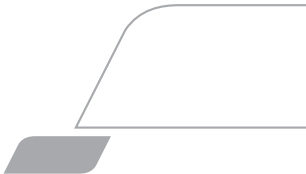


FREE AGENTS:

HOW "KNOWLEDGE WORKERS"
ARE REDEFINING THE
WORKPLACE

JOCELYN LINCOLN AND MEGAN M. RAFTERY





Today's businesses face an unprecedented pace of change and uncertainty that makes it difficult to define current workforce needs—and even more daunting to predict future needs. As a workforce solutions partner to many of the world's top companies, Kelly Services® continually analyzes labor dynamics and employment-related trends to help our clients create effective talent strategies. The growth of the free agent workforce is a trend we spotted more than a decade ago, and we've been tracking it closely ever since.

This segment of the workforce—temporary employees, independent contractors, small business owners, and other non-traditional workers—offers much-needed flexibility in today's unpredictable environment. But how have these employees been affected by the recession, and what does their growth mean for businesses that must compete for the best talent at the right time? We recently conducted in-depth research to better understand today's free agents and how companies can better leverage this fast-growing, flexible resource.

We found that recent economic realities, coupled with workers' desire for flexible and engaging work, have led to a significant shift away from the traditional employment relationship. Workers are increasingly interested in free agent options such as microwork, independent contracting, temporary and project work, and entrepreneurship. This report takes a closer look into this world of non-traditional work and answers pressing questions such as:

- Who are today's free agents? What do they have to offer, and how are they different from traditional employees?
- Why are workers voluntarily choosing this workstyle?
- Why is your brand, and the kind of work you have to offer, so important in attracting free agents?
- Why are more than 50% of traditional employees giving more consideration to free agency?

Our research also offers insight into how companies are creatively tapping into this flexible workforce; how effectively they are leveraging the flexibility it offers; and what you can do to get started if you haven't yet developed a talent strategy that includes free agents.

Today's workforce strategies center around the ability to access the best talent when and where you need it, in a quick and flexible manner. In an uncertain future, one thing is clear: the companies with the strongest workforces will be those that adapt to the changing trends and consider a wide array of worker populations to meet their needs. We hope the information shared here will help you fine-tune your approach to workforce planning so you can take full advantage of the talent and versatility offered by the free agent workforce.

Carl Camden, President and CEO
Kelly Services, Inc.



CARL CAMDEN,
PRESIDENT AND CEO
KELLY SERVICES, INC.

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INTRODUCTION

Work is not what it used to be.

Careers are no longer built on a long-term commitment to one employer. The nine-to-five job, which requires us to clock in and out each day, is giving way to new options. The number of freelancers, contractors, temporary employees, and entrepreneurs is growing, and employers are increasingly making contingent workers part of their overall workforce strategy.

As technology makes it possible for us to connect and work together from wherever we are around the world, the trend toward flexible, project-based workforces has picked up considerable pace—and the benefits for both employees and employers are now becoming clear.

Companies have realized they can scale up and down faster and easier by adopting more flexible workforce strategies. And the new “knowledge workers” are finding it easier to access the work they want to do, when they want to do it.

In this whitepaper we explore the results of the Kelly Services 2011 Free Agent survey, which collates the responses of more than 1,800 workers across the United States. We provide new insights into the free agent workstyle, discuss what the future holds for workers and employers, and provide recommendations on how employers can capitalize on the rapidly growing free agent trend.

Definition:

Free agent:

An independent professional who moves from project to project, location to location, enhancing their skills and knowledge with each assignment. Free agents prefer freedom and flexibility over the security of traditional employment, and look for challenging and rewarding work that complements their personal goals.

SURVEY METHODOLOGY

The 2011 Free Agent research was conducted online by Inavero on behalf of Kelly Services among a representative sample of adults active in the U.S. workforce.

01

WHAT'S POWERING THE FREE AGENCY SURGE?

As long-term commitments to employers wane, careers built on flexibility are gaining new ground.

According to the research results, close to half of all workers in the U.S. (44%) now classify themselves as free agents. This is a 70% increase over the past three years—up from just 26% in 2008.

Growth such as this suggests two things: first, that free agency is becoming more accessible and more attractive to U.S. workers, and second, that the amount of work available to free agents is also increasing. There are many underlying factors that are contributing to this increase, but among the most significant are:

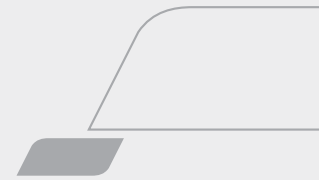
- **An aging workforce:** Since 1980, the percentage of U.S. workers age 45 and above has risen to more than 44%, a rise of 2 percentage points in the past three years. Seeking greater freedom and flexibility, mature workers are more likely to be free agents than their younger counterparts.
- **Changing attitudes:** The surge in free agency is also reflective of a shift in worker attitudes. Workers are increasingly drawn to the opportunities and advantages offered by the free agent lifestyle—flexibility in work options, freedom to choose interesting or rewarding work, increased independence and control, and entrepreneurial empowerment.
- **Economic downturn:** The impact of economic conditions has forced workers and employers to consider more flexible arrangements. Compared with the 2008 survey results, “terminations/layoffs from previous employment” and “the inability to find work elsewhere” were cited twice as often as the primary reasons for choosing free agency over traditional employment.

As the labor market recovers and the nation returns to more stable employment conditions, the proportion of free agents in the U.S. working population could move



back from 44% to around 30 – 35%, but the trend toward more free agents is still very strong and is increasing worldwide. Accounting for differences in legislative frameworks and social and cultural norms, we estimate that the global free agent population is at least 20 – 30% of the entire workforce, and growing.

Of course, there remain significant differences in the ways that various employers engage with free agents—some do it often and others not at all. Yet, for the organizations that are working with free agents, they now account for more than four out of every 10 workers employed in the U.S. With that in mind, it's clear that flexible workplace practices are no longer the anomalies they once were.



02

THE RISE OF THE WELL-EDUCATED MICROPRENEUR

Despite different attitudes, work ethics, and expectations, every generation of worker is showing increasing interest in free agency.

Since 2008 a dramatic rise in every type of free agent has occurred (Figure 1). Most notably, micropreneurs (freelancers, independent contractors, and entrepreneurs without staff) now represent 30% of the U.S. workforce. This has increased by almost 70% since our last survey.

The number of workers who are engaged as temporary employees or freelancers through a staffing company is also on the rise. Even the smallest segment of the free agent population, entrepreneurs or business owners with staff or personnel, has doubled since 2008.

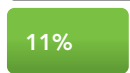


FIGURE 1:

% of working population by workstyle classification

Numbers are on the rise across every type of free agent

FREELANCING ON OWN, INDEPENDENT CONTRACTOR



AN ENTREPRENEUR OR BUSINESS OWNER (WITHOUT STAFF/PERSONNEL)



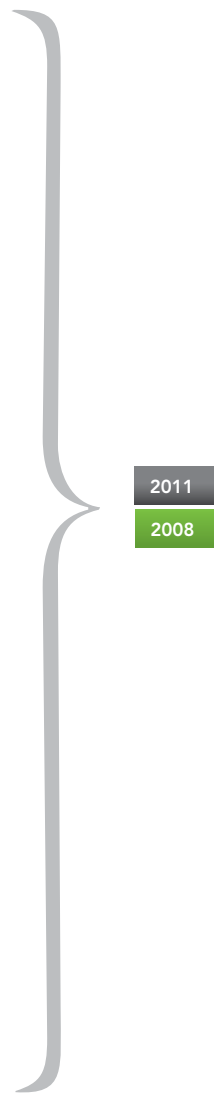
**A TEMPORARY OR CONTRACT EMPLOYEE/
FREELANCING WITH SUPPORT OF STAFFING FIRM**



AN ENTREPRENEUR OR BUSINESS OWNER (WITH STAFF/PERSONNEL)



TRADITIONALLY/DIRECTLY EMPLOYED

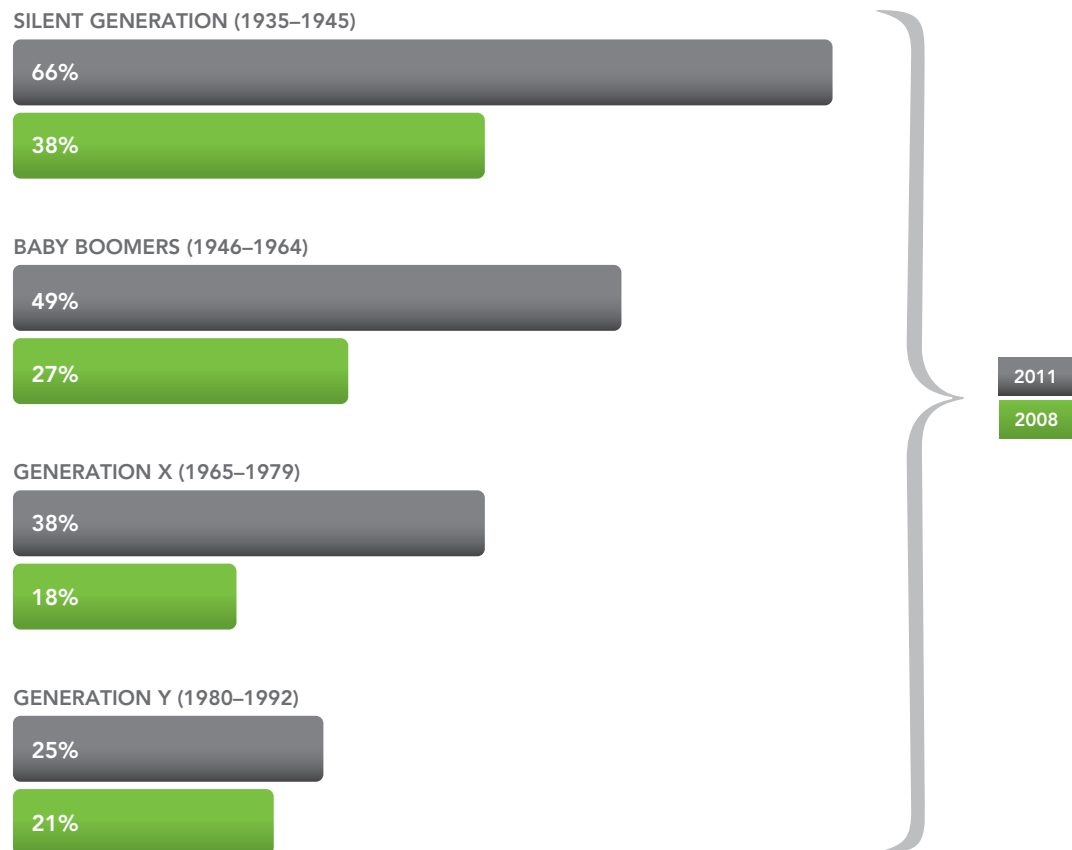


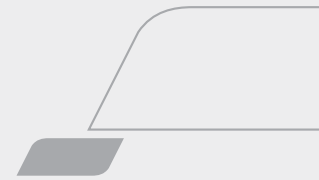
And this shift toward free agency can be seen across every generational group (Figure 2).

FIGURE 2:

% of free agent workers by generation

Numbers are on the rise across all generations





Despite the different attitudes, work ethics, opinions, and expectations of these four generations, they are all showing increasing interest in the free agent workstyle. This poses a new challenge for organizations as they seek to engage and manage the four generations simultaneously.

- **Silent Generation** (born between 1935 and 1945): Two-thirds of workers from this generation now work as free agents—the largest proportion of all four age groups. The free agent workstyle has particular advantages for people looking to phase into retirement on their own terms.
- **Baby Boomers** (born between 1946 and 1964): Half of these workers now operate as free agents. As this generation moves toward retirement we will undoubtedly see this proportion rise in line with the Silent Generation for the same reasons.
- **Generation X** (born between 1965 and 1979): Almost four in 10 workers in this age group are now free agents—more than doubling in just three years.
- **Generation Y** (born between 1980 and 1992): One-quarter of this group identify as free agents, a modest gain on 2008 levels. This shows that free agency is still preferred by older workers, and is perhaps easier to obtain as experience levels increase.

As workers progress in their careers, their propensity to work as free agents increases. With two-thirds of the free agent population consisting of workers from the Baby Boomer and Silent Generations, free agents as a whole are highly skilled and well educated, with decades of work experience. More than one-third of all free agents have earned a master's degree or higher, and compared with traditional employees, more free agents (77% compared to 62% for traditional employees) possess technical or professional skill set.

As employers seek to fill critical positions that require specialized skills and experience, many employers will need and want to attract these workers.

03

WHAT MOTIVATES THE FREE AGENT?

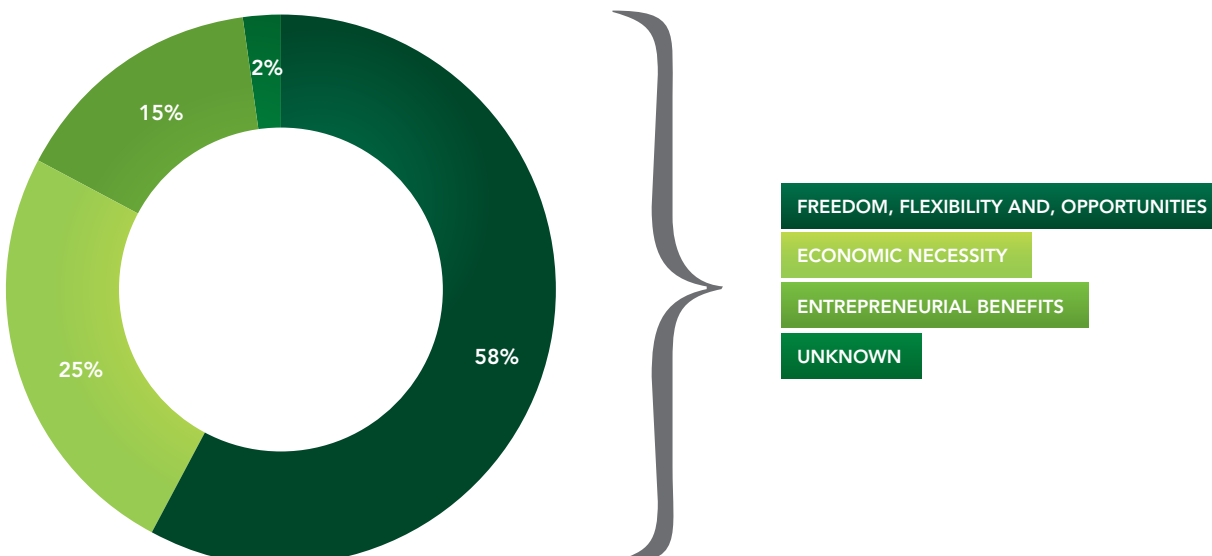
Flexibility isn't the only reason workers choose a free agent workstyle.

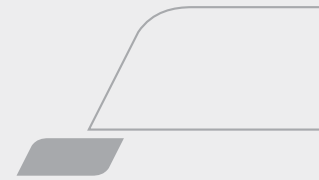
Despite some of the increase in free agency being attributable to the recent economic downturn, almost three-quarters of all free agents voluntarily choose this workstyle. But which factors make free agency appealing to a growing number of people across all age groups?

The increased freedom, flexibility, and opportunities that free agency provides is the primary reason that workers choose it over traditional employment (Figure 3). While work-life balance is another key driver of this trend, the research also shows that the empowerment that comes with being your own boss is a compelling reason to pursue free agency.

FIGURE 3:
Reasons for choosing the free agent lifestyle

73% voluntarily choose the free agent workstyle because they value the freedom, flexibility, and entrepreneurial benefits





Motives for choosing the free agent workstyle differ somewhat across the generations. For Gen Y, the real value is in the additional opportunities that a free agent workstyle provides. Being able to develop skills and build a portfolio of varied and challenging work early in their career is often something that new entrants to the workforce want, but struggle to obtain in traditional employment.

Gen X workers, on the other hand, are choosing free agency to gain greater flexibility and work-life balance. Often, they've gained considerable experience, but are balancing multiple priorities in their lives, including family commitments. Baby Boomers and the Silent Generation seek out free agency because they value the freedom it provides in the latter stages of their career. As they look toward retirement, free agency allows them to reduce their workload on their own terms.

Gen Y workers are the most likely to have become free agents because of economic conditions. This doesn't mean they have done so reluctantly or that they will seek out traditional roles when they again become easier to find. In fact, the research shows that 38% of free agents believe economic conditions have actually enhanced their opportunities by strengthening demand for their expertise.

Although some are pushed into free agency, most voluntarily choose it. While the motivation for choosing this workstyle may differ as we age, free agency provides a significant upside for every generation of worker. Whether just starting out in the workforce or looking to leave it, free agency offers employees the flexibility, autonomy, and opportunity that traditional employment is often unable to match.

04

IS THERE SOMETHING IN THE WATER?

The satisfaction levels of free agents are higher on most counts than traditional employees, and the rates are increasing.



Even though free agents have endured the same tough economic times as everyone else over the past few years, their satisfaction levels have actually improved since 2008.

Compared with traditional workers, free agents report being significantly more satisfied with many aspects of their careers. Most notably, free agents say they are more satisfied with their:

- Ability to manage their own career path and development
- Opportunity to expand their skills
- Annual salary
- Work-life balance
- Level of work-related stress

Despite all the good news for free agents, there remain two aspects of traditional employment that workers perceive to be better than free agency conditions: job security and healthcare options. However, when these two factors are weighed against every other aspect of employment, the benefits of free agency consistently fulfill more of the lifestyle checklist that high-performing workers increasingly desire. (Figures 4 and 5)

FIGURE 4:

Who is more satisfied?

Free agents agree that their workstyle gives them more control over their career and opens the door to more opportunities to build their skills.

WHO IS MORE SATISFIED?	FREE AGENTS	TRADITIONAL EMPLOYEES
Overall employment situation	*	
Work-life balance	*	
Work-related stress	*	
Opportunities to expand skills	*	
Opportunities to advance career	*	
Job security		*
Annual salary	*	
Available healthcare options		*

FIGURE 5:

Free agent employment satisfaction levels 2011 vs 2008

Free agents are more satisfied with their employment situation than they were in 2008



The strength of free agent satisfaction provides some insight into why traditional approaches to retaining and motivating workers over the long term is so difficult—flexibility and choice don't mesh as well with traditional workforce strategies.

05

KEEP THEM INTERESTED

What motivates a free agent to say yes to a project?
You might be surprised to find it's not all about the money.

We've seen that one of the most appealing aspects of the free agent workstyle is being able to move from project to project, deciding which assignments to accept and which to avoid. But how do free agents find work, and how do they choose which assignments to accept?

The top method of finding work for most free agents is referrals from friends, family members, and former employees or colleagues. Many free agents find their projects by relying on professional contacts and established networks, and the popularity of online marketplaces and communities has grown rapidly as a result.

Popular sites such as craigslist® and ProjectSpring help free agents access telecommuting contracts or assignments that require their specific skill set. Other sites, such as Tongal®, post their project offerings as contests, awarding contracts to the best applicants. Many of these sites help businesses complete work virtually, either contracting with individual free agents or assembling project teams in diverse geographic locations.

The advantages of staffing and workforce solutions companies, such as screening, assessing, and validating both company and worker, appeal to one in every five free agents (20%). For younger workers this proportion is much higher—almost one-half of Gen Y free agents (45%) use staffing firms to secure new assignments. The percentage of workers supported by a staffing firm has increased substantially since 2008, and this is significant for companies looking to access this valuable talent pool.



As far as choosing which projects to accept and which to avoid, there are three main factors free agents consider:

- 1. Interest:** First and foremost, free agents are looking for work that interests them. The type of work and the quality of the project or assignment becomes increasingly important as free agents get older.
- 2. Revenue potential:** The profitability of assignments is the second consideration for free agents weighing multiple assignments.
- 3. Reputation of the client:** Free agents want to work with clients they admire, trust, and/or identify with.

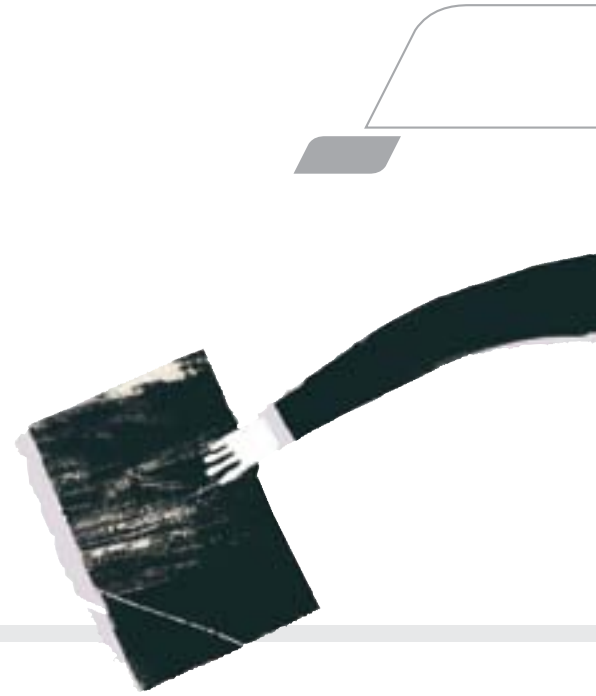
The factors that influence how free agents select their next assignment differ somewhat across the generations. Gen Y workers place a premium on the ease of finding work assignments and projects, while compared to other generations, Baby Boomers and Gen X tend to view the reputation of the company or organization as being more important. Gen X workers also place a greater emphasis on the revenue potential of the assignment than other generations.



06

THE FUTURE OF FREE AGENCY

Both employees and employers will drive further growth in the free agent population.



Free agents now represent more than one-third of the workforce. Yet, there are several factors that will fuel further growth in this workstyle.

The employee's perspective:

- **Economic uncertainty:** The state of the economy remains foremost in the minds of the U.S. workforce, yet as workers realize that guaranteed job security is a thing of the past, uncertainty is sparking new interest in the free agent workstyle. More than half of traditional employees agree that current economic conditions have caused them to increasingly consider the free agent workstyle as a way of gaining greater control over their own career and income stream.
- **New health and retirement options:** The historic dependence of workers on their employers for benefits such as healthcare and retirement savings looks set for change in coming years. Should more flexible and affordable healthcare become available, the research shows that more than one-third of traditional employees indicate they would be “likely” or “very likely” to consider the free agent workstyle.
- **Household make up:** Two-income families provide greater flexibility for exploring free agency. As one spouse maintains the security of traditional employment, the other is able to explore more flexible work opportunities.
- **New technologies:** Video conferencing, instant messaging, cloud computing, and social networking have emerged to connect free agents effortlessly with the networks and tools they need to access work all over the world.
- **Changing worker attitudes:** Younger workers are less likely to commit to one employer for a lifetime and are looking for the best opportunities to expand and differentiate their work portfolio. Mid-career workers often have competing life priorities and are looking for ways to access greater flexibility. Similarly, older workers are looking for more flexible ways to move into retirement and to maximize the value

of their extensive experience. Downsizing, business pressures, and a competing load of work and family responsibilities are prompting many workers to seek more flexibility and balance in their lives.

- **Demographic shifts:** Mature workers are disproportionately more likely to be free agents than their younger counterparts, and as the workforce continues to age, the shift toward the flexibility of free agency will continue. As older workers delay full retirement, the freedom and flexibility of the free agent option is becoming extremely attractive. These workers are experienced, highly skilled and educated, and have developed a wide network of professional contacts through their years of work. They offer a great deal of value to employers who are looking for qualified talent who will add instant value.

The employer's perspective:

- **Talent and skill gaps:** As employers struggle to fill vacancies in the professional and technical areas, accessing the best talent, wherever it may be, becomes paramount. Strategically utilizing free agents allows employers to widen their net when seeking optimal talent, giving them access to a variety of resources such as entrepreneurs, retirees, and at-home workers. This is a critical source of talent as employers seek to close current gaps and build a talent pipeline for the future.
- **Competitive pressures:** As companies struggle to maintain competitiveness, they are encouraged to adopt an agile and scalable employment model. The goal of building a flexible employment model in response to changing business dynamics is becoming a major competitive strategy.
- **Retaining key skills and knowledge:** Workers have cast their vote—they want more flexible schedules, telecommuting, and variable work arrangements. As companies increasingly realize this, they will seek to retain talented individuals with key skills and company intelligence by incorporating free agents into their workforce strategy.

All of these simultaneous trends in the workforce are driving a steady increase in the numbers of workers seeking to transition from traditional careers to working independently as free agents. Workers are understandably drawn to this new type of employment where lifestyle considerations increasingly influence employment decisions, and freedom and flexibility outweigh traditional ideas of certainty and security.

07

EMPLOYERS SLOW TO ADAPT

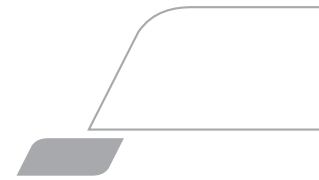
The rapid expansion of free agency has yet to widely influence HR policies for traditional employees.

Despite the clear trend toward growing free agency across all generations in the workforce, it seems employers have yet to fully grasp what the free agency wave means to them—one in five workers report that their current employer does not offer flexible working arrangements such as flex-time or telecommuting. This has remained virtually unchanged since 2008 and shows that there is a growing gap between what workers want and what employers are offering.

Clearly, the mismatch between traditional employment models and what many experienced, highly skilled workers want is assisting the growth in free agency. It seems employers' lack of options in-house is pushing workers out on their own, only to re-engage on free agent terms.

To make the most of what free agents have to offer, organizations have to first learn how to adapt and integrate this flexible workstyle into their business processes and current company culture. This means forgoing traditional perceptions of employment.

Work is no longer the fixed, long-term proposition it once was and workers are gaining greater access to the flexible, engaging work they want. In response, organizations will need to re-educate themselves to bridge the gap between what they offer and what employees want, or risk losing out on this widely distributed, highly qualified talent pool.



08

CAPITALIZING ON THE FREE AGENT WORKSTYLE TREND

Organizations can take action now to be well positioned for the rising free agent population.



1. Ensure that free agents are included in your overall workforce strategy.

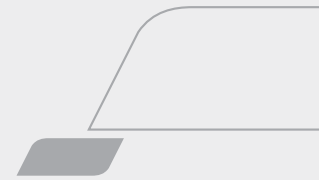
Design a flexible employment model with a purposeful mix of traditional and free agent talent. Consider maintaining only a staff of core personnel responsible for day-to-day operations and standard workflow. You also can leverage internal and external supply and demand data to manage your workforce ahead of market trends. When you experience rapid business ramp ups or seasonal demands for specialty skill sets, you can quickly bring in free agents with the required skills. This will ensure minimal down-time between projects, streamlined processes, and the added benefits of a constant influx of new ideas and expertise.

2. Know how you are currently using free agents.

To leverage your free agent talent pool it's important to know how much your organization already spends on free agent talent. How many free agents do you have? How are they being used? Where are they being used, and which projects are they supporting? A good way to begin your assessment is by comparing your facilities and IT access information with payroll data. Often times, free agents have access to your systems and facilities without being on your full-time payroll. With so many workers having access to your company, it is vital to know exactly who is working for you.

3. Evaluate departments, positions, and projects to see how they would benefit from free agent talent.

Pay particular attention to areas in your organization that require highly specialized skills, have constantly changing business demands, or involve project-based work assignments. Free agents can also be useful in functional areas such as employee training and mentoring. Many organizations utilize seasoned workers to train or mentor new employees. Workers with years of knowledge about your company culture, mission, and business goals are the best equipped to pass along that knowledge to new hires.



Many progressive companies have prioritized the workforce needs of areas within their organization that truly drive competitive differentiation. The goal is to have the most qualified, agile pool of talent available for these core competency areas. By concentrating on the critical functions and positions that support these key areas, these sophisticated companies are establishing a strategic advantage by leveraging talent in the most vital areas, at the right time and with the least amount of risk.

4. Understand the importance of your employer brand.

Remember that free agents are evaluating your reputation just as closely as you are evaluating them. Workers have online access to employer rating and recommendation sites such as [glassdoor.com](https://www.glassdoor.com)[™], as well as numerous social networking sites where they can easily share everything from their best assignment to their worst experience. Consider how workers perceive your employer brand and adjust things if and where you can. For example, review your career site, job ads, and recruiting collateral to be sure you promote your organization by emphasizing interesting work, flexibility, and opportunities to build skills.

5. Develop options for current employees.

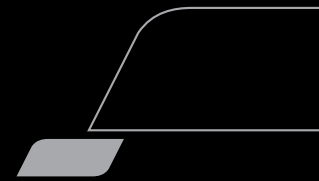
If you have traditional employees who are seeking more flexibility, consider developing free agent type paths for them so they are encouraged to stay engaged with your organization. You could also leverage the intellectual capital of alumni and retirees by implementing programs to engage these talent pools. These programs make it easier for companies to manage future risk and uncertainty by having access to a qualified, experienced talent pool. Seasoned workers who desire freedom and flexibility can also take advantage of these programs.

6. Understand the importance of properly classifying free agent workers.

There are significant risks involved with misclassification. Work closely with your legal team and your workforce solutions partner to navigate this complex employment environment.

7. Evaluate your workforce solutions partner.

Your workforce solutions partner should be an expert in the free agent population, advising you on insightful and innovative ways to access and optimize your entire pool of free agents to meet your business objectives. Be sure the company has the experience to help guide you along the way.



CONCLUSION

They're well-educated, highly skilled, and experienced. They're engaged, satisfied, and available. Free agents now account for more than four out of every 10 workers in the U.S., and there are more of them every year.

How employers tap into and harness this significant change to the employment market is in their hands. Faster, easier, and cheaper scalability of entire workforces is one clear advantage of engaging free agents, but there's a lot more to it.

When employers understand what makes free agents tick, they soon realize that this is a source of talent they're going to need if they're serious about gaining and sustaining a competitive advantage. Free agents have the experience to make a difference instantly, and they'll choose you as much as you choose them—and not just because of what you can pay them. It's a new kind of workplace relationship that, when harnessed correctly, can be a win-win for both sides.

Free agents have clearly indicated what they want, and they're out there getting it. Contingent work provides a better work-life balance, and working for a variety of employers helps develop their skills and experience, which increases their employability—they are building their competitive edge in line with the organizations they work for.

This new era of workforce flexibility has incredible potential, but it requires a new way of thinking about workforce strategy, talent acquisition, and management. First and foremost, companies will need to be proactive: learn about the free agent workstyle, make changes to leverage the many benefits this new workforce has to offer, and embrace free agency as not just a trend, but a new workforce paradigm that is shaping the future of business.



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We invite you to download our ebook, *10 Things You Need to Know About Free Agents*, or get the full research report, *The New Workforce: Insights into the Free Agent Workstyle*.



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