



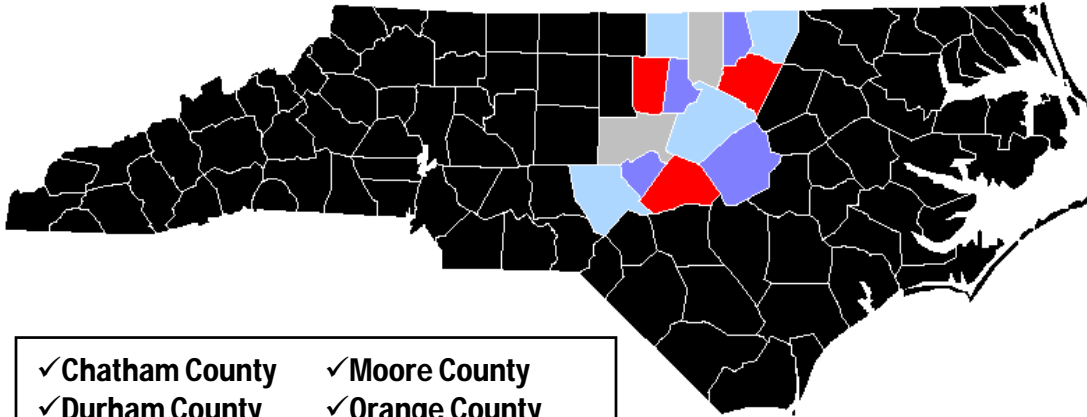
# Research Triangle

## State of the Region Report

### Industry and Occupation Focused

Capital Area Workforce Development Board

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- |                    |                 |
|--------------------|-----------------|
| ✓ Chatham County   | ✓ Moore County  |
| ✓ Durham County    | ✓ Orange County |
| ✓ Franklin County  | ✓ Person County |
| ✓ Granville County | ✓ Vance County  |
| ✓ Harnett County   | ✓ Wake County   |
| ✓ Johnston County  | ✓ Warren County |
| ✓ Lee County       |                 |

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## Forward

This report addresses the current economic state and the projected industry and occupational growth in the Research Triangle Region (2008-2014) by analyzing five layers of industry: super sectors, industry clusters, industries, career clusters, and occupations. An explanation of each layer is provided below.

- **Super Sector** – A group of related industries or occupations (EMSI)
- **Industry Cluster** – a group of industries closely connected by supply chains and/or similar labor pools (EMSI)
- **Industry** – a group of businesses that produce similar goods and services and share similar production processes for creating the goods and services they sell (EMSI)
- **Career Cluster** – a group of related occupations that involve similar tasks (EMSI)
- **Occupation** – a worker job description that contains a defined set of tasks and responsibilities (EMSI)

For the purpose of this report, a summary of the fastest growing components of each layer is provided. The largest industries and career clusters are also presented for the 2008 to 2014 time period. This classification is based on current and sustained presence in the Research Triangle Region determined by the number of jobs provided by these industries and career clusters.

Of all of the layers of industry, super sectors encompass the largest amount of layers (Graph 0.1). A super sector such as agriculture, forestry, fishing and hunting covers a broad spectrum of many industries. One example of an industry within this super sector is provided in Table 0.1.

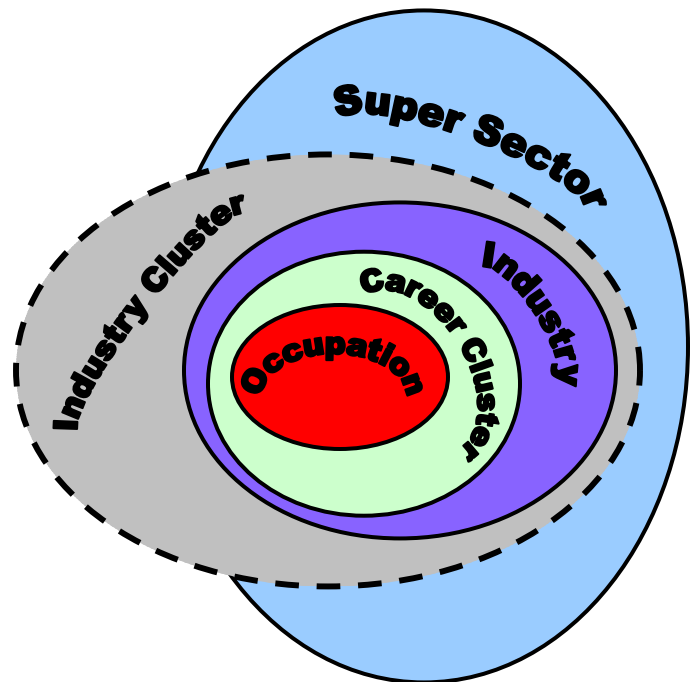
Table 0.1

Example of Industry Layers	
Super Sector	Agriculture, Forestry, Fishing, and Hunting
Industry Cluster	Agribusiness, Food Processing and Technology
Industry	Agriculture
Career Cluster	Crop Production
Occupation	Fruit and Tree Nut Farming

The next largest encompassing layer is the industry cluster. However, industry clusters do not neatly fit inside super sectors. Although this layer is made up of related industries, the industries are not necessarily related due to what they produce. Industry clusters are determined by how production takes place and how that product reaches the supplier and consumer. For example, agribusiness, food processing, and technology can encompass many industries including, but not limited to agriculture; textile production; greenhouse, nursery, and floriculture; etc. (EMSI). Whether these industries fit into a cluster depends on the existence of a relationship between the industries and the extent to which they affect one another.

Within industry clusters are industries such as those listed above. Career clusters make up the industry layer and are clustered depending on their product rather than their production tasks (EMSI). Career clusters are made up of individual occupations. Table 0.1 gives an example of an occupation within the crop production career cluster. However, occupations can often be further broken down into greater detail. For example, fruit and tree nut farming encompasses orange grove farming, apple orchard farming, almond farming, etc.

Graph 0.1



## Introduction

The 13 county Research Triangle Region is made up of a diverse population with a range of economic characteristics and needs. Represented in this region are counties whose population growth and economic growth are currently increasing above the state and national average, as well as counties who rank below the state and national average in both respects. The counties in this region also differ in the various industries that drive their individual economies and the job opportunities available in their specific areas. For the purpose of this report a general explanation of present industries and occupations, as well as their growth and wages, are provided to explain the region as a whole. However, differences in income distribution, wealth, population, and population growth are also noted in order to give a complete picture of the distinct counties that make up this region.

**Table 1.1**

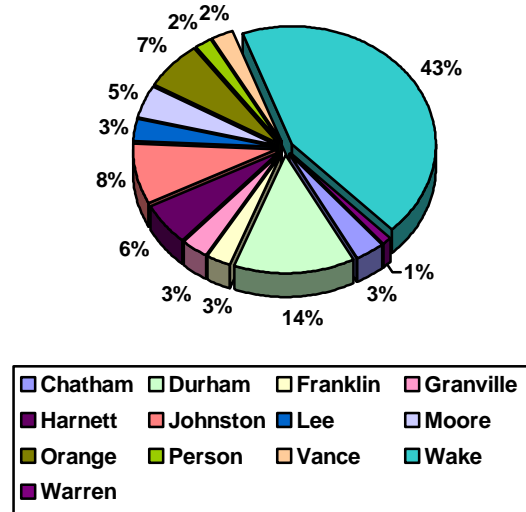
Rural vs. Urban Population* in 2000		
	% Rural	% Urban
Chatham	80.7%	19.3%
Durham	7.5%	92.5%
Franklin	91.3%	8.7%
Granville	65.6%	34.4%
Harnett	66.2%	33.8%
Johnston	68.4%	31.6%
Lee	48.1%	51.9%
Moore	58.7%	41.3%
Orange	32.0%	68.0%
Person	73.4%	26.6%
Vance	50.8%	49.2%
Wake	11.9%	88.1%
Warren	100%	0%

\*Based on data provided by NC Dept. of Commerce

Both urban and rural areas are represented in this region; in 2000 the most rural county, Warren County, had a 100% rural makeup, and the most urban county, Durham County, had a 92.5% urban makeup. The projected cumulative population of the region was 1,870,635 residents in 2007 and is expected to increase by approximately 14% by 2012, resulting in a population of over 2.1 million (NC Dept. of Commerce). Wake County is the most populated county expected to make up 43% of the cumulative population in 2007 (Graph 1.1) and is expected to have the greatest increase in population between 2007 and 2012. There is a large gap between

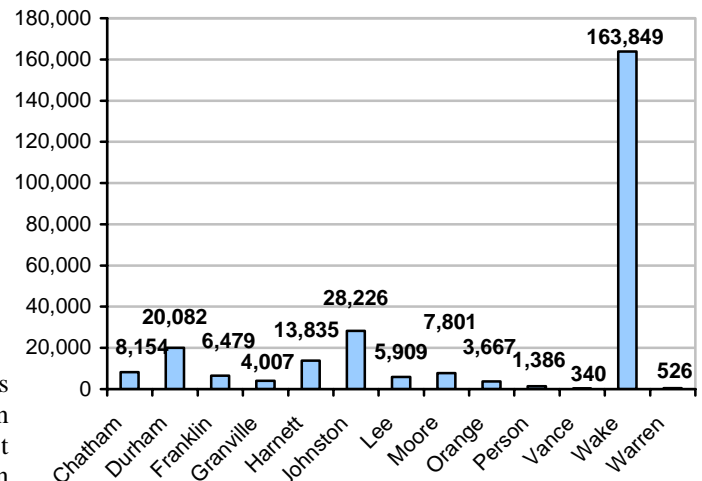
the most populated county and the second largest county, Durham County, which made up 14% of the total population. Vance County and Person County are the smallest counties, each making up 2% of the total population in 2007.

**Graph 1.1 Population Percentages  
By County 2007\***



\*Based on data provided by NC Dept. of Commerce

**Graph 1.2 Population Growth 2007-2012\***



\*Based on data provided by NC Dept. of Commerce

Multiple economic indicators are used in this report to demonstrate the state of the region. Flourishing metropolitan areas, like Wake County, can skew data and present a picture of the region that does not adequately represent the region as a whole. Thus, careful consideration of the diversity of each county is necessary for a true depiction of the state of

the region. The following economic indicators are used to fully explain the current state of the economy in the region:

- **Median Household Income** – allows for comparison of incomes across the region, as well as the state and national median, and is a better indicator than the average income because it is not significantly affected by extremely high or low incomes
- **Cost of Living Comparison** – allows for comparison of the cost of living across counties in the region, in the state, and nationally (cities with similar markets were used); allows for comparison of cost of living and average wages of industries and occupations addressed within the report
- **Per Capita Income** – allows for comparison at a regional, state, and national level as to how much each individual receives out of the total generated annual salary of the county
- **Family Income Growth** – shows the percentage growth in each income bracket and gives an indication of future distribution of income among families by examining projected future trends, family income growth is considered an important economic indicator
- **Unemployment** – provides implications of the state of the economy due to its tendency to rise as the economy weakens; allows comparison between region, the state, and the nation
- **Educational Attainment** – allows comparison of the level of education of the region’s population in comparison with the state and the nation and is an indication of economic opportunity and a predictor of personal income

### Median Household Income & Per Capita Income

In 2007 the median household income for all counties in the region, except for Franklin County, Vance County, and Warren County, was above the national median and the state median household income (Table 1.2). However, the only counties with both a median household income and per capita income above the state and national statistics were Orange County and Wake County. Table 1.2 shows that there is a significant gap in wealth between the

more urban counties and the rural counties. Wake County’s median household income and per capita income is approximately two times that of Warren County and Vance County. However, the cost of living in more urban areas generally requires a higher income to sustain an equal standard of living in more rural areas.

**Table 1.2**

Projected Income Indicators*				
	Median Household Income		Per Capita Income	
	2007	2012	2007	2012
Chatham	\$53,182	\$61,689	\$28,802	\$34,017
Durham	\$55,861	\$66,113	\$30,245	\$36,698
Franklin	\$47,512	\$53,886	\$21,686	\$25,224
Granville	\$49,186	\$56,621	\$22,353	\$26,265
Harnett	\$49,034	\$50,785	\$20,420	\$24,115
Johnston	\$51,896	\$61,205	\$23,373	\$27,888
Lee	\$48,307	\$54,918	\$23,471	\$27,366
Moore	\$51,658	\$63,851	\$29,989	\$35,532
Orange	\$54,157	\$63,851	\$35,229	\$42,723
Person	445,211	\$50,975	\$22,165	\$25,513
Vance	\$38,269	\$43,663	\$19,775	\$22,928
Wake	\$72,665	\$86,553	\$36,635	\$45,581
Warren	\$34,315	\$38,868	\$18,674	\$21,501
State	\$52,336	N/A	\$33,636	N/A
Nation	\$48,201	N/A	\$38,611	N/A
Region	\$49,702	\$57,633	\$25,524	\$30,335

\*Based on data and projection provided by NC Dept. of Commerce

### Cost of Living Comparison

Due to the available cost of living data being limited to metro areas only, the median annual salary of the Raleigh-Durham metro area was used as the standard for the purpose of comparing salaries in the region (Table 1.3). In comparison to other North Carolina metro areas, the cost of living in the Raleigh-Durham metro area is higher than any other metro, with the exception of the Charlotte metro area. In all other metro areas of North Carolina, an individual could sustain an equal standard of living with a lesser annual salary. However, a person residing and working in the Raleigh-Durham metro area, receiving the median annual salary of Wake County, which is \$49,702 (NC Dept. of Commerce), is not guaranteed to make the same salary with the same occupation in any of the other metro areas. Typically, a metro area with a lower cost of living also offers a lower annual salary. For example, employers in the Greensboro metro area, on average, pay approximately 2.9% less than an employer in the

Raleigh-Durham metro area for the same position. (Salary.com)

In March 2008 *Forbes Magazine* ranked the Raleigh metro area as the number one place for businesses and careers. Metro areas ranking 2<sup>nd</sup> through 5<sup>th</sup> on the list are also included in Table 1.3. *Forbes Magazine* found these metro areas to be comparative to the Raleigh metro area based on the following characteristics: number of colleges in the area, cost of doing business, cost of living, crime rate, culture and leisure, educational attainment, income growth, job growth, and net migration. The cost of living in the Raleigh-Durham metro area was also found to be higher than these metro areas.

**Table 1.3**

Equivalent Salary Comparison*		
Metro Area	Equivalent Salary	% Difference in Cost of Living
<b>Raleigh-Durham</b>	<b>\$49,702</b>	<b>N/A</b>
Asheville	\$46,454	-6.5%
Charlotte	\$51,218	3.1%
Fayetteville	\$44,757	-9.9%
Gastonia	\$42,118	-15.3%
Greensboro	\$47,614	-4.2%
High Point	\$44,688	-10.1%
Salisbury	\$43,426	-12.6%
Wilmington	\$47,360	-4.7%
Winston Salem	\$46,271	-6.9%
Boise, ID	\$44,154	-11.2%
Fort Collins, CO	\$46,242	-7.0%
Des Moines, IA	\$43,524	-12.4%
Lexington, KY	\$46,547	-6.5%

\*Based on data provided by www.salary.com

## Unemployment

In 2006, North Carolina's unemployment rate was 4.8%, a statistic shared by Orange County, Moore County, and Wake County (Table 1.4). The unemployment rates of Chatham County, Durham County, Franklin County, and Johnston County were less than the state rate or the national rate, which was 4.6%. The remaining counties in the region had unemployment rates that exceeded the national and the state averages.

Between the years of 2007 and 2012, it is projected that the region will add approximately 135,299 jobs, which is an average of over 27,000 jobs per year. Unemployment is projected to increase 1.5% over the five-year period. Table 1.4 shows the projected number of total residents in the workforce of the region, the projected number of unemployed, and the resulting unemployment rate.

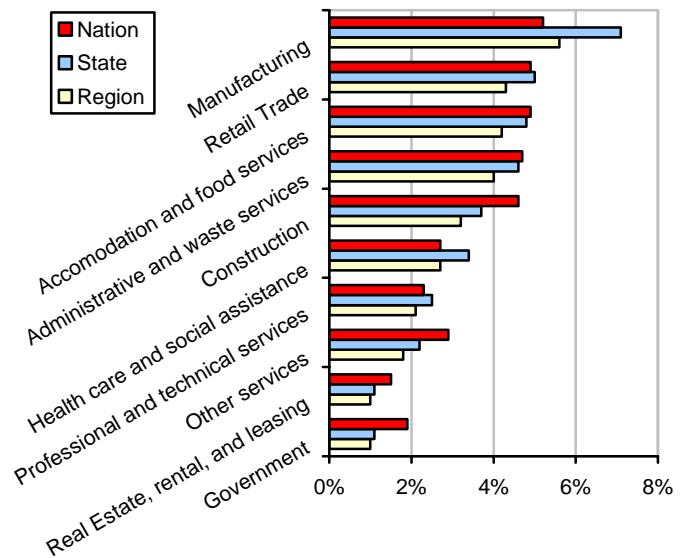
**Table 1.4**

Projected Workforce Vs. Projected Unemployment*			
	Workforce	Unemployed	Unemployment Rate
2007	953,980	38,419	4.0%
2012	1,089,279	59,862	5.5%

\*Based on data provided by NC Dept. of Commerce

In 2007, the manufacturing industry lost the greatest percentage of jobs overall in the region, the state, and the nation, with the state incurring the greatest percentage loss (Graph 1.3). The region lost a greater percentage of manufacturing jobs than the nation. However, the region fared better than the state and the nation in reference to job loss in all other major industries. Not only did North Carolina lose more jobs in manufacturing compared to the region and the nation, but also in retail trade, health care and social assistance, and professional and technical services.

**Graph 1.3 Unemployment Rate\***



\*Based on data provided by EMSI

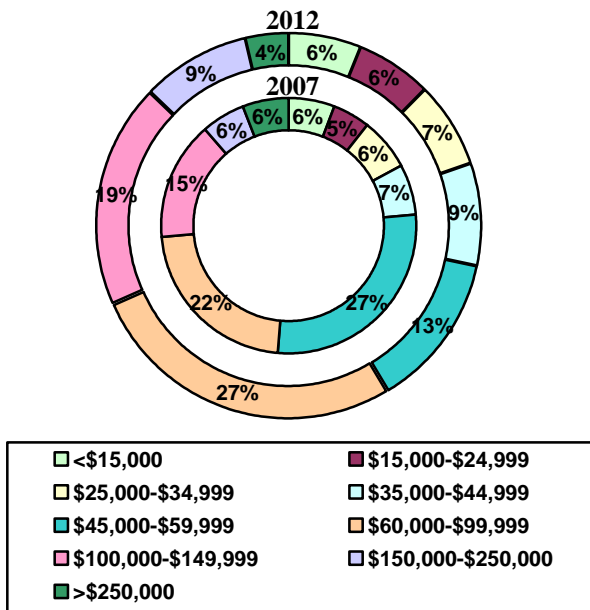
## Family Income & Growth

Graph 1.3 exhibits how income is distributed among families in the region – information that is used to calculate the poverty level. A family is determined to be living below the poverty line based on the number of related and unrelated members of their household and the total amount of monetary assets they annually receive. In 2007, the projected average number of members of a household in each

county of the region ranged between 2.4 and 2.6 people (NC Dept. of Commerce). During that year the poverty line was \$13,690 for a family of two and \$17,170 for a family of three (US Dept. of Health and Human Services). Thus, a family falling in this range of average number of household members with an annual cumulative income that falls in the <\$15,000 or \$15,000-\$24,999 range (depending on their exact number of household members) would be tagged as living below the poverty line.

Between the years of 2007 and 2012, an increase in wages is expected creating a decrease in the two least income brackets and an increase in almost all of the higher income brackets. The exception to this increase is the prediction that there will be a 2% decrease in the greatest income bracket (families that make over \$250,000 annually in income). An increase in wages does not necessarily signify an increase in the standard of living for those whose wages increase. Regular shifts in costs and wages due to inflation and the increase of minimum wage results in a continual increase in wages for most occupations and industries.

**Graph 1.3 Family Income Growth  
2007-2012**



**Educational Attainment**

The percentage of the population who graduated during the 2006-2007 school year in the age group of 15-19 years old was over 1% less than that of the nation and .08% less than those who graduated in the

state. However, it should be noted that a disproportionate amount of younger teenagers in the region could potentially skew data, thus misrepresenting the region’s education attainment level if graduation statistics are examined alone.

Although the percentage of the total population of ages 15-19 who graduated in 2007, is less than that of the state and the nation, the region fared much better when comparing region statistics for populations with some college and those with a post-graduate education to statistics for the state and the nation (Table 1.6). The percentage of residents aging 25+ in the region with some college education was about 8% more than that of the nation and about 10% more than that of the state. There were also approximately 3% more residents in the region with a postgraduate education than in the nation, and 5% more than in the state. The high percentage of college education in the region can be attributed to the region’s cluster of establishments of higher education with six community colleges and nine universities, three of which are University of North Carolina institutions and six of which are private institutions.

**Table 1.6**

Regional Educational Attainment*			
	Region	State	Nation
% of 15-19 Cohort High School Graduates	6.25%	6.33%	7.3%
% of 25+ Cohort with Some College Education	64.9%	55.12%	56.88%
% of 25+ Cohort with a Postgraduate Education	13.35%	8.21%	10.29%

\*Based on information provided by EMSI

**Housing Costs**

The median price of housing and rent are principal elements that attest to the affordability of an area based on an individuals’ current or projected income. The median housing prices, listed in the table, are a median of all towns/cities within each county. However, housing prices differ within counties as well, depending on whether a specific city is considered urban or rural, as well as other factors, which affect desirability of an area. For example, Chapel Hill has a significantly higher median housing price than any other town/city in Orange County due to factors such as proximity to a major public university and a reputedly high achieving city school system. Of all the counties in the Research Triangle Region in 2007, Orange County had the highest

median housing price of \$216,958 in 2007, while Warren County had the lowest median housing price at \$96,080 in the same year (Table 1.7). Wake County was a close second for highest median housing with a price of \$215,260.

**Table 1.7**

<b>Annual Housing Costs and Income Need**</b>				
	<b>2007 Median Housing Prices**</b>	<b>2007 Income Need***</b>	<b>2012 Median Housing Prices**</b>	<b>2012 Income Need***</b>
Chatham	\$146,197	\$43,826	\$193,462	\$57,995
Durham	\$183,277	\$54,942	\$207,254	\$62,130
Franklin	\$113,403	\$33,996	\$131,863	\$39,260
Granville	\$132,152	\$39,616	\$152,688	\$45,772
Harnett	\$121,199	\$36,266	\$139,495	\$41,817
Johnston	\$130,964	\$39,260	\$148,034	\$44,377
Lee	\$135,625	\$40,657	\$153,700	\$46,076
Moore	\$160,056	\$47,981	\$200,451	\$60,091
Orange	\$216,958	\$65,039	\$264,339	\$79,243
Person	\$122,414	\$36,697	\$140,956	\$42,255
Vance	\$106,522	\$31,933	\$124,383	\$37,737
Wake	\$215,260	\$64,529	\$244,928	\$73,426
Warren	\$96,080	\$28,800	\$117,165	\$35,123
Region	\$177,114	\$53,095	\$209,983	\$62,948

\*Based on projections from the NC Department of Commerce

\*\*All figures have been rounded to the nearest dollar

\*\*\*Based on 24% of income spent on housing and monthly payment of a 30-year 6% fixed income mortgage (US Dept. of Labor)

Median rental prices across counties in the Research Triangle Region are reflective of median housing prices (Table 1.8). Counties with more expensive median housing prices generally had higher median rental rates as well. Exceptions occurred among counties when ranked according to their housing prices. For example, although Wake County is the second highest in median housing prices in the county, it falls to third highest in median rental rates at \$503 per month. Orange County has the highest rental rates with a price of \$585 per month, followed by Durham County with a median rental price of \$554 per month. Comparative to its median housing price, in 2007 Warren County had the lowest median rent price of \$292 per month.

**Table 1.8**

<b>2007 Rent Prices, Income, and Wage Needs* **</b>			
	<b>2007 Monthly Rent Prices**</b>	<b>2007 Annual Income Need***</b>	<b>Hourly Wage Need****</b>
Chatham	\$785	\$28,260	\$14.72
Durham	\$785	\$28,260	\$14.72
Franklin	\$850	\$30,600	\$15.94
Granville	\$579	\$20,844	\$10.86
Harnett	\$536	\$19,296	\$10.05
Johnston	\$850	\$30,600	\$15.94
Lee	\$590	\$21,240	\$11.06
Moore	\$603	\$21,708	\$11.31
Orange	\$785	\$28,260	\$14.72
Person	\$551	\$19,836	\$10.33
Vance	\$520	\$18,720	\$9.75
Wake	\$850	\$30,600	\$15.94
Warren	\$530	\$19,080	\$9.94
Region	\$678	\$24,408	\$12.71

\* All figures have been rounded to the nearest dollar amount

\*\* (Quintero, et al); Calculated at the 40<sup>th</sup> percentile and based on a household of two-four members

\*\*\*Based on 33% of income spent on housing (Consumer Spending Report)

\*\*\*\*Based on an individual receiving pay for 52 weeks annually, and working 40 hours a week

Although counties such as Warren, Granville, and Johnston have the lowest median prices in the region, incomes cannot be equally transferred from county to county within the region. As stated above in the section “Cost of Living Comparison”, a job in one county may yield lower or higher pay if an individual moved to another county. Thus, an individual making \$40,000 a year in Moore County will most likely not receive equal income for the equivalent job in Chatham County. Typically an equivalent job transfer would yield lower wages in Chatham County. However, because the cost of living is lower in Chatham County than in Moore County, he/she may be able to enjoy the same standard of living as before with less income.

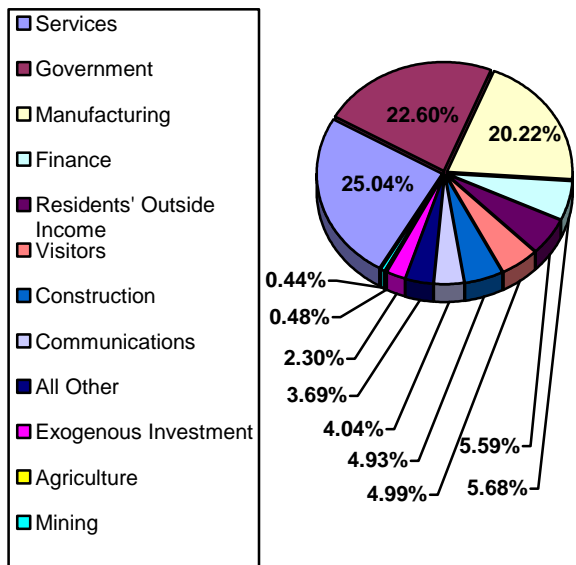
## **Driving Forces**

Raleigh, the region’s largest city, was picked by *Forbes Magazine* in April 2008 as one of their ten “recession-proof cities”, based on the expected growth of non-farm industries such as professional and business services, as well as education and health industries. *CNN Money* also heralded the opportunities in the metropolitan area of Raleigh, naming it as number three in its list of “America’s Best Jobs in the Hottest Markets”. This honor was

awarded based on Raleigh's projected two-year job growth (5.8%) and the opportunity for careers in technology, pharmaceuticals, and biotechnology.

However popular and growing the aforementioned industries are in the more populated areas, the region as a whole relies on various other industries, which act as major source of jobs and earnings. In 2007, the greatest source of jobs in the region was the service industry providing over 25% of the region's jobs (over 290,000 jobs) followed by the government, which provided over 22% of the region's jobs (over 260,000 jobs) (Graph 2.1). The manufacturing industry was a very close third, providing a significant amount of jobs (over 20%) to the region's job market (Graph 2.1).

**Graph 2.1 Provision of Jobs by Industry 2007\***

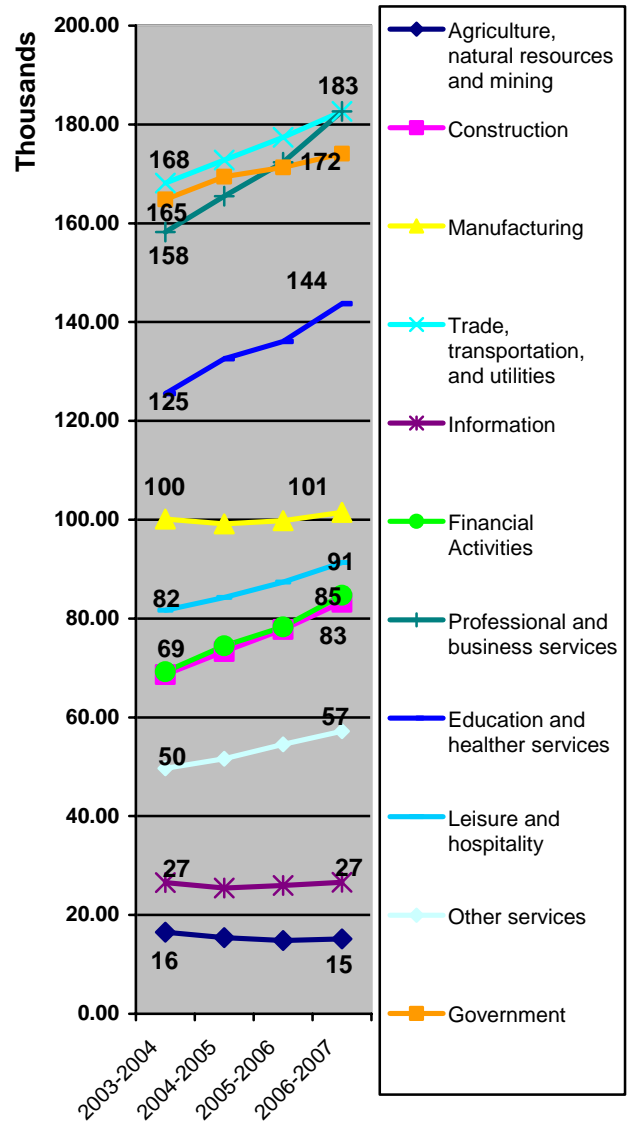


\*Based on data provided by EMSI

During the past four years, 2003 to 2007, the financial activities industry increased the number of jobs they provided to the region growing to 26% of all jobs in the Research Triangle Region (Graph 2.2). This was the highest industry growth in the region with the addition of approximately 16,000 new jobs. Having similar growth, the construction industry grew by 25% and gained 14,000 new jobs, suggesting a correlation between the two fastest growing industries in past years. This correlation between industries may be related to the fact that the Raleigh metro area is one of the fastest growing areas in the nation ranking 23<sup>rd</sup> out of 287 total areas nationwide in home appreciation (MSN Money), resulting in high growth in population and land development. The professional and business services industry

increased the amount of jobs they provided in the region by 19%, which was a growth of approximately 30,000 jobs. The agriculture, natural resources, and mining industry and the information industry had negative growth during the time frame (information reflects no loss in the Graph 2.2 because loss was less than 1,000 jobs). Although manufacturing remained one of the largest industries in the region, it made only 2% growth during the past five years.

**Graph 2.2 Industry Growth 2003-2007\***



\*Based on data provided by EMSI

Trends in job growth in the Research Triangle Region were somewhat similar to trends over the past five years at the state level, with the region faring better overall in job growth (Table 2.2). Construction and financial activities were the fastest growing

industries statewide. Negative growth also occurred statewide in the agriculture, natural resources, and mining industry. North Carolina experienced a decrease of 8% in the manufacturing industry, although there was no loss at the regional level. The information industry did not have significant growth at the state level, but lost jobs at the regional level. Overall, the amount of jobs increased by 14% in the region, as opposed to the state's increase of 11%

**Table 2.2**

<b>Region vs. State Job Growth* 2007-2008</b>		
	<b>2007</b>	<b>2008</b>
Agriculture, nat. resources, and mining	-6%	-6%
Construction	25%	23%
Manufacturing	2%	-8%
Trade, transportation and utilities	11%	9%
Information	-1%	2%
Financial activities	26%	22%
Prof. and business services	19%	18%
Education. and health services	17%	16%
Leisure and hospitality	15%	16%
Other services	18%	14%
<b>Total</b>	<b>14%</b>	<b>11%</b>

\*Based on data provided by EMSI

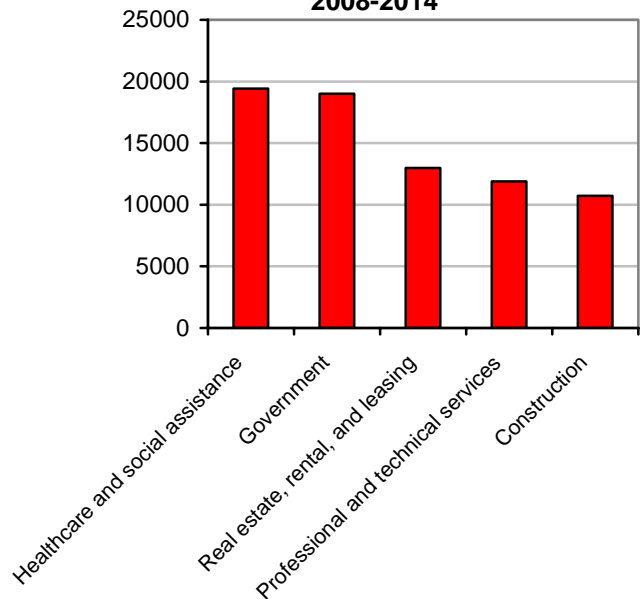
### **Top Super Sector Growth**

The Research Triangle Region is expected to undergo substantial growth in several major industry clusters from 2008-2014. The top five industry clusters in the six year time period, based on their projected growth in the region are as follows: health care and social assistance; government; real estate, rental, and leasing; professional and technical services; and construction (Graph 3.1). Although predominately urban counties are predicted to acquire the most significant number of jobs, more rural counties are predicted to experience the greatest percentage growth in the fastest growing industry clusters. (For a complete definition of each industry cluster addressed, see Appendix A).

Healthcare and social assistance is expected to be the number one fastest growing industry with the addition of 19,412 jobs to the region (Graph 3.1). The government super sector is projected to be a close second, adding 18,995 jobs to the region

between the years 2008 and 2014. All of the industry clusters mentioned above are predicted to each add over 10,000 jobs to the Research Triangle Region for a combined total of over 70,000 additional jobs added during the six-year time period from these five industries alone.

**Graph 3.1 Added Jobs in Top 5 Super Sectors  
2008-2014\***



\*Based on data provided by EMSI

### **Healthcare and Social Assistance**

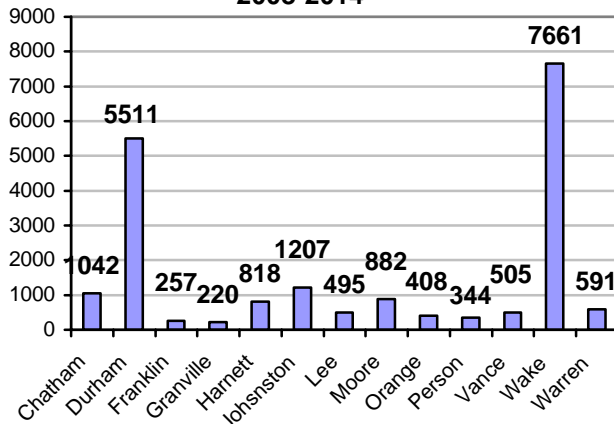
From 2008-2014, Wake County is expected to experience the greatest increase in the number of jobs in the healthcare and social assistance super sector with the addition of over 7,000 jobs (Graph 3.2). Durham County is predicted to incur the second greatest increase in this particular super sector, gaining over 5,500 jobs.

Projections show that there will be a significant difference in the number of jobs added to the other counties in the Research Triangle Region. The remaining counties are projected to add in the range of slightly over 1,200 jobs in Johnston County to as little as 220 jobs in Granville County.

It may seem that the establishment of major hospitals in these two counties are the cause of such substantial growth that is lacking in the other counties. However, Orange County is also home to a nationally acclaimed hospital and is expected to add only 408 jobs during the time period. The major difference, in fact, lies in the urban population of Wake County and Durham County. As established urban counties these two counties areas have made the necessary adjustments to serve their growing

population, resulting in an expansive industry that addresses health and social needs. However, the number of added jobs tells only one part of the story, while percentage growth in the individual counties offers additional insight into how this super sector is growing in the Research Triangle Region.

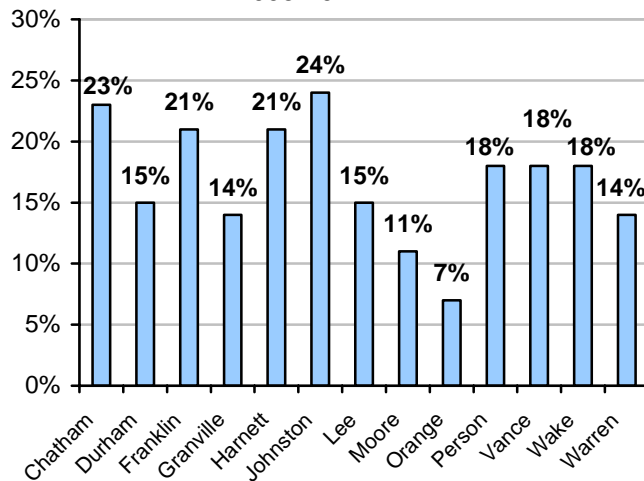
**Graph 3.2 Healthcare and Social Assistance Jobs Added by County\* 2008-2014**



\*Based on data provided by EMSI

Predicted to experience the most significant percentage growth of all the counties in the region are two mostly rural counties; Johnston County with 24% job growth and Chatham County with 23% job growth. Franklin County and Harnett County are also expected to incur major growth in this super sector, both expectedly experiencing an increase of 21% in the number of jobs during the six-year period. Further illustrating the correlation between population and this industry, these four counties are the only counties in the region (with the exception of Wake County) having a projected population growth over 11% from 2008-2014.

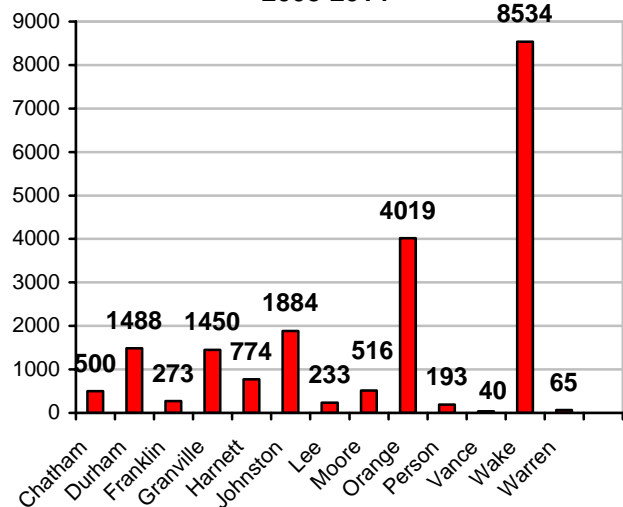
**Graph 3.3 Healthcare and Social Assistance Jobs Growth by County\* 2008-2014**



## Government

By 2014, Wake County is predicted to add the most government jobs in the region with the addition of 8,534 jobs (Graph 3.4). This projection is mainly due to Wake's current base of government jobs due to its position as the capital city of North Carolina, the second most populated county in the state, and home to the second and eighth most populated cities in the state (Raleigh and Cary). Orange County is expected to add approximately half the amount of government jobs as Wake County, having the second largest addition of government jobs between 2008 and 2014.

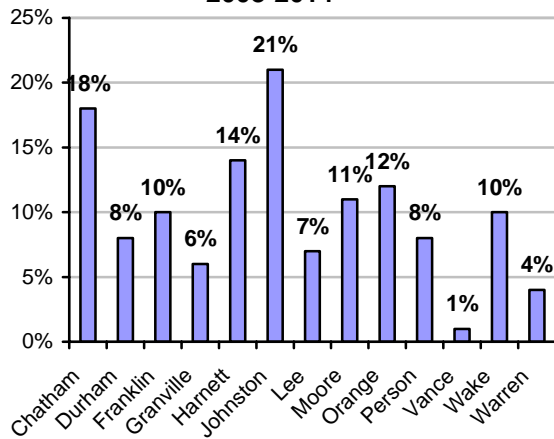
**Graph 3.4 Government Jobs Added by County 2008-2014\***



\*Based on data provided by EMSI

Johnston County is projected to have the highest percentage growth in government jobs with 21% job growth by 2014 (Graph 3.8). Chatham County is expected to have the second largest percentage growth with an 18% increase in jobs. These two counties are predicted to have growth well above the other counties in the region, experiencing 4%-7% more growth than any other county. Although Wake County is projected to experience the greatest growth, in terms of the number of jobs added, the jobs in this super sector will only increase by 10% by 2014. While this is a substantial increase for a six year time period, Wake County's growth is approximately average compared to the region as a whole.

**Graph 3.4 Government Job Growth by County  
2008-2014\***



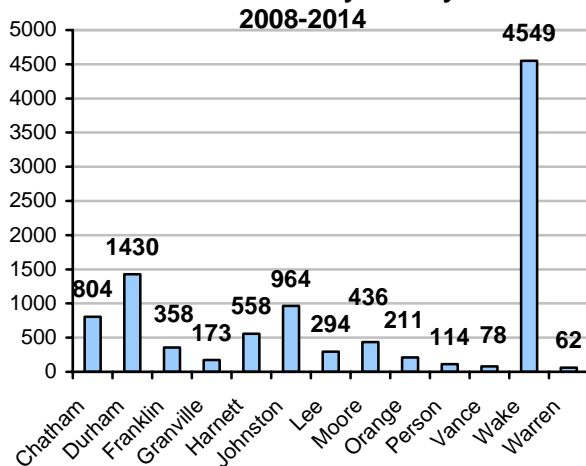
\*Based on data provided by EMSI

### Real Estate, Rental, and Leasing

As in other major industry clusters, Wake County is expected to add substantially more jobs than other counties in the region, but even more drastically so in the real estate, rental, and leasing cluster. Housing one of the fastest growing metropolitan areas in the county, it can be expected that real estate offices and occupations will significantly increase as housing markets in many other parts of the country plummet.

The second largest addition of real estate, rental, and leasing occupations in the region is far behind Wake County in terms of the number of jobs it is expected to add; Durham County is expected to add 1,430 jobs. Johnston County is predicted to have the third largest increase in jobs with the addition of 964 jobs within the county's borders.

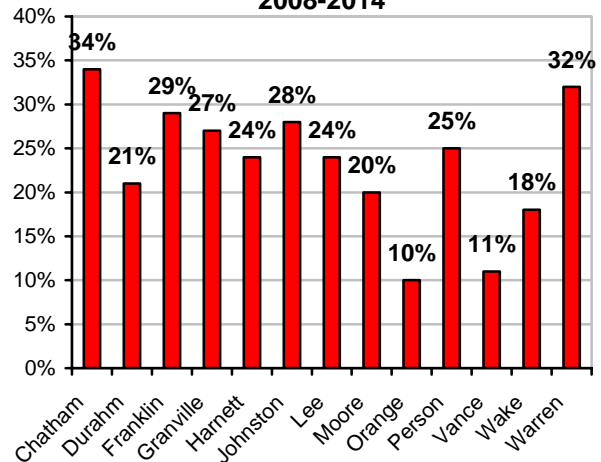
**Graph 3.7 Real Estate, Rental, and Leasing  
Jobs Added by County  
2008-2014**



Percentage growth in the real estate, rental, and leasing super sector is markedly dissimilar than that of other top super sectors in the area (Graph 3.6). Every county in the region is expected to have substantial growth in jobs within this cluster. The largest job growth is expected to occur in Chatham County with a 34% increase in jobs for this super sector.

Warren County is a close second for the largest increase with a projection of 32% growth in real estate, rental, and leasing jobs. Other counties predicted to experience high percentage growth are Franklin County with 29% growth and Johnston County with 28% growth. Johnston County appears near the top of the list for increased growth in all top industry clusters.

**Graph 3.6 Real Estate, Rental, and Leasing  
Job Growth by County\*  
2008-2014**

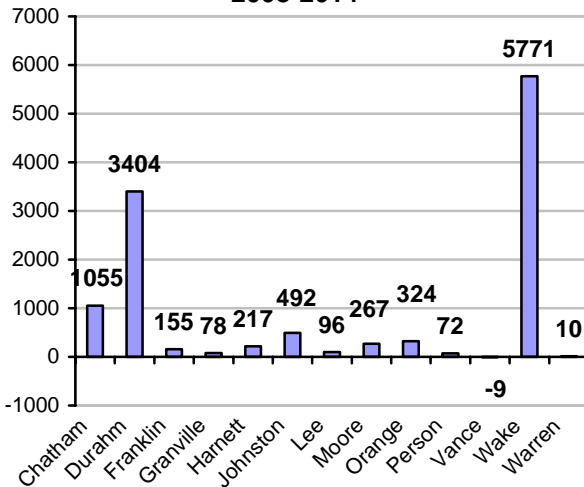


\*Based on data provided by EMSI

### Professional and Technical Services

Although professional and technical services is one of the top five super sectors, in terms of the projected addition of jobs in the region, the majority of jobs expected to be added to the region by 2014 will occur in only two of the counties. With the largest number of added jobs, Wake County is expected to add 5,771 professional and technical services jobs by 2014 and Durham County, with the second largest addition, is expected to add 3,404 jobs. The total of all added jobs projected for the other eleven counties in the region does not equal the total added jobs projected for these two mostly urban counties.

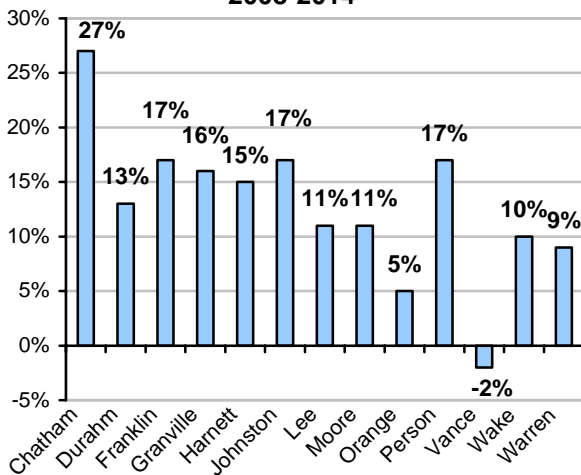
**Graph 3.7 Professional and Technical Services Jobs Added by County\* 2008-2014**



\*Based on data provided by EMSI

By 2014, ten out of thirteen counties are expected to have growth at or above 10% in the professional and technical services industry cluster. Chatham County is predicted to have the greatest job growth, with a 27% increase in the number of current jobs in this super sector during the six-year period. The second highest projected increase during the same period is shared by three counties; Franklin County, Johnston County, and Person County are all projected to have a 17% increase in jobs for this super sector. Vance County is the only county projected to actually lose jobs in this cluster with a 2% loss of jobs.

**Graph 3.6 Professional and Technical Services Job Growth by County\* 2008-2014**

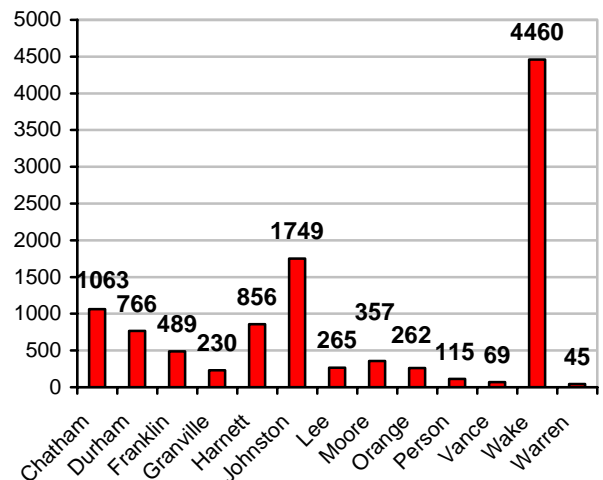


\*Based on data provided by EMSI

## Construction

The top three counties, determined by the number of added jobs, within the construction super sector are as follows: Wake County with 4,460 added jobs, Johnston County with 1,749 added jobs, and Chatham County with 1,063 added jobs. These three counties make up the majority of regional additions to the construction job market. However, only the second and third ranking county, in terms of added jobs, have comparably some of the highest percentage growth in this same industry cluster.

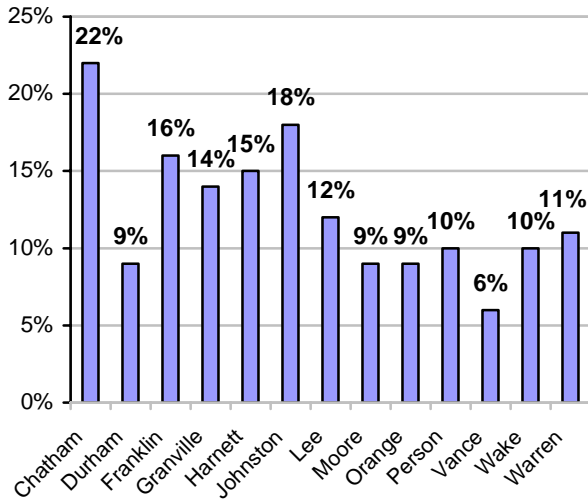
**Graph 3.6 Construction Jobs Added by County 2008-2014\***



\*Based on data provided by EMSI

The construction job market in Chatham County is predicted to significantly increase during the 2008-2014 time period with a growth of 27% (Graph 3.7). Johnston County is also expected to have a notable increase in the number of construction related jobs, with a growth of 18%. Other high growth counties within the field of construction are Franklin County with 16% growth, Harnett County with 15% growth, and Granville County with 14% growth. All counties are projected to have 10% growth or higher, with the exception of Vance County and Durham County.

**Graph 3.7 Construction Job Growth by County 2008-2014\***



\*Based on data provided by EMSI

**Fastest Growing Industry Clusters**

The projected fastest growing industry cluster between 2008 and 2014 for the Research Triangle Region is the biomedical/biotechnical industry cluster (Table 4.1). This specific industry cluster is expected to add approximately 18,124 jobs to the region – a growth of 18%. The business and financial services industry cluster is also expected to grow substantially, adding about 16,400 jobs between 2008 and 2014 in the region. This is a growth of 13% based on their current status across the thirteen counties. (For a complete list of industries included in each industry cluster, see Appendix B)

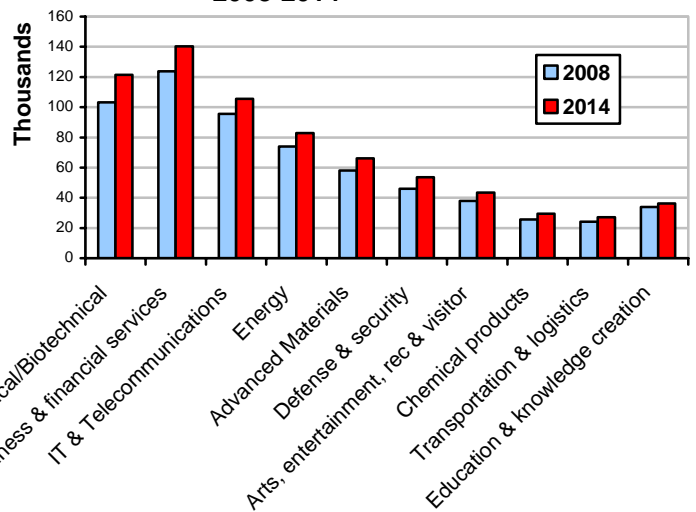
Experiencing the second highest percentage growth according to economic predictions, defense and security is expected to grow by 17% with the addition of 7,615 jobs. Arts, entertainment, recreation and visitor industries is projected to have the same percentage growth as the chemicals and chemical based products industry cluster, each having a growth of 14%. Arts, entertainment, recreation and visitor industries will expectedly add 5,463 jobs while chemical and chemical products will add approximately 1,200 less with the addition of 3,672 jobs.

**Table 4.1**

Fastest Growing Industry Clusters* 2008-2014				
	2008 Jobs	Added Jobs	% Change	2007 Average Income
Biomedical/ Biotechnical (life sciences)	103,245	18,124	18%	\$63,264
Business and financial services	123,801	16,400	13%	\$63,378
Information technology & telecommunications	95,498	9,946	10%	\$96,741
Energy (fossil & renewable)	74,056	8,900	12%	\$65,619
Advanced materials	57,966	8,219	14%	\$105,565
Defense & security	46,052	7,615	17%	\$71,126
Arts, entertainment, recreation & visitor industries	38,021	5,463	14%	\$24,568
Chemicals & chemical based products	25,681	3,672	14%	\$101,455
Transportation & logistics	24,252	2,955	12%	\$42,573
Education & knowledge creation	33,900	2,348	7%	\$41,150

\*Based on data provided by EMSI

**Graph 4.1 Industry Cluster Growth 2008-2014\***



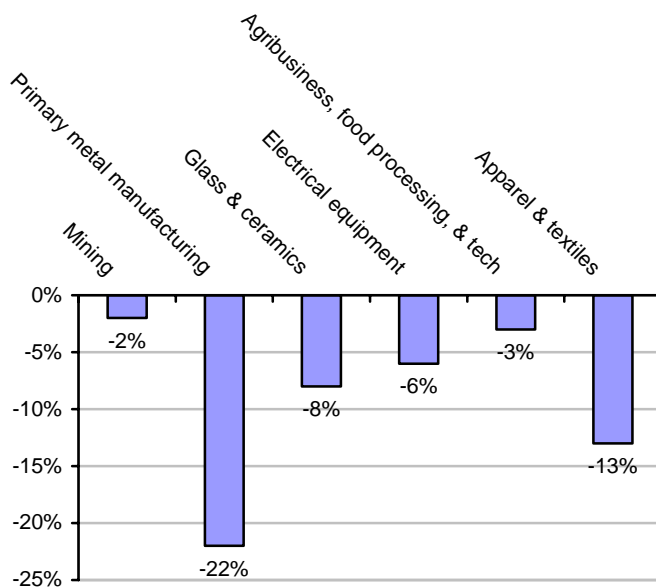
\*Based on data provided by EMSI

## Declining Industry Clusters

The Research Triangle Region will not only experience substantial growth in major industry clusters, but is projected to also experience job loss. Graph 4.2 shows the greatest percentage of job loss expected to occur to the following industry clusters: mining; primary metal manufacturing; glass and ceramics; electrical equipment, appliance and component manufacturing; agribusiness, food processing and technology; apparel and textiles. Primary metal manufacturing is expected to incur the greatest percentage of job loss with a loss of 22% of this workforce (approximately 106 jobs).

Apparel and textiles is projected to incur the second greatest percentage of job loss, but also the greatest amount of total job loss, losing 1,412 jobs (13% of their current workforce), according to predictions. Although agribusiness, food processing, and technology is predicted to incur only 3% loss of their workforce, the industry cluster is expected to experience the second greatest loss of actual jobs expectedly losing 666 jobs between 2008 and 2014.

**Graph 4.2 Declining Industry Clusters  
Job Decrease 2008-2014\***



\*Based on data provided by EMSI

## Fastest Growing & Largest Industries

From 2008-2014, the largest industries in the region are also projected to be the fastest growing industries. It is projected that the number one fastest growing industry by 2014 will be administrative and waste services with the addition of 17,296 jobs, growing by 22% over the six-year period (Table 5.1). This industry consists of organizations that support the daily functions of other organizations, sometimes operated internally. This includes, "office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services," (NAICS). (For a complete definition of each industry, see Appendix C).

Other fast growing industries include real estate, rental, and leasing with a growth of 20% in regional jobs, and health care and social assistance with a growth of 17% in its job market. The real estate, rental, and leasing industry is mainly comprised of establishments that allow the usage of their products, both tangible and intangible, for a fee. An example of tangible products is consumer goods; trademarks are an example of an intangible good provided by this industry. Health care and social assistance programs are comprised of establishments that offer health care services and social assistance services separately, as well as those that offer both services jointly.

Out of the fastest growing industries, health care and social assistance, is projected to add the most jobs between 2008-2014, with 17% growth and the addition of 19,412 jobs. The government is expected to experience the second largest addition to jobs, adding 18,995 according to predictions, while administrative and waste services is projected to incur the third highest addition of jobs with the addition of 17,296 jobs.

Of all the fastest growing industries, manufacturing had the highest average income with employees of this industry earning \$88,704 on average. Professional and technical services rank second according to average income in 2007 with annual wages averaging \$63,350.

**Table 5.1**

<b>Fastest Growing and Largest Industries* 2008-2014</b>			
	<b>Added Jobs</b>	<b>% Change</b>	<b>2007 Average Income</b>
Administrative and waste services	17,296	22%	\$29,049
Real estate and rental and leasing	10,033	20%	\$41,291
Healthcare and social assistance	19,412	17%	\$43,612
Professional and technical services	11,884	12%	\$63,350
Construction	10,729	12%	\$44,148
Accommodation and food services	8,736	12%	\$17,336
Retail trade	12,978	11%	\$27,248
Government	18,995	10%	\$53,739
Other services, except public administration*	5,223	9%	\$21,286
Manufacturing	4,406	4%	\$88,704

\*Based on data provided by EMSI

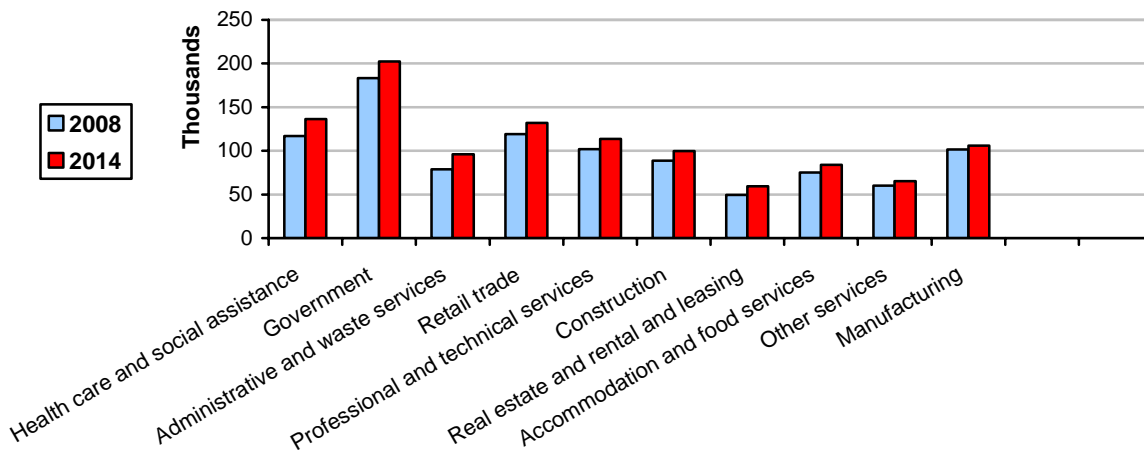
\*\*Includes, but not limited to machinery repairing, administering religious activities, grant making, advocacy, dry cleaning and laundry services, personal care services, death care services, etc.

### Largest Career Clusters

The largest career cluster, projected for 2008-2014, is retail sales workers who currently make up over 60,000 jobs in the Research Triangle job market (Table 6.1). This career cluster is projected to add 7,120 jobs by 2014, an increase of 12%, the largest amount of added jobs of all occupations in the largest occupations group. (For a complete definition of career clusters, see Appendix D).

The other management occupations career cluster (the second largest career cluster) is expected to add 5,193 jobs – a 10% growth. Although it is expected to add fewer jobs than the majority of the other top ten largest career clusters, other management occupations is expected to remain as the second largest career cluster with the addition of these jobs. The average hourly wage of this career cluster is a competitive wage of \$28.28 per hour.

**Graph 5.1 Fastest Growing and Largest Industries\***



\*Based on data provided by EMSI

**Table 6.1**

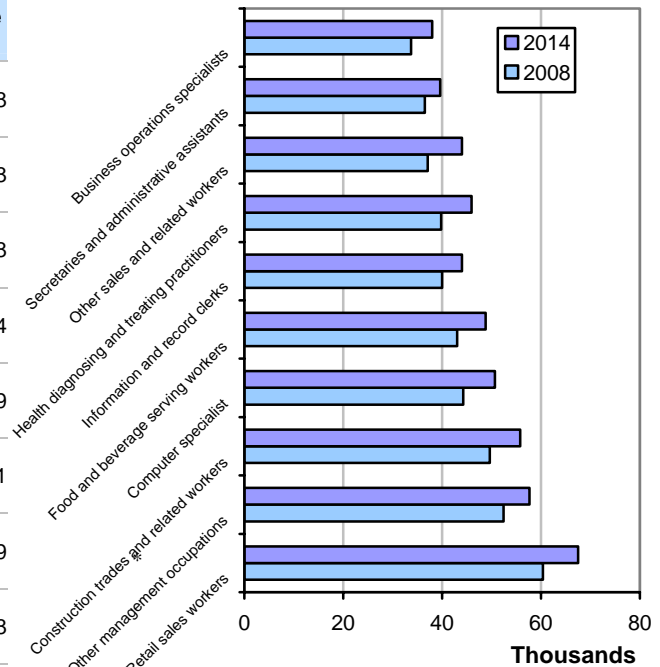
<b>Largest Career clusters*</b> 2008-2014				
	<b>2008 Jobs</b>	<b>Added Jobs</b>	<b>% Change</b>	<b>2007 Average Hourly Wage</b>
Retail sales workers	60,399	7,120	12%	\$9.48
Other management occupations*	52,447	5,193	10%	\$28.28
Construction trades and related worker	49,268	6,192	12%	\$16.68
Computer specialists	44,285	6,420	14%	\$36.14
Food and beverage serving workers	43,025	5,776	13%	\$7.19
Information and record clerks	40,002	3,994	10%	\$14.01
Health diagnosing and treating practitioners	39,795	6,186	16%	\$38.99
Other sales and related workers***	37,071	6,948	19%	\$12.48
Secretaries and administrative assistants	36,525	3,094	8%	\$15.35
Business operations specialists	33,699	4,326	13%	\$23.98

\*Based on data provided by EMSI

\*\*Includes but is not limited to directors and managers of agriculture, construction, education, engineering, food service, funerals, gaming, lodging, medical and health services, etc. \*\*includes, but is not limited to, product promoters, real estate brokers and sales agents, sales engineers, telemarketers, miscellaneous sales and related workers (US Dept. of Labor)

Additional career clusters in this list offering competitive hourly wages include computer specialists with an average of \$36.14 per hour, as well as health diagnosing and treating practitioners, receiving \$38.99 per hour on average. Computer specialists are expected to add 6,420 jobs to the regional job market over the six year time period, which is an increase of 12%. Health diagnosing and treating practitioners will expectedly add 6,186 jobs, an increase of 16% to the Research Triangle job market.

**Graph 6.1 Largest Occupations Growth\***



Based on data provided by EMSI

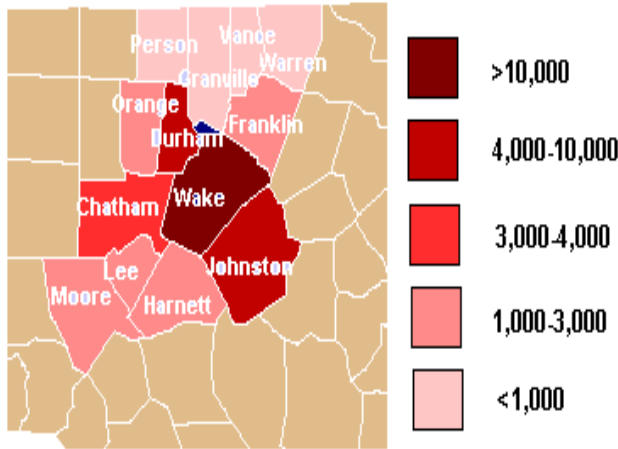
**Distribution of Jobs**

The addition of jobs in the largest career clusters is dependent on various factors such as current presence of industry in each county, population growth of each county, alignment of educational attainment of population and occupation requirements, etc. From 2008 –2014 in the Research Triangle area, it is projected that Wake County will have the highest addition of jobs in the largest career clusters with the addition of 26,700 jobs, a growth of 13% (Graph 6.2). Durham County and Johnston County will both experience substantial gains in jobs of the largest occupations groups with the addition of 9,929 jobs in Durham County and 4,878 jobs in Johnston County. Chatham County will have the fourth largest growth in terms of additional jobs added. However, similarly to Chatham County’s relationship with job growth within the fastest growing industries, the county will have the largest percentage growth in the region with an increase of 22% (Table 5.2).

Predominantly rural counties in the northern part of the region will experience the least amount of added jobs in the largest career clusters, which must

be taken into consideration with their comparatively smaller populations among the counties in the Research Triangle Region. In spite of this, both Granville County and Person County are expected to have percentage growth that rivals the growth of much more populated and urban counties in the region.

**Graph 6.2 Distribution of Jobs by County 2008-2014\***



\*Based on data provided by EMSI

**Table 6.2**

Distribution of Jobs By County* 2008-2014		
	Added Jobs	% Change*
Wake	26,700	13%
Durham	9,929	11%
Johnston	4,878	19%
Chatham	3,135	22%
Orange	2,598	9%
Harnett	2,140	15%
Moore	1,770	11%
Franklin	1,229	16%
Lee	1,073	11%
Granville	704	10%
Person	687	12%
Vance	283	5%
Warren	125	8%

\*All percentages have been rounded to the nearest 1%

\*\*Based on data provided by EMSI

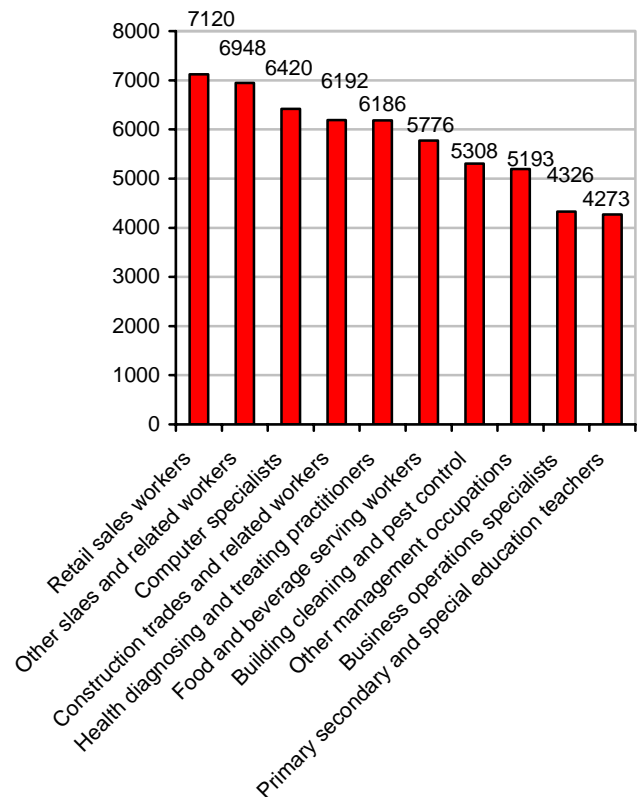
## Fastest Growing Career Clusters

Some overlap exists between the fastest growing career clusters and the largest career clusters. For example, retail sales workers appears near the top of both lists due to the projected addition of 7,120 jobs to the region during the six-year time period plus their current and growing presence in the Research Triangle Region (Graph 7.1). (For a complete definition of all career clusters, see Appendix D).

However, two career clusters are expected to make substantial growth in the region, despite their lack of “large career cluster” status. Building cleaning and pest control workers is one of these fast growing career clusters, with an expected addition of 5,308 jobs from 2008-2014 – a growth of 17% and the second highest percentage growth of all career clusters (Table 7.1).

Primary, secondary, and special education teachers are also predicted to be one of the top ten fastest growing career clusters. By adding 4,273 jobs to the Research Triangle Region, this career cluster will increase their workforce by 13%. This substantial addition of child educators is an obvious prediction in a region experiencing significant population growth.

**Graph 7.1 Added Jobs in Fastest Growing Career clusters 2008-2014\***



**Table 7.1**

<b>Fastest Growing Career Clusters*</b>			
2008-20014			
	<b>Added Jobs</b>	<b>% Change</b>	<b>2007 Average Hourly Wage</b>
Retail sales workers	7,120	12%	\$9.48
Other sales and related workers	6,948	19%	\$12.48
Computer Specialists	6,420	14%	\$36.14
Construction trades and related workers	6,192	12%	\$16.68
Health diagnosing and treating practitioners	6,186	16%	\$38.99
Food and beverage serving workers	5,776	13%	\$7.19
Building cleaning and pest control	5,308	17%	\$8.42
Other management occupations***	5,193	10%	\$28.28
Business operations specialists	4,326	13%	\$23.98
Primary, secondary, and special education teachers	4,273	13%	\$21.25

\*Based on data provided by EMSI

\*\*includes, but is not limited to, product promoters, real estate brokers and sales agents, sales engineers, telemarketers, miscellaneous sales and related workers (US Dept. of Labor)

\*\*\* includes but is not limited to directors and managers of agriculture, construction, education, engineering, food service, funerals, gaming, lodging, medical and health services, etc.

classification also includes real estate sales agents that represent the buyer, as well as those that represent the seller.

Also among occupations within the fastest growing industries, registered nurses are predicted to be the second fastest growing occupation. This occupation also boasts the highest average income in this group making \$27.48 an hour on average. The number of registered nursing jobs is expected to increase by 18% from 2008-2014. Although the minimum educational attainment for a registered nurse is a two-year associate's degree in nursing, this classification also includes advanced practice nurses who have a specialization and an advanced degree beyond an associate's degree.

An additional occupation within this group, offering a competitive hourly wage, is first-line supervisors/managers of retail sales workers receiving \$17.05 an hour on average. This occupation is expected to grow by 12% during the six year time period. Employers of this occupation require that employees have work skills in a related field, which often translates to sustained work experience in an entry-level retail position and a demonstration of managerial skills.

Also requiring education beyond short-term training, executive secretaries and administrative assistants are required to have moderate-term on-the-job training. On average this occupation receives an hourly pay of \$16.55. This classification does not include secretaries and usually involves advanced administrative support. During the years between 2008 and 2014, the number of jobs of this occupation is expected to increase by 12% in the Research Triangle Region.

## **Fastest Growing Occupations**

Contributing to the fastest growing industries are occupations that are outpacing other occupations in the Research Triangle job market (Table 5.2). The increase in the number of jobs of these occupations is consistent with state growth of 13% and exceeds national growth of 11%. The overall average hourly pay of these occupations also exceeds that of the state by 83 cents, but falls below the national coverall average hourly pay by six cents. (For a complete description of occupations, see Appendix E.)

Real estate sales agents are projected to be the fastest growing occupation in the region according to the number of jobs added from 2008-2014. The projected increase in the number of real estate agents can be mainly attributed to the expected growth of the Raleigh metro area in the near future. This

**Table 5.2**

<b>Fastest Growing Occupations *</b> 2008-2014			
	<b>% Change</b>	<b>Hourly Earnings</b>	<b>Education Level</b>
Real estate sales agents	22%	\$13.87	Postsecondary vocational award
Registered nurses	18%	\$27.48	Associate's Degree
Janitors and cleaners	16%	\$8.85	Short-term on-the-job training
Combined food preparation and serving workers	16%	\$6.99	Short-term on-the-job training
Cashiers	7%	\$8.22	Short-term on-the-job training
Retail salespersons	15%	\$9.88	Short-term on-the-job training
First-line supervisors/managers of retail sales workers	12%	\$17.05	Work experience in a related field
Executive secretaries and administrative assistants	12%	\$16.55	Moderate-term on-the-job training
Office-clerks, general	11%	\$12.43	Short-term on-the-job training
Waiters and waitresses	10%	\$7.16	Short-term on-the-job training

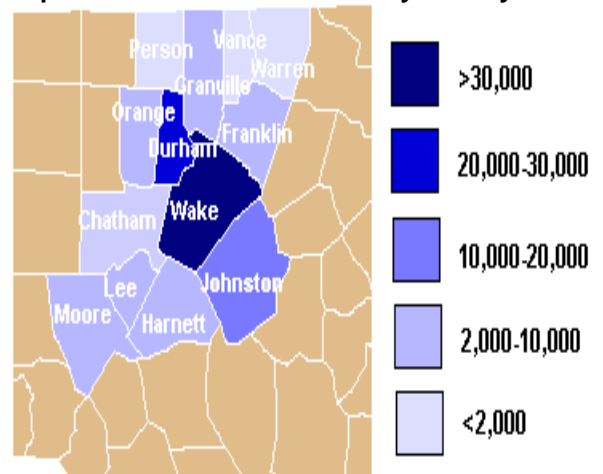
\*Based on data provided by EMSI

**Distribution of Jobs**

The fastest growing occupations in the fastest growing industries group are currently not distributed equally among counties (Graph 5.2). Wake County is expected to have the largest amount of job growth in this career cluster in terms of number of jobs added, with over 50,000 added jobs between 2008 and 2014 (Table 5.3). Durham County is projected to have the second largest amount of job growth in this career cluster, but with approximately 29,000 jobs less than Wake County, showing a disparity in the number of jobs between Wake County and the other counties in the region. Of these occupations, it is expected that Durham will add over 21,000 jobs.

Johnston County is projected to increase the most in the region in terms of percentage of jobs added in the fastest growing industries. Of the fastest growing occupations, Johnston County will expectedly have an increase of 22% and will add 13,785 jobs, the third highest addition of jobs in the Research Triangle Region. Vance County and Warren County are projected to experience the least amount of growth in terms of number of jobs of the fastest growing occupations. Warren County's job growth may seem minor when examining only number of added jobs. However, they expectedly will add to their workforce by 10%, which is comparable to many other counties in the region who are predicted to add far more jobs to their workforce.

**Graph 5.2 Distribution of Jobs by County\***



\*Based on data provided by EMSI

**Table 5.3**

<b>Distribution of Jobs By County*</b> 2008-2014		
	<b>Added Jobs</b>	<b>% Change**</b>
Wake	50,589	11%
Durham	21,572	12%
Johnston	13,785	22%
Orange	7,473	10%
Chatham	7,080	21%
Harnett	5,383	16%
Moore	3,623	10%
Lee	3,080	10%
Granville	2,463	11%
Franklin	2,445	13%
Warren	451	10%
Person	1,310	10%
Vance	438	3%

\*Based on data provided by EMSI

\*\*All percentages have been rounded to the nearest 1%

## Appendix A

Super Sectors Defined*	
Industry Cluster	Definition
Construction	<p>The construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites also are included in this sector.</p> <p>Construction work done may include new work, additions, alterations, or maintenance and repairs. Activities of these establishments generally are managed at a fixed place of business, but they usually perform construction activities at multiple project sites. Production responsibilities for establishments in this sector are usually specified in (1) contracts with the owners of construction projects (prime contracts) or (2) contracts with other construction establishments (subcontracts).</p>
Government	<p>Comprises all establishments within the federal government and all state and local government. For a complete list of agencies, please see <a href="http://www.census.gov/cgi-bin/epcd/srchnaics07defs">http://www.census.gov/cgi-bin/epcd/srchnaics07defs</a>.</p>
Healthcare and Social Assistance	<p>Comprises establishments providing health care and social assistance for individuals. The sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities. The industries in this sector are arranged on a continuum starting with those establishments providing medical care exclusively, continuing with those providing health care and social assistance, and finally finishing with those providing only social assistance. The services provided by establishments in this sector are delivered by trained professionals. All industries in the sector share this commonality of process, namely, labor inputs of health practitioners or social workers with the requisite expertise. Many of the industries in the sector are defined based on the educational degree held by the practitioners included in the industry.</p>
Professional, and Technical Services	<p>Comprises establishments that specialize in performing professional and technical activities for others. These activities require a high degree of expertise and training. The establishments in this sector specialize according to expertise and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, and technical services.</p>
Real Estate, Rental, and Leasing	<p>The Real Estate and Rental and Leasing sector comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services. The major portion of this sector comprises establishments that rent, lease, or otherwise allow the use of their own assets by others. The assets may be tangible, as is the case of real estate and equipment, or intangible, as is the case with patents and trademarks.</p>

\*Industry clusters defined according to the US Census Bureau North American Industry Classification System (NAICS)

## Appendix B

<b>Industry Clusters</b> Comprised Industries (Fastest Growing Only)		
Industry Cluster	Industries	
Biomedical/biotechnical (life sciences)	<ul style="list-style-type: none"> <li>• Pharmaceutical and Medicine Manufacturing,</li> <li>• Veterinary Services,</li> <li>• Management of Companies and Enterprises,</li> <li>• Scientific Research and Development Sciences,</li> <li>• Ambulatory Healthcare Services,</li> <li>• Paperboard Container Manufacturing,</li> <li>• Industrial Gas Manufacturing,</li> </ul>	<ul style="list-style-type: none"> <li>• Dental Laboratories, Surgical Appliance and Supplies Manufacturing,</li> <li>• Surgical and Medical Instrument Manufacturing,</li> <li>• Sanitary Paper Product Manufacturing,</li> <li>• Other Animal Food Manufacturing,</li> <li>• Electro-medical and Electrotherapeutic Apparatus Manufacturing,</li> <li>• Hospitals</li> </ul>
Business & financial services	<ul style="list-style-type: none"> <li>• Finance and Insurance</li> <li>• Securities, Commodity Contracts, and Other Financial Investments and Related Activities</li> <li>• Couriers and Messengers</li> <li>• Funds, Trusts, and Other Financial Vehicles</li> <li>• Credit Intermediation and Related Activities</li> <li>• Automotive Equipment Rental and Leasing</li> <li>• Air Transportation</li> <li>• Textile Bag and Canvas Mills</li> <li>• Lessors of Non-financial Intangible Assets (except Copyrighted Works)</li> </ul>	<ul style="list-style-type: none"> <li>• Accounting, Tax Preparation, Bookkeeping, and Payroll Services</li> <li>• Traveler Accommodation</li> <li>• Management Consulting Services</li> <li>• Software Reproducing</li> <li>• Manifold Business Forms Printing</li> <li>• Legal Services</li> <li>• Primary Support Services</li> </ul>
Information technology & telecommunications	<ul style="list-style-type: none"> <li>• Telecommunications</li> <li>• Primary Battery Manufacturing</li> <li>• Personal and Household Goods Repair and Maintenance</li> <li>• Telephone Apparatus Manufacturing</li> <li>• Oil and gas field machinery and equipment manufacturing</li> <li>• Electronic and Precision Equipment Repair and Maintenance</li> <li>• Fiber Optic Cable Manufacturing</li> <li>• Other Communication and Energy Wire Manufacturing</li> <li>• Custom Computer Programming Services</li> <li>• Computer Systems Design Services</li> <li>• Management, Scientific, and Technical Consulting Services</li> <li>• Computer Systems Design and Related Services</li> <li>• Data Processing, Hosting, and Related Services</li> <li>• Facilities Support Services</li> </ul>	<ul style="list-style-type: none"> <li>• Office Administrative Services</li> <li>• Home Health Care Services</li> <li>• Support Activities for Mining</li> <li>• Management Consulting Services</li> <li>• Architectural, Engineering, and Related Services</li> <li>• Business Support Services</li> <li>• Software Publishers</li> <li>• Other Support Services</li> <li>• Specialized Design Services</li> <li>• Other Professional, Scientific, and Technical Services</li> <li>• Educational Services</li> <li>• Internet Service Providers, Web Search Portals, and Data Processing Services</li> <li>• Scientific Research and Development Services</li> <li>• Religious, Grant making, Civic, Professional, and Similar Organizations</li> </ul>
Energy (fossil & renewable)	<ul style="list-style-type: none"> <li>• Lessors of Non-financial Intangible Assets (except Copyrighted Works)</li> <li>• Nitrogenous Fertilizer Manufacturing</li> <li>• Petroleum Refineries</li> <li>• Supportive Activities for Oil and Gas Operations</li> <li>• Natural Gas Distribution</li> <li>• Oil and Gas Field Machinery and Equipment Manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>• Construction Machinery Manufacturing</li> <li>• Mining Machinery and Equipment Manufacturing</li> <li>• Oil and Gas Extraction</li> <li>• Energy Assistance Programs</li> <li>• Energy Consulting Services</li> <li>• Energy Development and Conservation Agencies</li> </ul>

	<ul style="list-style-type: none"> <li>• Custom Computer Programming Services</li> <li>• All Other Petroleum and Coal Products Manufacturing</li> <li>• Electric Power Generation, Transmission and Distribution</li> </ul>	<ul style="list-style-type: none"> <li>• Energy Development and Conservation Program, Government</li> <li>• Energy Program Administration</li> <li>• Alternative Energy (e.g., Geothermal, Ocean Wave, Solar, Wind) Structure Construction</li> </ul>
Advanced materials	<ul style="list-style-type: none"> <li>• Carbon and Graphite Product Manufacturing</li> <li>• Plastic Material &amp; Resin Manufacturing</li> <li>• Plastics Packaging Materials, Film &amp; Sheet</li> <li>• Plastics Pipe, Fittings, and Profile Shapes</li> <li>• Laminated Plastic Plate, Sheet, and Shapes</li> <li>• Plastics Bottle Manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>• Plastics Plumbing Fixtures and All Other Plastics Products</li> <li>• Rubber and Plastics Hose and Belting Manufacturing</li> <li>• Resilient Floor Covering Manufacturing</li> <li>• Foam Product Manufacturing</li> <li>• Tire Manufacturing</li> <li>• Other Rubber Product Manufacturing</li> </ul>
Defense & security	<ul style="list-style-type: none"> <li>• Investigation and Security Services</li> <li>• Services to Buildings and Dwellings</li> <li>• Small Arms Manufacturing</li> <li>• Security and Fire System, Installation Only</li> </ul>	<ul style="list-style-type: none"> <li>• Security Guard Training</li> <li>• Security Safes Merchant Wholesalers</li> <li>• Security Systems Services</li> </ul>
Arts, entertainment, recreation & visitor industries	<ul style="list-style-type: none"> <li>• Sound Recording Industries</li> <li>• Independent Artists, Writers, and Performers</li> <li>• Performing Arts, Spectator Sports, and Related Industries</li> <li>• Management of Companies and Enterprises</li> <li>• Breakfast Cereal Manufacturing</li> <li>• Photographic Services</li> <li>• Internet Service Providers, and Web Search Portals</li> <li>• Performing Arts Companies</li> <li>• Amusement, Gambling, and Recreation Industries</li> <li>• Office Supplies (except Paper) Manufacturing</li> <li>• Commercial and Industrial Machinery and Equipment Rental and Leasing</li> <li>• Advertising and Related Services</li> <li>• Other Personal Services</li> </ul>	<ul style="list-style-type: none"> <li>• Dolly, Toy, and Game Manufacturing</li> <li>• Software Publishers</li> <li>• Motion Picture and Video Industries</li> <li>• Educational Services</li> <li>• Household Vacuum Cleaner Manufacturing</li> <li>• Toilet Preparation Manufacturing</li> <li>• Travel Arrangement and Reservation Services</li> <li>• Specialized Design Services</li> <li>• Sporting and Athletic Goods Manufacturing</li> <li>• Spectator Sports</li> <li>• Prerecorded Compact Disc (except Software), Tape, and Record Producing</li> <li>• Magnetic and Optical Recording Media Manufacturing</li> <li>• Independent Artists, Writers, and Performers</li> </ul>
Chemicals & chemical based products	<ul style="list-style-type: none"> <li>• Pesticide and Other Agricultural and Chemical Manufacturing</li> <li>• Soap and Other Detergent Manufacturing</li> <li>• Noncellulosic Organic Fiber Manufacturing</li> <li>• Cellulosic Organic Fiber Manufacturing</li> <li>• Synthetic Rubber Manufacturing</li> <li>• Surface Active Agent Manufacturing</li> <li>• Plastics Material and Resin Manufacturing</li> <li>• Other Basic Organic Chemical Manufacturing</li> <li>• All Other Miscellaneous Chemical Product and Preparation Manufacturing</li> <li>• Adhesive Manufacturing</li> <li>• All Other Industrial Machinery Manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>• Synthetic Dye and Pigment Manufacturing</li> <li>• Polish and Other Sanitation Good Manufacturing</li> <li>• Petrochemical Manufacturing</li> <li>• Plastics Product Manufacturing</li> <li>• Toilet Preparation Manufacturing</li> <li>• Other Rubber Product Manufacturing</li> <li>• Flavoring Syrup and Concentrate Manufacturing</li> <li>• Paint and Coating Manufacturing</li> <li>• Office Supplies (except Paper) Manufacturing</li> <li>• Other Basic Inorganic Chemical Manufacturing</li> <li>• Resilient Floor Covering Manufacturing</li> </ul>
Transportation & logistics	<ul style="list-style-type: none"> <li>• Transportation and Warehousing</li> <li>• Transportation by Spacecraft, Freight</li> <li>• Transportation Departments, Nonoperating</li> </ul>	<ul style="list-style-type: none"> <li>• Transportation Regulatory Agencies</li> <li>• Transportation Safety Program, Government</li> <li>• Transit Advertising Services</li> </ul>

	<ul style="list-style-type: none"> <li>• Transportation Equipment and Supplies (except Marine Pleasure Craft, Motor Vehicles) Merchant Wholesalers</li> <li>• Transportation Equipment Manufacturing</li> <li>• Transportation Equipment Seating Manufacturing</li> <li>• Transportation Management Consulting Services</li> </ul>	<ul style="list-style-type: none"> <li>• Transit and Ground Passenger Transportation</li> <li>• Transit Systems and Authorities, Nonoperating</li> <li>• Transit Systems, Mixed Mode (e.g., Bus, Commuter Rail, Subway Combinations)</li> </ul>
Education & knowledge creation	<ul style="list-style-type: none"> <li>• Education Offices, Nonoperating</li> <li>• Education Program Administration</li> <li>• Education Statistic Centers, Government</li> <li>• Education Building Construction</li> <li>• Educational Consultants</li> <li>• Educational Guidance and Counseling Services</li> <li>• Educational Services</li> <li>• Educational Support Services</li> <li>• Educational Test Evaluation Services</li> <li>• Educational Testing Services</li> <li>• Educational Trusts, Awarding Grants</li> <li>• College Board Preparation Centers</li> <li>• College Entrance Exam Preparation</li> <li>• College Selection Services</li> </ul>	<ul style="list-style-type: none"> <li>• Colleges, Universities, and Professional Schools</li> <li>• Colleges, Community</li> <li>• Colleges, Junior</li> <li>• Professional Development Training</li> <li>• School Boards, Elementary and Secondary</li> <li>• School Book Publishers and Printing</li> <li>• School Building Construction</li> <li>• School Bus Services</li> <li>• School Districts, Elementary or Secondary</li> <li>• School Furniture Manufacturing and Wholesalers</li> <li>• School Supply Stores</li> <li>• School Textbook Publishers</li> <li>• School Uniform Stores</li> <li>• Schools, Secondary</li> </ul>

\*Industry clusters defined according to the US Census Bureau North American Industry Classification System (NAICS) and Kelton, Pasqual, and Rebelein (1996)

## Appendix C

Industries Defined*	
Industry	Definition
Accommodation and food services	Comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption. The sector includes both accommodation and food services establishments because the two activities are often combined at the same establishment.
Administrative and waste services	Comprises establishments performing routine support activities for the day-to-day operations of other organizations. These essential activities are often undertaken in-house by establishments in many sectors of the economy. The establishments in this sector specialize in one or more of these support activities and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services.
Construction	See "Construction" definition in Appendix A
Government	See "Government" definition in Appendix A
Health care and social assistance	See "Healthcare and social assistance" definition in Appendix A
Manufacturing	<p>The Manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. The assembling of component parts of manufactured products is considered manufacturing, except in cases where the activity is appropriately classified in Sector 23, Construction.</p> <p>Establishments in the Manufacturing sector are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment. However, establishments that transform materials or substances into new products by hand or in the worker's home and those engaged in selling to the general public products made on the same premises from which they are sold, such as bakeries, candy stores, and custom tailors, may also be included in this sector. Manufacturing establishments may process materials or may contract with other establishments to process their materials for them. Both types of establishments are included in manufacturing.</p>
Other services, except public administration	<p>The Other Services (except Public Administration) sector comprises establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment and machinery repairing, promoting or administering religious activities, grant making, advocacy, and providing dry cleaning and laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services</p> <p>Private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of the household are included in this sector.</p>

Professional and technical services	See "Professional and technical services" definition in Appendix A
Real estate, rental, and leasing	See "Real Estate, rental, and leasing" definition in Appendix A
Retail Trade	<p>The Retail Trade sector comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.</p> <p>The retailing process is the final step in the distribution of merchandise; retailers are, therefore, organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers: store and non-store retailers.</p> <ol style="list-style-type: none"> <li>1. Store retailers operate fixed point-of-sale locations, located and designed to attract a high volume of walk-in customers. In general, retail stores have extensive displays of merchandise and use mass-media advertising to attract customers. They typically sell merchandise to the general public for personal or household consumption, but some also serve business and institutional clients. These include establishments, such as office supply stores, computer and software stores, building materials dealers, plumbing supply stores, and electrical supply stores. Catalog showrooms, gasoline services stations, automotive dealers, and mobile home dealers are treated as store retailers.</li> <li>2. Non-store retailers, like store retailers, are organized to serve the general public, but their retailing methods differ. The establishments of this sub-sector reach customers and market merchandise with methods, such as the broadcasting of "infomercials," the broadcasting and publishing of direct-response advertising, the publishing of paper and electronic catalogs, door-to-door solicitation, in-home demonstration, selling from portable stalls (street vendors, except food), and distribution through vending machines. Establishments engaged in the direct sale (non-store) of products, such as home heating oil dealers and home delivery newspaper routes are included here.</li> </ol>

\*Industries defined according to the US Census Bureau North American Industry Classification System (NAICS)

## Appendix D

Career clusters Defined*	
Career cluster	Definition
Building cleaning and pest control workers	Includes building cleaning workers such as janitors and cleaners, maids and housekeeping cleaners, all other building cleaning workers, and pest control workers.
Business operations specialists	Includes agents and business managers of artists, performers and athletes; buyers and purchasing agents; claims adjusters, appraisers, examiners, and investigators; compliance officers (except agriculture, construction, health and safety, and transportation); estimators; emergency management specialists; human resources, training, and labor relations specialists; logisticians; management analysts; meeting and convention planners; miscellaneous business operations specialists
Computer specialists	Includes computer and information research scientists; computer programmers; computer software engineers; computer support specialists; computer systems analysts; database administrators; network and computer systems administrators; network systems and data communications analysts; miscellaneous computer specialists
Construction trades and related workers	Includes boilermakers; brick masons, block masons, and stonemasons; carpenters; carpet, floor and tile installers and finishers; cement masons, concrete finishers, and terrazzo workers; construction laborers; construction equipment operators; drywall installers, ceiling tile installers, and tapers; electricians; glaziers; insulation workers; painters and paperhangers; pipe layers, plumbers, pipe fitters, and steamfitters; plasterers and stucco masons; reinforcing iron and rebar workers; roofers; sheet metal workers; structural iron and steel workers
Food and beverage serving workers	Includes bartenders; fast food and counter workers; waiters and waitresses; food servers, non-restaurant
Health diagnosing and treating practitioners	Includes chiropractors; dentists; dietitians and nutritionists; optometrists; pharmacists; physicians and surgeons; physician assistants; podiatrists; registered nurses; therapists; veterinarians; miscellaneous health diagnosing and treating practitioners
Information and record clerks	Includes brokerage clerks; correspondence clerks; court, municipal, and license clerks; court, municipal, and license clerks; credit authorizers, checkers and clerks; customer service representatives; eligibility interviewers, government program; file clerks; hotel, motel, and resort desk clerks; interviewers, except eligibility and loan; library assistants, clerical; loan interviewers and clerks; new accounts clerks; order clerks; human resources assistants, except payroll and timekeeping; receptionists and information clerks; reservation and transportation ticket agents and travel clerks; miscellaneous information and record clerks
Other sales and related workers	Includes models, demonstrators, and product promoters; real estate brokers and sales agents; sales engineers; telemarketers; miscellaneous sales and related workers
Primary, secondary, and special education teachers	Includes preschool and kindergarten teachers, elementary and middle school teachers, secondary school teachers, special education teachers,
Retail sales workers	Includes cashiers, counter and rental clerks and parts salespersons, retail salespersons
Secretaries and administrative assistants	Includes executive secretaries and administrative assistants, legal secretaries, medical secretaries, miscellaneous secretaries

\*Occupations defined according to the U.S. Dept. of Labor Standard Occupation Classification System

## Appendix E

Occupations Defined*	
Occupation	Definition
Cashiers, except gaming	Receive and disburse money in establishments other than financial institutions. Usually involves use of electronic scanners, cash registers, or related equipment. Often involved in processing credit or debit card transactions and validating checks.
Combined food preparation and serving workers, including fast food	Perform duties that combine both food preparation and food service.
Executive secretaries and administrative assistants	Provide high-level administrative support by conducting research, preparing statistical reports, handling information requests, and performing clerical functions such as preparing correspondence, receiving visitors, arranging conference calls, and scheduling meetings. May also train and supervise lower-level clerical staff.
First-line supervisors/managers of retail sales workers	Directly supervise sales workers in a retail establishment or department. Duties may include management functions, such as purchasing, budgeting, accounting, and personnel work, in addition to supervisory duties.
Janitors and cleaners, except maids and housekeeping cleaners	Keep buildings in clean and orderly condition. Perform heavy cleaning duties, such as cleaning floors, shampooing rugs, washing walls and glass, and removing rubbish. Duties may include tending furnace and boiler, performing routine maintenance activities, notifying management of need for repairs, and cleaning snow or debris from sidewalk.
Office clerks, general	Perform duties too varied and diverse to be classified in any specific office clerical occupation, requiring limited knowledge of office management systems and procedures. Clerical duties may be assigned in accordance with the office procedures of individual establishments and may include a combination of answering telephones, bookkeeping, typing or word processing, stenography, office machine operation, and filing.
Real estate sales agents	Rent, buy, or sell property for clients. Perform duties, such as study property listings, interview prospective clients, accompany clients to property site, discuss conditions of sale, and draw up real estate contracts. Include agents who represent buyer.
Registered nurses	Assess patient health problems and needs, develop and implement nursing care plans, and maintain medical records. Administer nursing care to ill, injured, convalescent, or disabled patients. May advise patients on health maintenance and disease prevention or provide case management. Licensing or registration required. Include advance practice nurses such as: nurse practitioners, clinical nurse specialists, certified nurse midwives, and certified registered nurse anesthetists. Advanced practice nursing is practiced by RNs who have specialized formal, post-basic education and who function in highly autonomous and specialized roles.
Retail salespersons	Sell merchandise, such as furniture, motor vehicles, appliances, or apparel in a retail establishment.
Waiters and waitresses	Take orders and serve food and beverages to patrons at tables in dining establishment. Exclude "Counter Attendants, Cafeteria, Food Concession, and Coffee Shop"

\*Occupations defined according to the U.S. Dept. of Labor Standard Occupation Classification System

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