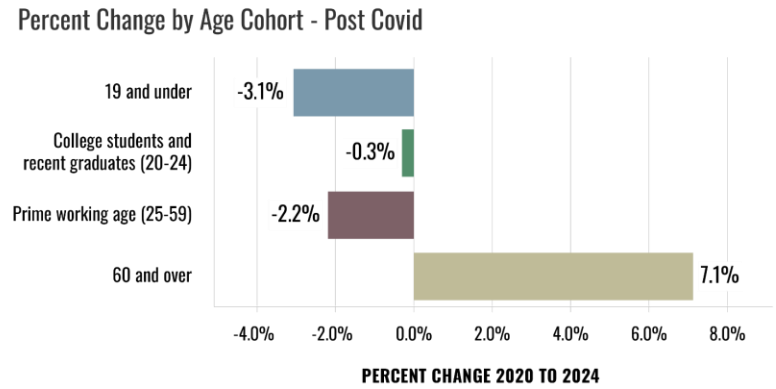


SECTION 2:
Regional Demographic, Labor Force, and Educational Trends

Population is Declining Across All Major Age Cohorts Except 60 and Over



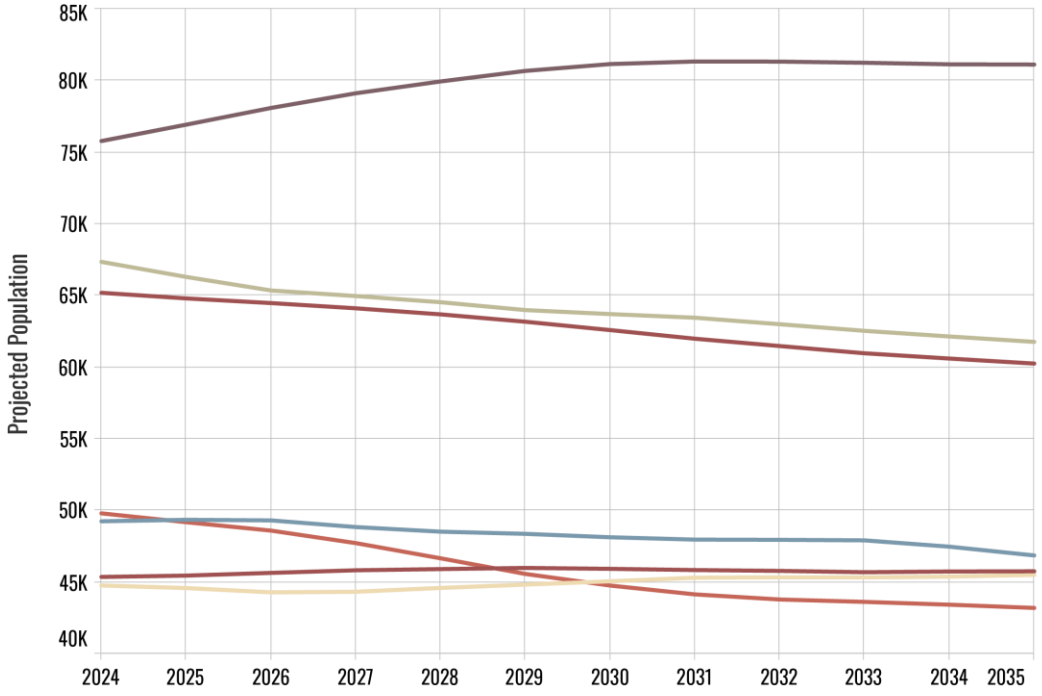


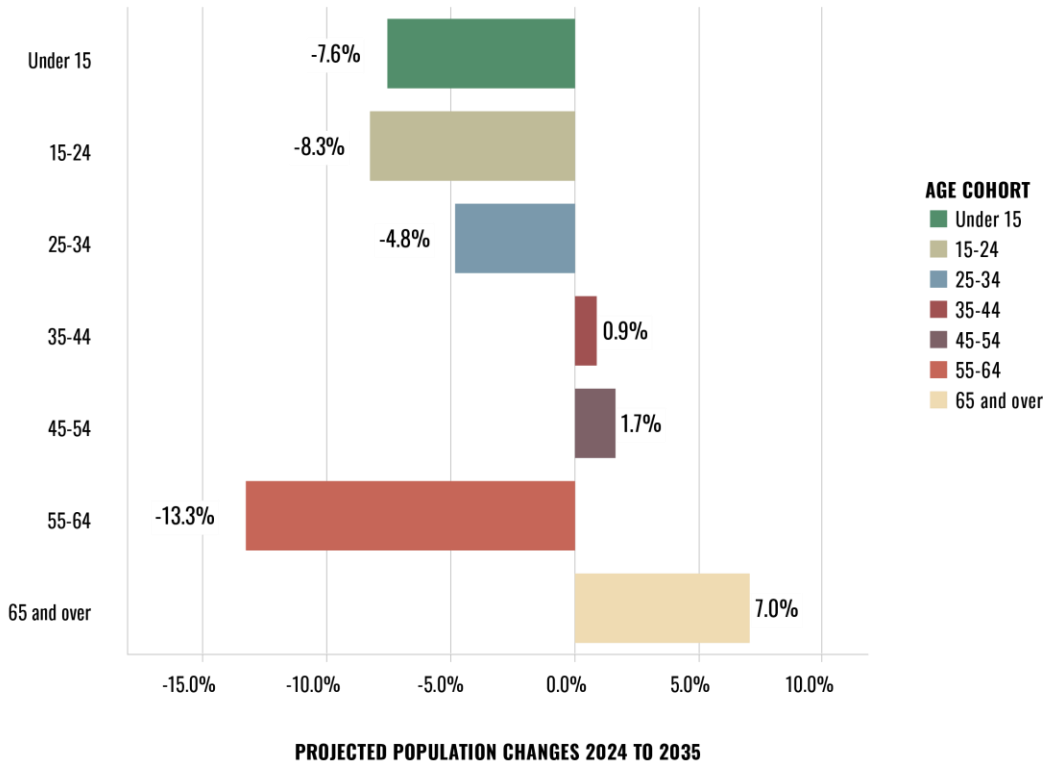


Source: TEConomy analysis of Lightcast Datarun 2025.2 (based on US Census PEP)

Uplands Population Projected to Decline Through 2035

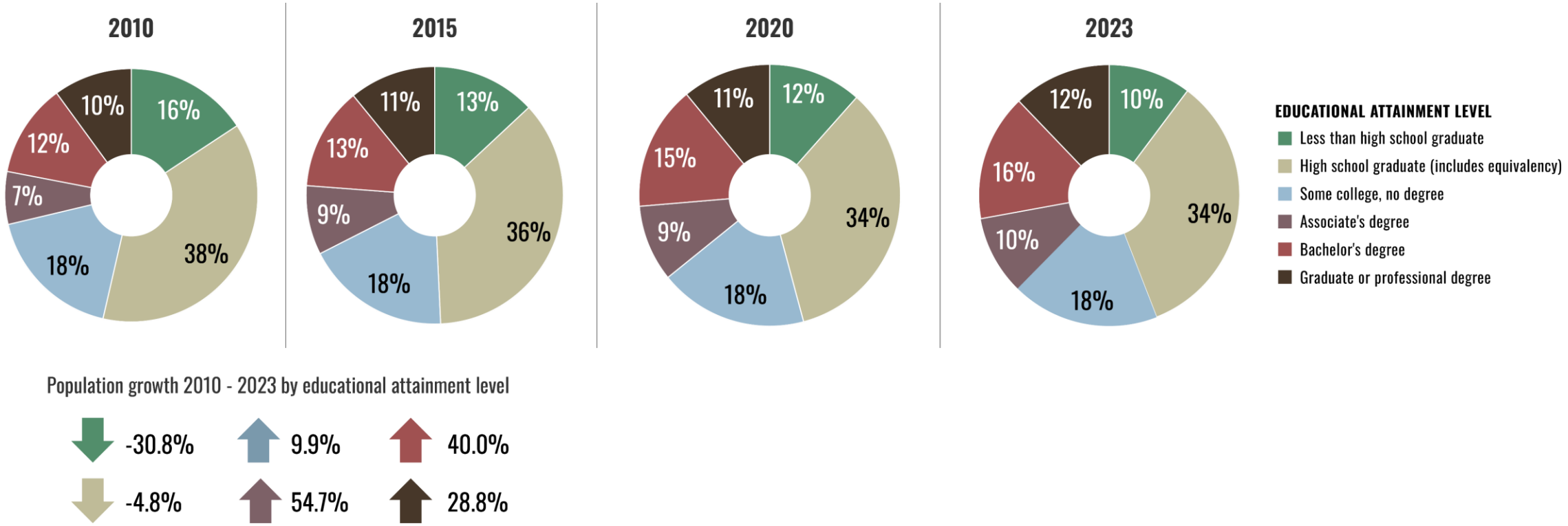
Although Ages 35-54 and over 64 are Projected to Grow





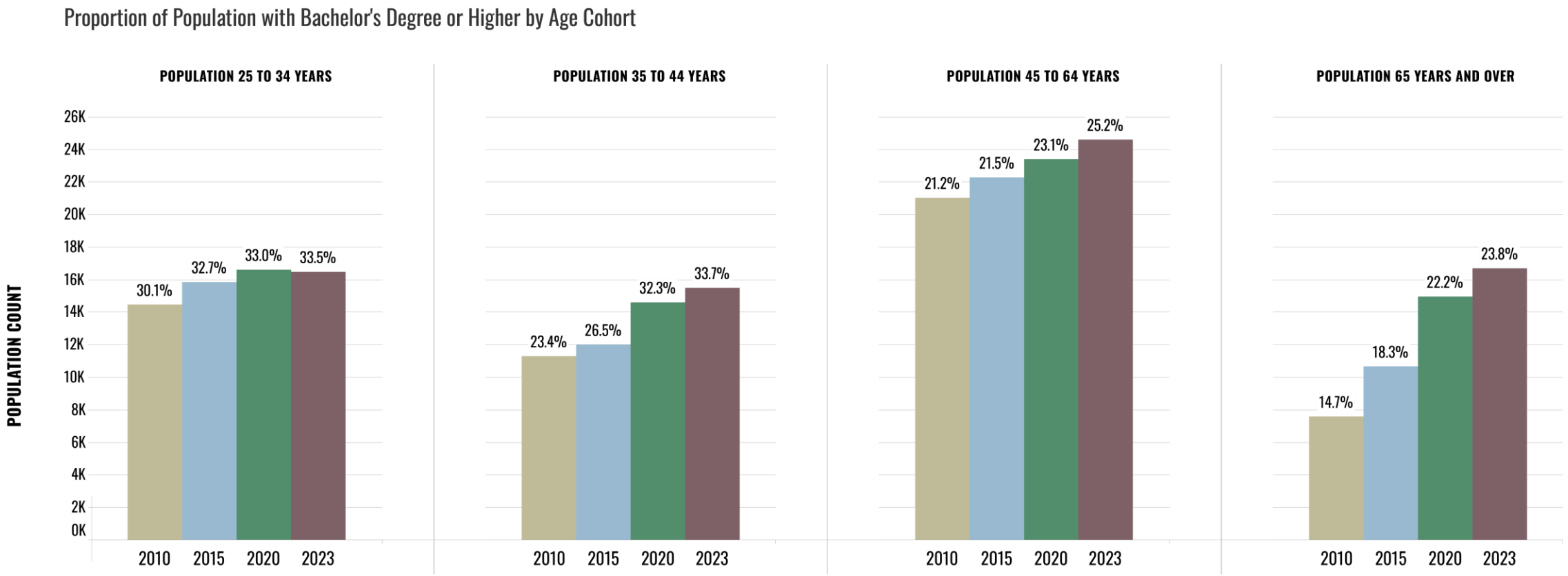
Source: TEConomy analysis of Lightcast Datarun 2025.2 (based on US Census PEP)

Proportion of Uplands Population 25+ With University Degrees Has Grown Since 2010



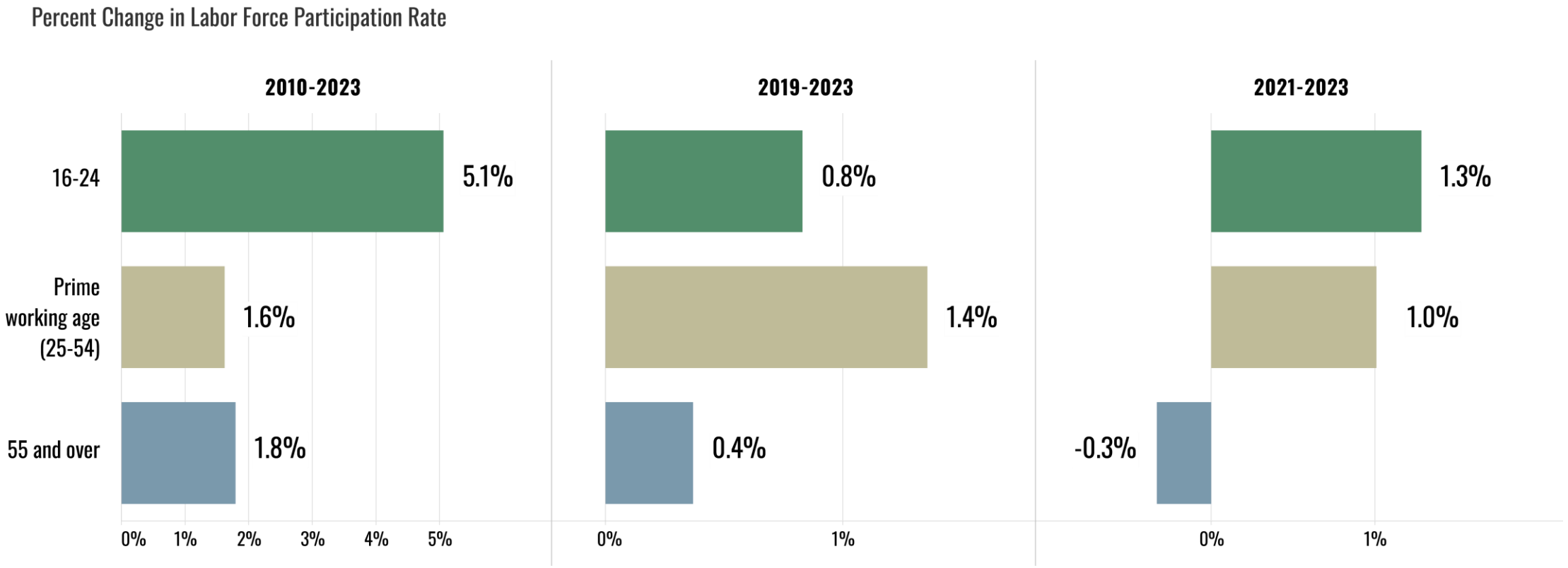
Source: TEConomy analysis of ACS 5-Year Estimates, Table S1501

Younger Populations More Likely to Have Bachelor's Degree, Although Proportion of Bachelor's Degree Holders Has Grown Across All Age Cohorts Since 2010



Source: TEConomy analysis of ACS 5-Year Estimates, Table S2301

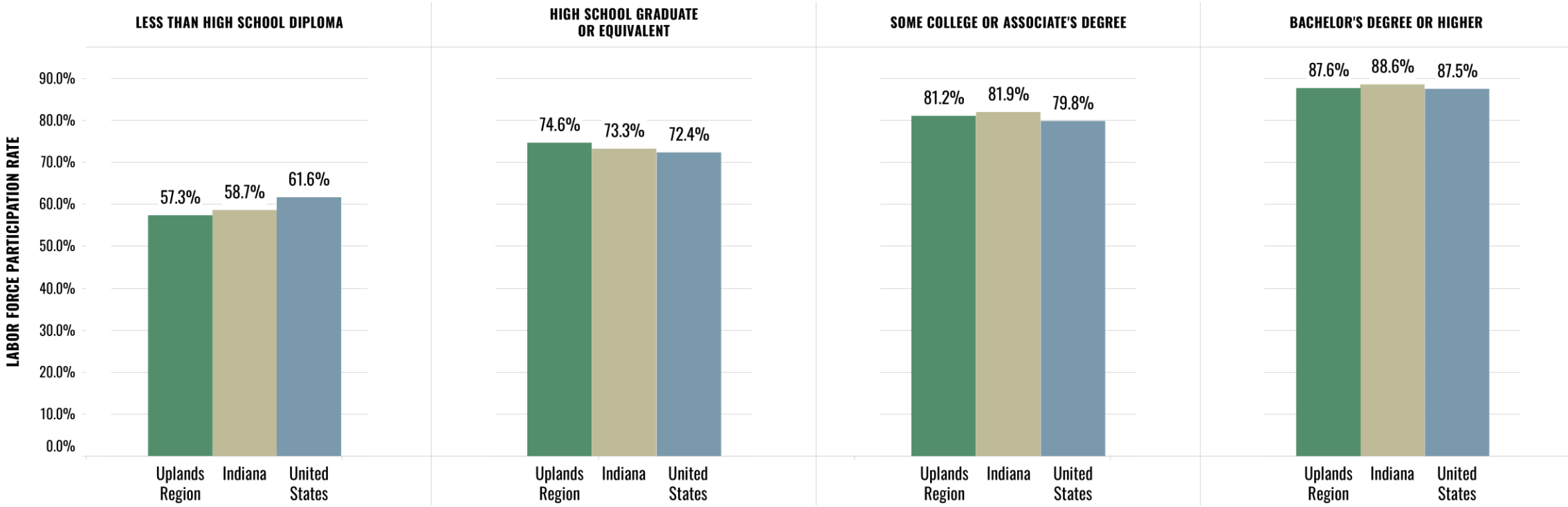
Labor Force Participation Has Grown Over Recent Years, With Some Decline Among Older Populations During Covid Years



Source: TEConomy analysis of ACS 5-Year Estimates, Table S2301

Snapshot of Labor Force Participation in 2023 by Educational Attainment: LFPRs Rise with Attainment Level

Labor Force Participation by Educational Attainment in 2023, Ages 25-64



Source: TEConomy analysis of ACS 5-Year Estimates, Table S2301

Conclusions from Analysis of Demographic Trends and Implications for Talent Supply

The regional population is aging, and the working age population is declining, indicating challenges with meeting future workforce demand.

Regional cluster employers are seeing the aging workforce firsthand, with significant emphasis in many interviews on current or upcoming replacement needs.

Positive trends in educational attainment: the proportion of Uplands residents with bachelor's degrees has increased across all age cohorts, indicating a growing share of the local population with credentials needed to meet demand in high-skilled roles.

The proportion of residents without a high school diploma is decreasing, and labor force participation is higher for more educated cohorts.



SECTION 3:
Talent Supply Dynamics and Cluster-Relevant Workforce Development Programs

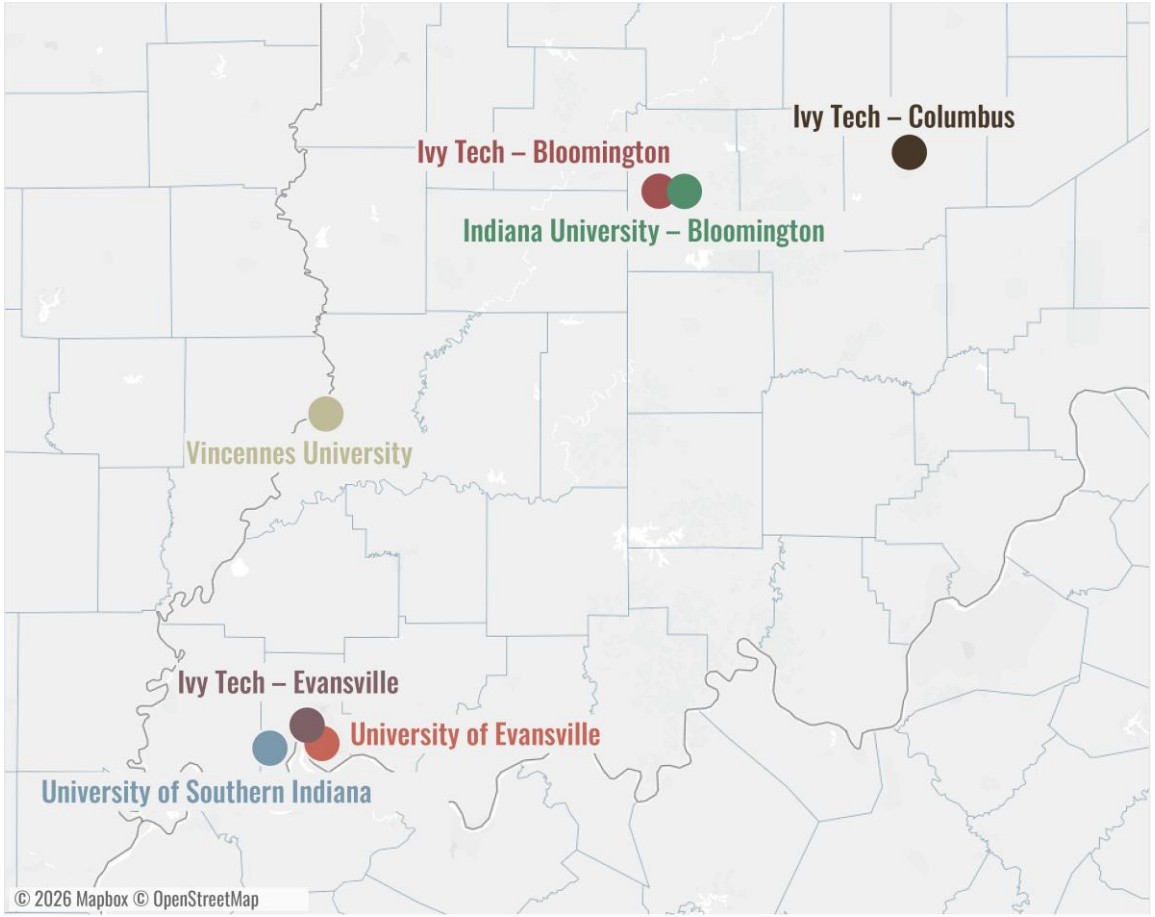
Uplands Regional Institutions Included in Analyses of Degree Graduates, Talent Supply

The “supply” of local/regional postsecondary graduates represents a primary—though far from the only—source of skilled workforce and talent for the Indiana Uplands region and its leading industry clusters.

Analysis of recent graduate totals and trends from five Uplands region institutions spanning seven campuses (Ivy Tech Community College accounts for three regional campuses) provides insights into the most “accessible” and targeted regional talent.

The five proximate institutions for which detailed degree data are available and included in this analysis at a regional level include:

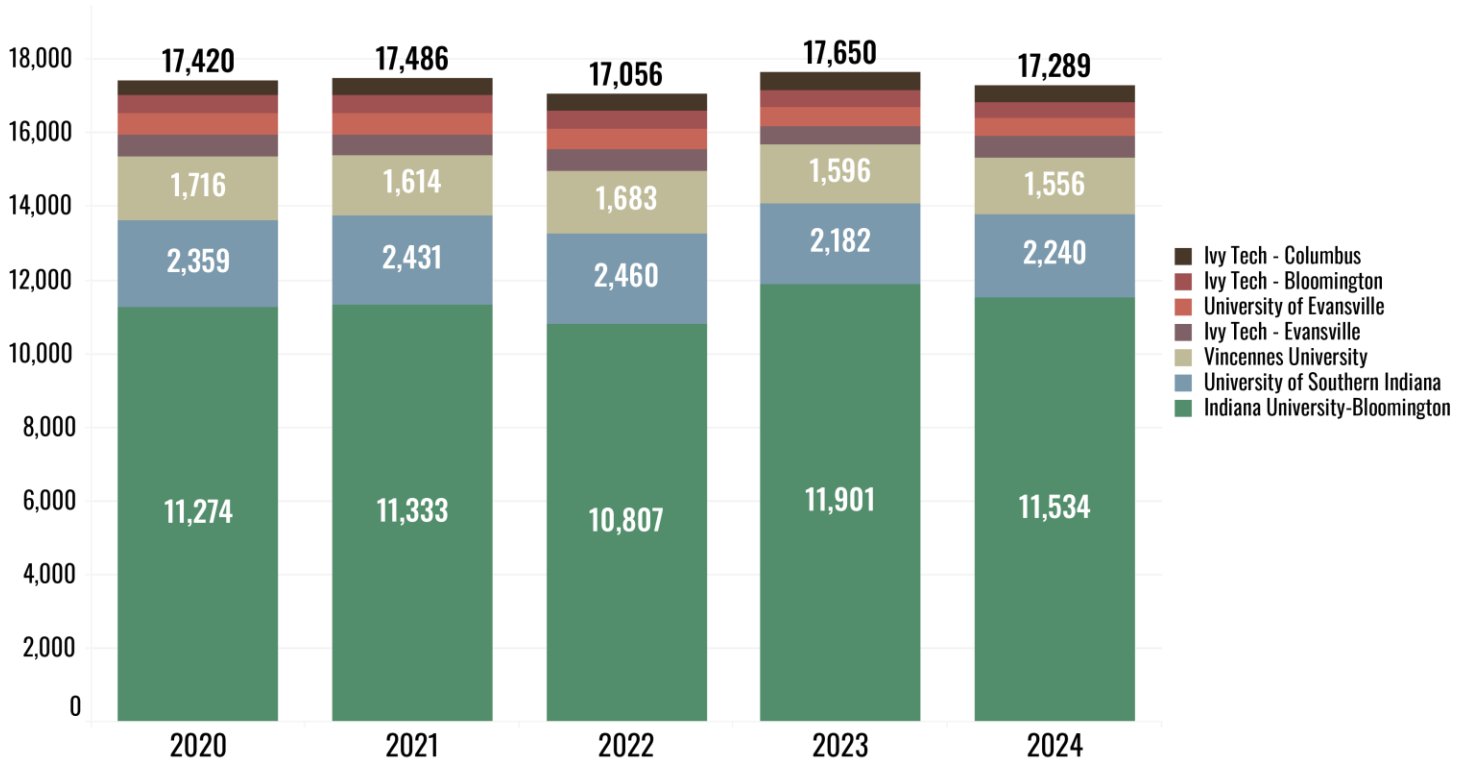
- Indiana University, Bloomington; Ivy Tech (Bloomington, Columbus, and Evansville campuses); University of Evansville; University of Southern Indiana; and Vincennes University.



Overview:

Uplands Regional Postsecondary Degrees Awarded Totaled More than 17,000 in 2024, Little Changed from 2020

Degrees Awarded at the Associate's Level & Higher, by Institution, Uplands Region, 2020-2024

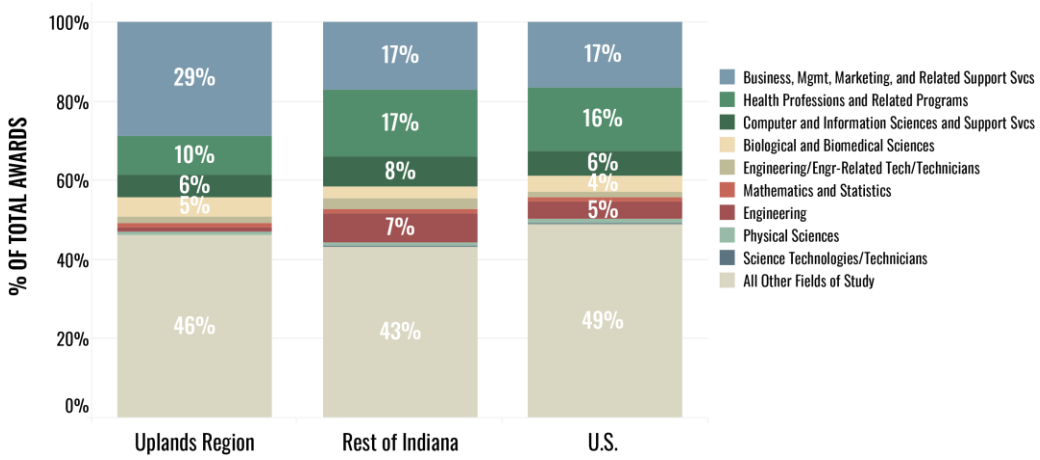


Source: TEConomy analysis of Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics; additional Ivy Tech data by campus.

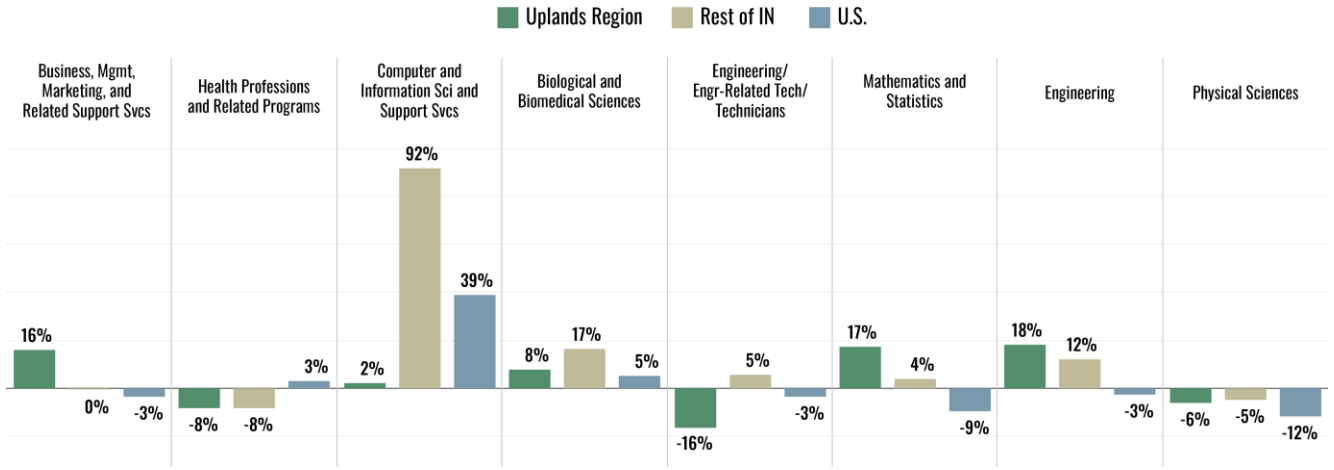
Degrees Awarded by Detailed Field of Study

Analysis of all degrees, Associate's level and higher

Share of Total Degrees Awarded by Detailed Field of Study, 2024



Change in Degrees Awarded by Major Field of Study, 2020-2024

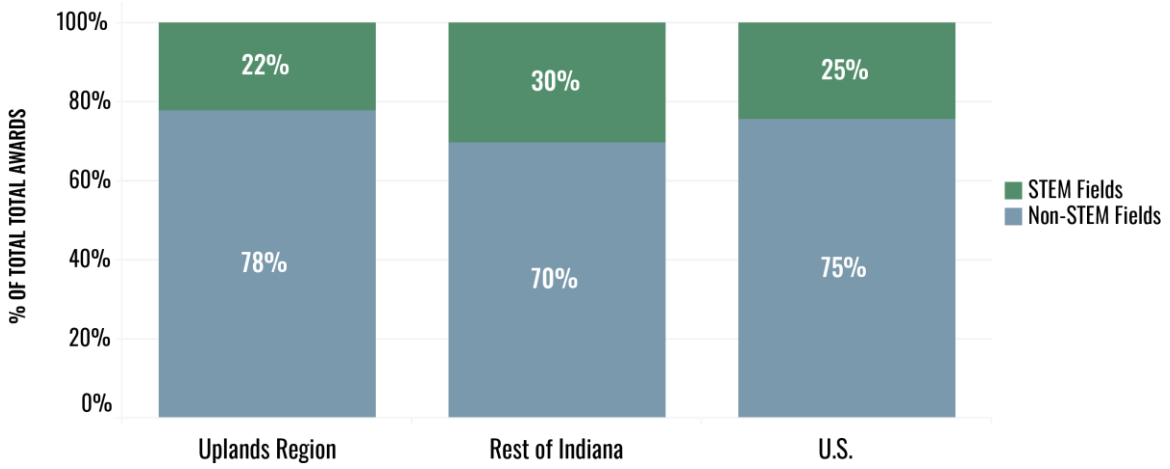


Source: TEConomy analysis of Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics; additional Ivy Tech data by campus.

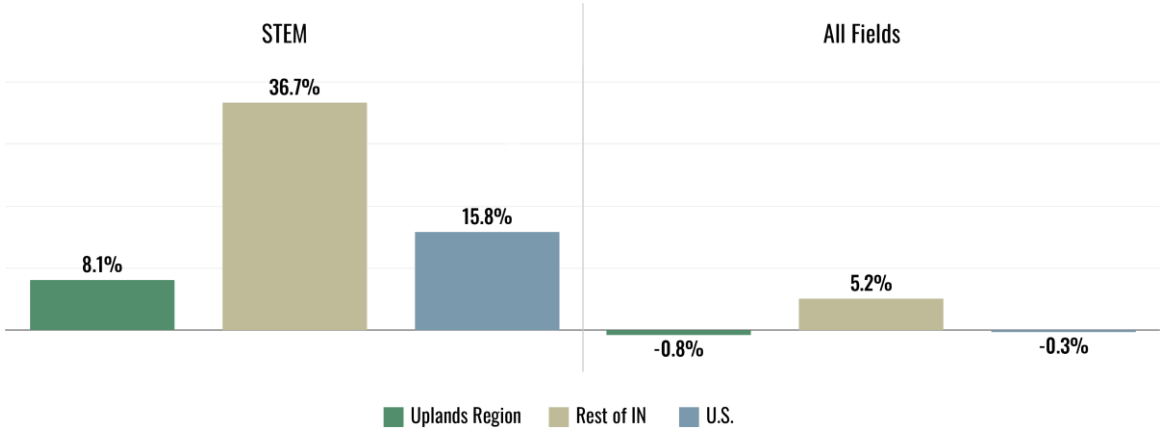
Degrees Awarded, STEM and All Fields

Analysis of all degree, Associate's level and higher

Share of Total Degrees Awarded, 2024



Growth in Degrees Awarded, 2020-2024

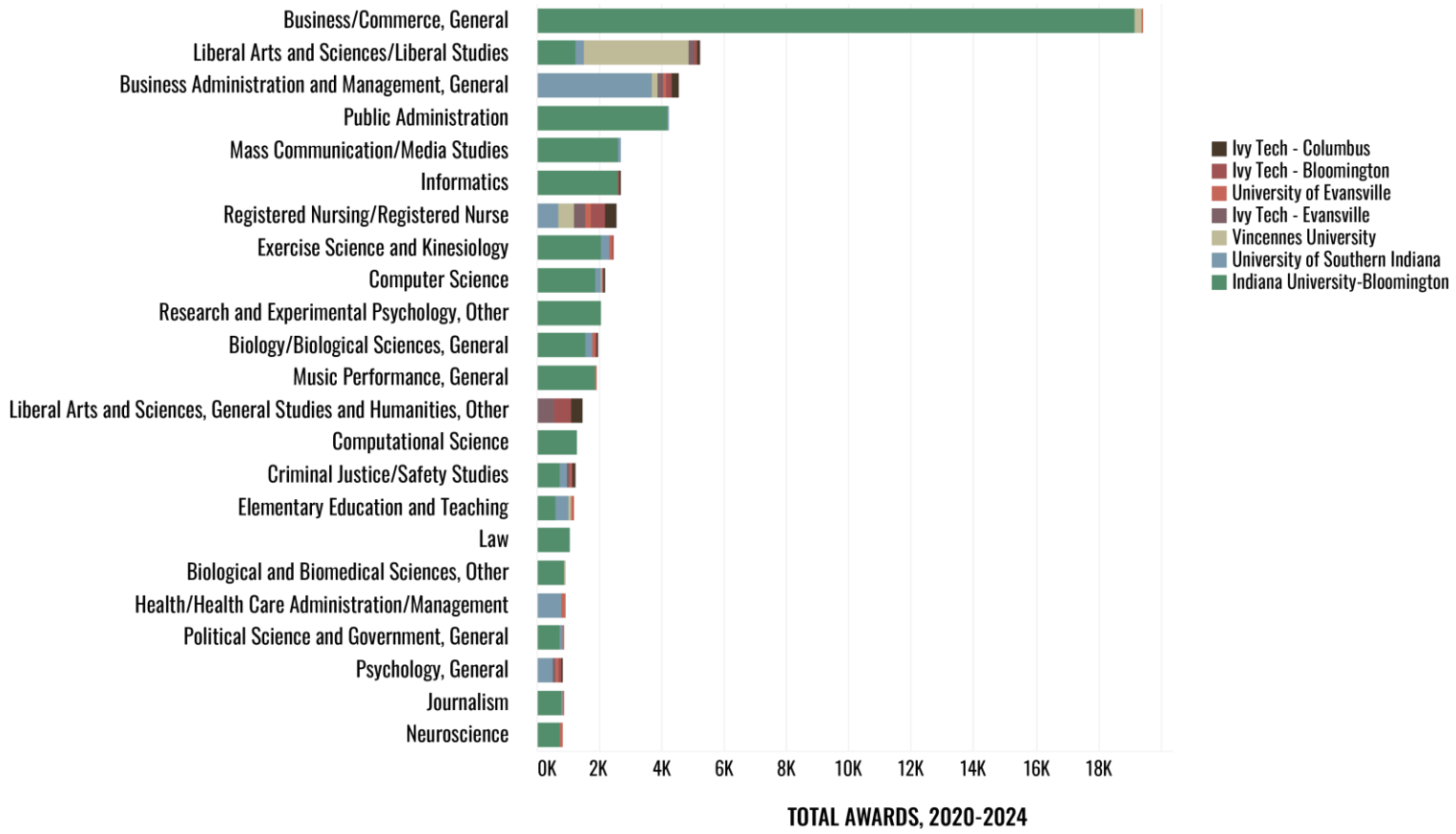


Source: TEConomy analysis of Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics; additional Ivy Tech data by campus.

Degrees Awarded, Leading Detailed Fields and Institution

Analysis of all degrees, Associate's level and higher

Degrees Awarded by Detailed Field and Institution, 2020-2024

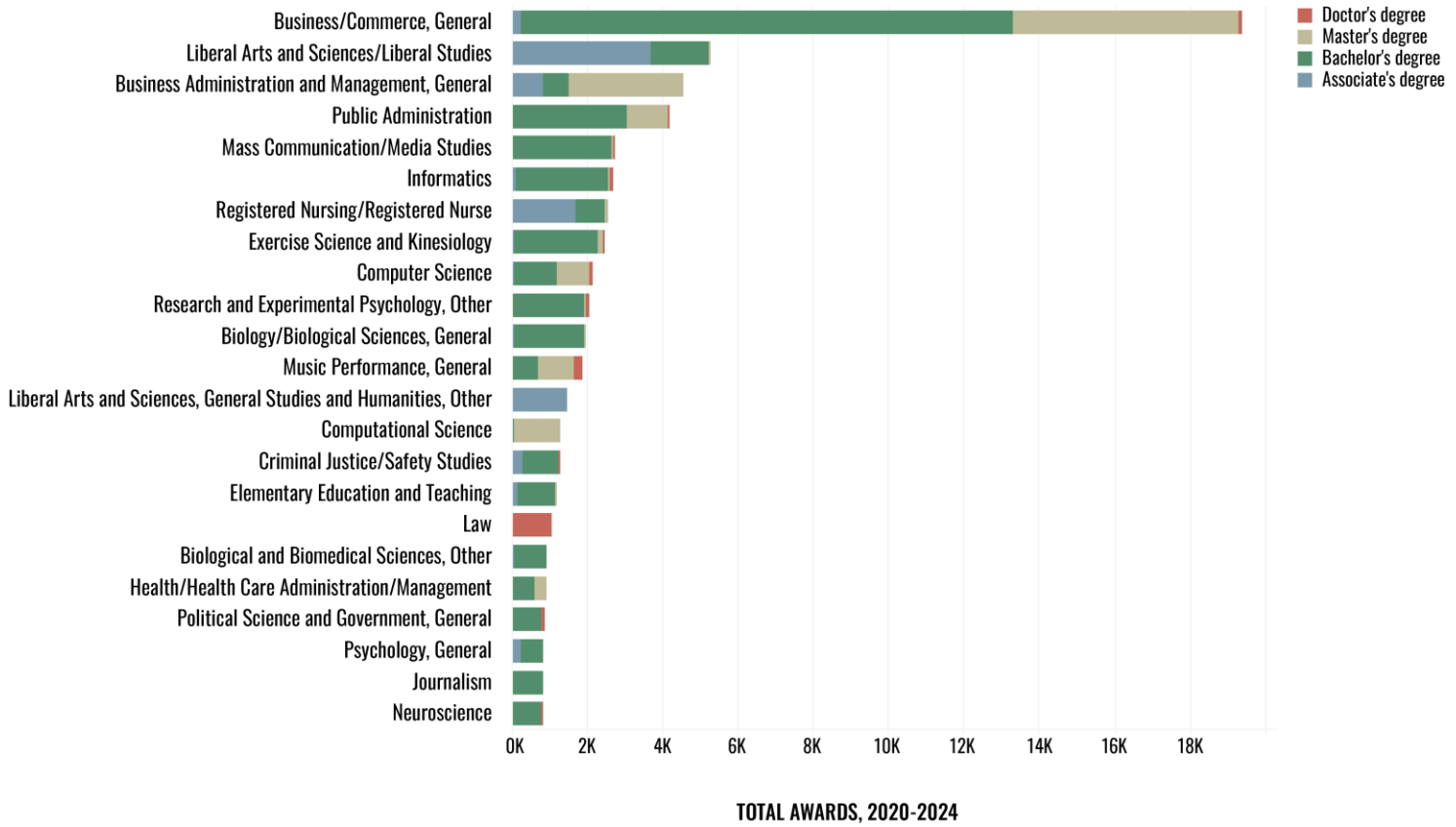


Source: TEConomy analysis of Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics; additional Ivy Tech data by campus.

Degrees Awarded, Leading Detailed Fields and Award Level

Analysis of all degrees, Associate's level and higher

Degrees Awarded by Detailed Field and Award Level, 2020-2024



Source: TEConomy analysis of Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics; additional Ivy Tech data by campus.

Employer Input:

Cited Examples of Key Regional/State Institutions and Programs Meeting Talent Supply Needs

Regional Cluster	IU-Bloomington	Ivy Tech	Vincennes University	Univ. of Southern Indiana	Purdue	Rose Hulman	Out of State Institutions
Advanced Mfg.		✓	✓				
		Industrial, Mechanical Automation	"CAP" Program				
Life Sciences	✓		✓		✓	✓	✓
	Business, HR, Financial Professionals		Precision Machining		Industrial/Mfg. Engineering	Industrial/Mfg. Engineering	Eng. Talent: UC, UD, U of L
National Security & Defense	✓	✓	✓	✓	✓	✓	✓
	Computer Sciences	Logistics Cert. Programs; Semiconductor Cert.	Logistics Cert. Programs; Semiconductor Cert.	Key internship program	Engineering Talent (EE, CE, ME primary); Defense & Security; E-Warfare	Engineering Talent (EE, CE, ME primary)	Eng. Talent: KY, MI, TN, IL, VA Institutions

Employers across clusters finding strong value in several work-based learning programs and approaches: i.e., youth apprenticeships, internships, partnerships with regional high schools, co-ops, related efforts.

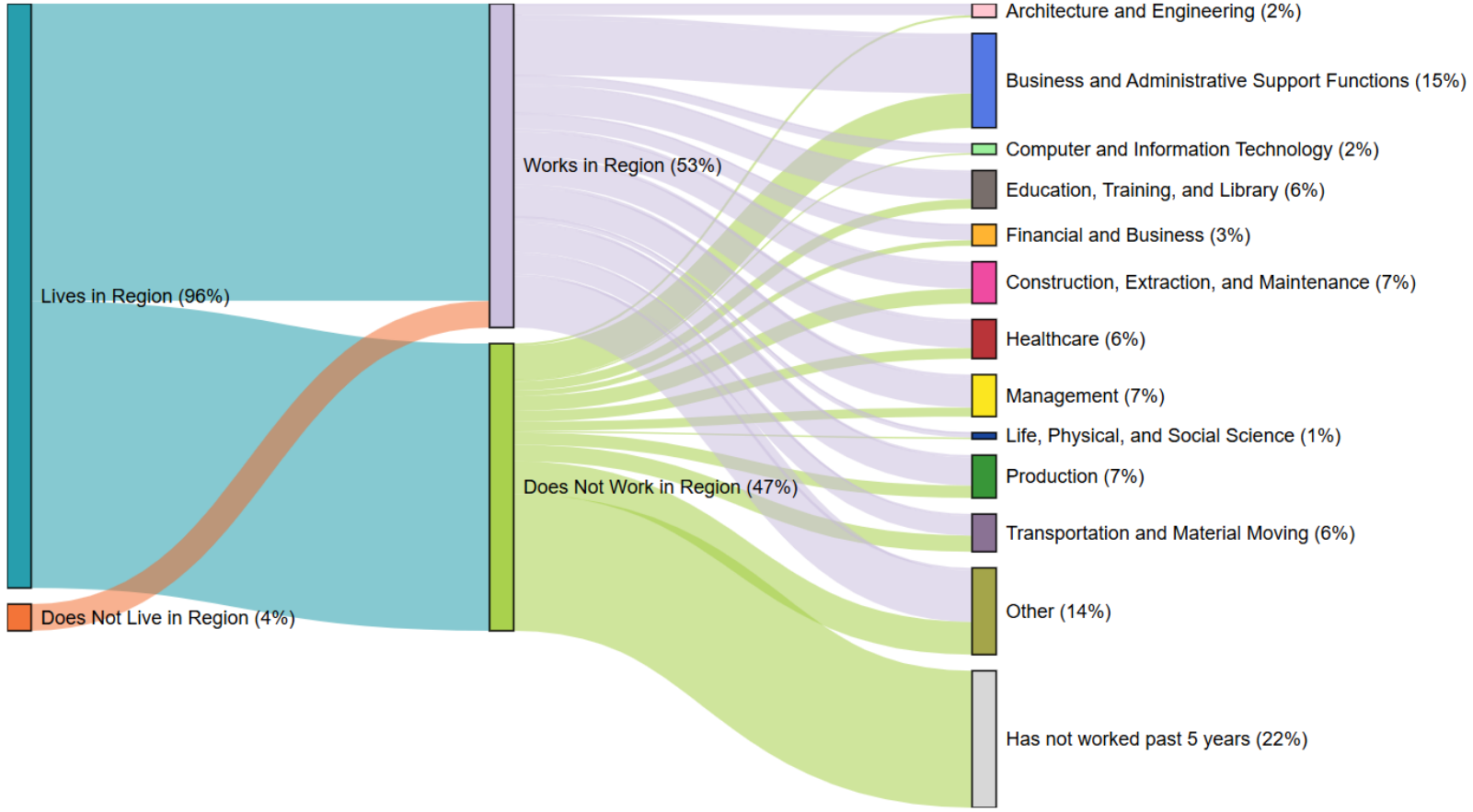
Source: TEConomy synthesis of industry cluster executive interview findings.

Occupations and Location of Employment of Working-Age Population Living or Working in the Uplands Region

The analysis finds roughly half of regional residents are working outside of the region and reveals two opportunities:

1. Aim to more intentionally tap into this workforce employed outside of the Uplands region for training, skills development, and ability to work closer to home.

2. Engage those in significant numbers that have not worked in the last 5 years and provide support for labor force re-entry, where and if interested.



TEConomy analysis of ACS PUMS 2023 5-year estimates

Profiles/Highlights of Regional Workforce & Education Programs and Initiatives Supported by ROI

Next Level Programs of Study

- Statewide secondary career and technical education courses offered by Ivy Tech.
- Allows high school students to earn dual credits, industry certifications, and postsecondary credentials.
- 70 available programs in fields like advanced manufacturing, digital technology, healthcare, and agriculture.
- Ivy Tech-Bloomington is the Uplands region location.

Ready Schools

- An ROI program that has engaged 18 Uplands school districts in a design thinking process to align their curricula with regional workforce needs.
- Ready Schools strategies include hands-on STEM and project-based learning, career exploration, student-run businesses, digital fabrication labs, and student industry certification opportunities.

Uplands Made

- A network of school-based student-run businesses, supported by ROI.
- Students in 10 school districts gain hands-on learning experience connected to Next Level Programs of Study coursework.
- ROI hosts annual student-run business conferences.

UpLabs Digital Fabrication Network

- ROI-supported digital fabrication labs at 13 Uplands schools that offer students hands-on learning experiences.
- 6,010 students have been impacted.

UpSkill Work & Learn

- 2- to 3-year youth apprenticeship program by ROI that allows high school students to earn hourly wages, industry-recognized credentials, and college credit.
- 152 youth apprentices have worked with 40 industry partners.

The Indiana Uplands Microelectronics Training Hub

- Provides students with hands-on learning experiences, technical training, applied projects, and facilities for dual enrollment coursework.
- Located at WestGate@Crane Technology Park.
- The Indiana Uplands ME High School Academy was launched in Fall 2025 as a two-year program for high school students to attend the ME Training Hub daily and earn the Ivy Tech Semiconductor Fabrication Certificate. Students can also be connected with ME apprenticeships through UpSkill Work & Learn.

Profiles/Highlights of Additional Programs and Professional Development Initiatives

Professional development for K-12 educators

- **STEM Fellowship:** A year-long professional development program by ROI to support K-8 teachers in developing STEM teaching practices and leadership skills. Of the 150 STEM Fellow alumni thus far, 89% are still teaching in the Uplands.
- **Career Coaching Fellowship:** An ROI program that offers professional development for educators to explore career opportunities across key Uplands industry clusters and support students in their paths to employment, enrollment, or enlistment. 59 teachers have completed the fellowship to date.
- T**he Center for Rural Engagement at Indiana University Bloomington:** Provides curriculum resources, professional development, partnerships, online education initiatives, training and career guidance for K-12 students and teachers. A flagship program is **ISTEAM**, which provides professional development workshops and classroom support for participating middle school art and STEM teachers to help engage students in the engineering design process.
- **The Indiana Association of Career and Technical Education Districts (IACTED):** A consortium of K-12 CTE directors that advances CTE programming across the state through shared expertise and strategic initiatives. Participating school career centers in the Uplands region include the **Hoosier Hills Career Center, North Lawrence Career Center, Lost River Career Cooperative, and Patoka Valley Career & Tech Cooperative.**

Other initiatives that include programming for adults

- **Code/IT Academy:** A free 10-week IT training program for adults, operated as a collaboration between Ivy Tech and The Mill (a non-profit coworking and entrepreneurship center in Bloomington) and funded by a READI grant through ROI. The academy offers CompTIA IT Fundamentals certification and career coaching. It has trained nearly 300 Uplands residents, many who have gone on become certified, moved into higher-wage jobs, or started new career paths.
- **Maker Mobile:** A partnership between Indiana University and ROI, the Maker Mobile is a van loaded with maker tools and prototyping equipment to encourage STEM learning in the region. The Maker Mobile has served in workshops and events for 12,964 youth and 3,662 adults in the region.

1 Herald Times, "It's Your Business: Ivy Tech Bloomington's collaborations results in benefits for all."

Conclusions from Assessments of Cluster Workforce & Talent Supply Dynamics

High-Level/Top-Line Trends:

- **Regional institutions conferred more than 17,000 total postsecondary degrees at the Associates level and higher in 2024. The overall trend for regional degree graduates, however, has remained relatively steady and little changed since 2020 (down overall by 0.8%).** Among the institutions included, IU Bloomington is by far the largest, with 11,534 total degree graduates in 2024, accounting for two of every three graduates (67%).
- **Compared against the rest of Indiana and the U.S. overall, the Uplands region has a significantly greater concentration of degree graduates in business and related fields,** which have accounted for nearly one in three (29%) total degrees awarded in 2024 compared with just 17% for these comparison geographies. Countering this outsized focus in business, which is due to IU Kelley School's position as a leading business school nationally, are relatively lower shares of degree graduates in health-related professional programs (largely due to IU's School of Medicine located outside of the region) as well as in engineering programs.
- **Despite the "flat" trend in overall regional degree graduates, Uplands region institutions are growing degree graduates in a few areas, including engineering (up 18% since 2020), math and statistics (up 17%), and business and related fields (up 16%).** While the rise in business degrees is particularly impressive given the very large existing base of students and graduates, the increases in engineering and math and statistics are on a more modest base of existing graduate activity and so should be interpreted with some caution. That acknowledged, these are positive trends for the region given its strong demand for high-skilled engineering talent.
- **These growth areas are reflective of a broader regional increase in and focus on STEM degree fields.** While the region's overall degree graduate totals have been relatively unchanged since 2020, the numbers of graduates completing a degree in a STEM-related field are up by 8.1% in the region. Despite this growth, regional institutions still maintain a lower share of overall STEM graduates relative to the rest of Indiana and the U.S., reflective, in part, of the IU School of Medicine, and the state's largest engineering institutions being located outside of the Uplands region.

Conclusions from Assessments of Cluster Workforce & Talent Supply Dynamics

Talent Supply Dynamics for Key Fields/High-Demand Roles:

What is concerning in the trends analysis is the decline of 16% in regional engineering and related technician program degree completers at the region's 2- and 4-year colleges and universities. This includes key regional education and training for associate's and bachelor's level industrial/manufacturing engineering technicians, automation engineering technicians, and electrical/electronic engineering technicians. For a region competing as a leader in advanced manufacturing clusters with these types of roles in high demand, this trend at the degree level is somewhat alarming.

- **With this recognized, the region has been making an important shift in these fields—moving somewhat away from traditional degree program graduates to more targeted, skills-specific *certificate* programs.** Importantly, what the top-line degree graduate totals do not reveal, is that regional institutions have been ramping up their certificate programs, particularly for undergraduate certificates in key advanced manufacturing related fields such as the Robotics Technology/Technician and Automation Engineering Technician programs at Vincennes University, which combined account for more than 300 certificates awarded in 2024. Further, it includes certificates awarded by Ivy Tech at its Columbus and Evansville campuses for Manufacturing Engineering Technician programs. In total, these key undergraduate certificate programs serving the region's advanced manufacturing cluster in a flexible, targeted manner have more than doubled since 2020, increasing by 166% and reaching 457 in 2024.

Conclusions from Assessments of Cluster Workforce & Talent Supply Dynamics

Talent Supply Dynamics for Key Fields/High-Demand Roles (continued):

Another key area seeing a net decline in regional degrees is health professions and related programs, with graduate totals declining by 8% since 2020 and direct implications for the healthcare cluster. Program completions in these fields, which in the region primarily span nursing, public and community health, and allied health professional degrees, totaled more than 1,700 at the associates and higher levels, but have been steadily declining since 2020 and running counter to modest increases nationally.

- Though well behind business and related degrees, nursing programs represent a leading focus for regional postsecondary students and a critical area for meeting high-demand needs of the regional healthcare cluster for skilled talent. In 2024, nursing programs account for a significant share of regional degrees in this broader health professions classification (approximately one-third) but saw a nearly 5.6% decline in graduate totals from 2020.



Conclusion:

Regional Cluster Talent Demand Is Strong, but Talent Supply Will Require More Targeted Action

Talent Demand. The Indiana Uplands' targeted industry clusters remain major drivers of the regional economy, with strong employment concentrations, continued growth in life sciences, healthcare, and national security, and sustained demand for both middle-skill and high-skill talent. Across the clusters, employers consistently point to needs in production, technical, engineering, nursing, and managerial roles, with many of these occupations showing strong current demand, projected openings, and crossover importance across multiple industries.

Talent Supply. On the supply side, the region has meaningful assets to build from: a strong network of postsecondary institutions, growing educational attainment, expanding certificate and technical training pathways, and employer-valued ROI-supported programs in career awareness and work-based learning. However, these strengths are counterbalanced by flat overall degree production, declines in some cluster-relevant fields, an aging population, and persistent recruitment and retention challenges that are especially acute in healthcare, engineering, and skilled technical roles.

Strategic Implications. Taken together, the analysis suggests a clear path forward—the region will benefit most from a workforce strategy that continues to be targeted, more connected to employers, and more focused on practical pipeline development. That means continuing to strengthen career awareness, work-based learning, targeted credentials, and employer-education coordination so the Uplands region can better align talent supply with the evolving needs of its growth clusters.



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