

State of Ohio Workforce

Third Quarter
2007



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Quarterly Report on the State of Ohio's Workforce

Reference Period: Third Quarter 2007

(Per Ohio Revised Code 6301.10)

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Ohio Department of Job and Family Services
Office of Workforce Development
Bureau of Labor Market Information
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Analyst Summary

Ohio's unemployment rate held steady at 5.8 percent in the third quarter of 2007. The unemployment rate for the third quarter averaged 0.2 percentage point higher than a year ago. Employment measured by the survey of business establishments rose 3,400 on a seasonally adjusted basis over the quarter to 5,437,400 in the third quarter of 2007. The housing market continued to decline with the number of permits for new residential construction down more than one-fifth both nationally and in Ohio from the third quarter of last year. The Ohio composite index of leading indicators increased 0.3 percentage point, the same as nationally, in the third quarter, suggesting some employment growth through the holiday season.

The U.S. unemployment rate for the third quarter averaged 4.7 percent, up 0.2 percentage point from the second quarter and the same as a year ago. Ohio's unemployment rate averaged 1.2 percentage points higher than the U.S. rate during the past six months. The average number of Ohioans unemployed per month decreased slightly over the quarter from 348,000 to 345,000 in the third quarter of 2007. The number of Ohioans unemployed was also up somewhat from 334,000 in the third quarter of 2006 as was the unemployment rate, up from 5.6 percent a year ago.

The number of initial claims for unemployment insurance filed in Ohio were generally elevated from 2001 through 2007 when compared to 2000 for any given month. Initial claims filed so far in 2007 have been somewhat lower than a year ago. The average duration of unemployment compensation stood at 15.1 and 15.2 weeks for the third quarter for Ohio and the U.S., respectively, both down slightly from a year ago.

Ohio's nonagricultural wage and salary employment increased 3,400 in the third quarter to 5,437,400, on a seasonally adjusted basis. Employment in service-providing industries was 6,300 higher, while goods-producing jobs declined 2,900. Total nonfarm wage and salary jobs stayed the same as a year ago. Education and health services accounted for most of the gains posted over the last year, followed by professional and business services.

The composite index of Ohio's leading indicators increased 0.3 percentage point to 96.7 in the third quarter, suggesting some employment growth through the holiday season. In addition to the continued drop in the housing sector, U.S. domestic auto production ratcheted lower, down ten percent from the third quarter of 2006.

Unemployment Rates and Related Data

Employment Situation: Ohio and U.S. (Seasonally Adjusted)

Ohio's unemployment rate for the third quarter of 2007 was 5.8 percent, unchanged from second quarter 2007 and up from 5.6 a year ago. The U.S. unemployment rate for the third quarter was 4.7 percent, up from the second quarter 2007 rate of 4.5 percent and unchanged from a year ago. The average number of Ohioans unemployed per month has decreased over the quarter from 348,000 to 345,000.

Employment Situation Indicators for Ohio and U.S.

Seasonally Adjusted

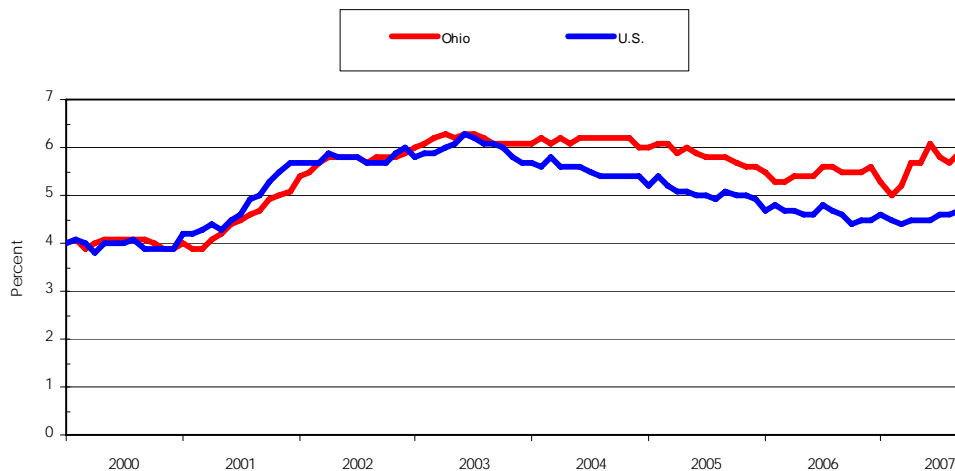
Civilian Labor Force
Employment
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Unemployment Rate

Civilian Labor Force
Employment
Unemployment
Unemployment Rate

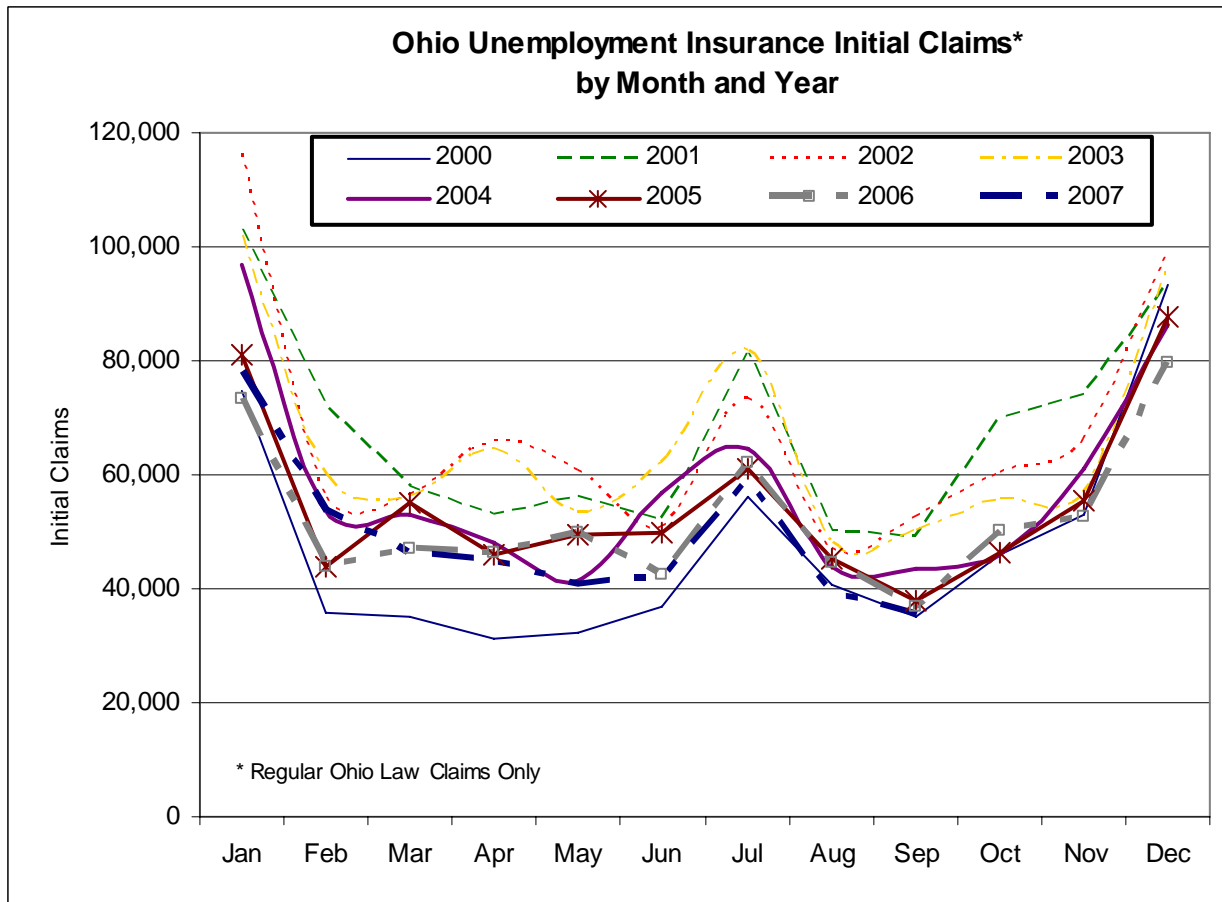
Quarterly Data (in thousands)			Change (in thousands)		Percent Change	
3rd Qtr. 2007	2nd Qtr. 2007	3rd Qtr. 2006	From Last Quarter	From Last Year	From Last Quarter	From Last Year
Ohio						
5,973	5,991	5,948	-18	25	-0.3%	0.4%
5,628	5,643	5,615	-15	14	-0.3%	0.2%
345	348	334	-3	12	-0.8%	3.5%
5.8%	5.8%	5.6%	0.0%	0.2%		
U.S.						
153,195	152,807	151,703	388	1,492	0.3%	1.0%
146,054	145,956	144,618	97	1,436	0.1%	1.0%
7,142	6,851	7,085	291	56	4.2%	0.8%
4.7%	4.5%	4.7%	0.2%	0.0%		

- Ohio and U.S. unemployment rates closely mirrored each other through mid-2003.
- During the latter half of 2003, the rates began to diverge as Ohio's unemployment rate remained high while the U.S. unemployment rate steadily declined.
- During the last six months, Ohio's unemployment rate averaged 1.2 percentage points higher than the U.S. rate.

Ohio and U.S. Seasonally Adjusted Unemployment Rates



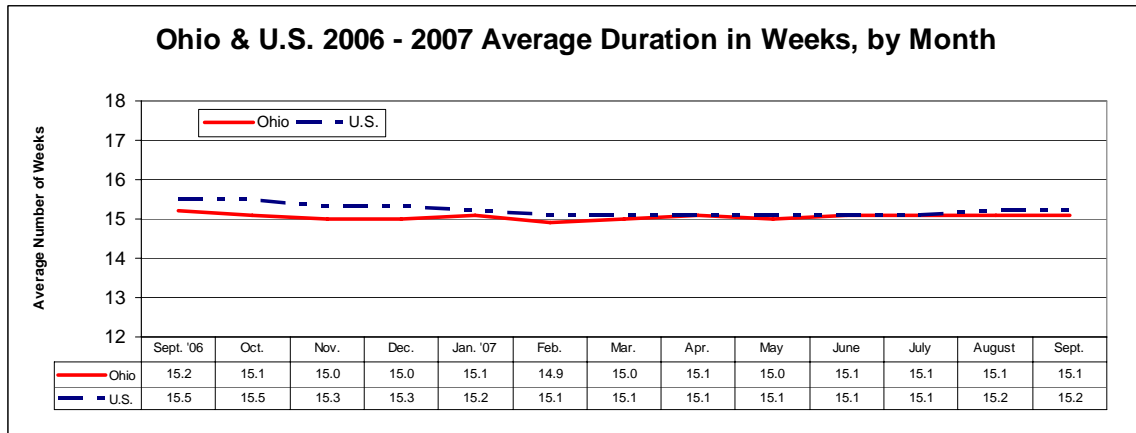
Ohio Monthly Unemployment Insurance Initial Claims



- Monthly initial claims for unemployment insurance follow a typical seasonal pattern every year, with major increases in claims activity occurring in January, July and December.
- Initial claims were generally elevated from 2001 through 2007 when compared to 2000 for any given month.
- Initial claims in September 2007 were lower than the level recorded in September 2006.

Average Duration of Unemployment: Ohio and U.S.

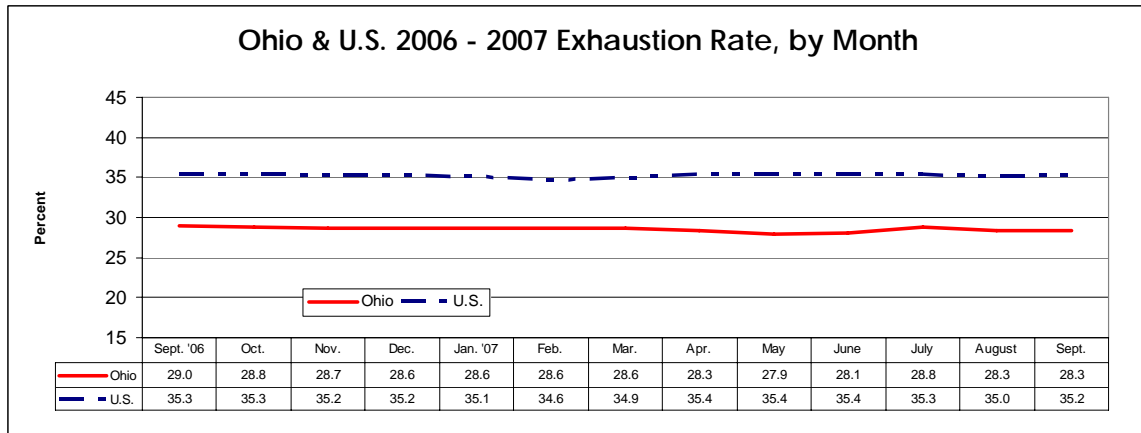
Average duration represents the average number of weeks of compensation received by unemployed claimants during the represented period.



- Ohio's average duration of unemployment closely mirrored the U.S. for the past 12 months.
- The Ohio average duration remained at 15.1 weeks for September 2007 while the U.S. average duration remained at 15.2 for the same period.

Unemployment Insurance Benefit Exhaustions: Ohio and U.S.

The exhaustion rate represents a measure of the proportion of unemployment insurance recipients who ultimately exhaust their benefits.



- Ohio and national exhaustion rates have remained relatively unchanged over the past 12 months.
- Ohio's exhaustion rate stayed consistently lower than that of the U.S.
- Ohio's exhaustion rate remained at 28.3 weeks, while the U.S. rate increased to 35.2 weeks in September 2007.

Employment Data

Ohio Nonagricultural Wage and Salary Employment (Seasonally Adjusted)

Ohio's nonagricultural wage and salary employment rose 3,400 over the quarter, from 5,434,000 in the second quarter of 2007 to 5,437,400 in the third quarter of 2007.

Employment in service-providing industries, at 4,417,600, was 6,300 higher. Government advanced 4,200 due to growth in state and local government. Professional and business services added 3,900 jobs. Also up were educational and health services (+2,100) and other services (+800). Losses in accommodation and food services helped reduce leisure and hospitality employment 1,700. Declines were also noted in trade, transportation, and utilities (-1,600), financial activities (-1,100), and information (-300). Goods-producing industries fell 2,900 to 1,019,800. A decrease of 2,300 in durable goods was partially offset by a gain of 500 in nondurable goods, lowering manufacturing employment 1,800. Construction was down 1,300. Natural resources and mining rose 200.

Over the year, nonfarm wage and salary employment increased 100. Service-providing industries rose 14,600. The largest gain was in educational and health services, up 11,500. Professional and business services advanced 7,500. Also up were other services (+600), trade, transportation, and utilities (+500), and government (+400). Employment was down in financial activities (-3,700), leisure and hospitality (-1,200), and information (-1,000). Goods-producing industries declined 14,500 over the year. Manufacturing was down 14,900 mainly due to losses in durable-goods employment. Natural resources and mining slipped 200. Construction added 600 jobs from last year.

Nonagricultural Wage and Salary Employment Estimates for Ohio^a

Seasonally Adjusted

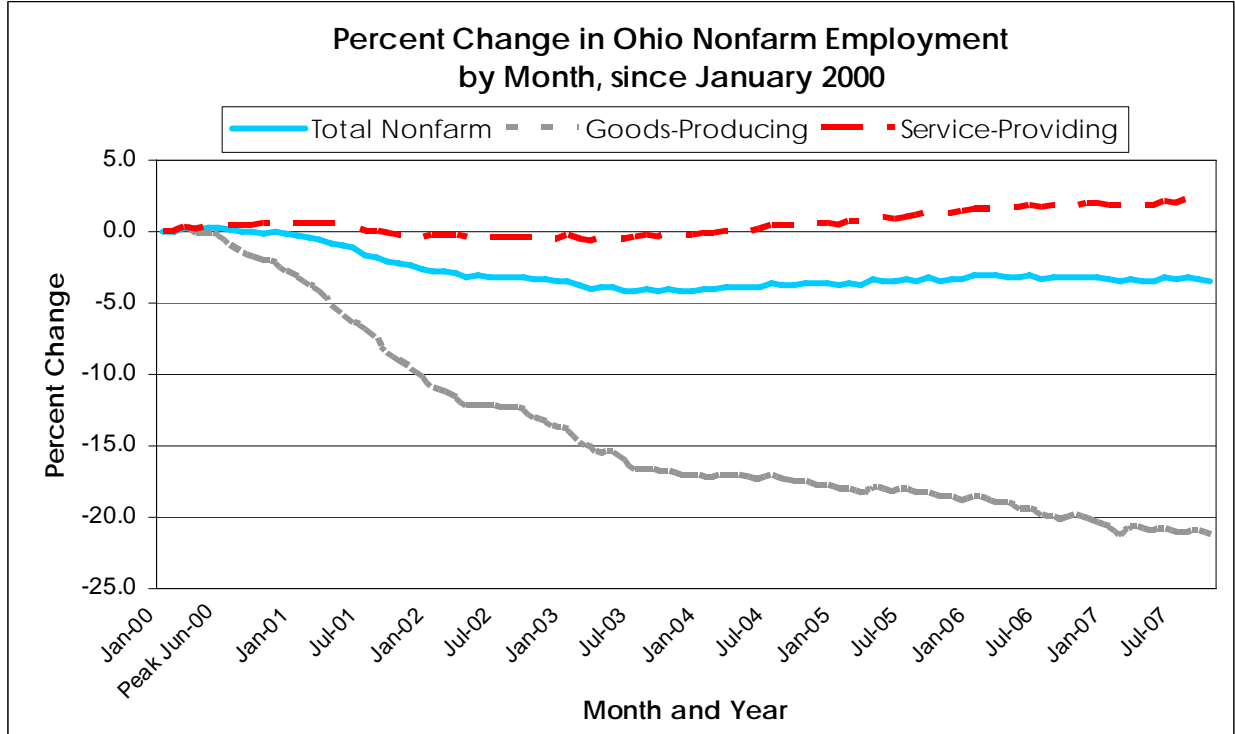
Employer Survey Data^b

	Employment (in thousands)			Change (in thousands)		Percent Change	
	3rd Qtr. 2007	2nd Qtr. 2007	3rd Qtr. 2006	From Last Quarter	From Last Year	From Last Quarter	From Last Year
Total	5,437.4	5,434.0	5,437.3	3.4	0.1	0.1%	0.0%
Goods-Producing Industries	1,019.8	1,022.7	1,034.3	-2.9	-14.5	-0.3%	-1.4%
Natural Resources and Mining	11.4	11.2	11.6	0.2	-0.2	1.8%	-1.7%
Construction	229.4	230.7	228.8	-1.3	0.6	-0.6%	0.3%
Manufacturing	779.0	780.8	793.9	-1.8	-14.9	-0.2%	-1.9%
Durable Goods	533.6	535.9	547.0	-2.3	-13.4	-0.4%	-2.4%
Nondurable Goods	245.4	244.9	246.9	0.5	-1.5	0.2%	-0.6%
Service-Providing Industries	4,417.6	4,411.3	4,403.0	6.3	14.6	0.1%	0.3%
Trade, Transportation, and Utilities	1,046.6	1,048.2	1,046.1	-1.6	0.5	-0.2%	0.0%
Wholesale Trade	239.1	239.2	238.3	-0.1	0.8	0.0%	0.3%
Retail Trade	600.3	602.8	603.7	-2.5	-3.4	-0.4%	-0.6%
Transportation, Warehousing, and Utilities	207.2	206.2	204.1	1.0	3.1	0.5%	1.5%
Information	87.3	87.6	88.3	-0.3	-1.0	-0.3%	-1.1%
Financial Activities	303.0	304.1	306.7	-1.1	-3.7	-0.4%	-1.2%
Finance and Insurance	237.2	237.8	238.5	-0.6	-1.3	-0.3%	-0.5%
Real Estate and Rental and Leasing	65.8	66.3	68.2	-0.5	-2.4	-0.8%	-3.5%
Professional and Business Services	664.8	660.9	657.3	3.9	7.5	0.6%	1.1%
Professional and Technical Services	241.8	242.9	239.5	-1.1	2.3	-0.5%	1.0%
Management of Companies and Enterprises	102.1	102.2	102.0	-0.1	0.1	-0.1%	0.1%
Administrative, Support, and Waste Services	320.9	315.8	315.8	5.1	5.1	1.6%	1.6%
Educational and Health Services	790.6	788.5	779.1	2.1	11.5	0.3%	1.5%
Educational Services	98.4	98.2	96.9	0.2	1.5	0.2%	1.5%
Health Care and Social Assistance	692.2	690.3	682.2	1.9	10.0	0.3%	1.5%
Leisure and Hospitality	499.6	501.3	500.8	-1.7	-1.2	-0.3%	-0.2%
Arts, Entertainment, and Recreation	63.7	64.3	66.1	-0.6	-2.4	-0.9%	-3.6%
Accommodation and Food Services	435.9	437.0	434.7	-1.1	1.2	-0.3%	0.3%
Other Services	223.2	222.4	222.6	0.8	0.6	0.4%	0.3%
Government	802.5	798.3	802.1	4.2	0.4	0.5%	0.0%
Federal Government	76.3	75.9	76.2	0.4	0.1	0.5%	0.1%
State Government	168.3	167.2	169.8	1.1	-1.5	0.7%	-0.9%
Local Government	557.9	555.2	556.1	2.7	1.8	0.5%	0.3%

^aSubtotals may not add to totals due to rounding. All data exclude military personnel.

^bFrom the Current Employment Statistics Survey, a monthly survey of approximately 12,100 employers conducted by ODJFS in cooperation with the U.S. Bureau of Labor Statistics. Estimates represent nonagricultural wage and salary jobs by place of work.

Trends in Ohio Nonagricultural Wage and Salary Employment

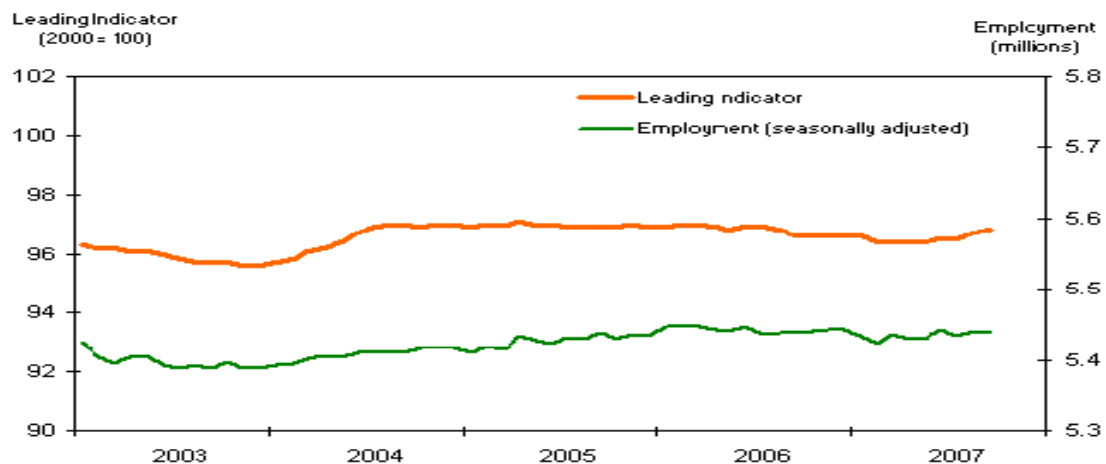


- Since January 2000, Ohio's goods-producing industries (manufacturing, construction and natural resources and mining) have lost 21.2 percent of their employment while service-providing industries have risen 1.9 percent.
- In comparison, the U.S. has lost 9.5 percent of the employment in goods-producing industries while service-providing industries increased 9.4 percent.

Leading Indicators: Ohio and U.S. (Seasonally Adjusted)

Ohio's composite index of leading indicators increased 0.3 percentage point to 96.7 in the third quarter of 2007, suggesting some employment growth through the holiday season. The national composite index of leading economic indicators also rose by 0.3 percentage point, and was up slightly from a year ago.

Ohio Leading Indicator and Employment



The Ohio third quarter averages of individual components (not seasonally adjusted) in the index overall were mixed. Permits for new housing construction continued to decline, and were more than one-fifth lower than the third quarter of 2006. Initial claims for unemployment insurance were up from the second quarter, but were lower than during the third quarter of 2006. The average weekly hours for manufacturing production workers were higher than in the second quarter, and compared to a year ago.

Economic Indicators	Data			Change		Percent Change	
	3rd Qtr. 2007	2nd Qtr. 2007	3rd Qtr. 2006	From Last Quarter	From Last Year	From Last Quarter	From Last Year
Ohio							
Leading Indicator Index (2000=100)	96.7	96.4	96.8	0.3	-0.1	0.3%	-0.1%
Average Initial Claims for Unemployment Insurance	45,787	43,084	48,598	2,703	-2,811	6.3%	-5.8%
Average Weekly Hours for Manufacturing	42.0	41.7	41.4	0.3	0.6	0.7%	1.4%
Average Valuation of Housing Permits (millions of dollars)	453.502	567.699	577.331	-114.197	-123.829	-20.1%	-21.4%
Average Number of Housing Permits	2,806	3,284	3,571	-478	-765	-14.6%	-21.4%
National Data							
National Composite Index of Leading Economic Indicators (1996=100)	138.0	137.7	137.4	0.3	0.6	0.2%	0.4%
U.S. Domestic Auto Production (annualized in millions)	3.554	4.198	3.953	-0.644	-0.399	-15.3%	-10.1%
Difference between 10-Year and 1-Year Treasuries, Constant Maturities	0.22	-0.09	-0.19	0.31	0.41	344.4%	215.8%
Average Number of Housing Permits	113,379	134,801	145,971	-21,422	-32,592	-15.9%	-22.3%

Jobs Gained or Lost

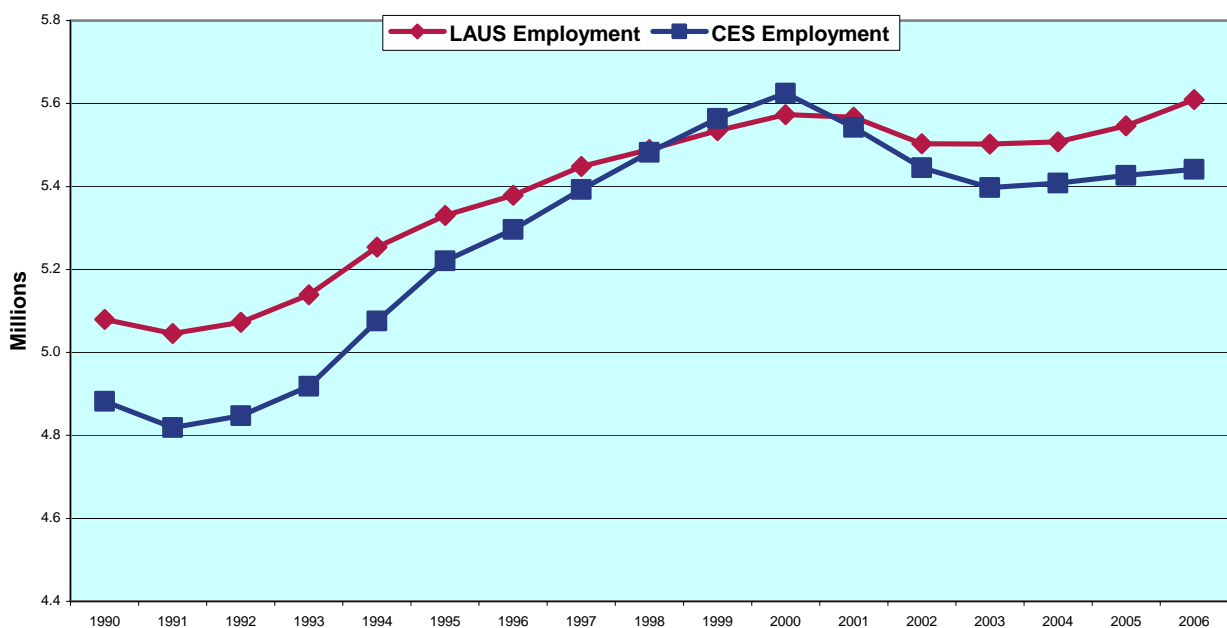
Current Employment Survey (CES)

The most reliable and most easily understood statistic on jobs is the nonagricultural wage and salary employment which comes from the Current Employment Survey (see the Technical Notes section for more detail). This business establishment survey tracks most closely with business cycle changes and is the statistical source most heavily relied on by labor economists, including those at the Bureau of Labor Statistics. It provides information on jobs lost or gained from month-to-month and over the year. The trend in nonagricultural employment is CES data. Of course, there is considerable dynamic activity behind these figures in respect to job changes, layoffs and hiring activity, which in themselves are not represented in the net job statistic.

Local Area Unemployment Statistics (LAUS) and Current Population Survey (CPS)

The employment numbers published under the Employment Situation Indicators chart for Ohio (LAUS data) earlier in this packet are heavily dependent on the Current Population Survey (often referred to as the "Household" survey). These figures are useful for understanding the unemployment rate and can be useful for the labor economist's analysis of what is happening in the labor market. However, as a general measure of job growth or decline and corresponding public announcements, it has proven problematic. The CPS for Ohio contains a small sample of households, tends to be highly volatile and is benchmarked (i.e., controlled to a known universe) only once every ten years with the decennial census. It has not proven to be a good measure of business cycles. For example, the LAUS employment numbers showed only a slight decline at the onset of the 2001 recession and a much more rapid recovery in 2005 and 2006 than indicated by the CES data (see chart below). The LAUS data have no measure of job loss or gain by industry.

Ohio LAUS and CES Employment Trends, 1990-2006



Mass Layoff Announcements

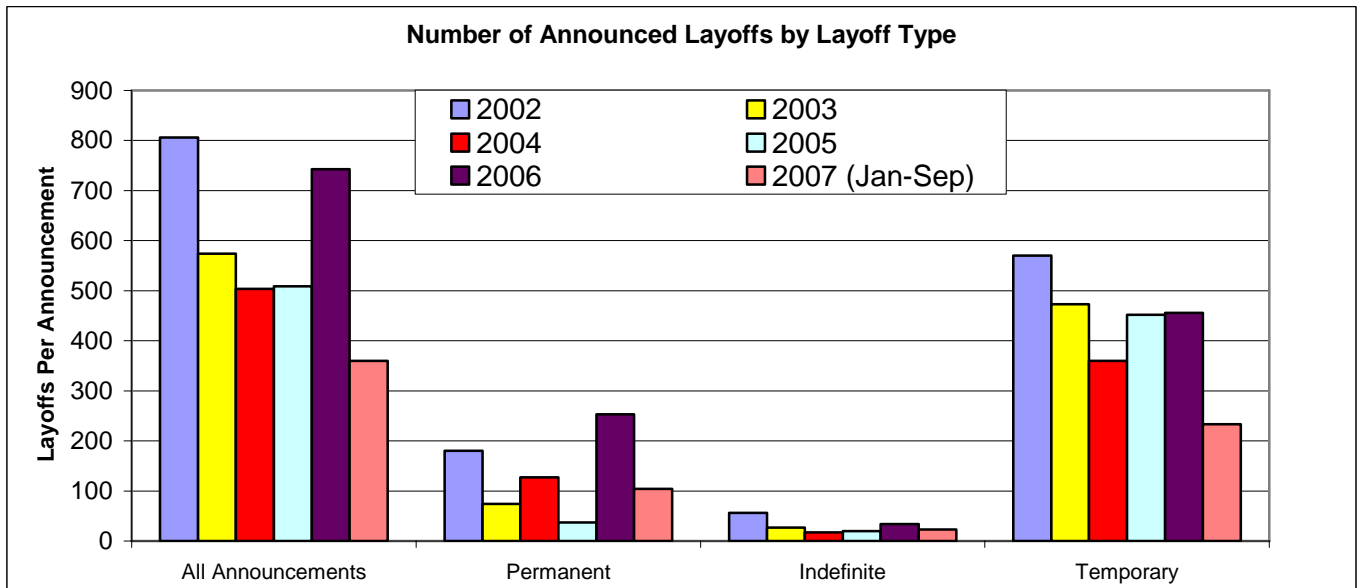
Mass layoff announcements are reported by the business entity. These statistics have proven useful to explain major shifts in the employment situation that may occur at the local level from one month to another. However, they must be used with caution, particularly when considering them at a summary level or as a state-wide indicator. These statistics have the following caveats.

- ODJFS requests employers to provide the greatest number of workers potentially affected and actual numbers are normally less.
- Any employer may announce mass layoffs multiple times and / or for multiple locations over the year.
- There is no formal process or monitoring to assure consistent reporting.
- These numbers are reported "intent" and are never independently verified.
- They may be reported but then circumstances change that decrease the size of the layoff or eliminate the need for a layoff.
- Even if a layoff materializes, it does not necessarily mean people are unemployed as a result. They may retire, work part time, take severance pay or find another job.
- A number of the reported layoffs are part of a normal business cycle, where the business normally restricts operations for product change-over, inventory processes or because of seasonal demand cycles.
- Some layoffs are very short lived, while others could take a year or more to complete. There is no precise measure of timing.

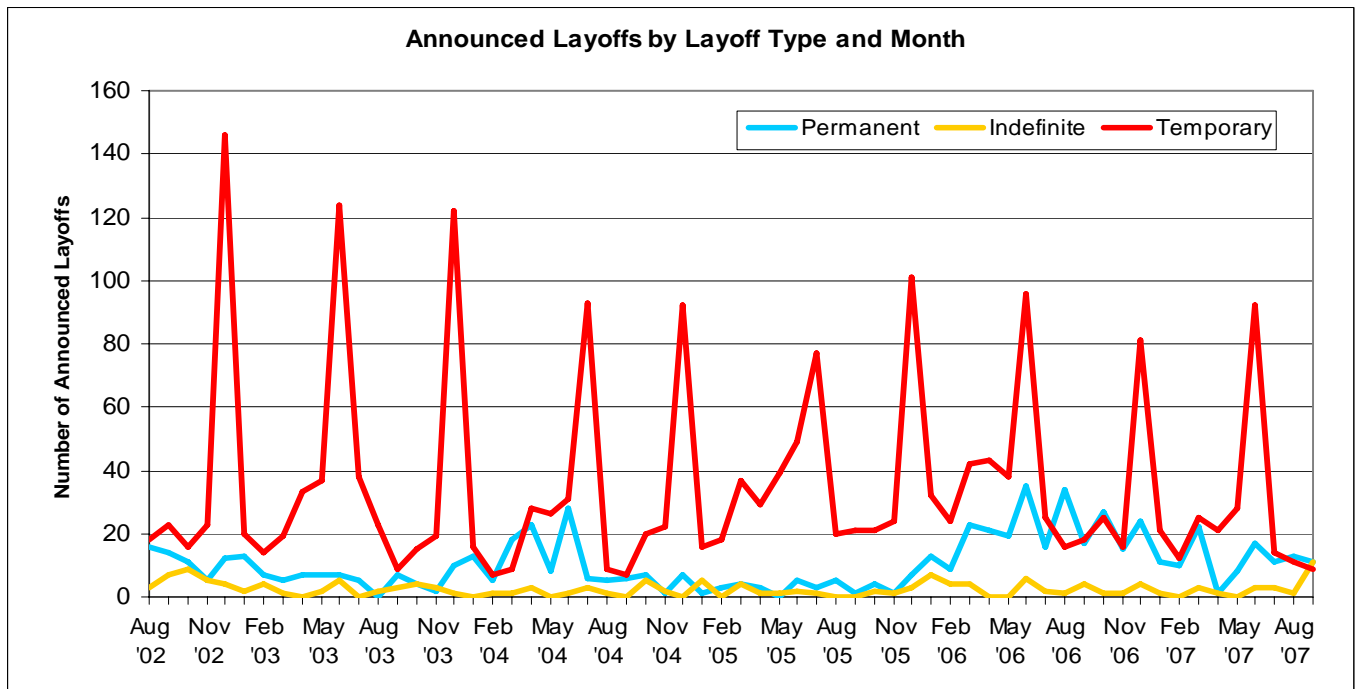
See Mass Layoff Announcements table and graph on next page.

Mass Layoff Announcements, 2002 to September 2007

Year	Layoff Announcements	Announced Laid Off	Permanent Layoffs		Indefinite Layoffs		Temporary Layoffs	
			Events	Employees	Events	Employees	Events	Employees
2002	806	147,385	180	14,563	56	6,969	570	125,853
2003	574	128,497	74	9,187	27	3,201	473	116,109
2004	504	100,098	127	12,240	17	1,781	360	86,077
2005	509	131,712	37	4,894	20	2,072	452	124,746
2006	743	131,628	253	13,481	34	3,224	456	114,923
2007 (Jan-Sep)	360	58,567	104	5,343	23	2,243	233	50,981



The graph below is an example of the highly seasonal nature of these mass layoff announcements.



Related Information

Related Information

Business Employment Dynamics: This new set of statistics generated from the Quarterly Census of Employment and Wages was released for the first time for Ohio, beginning with analysis for the fourth quarter of 2006, in August 2007. These quarterly data series consist of gross job gains and gross job losses statistics from 1992 forward. These data help to provide a picture of the dynamic state of the labor market. An ODJFS summary on the Ohio data is available at http://lmi.state.oh.us/cep_data/quarterly_n/2006_4q_bed.pdf.

Community Economic Development HotReport: This groundbreaking product is the work of the Census Bureau's Data Integration Division. It uses new technology to retrieve and analyze data from myriad data sets in- and outside of the Census Bureau, and displays it visually on interactive web pages. These new reports are available at <http://ced.census.gov>.

What's in a Word Wins National Award: Winners of the National Association of State Workforce Agencies 2007 Labor Market Information Communications/Publications Awards were announced the week of October 1. There were five categories of recognition and Ohio was the winner for a product or service to meet the needs of state and local workforce investment board customers. "What's in a Word - Maybe Your Next Job" provides information on key words employers find important in selecting which resumes to read. Honest use of key words increases the probability an employer will read the resume and schedule an interview. Visit <http://lmi.state.oh.us/research/WhatsinaWord.pdf> for more information.

Labor Surplus Areas: Labor surplus areas, which receive preference for federal contracts, are updated each October and remain in effect until the following September 30. Ohio had 40 counties designated as labor surplus areas for fiscal year 2008. Please visit <http://www.doleta.gov/programs/lsa.cfm> for more information.

Multiple Jobholding in States in 2006: The national multiple jobholding rate was 5.2 percent in 2006, down slightly from 5.3 percent in 2005. Ohio was one of 23 states and the District of Columbia to post an increase. Ohio's rate increased from 6.2 percent in 2005 to 6.4 percent in 2006. For more information, see <http://www.bls.gov/opub/mlr/2007/09/rgtrends.pdf>.

Workforce Analysis Reports for Economic Development Regions: The Bureau of Labor Market Information posted workforce analysis reports for economic development regions early in November to help inform workforce and economic development professionals and others about regional conditions. These publications review demographic, labor force and economic characteristics, including trends in population, employment, unemployment rates, income and housing. They complement reports that had been posted earlier in 2007 for the State of Ohio and Workforce Investment Areas. They are available at <http://lmi.state.oh.us/wa/workforceanalysis.htm>.

Technical Notes

Technical Notes

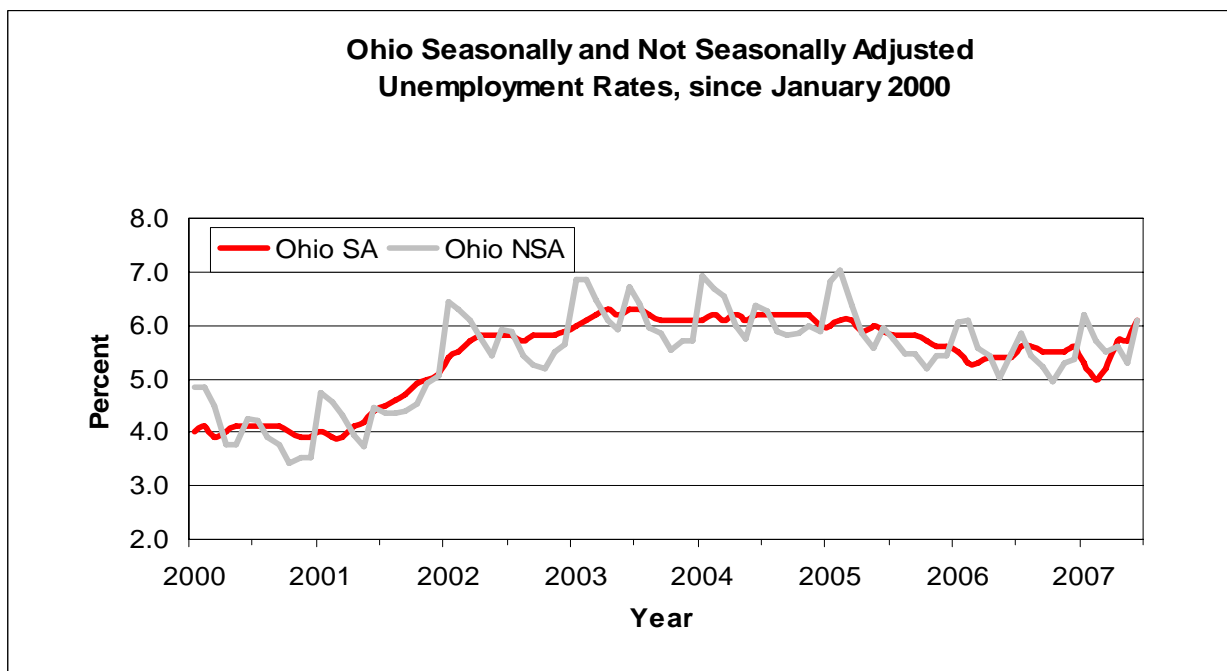
Seasonal Adjustment

Ohio and U.S. unemployment rates and labor force data are published monthly by the Bureau of Labor Statistics. Two sets of data are published: seasonally adjusted data and not seasonally adjusted data. County data are not seasonally adjusted because seasonal adjustment factors tend to be unreliable for small areas.

Seasonal adjustment is used to remove fluctuations in unemployment and labor force trends that normally occur with changes in the season. The removal of seasonal variation allows evaluation of the unemployment rates as an indicator of economic change.

Seasonal variation in the employment situation occurs for a variety of natural and institutional reasons. Examples include reduction of employment involving outdoor activities during winter, large changes in labor force and unemployment levels with opening and closing of schools, and employment reductions during the automobile model changeover period. The overall impact of such events is a seasonal rise in unemployment rates during the winter months, usually peaking in January and February, and a drop in unemployment rates during the spring and late summer with May and September typically the low months.

The graph below presents the wide month-to-month changes that occur in the not seasonally adjusted data which reinforces our use of seasonally adjusted data, when available.



Unemployment Rates and Related Data

Employment Situation: Ohio and U.S

U.S. data are derived from a national household survey known as the Current Population Survey (CPS). This survey is conducted monthly by the U.S. Bureau of the Census for the U.S. Bureau of Labor Statistics (BLS). The survey collects data on the demographic characteristics and labor force status of household members, including employment and unemployment from approximately 60,000 households.

Ohio data are developed in cooperation with the BLS using the State Time Series Analysis and Review System (STARS). This method relies heavily on monthly unpublished CPS data as well as current wage and salary employment and unemployment insurance statistics. The time series model is designed to provide data on employment of all types of workers, based on place of residence.

Ohio Monthly Unemployment Insurance Initial Claims

Initial claims information was obtained from administrative records of the Ohio unemployment compensation program, operated by the Ohio Department of Job and Family Services.

An initial claim is defined as any notice of unemployment filed to request a determination of entitlement to and eligibility for compensation, or to begin a second or subsequent period of eligibility within a benefit year. Initial claims counts presented in this report include new, additional, transitional, and interstate agent claims. Beginning in January 2005, transitional claims are excluded from counts since they do not represent newly unemployed workers.

Average Duration of Unemployment and Unemployment Insurance Benefit Exhaustions: Ohio and U.S

Average duration of unemployment was calculated as the total number of weeks compensated for the previous 12 months divided by the total number of first payments for the same 12 month period. First payment is defined as the first payment in a benefit year for a week of unemployment.

Exhaustion rates were calculated as the number of claimants exhausting benefits divided by the number of claimants' first receiving benefits two quarters earlier.

Monthly totals for the average duration of unemployment and the number of exhaustions in the U.S. and Ohio were obtained from the U.S. Department of Labor, Employment and Training Administration (ETA). The national ETA office collects unemployment data from the states, then compiles and redistributes

state and national unemployment insurance statistics through a required reporting mechanism in which all states participate. The Claims and Payment Activities report (ETA-5159) serves as the basis for these figures. The DOL-ETA site is <http://workforcesecurity.doleta.gov/unemploy/content/data.asp>

Employment Data

Ohio Nonagricultural Wage and Salary Employment

Ohio nonfarm employment data are derived from an employer survey known as the Current Employment Survey (CES). This survey is conducted monthly by ODJFS/BLMI, in cooperation with the BLS. The data are compiled from voluntary reports from 11,800 Ohio employers. The employer survey provides data on total employment, and on hours and earnings of production workers, by type of industry.

The employer survey does not include the self-employed, unpaid family workers, private household workers, agricultural workers, or those on strike or unpaid vacation and are based on place of work. Analysts generally regard the nonfarm data as the most reliable indicator of the current economic conditions due to its large sample size and the fact that the data are benchmarked annually to the complete count of employment from administrative unemployment insurance records.

Trends in Ohio Nonagricultural Wage and Salary Employment

Goods-producing industries include natural resources and mining, construction, and manufacturing. Service-providing industries include trade, transportation and utilities, information, financial activities, professional and business services, educational and health services, leisure and hospitality, other services, and government.

Ohio Leading Indicators

The leading indicator index for Ohio is designed to anticipate changes in the economy based on changes in six component data series. At the national level, the Gross National Product is an acceptable measure of general levels of economic activity, but no monthly measure of the dollar value of goods and services produced at the state level exists. Therefore, seasonally adjusted employment estimates (CES data referenced above) are used to evaluate how well the economy is performing. The amount of variability in the composite indexes has been reduced by computing a six-month moving average.

Six components consistently explained a large portion of employment variation and business cycle movement. Three are national components: the national

composite index of leading indicators, domestic auto production and the spread between 10-year and 1-year treasury interest rates. The state components are initial claims for unemployment insurance, average weekly hours in manufacturing, and the valuation of building permits for new residential construction. The index is normalized to the annual average total nonfarm wage and salary employment level in 2000.

Web Links for additional information

U.S. Bureau of Labor Statistics site: <http://www.bls.gov>

Ohio Bureau of Labor Market Information site: <http://lmi.state.oh.us>

Office of Workforce Development
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Columbus, OH 43216-1618

**Bureau of Labor Market Information
Business Principles for Workforce Development**

Partner with the workforce and economic development community.

Develop and deploy new information solution tools and systems for the workforce and economic development community.

Provide products and services that are customer and demand driven.

Be known as an important and reliable source for information solutions that support workforce development goals and outcomes.

This quarterly report was prepared by the Ohio Department of Job and Family Services to meet the requirements of the Ohio Revised Code 6301.10.

For further information, visit our Web sites at <http://OhioWorkforceInformer.org> and <http://lmi.state.oh.us> or contact the Ohio Bureau of Labor Market Information at 1-888-2WORK-411 or 1-888-296-7541.

Ted Strickland, *Governor*
State of Ohio

Helen E. Jones-Kelley, *Director*
Ohio Department of Job and Family Services

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