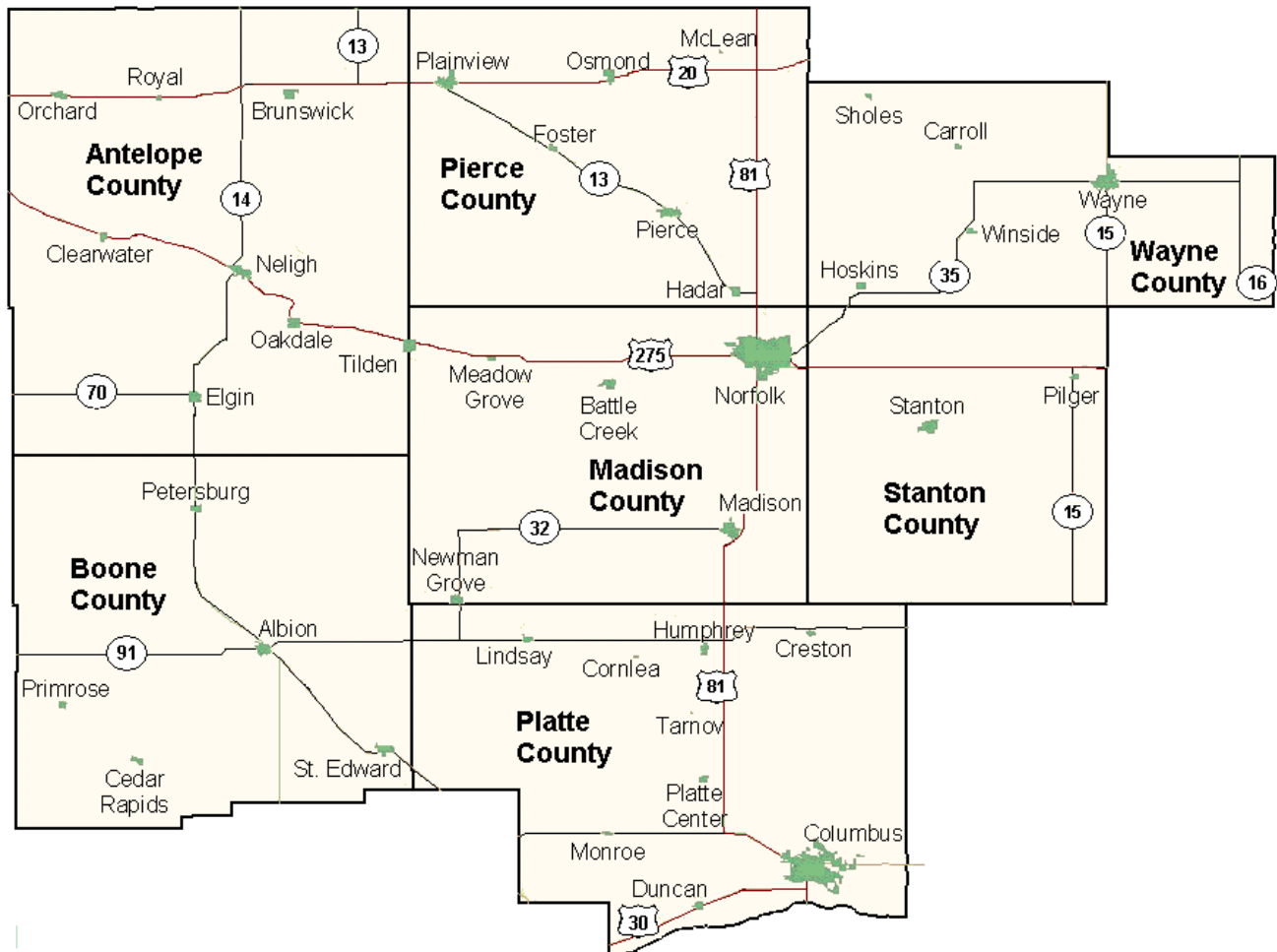


# Elkhorn Valley Labor Basin Labor Availability Analysis

Antelope, Boone, Madison, Pierce, Platte,  
Stanton, and Wayne Counties, Nebraska



Prepared For  
**Elkhorn Valley Economic Development Council**  
Prepared By  
**The Docking Institute of Public Affairs**

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## Elkhorn Valley Labor Basin Labor Availability Analysis Executive Summary

The Elkhorn Valley Labor Basin includes Antelope, Boone, Madison, Pierce, Platte, Stanton, and Wayne Counties in Nebraska. The purpose of this report is to assess the “Available Labor Pool” in this labor basin. The “Available Labor Pool” represents those who indicate that they are looking for employment or would consider changing their jobs for the right employment opportunity.

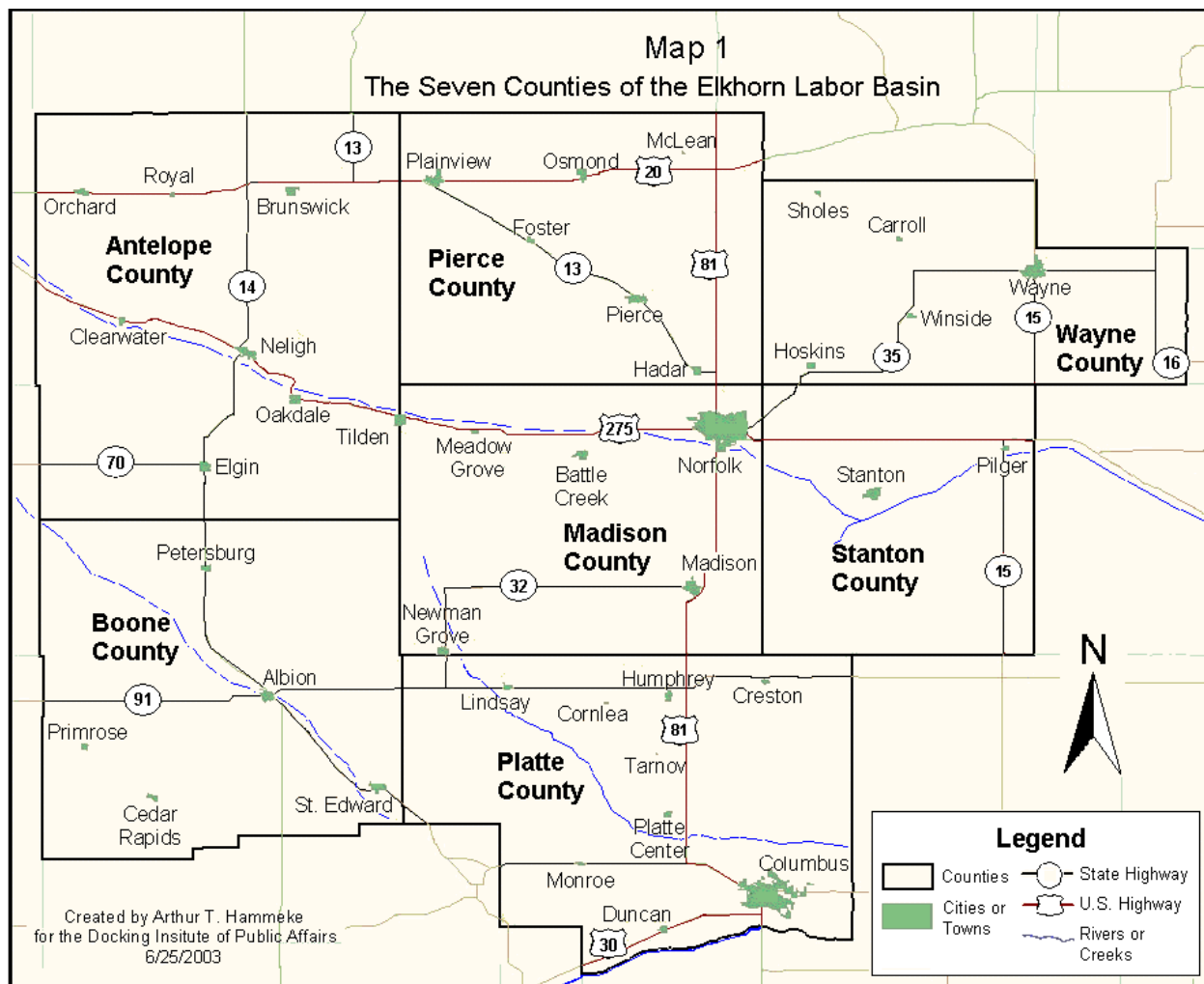
The Docking Institute’s independent analysis of this labor basin shows that:

- The population of the Elkhorn Valley Labor Basin is estimated to be 104,231. Almost 24% of the total population (or 24,914 individuals) is considered to be part of the Available Labor Pool.
- Of the Available Labor Pool, it is estimated that 1,445 non-working and 4,225 working individuals are **looking** for new employment, while 2,984 non-working and 16,260 working individuals would **consider** new and/or different employment for the right opportunities.
- About 68% of the Available Labor Pool has at least some college experience and nearly the entire Pool (96.1%) has at least a high school diploma. The average age for members of the Available Labor Pool is 43 years.
- About 16,411 members (or almost 65%) of the Available Labor Pool indicate that they have strong customer service and/or sales skills, while almost 65% suggest they have strong skills in the areas of teaching and/or training. About 59% report strong writing skills.
- Almost 27% of the members (or 6,634 individuals) of the Available Labor Pool will commute up to 45 minutes, one way, for an employment opportunity. About 75% (or 18,604 individuals) will commute up to 30 minutes for employment, and a 96% (or 23,904 individuals) will travel up to 15 minutes for employment.
- A substantial majority (85% or about 21,114 members) of the Available Labor Pool indicated that they are “willing work outside of their primary field of employment for a new or different employment opportunity.”
- About 13,175 individuals (or 53% of the available labor) are interested in a new employment if offered \$14.00 an hour. About 11,050 people (or 44%) are interested in a new job at \$12.00 an hour, 8,480 (or 34%) are interested at \$10.00 an hour, and about 3,765 (or 15%) are interested at \$8.00 an hour.
- 9,435 (or 46%) of the **working** members of the Available Labor Pool consider themselves underutilized. More than 75% of the underutilized workers have some college experience, and most (82%) of the underutilized workers are willing to change jobs to address their underutilized status.

## Elkhorn Valley Labor Basin Labor Availability Analysis

The Elkhorn Valley Labor Basin encompasses portions of seven counties in north central Nebraska (see Map 1 below). The criterion used to include a county in this labor basin is whether it has a significant border adjacent to Madison within which Norfolk, the center of the Elkhorn Valley labor basin, is located and/or whether the county contains communities that are sufficiently isolated (but with adequate transportation access) to suggest their residents would commute to the Norfolk area for an employment opportunity.

The Elkhorn Valley Labor Basin has a total population of approximately 104,231, and a Civilian Labor Force (CLF) of 56,798. There is an unemployment rate of 3.56%, but there is an ample supply of available labor to support a major new employer. The Docking Institute's independent analysis of this labor basin shows that there are 5,670 workers and non-workers (9% of the CLF) who are actively looking for new or different employment, and 19,244 (33% of the CLF) who would consider new or different employment for the right opportunity.



## The Civilian Labor Force

Traditional methods of assessing the dynamics of the labor force have concentrated on what the Bureau of Labor Statistics (BLS) calls the Civilian Labor Force (CLF). The CLF represents “all civilians 16 years of age and over classified as employed or unemployed,” with unemployed civilians defined as civilians available for work and who had “made specific efforts to find employment” in the previous four weeks. As mentioned previously, the CLF for the Elkhorn Valley Labor Basin is 56,798 workers.

While a review of CLF statistics represents the starting point for understanding the labor force in and around the Elkhorn Valley area, there are some limitations associated with these statistics. These limitations occur because the CLF *excludes* individuals who may be willing and able to be gainfully employed but have not made specific efforts to find employment in the last four weeks. These individuals may include full-time students who do not work, homemakers, the unemployed who are no longer seeking employment, military personnel who may be leaving military employment in the near future, and retired individuals who may be willing to work but have not been looking for work recently.

In addition, most new employers draw their workforce from those who are presently employed, not those who are unemployed. As such, Census-based and BLS data (such as the CLF) does not address the possibility of workers moving from one industry to another in search of other employment opportunities. Relying solely upon CLF-type statistics can lead communities to be stereotyped as providing only certain types of workers to potential employers. For example, a labor basin might be classified as able to provide blue-collar employment only, while, in reality, the quantity and quality of workers might be sufficient to support the needs of non-professional service sector/information-based employers. In sum, aggregate CLF-type data simply cannot reveal detailed aspects of a labor pool that might be available for new employment opportunities.

## Available Labor Pool

An alternative to the CLF is the “Available Labor Pool<sup>1</sup>.” The Available Labor Pool is composed of workers categorized as either 1) currently employed (full- or part-time) *and* seeking other employment, 2) currently retired and/or non-working in any manner *and* seeking employment, or 3) currently employed and not seeking a new job, *but* willing to consider different employment for the “right opportunity.”

There are two key differences between the Civilian Labor Force and the Available Labor Pool. First, the Available Labor Pool methodology expands the pool of potential workers by including workers excluded from the CLF<sup>2</sup>. Secondly, the number of potential workers is then

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<sup>1</sup> The Available Labor Pool includes potential workers excluded from the CLF (such as full-time students willing to take a job, homemakers who have not yet sought employment, military personnel who may be leaving military employment in the near future, and retired individuals who may be willing and able to be gainfully employed).

<sup>2</sup> The number that is added to the Civilian Labor Force is derived by taking from the survey the total number of full-time students, homemakers, military, retirees, and long-term unemployed, who state that they are seeking or available for employment and are within a reasonable commute distance to the center of the labor basin, and dividing this number by the total number of respondents. This quotient is then multiplied by the total number of people in the labor basin who are 18 to 65 years old.

*restricted* to those workers who indicate they are looking for or are available for new employment. The advantage of this methodology is that it allows researchers to examine those members of the labor pool that have a propensity to consider a job opportunity given their employment expectations and a realistic potential to take a new job. Even with these restrictions, it should be noted that in practice, not all members of the Available Labor Pool would apply for a new job opportunity. However, the Available Labor Pool figure for a labor basin represents to planners and potential employers a much more solid number than Civilian Labor Force data and unemployment statistics upon which to base conclusions about potential labor. The Available Labor Pool for the Elkhorn Valley Labor Basin includes 24,914 individuals. This represents a substantial number of workers and potential workers for employers to draw upon in the Elkhorn Valley Labor Basin.

### **The Elkhorn Valley Labor Basin's Available Labor Pool**

This section assesses the characteristics of the Available Labor Pool in the Elkhorn Valley Labor Basin by answering the following questions: 1) What proportion of the labor force—employed, unemployed, homemaker, military, student, and retired—would seriously consider applying for a new employment opportunity? 2) What skills do those who would consider a new employment opportunity have? 3) What types of considerations (pay, benefits, commuting distance) shape their decision-making? 4) What is the quality of those who would seriously consider a new employment opportunity? 5) What proportion of those workers among the available labor pool are considered “underutilized “ workers? and 6) What are some of the characteristics of those underutilized workers?

The percent of the study area population in the Available Labor Pool is derived from a telephone survey of 1,102 employed (650) and non-employed (452) adults living in the Elkhorn Valley Labor Basin. When all 1,102 respondents are included in the analysis, the survey findings have a margin of error of +/- 2.95%. The margin of error for subgroups is higher. Most of these analyses are based on a subgroup of respondents who were determined to be in the Available Labor Pool (see definition above). For these 449 respondents, the survey has a margin of error of +/- 4.6%. Please see the Methods section of this report for more details about the survey methodology used in this study.

Figure 1 (next page) shows that there is an Available Labor Pool in the Elkhorn Valley Labor Basin of 24,914<sup>3</sup>. It is estimated that 1,445 non-employed<sup>4</sup> and 4,225 employed individuals are **currently looking** for new or different employment, while 2,984 non-employed individuals and 16,260 employed individuals would consider changing employment for the right opportunities.

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<sup>3</sup> The Available Labor Pool includes individuals that indicate that they are looking for or are available for full-time employment, and individuals that indicate that they are available for both full-time and part-time employment.

<sup>4</sup> The terms “non-employed” and “non-working” refer not only to official unemployed members of the Civilian Labor Force. These terms also include any non-employed/non-working full-time students, homemakers, retirees, and disabled individuals.

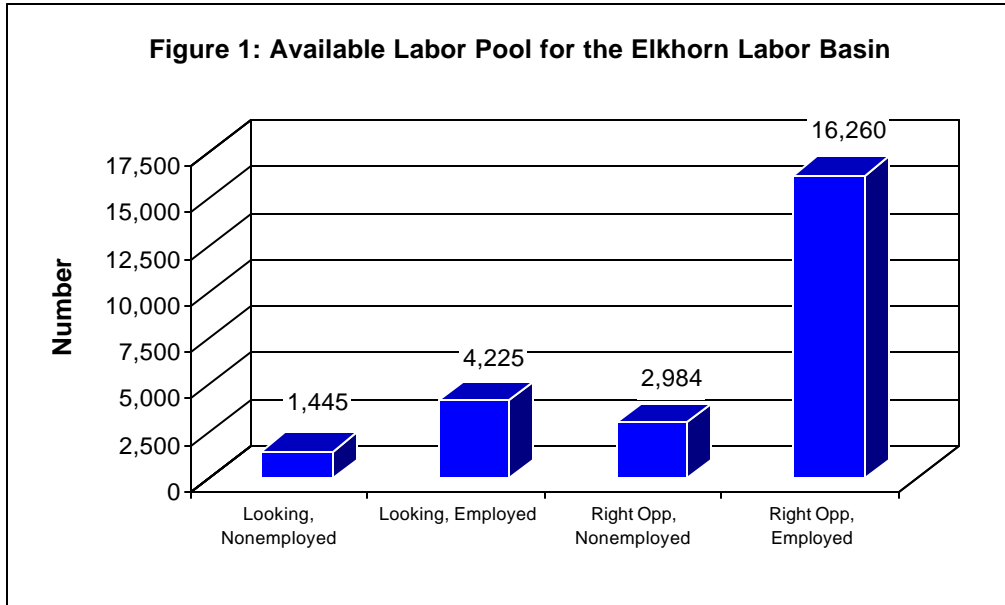


Table 1 shows the gender, age statistics, and educational levels of the 24,914-member Available Labor Pool. About 49% are women, and the average age is 43. The educational levels of the Available Labor Pool are high. Almost all (96.1%) have at least a high school diploma, more than two-thirds (67.9%) have at least some college education, and a quarter (25.4%) have at least a Bachelors Degree.

**Table 1: Age, Gender, and Education Level of Available Pool**

|                                     |             |         |              |
|-------------------------------------|-------------|---------|--------------|
| Age                                 |             |         |              |
|                                     | Age in 2003 |         |              |
| Average                             |             | 43      |              |
| Median                              |             | 44      |              |
| Gender                              |             |         |              |
|                                     | Number      | Percent |              |
| Female                              | 12,164      | 48.8    |              |
| Male                                | 12,750      | 51.2    |              |
| Total                               | 24,914      | 100.0   |              |
| Highest Level of Education Achieved |             |         |              |
|                                     | Number      | Percent | Cum. Percent |
| Doctoral Degree                     | 255         | 1.0     | 1.0          |
| Masters Degree                      | 1,446       | 5.8     | 6.8          |
| Bachelors Degree                    | 4,623       | 18.6    | 25.4         |
| Associates Degree                   | 3,299       | 13.2    | 38.6         |
| Some College                        | 7,287       | 29.2    | 67.9         |
| High School Diploma Only            | 7,020       | 28.2    | 96.1         |
| Less HS Diploma                     | 984         | 3.9     | 100.0        |
| Total                               | 24,914      | 100.0   |              |

Table 2 shows the various occupational categories of the 24,914 members of the Available Labor Pool. Traditional blue-collar occupations represent about 38% of the Available Labor Pool, including 3,856 general laborers, 1,682 farm workers, and 1,695 factory workers and heavy equipment operators. Traditional service-related and “pink-” and “white-collar” occupations represent about 44% of the Available Labor Pool, including 2,255 customer service/clerical workers and 3,071 managers and sales operatives.

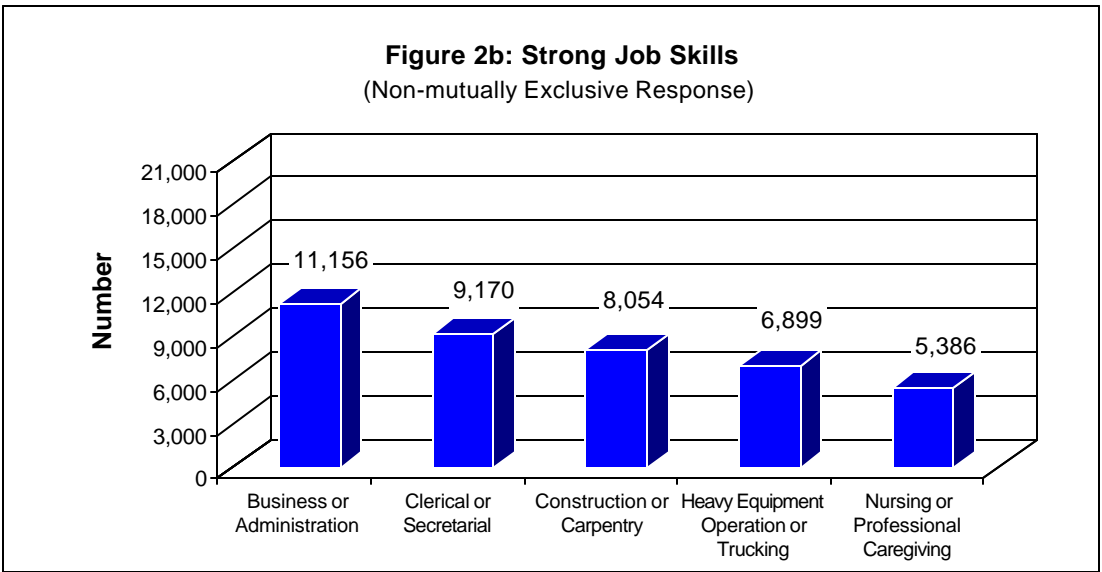
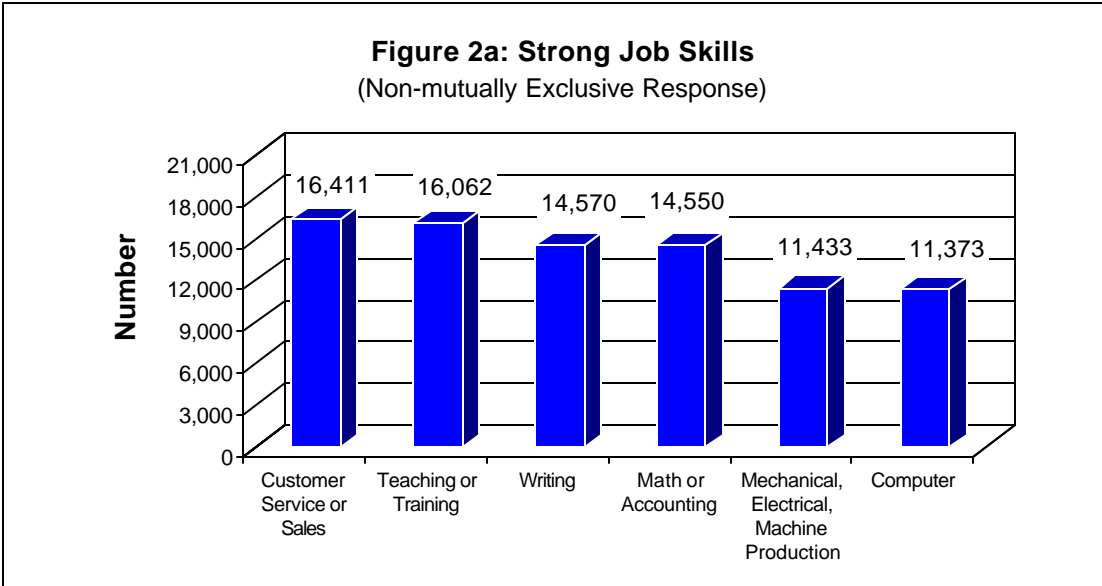
**Table 2: Occupation of Available Labor**

|                            | Number | Percent |
|----------------------------|--------|---------|
| General Labor              | 3,856  | 15.5    |
| Farm/Ranch Labor           | 1,682  | 6.7     |
| Factory Worker/HEO         | 1,695  | 6.8     |
| Technician/Mechanic        | 1,294  | 5.2     |
| Gov't Service/Other BC     | 992    | 4.0     |
| Customer Service/Clerical  | 2,255  | 9.0     |
| Social Service/Para-Prof.  | 2,685  | 10.8    |
| Management/Sales           | 3,071  | 12.3    |
| Executives/Professionals   | 1,854  | 7.4     |
| Writer/Researcher/Other WC | 1,102  | 4.4     |
| Hmaker/Student/Unemp       | 2,020  | 8.1     |
| Retired/Disabled           | 2,410  | 9.7     |
| Total                      | 24,914 | 100.0   |

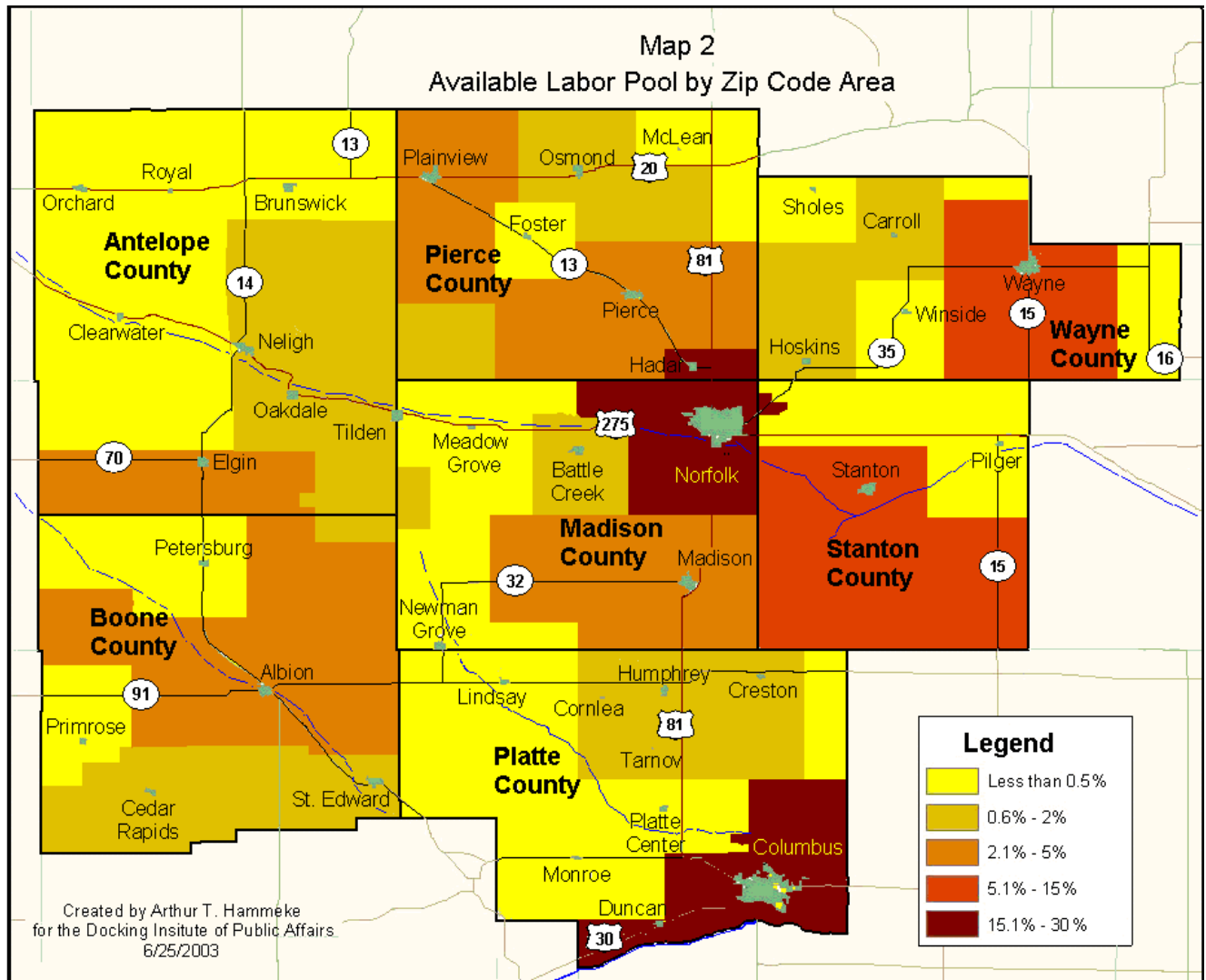
Table 3 and Figures 2a and 2b (on the next page) show that almost two-thirds (65.9% or 16,411 individuals) of the members of the Available Labor Pool indicate that they have strong skills in the areas of customer service or sales. Almost 65% suggest that they have strong teaching or training skills, about 59% report strong writing skills, and 58% also suggest strong math or accounting skills. Fewer individuals feel that they have strong construction, heavy equipment operation, or nursing skills.

**Table 3: Specific Strong Job Skills**

|  | Number | Percent |
|--|--------|---------|
| Customer Service or Sales                  | 16,411 | 65.9    |
| Teaching or Training                       | 16,062 | 64.5    |
| Writing                                    | 14,570 | 58.5    |
| Math or Accounting                         | 14,550 | 58.4    |
| Mechanical, Electrical, Machine Production | 11,433 | 45.9    |
| Computer                                   | 11,373 | 45.6    |
| Business or Administration                 | 11,156 | 44.8    |
| Clerical or Secretarial                    | 9,170  | 36.8    |
| Construction or Carpentry                  | 8,054  | 32.3    |
| Heavy Equipment Operation or Trucking      | 6,899  | 27.7    |
| Nursing or Professional Caregiving         | 5,386  | 21.6    |



Zip codes of respondents were used to map the Available Labor Pool. Map 2 shows how each zip code in the basin compares to all other zip codes in terms of percent of total available workers for a job in the Elkhorn Valley Labor Basin. Each zip code is grouped into one of five categories specified in the key. Not surprisingly, the zip codes with the highest levels of available labor within the Elkhorn Valley Labor Basin are located around Norfolk and Columbus, the two largest cities in the labor basin. However, a substantial percentage of members of the Available Labor Pool also reside in Stanton and Wayne Counties.



## Considerations for Employment

An important consideration for many employers looking to locate or expand operations is whether workers are willing to pursue new employment opportunities. Some workers may be available for a new employment, but are unwilling to switch from their current job to a different type of position. If there are a large percentage of those unwilling to change their jobs, it limits the type of employers who can enter the labor basin. This does not seem to be the case in the Elkhorn Valley Labor Basin, however. Figure 3 indicates that 21,114 members of the Available Labor Pool (or about 85% working and non-working individuals) are willing to accept positions outside of their primary fields of employment (for example, low-skill blue collar employment to low-skill service sector employment).

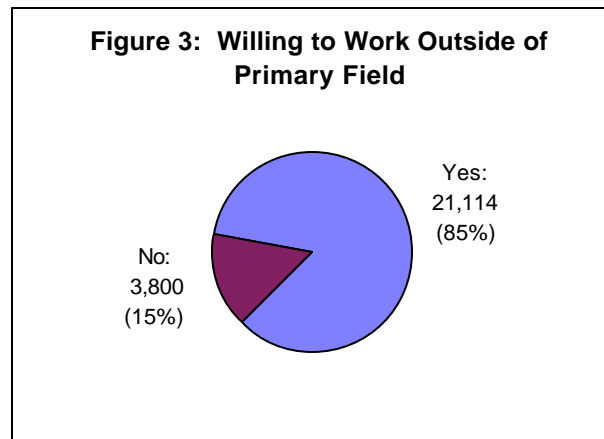


Table 4 and Figure 4 (next page) suggest that the Available Labor Pool in the Elkhorn Valley Labor Basin is open to commuting. Almost 96% of the workers in the Available Labor Pool will commute up to 15 minutes, one way, for an employment opportunity, and almost three-fourths (74.7% or 18,604 individuals) will commute up to 30 minutes for employment.

**Table 4: Time Available Will Commute**

|                      | Number | Cumulative Percent |
|----------------------|--------|--------------------|
| More than 60 Minutes | 127    | 0.0                |
| Up to 60 Minutes     | 4,024  | 16.2               |
| Up to 55 Minutes     | 4,090  | 16.4               |
| Up to 50 Minutes     | 4,304  | 17.3               |
| Up to 45 Minutes     | 6,634  | 26.6               |
| Up to 40 Minutes     | 7,519  | 30.2               |
| Up to 35 Minutes     | 7,882  | 31.6               |
| Up to 30 Minutes     | 18,604 | 74.7               |
| Up to 25 Minutes     | 19,157 | 76.9               |
| Up to 20 Minutes     | 21,952 | 88.1               |
| Up to 15 Minutes     | 23,904 | 95.9               |
| Up to 10 Minutes     | 24,764 | 99.4               |
| Up to 5 Minutes      | 24,914 | 100.0              |

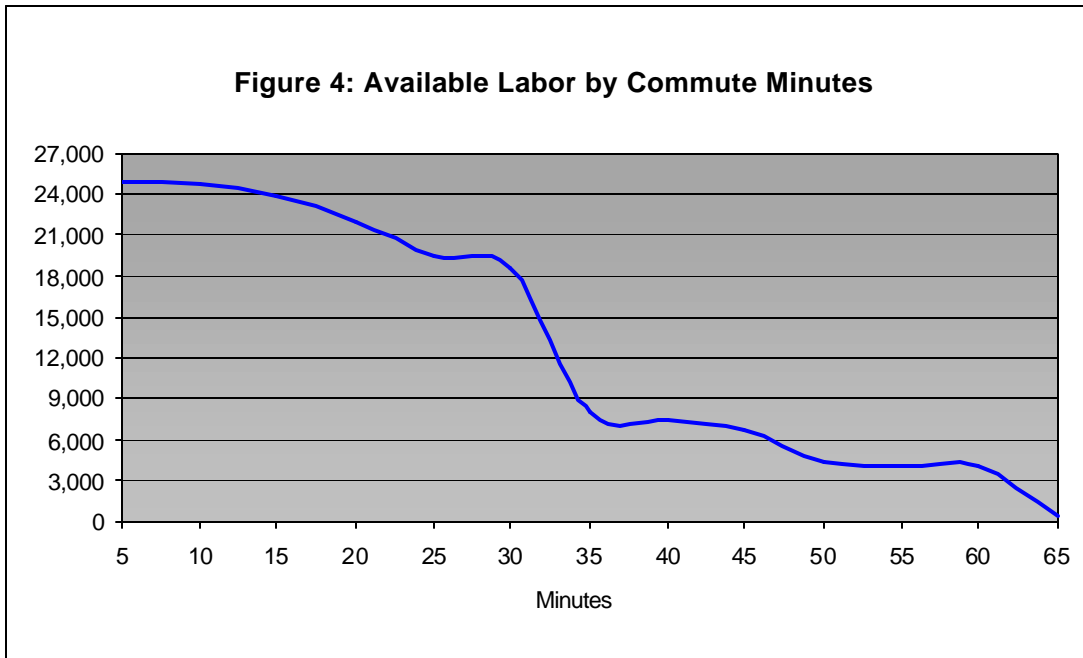


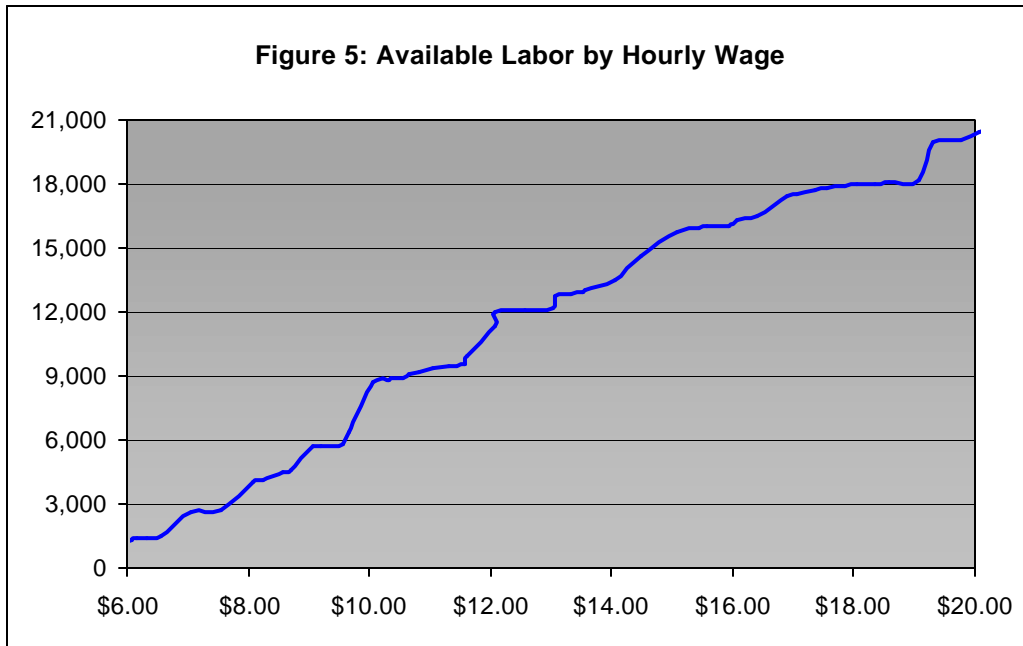
Table 5<sup>5</sup> shows various benefits affecting the decisions of workers to take a different job and the decisions of potential workers to take a new job. The most important benefits are good health benefits, on-the-job training, and good retirement benefits (87.2%, 85.7%, and 85% respectively). These benefits are followed by good salary, good vacation benefits, and flexible hours (83%, 77.4%, and 67.6%, respectively). The high percentage of respondents desiring paid or on-the-job training is somewhat unusual compared to most other labor studies, suggesting a benefit that Elkhorn Valley employers might offer to attract employees.

**Table 5: Benefit Very Important In Decision to Change Employment**

|                              | Percent Responding "Yes" |
|------------------------------|--------------------------|
| Good Health Benefits         | 87.2                     |
| OJT or Paid Training         | 85.7                     |
| Good Retirement Benefits     | 85.0                     |
| Good Salary                  | 83.0                     |
| Good Vacation Benefits       | 77.4                     |
| Flexible Hours               | 67.6                     |
| Good Life Insurance Benefits | 60.1                     |
| Good Education Benefits      | 60.6                     |
| Work Closer to Home          | 51.4                     |
| Assistance with Childcare    | 25.9                     |
| Work in Different Community  | 28.6                     |

<sup>5</sup> The responses shown in Table 5 are **not** mutually exclusive (i.e., respondents could answer "yes" or "no" to more than one question).

Figure 5 shows the wage demands of the Available Labor Pool. About 13,175 people (or about 53% of the available labor) are interested in a new employment if offered \$14.00 an hour. About 11,050 people (or 44% of the available labor) are interested in a new job at \$12.00. Almost 8,480 people, or about 34%, are interested at \$10.00 an hour, and about 3,765 people (or about 15%) indicate an interest at \$8.00 an hour.

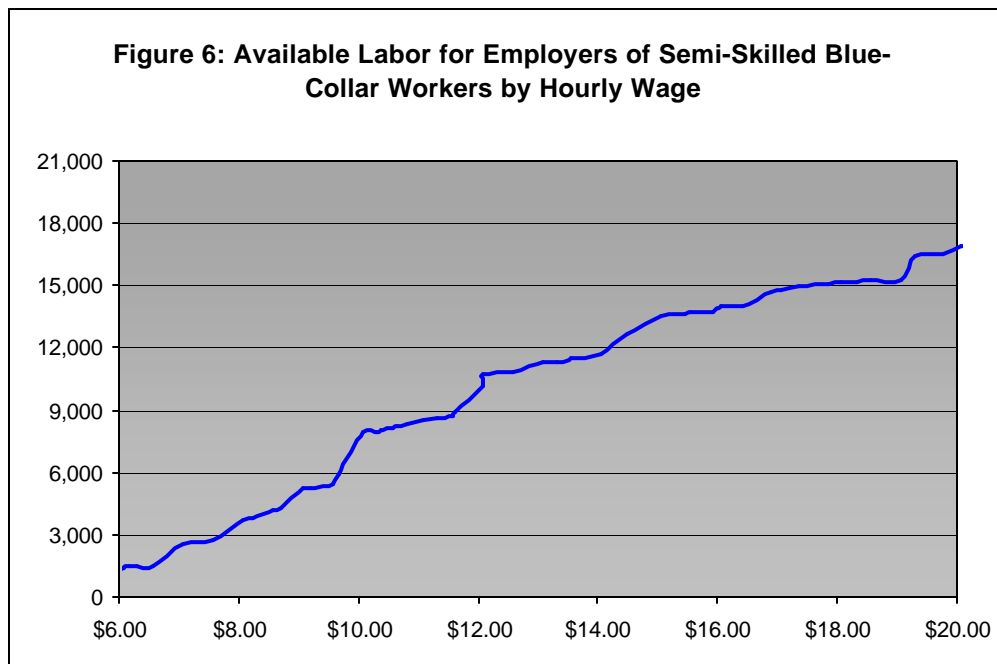


## Blue-Collar, Pink-Collar, and White-Collar Sector Scenarios

To present an even more refined picture regarding the number of workers that would seriously consider a new employment opportunity, a number of factors are considered. These factors include commute time, desired wages, and willingness to change job fields. Specifically, the following analyses *excludes* those members of the Available Labor Pool who:

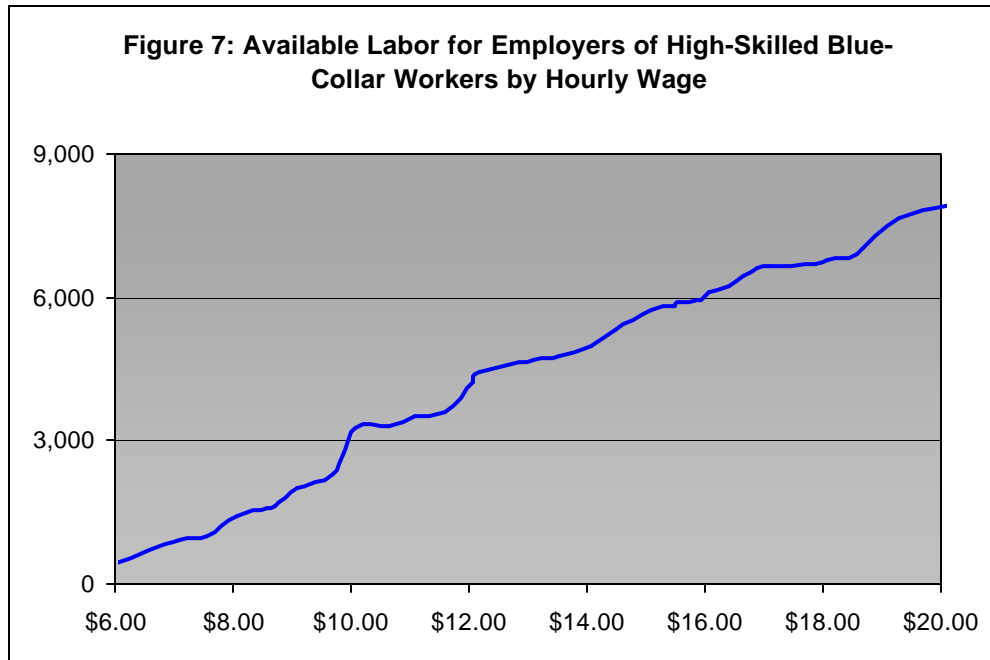
- Are unwilling to commute the necessary time from his/her community to the center of the labor basin.
- Have wage expectations exceeding \$20.00 an hour.
- Are unwilling to change their primary field of employment (for example: service sector pink-collar employment to semi-skilled blue-collar employment).

Given these exclusions, Figures 6 to 9 suggest the number of employees that employers of semi-skilled and skilled blue-collar workers, and semi-skilled (“pink-collar”) and skilled white-collar workers might find available at given wage levels. The available labor for an employer of semi-skilled blue-collar workers (see Figure 6<sup>6</sup> below) offering \$14.00 an hour is about 11,110 workers. At \$12.00 an hour the available labor is about 10,120 workers, at \$10.00 an hour the available labor is almost 7,325, and at \$8.00 the available labor is almost 3,125 people.



<sup>6</sup> In addition to the exclusions listed above, certain professional occupations are excluded from the data presented in **Figures 6 and 8**. These occupations include Doctors, Lawyers, Engineers, Professors, Machinists, Electricians and others that are highly skilled and are unlikely to transfer into lower-skilled Blue-Collar (manual labor) and Pink-Collar (service and support) occupations.

Figure 7<sup>7</sup> show that for employers of highly skilled blue-collar workers, about 6,650 individuals are available at a wage of \$18.00 per hour (or an annual salary of \$37,440). At \$16.00 per hour (\$33,280 annually) there are about 5,995 individuals available, at \$14.00 per hour (\$29,120 per year) there are about 4,865 individuals available, and at \$12.00 per hour (\$24,960 annually) there are about 4,290 available.



Figures 8 and 9 (both on the next page) show the available labor for semi-skilled service workers and highly skilled white-collar workers. The available labor for an employer of semi-skilled white-collar (often referred to as “Pink-Collar”) workers (see Figure 9) offering \$14.00 an hour is about 11,170 workers. At \$12.00 an hour the available labor is about 10,050 workers, at \$10.00 an hour the available labor is slightly more than 7,260, and at \$8.00 the available labor is about 3,080 people.

<sup>7</sup> In addition to the exclusions listed previously, it is assumed that the two groups of highly skilled workers presented in **Figures 7 and 9** will **not** be willing/able to transfer from one group to the other (i.e., from highly skilled white-collar professions to highly skilled blue-collar profession, and vice versa). Furthermore, occupations such as general laborers, general maintenance workers, clerks, cashiers, waitresses, and customer service workers are excluded from the analysis presented in **Figures 7 and 9** because it is assumed that these workers will have neither the skills nor the training necessary to transfer to a highly skilled white-collar or blue-collar job.

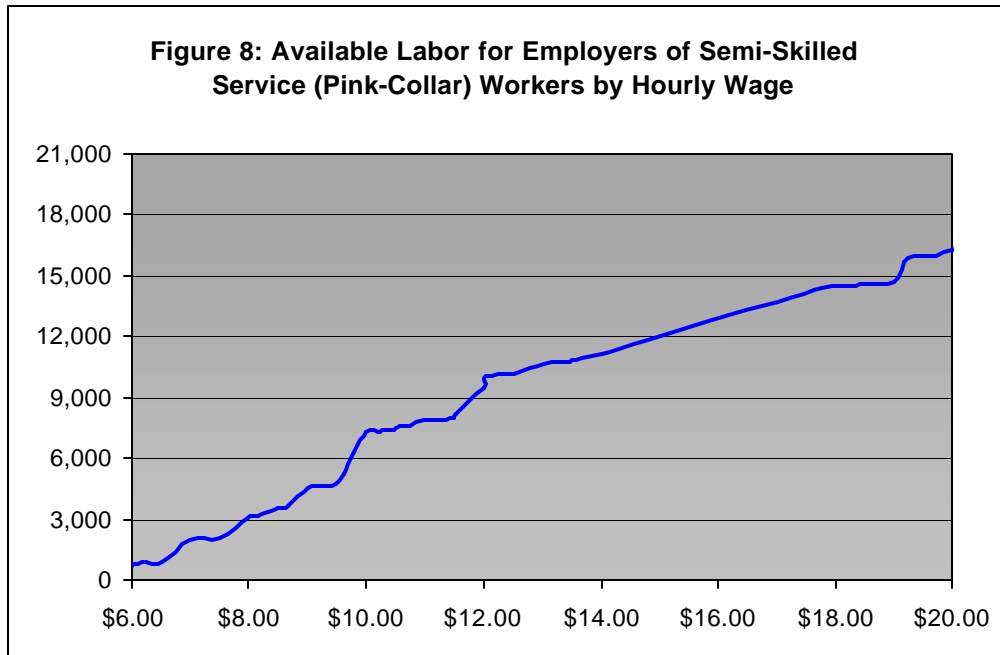
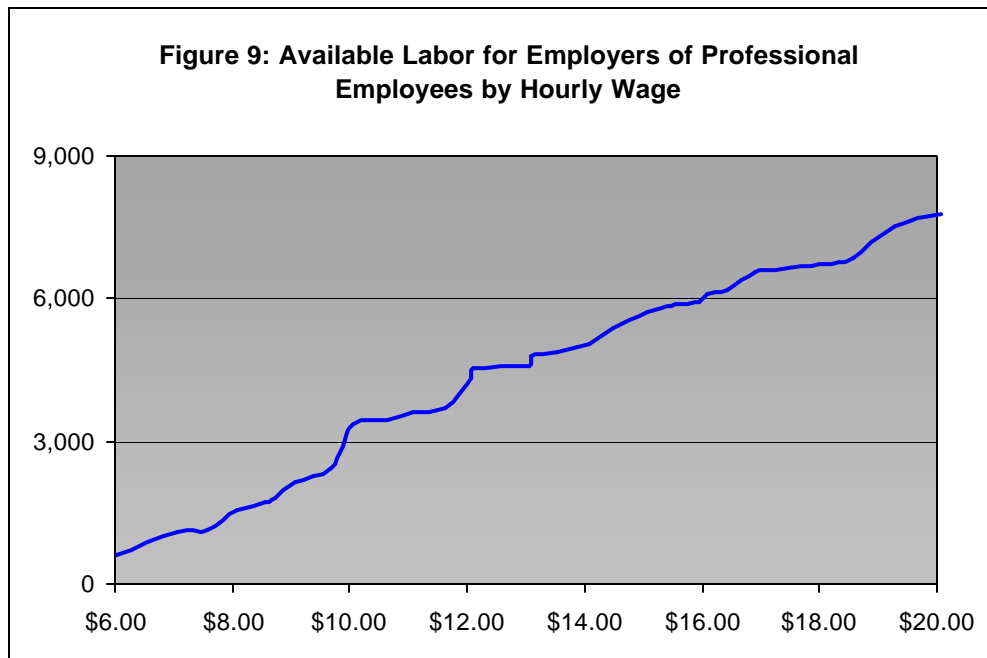


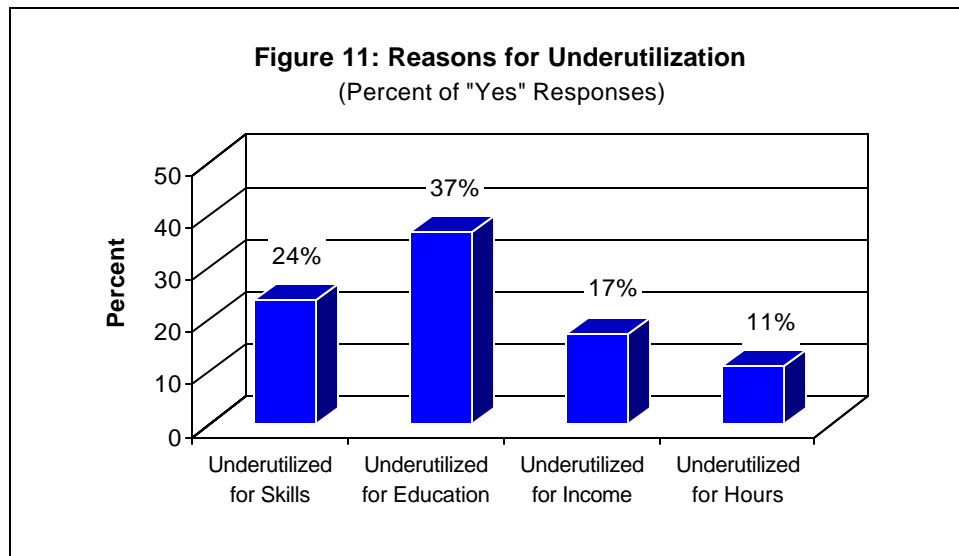
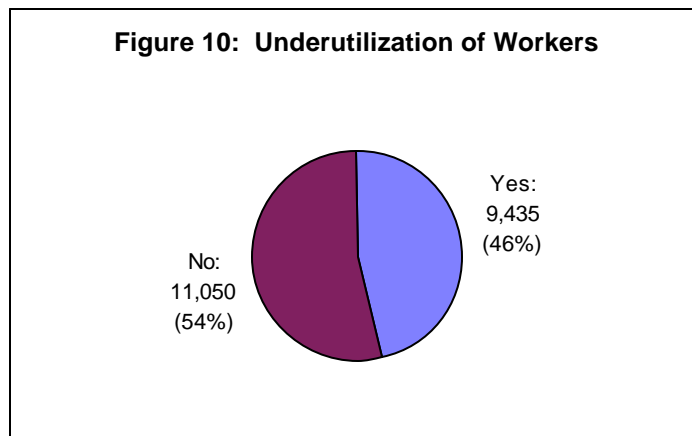
Figure 9 (below) shows that an employer offering \$18.00 an hour (or \$37,440 per year) for highly skilled white-collar workers (or “Professional”), the available labor is about 6,395 individuals. At \$16.00 per hour (or \$33,280 or year) there are about 5,780 individuals available, at \$14.00 per hour (or \$29,120 per year) there are about 4,720 individuals available, and at \$12.00 per hour (\$24,960 annually) there are about 4,200 available.



## Underutilization Among the Available Labor Pool

Underutilization — individuals possessing skills and/or training that exceeds the responsibilities of their current job — is a significant issue in many communities. To assess underutilization in the Elkhorn Valley Labor Basin, **working survey respondents** were presented with a scenario describing underutilization. They were then asked a series of questions assessing if they perceived themselves as underutilized on the job because: their skill level is greater than their current job requires, they possess higher levels of education than is required on the job, they earned a higher income at a similar job previously, and/or their current position does not provide full-time hours.

Figure 10 indicates that slightly less than half (or 9,435) answered “yes” to any of these questions, and consider themselves underutilized. Figure 11<sup>8</sup> shows the percentages of the positive responses (i.e., “yes” answers) to the various measures of underutilization. These figures show that many of the underutilized members of the Available Labor Pool consider themselves as possessing education levels exceeding those needed for their current jobs.



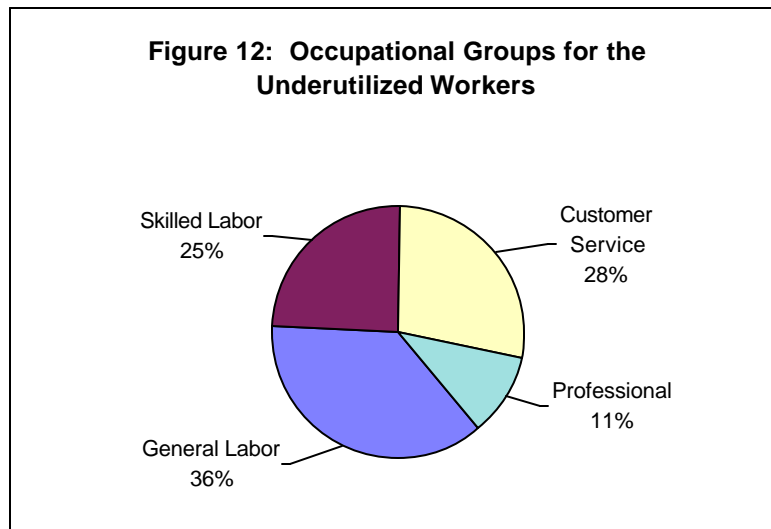
<sup>8</sup> The responses shown in Figure 11 are **not** mutually exclusive (i.e., respondents could answer “yes” to more than one question).

Table 6 and Figure 12 show some characteristics of the underutilized members of the Available Labor Pool. Table 6 indicates that the education level of the underutilized workers is high, with slightly more than three-quarters (75.5%) having at least some college education and almost all (96.2%) having high school diplomas.

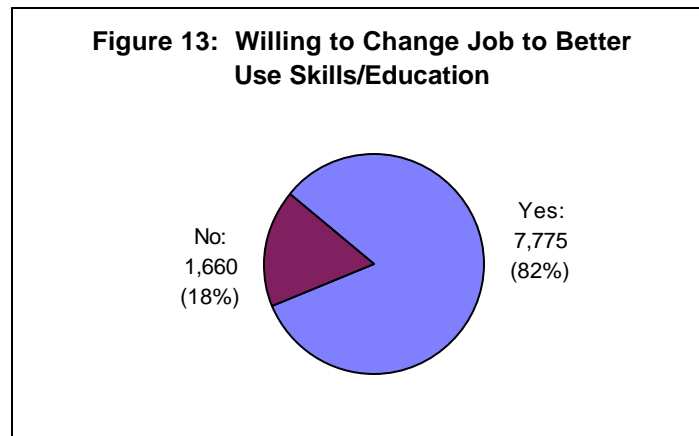
**Table 6: Highest Level of Education Achieved Among Underutilized**

|                          | Number | Percent | Cum. Percent |
|--------------------------|--------|---------|--------------|
| Doctoral Degree          | 51     | 0.5     | 0.5          |
| Masters Degree           | 35     | 6.4     | 7.0          |
| Bachelors Degree         | 2,054  | 21.8    | 28.7         |
| Associates Degree        | 1,249  | 13.2    | 42.0         |
| Some College             | 3,168  | 33.6    | 75.5         |
| High School Diploma Only | 1,953  | 20.7    | 96.2         |
| Less HS Diploma          | 354    | 3.8     | 100.0        |
| Total                    | 9,435  | 100     |              |

Figure 12 (below) shows that about 60% of the underutilized workers are employed as general labor and skilled blue-collar workers, and about 40% are in customer service-related occupations and professional positions.



Respondents indicating that they were underutilized were then asked a follow-up question addressing the willingness to change jobs in order for them to better utilize their skills and/or education. Figure 13 suggests that a very substantial portion of the underutilized workers (82%) is willing to change jobs to address underutilization.



## Methodology

The findings from this study are based on a random digit telephone sample<sup>9</sup> of 1,675 adults living in seven counties in central Nebraska. Survey data was collected from May 19, 2003, to June 12, 2003, using a Computer Assisted Telephone Interviewing (CATI) system. A total of 1,675 households were successfully contacted during the phone survey, and in 1,102 of these households an adult agreed to do the interview. This represents a cooperation rate of 66%. As previously mentioned, the margin of error for the survey findings of the 1,102 respondents is +/- 2.95%. The margin of error for the Available Labor Pool is +/- 4.6%.

The study sponsors and Institute personnel agreed upon the survey items used, with the former identifying the study objectives and the latter developing items that were valid, reliable, and unbiased. Question wording and design of the survey instrument are the property of the Docking Institute. A detailed summary of the method of analysis used in this report can be found in Joseph A. Aistrup, Michael S. Walker, and Brett A. Zollinger, "The Nebraska Labor Force Survey: The Available Labor Pool and Underemployment." *Nebraska Department of Human Resources*, 2002.

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<sup>9</sup> The telephone numbers for the sample were assembled by randomly generating suffixes, within specific area codes and prefixes. As such, unlisted numbers were included in this sample, minimizing the potential for response bias. Known business, fax, modem, and disconnected numbers were screened from the sample in efforts to reach households only (and to minimize surveyor dialing time).

Up to eight attempts were made to contact each respondent during three calling periods (10 AM to Noon, 2 PM to 4 PM, and 6 PM to 9 PM) relative to the appropriate time zones. Initial refusals were re-attempted by specially trained "refusal converters," which aided in the high response rate.