



REGIONAL
SUMMIT
2005
MANUFACTURERS
OF NORTH & EAST
T E X A S

The Promise and Challenge of Competitive Advantage

April 20, 2005
Northeast Texas Community College
Mount Pleasant, Texas

***Presented by:* North East Texas Workforce Board**

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Challenges and Opportunities in the Evolving Manufacturing Labor Market Richard Froeschle	
Engines of the Texas Economy: Industry Cluster Initiative Maria Smith	
Texas Manufacturing Assistance Center Drew Casani	
Attendees	

AGENDA

- 7:15 am** **Continental Breakfast & Registration**
- 8:00 am** **Opening Remarks**
Dr. Charles Florio, President
Northeast Texas Community College

Susan Kerr, Chair
North East Texas Workforce Board

Kay O'Dell, Executive Director
North East Texas Workforce Board
- 8:15 am** **Keynote Address**

Stephen Yellin, Managing Director
Electronics & Advanced Technology, CH2M Hill (Lockwood Greene)

The Challenge of the Global Economy to Texas Manufacturing
- 9:15 am** **BREAK**
- 9:30 am** **Speaker**

Richard Froeschle, Deputy Director
Labor Market & Career Information, Texas Workforce Commission

Challenges and Opportunities in the Evolving Manufacturing Labor Market
- 10:30 am** **Regional Analysis: Part One**

Maria Smith, Industry Initiatives Manager
Texas Workforce Commission

Engines of the Texas Economy Industry Cluster Initiative
- 12:00 pm** **LUNCH**
- 1:00 pm** **Regional Analysis: Part Two**

Maria Smith
- 1:30 pm** **Closing Remarks**

Ron Lehman, Commissioner Representing Employers
Texas Workforce Commission
- 2:00 pm** **Tour: Northeast Texas Community College
University and Health Sciences Center**

Kevin Rose, Dean of Workforce Education
Northeast Texas Community College

Summary of the Event

On April 20, 2005, leaders from manufacturing, education, economic development and government gathered from throughout northeast Texas to discuss and identify the critical business issues facing manufacturers in the region.

Stephen Yellin, Managing Director, Electronics & Advanced Technology, CH2M Hill (Lockwood Greene), served as the keynote speaker and kicked off the summit with an overview of the new economy and its impact on operations. Yellin highlighted lean implementations through innovative solutions.

Richard Froeschle, Deputy Director for Labor Market and Career Information (LMCI) and the staff director for the Texas ACRN entity within the Texas Workforce Commission, spoke to attendees about how the fundamentally different global economy continues to affect all sectors of the Texas economy, but none more important than the impact on the manufacturing sector. Froeschle's discussion focused on factors shaping business decisions in the manufacturing sector with an emphasis on the demand for labor and the impacts on domestic job creation.

During the session, Maria Smith, Industry Initiatives Manager, Texas Workforce Commission, facilitated a forum to:

- Discuss regional issues and resources
- Identify regional strengths and needs
- Profile the Advanced Technology & Manufacturing cluster in the North & East Texas region
- Develop a long range plan to strengthen the industry

During the afternoon, Drew Casani, Texas Manufacturing Assistance Center, provided summit participants with an overview of the expertise and assistance offered by the Texas Manufacturing Assistance Center (TMAC).

Ron Lehman, Commissioner representing employers, Texas Workforce Commission closed the day's event with a challenge to the participants. Commissioner Lehman strongly encouraged the attendees to remain engaged in the strategic planning process to realign and restructure workforce and economic development efforts to give the North East Texas region a competitive advantage.

After the summit adjourned, Kevin Rose, Dean of Workforce Education, Northeast Texas Community College conducted a tour of the new Northeast Texas Community College University and Health Sciences Center.

North East Texas Workforce Board will continue to work with representatives from industry, economic development, education, and government to dialogue and develop specific action plans to address the economic and workforce development issues and needs of the region.

The summit was sponsored by: Northeast Texas Community College; Texarkana Chamber of Commerce; North East Texas Economic Developers' Roundtable Group; Mt. Pleasant Industrial Foundation; Red River Redevelopment Authority; AEP/Southwestern Electric Power Company; Alcoa Mill Products; Five Star Industrial Group; JCM Industries; Day & Zimmermann, Inc., Lone Star Division; and Workhorse Marketing.

Industry Cluster Assessment

Regional Profile of the Manufacturing Industry

Statistics:

- From 1998 – 2004 Northeast Texas lost 1,458 jobs in manufacturing (6.93% of the total manufacturing jobs in Texas)
- Between 2002 – 2004 338 jobs lost
- High number of persons eligible to retire
- North East Texas has high number of people over 55 in a demographic region; Age bracket between 22 - 45 is the lowest; high risk that there will not be a workforce pipeline of young workers
- Hardest hit industries include metal fabrication products, traditional manufacturing, lumber/timber, textiles
- 12.4% of graduates from post-secondary education entered jobs with temporary contractors

Profile of the Industry and Manufacturing Cluster:

- Growing number of 3rd tier companies
- Strong encouragement and growth in entrepreneurship but no significant players with seed or venture funds; incubator for East Texas, Athens, health sciences
- Highest concentration of manufacturing in the state of Texas
- Employers prefer students, graduates, or new recruited employees that have industry certifications over a university degree
- Agriculture, beef (raising and packaging), mining, lumber, metal fabrication, food processing

Market Trends:

- New emerging competitive trends being adopted by manufacturers; automation, technology, and higher skill set demands
- Globalization affects business purchasing power; Wall Street rewards lean & mean
- Higher cost for natural gas, raw material resources
- Higher cost of benefits and workforce compensation
- Technology driven
- Expansion of markets is global, international
- Higher production, less employees, fewer plant openings
- Outsource non-core functions

S.W.O.T. Analysis

SWOT analysis is one of the most widely used bastions of strategic planning. SWOT can quickly and effectively define critical issues that may serve as the basis for strategies and action plans. The following bullet points outline the SWOT profile for the region. They contain no empirical data. To understand the region's growth potential, the analysis aids in formulating what characteristics define the North East Texas Manufacturing cluster and what industry trends are threatening the region's competitiveness.

Regional Strengths:

- Water and natural resources
- Available real estate
- Available workforce
- Strong mix of top, mid, and entrepreneurial companies
- NAFTA
- Partnerships with industry, economic development and education across state lines
- Logistic, distribution, and supply chain hub; suppliers, vendors, and companies collaborate to maximize investment and resources available
- Existing educational institutions such as universities, community colleges, and technical schools; collaboration between and with industry and educational institutions; industry specific training
- Paris Junior College, recognized program in electro-mechanical program
- Post-secondary Educational Scholarships: Foundation supported
- Location along transportation corridors: U.S. 59; I 30; I 20; I 49; I 69 and Red River
- North Texas Coalition of Education and Industry – Tyler/Longview area; Group of professionals and academic representatives discuss workforce pipeline, curriculum, and vocational training
- High-quality of life
- Branding “The **Right** Corner”

Regional Weaknesses:

- Aging population, shortage of technically skilled workforce, high percentage of workforce is at retirement age (55+)
- Inadequately trained workforce and workforce programs that do not meet the needs of the area
- Technology is changing manufacturing
- Career and school counselors do not present vocational options to students; focus is on college or university; industry willing to train and promote further education, industry certifications
- Independent school districts are not vocational focused
- Companies are spending a significant amount of dollars to train employees; would like to have state match funds
- Inadequate industry focused infrastructure for highways, streets and bridges, and telecommunication
- Relatively low wage levels
- Higher than state average mortality rates

- Workplace literacy, percent of Adults at Level One Literacy higher than state average
- Manufacturing capacity shifting to non-US plants
- Lack of venture capital
- Airport development

Regional Opportunities:

- Jobs available for skilled workers
- Expansion of alternative energy and fuel projects, power and water
Example: power plants on business sites, recycling tires
- Need airport development
- Local incentives
- 4A & 4B Economic Development Sales Tax
- Small Business Development Centers
- University (Tyler) has launched Operation BootStrap – robotics focused

Regional Threats:

- Tort reform, Texas known for litigation
- No government lobbyists to promote interests of the area
- Labor/Management
- Brain Drain
- Loss of Texas Workforce Commission Skills Development Fund dollars
- Marvin Nichols, water reservoir project for DFW; affects businesses (International Paper , 900+ jobs)
- Gap between state resource availability, political channel, and dollars awarded to the North and East Texas area
- Politics between educators, future workforce, and state create long waits to launch programs and results from customized training

Proactive Growth Strategies:

- Industry involved in education and training, aid in building workforce pipeline
- Invest in regional infrastructure, involvement with communication, transportation, supply chain
- Outsource non-core business functions
- Explore labor supply alternatives, utilize temp-contract employment
- Expand supply chain to global range - B2B, Internet; ensure industry builds customer market segments through global presence, partners, and location presence
- Investigate foreign market distributors
- Move into service side of business to expand offerings and increase profits for various business segments - IBM and General Motors example
- Involvement in committees, boards, community activities to elevate business brand

Proposals Requiring State and Regional Support:

- School counselor industry promotion program; counselors invited to visit manufacturers to learn about skills set and competencies needs
- Make state aware of pros and cons of Marvin Nichols reservoir project for North/East Texas area, lobbying assistance
- Program of tax rebates and or incentives for companies and academic institutions that hire graduates from customized training programs
- Texas needs a strategic vision for Economic Development; eliminate competition between cities and regions, market Texas as business friendly
- Aid North and East Texas area to promote strengths and available real estate. This will require information about grants and funds available to the region to build out infrastructure.
- Program to promote manufacturing careers at the K-12 level; industry willing to visit schools, develop on-site training, equipment donation, internships, and tutoring for math and science
- Paris area needs a 4-lane highway.

The Promise and Challenge of Competitive Advantage

April 20, 2005
Northeast Texas Community College
Mount Pleasant, Texas

Appendices

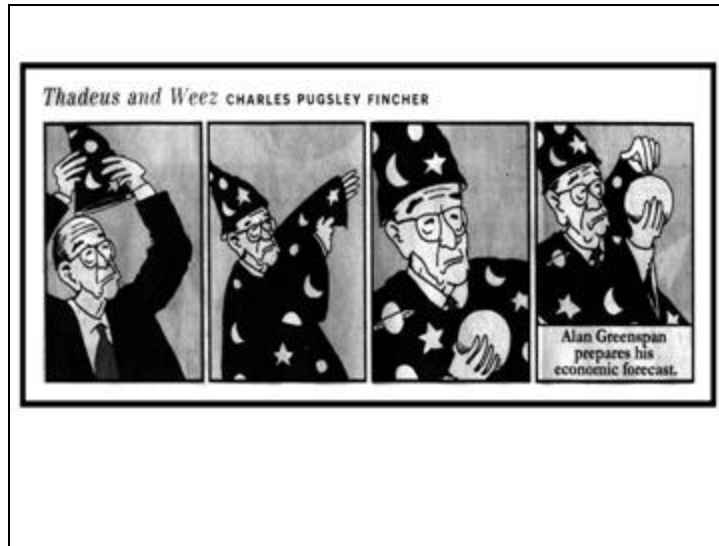
Challenges and Opportunities in the Evolving Manufacturing Labor Market
Richard Froeschle

Slide 1

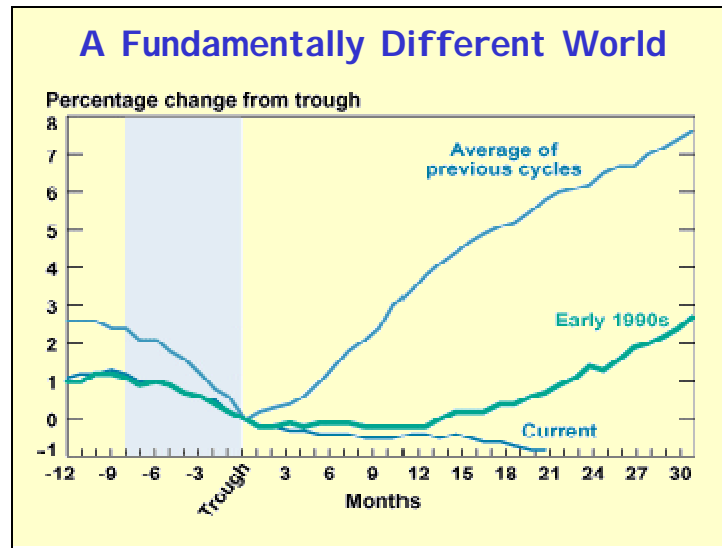
**Challenges and Opportunities in
the Evolving Manufacturing
Labor Market**

Richard Froeschle
rich@cdr.state.tx.us
Labor Market & Career Information (LMCI)
Texas Workforce Commission
(512) 491-4941

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A Structural Transformation: Phenomena Affecting Job Creation in All Industries

- **Rising costs of healthcare benefits**
- **Globalization**-new consumer markets, offshoring, market disconnects, leakages
- **Productivity**-technology, fewer “rules-based” jobs, on-line retail limits bricks & mortar
- **Changing business practices**-contingent wkr, short career ladders w/multiple ports of entry
- **Mergers, acquisitions and consolidations**-expanding market share, “buying” technology, reduce overhead

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Issues Affecting Manufacturing: Job Creation, Job Loss

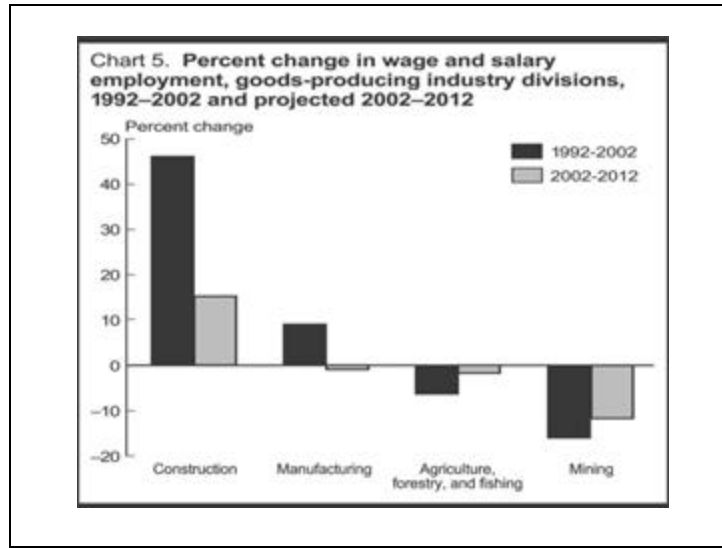
- **Output is expected to rise, competitiveness increases, total employment decline**
- **Soaring benefit and pension plan costs**
- **Higher natural gas prices & availability**
- **Low net job growth but high replacement demand for retiring workers**
- **Age-driven retirements create openings: but not with same skill sets**
- **Technology-driven production processes change labor skill set hiring standards**

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Issues Affecting Manufacturing: Job Creation, Job Loss

- **Increasing demand for higher educated, better credentialed workers to fill new jobs**
- **Outsourcing continues, especially non-core business services; focus on services, offshore commodities**
- **New ways to use labor inputs become commonplace: temps, contract workers**
- **Global economy affects the marketplace; new competition, new opportunities**

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TX Industry Employment CHG 2000-04

Absolute Job Growth		Absolute Job Loss	
Local govt. education	70,100	Computer manuf	- 53,600
Food & drinking places	59,600	Employment Services	-40,900
Home health care	36,400	Federal govt.	-37,800
Hospitals	27,500	Telecommunications	-30,600
Offices of physicians	22,800	Semiconductor manuf	-22,700
Social assistance	19,800	Fabricated metal manuf	-18,200
General merchandise	19,700	Computer system design	-15,600
Credit intermediation	15,700	Grocery stores	-15,400
Educational services	13,700	Durable wholesalers	-13,900
Family & child care	15,400	Chemical manufacturing	-10,400
State govt. education	13,100	Apparel Manufacturing	-17,000
Membership org.	11,500	Plastics/rubber manuf	-10,100
Nursing/residential care	10,600	Transport equip manuf	-7,100

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Manufacturing Job Losses

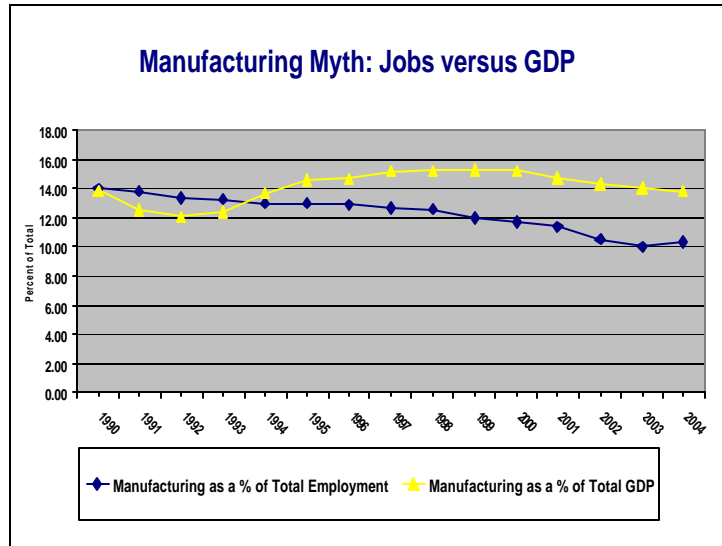
- Northeast Texas Manufacturing
1998-04 **-1,458** -6.93%
2002-04 **-338** -1.61%
- Texas Statewide Manufacturing
1998-04 **-192,409** -17.8%
2002-04 **-80,104** -7.4%

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Manufacturing Job Gainers and Losers in Northeast Texas

- Animal Slaughter/Processing
- Motor Vehicle Body & Trailer
- Fruit, Veg & Specialty Foods
- Ag, Construction, Mining Machinery
- Spring & Wire Manufacturing
- Other Fabricated Metal Products
- Other Wood Products
- Pulp, Paper & Paperboard Mills
- Cut & Sew Apparel
- Converted Paper Product Manufacturing

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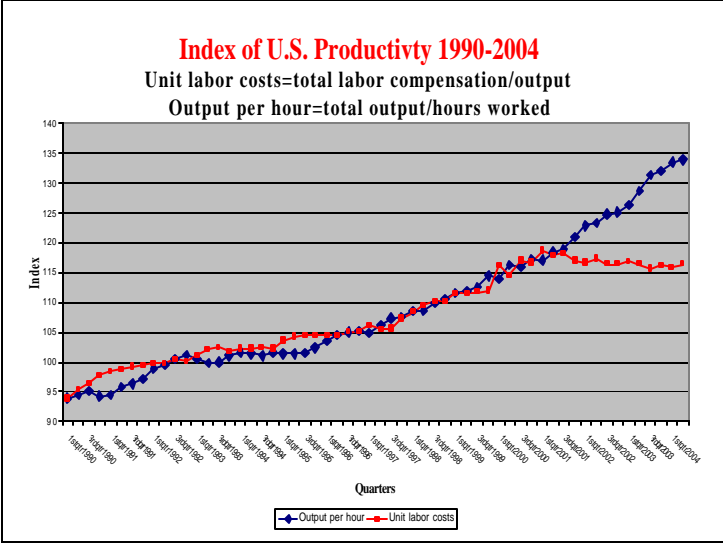


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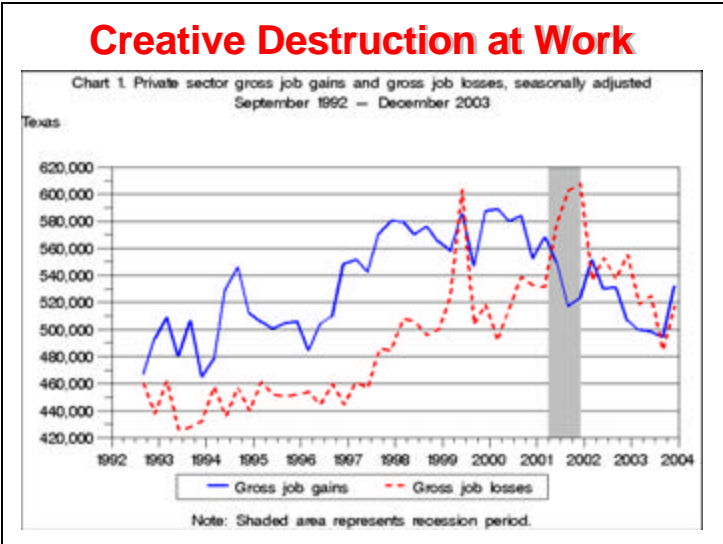
Productivity is King: More Output...Not More Workers (US Projections 2000-2010)

Industry Sector	Output	Employment
• Computers & Related	7.0%	1.6%
• Chemicals	3.3%	.4%
• Industrial Machinery	6.1%	.5%
• Transportation Equipment	3.7%	1.1%
• Motor Vehicles	4.4%	0.8%
• Electrical Equipment	5.3%	0.6%
• Fabricated Metal Products	3.6%	0.8%
• Plastics and Rubber	4.0%	1.4%
• Telephone Communications	6.5%	1.2%
• Computer Data Processing	8.0%	6.4%

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Emerging Markets in a Global Economy: Percent of 2000 & 2004 Revenue Outside U.S.

YUM Brands 34.5% (36.04%)	Intl Paper 22.1% (27.8%)
Gen Motors 26.2% (27.9%)	IBM 57.9% (63%)
Ford 30.4% (41.6%)	Motorola 52.5% (40.3%)
Boeing 34.3% (30.5%)	JNJ 38.2% (41.4%)
Intel 58.8% (80.8%)	John Deere 25.1% (29.1%)
Coca Cola 61.0% (69.7%)	Colgate 69.4% (73.7%)
Corning (n/a) (65.3%)	Nike 50.3% (61.0%)
Emerson Electric 40% (47%)	Campbell Soup n/a (35.6%)
Sara Lee (n/a) (44.1%)	

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How Globalization Impacts the Labor Market—The Basics

- Globalization & new digital technology opens producer/consumer markets around the world
- Increased customer access to producers leads to global price competition, driving employer need for greater productivity, lower costs
- Increased price competition leads to cost containment pressures, especially labor costs
- Cost containments leads employers to new supply chain management practices, concerns over labor costs, alternative labor options

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Investment in China Leads to Corporate Profits, Increase in Domestic Production but \$\$\$ Leakages from US Economy

A \$3 billion investment in the auto industry will likely result in...

- ☑ 33,459 jobs in auto industry
- ☑ 69,112 jobs economy-wide due to multiplier
- ☑ \$723 million in lost wages in auto industry
- ☑ \$1.57 billion in lost wages economy-wide after multiplier effects

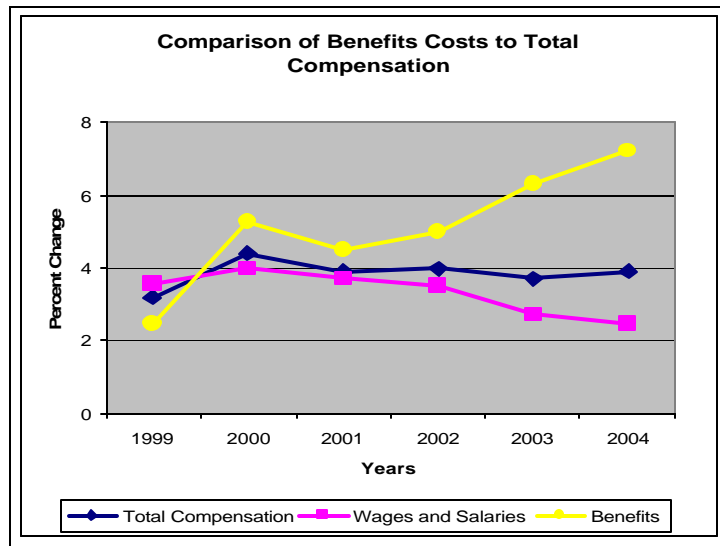
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Baby Boomers Dominate: Percent Growth in the US Workforce by Age between 2000-2010

16 to 24 year olds	15%
25 to 34 year olds	8%
35 to 44 year olds	10%
45 to 54 year olds	21%
55 to 64 year olds	52%
65 plus	30%

Source: Bureau of Labor Statistics

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Shifting Business Practices & Labor Supply Options

- Work existing workers more hours
- Outsource all non-core functions
- Employ temporary or leased workers
- Use contract workers for fixed periods, e.g. increased project orientation of work
- Strategic partnerships to increase sales, limit labor liability
- Take advantage of H1B and L1 visas
- Add full-time domestic employees (FTE)

What happens when employers don't make it to the stage of adding FTEs??

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Proactive Growth Strategies: Sitting Still Is Not An Option!

- Support regional education & training efforts by **getting involved in the pipeline**
- Support **regional infrastructure** investments
- Create an **entrepreneurial environment**
- Consider **outsourcing non-core business activity**
- **Expand supply chain globally via Internet B2B**
- Investigate **foreign markets, distributors**

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Lots of Strategies... (part 2)

- **Extend your reach** with web based marketing
- **Expand business segments** to include services
- Consider high deductible, **H.S.A health plans**
- Explore **alternative labor supply/staffing options**
- Implement an **Employer of Choice** philosophy
- Explore **collaborative business activities** with competitors and support networks within a cluster

LMCI On-line Information Resources

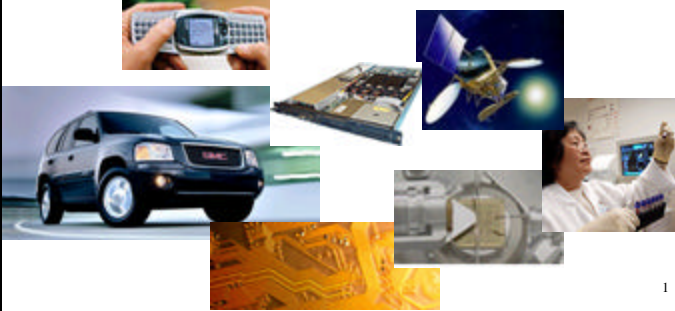
- www.texaswages.com
- www.texasindustryprofiles.com
- www.tracer2.com
- www.iOSCAR.org
- <http://socrates.cdr.state.tx.us>
- www.cdr.state.tx.us
- www.cdr.state.tx.us/realitycheck
- www.workintexas.com

Engines of the Texas Economy: Industry Cluster Initiative **Maria Smith**

Slide 1

Engines of the Texas Economy
Industry Cluster Initiative

Advanced Technology & Manufacturing
Wednesday April 20th, 2005
North & East Texas



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Slide 2


Agenda

Welcome and Introductions	Host	5 minutes
Introduction to Industry Initiative	Texas Workforce Commission	10 minutes
Facilitated Session - S.W.O.T.	Participants	45 minutes
Final Analysis on Findings	Participants	15 Minutes
Question and Answer Period	Participants	5 Minutes

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Engines of the Texas Economy



“This cluster initiative is important because for the first time in the history of this state, we will have a coordinated, market-driven economic development strategy that focuses on areas where we have the greatest growth potential and focuses on fostering that potential.”

Rick Perry, Governor of Texas

- **Clusters are comprised of collaborating and competing interests in close proximity to one another around a common economic advantage, increasing community wealth and business advantage.**
 - Energy
 - Refining / Chemicals
 - Aerospace / Defense
 - Information Technology
 - Biotechnology / Life Sciences
 - Advanced Manufacturing
- **A successful cluster strategy requires the identification of strengths and weaknesses around capital, human resources, infrastructure, science and innovation.**

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What is the purpose of today’s meeting?

This group will offer opinions and professional expertise about the profile and needs of the Advanced Technology & Manufacturing cluster in the North & East Texas region.

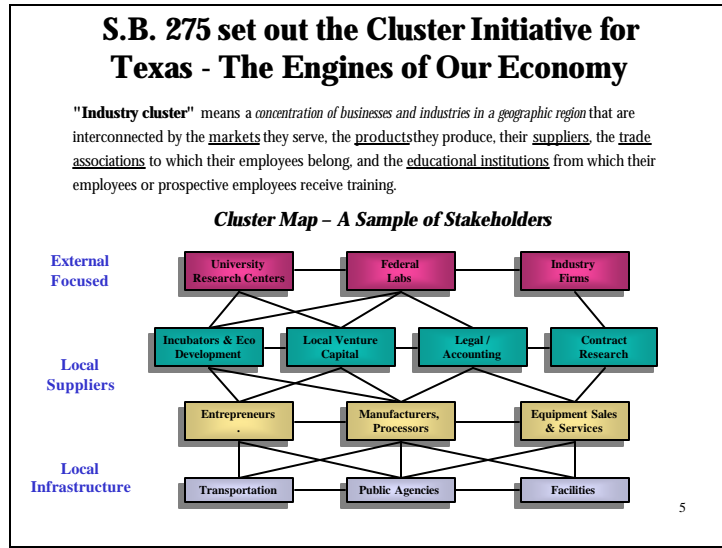
We are here:

- || → To discuss regional issues and resources
- || → Identify regional strengths and needs
- || → Profile the Advanced Technology & Manufacturing cluster in the North & East Texas region
- || → To develop a long range plan to strengthen the industry

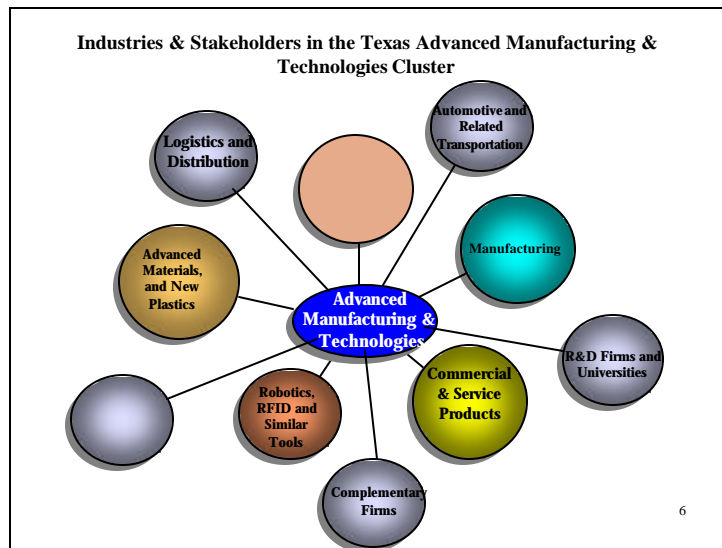
*** Information captured in these discussions will be included in the assessment of the Advanced Technology & Manufacturing cluster.**

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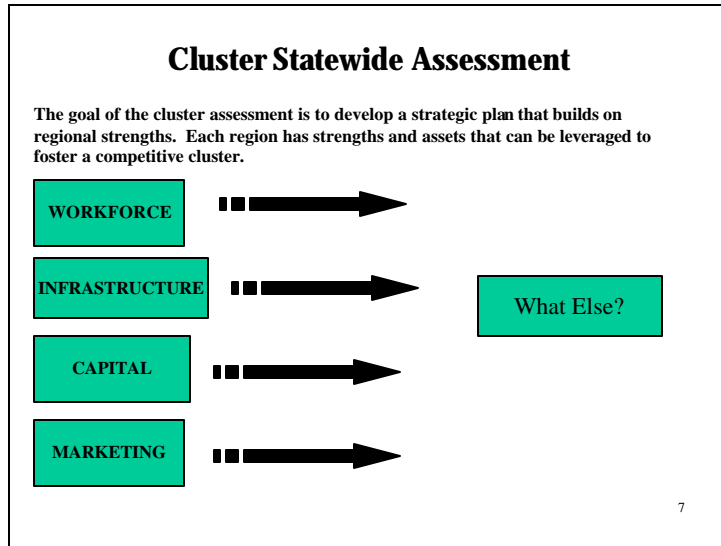
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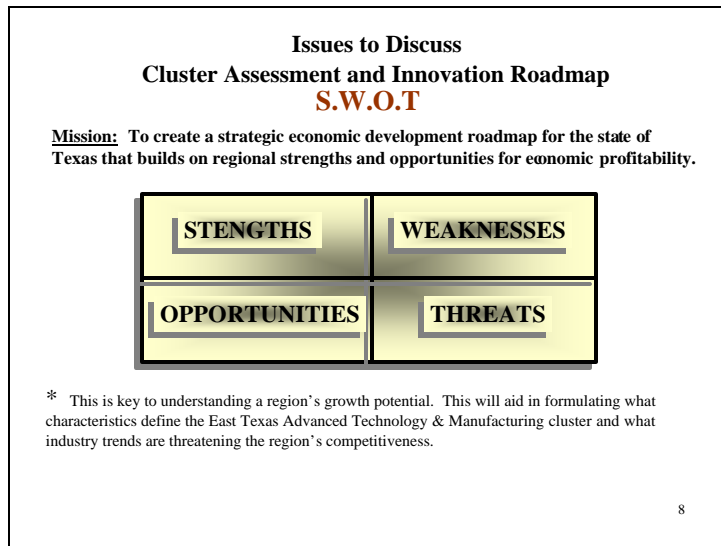
Slide 6



Slide 7



Slide 8



Slide 9

Cluster Analysis - Advanced Tech & Manufacturing Strengths & Weaknesses

<p>Strengths :</p> <ul style="list-style-type: none">• A highly skilled and available technically trained workforce is ready and able to meet employer needs• Strong university and college base. Programs in logistics, technicians, management. 7 community colleges, 4 universities.• OEM base. Trane, Brookshires, PizzaHut, Target, KellyTires, Carrier, Stemco, DoD. Attracts investment, creates, jobs, suppliers, and vendors.• Infrastructure - broadband, transportation, logistics. DFW Airport.• Location. Central time zone, NAFTA.• Branded metro area for business friendly environment. Site Selection Magazine.• Incubator - Athens, TX.	<p>Weaknesses :</p> <ul style="list-style-type: none">• No strong branding/marketing for East Texas.• University system hinders partnerships. Need commercialization of products and collaboration with industry.• Global competition is redefining manufacturing. East Texas has not been able to leverage their strengths to attract businesses and new tech.• Economic Development needs statewide vision. Regions receive even resources to compete.• Need higher numbers of graduates in engineering, etc ...• Lack of machining programs. Need investment in vocational training.• Disconnects b/w high school and 2nd education institutions.• Lack of seed and Venture Capital.
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Slide 10

Cluster Analysis - Advanced Tech & Manufacturing Opportunities & Threats

<p>Opportunities:</p> <ul style="list-style-type: none">• Technology drives the future of industry, regardless of sector. Manufacturing is changing and industry leaders have the opportunity to leverage East Texas.• Skilled and experienced workforce for the development of entrepreneurial ventures. Dollars are brought in to region by retirees, successful industry professionals.• Proposed legislation for Centers of Innovation offer an excellent opportunity to focus resources• An increased link between individuals, universities, colleges, training and life-long learning could ensure an evolving workforce that is already strong.• Creation of a strategic Economic Development map will encourage all regions to work together.• Leverage growing foundation in Health Sciences, biotechnology.• Call centers.	<p>Threats:</p> <ul style="list-style-type: none">• Texas communities need to stop competing with each other and join together to face other states and nations.• Texas will lose key companies and talent if priorities are not identified and funded. Need incentives to keep companies in East Texas.• Brain Drain. Graduates leave East Texas for better opportunities.• Borders - AR, OK, LA. Surrounding states offer Economic Development incentives, compete for workforce.• Legislation must support manufacturing and distribution centers in Texas (taxes, competitive salaries, infrastructure).
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In Conclusion.....

Texas' success in this cluster will be the result of strong participation from the private sector, universities, government, and economic development agencies. In order to build this strong base, we need to understand what are the most important needs and strengths of the East Texas region.

Main Points from Discussion:

- 1)
- 2)
- 3)
- 4)

*Thank you for your participation.
Maria Smith
maria.smith@twc.state.tx.us*

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**Texas Manufacturing Assistance Center
Drew Casani**



Complete Manufacturing Solutions

To maintain a competitive edge in today's business environment, manufacturers can now take advantage of expertise and assistance offered by the Texas Manufacturing Assistance Center (TMAC).

Manufacturing longevity and success depend on profitability and productivity. TMAC works with manufacturers to improve their competitiveness by identifying opportunities and implementing appropriate solutions.

TMAC provides objective, credible solutions to today's challenges with the bottom line of Texas manufacturers in mind.

TMAC serves as a technical and business resource to:

- Streamline manufacturing processes
- Optimize factory operations
- Integrate today's technology
- Facilitate vendor contacts
- Increase global competitiveness
- Enhance work force development

TMAC provides services to a wide range of industries such as metalworking, food processing, electronics, plastics, apparel and more.

TMAC Office Locations

TMAC has seven regional offices and six field locations serving the entire state of Texas. Manufacturers can access the expertise of the whole TMAC network by contacting their local office or the main toll-free number at 1.800.625.4876, or via [email](#).

<p><u>TMAC Gulf Coast</u> University of Houston 815 TMAC Building Houston, TX 77204-6023 832.842.7043</p>	<p><u>TMAC Metroplex</u> The University of Texas at Arlington Automation & Robotics Research Institute 7300 Jack Newell Blvd., South Fort Worth, TX 76118 817.272.5922</p>	<p><u>TMAC Paso del Norte</u> The University of Texas at El Paso Institute for Manufacturing and Materials Management 500 W. University Ave. Metallurgy 305 B El Paso, TX 79968 915.747.TMAC (8622)</p>
<p><u>TMAC South Central</u> Southwest Research Institute 6220 Culebra Road San Antonio, TX 78238 210.522.5717</p>	<p><u>TMAC South Texas</u> The University of Texas Pan American 1201 W University Dr. Edinburg, TX 78539-2999 956.316.7011</p>	<p><u>TMAC Statewide</u> Texas Engineering Extension Service (TEEX) The Texas A&M University System 301 Tarrow College Station, TX 77840-7896 800.625.4876</p>
<p><u>TMAC West Texas</u> Texas Tech University 2579 S. Loop 289, Suite 114 Lubbock, TX 79423 806.745.7926</p>	<p><u>Business Operations</u> 3415 Greystone Dr., Suite 104 Austin, TX 78731 800.625.4876</p>	

The Promise and Challenge of Competitive Advantage

April 20, 2005 Northeast Texas Community College - Mount Pleasant, Texas

ATTENDEES

First Name	Last Name	Business	Address	City	State	Zip	Telephone
Linda	Baxter	USDA Rural Development	1809 Ferguson Road, Ste. E.	Mt. Pleasant	TX	75455	(903) 572-5411
Amanda	Black-Keeney	International Paper Company	P.O. Box 870	Texarkana	TX	75504	(903) 796-1522
Jana	Bowers	Northeast Texas Community College	P. O. Box 1307	Mt. Pleasant	TX	75456	(903) 572-1911
Dr. Barbara	Buchanan	Panola College	1109 West Panola	Carthage	TX	75633	(903) 693-2000
Pat	Carr	Mount Pleasant Chamber of Commerce	1604 N. Jefferson	Mt. Pleasant	TX	75455	(903) 572-8567
Drew	Casani	TMAC	7300 Jack Newell Blvd. S.	Ft. Worth	TX	76118	(817) 272-5922
Don	Chamlee	Day and Zimmerman, Inc.	Hwy 82 West	Texarkana	TX	75501	(903) 334-1210
Marjorie	Chandler	Congressman Hall	710 James Bowie Dr	New Boston	TX	75770	(903) 628-8309
Nigel	Christopher	Dekoron Wire & Cable	1300 Industrial Road	Mt. Pleasant	TX	75455	(903) 572-3475
Kelly	Coke	Senator John Cornyn	100 E. Ferguson St., # 1004	Tyler	TX	75702	(903) 593-0902
Julie	Collins	JCM Industries	200 Old Boston Road	Nash	TX	75569	(903) 832-2581
Ron	Collins	JCM Industries	200 Old Boston Road	Nash	TX	75569	(903) 832-2581
Melissa	Conklin	Tyler EDC	P.O. Box 2004	Tyler	TX	75710	(903) 593-2004
Linda	Crawford	Texarkana Chamber of Commerce	819 North State Line	Texarkana	TX	75501	(903) 791-2179
Rolando	De LaPena	Campbell Soup Company	P.O. Box 9016	Paris	TX	75461	(903) 737-2364
Emily	Dempsey	PJ Trailer Manufacturing	1807 FM 2353	Sumner	TX	75486	(903) 785-6879
Joshua	DuBois	Amsco Steel Co.	3430 McCart Avenue	Ft. Worth	TX	76110	(817) 922-3917
Mary	Duckert	North East Texas Workforce Board	911 N. Bishop Bldg. A	Wake Village	TX	75501	(903) 794-9490
Ray	Dunbar	North East Texas Workforce Centers	West Ferguson Rd.	Mt. Pleasant	TX	75456	(903) 572.9841
Amy	Durbin	NexFor Norbord Jefferson OSB Plant	500 NexFor Blvd.	Jefferson	TX	75657	(903) 665-5818
Bill	Elliott	City of Sulphur Springs Chamber of Commerce	1200 Houston Street	Sulphur Springs	TX	75483	(903) 885-6515
Richard	Froeschle	Texas Workforce Commission	101 East 15th Street	Austin	TX	78778	(512) 491-4941
Shayne	Giese	JCM Industries	200 Old Boston Road	Nash	TX	75569	(903) 832-2581
Cynthia	Goerke	JCM Industries	200 Old Boston Road	Nash	TX	75569	(903) 832-2581
Gail	Green	Senator John Cornyn	100 E. Ferguson St., # 1004	Tyler	TX	75702	(903) 593-0902
Dr. Doug	Green	Texas A&M University -Texarkana	2600 North Robison Road	Texarkana	TX	75501	(903) 223-3100
Larry	Hamilton	North East Texas Workforce Centers	West Ferguson Rd.	Mt. Pleasant	TX	75456	(903) 572.9841
Jimmye	Hancock	Paris Junior College	2400 Clarksville Street	Paris	TX	75460	(903) 838-4541
Bradley	Hardin	AEP/SWEPCO	3708 W. 7th Street	Texarkana	TX	75501	(903) 223-5880
Steve	Harris	H & H Developers/Builders	311 Glenway	Nash	TX	75569	(903) 832-6338
Charlie	Hodges	Paris Junior College	2400 Clarksville Street	Paris	TX	75460	(903) 785-7661

The Promise and Challenge of Competitive Advantage

April 20, 2005 Northeast Texas Community College - Mount Pleasant, Texas

ATTENDEES

First Name	Last Name	Business	Address	City	State	Zip	Telephone
Wendell	Holcombe	East Texas Workforce Board	3800 Stone Road	Kilgore	TX	75662	(903) 984-8641
Judy	Jackson	Northeast Texas Community College	P. O. Box 1307	Mt. Pleasant	TX	75456	(903) 572-1911
Kristi	Johnson	WePack Logistics	2510 South Church St.	Paris	TX	75460	(903) 737-0522
Karl	Kerr	Five Star Industrial Group, LLC	P.O. Box 39	Lake Creek	TX	75450	(903) 785-0999
Susan	Kerr	Five Star Industrial Group, LLC	P.O. Box 39	Lake Creek	TX	75450	(903) 785-0999
Dr. Terry	Land	Mayo Manufacturing Company	4101 Terry Street	Texarkana	TX	75501	(903) 838-0518
Cynthia	Laney	City of Pittsburg	200 Rusk Street	Pittsburg	TX	75686	(903) 856-3621
Duane	Lavery	Red River Redevelopment Authority	107 Chapel Lane	New Boston	TX	75570	(903) 223-9841
Commissioner Ron	Lehman	Texas Workforce Commission	101 East 15th Street	Austin	TX	78778	(512) 463-2826
Marie	Martin	Rep. Stephen J. Frost	P.O. Box 248	New Boston	TX	75570	(903) 628-8466
David	McAnnally	Paris Junior College	2400 Clarksville Street	Paris	TX	75460	(903) 838-4541
Rickey	McFadden	Paris Junior College	2400 Clarksville Street	Paris	TX	75460	(903) 785-7661
Jim	McFee	International Paper Company	P.O. Box 870	Texarkana	TX	75504	(903) 796-1401
Gary	McKinley	Wood County Industrial Commission	P.O. Box 578	Quitman	TX	78783	(903) 763-4831
Craig	Miller	Ocean Spray Cranberries, Inc.	419 East Industrial Drive	Sulphur Springs	TX	75504	(903) 885-8676
Judy	Narramore	TXU Mining	P.O. Box 1636	Mt. Pleasant	TX	75456	(903) 577-5105
Scott	Norton	Texarkana College	2500 N. Robison Road	Texarkana	TX	75501	(903) 838-4541
Kay	O'Dell	North East Texas Workforce Board	911 N. Bishop Rd., Bldg. A	Wake Village	TX	75501	(903) 794-9490
Ann	Peters	PJ Trailer Manufacturing	1807 FM 2353	Sumner	TX	75486	(903) 785-6879
Richard	Powell	Ark-Tex Council of Governments	P.O. Box 5307	Texarkana	TX	75505	(903) 832-8636
Bill	Priefert	Priefert Manufacturing Company	P.O. Box 1540	Mt. Pleasant	TX	75456	(903) 572-1741
Jan	Ragland	Traylor Farms	Not Available				
Debbie	Rainey	Ark-Tex Council of Governments	P.O. Box 5307	Texarkana	TX	75505	(903) 832-8636
Travis	Ransom	Senator Kevin P. Eltife	5411 Plaza Drive, Suite D	Texarkana	TX	75503	(903) 223-7931
Randy	Reed	North East Texas Workforce Board	911 N. Bishop Rd., Bldg. A	Wake Village	TX	75501	(903) 794-9490
Commissioner Hermon E.	Reed, Jr.	Panola County Courthouse	110 S. Sycamore Room 102A	Carthage	TX	75633	(903) 693-0385
Larry	Roberts	Paris Junior College	2400 Clarksville Street	Paris	TX	75460	(903) 838-4541
Kevin	Rose	Northeast Texas Community College	P.O. Box 1307	Mt. Pleasant	TX	75456	(903) 572-1911
Aubrey	Sharpe	Tyler Junior College	1327 South Baxter Avenue	Tyler	TX	75701	(903) 510-2200
James	Shaw	East Texas Workforce Board	3800 Stone Road	Kilgore	TX	75662	(903) 984-8641

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ATTENDEES

First Name	Last Name	Business	Address	City	State	Zip	Telephone
Katherine	Smith	Colt Technologies	12900 Preston Road, Ste. 777	Dallas	TX	75230	(903) 385-7770
Jerry	Smith	Day and Zimmerman, Inc.	Highway 82 West	Texarkana	TX	75505	(903) 334-1210
Charles	Smith	Mount Pleasant Industrial Foundation	P.O. Box 1237	Mt. Pleasant	TX	75456	(903) 572-6602
Maria	Smith	Texas Workforce Commission	101 East 15th Street	Austin	TX	78778	(512) 944-3488
Jerry	Sparks	Texarkana Chamber of Commerce	P.O. Box 1468	Texarkana	TX	75504	(903) 792-7191
Lynne	Spivey	Atlanta City Development Corporation	P.O. Box 908	Atlanta	TX	75551	(903) 796-6041
Bobby	Stone	WePack Logistics	2510 South Church St.	Paris	TX	75460	(903) 737-0522
Dr. Tom	Talley	Texas A&M University-Texarkana	2600 North Robison Road	Texarkana	TX	75501	(903) 223-3100
Patrick	Taylor	TXU Mining	P.O. Box 1636	Mt. Pleasant	TX	75456	(903) 572-5028
Jeff	Teague	Alcoa Mill Products	300 Alumax Dr	Texarkana	TX	75501	(903) 832-8471
Jake	Thiessen	Load Trail, Inc.	2097 FM Road 2352	Sumner	TX	75486	(903) 784-8719
Larry	Tomasetti	North East Texas Workforce Centers	1118 Wood Street	Texarkana	TX	75501	(903) 794-4163
Kelley	Townsend	Upper East TX Tech Prep.	2400 Clarksville Street	Paris	TX	75460	(903) 838-4541
Sabrina	Townsend	International Paper Company	P. O. Box 870	Texarkana	TX	75501	(903) 796-7101
Carol	Trumble	Texarkana Chamber of Commerce	819 North State Line	Texarkana	TX	75501	(903) 791-2179
David	Waite	Texas State Technical College	P.O. Box 1269	Marshall	TX	75671	(903) 923-3250
Jeanne	Wesley	Texas State Technical College	P.O. Box 1269	Marshall	TX	75671	(903) 923-3250
Robbye	White	Paris Junior College	2400 Clarksville Street	Paris	TX	75460	(903) 838-4541
Martha	Woodruff	Kilgore College	1100 Broadway	Kilgore	TX	75662	(903) 983-8287
Stephen	Yellin	CHM2 Hill (Lockwood Greene)	14901 Quorum Dr	Dallas	TX	75245	(972) 991-5505