

**MEETING OF THE BOARD OF DIRECTORS  
OF THE  
ARLINGTON ECONOMIC DEVELOPMENT CORPORATION**

**Agenda  
July 18, 2023 AT 4:30p.m.  
ARLINGTON CITY HALL  
COUNCIL BRIEFING ROOM  
3<sup>RD</sup> FLOOR  
101 W. ABRAM STREET  
ARLINGTON, TX 76010**

Members of the public who wish to speak on a listed agenda item for action will be asked for their comments at the appropriate time.

- I. Call to Order
- II. Consideration of Minutes
  - A. June 20, 2023 Meeting
- III. Financial Report
- IV. Real Estate Report
- V. Industry Spotlight Report
- VI. First Rate Accelerator Update
- VII. Tarrant County Workforce Solutions Update
- VIII. Executive Session

Discussion of matters permitted by the following sections of V.T.C.A, Government Code, Chapter 551:

  - A. Section 551.087, Deliberation Regarding Economic Development Negotiations
    - Offers of Incentives to Business Prospects
  - B. Section 551.072, Deliberation Regarding Real Property
    - Discussion regarding the possible purchase, exchange, lease, or value of real property for eligible projects of the Arlington Economic Development Corporation.
- IX. Future Agenda Items
- X. Adjourn

**MEETING OF THE BOARD OF DIRECTORS  
OF THE  
ARLINGTON ECONOMIC DEVELOPMENT CORPORATION**

**MINUTES OF THE  
ARLINGTON ECONOMIC DEVELOPMENT CORPORATION  
BOARD OF DIRECTORS  
June 20, 2023**

The Board of Directors of the Arlington Economic Development Corporation convened in Regular Session on June 20, 2023, at 4:30 p.m., in Arlington City Hall, 3<sup>rd</sup> Floor, 101 W. Abram Street, Arlington, Texas, with the meeting being open to the public and notice of said meeting, giving the date, place and subject thereof, having been posted as prescribed by V.T.C.A., Government Code, Chapter 551, with the following members present, to-wit:

Board Members:

Michael Jacobson	§	President
Mojoy Haddad	§	Vice President
John Whiteley	§	Treasurer
Gerald Alley	§	Board Member
Kate Miller	§	Board Member

Absent:

Jollyn Mwisongo	§	Secretary
Carmenza Moreno	§	Board Member

And

Trey Yelverton	City Manager
Broderick Green	Executive Director
Molly Shortall	City Attorney
Ethan Klos	Treasurer
Erin Clark	Public Funds Administrator
Stephanie Dimas	Senior Public Funds Analyst
Jasmine Amo	Economic Development Corporation Specialist
Alex Fitzgerald	Economic Development Corporation Specialist
Stuart Young	Real Estate Manager
Lyndsay Mitchell	Strategic Initiatives Officer
Marcus Young	Economic Development Specialist
Alicia Winkelblech	Director of Transportation
Trent Ballard	Airport Manager
Kevin McGlaun	Real Estate Consultant
Erica Yingling	Economic Development Corporation Coordinator

I. Call to Order

President M. Jacobson called the meeting to order at 4:32 p.m.

II. Consideration of Minutes

A. May 30, 2023 Meeting

Treasurer J. Whiteley made a motion to approve the minutes of the May 30, 2023 Board meeting. Seconded by Vice President M. Haddad, the motion carried with 5 ayes and 0 nays.

APPROVED

III. Financial Report

No questions or comments were stated.

IV. Real Estate Report

No questions or comments were stated.

V. Industry Spotlight Report

No questions or comments were stated.

VI. Items for Action:

A. Resolution

A resolution authorizing the Executive Director of the Arlington Economic Development Corporation (AEDC) to execute a Professional Services Agreement for assistance with website marketing and media strategy with EDSuite, LLC.

Broderick Green, Executive Director, and Aaron Rollins, EDSuite, presented the resolution for consideration.

Vice President M. Haddad made a motion to approve the resolution. Seconded by Board Member G. Alley, the motion carried with 5 ayes and 0 nays.

AEDC RESOLUTION NO. 23-012

B. Resolution

Approve a resolution authorizing the Executive Director of the Arlington Economic

Development Corporation to negotiate and execute a contract with Intercon Environmental, Inc. for the abatement of asbestos and the demolition of existing structures on real property located at 1411 Altman Drive, 1413 Altman Drive, 1404 N Center Street, 1407 N Center Street, 1409 N Center Street and 1413 N Center Street in an amount not to exceed \$321,326.13 relative to a project authorized by Section 501.101 of the Texas Local Government Code.

Broderick Green, Executive Director, presented the resolution for consideration.

Treasurer J. Whiteley made a motion to approve the resolution. Seconded by Board Member G. Alley, the motion carried with 5 ayes and 0 nays.

#### AEDC RESOLUTION NO. 23-013

#### VII. Executive Session

At 4:48 p.m., President M. Jacobson announced that the Board would convene in Executive Session.

Discussion of matters permitted by the following sections of V.T.C.A, Government Code, Chapter 551:

- A. Section 551.087, Deliberation Regarding Economic Development Negotiations
  - 1. Offers of Incentives to Business Prospects

At 5:37 p.m., President M. Jacobson announced the Executive Session was adjourned, and the Board immediately reconvened in Open Session.

#### VIII. Executive Director's Report

Broderick Green, Executive Director, provided information relative to Area Development Consultant Survey and upcoming events and sponsorships.

#### IX. Future Agenda Items

No items added.

#### X. Adjourn

There being no further business, the meeting was adjourned at 5:56 p.m.

**COA Expenditures by Cost Center**

Budget Structure Non-Operating Budget  
 Amount Type Activity  
 Period FY23 - May  
 Cost Center Hierarchy Economic Development Corporation  
 From Budget Date 10/1/2022  
 To Budget Date 9/30/2023

Cost Center	Budget Appropriation	May Expenditures	Expenditures to Date	Encumbrances	Actuals + Obligations	Unexpended Balance	%Exp
<b>CC973005 Economic Development Corporation Projects</b>	<b>20,099,653</b>	<b>2,812,619</b>	<b>6,845,034</b>	-	<b>6,845,034</b>	<b>13,254,619</b>	<b>34.06%</b>
61000:Purchase/Contract	20,099,653	2,812,619	6,845,034	-	6,845,034	<b>13,254,619</b>	34.06%
<b>CC973010 Economic Development Corporation Operations</b>	<b>2,463,835</b>	<b>131,957</b>	<b>858,303</b>	<b>(58,341)</b>	<b>799,962</b>	<b>1,663,874</b>	<b>32.47%</b>
50000:Salaries and Wages	734,902	32,989	294,166	-	294,166	<b>440,735</b>	40.03%
55000:Benefits	193,432	8,374	76,340	-	76,340	<b>117,092</b>	39.47%
60000:Supplies	120,000	-	1,727	687	2,413	<b>117,587</b>	2.01%
61000:Purchase/Contract	516,502	64,878	366,588	(41,078)	325,510	<b>190,992</b>	63.02%
62000:Utilities	20,000	-	-	-	-	<b>20,000</b>	0.00%
63000:Maintenance and Repair	450,000	3,720	15,454	-	15,454	<b>434,546</b>	3.43%
65000:Miscellaneous Expense	305,000	21,450	65,382	(21,450)	43,932	<b>261,068</b>	14.40%
66000:Travel and Training	118,000	546	37,471	3,500	40,971	<b>77,029</b>	34.72%
67000:Interdepartmental Expense	6,000	-	1,175	-	1,175	<b>4,825</b>	19.59%

**REVENUES**

TOTAL	15,576,884	Sales Month	Revenue Received
	1,820,707	October 2022	December 2022
	1,903,338	November 2022	January 2023
	2,375,933	December 2022	February 2023
	1,660,636	January 2023	March 2023
	1,603,818	February 2023	April 2023
	2,339,212	March 2023	May 2023
	1,886,750	April 2023	June 2023
	1,986,490	May 2023	July 2023
		June 2023	August 2023
		July 2023	September 2023
		August 2023	October 2023
		September 2023	November 2023

COA Expenditures by Cost Center

Budget Structure

Amount Type

Period

Cost Center Hierarchy

From Budget Date

To Budget Date

Non-Operating Budget

Activity

FY23 - May

Economic Development Corporation

10/1/2022

9/30/2023

Cost Center	Budget Appropriation	May Expenditures	Expenditures to Date	Encumbrances	Actuals + Obligations	Unexpended Balance	%Exp
<b>CC973005 Economic Development Corporation Projects</b>	<b>20,099,653</b>	<b>2,812,619</b>	<b>6,845,034</b>	-	<b>6,845,034</b>	<b>13,254,619</b>	<b>34.06%</b>
61000:Purchase/Contract	20,099,653	2,812,619	6,845,034	-	6,845,034	13,254,619	34.06%
SC0533 - Special Services	20,099,653	2,812,619	6,845,034	-	6,845,034	13,254,619	34.06%
SC0574 - Professional Services	-	-	-	-	-	-	0.00%
<b>CC973010 Economic Development Corporation Operations</b>	<b>2,463,835</b>	<b>131,957</b>	<b>858,303</b>	<b>(58,341)</b>	<b>799,962</b>	<b>1,663,874</b>	<b>32.47%</b>
50000:Salaries and Wages	734,902	32,989	294,166	-	294,166	440,735	40.03%
SC50002 - Salaries: Operations	734,902	32,989	294,166	-	294,166	440,735	40.03%
55000:Benefits	193,432	8,374	76,340	-	76,340	117,092	39.47%
SC50004 - Benefits: Longevity/Stability	-	-	42	-	42	(42)	0.00%
SC55000 - Benefits : Worker's Comp	1,102	49	417	-	417	685	37.86%
SC55001 - Benefits : Employee Retirement	73,876	3,327	29,819	-	29,819	44,057	40.36%
SC55002 - Benefits : Disability Income Plan	1,617	61	511	-	511	1,106	31.62%
SC55003 - Benefits : Employee Insurance	64,018	3,095	26,124	-	26,124	37,894	40.81%
SC55005 - Benefits : Medicare	10,656	-	3,795	-	3,795	6,861	35.62%
SC55008 - Benefits : Thrift Plan	34,571	1,395	11,839	-	11,839	22,732	34.25%
SC55009 - Benefits : Car Allowance	5,200	400	3,400	-	3,400	1,800	65.38%
SC55010 - Benefits : Phone Allowance	2,392	46	392	-	392	2,000	16.40%
60000:Supplies	120,000	-	1,727	687	2,413	117,587	2.01%
SC0500 - Office Supplies less than \$5,000	10,000	-	724	687	1,411	8,589	14.11%
SC0514 - Other Supplies	3,000	-	-	-	-	3,000	0.00%
SC0516 - Supplies/Computer Hardware	22,000	-	1,002	-	1,002	20,998	4.56%
SC0517 - Office Furniture less than \$5,000	60,000	-	-	-	-	60,000	0.00%
SC0521 - Cost Of Food & Beverage	25,000	-	-	-	-	25,000	0.00%
61000:Purchase/Contract	516,502	64,878	366,588	(41,078)	325,510	190,992	63.02%
SC0533 - Special Services	466,502	61,428	332,853	(43,278)	289,576	176,926	62.07%
SC0566 - Securing Of Properties	-	-	489	-	489	(489)	0.00%
SC0574 - Professional Services	50,000	3,450	33,245	2,200	35,445	14,555	70.89%
62000:Utilities	20,000	-	-	-	-	20,000	0.00%
SC0578 - Electric Service	20,000	-	-	-	-	20,000	0.00%
63000:Maintenance and Repair	450,000	3,720	15,454	-	15,454	434,546	3.43%
SC0583 - Maintenance of Buildings	450,000	3,720	15,454	-	15,454	434,546	3.43%
65000:Miscellaneous Expense	305,000	21,450	65,382	(21,450)	43,932	261,068	14.40%
SC0658 - Advertising	300,000	21,450	64,430	(21,450)	42,980	257,020	14.33%
SC0735 - Employee Reimbursement - non travel/training	5,000	-	952	-	952	4,048	19.03%
66000:Travel and Training	118,000	546	37,471	3,500	40,971	77,029	34.72%
SC0668 - Membership	21,000	-	13,125	-	13,125	7,875	62.50%
SC0669 - Training	6,000	-	4,032	-	4,032	1,968	67.21%
SC0670 - Registration	-	-	4,113	-	4,113	(4,113)	0.00%
SC0671 - Travel	91,000	546	16,201	3,500	19,701	71,299	21.65%
67000:Interdepartmental Expense	6,000	-	1,175	-	1,175	4,825	19.59%
SC0500 - Office Supplies less than \$5,000	-	-	132	-	132	(132)	0.00%
SC0633 - General Services Charges	6,000	-	1,043	-	1,043	4,957	17.39%

# City of Arlington Office Market Overview



**11.9M** +0%  
Prior Period 11.9M

**0** -  
Prior Period 0

**(109K)** -2.2%  
Prior Period (107K)

**10.9%** +1.0%  
Prior Period 9.9%

**\$25.35** +3.0%  
Prior Period \$24.61

**\$153** -0.1%  
Prior Period \$153

**9.2%** +0.6%  
Prior Period 8.6%

### Availability

Vacant SF	1.3M <span>↑</span>
Sublet SF	71.9K <span>↑</span>
Availability Rate	14.0% <span>↑</span>
Available SF	1.7M <span>↑</span>
Available Asking Rent/SF	\$22.19 <span>↑</span>
Occupancy Rate	89.1% <span>↓</span>
Percent Leased Rate	89.9% <span>↓</span>

### Inventory

Existing Buildings	812 <span>↓</span>
Under Construction Avg SF	-
12 Mo Demolished SF	0 <span>↓</span>
12 Mo Occupancy % at Delivery	-
12 Mo Construction Starts SF	0 <span>↓</span>
12 Mo Delivered SF	0 <span>↓</span>
12 Mo Avg Delivered SF	-

### Sales Past Year

Asking Price Per SF	\$110 <span>↓</span>
Sale to Asking Price Differential	-10.0% <span>↑</span>
Sales Volume	\$23.5M <span>↓</span>
Properties Sold	46 <span>↓</span>
Months to Sale	8.7 <span>↑</span>
For Sale Listings	36 <span>↑</span>
Total For Sale SF	506K <span>↑</span>

### Demand

12 Mo Net Absorp % of Inventory	-0.9% <span>↑</span>
12 Mo Leased SF	425K <span>↓</span>
Months on Market	13.2 <span>↑</span>
Months to Lease	7.6 <span>↑</span>
Months Vacant	15.4 <span>↑</span>
24 Mo Lease Renewal Rate	59.6%
Population Growth 5 Yrs	1.1%



# Overview

Arlington/Mansfield Office

12 Mo Deliveries in SF

**11.1K**

12 Mo Net Absorption in SF

**(127K)**

Vacancy Rate

**10.6%**

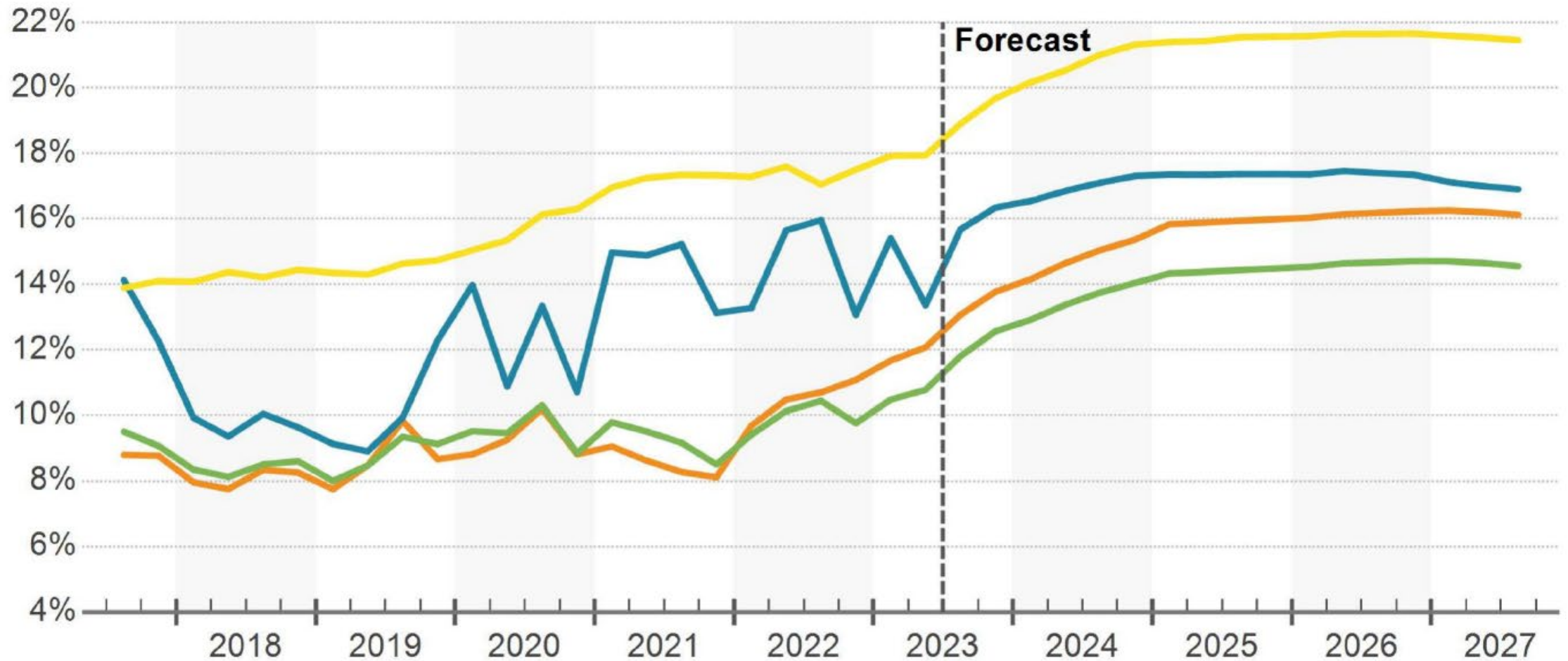
12 Mo Rent Growth

**3.0%**

## KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
4 & 5 Star	2,045,689	12.4%	\$32.97	22.2%	19,973	0	61,500
3 Star	7,322,396	12.2%	\$26.32	15.2%	(5,954)	0	51,050
1 & 2 Star	5,181,943	7.8%	\$21.40	9.0%	6,825	0	0
<b>Submarket</b>	<b>14,550,028</b>	<b>10.6%</b>	<b>\$25.54</b>	<b>14.0%</b>	<b>20,844</b>	<b>0</b>	<b>112,550</b>

### VACANCY RATE

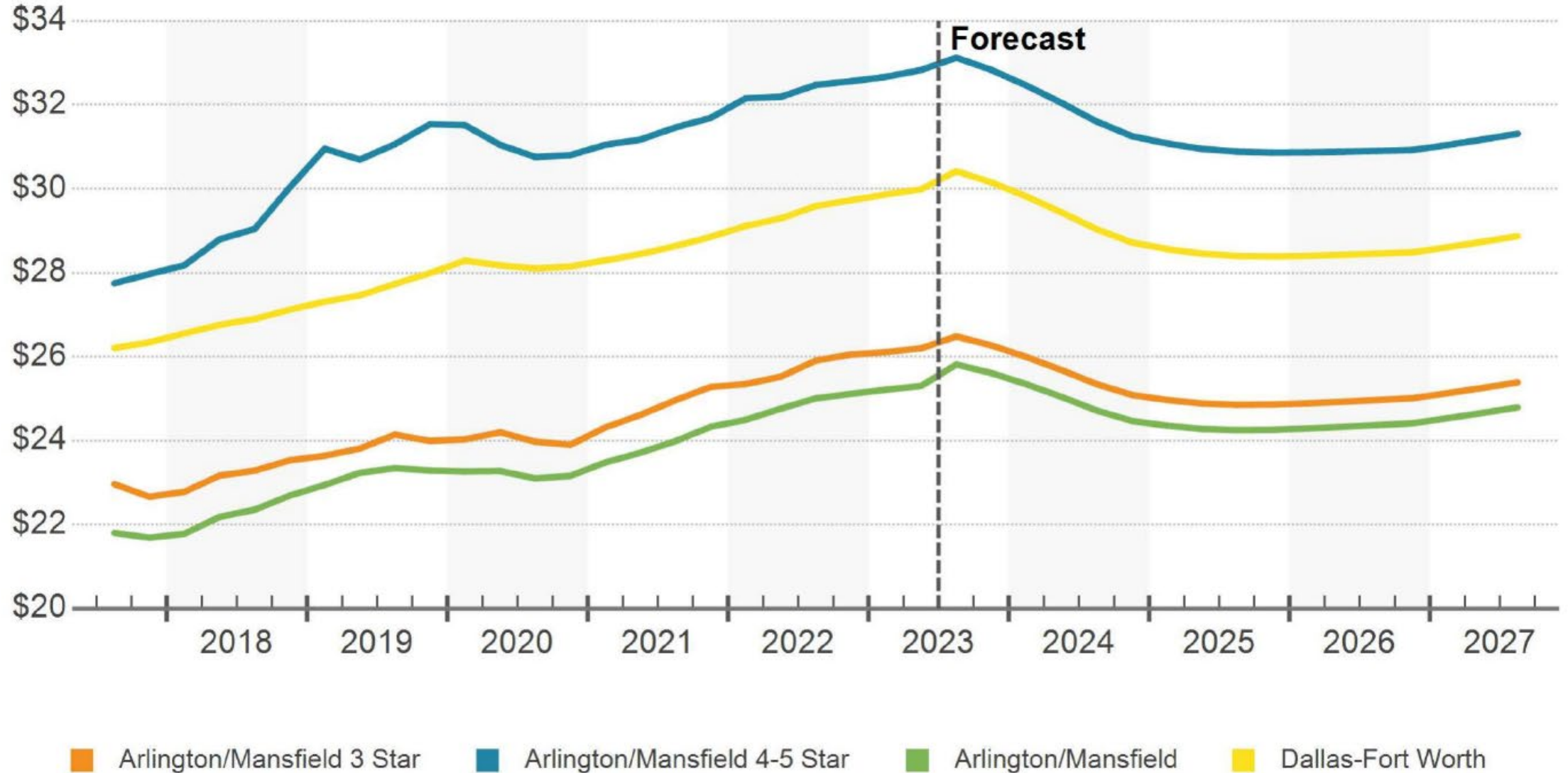


■ Arlington/Mansfield 3 Star ■ Arlington/Mansfield 4-5 Star ■ Arlington/Mansfield ■ Dallas-Fort Worth

# Rent

Arlington/Mansfield Office

## MARKET RENT PER SQUARE FEET



# Construction

Arlington/Mansfield Office

All-Time Annual Avg. Square Feet

Delivered Square Feet Past 8 Qtrs

Delivered Square Feet Next 8 Qtrs

Proposed Square Feet Next 8 Qtrs

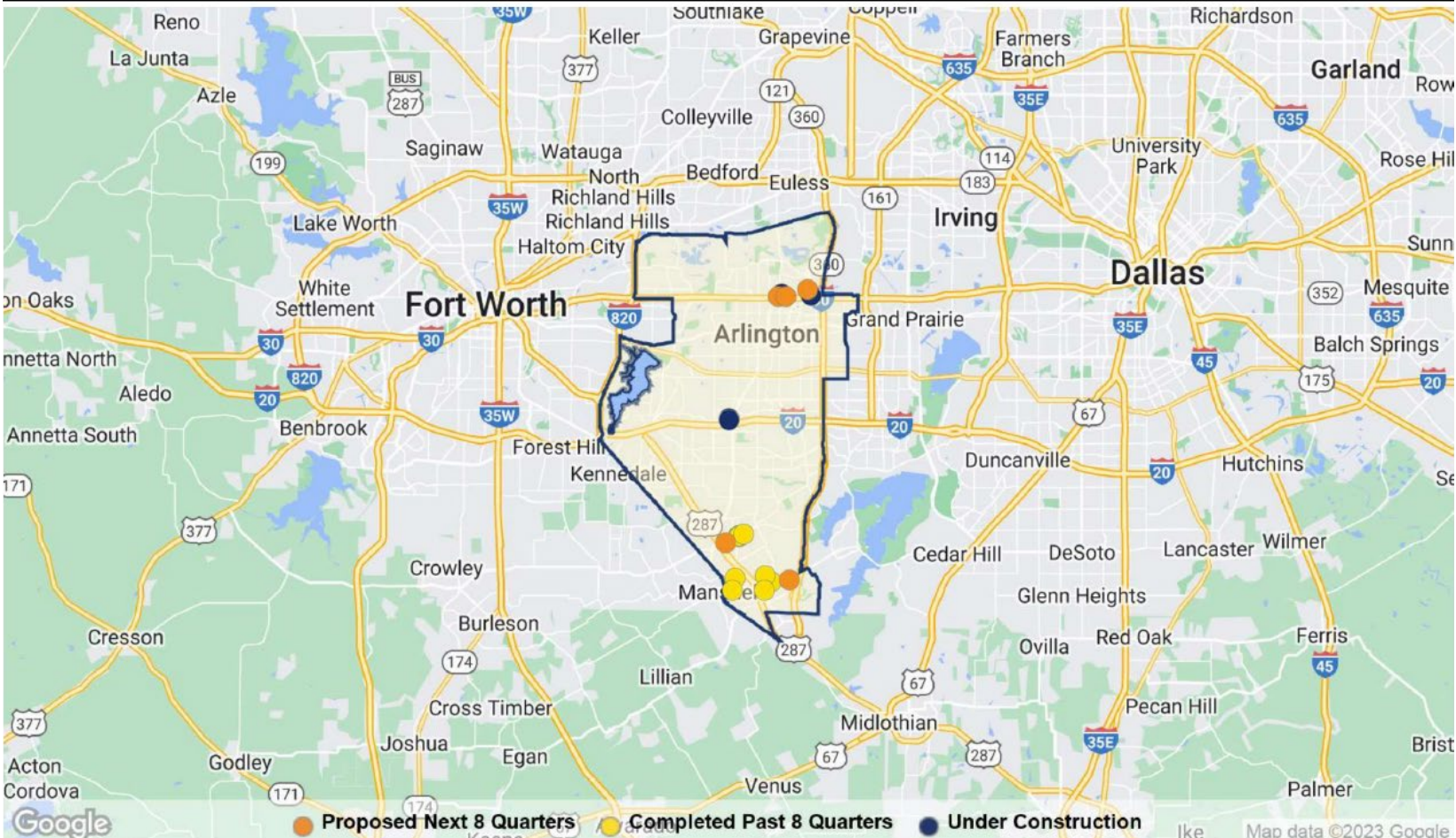
242,388

65,060

112,550

352,567

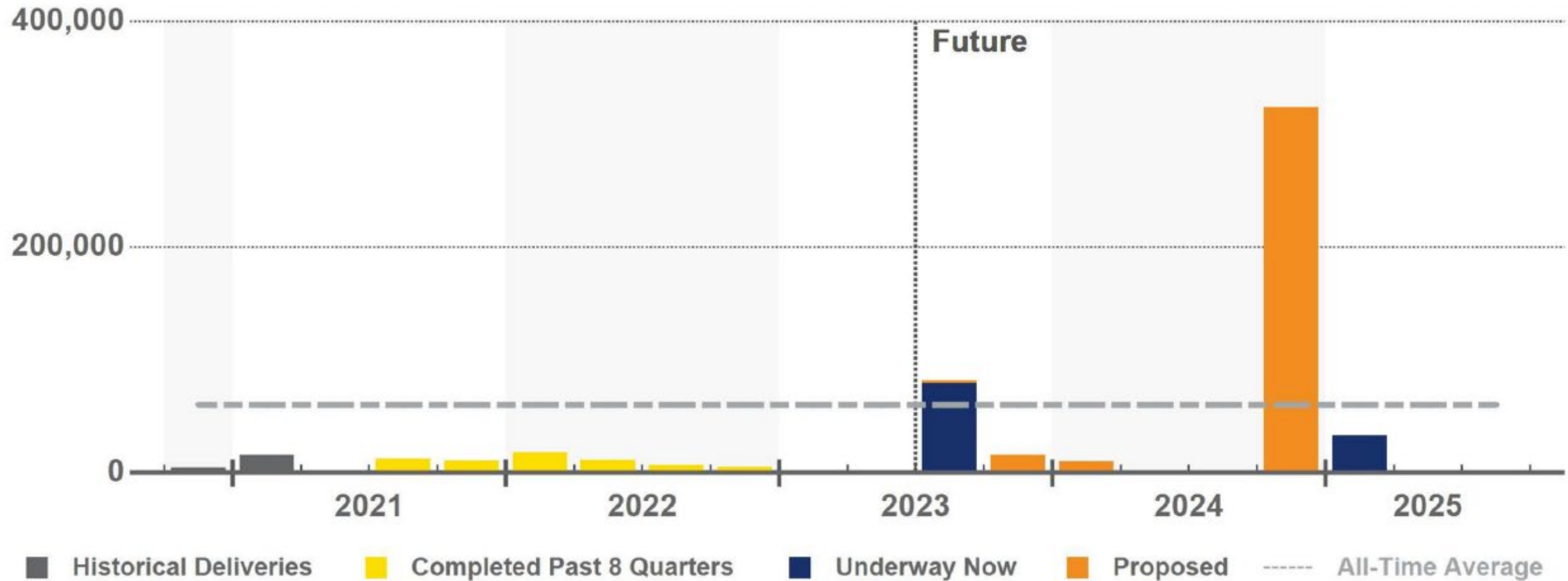
PAST 8 QUARTERS DELIVERIES, UNDER CONSTRUCTION, & PROPOSED



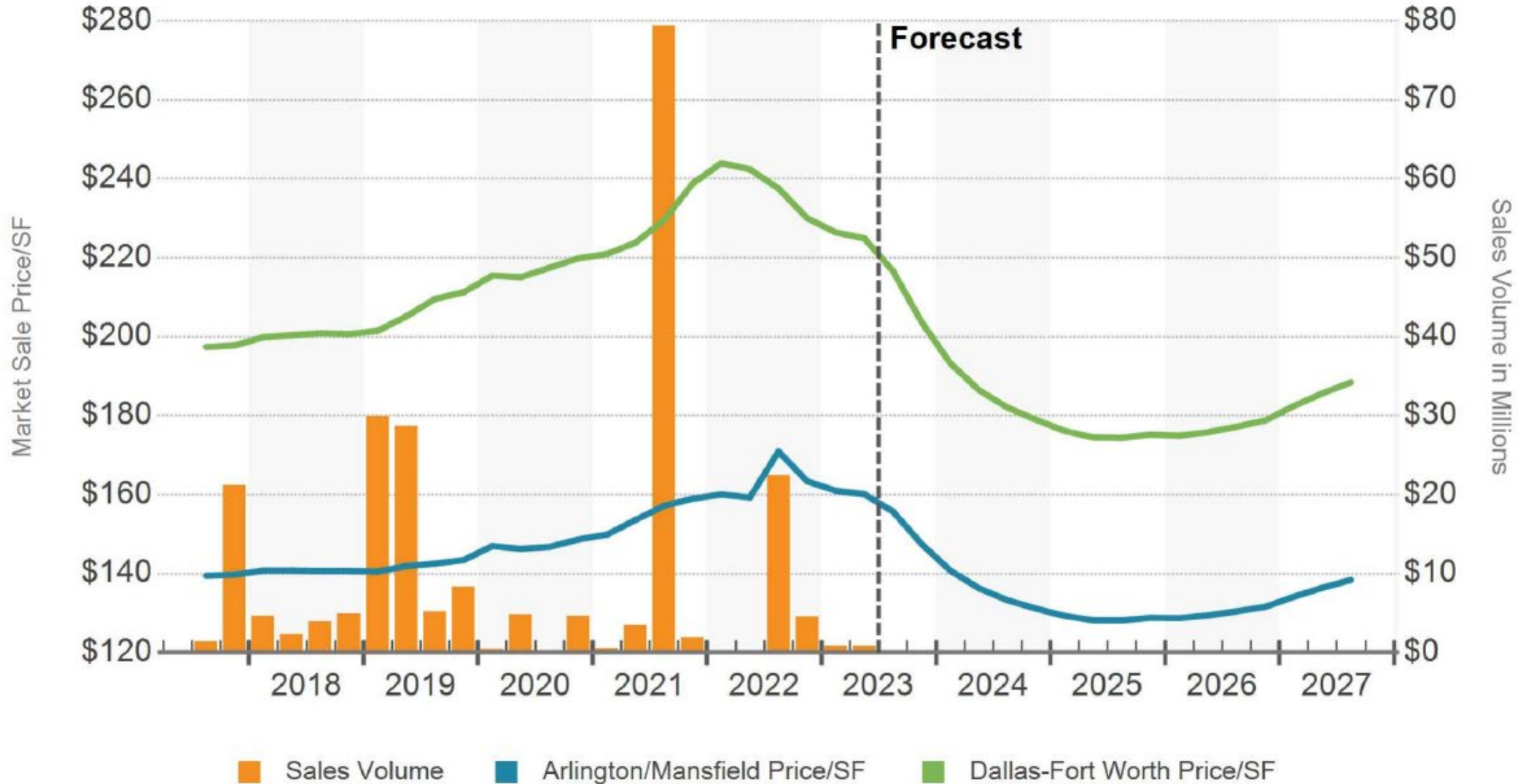
# Construction

Arlington/Mansfield Office

## PAST & FUTURE DELIVERIES IN SQUARE FEET



### SALES VOLUME & MARKET SALE PRICE PER SF



# Sales Past 12 Months

Arlington/Mansfield Office

Sale Comparables

55

Avg. Cap Rate

7.4%

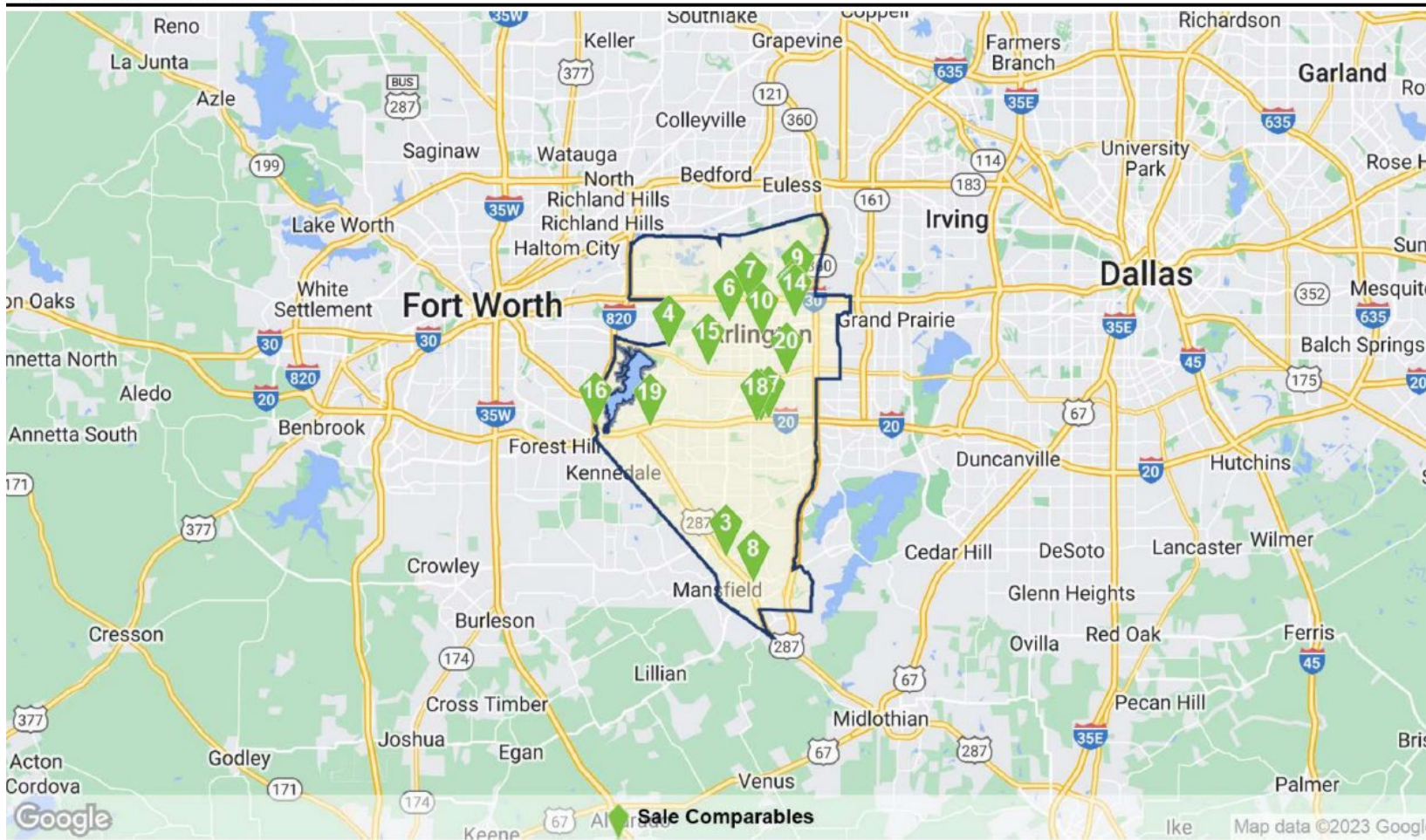
Avg. Price/SF

\$295

Avg. Vacancy At Sale

10.5%

## SALE COMPARABLE LOCATIONS





## Industry Spotlight

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# Medical Equipment and Supplies Manufacturing

Dallas-Fort Worth-Arlington, TX MSA

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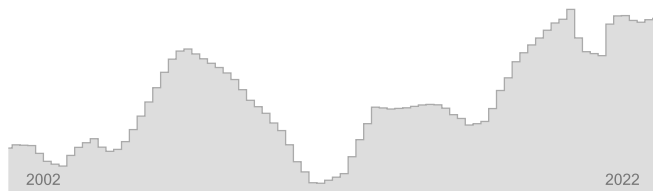
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# Medical Equipment and Supplies Manufacturing Dallas-Fort Worth-Arlington, TX MSA – 2022Q4

## EMPLOYMENT



**6,257**

Regional employment / **338,730** in the nation

## WAGES

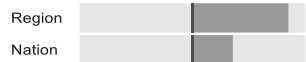


**\$73,211**

Avg Wages per Worker / **\$86,255** in the nation

**1.9%** ↑

Avg Ann % Change Last 10 Years / **+0.8%** in the US



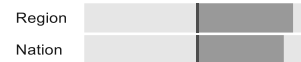
**0.2%**

% of Total Employment / **0.2%** in the US

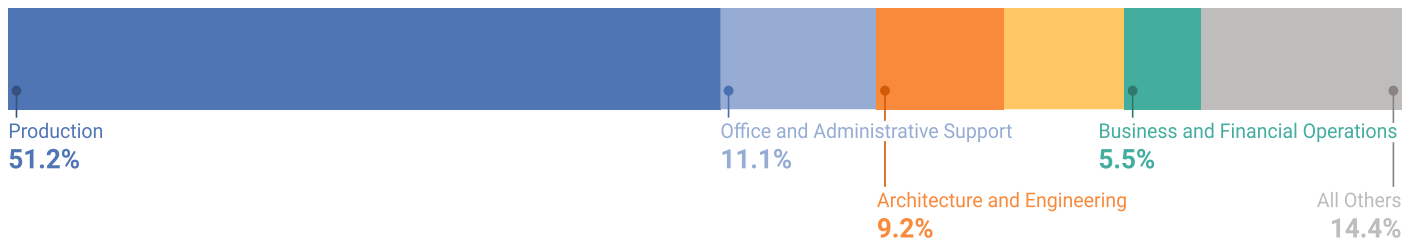


**3.3%** ↑

Avg Ann % Change Last 10 Years / **+3.0%** in the US

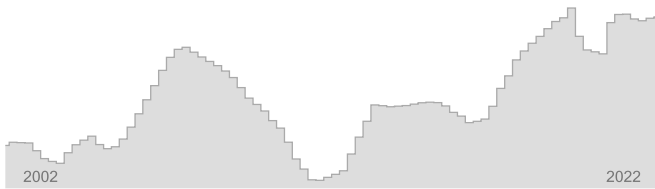


## TOP OCCUPATION GROUPS

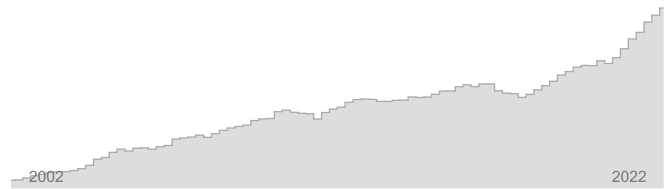



# Industry Snapshot


## EMPLOYMENT



## WAGES

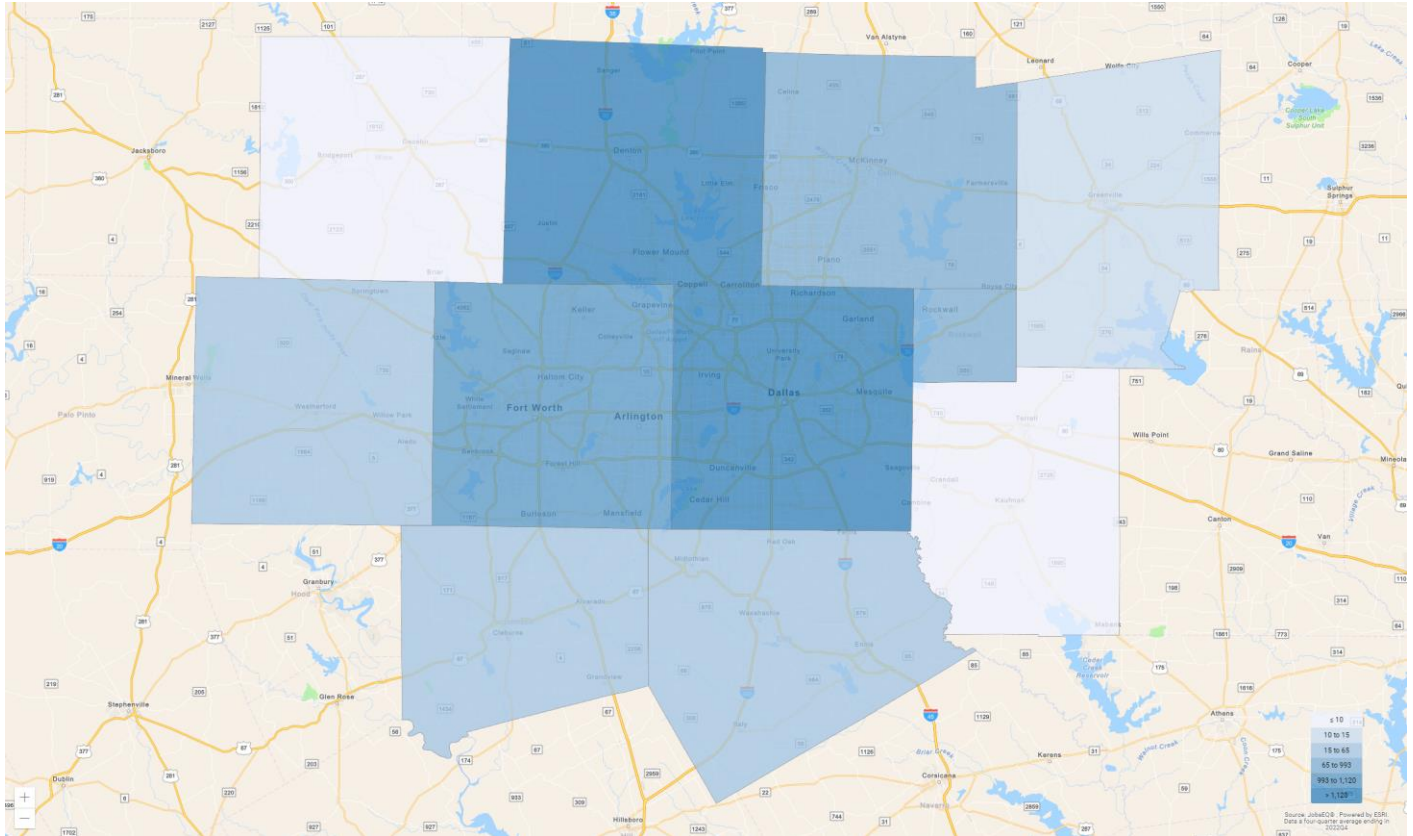


4-Digit Industry	Empl	Avg Ann Wages	LQ	5yr History	Annual Demand	Forecast Ann Growth
<b>Medical Equipment and Supplies Manufacturing</b>	<b>6,257</b>	<b>\$73,211</b>	<b>0.72</b>		<b>785</b>	<b>1.7%</b>

 Employment is one of the broadest and most timely measures of a region's economy. Fluctuations in the number of jobs shed light on the health of an industry. A growing employment base creates more opportunities for regional residents and helps a region grow its population.

 Since wages and salaries generally compose the majority of a household's income, the annual average wages of a region affect its average household income, housing market, quality of life, and other socioeconomic indicators.

# Geographic Distribution



Region	Empl	Region	Empl
Dallas County, Texas	3,456	Ellis County, Texas	43
Denton County, Texas	1,120	Parker County, Texas	16
Tarrant County, Texas	994	Johnson County, Texas	15
Collin County, Texas	528	Hunt County, Texas	11
Rockwall County, Texas	65	Kaufman County, Texas	8
		All Others	1

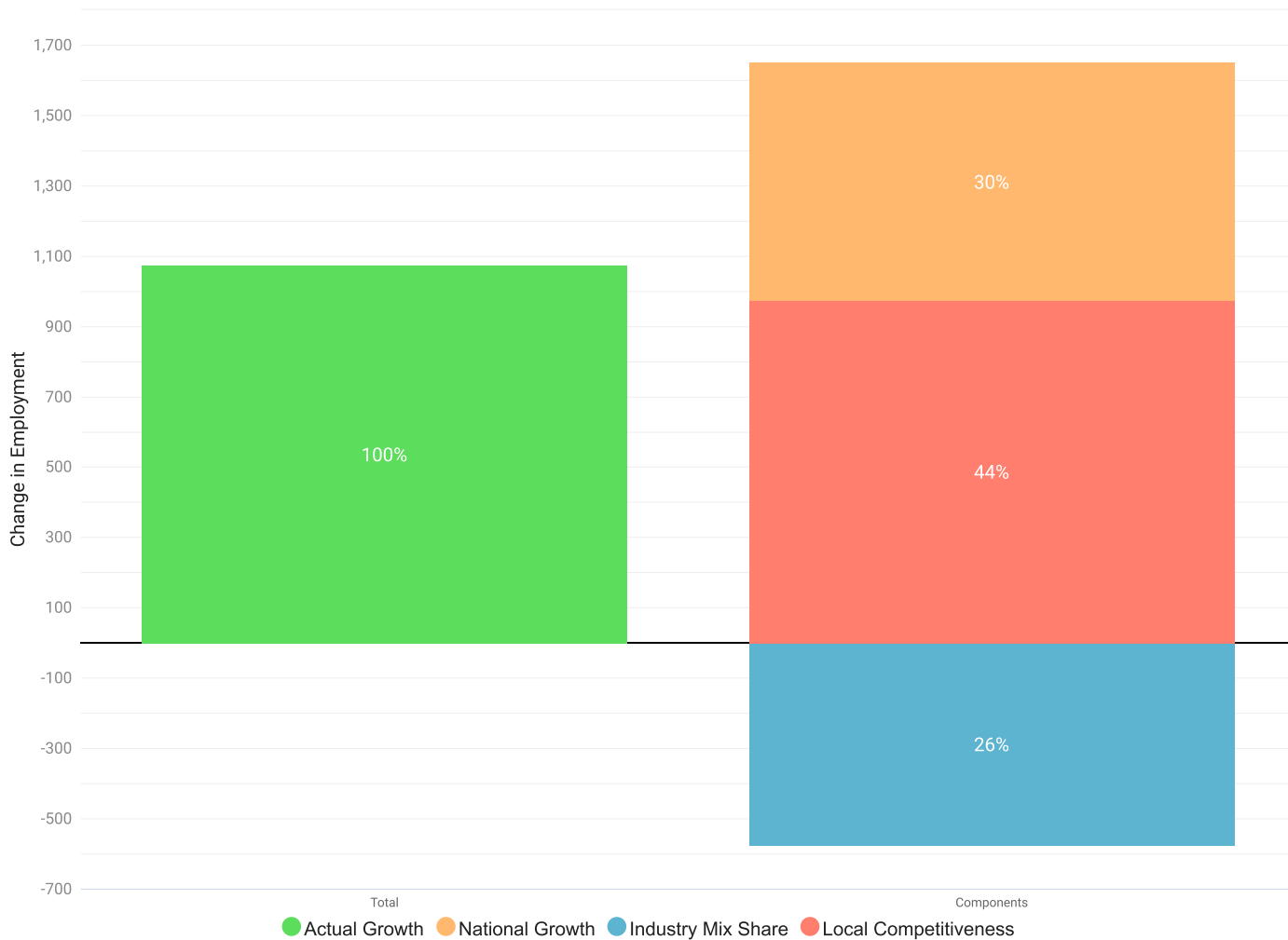
Source: JobsEQ®

 The geographic distribution of industry employment by place of work illustrates the impact on labor force demand and commuting patterns.



# Drivers of Employment Growth

Over the ten years ending 2022, employment in Medical Equipment and Supplies Manufacturing for the Dallas-Fort Worth-Arlington, TX MSA added 1,075 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a gain of 975 jobs—meaning this industry was more competitive than its national counterpart during this period.

Drivers of Employment Growth for Dallas-Fort Worth-Arlington, TX MSA



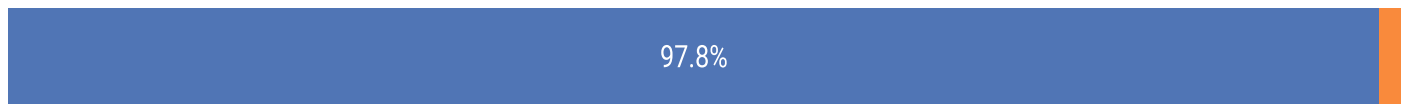
Source: JobsEQ®, Data as of 2022Q4



-  Shift-share analysis sheds light on the factors that drive regional employment growth in an industry. A positive change in local competitiveness indicates advantages that may be due to factors such as superior technology, management, and labor pool, etc.
-  National growth is due to the overall growth or contraction in the national economy. Industry mix share is the growth attributable to the specific industries examined (based on national industry growth patterns and the industry mix of the region).

# Employment Distribution by Type

The table below shows the employment mix by ownership type for Medical Equipment and Supplies Manufacturing for the Dallas-Fort Worth-Arlington, TX MSA. Four of these ownership types — federal, state, and local government and the private sector — together constitute “Covered Employment” (employment covered by the Unemployment Insurance programs of the United States and reported via the Quarterly Census of Employment and Wages).

“Self-Employment” refers to unincorporated self-employment and represents workers whose primary job is self-employment (that is, these data do not include workers whose primary job is a wage-and-salary position that is supplemented with self-employment).



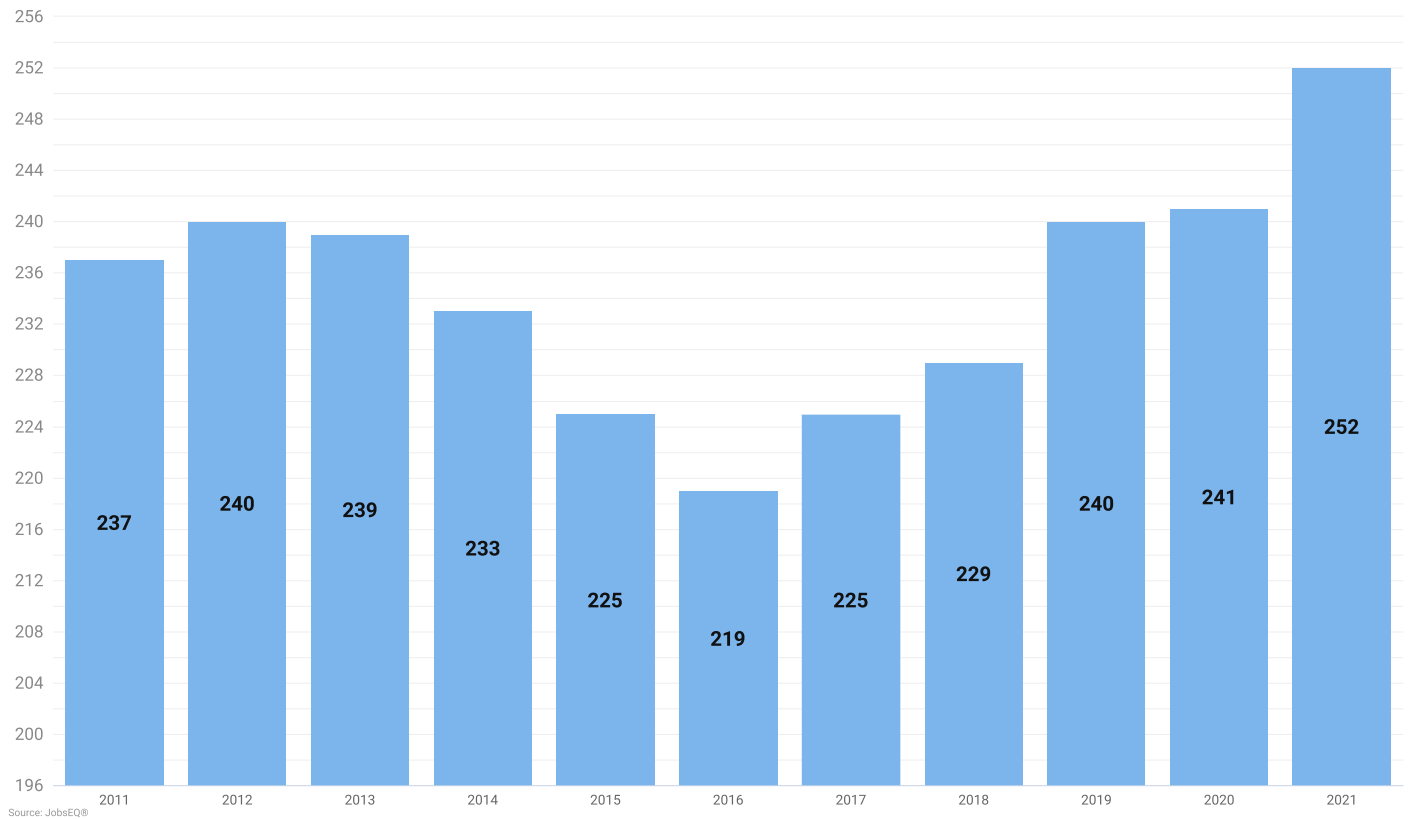
	<b>Empl</b>	<b>%</b>
 Private	6,121	97.8%
 Self-Employment	136	2.2%


Source: JobsEQ®

 Strong entrepreneurial activity is indicative of growing industries. Using self-employment as a proxy for entrepreneurs, a higher share of self-employed individuals within a regional industry points to future growth.

# Establishments

In 2021, there were 252 Medical Equipment and Supplies Manufacturing establishments in the Dallas-Fort Worth-Arlington, TX MSA (per covered employment establishment counts), an increase from 237 establishments ten years earlier in 2011.

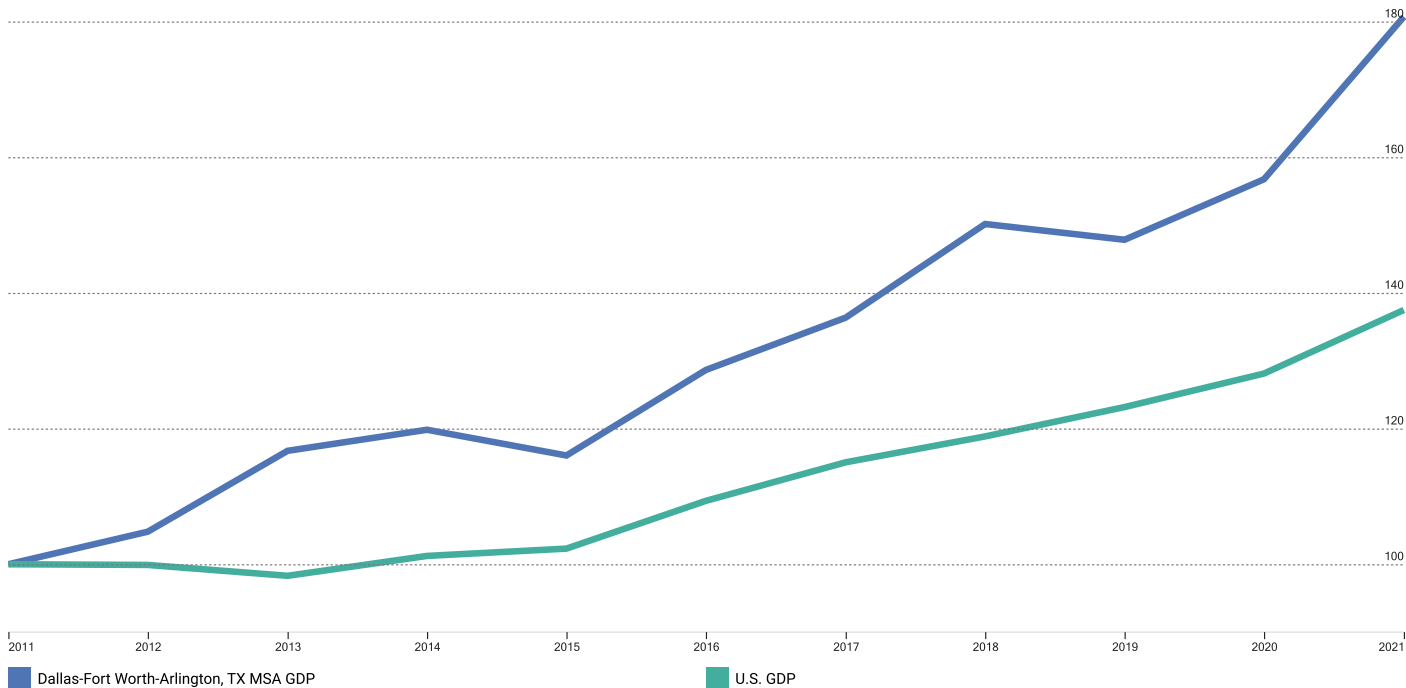


 New business formations are an important source of job creation in a regional economy, spurring innovation and competition, and driving productivity growth. Establishment data can provide an indicator of growth in businesses by counting each single location (such as a factory or a store) where business activity takes place, and with at least one employee.

# GDP & Productivity

In 2021, Medical Equipment and Supplies Manufacturing produced \$0.9 billion in GDP for the Dallas-Fort Worth-Arlington, TX MSA.

GDP: Indexed 2011 = 100



## 0.1 %

Industry Share of Total GDP /  
**0.3 %** in the nation



## 6.1 % ↑

Avg Ann % Change Last 10 Yrs /  
**3.2 %** in the nation



## \$313k

Output per Worker /  
**\$375k** in the nation

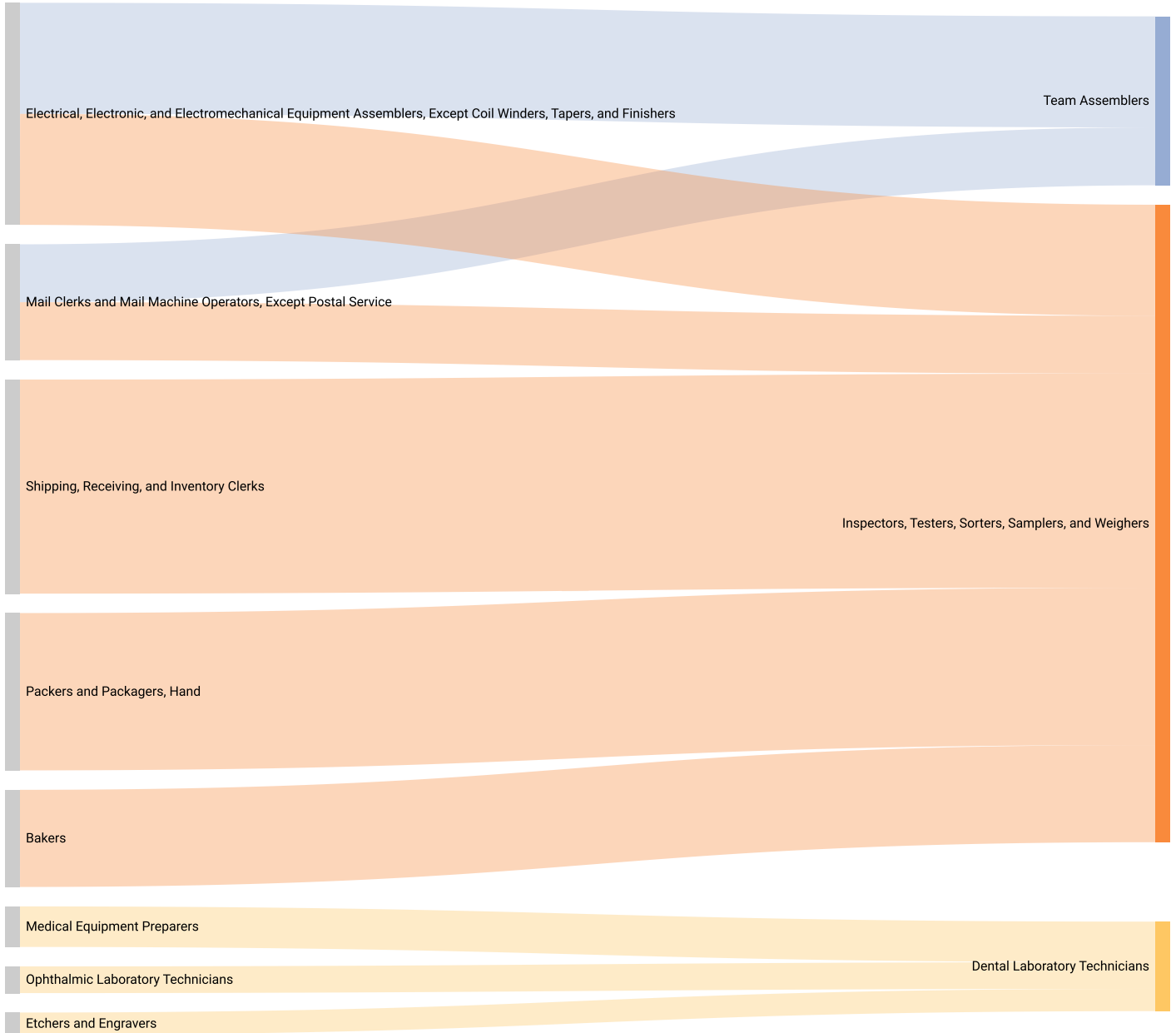



💡 Gross domestic product (GDP) is the most comprehensive measure of regional economic activity, and an industry's contribution to GDP is an important indicator of regional industry strength. It is a measure of total value-added to a regional economy in the form of labor income, proprietor's income, and business profits, among others. GDP values shown on this page are nominal GDP data.

💡 Growth in productivity (output per worker) leads to increases in wealth and higher average standards of living in a region.



# Sector Strategy Pathways





 The graphics on this page illustrate relationships and potential movement (from left to right) between occupations that share similar skill sets. Developing career pathways as a strategy promotes industry employment growth and workforce engagement.

# Postsecondary Programs Linked to Medical Equipment and Supplies Manufacturing

Program	Awards
<b>Collin County Community College District</b>	
Heating, Ventilation, Air Conditioning and Refrigeration Engineering Technology/Technician	168
<b>Lincoln College of Technology-Grand Prairie</b>	
Computer Numerically Controlled (CNC) Machinist Technology/CNC Machinist	70
<b>Southern Methodist University</b>	
Engineering/Industrial Management	49
<b>The University of Texas at Arlington</b>	
Bioengineering and Biomedical Engineering	114
Industrial Engineering	123
Mechanical Engineering	284
<b>The University of Texas at Dallas</b>	
Bioengineering and Biomedical Engineering	154
Mechanical Engineering	293
Systems Engineering	57
<b>University of Texas Southwestern Medical Center</b>	
Orthotist/Prosthetist	14

Source: [JobsEQ®](#)

-  The number of graduates from postsecondary programs in the region identifies the pipeline of future workers as well as the training capacity to support industry demand.
-  Among postsecondary programs at schools located in the Dallas-Fort Worth-Arlington, TX MSA, the sampling above identifies those most linked to occupations relevant to Medical Equipment and Supplies Manufacturing. For a complete list see JobsEQ®, <http://www.chmuraecon.com/jobseq>

# Data Notes

- Industry employment and wages (including total regional employment and wages) are as of 2022Q4 and are based upon BLS QCEW data, imputed by Chmura where necessary, and supplemented by additional sources including Census ZBP data. Employment forecasts are modeled by Chmura and are consistent with BLS national-level 10-year forecasts.
- Occupation employment is as of 2022Q4 and is based on industry employment and local staffing patterns calculated by Chmura and utilizing BLS OEWS data. Wages by occupation are as of 2022, utilizing BLS OEWS data and imputed by Chmura.
- GDP is derived from BEA data and imputations by Chmura. Productivity (output per worker) is calculated by Chmura using industry employment and wages as well as GDP and BLS output data. Supply chain modeling including purchases by industry are developed by Chmura.
- Postsecondary awards are per the NCES and are for the 2020-2021 academic year.
- Establishment counts are per the BLS QCEW data.
- Figures may not sum due to rounding.

# Region Definition

**Dallas-Fort Worth-Arlington, TX MSA is defined as the following counties:**

Collin County, Texas

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Dallas County, Texas

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Denton County, Texas

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Ellis County, Texas

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Hunt County, Texas

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Johnson County, Texas

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Kaufman County, Texas

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Parker County, Texas

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Rockwall County, Texas

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Tarrant County, Texas

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Wise County, Texas

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# FAQ

## **What is (LQ) location quotient?**

Location quotient is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

## **What is annual demand?**

Annual demand is a of the sum of the annual projected growth demand and separation demand. Separation demand is the number of jobs required due to separations—labor force exits (including retirements) and turnover resulting from workers moving from one occupation into another. Note that separation demand does not include all turnover—it does not include when workers stay in the same occupation but switch employers. Growth demand is the increase or decrease of jobs expected due to expansion or contraction of the overall number of jobs.

## **What is the difference between industry wages and occupation wages?**

Industry wages and occupation wages are estimated via separate data sets, often the time periods being reported do not align, and wages are defined slightly differently in the two systems (for example, certain bonuses are included in the industry wages but not the occupation wages). It is therefore common that estimates of the average industry wages and average occupation wages in a region do not match exactly.