



Market Analysis

Getting Back to Work

San Bernardino County, California

San Bernardino Labor Market Report (Q4 2009)

Period Covered: October 2009 – December 2009

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MGS Insights and Analysis

The San Bernardino Labor Market Report (Q4 2009) is the second of four quarterly reports.

The report contains information and analysis on hiring employers and job seekers in the San Bernardino area. The ultimate goal of the data is to facilitate key stakeholders in getting San Bernardino residents back to work. The report should assist in developing the most appropriate workforce programs, recruiting tactics, and business relationships.

Research Methodology

The data used in producing this report comes from two sources: Monster Worldwide's Talent Supply and Demand database of over 100 million U.S. resumes and WANTED Technologies aggregated job posting database for the period of July 2009 through December 2009, inclusive.

Critical Insights

- Online job postings in San Bernardino County experienced a 10% seasonal drop from quarter three to quarter four, falling back to quarter two levels.
- Despite having the greatest industry job posting volume in San Bernardino County, Healthcare showed some signs of weakness in the quarter.
 - The Health Diagnosing and Treating Practitioners occupation dropped by nearly 3,000 job postings in the quarter, particularly in November and December.
 - Reflecting this loss, a supply and demand analysis revealed a sizable shift in the Healthcare Practitioners/Technical occupation, as it lost both job postings and new resumes.
- The Finance and Insurance sector made a notable surge in quarter four.
 - The industry added 624 job postings during the quarter, increasing its share from 7% to 11% and raising its rank to the third largest industry for talent demand.
 - Financial Clerks and Financial Specialists were the 10th and 11th most popular occupations in terms of job postings, each with 3% share.
 - However, as Finance talent demand surged, the talent supply declined. Finance and Insurance, representing 8% of all new industry resumes, had over 1,000 fewer resumes posted compared to the prior quarter.
- The Sales occupation made big gains in quarter four talent demand. Perhaps as organizations increased their sales staff to make year-end goals, three sales roles were the fastest growing occupations: General Sales and Related Workers (1,176); Sales Representatives, Services (337); and Supervisors, Sales Workers (280).
- Similar to the prior quarter, customer service, communication, and computer skills remained the top attributes for both talent demand and supply.
- A positive employment indication: there was continued strength in both talent supply and demand for candidates with a Master's Degree or higher; job postings rose to an 8% share while resumes rose to a 10% share.
- While the primary focus for San Bernardino employers is still junior-level candidates, the percentage of job postings for these seekers (with five years or less of work experience) is dropping: from 79% in quarter two, to 76% in quarter three, to 69% in quarter four.
- Talent supply continued to fluctuate, driven by the seasons and economic activity. Total resumes reported a typical holiday drop of 23%, slightly improved from the 27% drop in quarter four 2008.
- The largest declines in talent supply from quarter three to quarter four were in the following industries: Professional, Scientific, and Technical (-1,720); Manufacturing (-1,075); and Finance and Insurance (-1,106). Also of note, Educational Services dropped 36% of its total, or 432 resumes.
- There is a clear mismatch between recruiters' desired candidate education level and the seekers available. 42% of job postings are for candidates with at least a Bachelor's degree while only 20% of candidates have at most this degree. Conversely, 35% of candidates have at least an Associate's degree or some college course work, while only 14% of job postings are for these seekers.

San Bernardino Talent Demand Analysis

TALENT DEMAND

Talent demand for San Bernardino County dropped 10% from quarter three to quarter four 2009, falling back to quarter two levels. This decline is expected with the fourth quarter, as multiple holidays typically spawn a slower recruiting season.

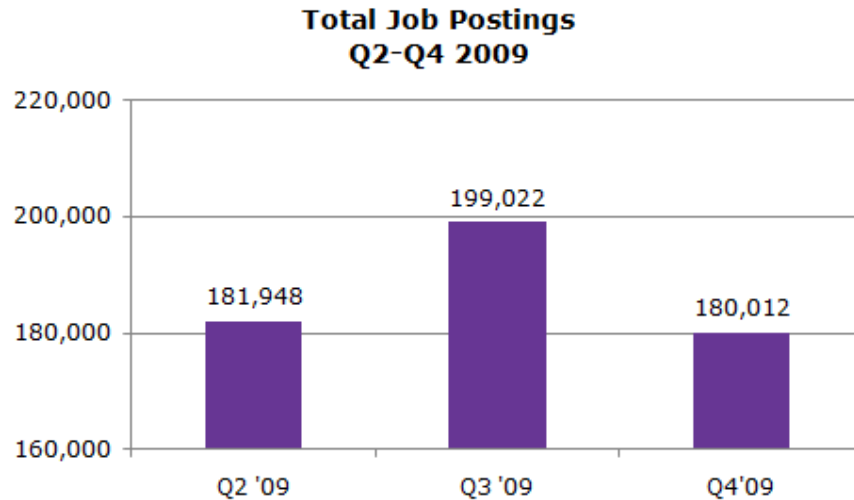


Figure 1: Total Job Postings
Source: Wanted Technologies

TALENT DEMAND BY INDUSTRY SECTOR

Listed on the next page are the top twenty industries and their percentage share of job postings for the third and fourth quarter of 2009, as well as their percentage and actual change from quarter-to-quarter.

The **greatest demand** for the period was for the following industries:

1. Health Care and Social Assistance (14%)
2. Administrative and Support and Waste Management and Remediation Services (12%)
3. Finance and Insurance (11%)
4. Retail Trade (10%)
5. Public Administration (10%)

There were several shifts from quarter three to quarter four in the top industries:

1. Administrative and Support and Waste Management and Remediation Services fell from first to second while Health Care and Social Assistance took the top spot
2. Finance and Insurance replaced Educational Services as the third largest industry
3. Retail Trade and Public Administration traded fourth and fifth rank

With a dramatic drop in job postings in November and December, Administrative and Support and Waste Management, which had been one of the fastest growing industries from quarter two to quarter three, reported the largest percentage decline and most jobs lost in quarter four.

The most significant changes in terms of actual job postings:

1. The addition of over 600 job postings in Finance and Insurance
2. A loss of over 1,700 job postings in Administrative and Support and Waste Management and Remediation Services and 525 in Health Care and Social Assistance

Demand for talent **increased** the greatest (in percentage terms) compared to the previous quarter in the following industries (excluding those with under 100 jobs):

1. Real Estate and Rental and Leasing (91%)
2. Utilities (89%)
3. Finance and Insurance (46%)
4. Accommodation and Food Services (26%)
5. Retail Trade (14%)

Note that Utilities and Accommodation and Food Services were two of the five fastest growing industries from quarter two to quarter three as well.

Demand for talent **decreased** the greatest (in percentage terms) quarter-to-quarter in the following industries (excluding those with under 100 jobs):

1. Administrative and Support and Waste Management/Remediation Services (-43%)
2. Wholesale Trade (-35%)
3. Other Services (-20%)
4. Professional, Scientific, and Technical Services (-20%)
5. Construction (-18%)

Top 20 Industries: Job Postings	Q3: Jul-Sep '09 %	Q4: Oct-Nov '09 %	Q3-Q4 % Change	Q3-Q4 Net Change
Health Care and Social Assistance	16%	14%	-17%	-525
Administrative and Support and Waste Management and Remediation Services	20%	12%	-43%	-1,711
Finance and Insurance	7%	11%	46%	624
Retail Trade	8%	10%	14%	230
Public Administration	8%	10%	7%	110
Educational Services	9%	8%	-10%	-174
Accommodation and Food Services	5%	6%	26%	250
Professional, Scientific, and Technical Services	7%	6%	-20%	-273
Manufacturing	6%	5%	-18%	-219
Real Estate and Rental and Leasing	2%	4%	91%	356
Information	3%	3%	-12%	-87
Wholesale Trade	4%	3%	-35%	-298
Other Services	2%	2%	-20%	-90
Utilities	1%	2%	89%	156
Transportation and Warehousing	1%	2%	0%	0
Arts, Entertainment, and Recreation	1%	1%	-1%	-2
Construction	1%	1%	-18%	-36
Agriculture, Forestry, Fishing and Hunting	0.04%	0.10%	100%	9
Management of Companies and Enterprises	0.02%	0.03%	50%	2
Mining, Quarrying, and Oil and Gas Extraction	0.04%	0.02%	-50%	-4

Figure 2: Top 20 Industries in Supply and Their Change

Source: Wanted Technologies

Note: This industry data represents only 10% of all job postings tracked by WANTED; the other 90% of postings has no industry indication.

TALENT DEMAND BY OCCUPATIONAL CATEGORIES

Listed below are the twenty most popular occupations and their percentage volume of job postings for the third and fourth quarter of 2009.

The top 20 occupations account for more than 66% of postings in the San Bernardino area.

Top 20 Occupations: Job Postings	Q3: Jul-Sep '09 %	Q4: Oct-Dec '09 %
Health Diagnosing and Treating Practitioners	8%	7%
Computer Specialists	7%	7%
General Sales and Related Workers	5%	6%
Entertainers and Performers, Sports and Related Workers	4%	4%
Sales Representatives, Services	4%	4%
Secretaries and Administrative Assistants	3%	3%
General Management Occupations	4%	3%
Information and Record Clerks	3%	3%
Retail Sales Workers	3%	3%
Financial Clerks	3%	3%
Financial Specialists	2%	3%
Business Operations Specialists	2%	3%
Supervisors, Sales Workers	2%	3%
Advertising, Marketing, Promotions, PR, and Sales Managers	3%	3%
Operations Specialties Managers	3%	2%
Sales Representatives, Wholesale and Manufacturing	2%	2%
Media and Communication Workers	2%	2%
Art and Design Workers	2%	2%
Motor Vehicle Operators	1%	2%
Health Technologists and Technicians	2%	2%

Figure 3: Top 20 Occupations in Supply

Source: Wanted Technologies

The table on page seven summarizes occupational growth and supply over the past two quarters for all job occupations. Job occupations are listed in alphabetical order.

Despite a 10% drop in total San Bernardino job postings, each of the following occupations **gained** over 200 job postings from quarter three to quarter four:

1. General Sales and Related Workers (1,176)
2. Sales Representatives, Services (337)
3. Supervisors, Sales Workers (280)
4. General Teachers and Instructors (268)
5. Supervisors, Food Preparation and Serving Workers (253)
6. Retail Sales Workers (242)

Each of the following occupations **lost** over 1,000 job postings from quarter three to quarter four in San Bernardino:

1. Health Diagnosing and Treating Practitioners (-2,958)
2. Advertising, Marketing, Promotions, Public Relations, and Sales Managers (-2,061)
3. Operations Specialties Managers (-1,632)
4. Computer Specialists (-1,367)
5. General Management Occupations (-1,353)

The following occupations (for any occupation representing more than 1% of total volume) reported the greatest **increases** in talent demand in percentage terms:

1. General Teachers and Instructors (35%)
2. General Sales and Related Workers (13%)
3. Supervisors, Food Preparation and Serving Workers (13%)
4. Supervisors, Sales Workers (7%)
5. Media and Communication Workers (6%)
6. Postsecondary Teachers (6%)
7. General Protective Service Workers (6%)
8. Sales Representatives, Services (5%)
9. Retail Sales Workers (5%)
10. Motor Vehicle Operators (4%)
11. Financial Specialists (4%)
12. Food and Beverage Serving Workers (2%)
13. Entertainers and Performers, Sports and Related Workers (2%)
14. General Production Occupations (1%)

The following occupations (for any occupation representing more than 1% of total volume) reported the greatest **decreases** in talent demand in percentage terms:

1. Occupational and Physical Therapist Assistants and Aides (-42%)
2. Advertising, Marketing, Promotions, Public Relations, and Sales Managers (-32%)
3. Operations Specialties Managers (-30%)
4. Supervisors, Production Workers (-30%)
5. Primary, Secondary, and Special Education School Teachers (-29%)
6. General Office and Administrative Support Workers (-27%)
7. Top Executives (-23%)
8. General Management Occupations (-20%)
9. Health Diagnosing and Treating Practitioners (-20%)
10. Social Scientists and Related Workers (-19%)
11. Personal Appearance Workers (-18%)
12. Material Recording, Scheduling, Dispatching, and Distributing Workers (-17%)
13. Material Moving Workers (-16%)
14. Media and Communication Equipment Workers (-15%)
15. Vehicle and Mobile Equipment Mechanics, Installers, and Repairers (-14%)
16. Construction Trades Workers (-14%)
17. Health Technologists and Technicians (-13%)
18. Cooks and Food Preparation Workers (-13%)
19. Engineers (-13%)
20. Financial Clerks (-13%)

Occupation Title	Q3 % Ttl	Q4 % Ttl	Q3 - Q4 % Change	Q3 - Q4 Net Change
Advertising, Marketing, Promotions, PR, & Sales Managers	3%	3%	-32%	-2,061
Art and Design Workers	2%	2%	-9%	-320
Building Cleaning and Pest Control Workers	1%	1%	-5%	-91
Business Operations Specialists	2%	3%	-3%	-127
Computer Specialists	7%	7%	-11%	-1,367
Construction Trades Workers	1%	1%	-14%	-283
Cooks and Food Preparation Workers	1%	1%	-13%	-173
Counselors, Social Workers, & Community/Social Svc Specialists	1%	1%	-4%	-82
Engineers	2%	2%	-13%	-381
Entertainers and Performers, Sports and Related Workers	4%	4%	2%	133
Financial Clerks	3%	3%	-13%	-704
Financial Specialists	2%	3%	4%	154
Food and Beverage Serving Workers	1%	1%	2%	36
General Healthcare Support Occupations	1%	2%	-7%	-198
General Installation, Maintenance, and Repair Occupations	1%	1%	-10%	-216
General Management Occupations	4%	3%	-20%	-1,353
General Office and Administrative Support Workers	2%	1%	-27%	-798
General Personal Care and Service Workers	2%	2%	-6%	-168
General Production Occupations	1%	1%	1%	12
General Protective Service Workers	1%	1%	6%	71
General Sales and Related Workers	5%	6%	13%	1,176
General Teachers and Instructors	0%	1%	35%	268
Health Diagnosing and Treating Practitioners	8%	7%	-20%	-2,958
Health Technologists and Technicians	2%	2%	-13%	-443
Information and Record Clerks	3%	3%	-9%	-524
Lawyers, Judges, and Related Workers	1%	1%	-7%	-94
Material Moving Workers	1%	1%	-16%	-230
Material Recording, Scheduling, Dispatching, & Distributing Workers	1%	1%	-17%	-293
Media and Communication Equipment Workers	1%	1%	-15%	-375
Media and Communication Workers	2%	2%	6%	186
Metal Workers and Plastic Workers	1%	1%	-8%	-99
Motor Vehicle Operators	1%	2%	4%	107
Occupational and Physical Therapist Assistants and Aides	1%	1%	-42%	-618
Operations Specialties Managers	3%	2%	-30%	-1,632
Personal Appearance Workers	1%	1%	-18%	-458
Postsecondary Teachers	1%	1%	6%	100
Primary, Secondary, and Special Education School Teachers	2%	1%	-29%	-866
Retail Sales Workers	3%	3%	5%	242
Sales Representatives, Services	4%	4%	5%	337
Sales Representatives, Wholesale and Manufacturing	2%	2%	-7%	-285
Secretaries and Administrative Assistants	3%	3%	-1%	-86
Social Scientists and Related Workers	1%	1%	-19%	-266
Supervisors, Food Preparation and Serving Workers	1%	1%	13%	253
Supervisors, Office and Administrative Support Workers	1%	1%	-10%	-155
Supervisors, Production Workers	1%	1%	-30%	-412
Supervisors, Sales Workers	2%	3%	7%	280
Top Executives	1%	1%	-23%	-384

Figure 4: San Bernardino Occupation Growth and Supply Source: Wanted

TALENT DEMAND SKILLS IN DEMAND

We conducted a detailed content analysis of employer's job postings to determine critical skills in demand.

The chart on the next page indicates specific hard skills in demand by employers for quarters three and four. Hard skills are technical requirements of a job or activities that are teachable, often requiring on-the-job training or more formal education such as that provided by a college or university.

There are a few notable changes from quarter-to-quarter:

- Design, Type/Typing, and Driver/Driving declined as a percentage of hard skills in quarter four
- Software was the only category to show significant expansion in quarter four; some of the change could be attributed to the shift from Computer Skills to Software

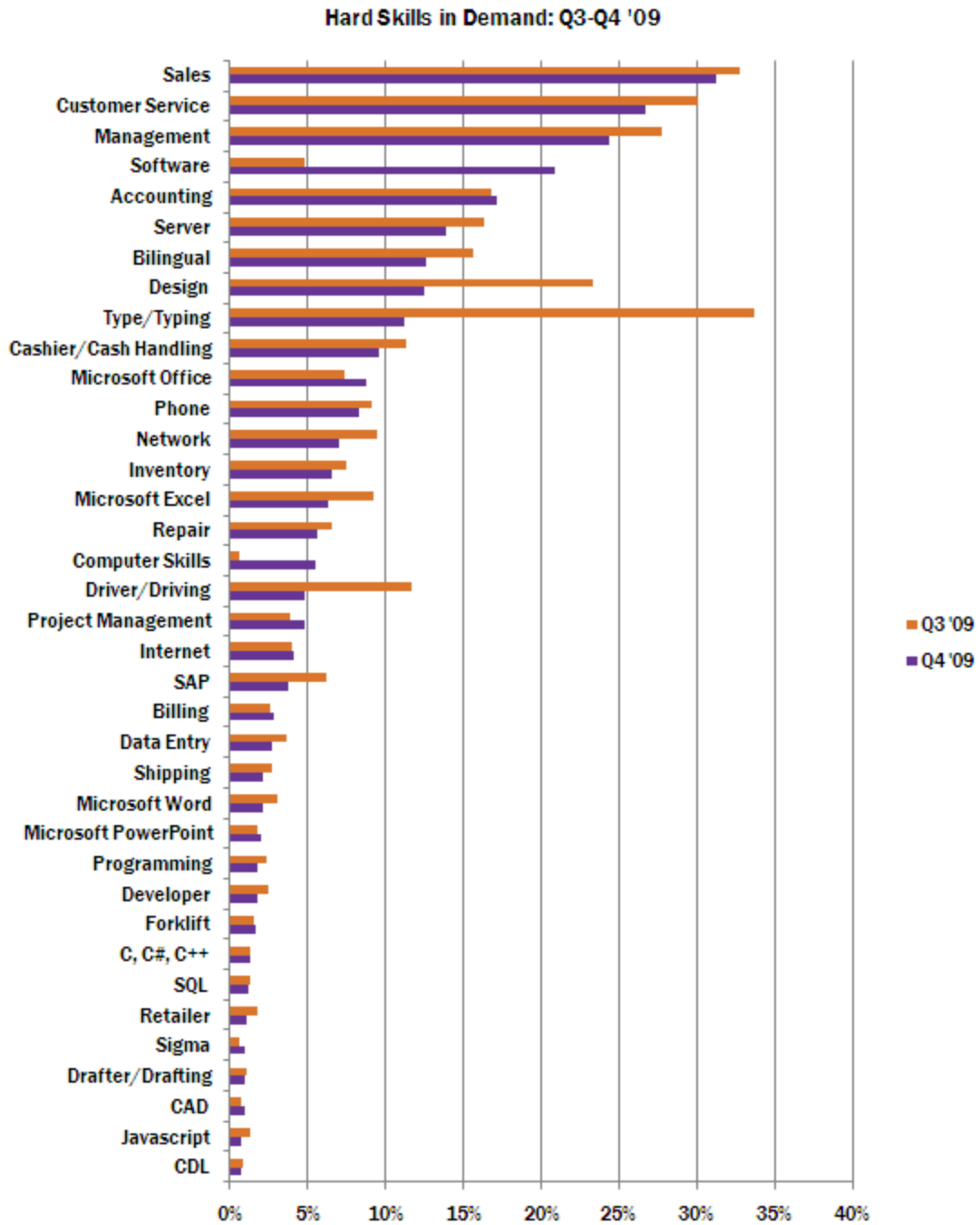


Figure 5: Hard Skills in Demand: Q3-Q4 '09

Source: Monster Worldwide

The chart below indicates specific skills in demand within the **Healthcare and Social Assistance** industry sector and their changes from quarter three to quarter four.

Nursing, customer service, and communication skills remain at the top of the list.

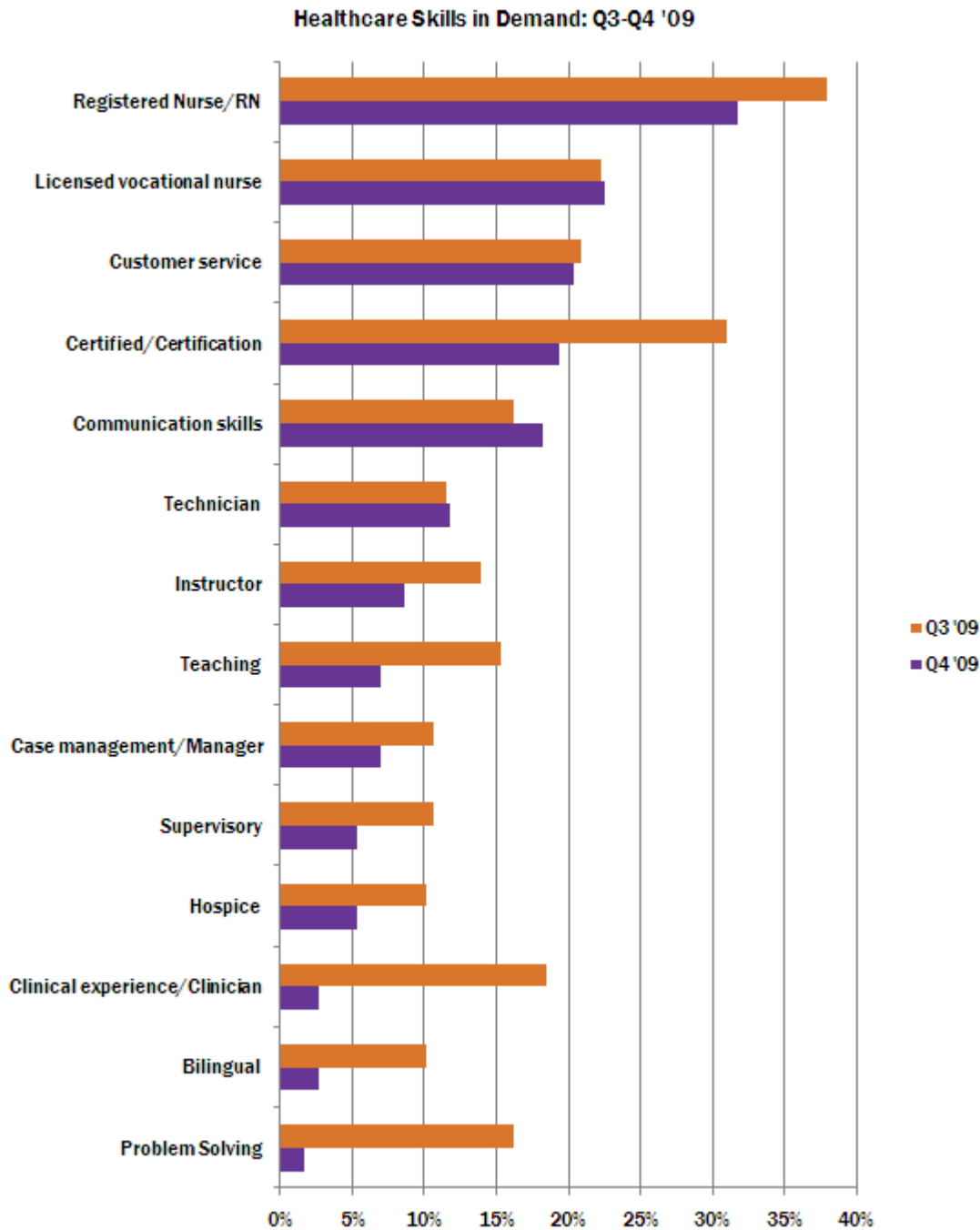


Figure 6: Skills in Demand – Healthcare and Social Assistance: Q3-Q4 '09
 Source: Monster Worldwide

The chart below indicates specific skills in demand within the **Customer Service Representative** occupation.

Computer, telephone, communication, and customer skills remain top customer service representative desired skills.

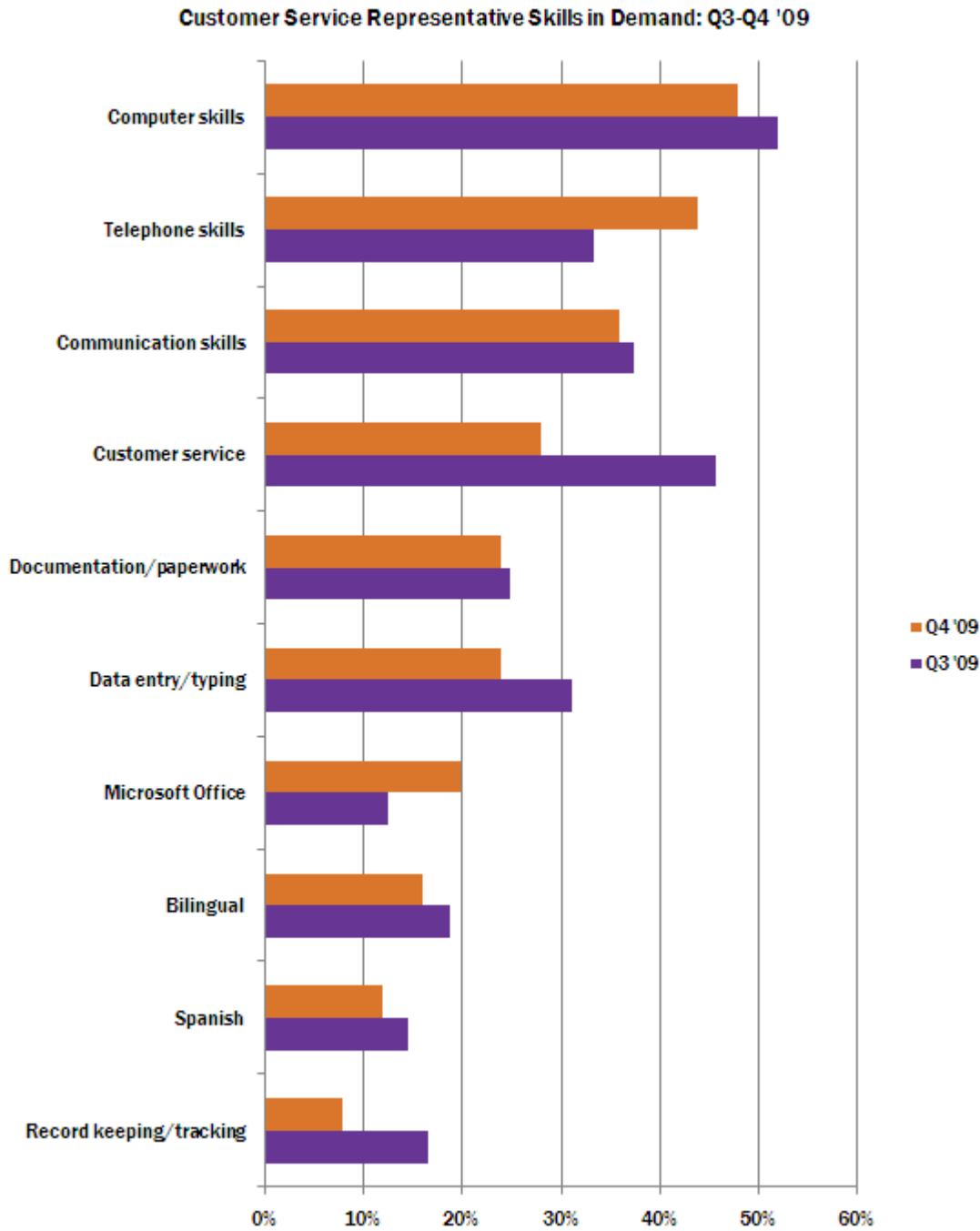


Figure 7: Skills in Demand – Customer Service Representative: Q3-Q4 '09
 Source: Monster Worldwide

The chart below indicates specific skills in demand within **Sales** and related occupations. Customer service and communication skills were most prevalent in sales job postings in quarter four.

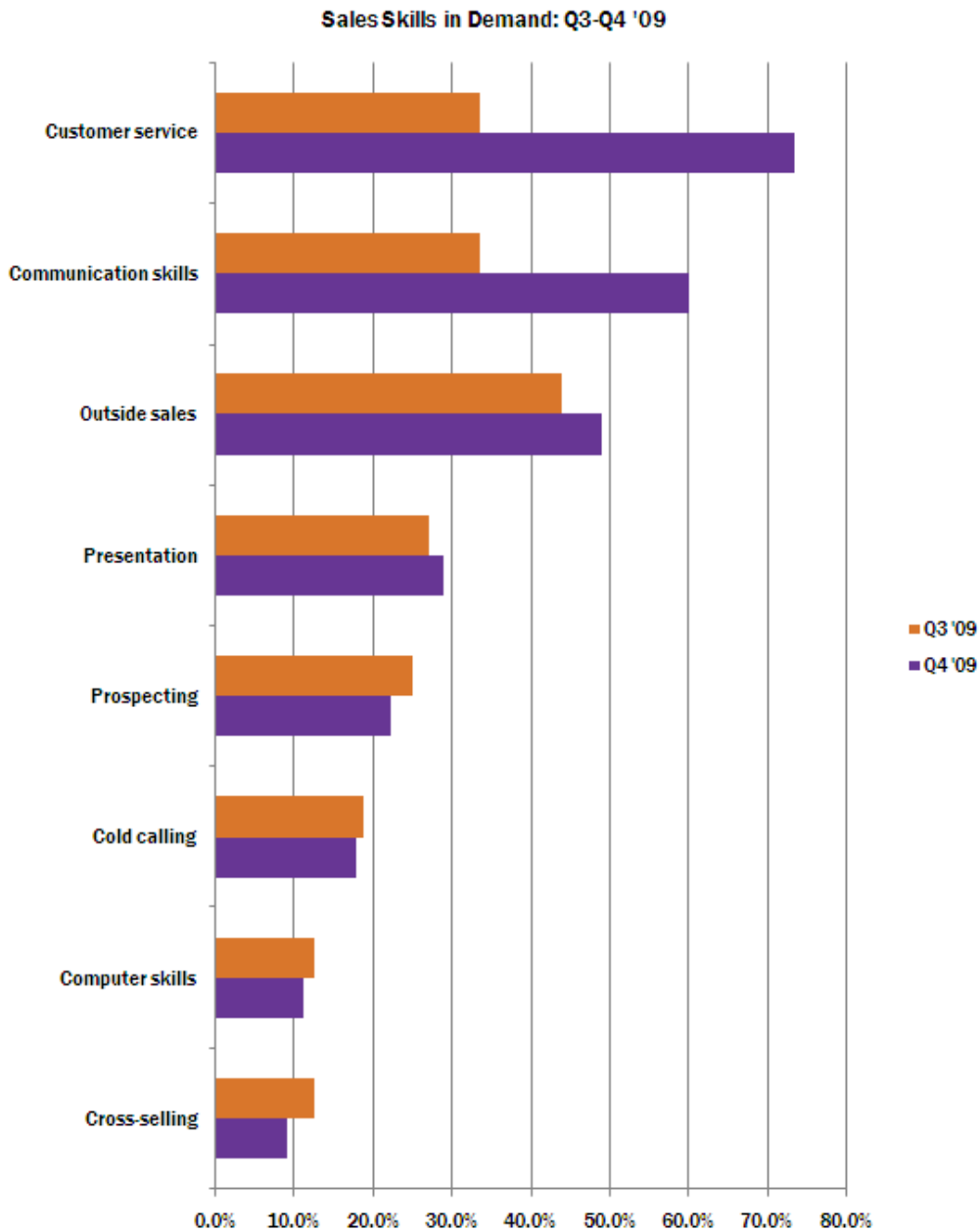
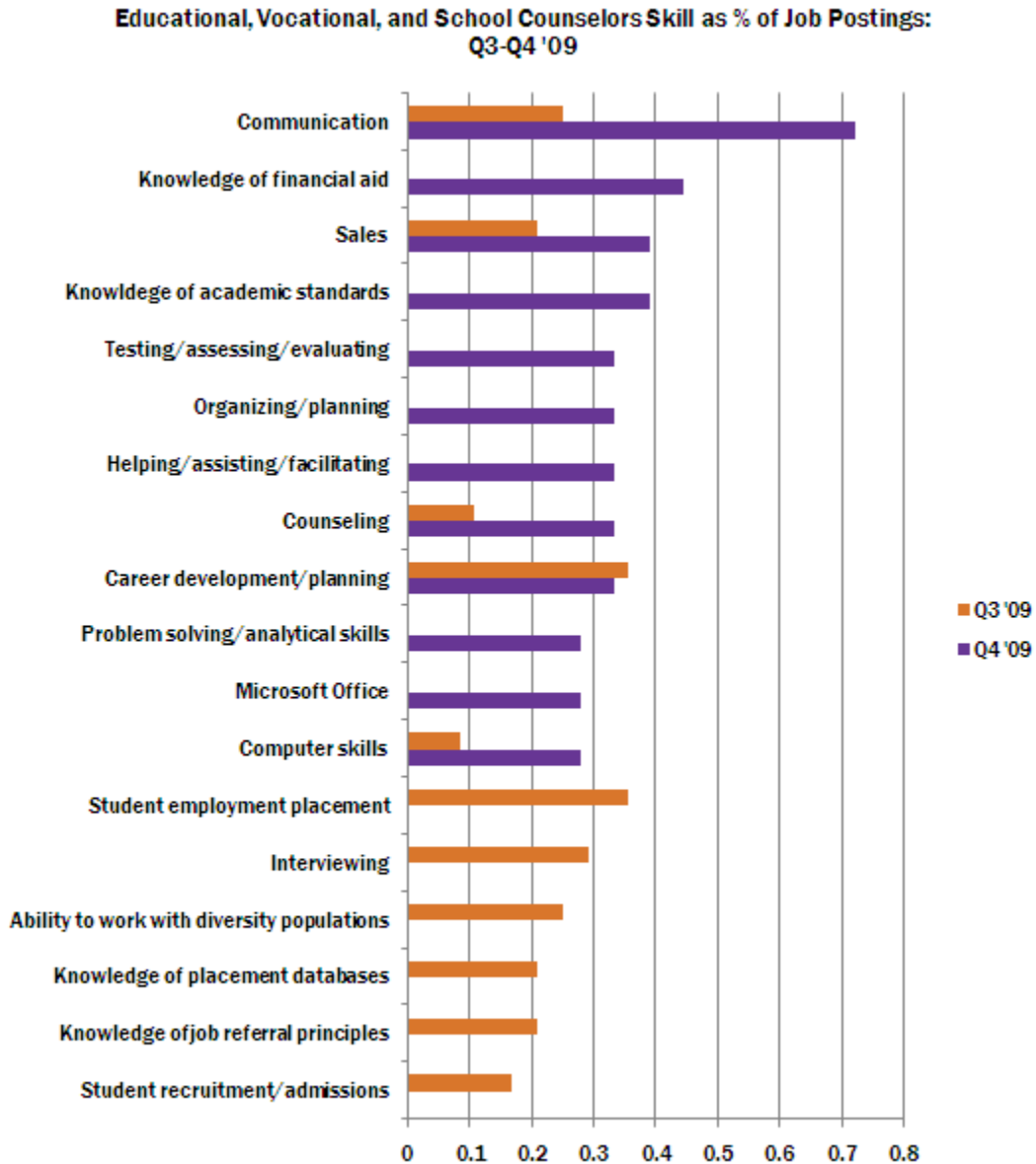


Figure 8: Skills in Demand – Sales and Related Occupations: Q3-Q4 '09
 Source: Monster Worldwide

The chart below indicates specific skills in demand within the **Educational, Vocational, and School Counselors** occupation.

Communication skills were present in a vast majority of counselor job postings in quarter four.

Note that there were limited job postings to evaluate, due to typical low volumes and seasonality that occurs through the school year. Particular skills were limited to the listed jobs during each respective quarter.



**Figure 9: Skills in Demand – Educational, Vocational, and School Counselors:
 Q3-Q4 '09**

Source: Monster Worldwide

TALENT DEMAND EDUCATION REQUIREMENTS

Similar to what was seen in the third quarter, employers are most interested in candidates possessing a Bachelor's degree (42%), followed by a High School degree or equivalent (30%).

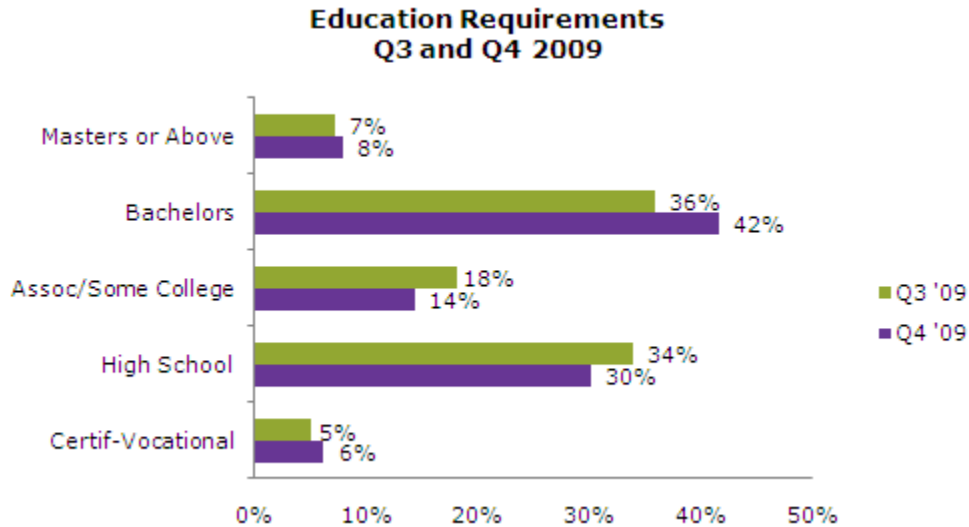


Figure 10: San Bernardino Education Requirements: Q3 and Q4
 Source: Monster Worldwide

As seen in the chart below, the changes in education requirements from quarter three to quarter four balanced out most of the changes from quarter two to quarter three. The only exception was the continued expansion (albeit a slight 3% in quarter four) of job postings requiring at least a Master's Degree.

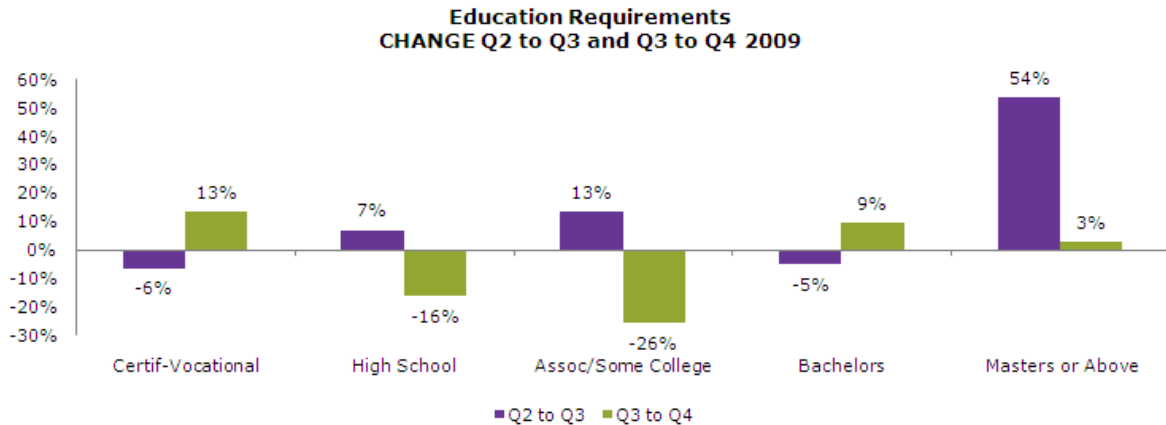


Figure 11: San Bernardino Education Requirements CHANGE Q2/Q3 and Q3/Q4
 Source: Monster Worldwide

TALENT DEMAND EXPERIENCE REQUIREMENTS

San Bernardino employers are seeking primarily entry and junior level candidates, however at a declining rate. 69% of job postings, down from 76% in quarter three and 79% in quarter two, desire a candidate with five years or less of work experience.

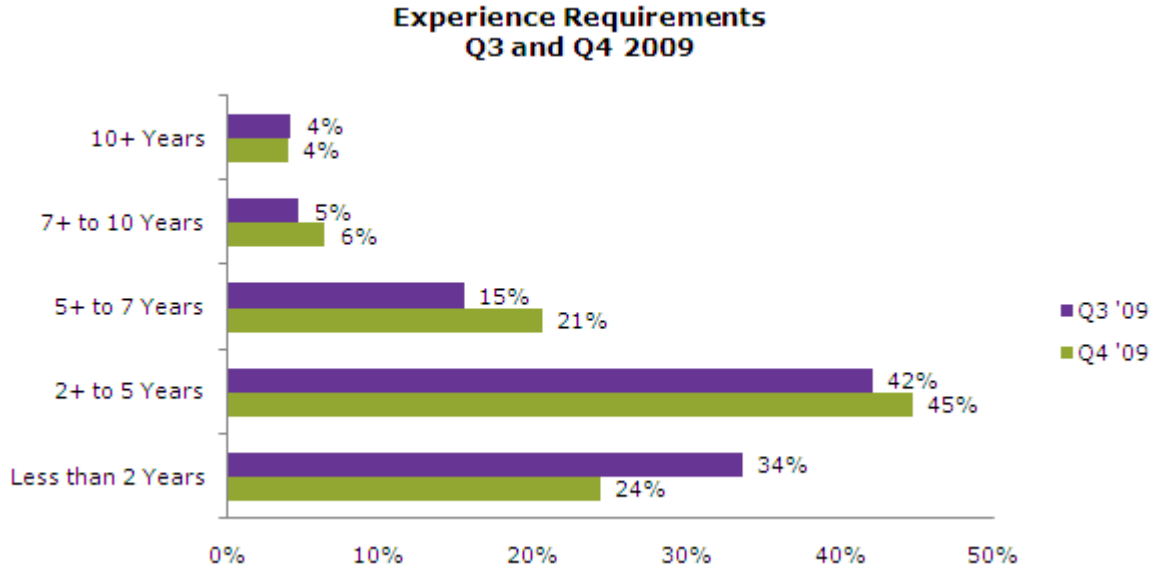


Figure 12: San Bernardino Experience Requirements: Q3 and Q4
 Source: Monster Worldwide

The chart below shows the trend mentioned above: a continued decrease in the share of job postings requiring less than five years of experience. Offsetting the decrease, there has been a noticeable increase in postings requiring five to ten years of experience.

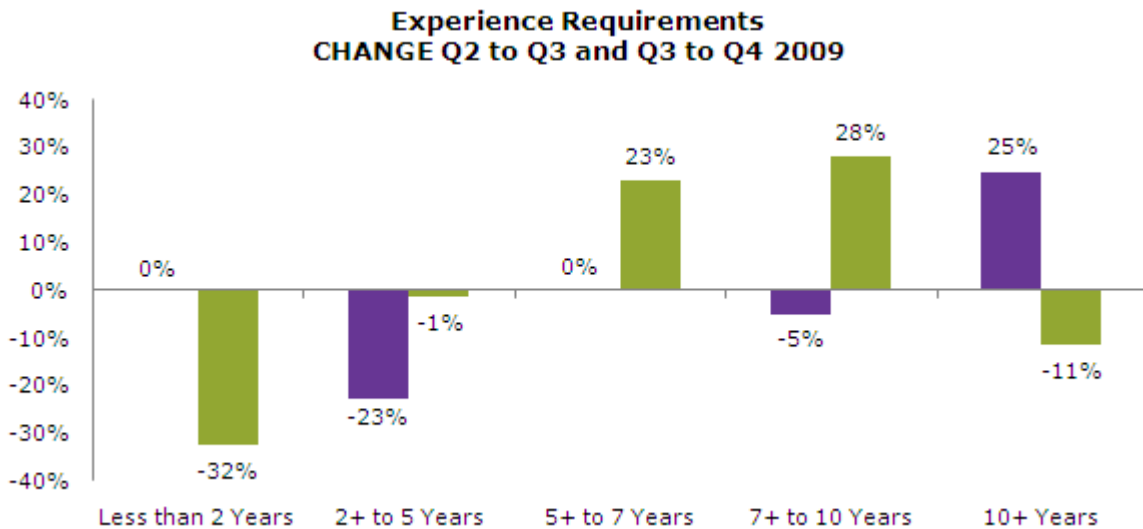


Figure 13: San Bernardino Education Requirements – CHANGE Q2/Q3 and Q3/Q4
 Source: Monster Worldwide

San Bernardino Talent Supply Analysis

TALENT SUPPLY

The number of new San Bernardino resumes on Monster has shown volatility quarter by quarter, fluctuating annually due to seasonal trends. In quarter four, resumes fell 23%, reflecting a typical holiday seasonal slowdown, similar to the 27% drop experienced in quarter four 2008.

Expect resumes to rebound in quarter one 2010 as job seekers dedicate themselves to job searching in a new year.

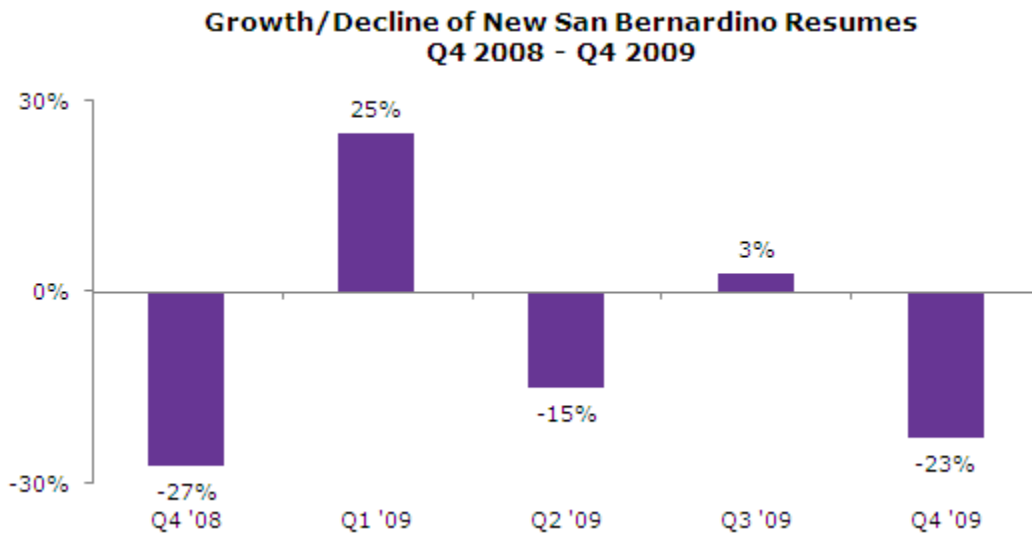


Figure 14: Growth/Decline of New San Bernardino Resume Postings
Source: Monster Worldwide

TALENT SUPPLY BY INDUSTRY SECTOR

The table on the next page summarizes the top twenty industries and their percentage share of new job seeker resumes posted for the third and fourth quarter of 2009, as well as the percentage and net change from the third to fourth quarter.

The two industries with the **greatest talent availability** were the same as quarter three:

1. Professional, Scientific, and Technical Services (16%)
2. Manufacturing (12%)

As the new resume supply fell 23% in quarter four, every industry declined yet some dropped more dramatically than others. The industries that **lost** over 1,000 resumes each were:

1. Professional, Scientific, and Technical Services (-1,720)
2. Manufacturing (-1,075)
3. Finance and Insurance (-1,016)

The three industries showing the **least decline** in talent supply were:

1. Management of Companies/Enterprises (-15%); note that this industry declined the most (-8%) last quarter
2. Wholesale Trade (-17%)
3. Information (-21%)

The **greatest decrease** in San Bernardino talent supply quarter-to-quarter were:

1. Educational Services (-36%)
2. Retail Trade (-32%)
3. Administrative and Support and Waste Management/Remediation Services (-32%)

Top 20 Industries: New Resumes	Q3: Jul-Sep '09 %	Q4: Oct-Nov '09 %	Q3-Q4 % Change	Q3-Q4 Net Change
Professional, Scientific, Technical Services	16%	16%	-26%	-1,720
Manufacturing	11%	12%	-22%	-1,075
General Services	8%	8%	-27%	-942
Information	8%	8%	-21%	-664
Accommodation and Food Services	8%	8%	-28%	-922
Finance and Insurance	8%	8%	-30%	-1,016
Health Care and Social Assistance	6%	5%	-31%	-773
Administrative and Support and Waste Management and Remediation Services	5%	5%	-32%	-719
Construction	4%	4%	-28%	-520
Arts, Entertainment, and Recreation	4%	4%	-29%	-499
Retail Trade	4%	4%	-32%	-532
Utilities	3%	3%	-23%	-269
Public Administration	3%	3%	-31%	-398
Educational Services	3%	3%	-36%	-432
Real Estate and Rental and Leasing	2%	2%	-28%	-295
Management of Companies/Enterprises	2%	2%	-15%	-115
Wholesale Trade	1%	2%	-17%	-103
Transportation and Warehousing	2%	1%	-30%	-203
Mining, Quarrying, and Oil/Gas Extraction	1%	1%	-28%	-130
Agriculture, Forestry, Fishing and Hunting	1%	1%	-31%	-91

Figure 15: Top 20 Industries in Demand and Their Change

Source: Monster Worldwide

*Note: Monster Job Seekers may target up to 10 Monster Industries per Resume
 (See Appendix A for Monster Industry to NAICS crosswalk)*

TALENT SUPPLY BY OCCUPATIONAL CATEGORIES

The table below summarizes the top 20 occupations by talent supply for the third and fourth quarter of 2009.

These top 20 occupations represent 72% of all talent supply.

Top 20 Occupations: Talent Supply Growth	Q3: July-Sept '09 %	Q4: Oct-Dec '09 %
Information and Record Clerks	11%	10%
General Management	5%	6%
Operations Specialties Managers	5%	5%
Computer Specialists	4%	5%
Secretaries and Administrative Assistants	6%	5%
Top Executives	4%	4%
Financial Specialists	4%	4%
General Office and Administrative Support Workers	5%	4%
Material Recording, Scheduling, Dispatching, and Distributing Workers	3%	4%
Business Operations Specialists	4%	3%
Advertising, Marketing, Promotions, Public Relations, and Sales Managers	3%	3%
Financial Clerks	3%	3%
Supervisors, Office and Administrative Support Workers	2%	2%
Health Technologists and Technicians	2%	2%
Retail Sales Workers	3%	2%
General Healthcare Support	2%	2%
General Sales and Related Workers	2%	2%
Engineers	2%	2%
Art and Design Workers	1%	2%
Supervisors, Production Workers	2%	1%

Figure 16: Top 20 Occupations in Demand

Source: Monster Worldwide

As resumes fell 23% in quarter four, nearly every occupation declined during this time period.

The occupations that saw a **significant drop** (over 150 new resumes) in talent demand were:

1. Information and Record Clerks (-495)
2. Secretaries and Administrative Assistants (-275)
3. General Office and Administrative Support Workers (-197)
4. Operations Specialties Managers (-189)
5. General Management (-171)

The greatest **increases** in talent supply in San Bernardino County were in the following occupations (for occupations representing more than 1% of total volume):

1. Supervisors, Food Preparation, and Serving Workers (+3%)
2. General Installation, Maintenance, and Repair (+2%)

The greatest **decreases** in talent supply in San Bernardino County were in the following occupations (for any occupation representing more than 1% of total volume):

1. Vehicle and Mobile Equipment Mechanics, Installers, and Repairers (-49%)
2. General Protective Service Workers (-43%)
3. Supervisors of Installation, Maintenance, and Repair Workers (-42%)
4. Sales Representatives, Services (-41%)
5. Health Diagnosing and Treating Practitioners (-40%)
6. Media and Communication Workers (-40%)
7. Drafters, Engineering, and Mapping Technicians (-39%)
8. Retail Sales Workers (-39%)
9. Social Scientists and Related Workers (-39%)
10. Secretaries and Administrative Assistants (-38%)
11. Information and Record Clerks (-36%)
12. Advertising, Marketing, Promotions, Public Relations, and Sales Managers (-36%)
13. General Office and Administrative Support Workers (-35%)
14. Motor Vehicle Operators (-33%)
15. Counselors, Social Workers, and Community and Social Service Specialists (-32%)
16. Supervisors, Production Workers (-31%)
17. Supervisors, Office and Administrative Support Workers (-29%)
18. Business Operations Specialists (-29%)
19. Construction Trades Workers (-28%)
20. Operations Specialties Managers (-27%)

The table below summarizes occupational growth and demand over the past two quarters, for those with 1% share or more. Occupations are in alphabetical order.

Occupation Title	Q3 % Total	Q4 % Total	Q3-Q4 Change	Q3-Q4 Net Change
Advertising, Marketing, Promotions, PR, and Sales Managers	3%	3%	-36%	-149
Art and Design Workers	1%	2%	-14%	-22
Assemblers and Fabricators	0%	1%	-9%	-5
Business Operations Specialists	4%	3%	-29%	-130
Computer Specialists	4%	5%	-15%	-82
Construction Trades Workers	1%	1%	-28%	-31
Counselors, Social Workers, and Community Social Service Specialists	1%	1%	-32%	-58
Drafters, Engineering, and Mapping Technicians	1%	1%	-39%	-60
Electrical and Electronic Equipment Mechanics, Installers, and Repairers	1%	1%	-25%	-39
Engineers	2%	2%	-19%	-39
Financial Clerks	3%	3%	-27%	-94
Financial Specialists	4%	4%	-26%	-135
General Healthcare Support	2%	2%	-18%	-43
General Installation, Maintenance, and Repair	1%	1%	2%	2
General Management	5%	6%	-25%	-171
General Office and Administrative Support Workers	5%	4%	-35%	-197
General Production	1%	1%	-9%	-8
General Protective Service Workers	1%	1%	-43%	-36
General Sales and Related Workers	2%	2%	-11%	-22
Health Diagnosing and Treating Practitioners	1%	1%	-40%	-46
Health Technologists and Technicians	2%	2%	-22%	-57
Information and Record Clerks	11%	10%	-36%	-495
Material Moving Workers	1%	1%	-12%	-13
Material Recording, Scheduling, Dispatching, and Distributing Workers	3%	4%	-10%	-40
Media and Communication Workers	1%	1%	-40%	-46
Metal Workers and Plastic Workers	1%	1%	-3%	-2
Motor Vehicle Operators	1%	1%	-33%	-59
Operations Specialties Managers	5%	5%	-27%	-189
Retail Sales Workers	3%	2%	-39%	-123
Sales and Related	1%	1%	-25%	-35
Sales Representatives, Services	1%	1%	-41%	-61
Secretaries and Administrative Assistants	6%	5%	-38%	-275
Social Scientists and Related Workers	1%	1%	-39%	-51
Supervisors of Installation, Maintenance, and Repair Workers	1%	1%	-42%	-49
Supervisors, Food Preparation and Serving Workers	1%	1%	3%	2
Supervisors, Office and Administrative Support Workers	2%	2%	-29%	-88
Supervisors, Production Workers	2%	1%	-31%	-58
Supervisors, Sales Workers	1%	1%	-24%	-27
Top Executives	4%	4%	-24%	-120
Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	1%	1%	-49%	-52

Figure 17: San Bernardino Occupation Growth and Demand

Source: Monster Worldwide

TALENT SUPPLY SKILLS AVAILABILITY

Akin to the job posting skills analysis, we conducted a content analysis of job seekers' resumes in the San Bernardino area to determine the top skills available.

Hard skills, typically teachable, on-the-job training attributes, remained notably consistent from quarter three to quarter four.

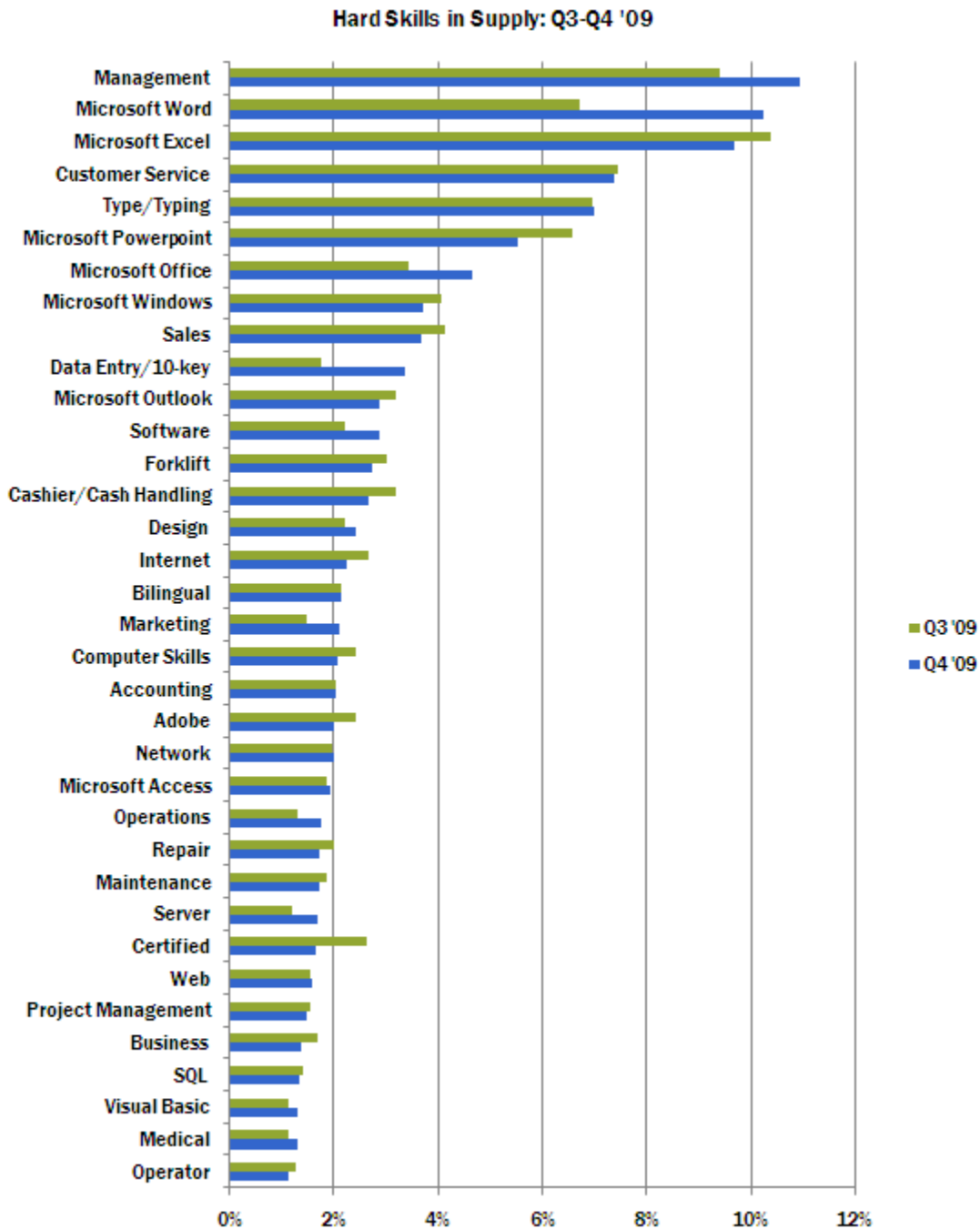


Figure 18: Hard Skills in Supply Q3-Q4 '09
 Source: Monster Worldwide

Similar to hard skills, there were minor shifts in **soft skills** available from the talent supply from quarter three to quarter four, as shown in the chart below.

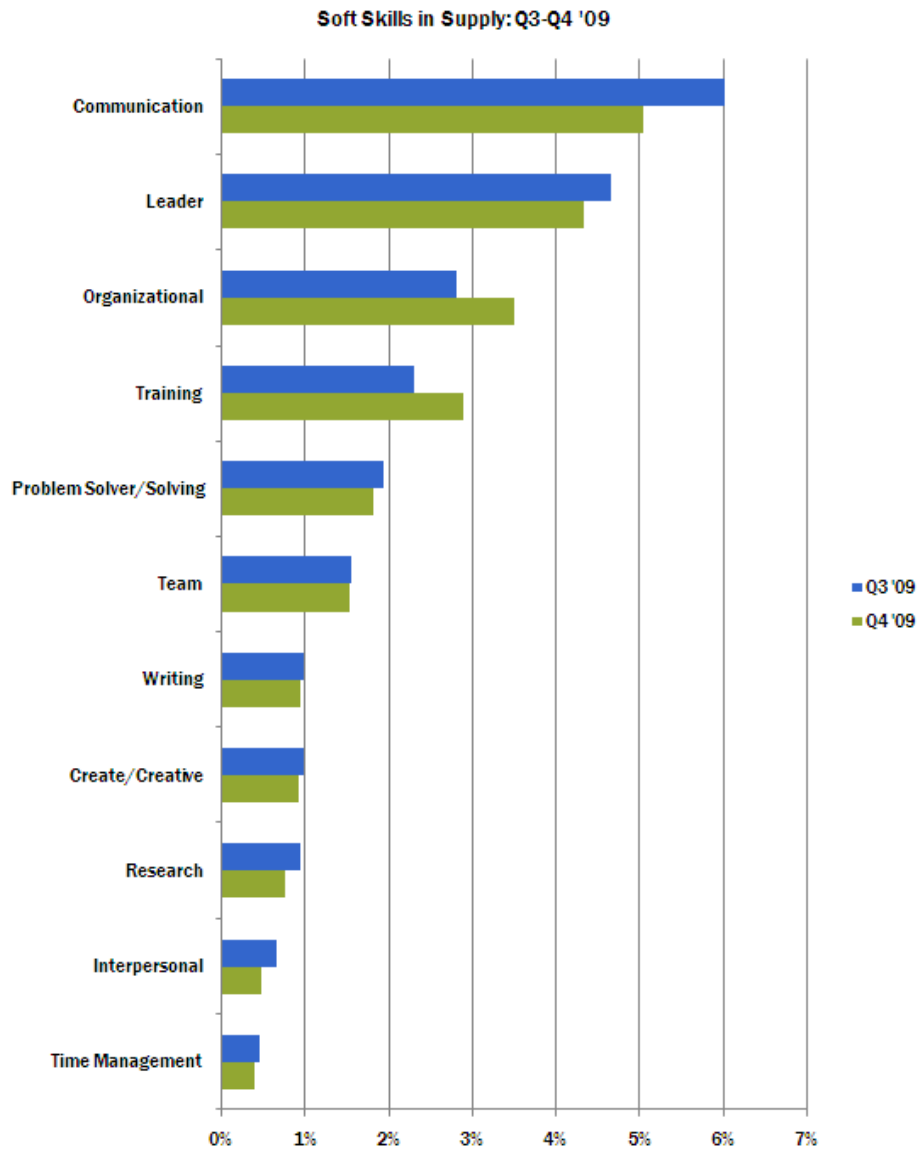


Figure 19: Soft Skills in Supply Q3-Q4 '09

Source: Monster Worldwide

TALENT AVAILABILITY EDUCATION

The majority of San Bernardino’s job seekers possess an Associate’s degree and/or some college coursework (35%).

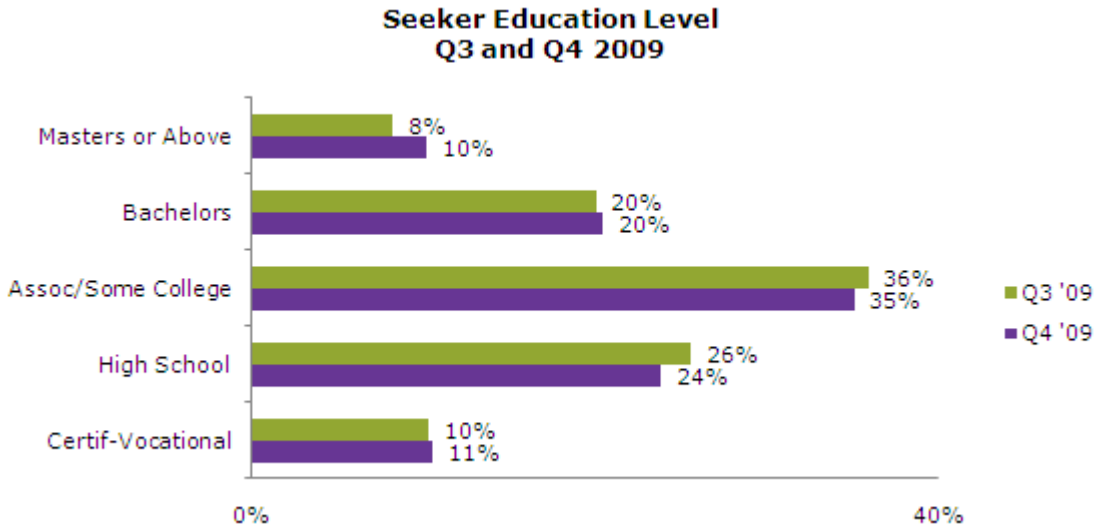


Figure 20: San Bernardino Seeker Education Level: Q3 and Q4
 Source: Monster Worldwide

Falling in conjunction with the 23% drop in total San Bernardino resumes on Monster, all education categories fell from quarter three to quarter four. The one category that was minimally impacted during the quarter was Master’s or Above, following its 6% expansion in quarter three.

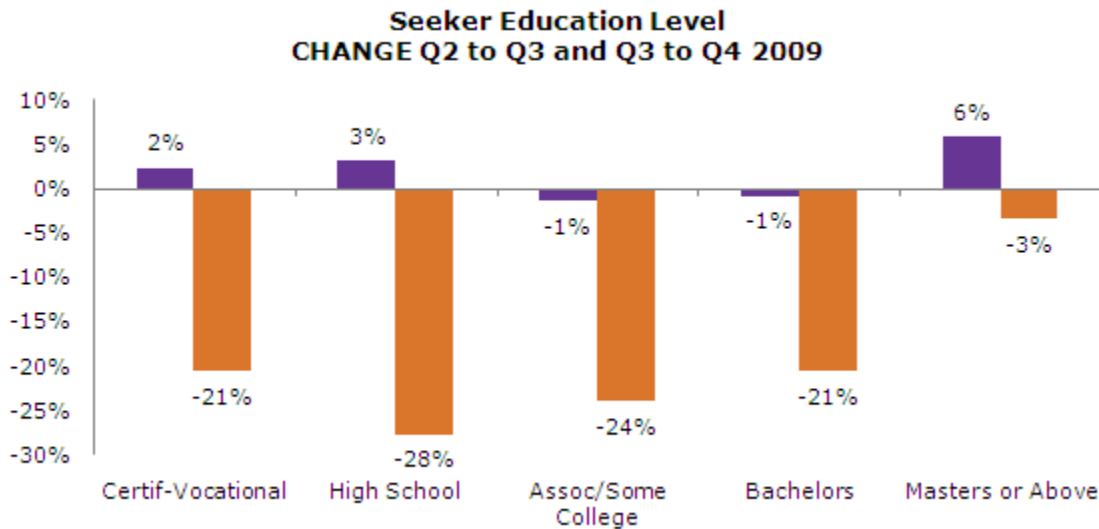


Figure 21: San Bernardino Seeker Education Level – CHANGE Q2 to Q3; Q3 to Q4
 Source: Monster Worldwide

As shown in the chart below, there are several differences between the educational qualifications employers seek and talent level of those available. This disparity expanded in quarter four.

Employers are looking for candidates with a Bachelor's degree in excess of the talent available (22% difference, compared to 16% in quarter three), as well as a higher percentage of High School graduates (4% difference, compared to 8% in quarter three).

On the other hand, employers will find a greater population of candidates with an Associate's degree/Some College experience (21% difference between postings and resumes, compared to 18% in quarter three) and Certificate/Vocational experience (5% difference in both quarter three and four).

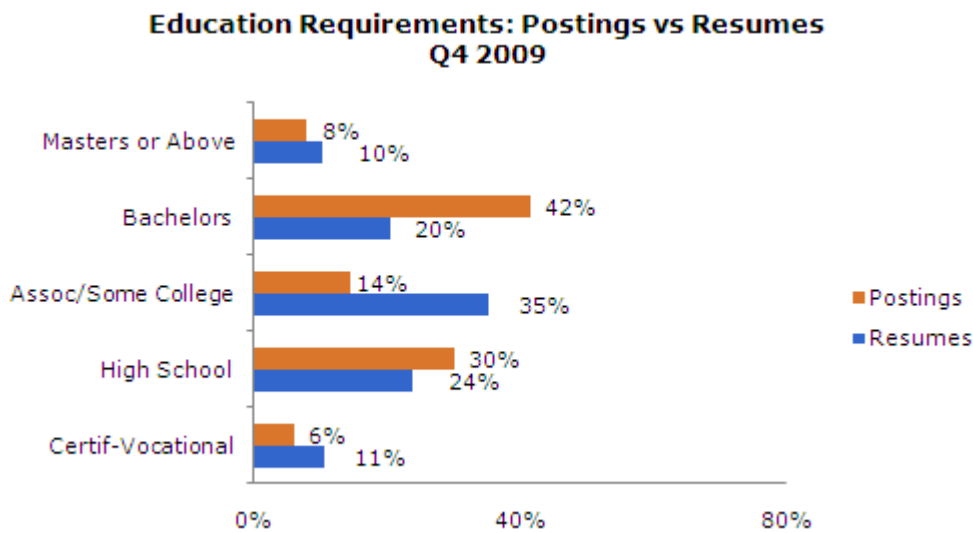


Figure 22: San Bernardino Seeker Education Level – Q4 Postings versus Resumes
Source: Monster Worldwide

Occupation Supply & Demand Analysis

The Labor Performance Matrix below and on the next page compares San Bernardino's job postings versus resume performance in targeted occupations.

The size of the circles represents the supply, based on the ratio of resumes per job from October 2009 through December 2009. A large circle indicates a large pool of talent in comparison to the demand, and a smaller circle represents areas where the demand may outweigh the supply.

How to Read the Matrix:

Talent Surplus:

- Not enough jobs to match supply
- Plan for increased volume of candidates
- Focus on skills migration

Growth Areas (Incubator Opportunities)

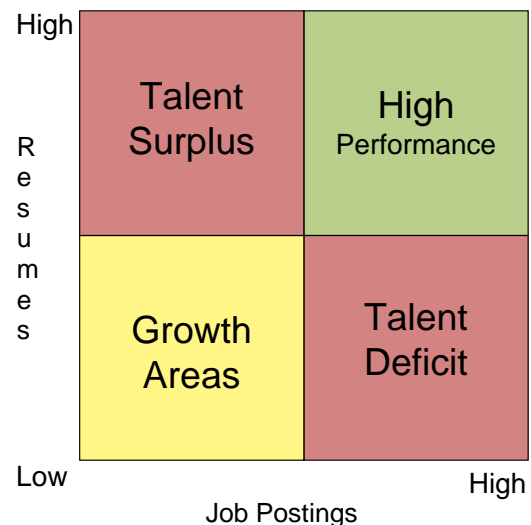
- High growth potential
- Select key strategic industries to target

High Performance

- High growth in jobs and talent
- Focus on keeping talent

Talent Deficit

- Not enough talent to meet demand
- At risk for competition



As seen on the next page in the San Bernardino County analysis, there were several key changes in the talent supply and demand from quarter three to quarter four:

- *Talent Surplus:* The Management occupation shifted from straddling the High Performance/Talent Deficit into the Talent Surplus quadrant, indicating a drop in job postings for Management candidates. Training venues such as community education and corporate development could help to develop new skills for this surplus of candidates as well as resupply the sector with Management job postings.
- *High Performance:* Office and Administrative Support remained solidly in the High Performance Zone, albeit with a slight drop in job postings, showing a solid supply of both supply and demand for these occupations.
- *Talent Deficit:* The Sales and Related sector stayed in the same location, highlighting a continued shortage of candidates and the need for recruitment development. The Arts/Design/Entertainment/Sports/Media barely broke out of the incubator quadrant, revealing an expansion of talent demand (and shortage of talent supply).
- *Growth Areas:* A majority of occupations continue to remain in the bottom left quadrant. The most noticeable overall shift was the move by the Healthcare Practitioners/Technical sector from the Talent Deficit to the Growth Area, indicating a significant drop in job postings. Finally, Business/Financial Operations and Computer/Mathematical maintain their positions close to a talent deficit and as key areas to watch.

The matrix below summarizes quarter four occupational supply and demand.

San Bernardino - Supply and Demand
 Q4 2009

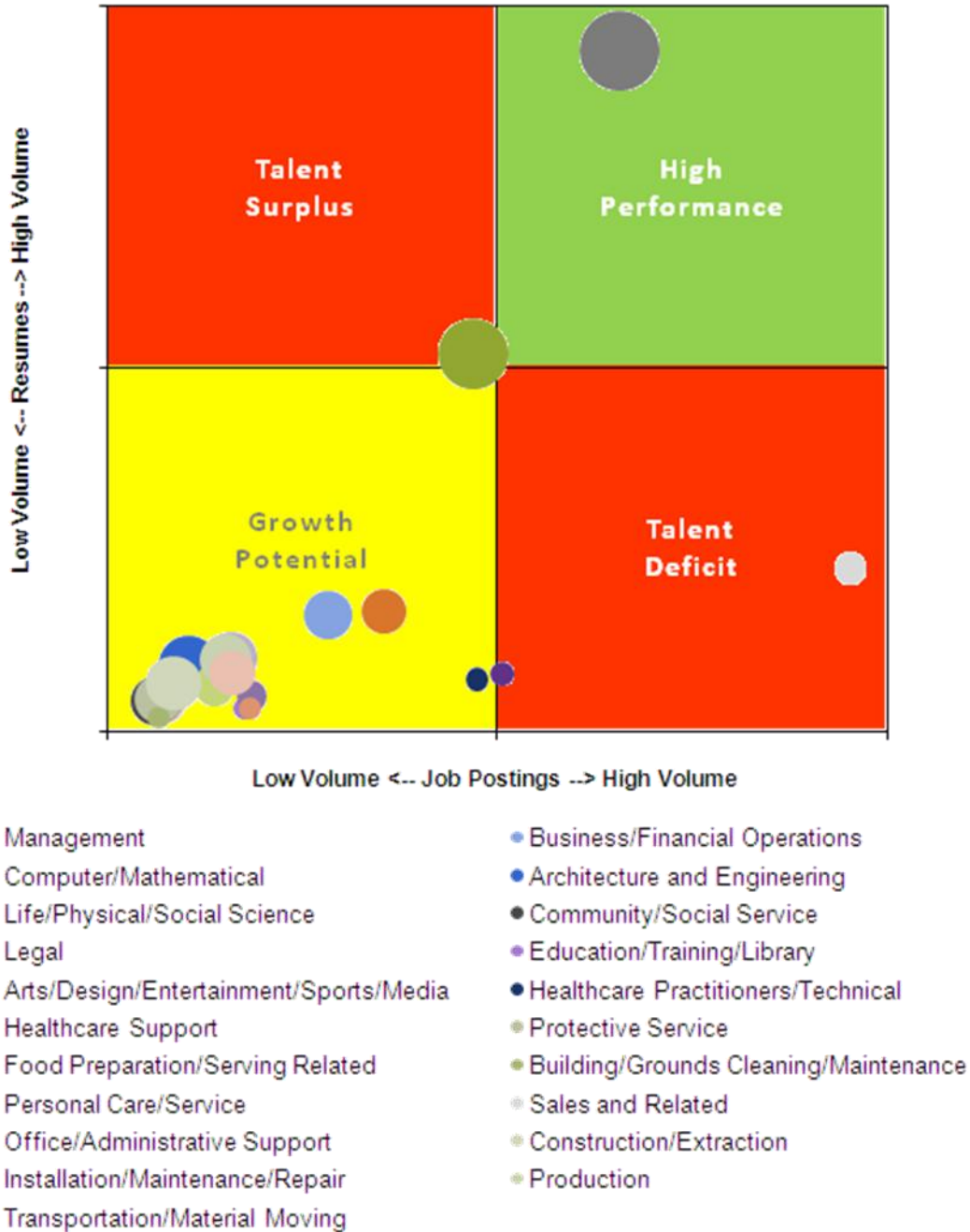


Figure 23: San Bernardino Labor Performance Matrix
 Source: Monster Worldwide

Actions to Consider

In the third quarter, "Actions to Consider" addressed the following issues: healthcare development, entry level opportunities, customer service and communication skills, management training, and the construction industry.

Looking at San Bernardino's fourth quarter talent supply and demand, a new set of issues and opportunities arise. While it is challenging to address each industry, occupation, and opportunity, the following recommendations should be added to the list of the County's priority actions.

- **Watch industries and occupations with strong movement, either positive or negative.** Ensure the County has established metrics and a process to monitor and develop the blossoming, as well as wilting, sectors. As the County and country emerge from troubled times, it is critical to ensure talent supply meets talent demand across industries.

There were several critical sectors to note this quarter:

- Healthcare saw a drop in both talent demand and supply. As the industry with the greatest number of online job postings, San Bernardino County needs to stay focused on and concerned with maintaining this industry that is vital to the local economy.
 - Finance and Insurance reported a jump in talent demand while talent supply constricted. Clearly, these opposing moves raise concern and require attention to both recruiter and workforce development.
 - Sales postings rose this quarter, causing a continued and heightened shortage of candidates in this "Talent Deficit" industry.
 - Utilities and Accommodation and Food Services were among the fastest growing industries (in terms of job postings) two quarters in a row. Work with local companies to ensure required talent supply is trained and available.
- **Nurture opportunities for those with 5-10 years of work experience.** Job postings for this group surged 24% in quarter four, even when total job posting volume was down 10%. Though entry level opportunities are still a majority, this second tier of roles is critical to continued workforce development and management succession.
 - **Develop a sound college presence and network.** With a high percentage of recruiters seeking Bachelor's degree candidates (42%) and a majority of San Bernardino seekers having at most an Associate's degree (35%), the County should ensure local community colleges are well marketed, tuition assistance programs are in place, and residents understand the value of a college degree.
 - **Focus on language training.** Bilingual was a key skill listed in overall, Healthcare, and Customer service representative occupations. It was listed as a skill in only 2% of resumes and over 16% of job postings. With a multi-cultural society, San Bernardino County should offer regular and affordable English as a second language and Spanish classes to ensure its population is equipped to staff local opportunities and work together.

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Appendix A: Monster Industry to NAICS Crosswalk

NAICS code	NAICS	Monster Industry
11	Agriculture, Forestry, Fishing and Hunting	Agriculture/Forestry/Fishing
21	Mining, Quarrying, and Oil and Gas Extraction	Chemicals/Petro-Chemicals
21	Mining, Quarrying, and Oil and Gas Extraction	Metals and Minerals
22	Utilities	Energy and Utilities
23	Construction	Construction - Industrial Facilities and Infrastructure
23	Construction	Construction - Residential & Commercial/Office
31	Manufacturing	Aerospace and Defense
31	Manufacturing	Automotive and Parts Mfg
31	Manufacturing	Electronics, Components, Semiconductor Mfg
31	Manufacturing	Manufacturing - Other
31	Manufacturing	Marine Mfg & Services
31	Manufacturing	Medical Devices and Supplies
31	Manufacturing	Textile and Clothing Manufacturing
42	Wholesale Trade	Wholesale Trade/Import-Export
44	Retail Trade	Retail
48	Transportation and Warehousing	Transport and Storage - Materials
51	Information	Advertising and PR Services
51	Information	Broadcasting, Music, and Film
51	Information	Internet Services
51	Information	Printing and Publishing
51	Information	Telecommunications Services
52	Finance and Insurance	Banking
52	Finance and Insurance	Financial Services
52	Finance and Insurance	Insurance
53	Real Estate and Rental and Leasing	Real Estate and Property Management
53	Real Estate and Rental and Leasing	Rental Services
54	Professional, Scientific, and Technical Services	Accounting and Auditing Services
54	Professional, Scientific, and Technical Services	Architectural and Design Services
54	Professional, Scientific, and Technical Services	Biotechnology/Pharmaceuticals
54	Professional, Scientific, and Technical Services	Business Services - Other
54	Professional, Scientific, and Technical Services	Computer Hardware
54	Professional, Scientific, and Technical Services	Computer Software
54	Professional, Scientific, and Technical Services	Computer/IT Services
54	Professional, Scientific, and Technical Services	Engineering Services
54	Professional, Scientific, and Technical Services	Legal Services
55	Management of Companies and Enterprises Administrative and Support and Waste	Management Consulting Services
56	Management and Remediation Services Administrative and Support and Waste	Staffing/Employment Agencies
56	Management and Remediation Services Administrative and Support and Waste	Travel, Transportation and Tourism
56	Management and Remediation Services	Waste Management
61	Educational Services	Education
62	Health Care and Social Assistance	Healthcare Services
62	Health Care and Social Assistance	Security and Surveillance
71	Arts, Entertainment, and Recreation	Entertainment Venues and Theaters
71	Arts, Entertainment, and Recreation	Performing and Fine Arts
71	Arts, Entertainment, and Recreation	Sports and Physical Recreation
72	Accommodation and Food Services	Food and Beverage Production
72	Accommodation and Food Services	Hotels and Lodging
72	Accommodation and Food Services	Restaurant/Food Services
81	Other Services	All
81	Other Services	Automotive Sales and Repair Services
81	Other Services	Nonprofit Charitable Organizations
81	Other Services	Other/Not Classified
81	Other Services	Personal and Household Services
81	Other Services	Personal Care and Cosmetics
92	Public Administration	Government and Military