

**TRENDS IN JOB OPPORTUNITIES FOR
MID-MARYLAND WELFARE RECIPIENTS:
Including divergent trends in Temporary Cash
Assistance (TCA) and Supplemental
Nutrition Assistance Program (SNAP) caseloads**

Anne Arundel County, Baltimore City, Baltimore County,
Montgomery County and Prince George's County

Submitted to:

Office of Programs
Family Investment Administration
Maryland Department of Human Resources
311 West Saratoga Street
Baltimore, MD 21201-3521

Submitted by:

David W. Stevens
The Jacob France Institute
University of Baltimore
1420 North Charles Street, BC-368
Baltimore, MD 21201-5779
dstevens@ubalt.edu
410-837-4729

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1.0 INTRODUCTION

This report is the eighth in a series of Jacob France Institute (JFI) technical assistance reports that document local differences in the ratio¹ of welfare recipients to business hires.² These updated estimates can improve local Department of Social Services staff understanding of job-finding prospects for work-eligible welfare recipients.

This report updates three important policy-relevant trend figures first introduced in the 2009-2010 report in the series: County-specific trends³ (July 2006-March 2012) in the ratio of TCA recipients to business hires, of TCA recipients, and of SNAP recipients, are presented and discussed. This time coverage spans pre-recession, recession and post-recession economic conditions.

Differences in local labor market opportunities for work-eligible welfare recipients are important because the February 2008 *Reauthorization of the Temporary Assistance for Needy Families (TANF) Program; Final Rule*⁴ defined personal responsibility and serious effort to work expectations for work-eligible welfare recipients. No recognition was given to local differences in labor market

¹ The **ratio** of welfare—temporary cash assistance (TCA)—recipients (numerator) to hire transactions (denominator), as each term is defined in this report, is a convenient way to show local differences in hiring prospects. A ratio value > 1 means there are more welfare recipients than hires. A ratio value < 1 indicates that there are more hires than welfare recipients.

² The previous seven reports in this series are: David W. Stevens (2006), *New Information to Promote Successful Job Search by Temporary Cash Assistance Recipients*, Baltimore, MD: The Jacob France Institute, University of Baltimore, 18 pp. (available at <http://www.ubalt.edu/jfi>); David W. Stevens (2007), *Maryland Local Departments of Social Services Face Different Job Opportunity Challenges When Assisting Work-Eligible TCA Recipients to Find Employment*, Baltimore, MD: The Jacob France Institute, University of Baltimore, 13 pp. (available at <http://www.ubalt.edu/jfi>); Jane Staveley and David W. Stevens (2008), *Mid-State Differences in Job Opportunities for Maryland Welfare Recipients*, Baltimore, MD: The Jacob France Institute, University of Baltimore, 15 pp. (available at <http://www.ubalt.edu/jfi>); Jane Staveley and David W. Stevens (2009), *Mid-State Differences in Job Opportunities for Maryland Welfare Recipients*, Baltimore, MD: The Jacob France Institute, University of Baltimore, 15 pp. (available at <http://www.ubalt.edu/jfi>); Jane Staveley and David Stevens (2010), *Mid-State Differences in Job Opportunities for Maryland Welfare Recipients*, Baltimore, MD: The Jacob France Institute, University of Baltimore, 14 pp. (available at <http://www.ubalt.edu/jfi>); Jane Staveley and David Stevens (2011), *Pre-recession Through Post-recession Trends in Job Opportunities for Mid-Maryland Welfare Recipients: Including divergent trends in Temporary Cash Assistance (TCA) and Supplemental Nutrition Assistance Program (SNAP) caseloads*, Baltimore, MD: The Jacob France Institute, University of Baltimore, 25 pp. (available at <http://www.ubalt.edu/jfi>); and David Stevens (2012), *Trends in Job Opportunities for Mid-Maryland Welfare Recipients: Including divergent trends in Temporary Cash Assistance (TCA) and Supplemental Nutrition Assistance Program (SNAP) caseloads*, Baltimore, MD: The Jacob France Institute, University of Baltimore, 25 pp. (available at <http://www.ubalt.edu/jfi>).

³ The 2006 and 2007 reports in the series differed from the more recent releases in geographic coverage, defined age groupings and industry designations of hires included in the ratio calculations.

⁴ *Federal Register*, Volume 73, Number 24, February 5, 2008, pp. 6771-6828.

conditions that impact whether and how a commitment to personal responsibility and serious effort to work is rewarded with success.

Section 2 describes the data sources used to calculate ratios of welfare recipients to local business hires and defines three basic terms used to present the local ratio estimates—work-eligible welfare recipients, age groups and industries ranked by local private business hires of women in these age groups. The ratio estimates and trend calculations appear in Section 3. Conclusions follow in Section 4.

2.0 DATA SOURCES AND DEFINITIONS

2.1 Welfare recipient data source

An *Interagency Agreement* between the Maryland Department of Human Resources Family Investment Administration and JFI supports JFI maintenance and updating of monthly Client Automated Resource and Eligibility System (CARES)⁵ record extracts. For the new ratio calculations in this report we used data fields from the April 2010-March 2013 monthly CARES records.

2.2 Work-eligible welfare recipients

Our definition of *work-eligible* welfare recipients is female household heads ages 19-34⁶ with related children that received cash assistance in any month or combination of months between April 2011 and March 2012.⁷

Coverage of work-eligible female head-of-household welfare recipients ages 19-34 with related children is split into two age groups—ages 19-24 and ages 25-34—that align with defined age groups in the available local business hiring data described in subsection 2.4 below.

2.3 Local area coverage

The 2006 report in this series included only Baltimore City and Baltimore County.⁸ The 2007 report offered statewide coverage.⁹ The 2008, 2009, 2010, 2011, and 2012 reports contained welfare recipient to local business hires ratio estimates for five local Department of Social Services jurisdictions—Anne

⁵ The CARES is a data system maintained by the DHR Office of Technology for Human Services.

⁶ Age is defined at the time of first TCA benefit received during these 12 months.

⁷ Two parent households, disabled cases and domestic violence cases, as these are defined in a CARES data field labeled 'stratum', are excluded from this work-eligible subpopulation definition.

⁸ The 2006 report used a restricted access DVD data source that required many hours of JFI staff time to extract and work with defined local areas, so the ratio estimates were limited to these two contiguous DSS jurisdictions and a single 'core' labor market.

⁹ The 2007 report took advantage of the web-based availability of statewide hires estimates by industry, gender and age group that could easily be rank ordered for each of the 12 local Workforce Investment Board jurisdictions in Maryland.

Arundel County, Baltimore City, Baltimore County, Montgomery County, and Prince George's County. These five counties account for a high percentage of the Maryland work-eligible welfare recipient caseload. This 2013 report includes the same five-county coverage as the 2008—2012 reports.

2.4 The local business hires data source¹⁰

The Census Bureau began a new Longitudinal Employer-Household Dynamics (LEHD) Program in 1998. A Local Employment Dynamics (LED) initiative within the LEHD Program is a state-federal partnership that collects, organizes and makes accessible indicators of local labor market activity and conditions. A feature of this initiative, Industry Focus¹¹, is particularly useful to study differences and changes in local employment opportunities for welfare recipients.

January-March 2012 Industry Focus information was the most recent available when we selected indicator values to calculate local labor market differences for this report. Updates and modifications of the summary tables that appear here can be delivered with little delay as new quarterly releases of data are posted.

Eight indicators of labor market conditions are available at Industry Focus:

- | | |
|---|---|
| 1. Total employment | 2. Growth in employment |
| 3. Growth in hiring | 4. Number of new hires |
| 5. Firm job change | 6. Average monthly earnings for all workers |
| 7. Growth in average monthly earnings for all workers | 8. Average monthly earnings for new hires |

The Industry Focus online feature allows selection from the following options:

- Predefined age group (8 groups);
- Gender;
- Industry—North American Industry Classification System (NAICS)¹² sector (two-digit code) or subsector (three-digit code);

¹⁰ This subsection repeats relevant data source descriptive text and data field definitions from the 2006—2012 reports in this series; ensuring that new first-time readers of the current report have an opportunity to receive full information about the business hires data source without having to refer back to an earlier report in the series.

¹¹ The Industry Focus data are available at <http://lehd.did.census.gov>. Under Quick Links, click on Industry Focus and select from available drill-down options.

¹² See: <http://www.census.gov/epcd/naics07/naics07.xls>. In addition to the two-digit sectors and three-digit subsectors the NAICS taxonomy includes four-digit industry groups and five-digit industries and six-digit United States detail industries. The Census Bureau LEHD Program Industry Focus online site contains only two-digit and three-digit NAICS coded data.

- Geography (State, county, Workforce Investment Act local area designation, or defined metro area).

We selected number of new hires¹³ of women ages 19-24 and ages 25-34, by NAICS subsector, reported separately for Anne Arundel County, Baltimore City, Baltimore County, Montgomery County, and Prince George's County.¹⁴

2.5 The stable new hires indicator

The Census Bureau LEHD Program software detects employer-employee pairings that are sustained for three consecutive quarters— t , $t+1$ and $t+2$. Employment in the middle quarter, $t+1$, of a three-quarter series is defined as a stable employment observation.¹⁵ If the same employer-employee pairing is not found for the $t-1$ quarter—the quarter before quarter t —this is defined as a hire event in quarter t . The label new hire is added to indicate when an employee counted as a hire in quarter t had not been reported as an employee by the same employer in any of the three quarters prior to $t-1$; that is, $t-2$, $t-3$ and $t-4$.

We summarize the previous paragraph—a stable new hire occurs when an employee begins work in reference quarter t and then is reported by the same employer as still being employed in both quarter $t+1$ and quarter $t+2$. Our intent here is to focus attention on mutually satisfied employers and employees—those that have maintained their paired status for more than three months.¹⁶ Employee churning—frequent turnover after little time on the job—is not included in the ratio estimates presented in this report.

2.6 The unachievable ideal and the available substitute

Ideally, for a defined date, we would like to be able to compare an exact count of local work-eligible welfare recipients with an exact count of local job openings that satisfy practical access and candidate qualification criteria. Such job opening and access information is not available.

By definition a job opening is unfilled. We do not know what combination of candidate attributes, worksite location and job descriptors may hypothetically

¹³ The official Industry Focus indicator label is 'new hires', but caution is urged—the actual value that is reported at Industry Focus is number of **stable** new hires, not all new hires.

¹⁴ The 2006 report included different age groups—ages 19-34 and ages 35-54—and NAICS industry group (four-digit) detail. The 2007 report included a single age group, ages 25-34, and NAICS subsector (three-digit) detail. The 2008-2012 reports included the same two age groups as the current report.

¹⁵ This label of stable employment cannot be assigned to the first or third quarters in the three-quarter sequence without additional information about the existence of the employer-employee pairing in the quarter preceding the first quarter or the quarter following the third quarter.

¹⁶ A person could begin work on the last day of quarter t and be reported as employed by the hiring employer for that quarter, then continue through all of quarter $t+1$ and be reported as employed for a second consecutive quarter, and finally work one day in quarter $t+2$ and leave for another job or activity but be reported as employed for the third consecutive quarter.

result in a successful hire—a combination that satisfies both the employer and the job applicant.

There is no consensus about what access means, exemplified by ongoing commuter responses to fluctuating fuel prices. Individuals respond in unpredictable ways to distance, time, out-of-pocket costs, and changes in these attributes of access.

In this report we substitute Industry Focus stable new hires information organized by county, industry subsector, age group and gender for the unmeasured exact count of local job openings that satisfy practical access and candidate qualification criteria.

Table Methodology

This report presents: Four single-year data tables (April 2011-March 2012); two trend tables (July 2006-March 2013); five county-specific graphs, showing each county's TCA and SNAP trend calculations for ease of understanding; and two figures showing the respective TCA and SNAP caseload trends for each of the five mid-Maryland counties for ease of comparisons among the five counties:

- Table 1—Ranking of top 10 industries¹⁷ based on average quarterly local stable new hires, April 2011-March 2012, women ages 19-34 for each of five counties.
- Table 2—Average quarterly number of local stable new hires, April 2011-March 2012, in top 10 ranked industries, women ages 19-34 for each of five counties.
- Table 3—Ratios of work-eligible TCA women ages 19-34 to sum of top 10 local industry subsector stable new hires and to all local industry subsector stable new hires. Both ratios are age group-specific and represent averages over April 2011-March 2012. Ratio numerator and denominator definitions and time alignment assumptions are explained in Section 3.3.
- Table 4 -- Trends in Top 10 Hires Ratios of Work-Eligible TCA Women Ages 19-34 July 2006-March 2012
- Figure 1— TCA & SNAP: Paid Cases, Paid Recipients (Adults & Children) July 2006-May 2013

¹⁷ NAICS subsector (three-digit) designations.

- Figure 2— Trends in Top 10 Hires Ratios of Work-Eligible TCA Women Ages 19-24, and Ages 25-34, July 2006-March 2012
- Figure 3— TCA Paid Cases, Paid Recipients (Adults & Children) July 2006-May 2013
- Figure 4— SNAP Paid Cases, Paid Recipients (Adults & Children) July 2006-May 2013

Each of the four numbered series tables appears in the five county-specific section for ease of comparison between the two age groups and among the five counties. The progression from Table 1, through Table 2 and Table 3, to Table 4 answers four questions in a logical sequence.

1. Table 1 answers the question: What is the county-specific top 10 ranking of local industry subsectors based on number of stable new hires of women in a defined age group?
2. Table 2 answers the question: How many county-specific stable new hires of women in a defined age group were there in an average quarter from April 2011 to March 2012 in each of these ranked industry subsectors?
3. Table 3 answers the question: What are the county-specific ratios of work-eligible welfare recipients to: (1) the sum of local stable new hires of women in the top 10 ranked industry subsectors; and (2) the sum of all local industry subsector stable new hires?
4. Table 4 answers the question: What are the county-specific trends for the ratios of work-eligible welfare recipients to the sum of local stable new hires of women in the top 10 ranked industry subsectors?

Table 1 Methodology
Top 10 industry subsectors ranked based on local stable new hires

Table 1 shows industry subsectors (three-digit NAICS codes and titles) ranked 1 through 10 based on county average quarterly stable new hires of women ages 19-24 from April 2011 through March 2012. This table, and Table 1(b) in the lower half of the same page for women ages 25-34, includes a combined 16 NAICS industry subsector codes.

A combined total of 16 three-digit 2007 North American Industry Classification System (NAICS) industry subsector codes appear in Table 1(a) and Table 1(b):

- 445—food and beverage stores
- 446—health and personal care stores
- 448—clothing and clothing accessories stores
- 452—general merchandise stores
- 453—miscellaneous store retailers
- 522—credit intermediation and related activities
- 541—professional, scientific, and technical services
- 561—administrative and support services
- 611—educational services
- 621—ambulatory health care services
- 622—hospitals
- 623—nursing and residential care facilities
- 624—social assistance
- 721—accommodation
- 722—food services and drinking places
- 812—personal and laundry services
- 813—religious, grant-making, civic, professional, and similar organizations

The 16 pairings of NAICS industry subsector codes indicate that the age-specific county rankings based on local stable new hires are not identical. If the rankings were uniform only 10 NAICS codes would appear in the combination of Table 1(a) and Table 1(b). Actually, 13 of the 16 three-digit NAICS codes appear in the top 10 ranking of stable new hires for both age groups. Code 446 (health and personal care stores) appears only in the top 10 list of stable new hires for the younger age group (ages 19-24), and code 721 (accommodation) and code 813 (religious, grant making, civic, professional, and similar organizations) appears in the top 10 ranking of stable new hires for only the women in the older age group (ages 25-34).

The Table 1 rankings should be heeded by local DSS staffs charged with carrying out the February 2008 *Final Rule* personal responsibility and serious effort to work expectations. A work-eligible TCA recipient's age and location should be considered in targeting local office assistance.

Table 2 Methodology

Number of local stable new hires by ranked top 10 industries

The format of Table 2 is the same as the format for Table 1, described on page 6-7, except that each row-column cell number in the new tables on page 10 is a local average quarterly stable new hires estimate for the industry subsector in the same row-column cell of the previous table.

A five-county comparison of stable new hires profiles for the top 10 ranked industry subsectors within Table 2 shows interesting similarities and differences. Table 2 provides a comparison, looking at the last column reading from left to right, labeled *sum*, that shows there are clear age-related differences in the average quarterly sum of top 10 ranked industry subsector stable new hires. Again, the message for local DSS staffs is that age and location matter in targeting promising industries for work-eligible TCA recipient action.

Table 3 Methodology

Ratios of work-eligible welfare recipients to: (1) summed local stable new hires in ranked top 10 industry subsectors; and (2) all industry subsectors

Numbers from different sources are brought together next and transformed into clear indicators of local differences in job opportunities for female work-eligible welfare recipients¹⁸. Table 3 shows two distinct types of

¹⁸ Our phrase “job opportunities for female work-eligible welfare recipients” requires elaboration. The hires numbers we present in this report are defined by location (county), gender (female), age group (ages 19-24 or ages 25-34) and industry subsector (NAICS three-digit). Our decision to compare these hires figures to a count of female work-eligible welfare recipients in the same age ranges implicitly assumes that current and future job opportunities for these work-eligible designees are defined by and only by the local business affiliations of April 2011-March 2012 new hires of women in the same age spans. Unobserved forces work in opposite directions to influence the relevance of our hires estimates for local DSS staff actions. Our hires figures understate local job opportunities for female work-eligible welfare recipients if these welfare recipients can successfully compete for local jobs not previously held by women in the same age range. But our hires figures overstate local job opportunities for female work-eligible welfare recipients if some of the local jobs previously held by women in the same age range are not realistic opportunities because of unobserved differences—such as lower educational attainment, substance abuse history, criminal conviction, and less favorable previous employment profile. There is no occupational descriptor in the Industry Focus data source, so we do not know the occupational distribution of 2011-2012 hires of women in mid-Maryland. Another source of overstatement is that our ratio calculation assumes that the female work-eligible welfare recipients compete for job offers only among themselves, not with the unobserved larger pool of other women and men that compete for the same jobs. Other considerations include: (1) our hires figures in this report cover only private business hires, but we know that a substantial number of local government jobs are held by or potentially available to women; and (2) there is some measurement error of unknown size in the assignment of business hire transactions to a defined location. We do not think that these warnings should cause local DSS staffs to ignore the targeting implications of our Table 3 findings.

difference relevant for DSS local office targeting of job opportunities for welfare recipients:

- Differences between age groups within a local area; and
- Differences among local areas within an age group.

The following steps were used to calculate the ratio number in Table 3 column 5:

- The ratio numerator calculation started with the column 1, which is the unduplicated count of county-specific female work-eligible welfare recipients ages 19-24, from April 2011 through March 2012. This count over 12 months is intended for alignment with quarterly business hires data to answer the question: How many relevant local hires is a work-eligible recipient 'exposed' to during her TCA benefit spell(s)?
- For this report we assume an average TCA benefit duration of six months between March 2011 and April 2012, so we divided the year-long count of recipients by 2 to arrive at a six-month estimate of work-eligible female welfare recipients ages 19-24—the derived number does not appear in Table 3. This number is the numerator value used to calculate the Table 3 row 1 column 5 ratio result.
- To calculate the denominator value of the Table 3 row 1 column 5 ratio our next step was to start with the Table 3 row 1 column 2 number, which is the sum of top 10 industry subsector average quarterly stable new hires from April 2011 through March 2012. This is a quarterly value, but we need a six-month denominator number that aligns with the numerator six-month derived estimate of work-eligible female welfare recipients. So we multiplied the average quarterly stable new hires number by 2 to arrive at a six-month estimate of top 10 industry subsector stable new hires of women ages 19-24.
- Our third and final step to arrive at the Table 3 row 1 column 5 ratio value was to divide the derived numerator number by the derived denominator number.

As we stated on page 1 footnote 1, a ratio value < 1 indicates that there were more stable new hires in the defined industry subsectors of women ages 19-24 or 25-34 than the estimated count of female work-eligible welfare recipients in the same age group, given the cautions we describe on page 8, footnote 18.

Each of the remaining ratio values shown in columns 5 and 6 of Table 3 were calculated following the same sequence of steps described above. The difference between columns 5 and 6 in both tables is the scope of industry subsector coverage—column 5 includes only the top 10 ranked industry subsector stable new hires, while column 6 includes all industry subsectors. Our ratio definitions mean that the derived ratio in column 6 of a row must be lower than (or equal to because of rounding) the column 5 ratio value because the column 6 denominator value is larger, including all industry subsector stable new hires.

Table 4 Methodology
Trends in county-specific top 10 stable new hires ratios

No new information is presented in this subsection. Information from Table 3 column 5 in all cases has been extracted from the 2008-2012 and current 2013 reports, and consolidated in Table 4 to demonstrate trends in county-specific top 10 stable new hires ratios.

Figure 1 Methodology
Trends in TCA & SNAP Paid Cases, Paid Recipients (Adults & Children)

Figure 1, showing county-specific TCA and SNAP caseload trends, displays the county-specific trends of TCA paid caseload and SNAP paid caseload to advance understanding of the growing gap between quite stable TCA caseloads and increasing SNAP caseloads. Each county-specific graphic uses a single common y-axis (vertical) scale for ease of interpretation of the TCA and SNAP trends. However, because the magnitude of the respective caseloads is so different among the five counties, the y-axis (vertical) scale differs among the five graphs—no two are the same. The substantial growth of the SNAP paid caseload over the years observed (July 2006-May 2012) is apparent for each of the counties, as is the relative stability, and much lower level, of the TCA paid caseload over the same four years.

3.0 ANNE ARUNDEL COUNTY

TABLE 1

**TOP 10 INDUSTRY (NAICS) SUBSECTORS BASED ON
AVERAGE QUARTERLY LOCAL STABLE NEW HIRES OF WOMEN AGES 19-34
ANNE ARUNDEL COUNTY**

April 2011 - March 2012

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>
19-24	722	448	452	621	561	541	445	622	812	623
25-34	722	541	621	561	622	623	452	448	624	445

Source: The Jacob France Institute, University of Baltimore, June 2013

NAICS SUBSECTORS: 445--food and beverage stores; 446--health and personal care stores; 448--clothing and clothing accessories stores; 452--general merchandise stores; 522--credit intermediation and related activities; 541--professional, scientific, and technical services; 561--administrative and support services; 611--educational services; 621--ambulatory health care services; 622--hospitals; 623--nursing and residential care facilities; 624--social assistance; 721--accommodation; 722--food services and drinking places; 812--personal and laundry services; 813--religious, grant making, civic

Table 1 shows that women ages 19-34 in Anne Arundel county, NAICS industry subsector code 722 (food services and drinking places) is ranked first. Of the top industries presented in Table 1, some are present for one age group, but not the other. Industry subsector code 812 (Religious, grant making, civic) appears for women ages 19-24, but not for women ages 25-34. Conversely, industry subsector code 624 (social assistance) appears in the top ten industries for women aged 25-34, but not for women ages 19-24. This indicates that both age groups share 90% of the top industries listed.

TABLE 2

**AVERAGE NUMBER OF QUARTERLY LOCAL STABLE NEW HIRES OF WOMEN AGES 19-34
IN TOP 10 INDUSTRY (NAICS) SUBSECTORS RANKED BY NUMBER OF LOCAL STABLE NEW
HIRES**

ANNE ARUNDEL COUNTY

April 2011 - March 2012

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>SUM</u>
19-24	384	174	128	121	112	99	78	63	61	58	1,278
25-34	221	189	187	172	99	76	68	67	61	47	1,187

Source: The Jacob France Institute, University of Baltimore, June 2013

The first row and first column cell number of Table 2 is 384. This is the quarterly average number of NAICS code 722 (food services and drinking places) stable new hires of women ages 19-24 in Anne Arundel county from April 2011 through March 2012. The quarterly average number of stable new hires of women ages 25-34 for this same category is 221.

TABLE 3						
RATIOS OF WORK-ELIGIBLE TCA WOMEN AGES 19-34 TO SUM OF TOP 10 LOCAL INDUSTRY SUBSECTOR STABLE NEW HIRES AND TO ALL LOCAL INDUSTRY SUBSECTOR STABLE NEW HIRES BOTH AGE GROUP-SPECIFIC AND AVERAGE APRIL 2011 - MARCH 2012 ANNE ARUNDEL COUNTY						
	1	2	3	4	5	6
	Work- eligible	Sum top 10	Sum of all	Column 2/ Column 3	Top 10 hires ratio	All hires ratio
	<u>TCA count</u>	<u>subsector hires</u>	<u>hires</u>			
19-24	464	1,278	1,832	70	0.09	0.06
25-34	613	1,187	1,789	66	0.13	0.09

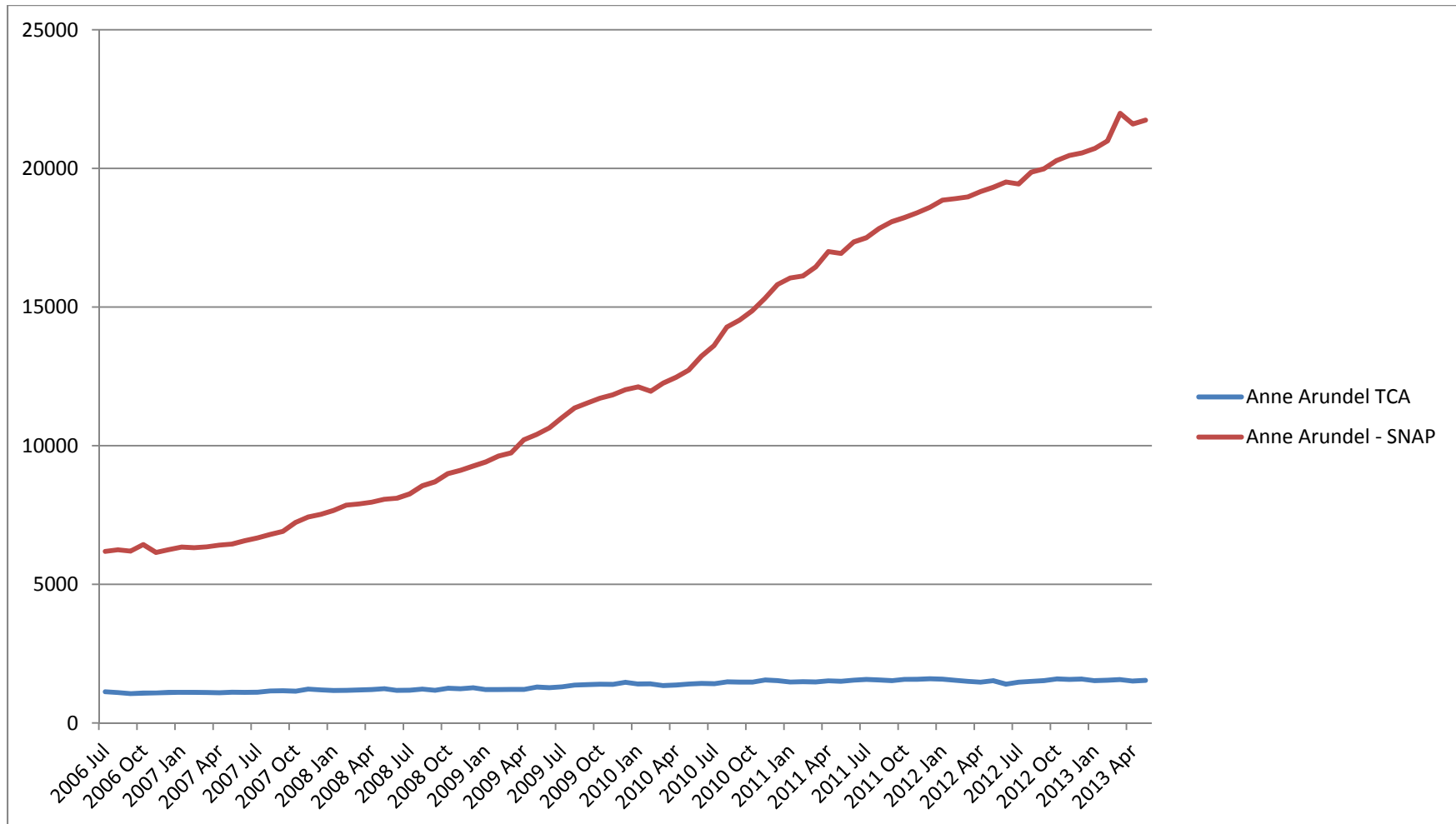
Source: The Jacob France Institute, University of Baltimore, June 2013

The Table 3 row 1 column 5 derived ratio value of 0.09 indicates that there were 11 stable new hires of women ages 19-24 in Anne Arundel County for each woman in the defined pool of local work-eligible welfare recipients. The ratio value of .13 found in Table 3 row 2 column 5 indicates that there were 11.7 stable new hires of women ages 25-34 in Anne Arundel county for each woman in the defined pool of local work eligible welfare recipients. This rate of stable new hires has also been stable since 2006, indicating that **both** age groups in Anne Arundel County are experiencing the same level of stability in terms of stable new job opportunities (see Table 4).

TABLE 4						
TRENDS IN TOP 10 HIRES RATIOS OF WORK-ELIGIBLE TCA WOMEN AGES 19-34 ANNE ARUNDEL COUNTY JULY 2006-MARCH 2012						
	July 2006 - June 2007	July 2007 - June 2008	July 2008 - June 2009	July 2009 - June 2010	April 2010 - March 2011	April 2011 - March 2012
19-24	0.07	0.07	0.08	0.10	0.10	0.09
25-34	0.07	0.09	0.09	0.11	0.12	0.13

Source: The Jacob France Institute, University of Baltimore, June 2013

**Figure 1 - TCA & SNAP: Paid Cases, Paid Recipients (Adults & Children)
July 2006 – May 2013 (Anne Arundel County)**



Source: The Jacob France Institute, University of Baltimore, June 2013

4.0 BALTIMORE CITY

TABLE 1

**TOP 10 INDUSTRY (NAICS) SUBSECTORS BASED ON
AVERAGE QUARTERLY LOCAL STABLE NEW HIRES OF WOMEN AGES 19-34
BALTIMORE CITY**

April 2011 - March 2012

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>
19-24	722	622	611	561	541	621	624	623	448	445
25-34	622	611	561	722	621	541	623	624	813	721

Source: The Jacob France Institute, University of Baltimore, June 2013

NAICS SUBSECTORS: 445--food and beverage stores; 446--health and personal care stores; 448--clothing and clothing accessories stores; 452--general merchandise stores; 522--credit intermediation and related activities; 541--professional, scientific, and technical services; 561--administrative and support services; 611--educational services; 621--ambulatory health care services; 622--hospitals; 623--nursing and residential care facilities; 624--social assistance; 721--accommodation; 722--food services and drinking places; 812--personal and laundry services; 813--religious, grantmaking, civic

Table 1 shows the NAICS industry subsector codes ranked number one for the two age groups that appear in Table 1—the first column reading from left to right. For women ages 19-24 NAICS industry subsector code 722 (food services and drinking places) is ranked first; but for women ages 25-34 the top ranking NAICS industry subsector code is 622 (hospitals), while industry subsector code 722 is ranked fourth. Industry subsector codes 448 (clothing and clothing accessory stores) and 445 (food and beverage stores) appear only in the 19-24 age group, while 813 (religious, grantmaking, civic) and 721 (accommodation) only appear in the 25-34 age group. This indicates that both age groups share 80% of the top industries listed.

TABLE 2

**AVERAGE NUMBER OF QUARTERLY LOCAL STABLE NEW HIRES OF WOMEN AGES 19-34
IN TOP 10 INDUSTRY (NAICS) SUBSECTORS RANKED BY NUMBER OF LOCAL STABLE NEW
HIRES**

BALTIMORE CITY

April 2011 - March 2012

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>SUM</u>
19-24	346	281	194	184	125	108	72	66	64	57	1,497
25-34	470	350	278	246	223	217	116	109	56	50	2,115

Source: The Jacob France Institute, University of Baltimore, June 2013

The Table 2 first row and first column cell number is 346. This is the quarterly average number of NAICS code 722 (food services and drinking places) stable new hires of women ages 19-24 in Baltimore City from April 2011 through March 2012. The quarterly average number of stable new hires of women ages 25-34 for this same category (722) is 246.

TABLE 3						
RATIOS OF WORK-ELIGIBLE TCA WOMEN AGES 19-34 TO SUM OF TOP 10 LOCAL INDUSTRY SUBSECTOR STABLE NEW HIRES AND TO ALL LOCAL INDUSTRY SUBSECTOR STABLE NEW HIRES BOTH AGE GROUP-SPECIFIC AND AVERAGE APRIL 2011 - MARCH 2012 BALTIMORE CITY						
	1	2	3	4	5	6
	Work- eligible	Sum top 10	Sum of all	Column 2/ Column 3	Top 10 hires ratio	All hires ratio
	<u>TCA count</u>	<u>subsector hires</u>	<u>hires</u>			
19-24	4,251	1,497	2,056	73	0.71	0.52
25-34	4,713	2,115	2,759	77	0.56	0.43

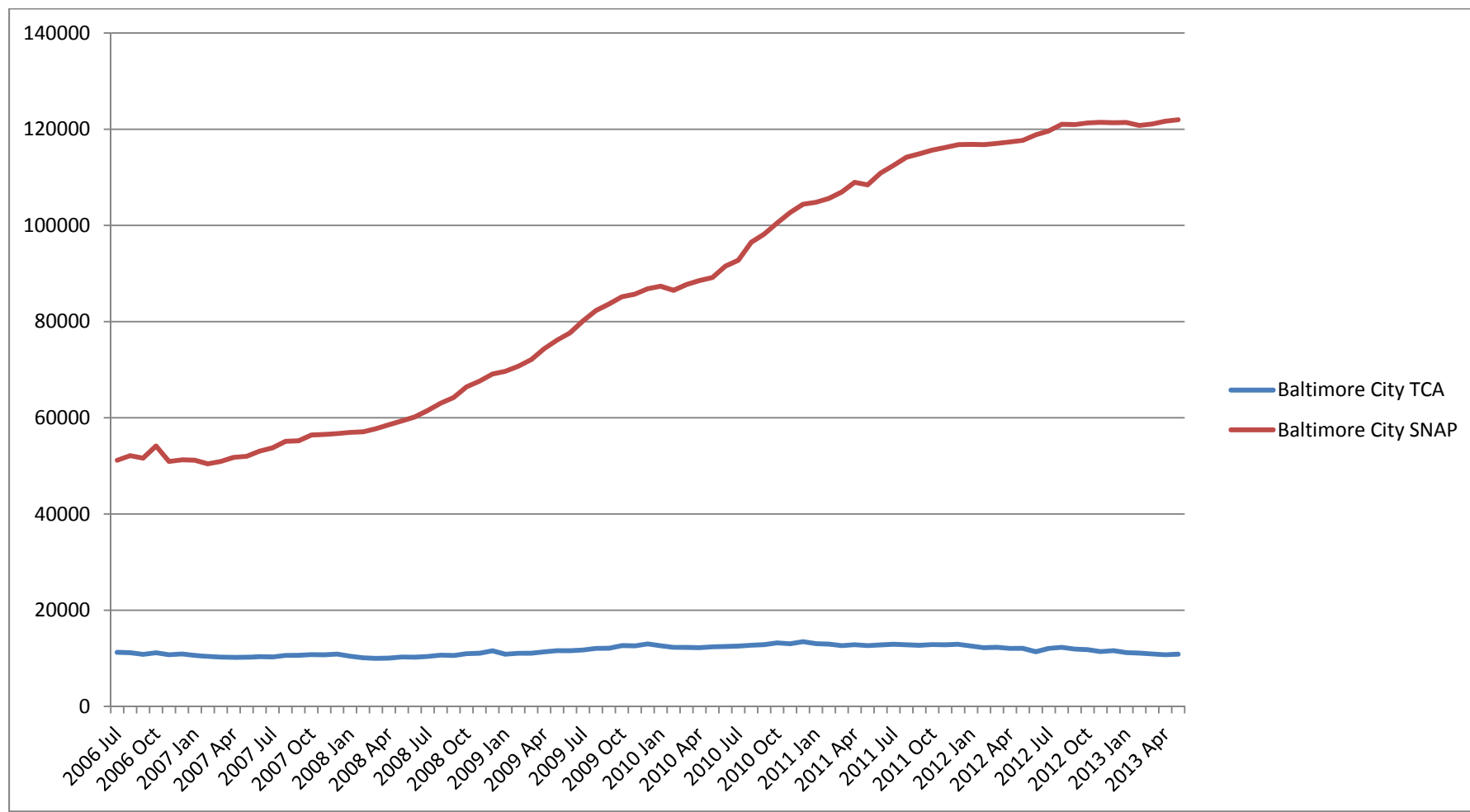
Source: The Jacob France Institute, University of Baltimore, June 2013

The Table 3 row 1 column 5 derived ratio value of 0.71 indicates that there were 1.4 stable new hires of women ages 19-24 in Baltimore City for each woman in the defined pool of local work-eligible TCA recipients. The trend for this age group of work-eligible TCA recipients in Baltimore City had been a steady decline of opportunities, from 2.3 stable new hires for each work-eligible recipient in 2006-2007, to 1.9 in 2007-2008, 1.6 in 2008-2009, 1.3 in 2009-2010, and 1.3 in 2010-2011. (See Table 4)

TABLE 4						
TRENDS IN TOP 10 HIRES RATIOS OF WORK-ELIGIBLE TCA WOMEN AGES 19-34 BALTIMORE CITY JULY 2006-MARCH 2012						
	July 2006 - June 2007	July 2007 - June 2008	July 2008 - June 2009	July 2009 - June 2010	April 2010 - March 2011	April 2011 - March 2012
19-24	0.44	0.52	0.62	0.75	0.76	0.71
25-34	0.34	0.39	0.45	0.59	0.61	0.56

Source: The Jacob France Institute, University of Baltimore, June 2013

**Figure 1 - TCA & SNAP: Paid Cases, Paid Recipients (Adults & Children)
July 2006 - May 2013 (Baltimore City)**



Source: The Jacob France Institute, University of Baltimore, June 2013

5.0 BALTIMORE COUNTY

TABLE 1

**TOP 10 INDUSTRY (NAICS) SUBSECTORS BASED ON
AVERAGE QUARTERLY LOCAL STABLE NEW HIRES OF WOMEN AGES 19-34
BALTIMORE COUNTY
April 2011 - March 2012**

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>
19-24	722	452	561	621	541	448	623	624	445	812
25-34	621	561	541	623	722	624	452	622	611	522

Source: The Jacob France Institute, University of Baltimore, June 2013

NAICS SUBSECTORS: 445--food and beverage stores; 446--health and personal care stores; 448--clothing and clothing accessories stores; 452--general merchandise stores; 522--credit intermediation and related activities; 541--professional, scientific, and technical services; 561--administrative and support services; 611--educational services; 621--ambulatory health care services; 622--hospitals; 623--nursing and residential care facilities; 624--social assistance; 721--accommodation; 722--food services and drinking places; 812--personal and laundry services; 813--religious, grantmaking, civic

Table 1 shows the NAICS industry subsector codes ranked number one for the two age groups that appear in Table 1—the first column reading from left to right. For women ages 19-24 NAICS industry subsector code 722 (food services and drinking places) is ranked first; but for women ages 25-34 the top ranking NAICS industry subsector code is 621 (ambulatory health care services), while industry subsector code 722 is ranked fifth. Industry subsector codes 445 (food and beverage stores), 448 (clothing and clothing accessories stores) and 812 (personal and laundry services) appear only in the top ten listing for women ages 19-24, while 622 (hospitals), 611 (educational services), and 522 (credit intermediation and related activities) only appear in the top ten listing for the 25-34 age group. This indicates that both age groups share 70% of the top industries listed.

TABLE 2

**AVERAGE NUMBER OF QUARTERLY LOCAL STABLE NEW HIRES OF WOMEN AGES 19-34
IN TOP 10 INDUSTRY (NAICS) SUBSECTORS RANKED BY NUMBER OF LOCAL STABLE NEW HIRES
BALTIMORE COUNTY
April 2011 - March 2012**

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>SUM</u>
19-24	346	281	194	184	125	108	72	66	64	57	1,497
25-34	327	303	271	245	232	133	113	103	85	78	1,890

Source: The Jacob France Institute, University of Baltimore, June 2013

The Table 2 first row and first column cell number is 346. This is the quarterly average number of NAICS code 722 (food services and drinking places) stable new hires of women ages 19-24 in Baltimore county from April 2011 through March 2012. The quarterly average number of stable new hires of women ages 25-34 for this same category (722) is 232.

TABLE 3						
RATIOS OF WORK-ELIGIBLE TCA WOMEN AGES 19-34 TO SUM OF TOP 10 LOCAL INDUSTRY SUBSECTOR STABLE NEW HIRES AND TO ALL LOCAL INDUSTRY SUBSECTOR STABLE NEW HIRES BOTH AGE GROUP-SPECIFIC AND AVERAGE APRIL 2011 - MARCH 2012 BALTIMORE COUNTY						
	1	2	3	4	5	6
	Work- eligible	Sum top 10	Sum of all	Column 2/ Column 3	Top 10 hires ratio	All hires ratio
	<u>TCA count</u>	<u>subsector hires</u>	<u>hires</u>	<u>Column 3</u>		
19-24	905	1,497	2,794	54	0.15	0.08
25-34	1,216	1,890	2,827	67	0.16	0.11

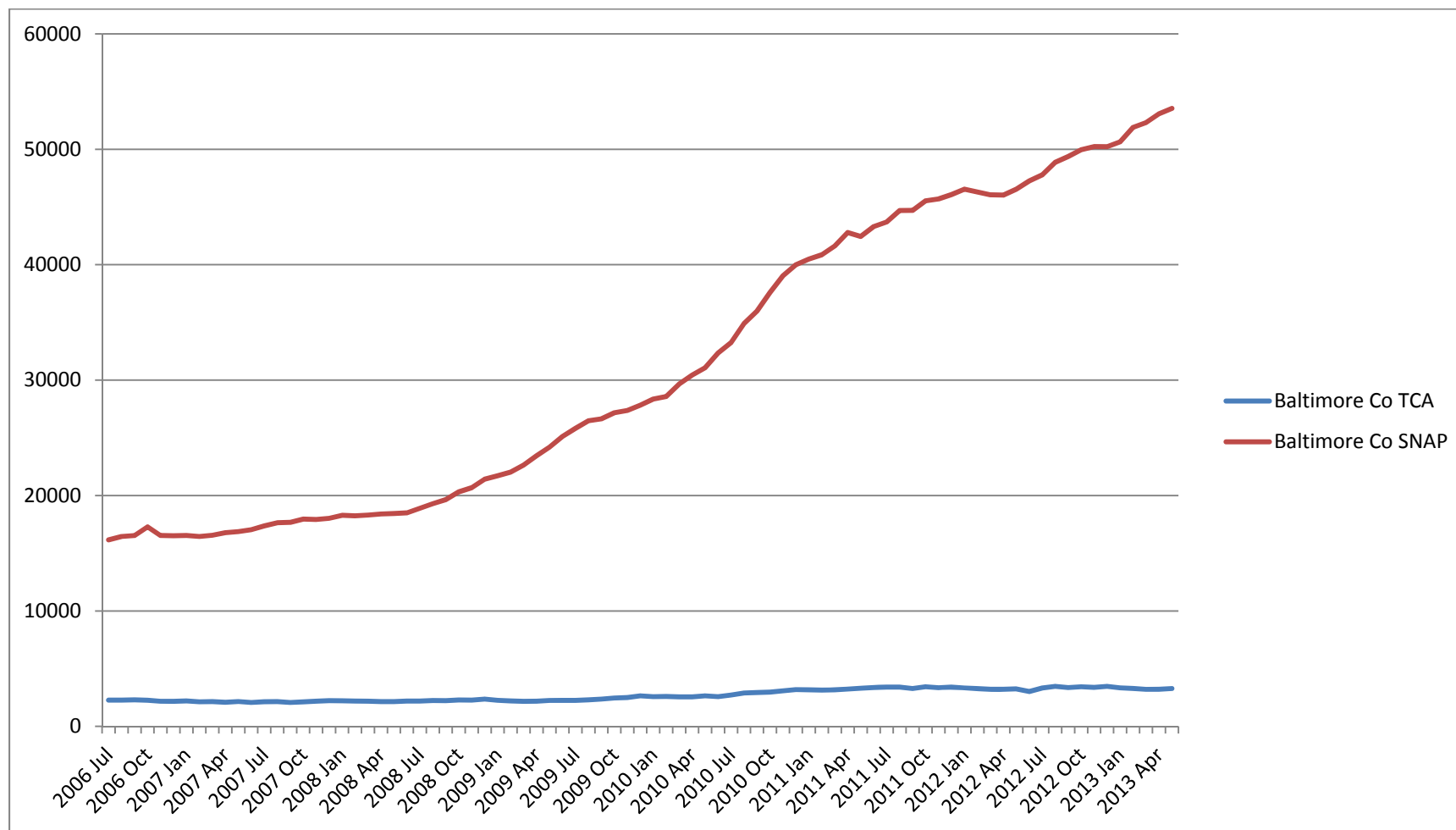
Source: The Jacob France Institute, University of Baltimore, June 2013

The Table 3 row 1 column 5 derived ratio value of 0.15 indicates that there were 6.6 stable new hires of women ages 19-24 in Baltimore County for each woman in the defined pool of local work-eligible TCA recipients. The trend for this age group of work-eligible TCA recipients in Baltimore County has decreased slightly, but otherwise has remained stable for both age groups since 2006 (see Table 4).

TABLE 4						
TRENDS IN TOP 10 HIRES RATIOS OF WORK-ELIGIBLE TCA WOMEN AGES 19-34 BALTIMORE COUNTY JULY 2006-MARCH 2012						
	July 2006 - June 2007	July 2007 - June 2008	July 2008 - June 2009	July 2009 - June 2010	April 2010 - March 2011	April 2011 - March 2012
19-24	0.06	0.07	0.07	0.09	0.11	0.15
25-34	0.07	0.07	0.08	0.12	0.14	0.16

Source: The Jacob France Institute, University of Baltimore, June 2013

**Figure 1 - TCA & SNAP: Paid Cases, Paid Recipients (Adults & Children)
July 2006 - May 2013 (Baltimore County)**



Source: The Jacob France Institute, University of Baltimore, June 2013

6.0 MONTGOMERY COUNTY

TABLE 1

**TOP 10 INDUSTRY (NAICS) SUBSECTORS BASED ON
AVERAGE QUARTERLY LOCAL STABLE NEW HIRES OF WOMEN AGES 19-34
MONTGOMERY COUNTY
April 2011 - March 2012**

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>
19-24	722	541	621	561	448	452	624	622	812	445
25-34	541	561	621	722	622	623	611	624	522	452

Source: The Jacob France Institute, University of Baltimore, June 2013

NAICS SUBSECTORS: 445--food and beverage stores; 446--health and personal care stores; 448--clothing and clothing accessories stores; 452--general merchandise stores; 522--credit intermediation and related activities; 541--professional, scientific, and technical services; 561--administrative and support services; 611--educational services; 621--ambulatory health care services; 622--hospitals; 623--nursing and residential care facilities; 624--social assistance; 721--accommodation; 722--food services and drinking places; 812--personal and laundry services; 813--religious, grantmaking, civic

Table 1 shows the NAICS industry subsector codes ranked number one for the two age groups that appear in Table 1—the first column reading from left to right. For women ages 19-24 NAICS industry subsector code 722 (food services and drinking places) is ranked first; but for women ages 25-34 the top ranking NAICS industry subsector code is 541 (professional, scientific, and technical services), while industry subsector code 722 is ranked fourth.

Industry subsector codes 623 (nursing and residential care facilities), 611 (educational services, and 522 (credit intermediation and related services) only appear in the top ten industries for women ages 25-34 in Montgomery county. Conversely, industry subsector codes 448 (clothing and clothing accessories stores), 812 (personal and laundry services) and 445 (food and beverage stores) only appear in the top ten industries for women ages 19-24 in Montgomery county. This indicates that both age groups share 70% of the top industries listed.

The Table 2 first row and first column cell number is 436. This is the quarterly average number of NAICS code 722 (food services and drinking places) stable new hires of women ages 19-24 in Montgomery County from April 2011 through March 2012. The quarterly average number of stable new hires of women ages 25-34 for this same category (722) is 279.

TABLE 2

**AVERAGE NUMBER OF QUARTERLY LOCAL STABLE NEW HIRES OF WOMEN AGES 19-34
IN TOP 10 INDUSTRY (NAICS) SUBSECTORS RANKED BY NUMBER OF LOCAL STABLE NEW HIRES
MONTGOMERY COUNTY**

April 2011 - March 2012

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>SUM</u>
19-24	436	312	221	219	158	127	102	87	87	83	1,832
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>SUM</u>
25-34	646	424	385	279	163	147	130	121	83	82	2,460

Source: The Jacob France Institute, University of Baltimore, June 2013

The Table 3 row 1 column 5 derived ratio value of 0.04 indicates that there were 23 stable new hires of women ages 19-24 in Montgomery County for each woman in the defined pool of local work-eligible TCA recipients. The trend for this age group of work-eligible TCA recipients in Montgomery County has remained stable since 2006 (see Table 4).

TABLE 3

**RATIOS OF WORK-ELIGIBLE TCA WOMEN AGES 19-34 TO
SUM OF TOP 10 LOCAL INDUSTRY SUBSECTOR STABLE NEW HIRES AND TO
ALL LOCAL INDUSTRY SUBSECTOR STABLE NEW HIRES
BOTH AGE GROUP-SPECIFIC AND AVERAGE APRIL 2011 - MARCH 2012
MONTGOMERY COUNTY**

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>
	Work- eligible	Sum top 10	Sum of all	Column 2/ Column 3	Top 10 hires ratio	All hires ratio
	<u>TCA count</u>	<u>subsector hires</u>	<u>hires</u>			
19-24	319	1,832	2,767	66	0.04	0.03
25-34	413	2,460	3,683	67	0.04	0.03

Source: The Jacob France Institute, University of Baltimore, June 2013

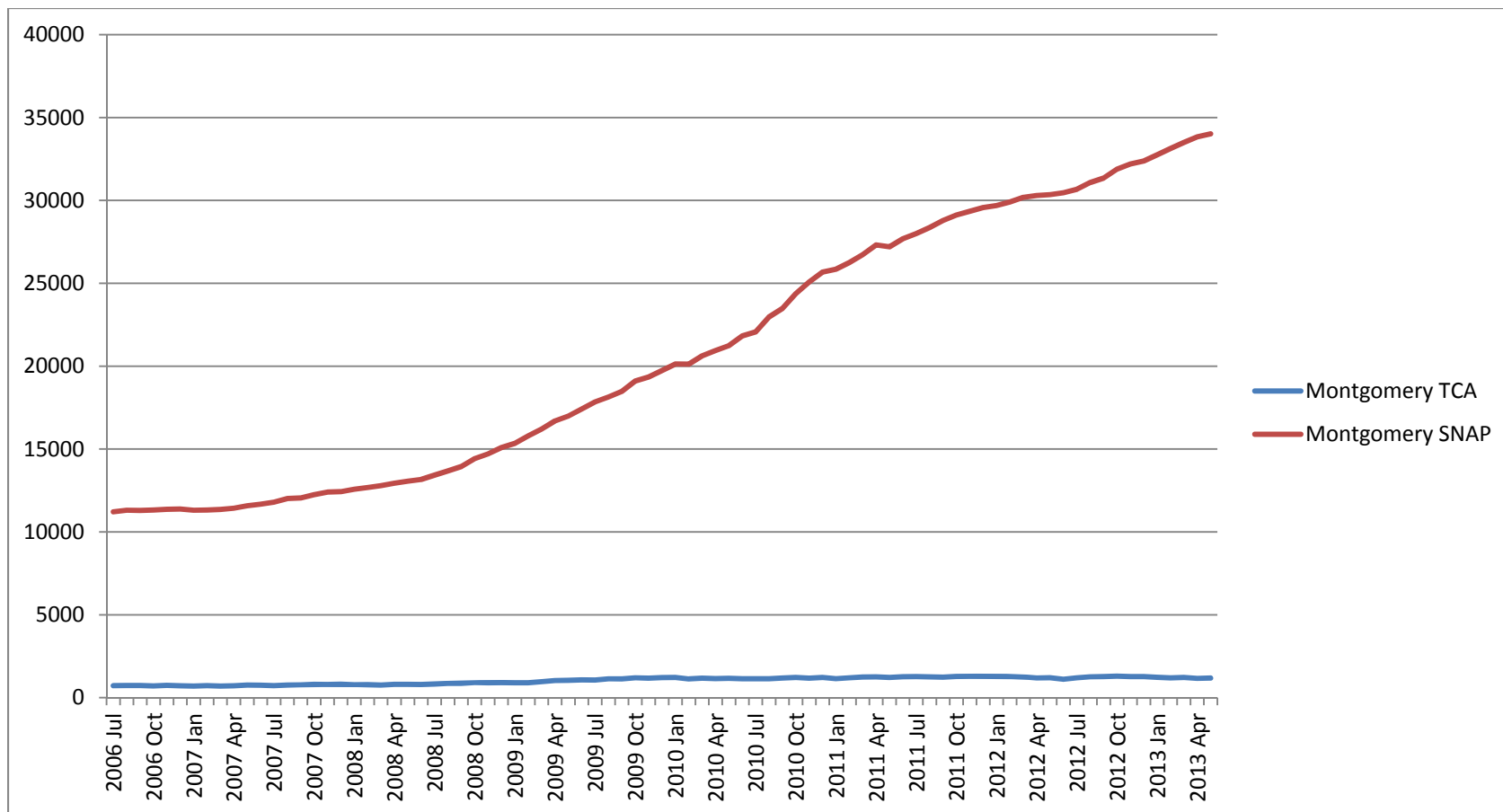
TABLE 4

**TRENDS IN TOP 10 HIRES RATIOS
OF WORK-ELIGIBLE TCA WOMEN AGES 19-34
MONTGOMERY COUNTY
JULY 2006-MARCH 2012**

	July 2006 - June 2007	July 2007 - June 2008	July 2008 - June 2009	July 2009 - June 2010	April 2010 - March 2011	April 2011 - March 2012
19-24	0.02	0.02	0.02	0.04	0.04	0.04
25-34	0.02	0.02	0.03	0.04	0.04	0.04

Source: The Jacob France Institute, University of Baltimore, June 2013

**Figure 1 - TCA & SNAP: Paid Cases, Paid Recipients (Adults & Children)
July 2006 - May 2013 (Montgomery County)**



Source: The Jacob France Institute, University of Baltimore, June 2013

7.0 PRINCE GEORGE'S COUNTY

TABLE 1

**TOP 10 INDUSTRY (NAICS) SUBSECTORS BASED ON
AVERAGE QUARTERLY LOCAL STABLE NEW HIRES OF WOMEN AGES 19-34
PRINCE GEORGE'S COUNTY
April 2011 - March 2012**

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>
19-24	722	452	448	621	541	561	445	624	522	446
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>
25-34	722	541	561	621	623	452	624	622	522	448

Source: The Jacob France Institute, University of Baltimore, June 2013

NAICS SUBSECTORS: 445--food and beverage stores; 446--health and personal care stores; 448--clothing and clothing accessories stores; 452--general merchandise stores; 522--credit intermediation and related activities; 541--professional, scientific, and technical services; 561--administrative and support services; 611--educational services; 621--ambulatory health care services; 622--hospitals; 623--nursing and residential care facilities; 624--social assistance; 721--accommodation; 722--food services and drinking places; 812--personal and laundry services; 813--religious, grantmaking, civic

Table 1 shows the NAICS industry subsector codes ranked number one for the two age groups that appear in Table 1—the first column reading from left to right. For both age groups of women, the NAICS industry subsector code 722 (food services and drinking places) is ranked first. Industry subsector codes 445 (food and beverage stores) and 446 (health and personal care stores) only appear in the top ten industries for women ages 19-24. Industry subsector codes 623 (nursing and residential care facilities) and 622 (hospitals) only appear in the top ten industries for women ages 25-34. This indicates that both age groups share 80% of the top industries listed in Prince George's County.

TABLE 2

**AVERAGE NUMBER OF QUARTERLY LOCAL STABLE NEW HIRES OF WOMEN AGES 19-34
IN TOP 10 INDUSTRY (NAICS) SUBSECTORS RANKED BY NUMBER OF LOCAL STABLE NEW HIRES
PRINCE GEORGE'S COUNTY
April 2011 - March 2012**

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>SUM</u>
19-24	408	135	116	114	110	100	70	54	53	48	1,208
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>SUM</u>
25-34	213	189	170	165	100	82	65	57	54	51	1,146

Source: The Jacob France Institute, University of Baltimore, June 2013

The Table 2 first row and first column cell number is 408. This is the quarterly average number of NAICS code 722 (food services and drinking places) stable new hires of women ages 19-24 in Prince George's County from April 2011 through March 2012. The quarterly average number of stable new hires of women ages 25-34 for this same category (722) is 213.

TABLE 3						
RATIOS OF WORK-ELIGIBLE TCA WOMEN AGES 19-34 TO SUM OF TOP 10 LOCAL INDUSTRY SUBSECTOR STABLE NEW HIRES AND TO ALL LOCAL INDUSTRY SUBSECTOR STABLE NEW HIRES BOTH AGE GROUP-SPECIFIC AND AVERAGE APRIL 2011 - MARCH 2012 PRINCE GEORGE'S COUNTY						
	1	2	3	4	5	6
	Work- eligible	Sum top 10	Sum of all	Column 2/ Column 3	Top 10 hires ratio	All hires ratio
	<u>TCA count</u>	<u>subsector hires</u>	<u>hires</u>			
19-24	1,080	1,208	1,776	68	0.22	0.15
25-34	1,146	1,146	1,799	64	0.25	0.16

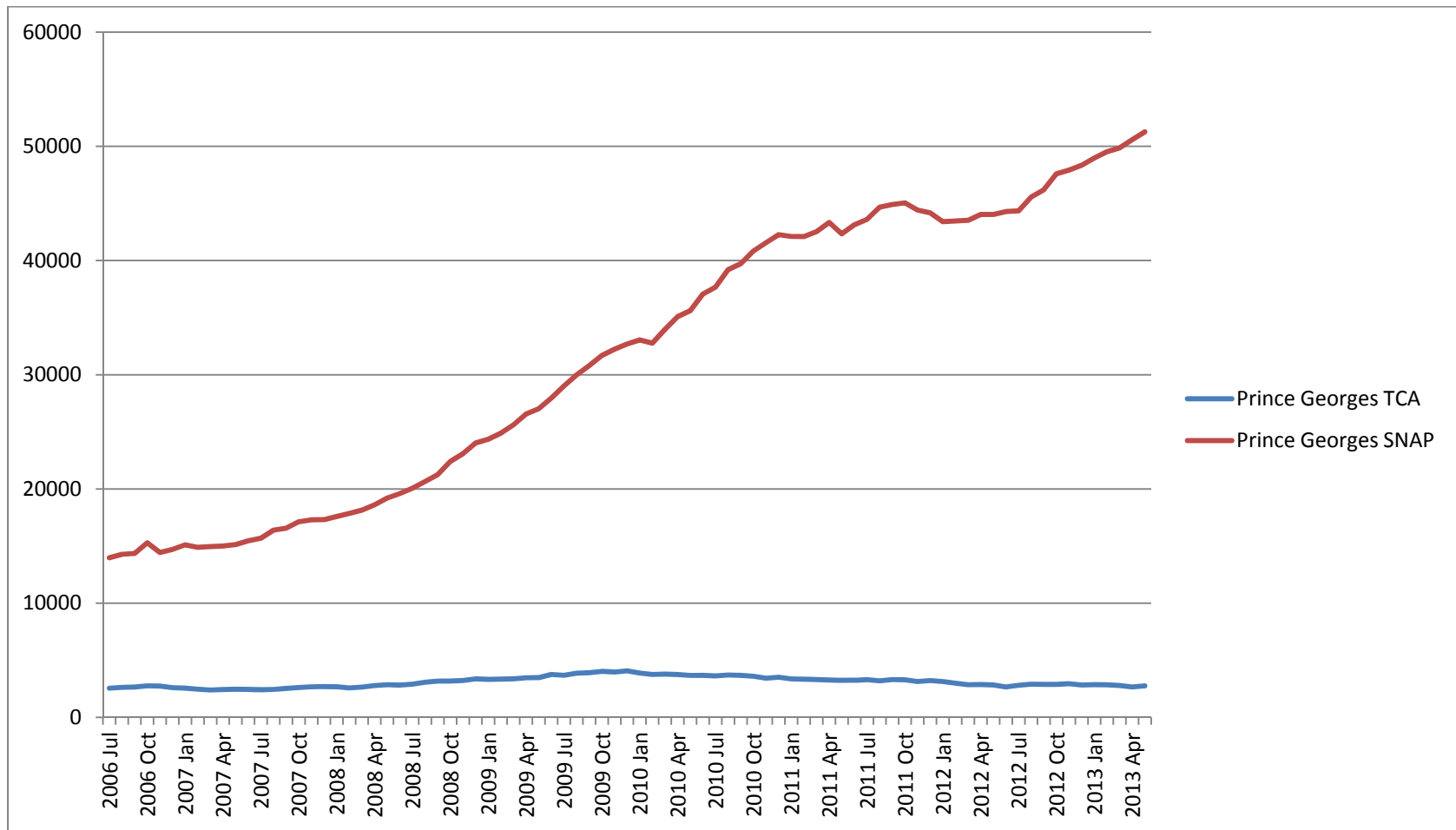
Source: The Jacob France Institute, University of Baltimore, June 2013

The Table 3 row 1 column 5 derived ratio value of 0.22 indicates that there were 4.5 stable new hires of women ages 19-24 in Prince George's County for each woman in the defined pool of local work-eligible TCA recipients. The trend for this age group of work-eligible TCA recipients in Prince George's county peaked from 2009 to 2011 and has since regressed to be consistent with 2008-2009 levels (see Table 4). This ratio spike can likely be attributed to the recession.

TABLE 4						
TRENDS IN TOP 10 HIRES RATIOS OF WORK-ELIGIBLE TCA WOMEN AGES 19-34 PRINCE GEORGE'S COUNTY JULY 2006-MARCH 2012						
	July 2006 - June 2007	July 2007 - June 2008	July 2008 - June 2009	July 2009 - June 2010	April 2010 - March 2011	April 2011 - March 2012
19-24	0.11	0.15	0.23	0.31	0.29	0.22
25-34	0.11	0.16	0.23	0.32	0.29	0.25

Source: The Jacob France Institute, University of Baltimore, June 2013

**Figure 1 - TCA & SNAP: Paid Cases, Paid Recipients (Adults & Children)
July 2006 - May 2013 (Prince George's County)**

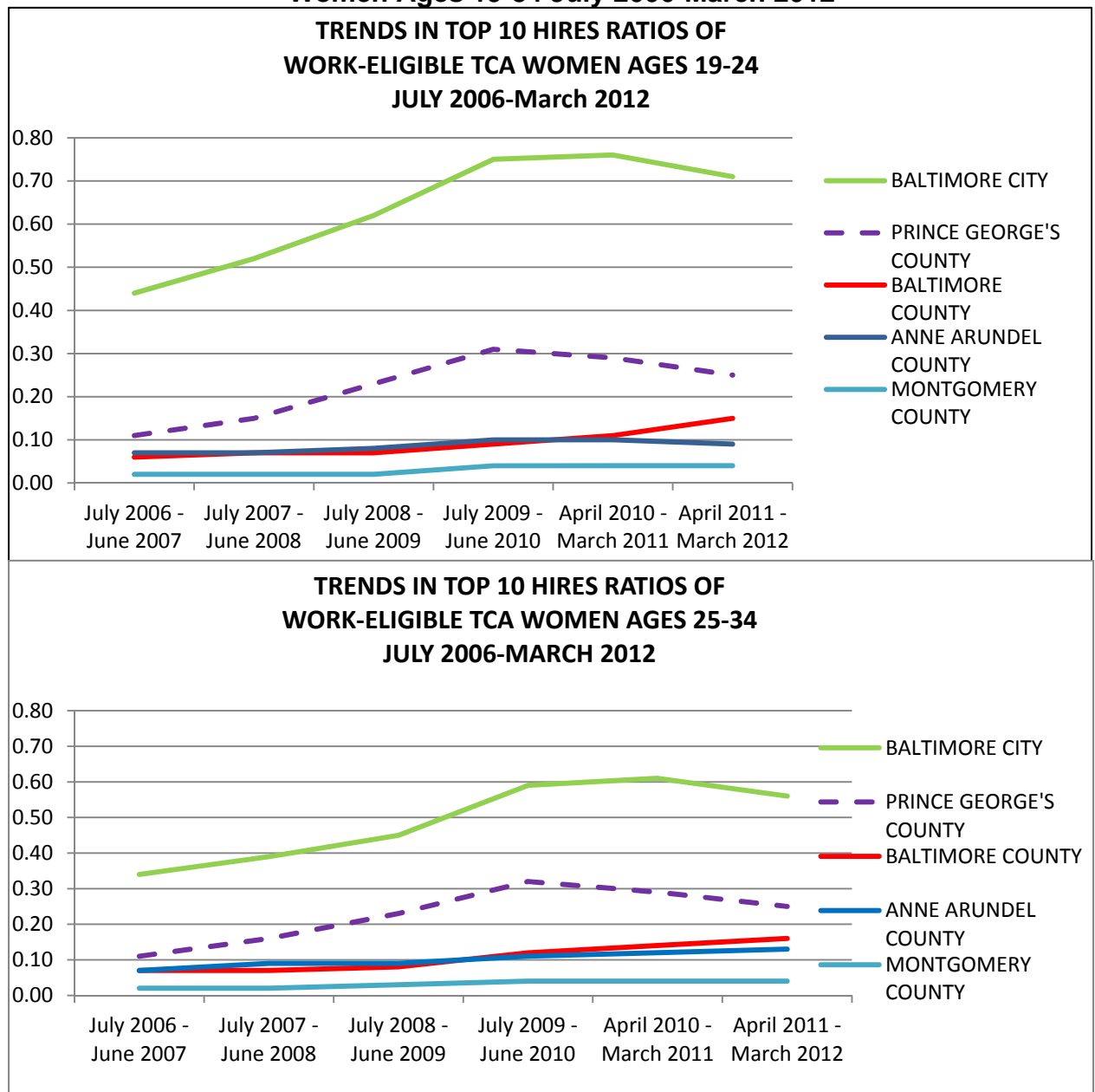


Source: The Jacob France Institute, University of Baltimore, June 2013

8.0 TCA AND SNAP CASELOAD TRENDS

Figure 2 below is a graphical representation of the data presented Table 4 presented in the preceding five sections. This two part Figure, separating the county-specific top 10 stable new hire trends for the two age groups of welfare recipients, highlights recent leveling off of the hires ratio trends, particularly in Baltimore City and Prince George's County, and the differences in the ratio levels among the five counties.

Figure 2- Trends in Top 10 Hires Ratios of Work-Eligible TCA Women Ages 19-34 July 2006-March 2012



Source: The Jacob France Institute, University of Baltimore, June 2013

We alert readers to be careful when interpreting each of the Figure 2 graphs. A **rising** trend line indicates worsening stable new hires conditions. Recall the earlier definition that places new hires in the denominator and welfare recipients in the numerator of the ratio calculations. Therefore, an increasing ratio indicates a growing 'wedge' between recipients and job opportunities.

We also alert readers that changes can occur in the denominator number, the numerator number, or both. This means that care must be exercised when drawing program management and policy conclusions from the ratio trends and differences.

Figures 3 and 4, on pages 28 and 29 for TCA and SNAP caseloads respectively, offer a different visualization of the same data that underlie Figure 2. However, for ease of interpretation, now the y-axis (vertical) scale is the same in Figure 3 for the five county TCA paid caseload trends graphed together; and a different y-axis (vertical) scale appears in Figure 4 than in Figure 3, because of the large difference in TCA and SNAP caseloads, but the Figure 4 y-axis (vertical) scale is the same for each of the five county SNAP paid caseload trends that are graphed together.

Figure 3 - TCA Paid Cases, Paid Recipients (Adults & Children) July 2006 - May 2013

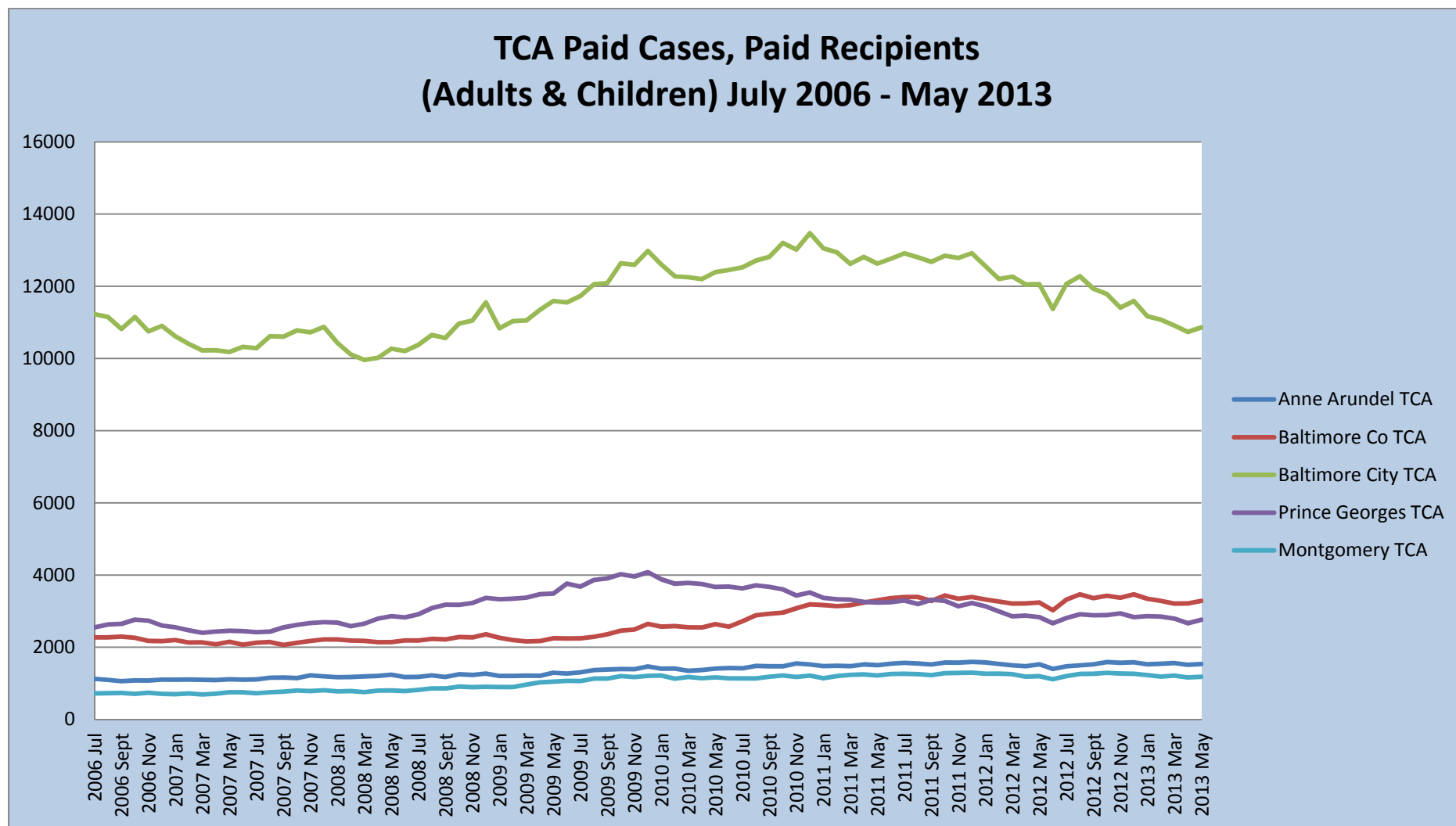
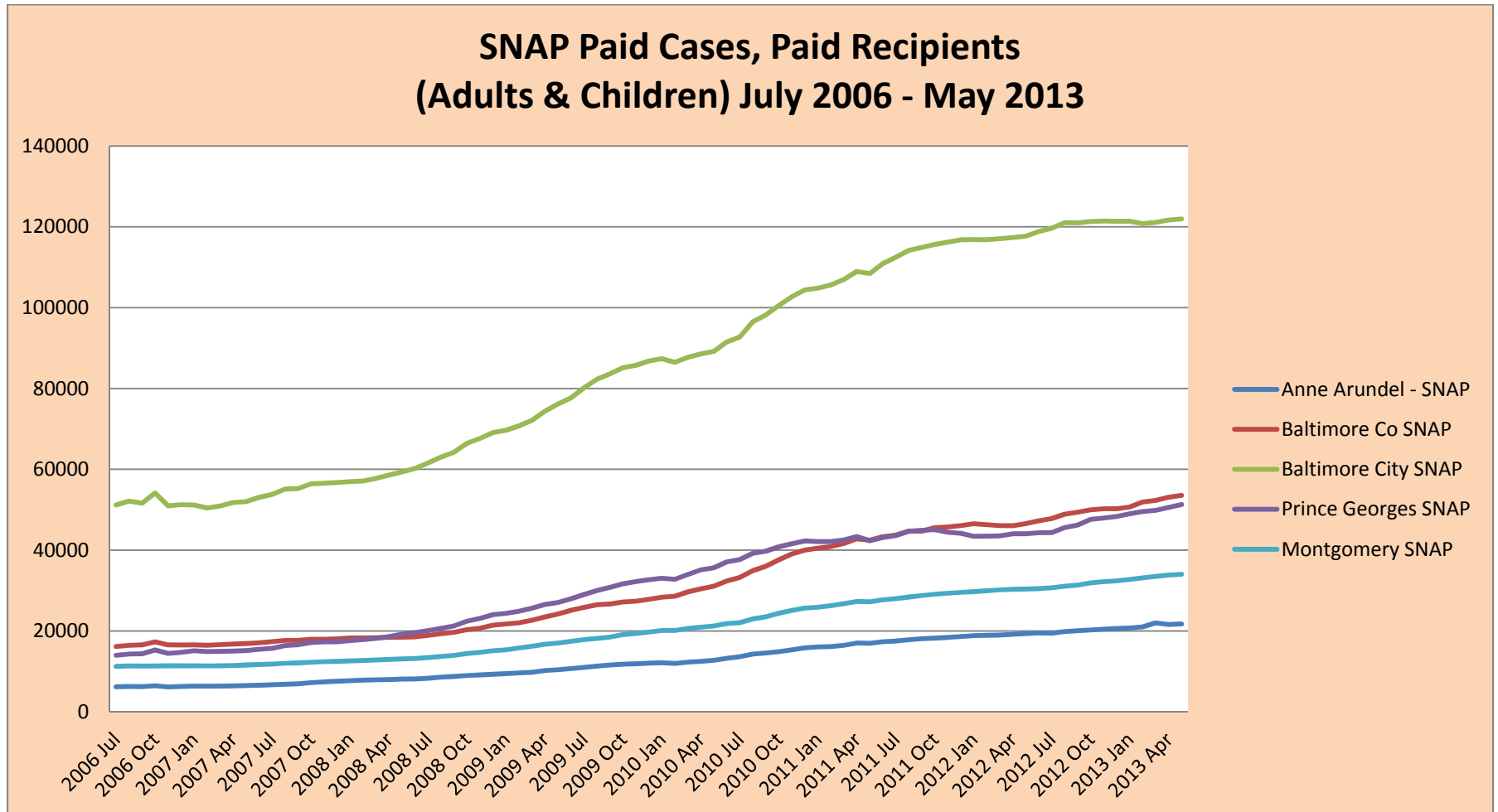


Figure 4 - SNAP Paid Cases, Paid Recipients (Adults & Children) July 2006 - May 2013



9.0 CONCLUSIONS

The effective date of the February 2008 *Reauthorization of the Temporary Assistance for Needy Families (TANF) Program: Final Rule* was October 1, 2008. The last sentence of the supplementary information introduction to the *Final Rule* is: Under this final rule States are accountable for moving more families to self-sufficiency and independence. Of course, we know now that a spike in deteriorating economic conditions occurred at the time when this new *Final Rule* was effective.

We have used the most current available information about mid-Maryland job opportunities for women ages 19-34 to estimate local differences in how many hires can be thought of as 'relevant' for local DSS staff assistance to carry out the mandate to move more families to self-sufficiency and independence. Our opportunity estimates are based on April 2011-March 2012 stable new hires information by mid-Maryland county, gender and age group.

We continue to encourage Maryland Department of Human Resources headquarters staff and local Department of Social Services front-line staffs to use the new information presented here as a starting point for thought and conversation about how local differences in job opportunities should be translated into actions consistent with the mandate to move more families to self-sufficiency and independence. We remain available to participate in this conversation and hasten progress toward the shared goal of TCA recipient self-sufficiency and independence in very challenging economic circumstances.