



2018 JOBS SURVEY

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Executive Summary

This report summarizes and compares 2017 and 2018 Jobs Survey outcomes as success metrics for Fort Ord Reuse Authority (FORA) Economic Recovery Goals. Primary and secondary research techniques were used including online business searches, email surveys, and in-person/phone communications. The survey area was limited to the former Fort Ord boundary, and reported results include existing and near-term projected full-time (FT) and part-time (PT) positions. Survey results will be incorporated in FORA's Annual Report as directed by the Base Reuse Plan (BRP) Context and Framework (3.11.5.4 (c), pg. 208).

132 employers and 5652 positions were identified within the former Fort Ord boundary, representing a 14% (694 jobs) increase in total jobs since 2017, with majority being full-time positions. Business types on the former Fort Ord include: professional services (42%); retail/food service (23%); education related (19%); recreation (8%); and military (6%). Military-related account for the largest employment group, followed by education-related, professional, retail and recreation. These results represent an overall 31% progress towards the 18,000 BRP post-Fort Ord jobs target.

Ford Ord Reuse Authority Geography & Context

The Fort Ord Reuse Authority (FORA) is responsible for the oversight of Monterey Bay area economic recovery from the closure of and reuse planning of the former Fort Ord military base. The former Fort Ord was/is located on 45 square miles (28,000 acres) of the California coastline between the Salinas Valley and the Monterey Peninsula, in Monterey County, California (Figure 1).

FORA implements its legislatively mandated mission by overseeing replacement land use; assuring compliance with adopted measures; removing physical barriers to reuse; financing and constructing major components of the required infrastructure and base wide demands; and protecting identified environmental reserves. FORA exercises its planning, financing, and monitoring responsibilities under state law authority to meet these objectives in the best interest of the Northern Monterey Bay Community (FORA 2016).

Base Reuse Plan Recovery Targets

Replacement of 18,000 jobs lost as a result of the closure of Fort Ord remains a major Base Reuse Plan (BRP) goal. BRP market studies suggest weak industrial and commercial job creation, which could be a principal limitation on non-residential development. Once 18,000 estimated jobs within the former Fort Ord boundaries are realized, the Residential Development Program (3.11.5.4(b)) shall be eliminated (FORA, Base Reuse Plan, 3.11.5.4 (c), pg. 208).

The BRP requires that FORA incorporate job creation reports into its annual report and establishes an economic recovery target of 18,000 jobs. Originally assigned as a jurisdictional BRP obligation, FORA began conducting the survey on behalf of the member jurisdictions in 2015. FY 2014-15 survey results indicated a total of 3,374 full time and 711 part time jobs on former Fort Ord (Table 1), representing a 23% progress towards the original BRP jobs target. Results from the 2017-2018 survey have indicate a cumulative 31% (5652 total jobs) progress towards the BRP jobs target (Table 1).

2018 Jobs Survey Goals

The FORA Jobs Survey is an economic recovery monitoring tool for FORA and its member jurisdictions. The survey identifies the number of employees, people, and general occupations of employees on the former Fort Ord. Additionally, the survey gathers attitudes, opinions, and behaviors about the business eco-system on the former Fort Ord. The data provides valuable information for economic development efforts, and is used as a benchmarking tool to gauge economic development progress.

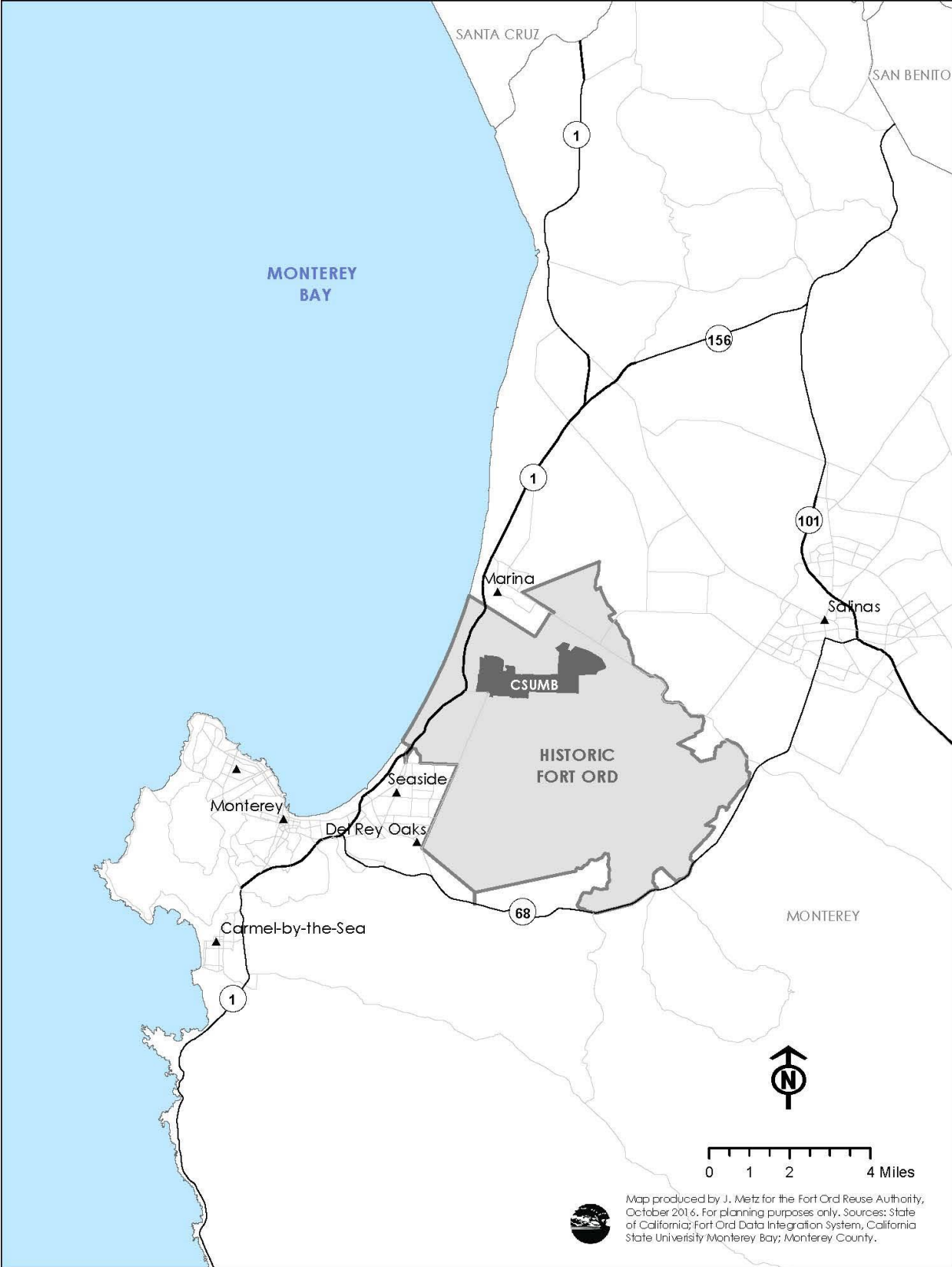


Figure 1. Fort Ord geography, Monterey County, California.

Research Questions

The 2018 Jobs Survey addressed the following questions:

1. What companies operate on former Fort Ord?
2. How many current jobs are on former Fort Ord?
3. How many new businesses are on the former Fort Ord?
4. What is the change in jobs on former Fort Ord between 2017 and 2018?

Data Collection Methods

Jobs Survey data collection included both primary and secondary methods. Primary research methods consisted of email questionnaires, direct phone calls to businesses, follow-up emails, and in-person business visitation. Secondary research methods consisted of locating initial businesses and recipient contact information using Google maps, for primary websites of companys/ organizations within the area, news sources, and garnered database information from prior Jobs Surveys.

Survey Monkey, an online survey tool was used to design and implement the survey. The survey was structured as a question hierarchy by importance, topic introductions, and section breaks. Respondents were asked to identify the business name, type of business, number of full time/ part time employees, employee occupation, and supplementary questions regarding the businesses longevity and growth (Appendix 1). The survey was distributed using the FORA Economic Development mailing list in Mail Chimp.

Database Construction Creation of the initial survey and accompanying market research (C. 2015), led to the establishment of a preliminary database consisting of the 90 businesses surveyed within the former Fort Ord boundary (Appendix 4), an additional 22 businesses were added in 2017 (Total. 112) (Appendix 3), and an additional 20 businesses in 2018 (Total. 132) (Appendix 2). Each new business has been added to the growing database, in addition to FORA's Economic Develop online Business Directory (<http://OrdForward.org/business-directory/>).

Results and Challenges

Table 1. Former Fort Ord non-construction jobs survey results (2015-2018), Monterey County, CA.

Jobs ¹	2015	2017	2018	% Change 2017-2018
Full-Time	3,374	3,461	4165	20%
Part-Time	711	1,497	1487	0%
Part-Time FTE	356	749	744	0%
Totals FTE (FT + FTE)	3,730	4,210	4909	16%
Totals (FT + PT)	4,085	4,958	5652	14%

¹Excludes construction contract jobs (estimated to be approximately 3000 across, 3 developments).

The 2018 Jobs Survey yielded 4,165 full-time positions, 1,487 part-time positions (5,652 total positions and 4,909 Full-time equivalent (FTE)) within the former Fort Ord boundary. These data are represent a 14% overall increase in jobs numbers in the study area.

Data Analysis Survey data indicate 20% growth in full-time positions and no significant change in part time positions between 2017 and 2018. The increase in full-time position may reflect new positions associated with commercial developments in the Dunes on Monterey Bay, and continued Jobs Survey data acquisition improvement.

Response Rates Total survey respondents were 105 of 132 potential, which is a response rate increase from the prior year (70 respondents). This change may be a result of increased direct site-visits. Non-respondent employee data were carried forward from the prior year results. Email and Web responses accounted for 18% (18 respondents), While phone calls and site-visits accounted for 82% (87 respondents).

Challenges

The Email and Mail Chimp Survey responses decreased from 23% in 2017 to 11% 2018, which required increased on-site visits. Additionally, some businesses were unable to provide employment data due to confidentiality policies.

Employment data from non-participating businesses would likely increase the jobs survey totals.

Conclusion

Survey results indicate continued jobs growth on the former Fort Ord, exceeding State and Federal trends. A total of 5652 jobs reported in the 2018 Jobs Survey are a 14% growth from 2017, and overall 31% progress towards the original 18,000 jobs BRP target. Continued regional economic development efforts will contribute to improvements in this metric over time. Future jobs surveys could be improved through increased survey awareness and employer participation. Continual improvement will focus on ensuring a comprehensive employer database, increasing survey awareness among business groups, and recruiting more complete employer participation.

References

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Fort Ord Reuse Authority (FORA). (2016). FORA 2015-2016 Annual Report. Retrieved from <http://fora.org/>

Fort Ord Reuse Authority (FORA). (2017). FORA 2016-2017 Annual Report. Retrieved from <http://fora.org/>

Milsinki, J. (2017, April 10). The Ratio of Part-Time Employed Remains High, But Improving. *Advisor Perspectives*. Retrieved from <https://www.advisorperspectives.com/dshort/updates/2017/04/10/the-ratio-of-part-time-employed-remains-high-but-improving>

Appendix 1: 2018 Survey Questionnaire



FORA 2018 Jobs Survey

Thank you for participating in the [Fort Ord Reuse Authority \(FORA\)](#) annual jobs survey. FORA and its member jurisdictions continue to support regional economic recovery from the 1994 Fort Ord base closure. This survey data will measure economic recovery progress on the former Fort Ord in the Monterey Bay region.

You are receiving this survey because your business location is within the former Fort Ord boundary. Survey results will be summarized and included in a final, publicly available report to the FORA Board. The survey should take 5-7 minutes and will ask questions regarding the number of employees at your location on the former Fort Ord. Thank you for your time on this important effort. Please click 'Next' to begin.

Next

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FORA 2018 Jobs Survey

Thank you for providing your contact information. Your contact information ensures accurate data collection.

*** 1. Please fill in the following Contact Information** 

Name	<input type="text"/>
Company	<input type="text"/>
Address	<input type="text"/>
City / Town	<input type="text"/>
State / Province	<input type="text"/>
Zip / Postal Code	<input type="text"/>
Email Address	<input type="text"/>

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FORA 2018 Jobs Survey

Thank you for your time on this important effort. The following questions will measure economic recovery progress on the former Fort Ord in the Monterey Bay region.

*** 2. What sector is your business?**

- Government
- Non-Profit
- Private
- Self-employed

*** 3. Please tell us the number of employees at your enterprise/ agency by employment type.**

Full-time	<input type="text"/>
Part-time	<input type="text"/>
Student Intern (Full-time)	<input type="text"/>
Student Intern (Part-time)	<input type="text"/>
Volunteer	<input type="text"/>

*** 4. Please tell us how many employees are in each general occupation group.**

Administrative Support, including Clerical	<input type="text"/>
Executive, Administrative, and Managerial	<input type="text"/>
Laborers, Handlers, Equip. Cleaners & Helpers	<input type="text"/>
Machine Operators, Assemblers, and Inspectors	<input type="text"/>
Other (Military Occupations, Clergy, etc.)	<input type="text"/>
Production, Manufacturing, Craft, and Repair	<input type="text"/>
Professional, Technical and Related Occupations	<input type="text"/>
Sales Occupations	<input type="text"/>
Service Occupations, Except Private Household	<input type="text"/>
Transportation and Material Moving Occupations	<input type="text"/>

Prev **Next**

FORA 2018 Jobs Survey

Thank you for your time on this important effort. The following questions will help us understand your current and future location on the former Fort Ord.

5. When did your enterprise/ agency begin operating at the current location?

Date

6. How confident are you that the enterprise/ agency will stay at the same location for the next:

	Not confident	Neutral	Confident
3 Years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5 Years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. Please select a response to the following topics as related to your business location.

	Advantage	Neutral	Disadvantage
Access via roads, bridges, public transit, highway	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability and quality of workforce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability and cost of commercial / business space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability and cost of parking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to banks and professional services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to arts, cultural and entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to retail, recreational and shopping opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Crime rate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Commute time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Infrastructure conditions (internet, distribution routes, roads, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restaurants, Eateries and taverns	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Neighborhood appearance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tax Structure (state and local)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water, air, and land quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (Please Specify)

Appendix 2: 2018 Survey Respondents

1. AAFES Gas Station
2. AAFES Military Exchange PX
3. AdapCS
4. Central Coast Veterans Cemetery Foundation
5. Dual Language Academy of the Monterey Bay
6. Fort Ord Chapel
7. Lawyer Referral Service
8. Major General William H. Gourley VA-DoD Outpatient Clinic
9. MidPen Housing Affordable Apts
10. Monterey Adult School
11. Monterey County Bar Association
12. Monterey County Social Services: Adult
13. Monterey Military Attic
14. MPC Monterey Peninsula College: Ed Center at Marina
15. MPUSD - George C Marshall Elementary School
16. Parks at Monterey Bay OMC
17. Public Safety Training Center- MPC PSTC
18. Seaside Middle School
19. Starbucks (The Dunes)
20. University Village Apartments/ Eden Housing
21. US ARMY: Ord Military Community OMC (inclusive)
22. USAOMC- Ord Community Commissary
23. Anytime Fitness
24. A & A Automative (Sasaki Brothers)
25. A Taste of Elegance
26. Alliance Residential (Preston Park)
27. American Job Center
28. Anzu Corporation
29. AR Gutters
30. Arcadis
31. Arcadis: Westcliffe
32. Arcadis: Weston
33. Army National Guard Recruiting Center
34. Bayonet Blackhorse Golf Course/Seaside Resort
35. Bed Bath and Beyond
36. Best Buy
37. Blaze Pizza
38. Brotherhood of Carpenters: Union Hall
39. Builders Exchange, Central Coast Builders Association
40. Bureau of Land Management Central Coast Field Office
41. Cardinale
42. Central Coast Baptist Church
43. Central Coast Federal Credit Union
44. Central Coast Veterans Cemetery
45. Chartwell School
46. Chipotle
47. Christian Memorial Community Tabernacle Church
48. Christine Marie's Star Riders
49. Cinemark Marina
50. Coalition for the Homeless
51. Community Homeless Solutions (Formerly: Shelter Outreach Plus)
52. Creegan & D'Angelo
53. CSU Monterey Bay (CSUMB) - incl: Police
54. CSUMB Contractors - Sodexo, Zero Waste, Brightview, Alliance, Davy Tree
55. Davita Clinic
56. Deli Delicious
57. Desert Star Systems
58. Don Chapin (Fort Ord Recycle facility)
59. East Garrison
60. Everyone's Harvest (Farmer's market)
61. Famous Footwear
62. Fort Ord Cleanup Administrative Record
63. Fort Ord Natural Reserve
64. Fort Ord Reuse Authority (FORA)
65. Fort Ord Works
66. Furniture Avenue
67. Gel-a-tins Stamp Company
68. General Stilwell Community Center
69. H&R Block
70. Habitat for Humanity ReStore
71. Interim, Inc.
72. Interim, Inc. Rockrose Gardens
73. Kohls
74. Las Animas Concrete
75. Learning for Life
76. Light and Motion
77. Marina Coast Water District
78. Marina Equestrian Facility
79. Marina High School
80. Marina Municipal Airport Office - OAR
81. Mattress Firm
82. Menchie's Yogurt (AGII Enterprises, Inc.)
83. Michael's
84. Montage Wellness Center
85. Monterey Bay Economic Partnership
86. Monterey Child Development Center: AFT/NEF
87. Monterey College of Law
88. Monterey County Buisness Council

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| 89. Monterey County Business Council | 109.Smashburger |
| 90. Monterey Institute for Research in Astronomy (MIRA) | 110.Sports Clips Hair Cuts |
| 91. Monterey Salinas Transit (MST) | 111.Springhill Suites Marina |
| 92. Naval Post Graduate School - Cirpas | 112.Subway |
| 93. Old Navy | 113.Supervisor Jane Parkers Office |
| 94. Ord Community Veterinary Clinic | 114.Target |
| 95. Ord Market | 115.Teriyaki Madness |
| 96. Party City | 116.Tricord Tradeshow Services |
| 97. Pemcon Inc. | 117.Ubreakiphix |
| 98. Pizza My way | 118.UCMBEST Center of University |
| 99. Pokebar | 119.Universal Heated Hoses |
| 100.Polished Nails | 120.US Department of Defense |
| 101.Porter Youth Center | 121.Verizon |
| 102.Red Shift | 122.Veterans Transition Center |
| 103.REI | 123.Vocational Rehabilitation Specialists, Inc. |
| 104.Ross Roofing | 124.Water City Roller Hockey |
| 105.Second Start | 125.YoungNak Presbyterian Church of Monterey |
| 106.Shea Homes | 126.Thi Label & Packaging |
| 107.Shoreline Workforce Development | 127.Kemron |
| 108.Sky Dive Monterey Bay | 128.Tucci |
| | 129. Behavioral Health Services |

Respondents relocating from 2015

1. North Tree Fire
2. Builders Exchange, Central Coast Builders Association
3. Gel-a-fins Stamp Company

Appendix 3: 2017 Survey Respondents

1. Arcadis
2. Arcadis: Westcliffe
3. Arcadis: Weston
4. Creegan & D'Angelo
5. East Garrison (contractors as of 9/25/15)
6. Marina Community Partners (MCP) Contractors (9/29/14)
7. Builders Exchange, Central Coast Builders Association
8. Gel-a-tins Stamp Company
9. North Tree Fire
10. AdapCS
11. A & A Automative (Sasaki Brothers)
12. AAFES Gas Station
13. AAFES Military Exchange PX
14. Central Coast Baptist Church
15. Fort Ord Chapel
16. Monterey Adult School
17. Monterey County Social Services: Adult
18. Monterey Military Attic
19. Parks at Monterey Bay OMC
20. Ranger Cayton Sta Foundation
21. Seaside Middle School
22. US Department of Defense
23. Dual Language Academy of the Monterey Bay
24. Monterey Clinic: VA Palo Alto Health Care System
25. Davita Clinic
26. Polished Nails
27. Springhill Suites Marina
28. Seaside Resort
29. California Dep. Of Parks and Rec.
30. Central Coast Federal Credit Union
31. East Garrison
32. Interim, Inc.
33. Monterey Salinas Transit (MST)
34. MPUSD - George C Marshall Elementary School
35. Ord Community Veterinary Clinic
36. US ARMY: Ord Military Community OMC
37. USAOMC - Dolce couture
38. USAOMC – Presido
39. USAOMC- Ord Community Commissary
40. YoungNak Presbyterian Church of Monterey
41. Chipotle
42. Deli Delicious
43. Blaze Pizza
44. Central Coast Veterans Cemetery
45. Central Coast Veterans Cemetery Foundation
46. Everyone's Harvest (Farmer's market)
47. Habitat for Humanity ReStore
48. Interim, Inc. Rockrose Gardens
49. Mattress Firm
50. Menchie's Yogurt (AGII Enterprises, Inc.)
51. Monterey County Business Council
52. Public Safety Training Center- MPC PSTC
53. Red Shift
54. Second Start
55. Smashburger
56. Sodexo
57. Sports Clips Hair Cuts
58. Starbucks (The Dunes)
59. Teriyaki Madness
60. University Village Apartments/ Eden Housing
61. Verizon
62. Christian Memorial Community Tabernacle
63. Cinemark Marina
64. Fort Ord Cleanup Administrative Record
65. Fort Ord Natural Reserve
66. Furniture Avenue
67. General Stilwell Community Center
68. H&R Block
69. Lawyer Referral Service
70. Marina High School
71. Monterey Child Development Center
72. Monterey County Bar Association
73. Porter Youth Center
74. Vocational Rehabilitation Specialists, Inc.
75. Alliance Residential (Preston Park)
76. American medical response

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| 77. Anzu Corporation | 99. MidPen Housing Affordable Apts |
| 78. Army National Guard Recruiting Center | 100.Monterey Bay Economic Partnership |
| 79. Bayonet Blackhorse Golf Course | 101.Monterey College of Law |
| 80. Bed Bath and Beyond | 102.Monterey Institute for Research Astronomy (MIRA) |
| 81. Best Buy | 103.MPC Monterey Peninsula College: |
| 82. Brotherhood of Carpenters: Union Hall | 104.Old Navy |
| 83. Bureau of Land Management Central Coast Field Office | 105.Ord Market |
| 84. Chartwell School | 106.Party City |
| 85. Christine Marie's Star Riders | 107.Pemcon Inc. |
| 86. Coalition for the Homeless | 108.Peninsula Wellness Center (CHOMP) |
| 87. Community Homeless Solutions (Formerly: Shelter Outreach) | 109.Plz My way |
| 88. CSU Monterey Bay (CSUMB) | 110.REI |
| 89. Desert Star Systems | 111.Ross Roofing |
| 90. Don Chapin (Fort Ord Recycle facility) | 112.Shea Homes- The Dunes on Monterey Bay |
| 91. Famous Footwear | 113.Shoreline Workforce Development |
| 92. Fort Ord Reuse Authority (FORA) | 114.Sky Dive Monterey Bay |
| 93. Kohls | 115.Subway |
| 94. Las Animas Concrete | 116.Supervisor Jane Parkers Office |
| 95. Light and Motion | 117.Target |
| 96. Marina Equestrian Facility | 118.Tricord Tradeshow Services |
| 97. Marina Municipal Airport Office – OAR | 119.UCMBEST Center |
| 98. Michael's | 120.Veterans Transition Center |

Appendix 4: 2015 Survey Respondents

1. Alliance Residential
2. American medical response
3. Anzu Corporation
4. Army National Guard Recruiting
5. Bayonet & Blackhorse Golf Course
6. Bed Bath and Beyond
7. Best Buy
8. Blaze Pizza
9. Brotherhood of Carpenters
10. Bureau of Land Management
11. Central Coast Veterans Cemetery
12. Central Coast Veterans Cemetery Foundation
13. Chartwell School
14. Christian Memorial Community Tabernacle Church
15. Christine Marie's Star Riders
16. Cinemark Marina
17. Coalition for the Homeless
18. Community Homeless Solutions
19. CSU Monterey Bay
20. Desert Star Systems
21. Don Chapin
22. Everyone's Harvest
23. Famous Footwear
24. Fort Ord Cleanup Administrative Record
25. Fort Ord Natural Reserve
26. Fort Ord Reuse Authority
27. Furniture Avenue
28. General Stilwell Community Center
29. H&R Block
30. Habitat for Humanity ReStore
31. Interim, Inc. Rockrose Gardens
32. Kohl's
33. Las Animas Concrete
34. Lawyer Referral Service
35. Light and Motion
36. Marina Equestrian Facility
37. Marina High School
38. Marina Municipal Airport
39. Mattress Firm
40. Menchie's Yogurt
41. Michael's
42. MidPen Housing
43. Monterey Bay Economic Partnership
44. Monterey Child Development Center
45. Monterey College of Law
46. Monterey County Bar Association
47. Monterey County Business Council
48. Monterey Institute for Research in Astronomy
49. Monterey Peninsula College Marina
50. Old Navy
51. Ord Market
52. Party City
53. Pemcon Inc.
54. Montague Wellness Center
55. Pizza My way
56. Porter Youth Center
57. MPC Public Safety Training Center
58. Red Shift
59. REI
60. Ross Roofing
61. Second Start
62. Shea Homes
63. Shoreline Workforce Development
64. Sky Dive Monterey Bay
65. Smashburger
66. Sodexo
67. Sports Clips Hair Cuts
68. Starbucks (The Dunes)
69. Subway
70. Supervisor Jane Parkers Office
71. Target
72. Teriyaki Madness
73. Tricord Tradeshow Services
74. UCMBEST Center of UC Santa Cruz
75. Eden Housing
76. Verizon
77. Veterans Transition Center
78. Vocational Rehabilitation Specialists
79. Water City Roller Hockey