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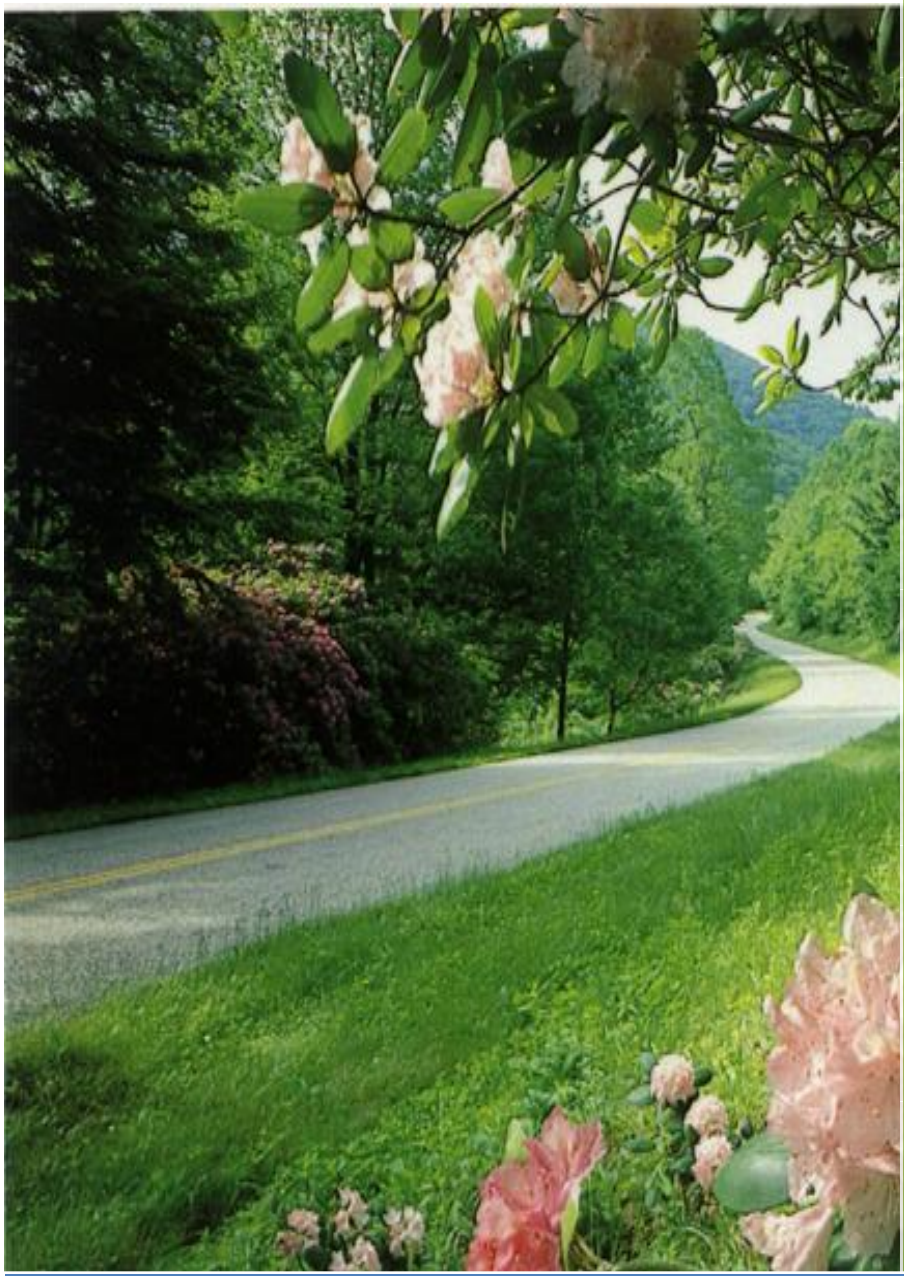

The State of Our Region's Economy and Workforce

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1/1/2010

An Update to the 2005 Pee Dee and Regional Partnership Regions' State of the Workforce Report

Prepared by

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INTRODUCTION

Welcome to the 2010 State of the Workforce Report for the Pee Dee and Regional Partnership workforce areas (the region), an update to the 2005 report. The 2005 report provided a snapshot of the varied strengths[1] and challenges[2] for the Pee Dee and Regional Partnership[3] workforce areas, its workforce, and its economy. It also outlined important issues and framed key opportunities for action designed to answer questions about the region's workforce preparedness in the global economy, which depended then and now more on knowledge skills than brawn and physical effort.

The 2005 report also gave citizens and stakeholders a look at both the opportunities and challenges the region would have to respond to if it were to position itself for global competitiveness. Out of that report came the focus for creating a **"COMPETITIVE WORKFORCE ADVANTAGE"** as a critical and defining core strategy if the region were to achieve its economic vision of prosperity.

The economy and labor market have struggled during the past couple of years. Conditions have deteriorated from the time the 2005 report was written. This has happened throughout the nation as well.

The 2005 report was done during a period of economic expansion. The data covered a period in the early to mid part of the decade when the nation and North Carolina was coming out of a recession and everything looked up. The 2010 report includes data during a period when we are in the worst economic period since the mid-thirties and the view is now much different.

We now find that the national and global economies are having more influence on the region than we saw in 2005: more companies are closing their doors, production plants are downsizing, and many communities are feeling the brunt of unemployment as they strain to deliver services and provide a safety net to workers and families.

While we look back to 2005 to look ahead, who would have thought that this region would find itself with so many changes that affect the workforce and the economy in such a profound? Especially in the last 2 years. Unemployment rates

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[1] Strengths are leverage points that can be built upon to improve a region's relative and absolute position in the national economy, leading to a better quality of living and employment for people and businesses in the Region.

[2] Challenges are the conditions that, if changed, will have the greatest impact on the quality of living and employment.

[3] Workforce Area Definitions:
Pee Dee Region: Montgomery, Moore, and Richmond Counties
Regional Partnership: Alamance, Orange, and Randolph Counties

are in double digits with no near prospect of coming back to pre-recession levels. This demonstrates how the region is influenced more by what is not in its control than what is.

There is no doubt the creation of a competitive workforce advantage through aggressive education and training is key to how well the region responds to the current economic downturn and how the region recovers. Many might say there are no jobs for the skills for which we are training. But many would say that the best way to ready for the post-recession period is to be prepared; prepared for the opportunities when they do emerge because “success favors the prepared mind”[4].

This will ensure these changes equip the region with the resources, assets, energy, and leadership to compete globally.

Report Input

The secondary (demographic) information was gathered between May 2009 and October 2009 by the Corporation for a Skilled Workforce (CSW) and Ed Simon Consulting. Recognizing that the workforce will be a key element in the regions’ future economic well being, this report’s data examines current and projected regional labor force, economic and business patterns.

While a number of the demographic data sets have been updated, the most valuable input to this report has come from the in-person interviews that were conducted from October through November 2009. The majority of interviewees were stakeholders who provided input to the 2005 report. By going back to this base of knowledge and experience, it allowed us to look back to look ahead. Thus much of this report’s conclusions and points of view represent a thematic synthesis of those interviews and allows the reader to see the larger picture of where the region is heading and what will play a major role in its economic recovery.

Acknowledgements

Preparation of this report was a collaborative effort between the Pee Dee and Regional Partnership Workforce Development Boards (WDB). Logistics support provided by the boards’ staffs was exceptional and the tasks of gathering data and conducting face-to-face interviews would have proven impossible without that help. A special thanks to Linda Parker, Workforce Development Director Pee Dee and Regional Partnership Workforce Development Boards, for arranging the stakeholder interviews. Additional data was collected through

[4] National Technical Honor Society (NTHS) Motto

research conducted by Ed Simon of Ed Simon Consulting and is presented throughout the report and its appendix.

The Corporation for a Skilled Workforce (CSW), an Ann Arbor, Michigan based workforce development research and consulting organization, completed research, interviews and wrote this report. CSW's team consisted of Project Manager, John P. Metcalf, and Rhonda Hoagland who helped organize the research and provided editing and formatting of the report.

Funding for this report was provided by the individual boards.

Additional copies of this report are available from the individual boards.

Purpose of the Report

The purpose of this document is to highlight changes from the earlier report completed in 2005 and the 2010 current update. The data in the 2005 report had statistics ranging from 2000 (Census data) to 2003 and 2004 for most of the data series. This report will compare our most recent data and go back about 4 to 5 years.

Report Goal

As in 2005, the overarching goal of the 2010 report is to share data with business, economic development, government, labor, education and other community leaders that demonstrate a serious commitment to workforce development is essential to the region's economic vitality. High quality human resources have always been an important component in a region's economic success. And, in this fast-changing, technology-driven economy, workforce issues must be an integral part of the debate about how to position the region for sustainable economic growth through a competitive workforce advantage. Regional economic development cannot succeed without a strong emphasis on and strategic investment in workforce development.

The hope is that this report will help further the development of the region's economy and thus create new jobs through highly skilled, knowledgeable workers and highly successful employers. By working together to promote the strengths of the region and to achieve workforce excellence, stakeholders can make this region the best it can be.

The Region's Personality

An important question asked of the report's interviewees was to describe the personality of the region. The following were the one-word descriptors that express the common views from across the region:

- Opportunistic
- Traditional
- Community
- Friendly/Caring
- Supporting
- Concerned

These adjectives give an insight to perceptions and at times reality of the situation and the underlying culture and traditions of the regions.

Looking Back to Look Ahead: A Summary of What Has Changed Since 2005

What we found in 2005 was that:

- National and global forces influenced local and regional economies;
- Both Pee Dee and Regional Partnership areas could capitalize on positive industrial and occupational trends to create and maintain a competitive workforce advantage;
- Both workforce areas were experiencing a large wave of outbound commuting by residents;
- Both workforce areas have an excellent post-secondary education system;
- The K-12 education system needed to continue its improvement in adequately preparing the regions' youth for the workforce; and
- The Pee Dee and Regional Partnership could address infrastructure challenges and transportation issues.

What we found today and how it contrasts to 2005:

Overall, national and global influences have much more control today than in 2005 over how the region and local economies respond to change. We are finding that due to the depth of the recession, the recovery mechanisms that were used in the past are no longer adequate to absorb the shock of national and global economic recessionary influences. This is shown in the lack of ability to return to pre-recession labor levels.

- The 2005 report was done during a period of economic expansion. The data covered a period in the early to mid part of the decade when both the nation and North Carolina were coming out of a recession. The 2010 report includes data during a time in which we are in the worst economic period since the mid-thirties.

- The labor market and economy for the counties in Pee Dee and Regional Partnership differ greatly, but overall the region has had higher unemployment rates than North Carolina did as a whole.

- North Carolina has one the highest unemployment rates in the nation (42nd), and the region is a little better. So not surprising, the unemployment rate is much worse now than previously in 2005.

Unemployment Rates

	Then	Now
North Carolina	5.5	10.8
Pee Dee/Regional Partnership	5.5	10.5
Pee Dee	6.6	11.8
Regional Partnership	5.1	10.1
Alamance	6.3	12.0
Montgomery	7.2	13.6
Moore	5.6	10.0
Orange	3.8	6.4
Randolph	5.1	11.7
Richmond	8.1	14.0

Source: U.S. Dept. of Labor, Bureau of Labor Stat.

- Income data – the region compares about the same as it did before. Certain counties like Orange still rank above the rest regarding income measurements. Richmond and Montgomery still rank low.

- Employment and labor force growth – much lower now.

- Industry job growth – much weaker now due to the recession.

- Demographics – Trends continue (much like before), an aging population, smaller % of young persons, more diverse population (growth of Hispanic pop.)and a large number of college age students (Orange County). Some areas represent a growing retirement community.

- Commuting Patterns – Most counties in the Region have extensive commuting patterns – this is similar to the earlier report.

- Occupational trends – Similar to earlier report – greatest opportunities are expected to be in the computer/IT fields, Healthcare and in education careers. Most new jobs will require more education and training.

POSITIVE TRENDS

Despite the very severe recession, there are some positives trends in the region:

- Commuting patterns are a positive – counties are able to attract skilled workers from neighboring counties. At the same time local residents are able to commute to job opportunities (from bedroom communities).
- Close proximity to affluent areas: Research Triangle, Durham County, Wake County and major universities.
- Major university (University of North Carolina) in the Region.
- Three counties are part of the BRAC Region – potential economic growth.
- Aging of the population is not all bad – Expansion of retirement communities; services to growing population will add jobs (i.e. Health Care, Transportation, Leisure and hospitality).
- Workforce Investment Areas and the Department of Labor have received increasing funds for job training and youth programs through the stimulus programs. This should help with retraining unemployed adults. Funding for youth programs would be geared towards trying to get students to stay in school and graduate.
- Stimulus package emphasizes "Green Jobs". This should help with displaced workers especially those who were in construction and manufacturing industries.

FROM THE STAKEHOLDER INTERVIEWS STARK REALIZATIONS EMERGE

From the interviews comes a stark realization that the region is in the grips of a recession that will have long lasting consequences on how the labor force will be utilized and how service delivery at all levels will be able to respond to wide spread community needs.

In summary, there are four things that become apparent for the short term and possibly the long term:

A New Norm

There is a "new norm" settling in the region – that what we see now in unemployment rates will become the norm versus an aberration. This means that high single digit and possibly double digit unemployment will last through the next decade without a major outside intervention causing a downward trend. Based on the region's lack of major assets and resources to form a core "demand generator" environment, the unemployment will remain high within the region. The new emphasis will be on the regions' residents to commute longer distances to meet household needs.

Lean is a Movement

If we thought "green" was a movement, lean is now the movement of choice for business at all levels. We found in the region what is playing out across the nation that businesses are cutting back on employment levels as they squeeze efficiency out of every level of process. This movement is not the sole domain of large business, but at every level of the employer sector we looked at – from large regional businesses to banking, to service delivery, to small businesses. The drive is to increase productivity with fewer and fewer employees. Businesses are now producing close to the level they were before the layoffs. In addition they are not planning on returning to the same pre-recessionary levels of employment and they will not be rehiring the same skill level they laid off. In fact, they will look for a new set of skills to ensure they have a long term impact. Most said that when "orders" return to pre-recession levels they will hire only a fraction of the number that was displaced. Production increases are created through quality driven efficiency methods and automation.

New Skills Imperative

Employers said over and over that they will be looking for new skill sets to replace those they had in pre-recession norms.

They are looking to hire people with:

- Team skills – team environments are the trend in both production and backroom jobs;
- Multi-tasking skills – need to have individuals who can fill more than one job role;

- High school plus education levels – employers are saying they need to fill positions for the future more than now; this means they are looking ahead to fit the new norm; and
- Global context – employees must have a sense of what the business does and how it fits into a global economic environment.

The Safety Net is "Thin and Frayed"

The safety net we provide to the most vulnerable is fraying and is in danger of breaking. If the economy deteriorates beyond its current level, many services residents depend on to make ends meet will dry up. Two forces are working to make the safety net thin: 1) continued unemployment at high levels and 2) overall gross household incomes are shrinking and voluntary contributions are down in concert with the incomes. Monetary and in-kind goods intake to institutions from faith-based to community-based organizations are down and there is an unprecedented strain on the unemployment system where our state coffers are being depleted faster than it can be re-filled.

What This Means for The Region

The old norm is no longer available to get the region back on its feet. It will take an unprecedented level of effort by the entire region's leadership to seek ways to get ahead of the new norm where high unemployment is prevalent and new skill levels are needed to satisfy new business norms.

It may mean looking towards two other areas that have assets and resources to create core demand generators to put people back to work.

Triad to the West

One is toward the Triad where a clean sheet of paper is being used to create job demands. This cache was created through the WIRED initiative where the focus has been placed on four cluster areas and related sectors to "ramp up" the demand:

> Clusters are regional—not defined by city, county or state boundaries. The Piedmont Triad Partnership is leading regional cluster initiatives in four key growth areas:

- Advanced Manufacturing
- Creative Enterprises and the Arts
- Health Care
- Logistics and Distribution

With the right training and educational upgrades, the residents in the region can find work in these cluster areas that have many occupational ladders to choose from. More in-depth information concerning these areas can be found at www.piedmonttriadnc.com

BRAC to the East

The other is toward Fayetteville where BRAC realignment is having a giant impact on new job sectors and employment opportunities. With the move of Ft. McPherson from Atlanta to Fayetteville, the BRAC region has a very large demand generator for new labor and talent.

Most new jobs created will support the "defense and homeland security cluster" associated with the BRAC initiative around Ft. Bragg. Opportunities will be focused on the following areas:

- Research and Development Services
- Navigational, measuring, electro-medical, & control Instruments MFG
- Motor & generator MFG
- Electronic & precision equipment repair & maintenance
- Management Consulting Services
- Computer Systems Design/Custom Computer Services

Again, with the right training and educational upgrades, the residents in the region can find work in these sectors supporting defense that have many occupational ladders to choose from. More in-depth information concerning these areas can be found at www.bracrtf.org

A Statistical View of the Region – Then and Now

One of the biggest changes during the recent past has been the sharp rise in unemployment. North Carolina has been especially hard hit and has one of the highest unemployment rates in the U.S. The following section compares the labor force series during the recent few years.

Unemployment and Labor Force Trends

- The unemployment rates for all areas in this report are much higher than they were in the 2005 report.
- The "Now" rates are year-to-date averages and may go higher.
- North Carolina has one of the highest unemployment rates in the nation.

- The highest unemployment rates are found in these counties: Richmond (14.0%) and Montgomery (13.6%).

- All areas had double-digit unemployment rates except for Orange County which was at 6.4%.

Unemployment Rates

	Then	Now
North Carolina	5.5	10.8
Pee Dee/Regional Partnership	5.5	10.5
Pee Dee	6.6	11.8
Regional Partnership	5.1	10.1
Alamance	6.3	12.0
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Richmond	8.1	14.0

Source: U.S. Dept. of Labor, Bureau of Labor Stat.

Labor Force and Employment

- The next two charts show the percent change in labor force and employment during the past four years.

- Labor force and employment (in this context) measures residential data. Employment is an estimate of employed persons who live in an area or region (regardless of where they work). Labor force is the sum of employment and unemployment (persons not working but actively seeking work).

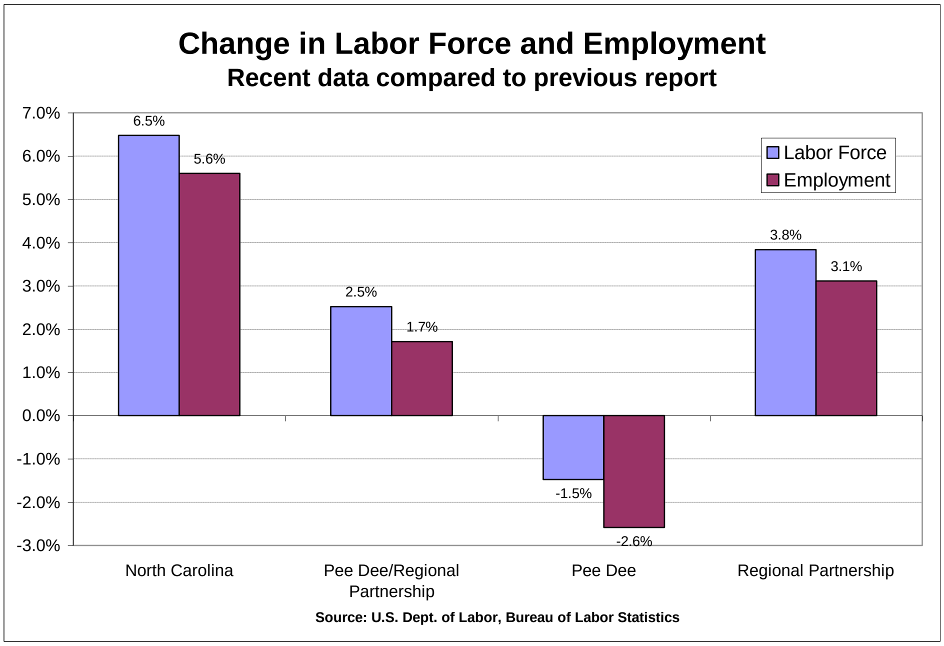
- It is very likely that during this year and next that employment will shrink in most areas.

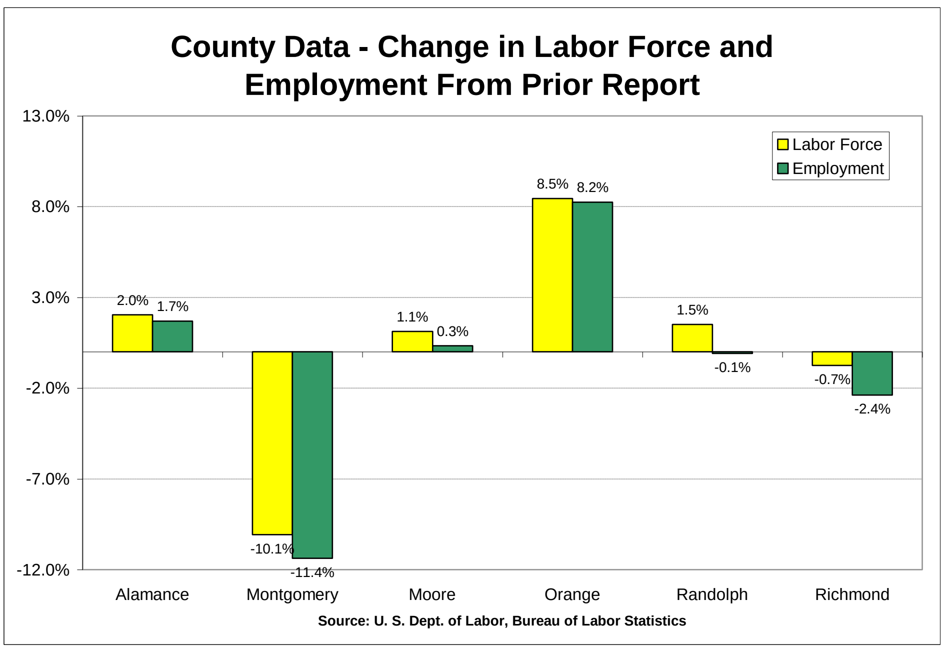
- All areas except for Orange County grew at a slower pace than the North Carolina average.

- The Regional Partnership had about half the rate of growth than did North Carolina.

- Pee Dee had a net decline during the period.

- The largest declines were in Montgomery and Richmond.





Population Trends

Population trends can be an indicator of the economic health of a region. Usually counties that have declining population totals are in the midst of a sharp economic decline. During recent years, 24 of North Carolina's counties have had double-digit population growth. Thirteen counties had a loss of population. None of the six counties in the Pee Dee/Regional Partnership were among the ones with the fastest growth. However, all six counties experienced some growth.

- During the "Then to Now" period, North Carolina had a population gain of 9.7%.
- Moore County had the highest increase in the region at 9.4%
- The increase for Pee Dee/Regional Partnership was 6.3%.
- Lowest gain in the Region: Richmond (1.5%) and Montgomery (1.4%).

Population Trends

			Change	
	Then	Now	Net	%
North Carolina	8,409,878	9,227,016	817,138	9.7%
Alamance	135,998	146,025	10,027	7.4%
Montgomery	27,264	27,656	392	1.4%
Moore	77,944	85,293	7,349	9.4%
Orange	120,283	129,319	9,036	7.5%
Randolph	134,407	141,002	6,595	4.9%
Richmond	46,171	46,853	682	1.5%
Pee Dee/Reg Part.	542,067	576,148	34,081	6.3%
Source: North Caolina State Demographics				

Dad it wouldn't let me change the chart. Carolina in North Carolina at the bottom needs an "r".

Educational Attainment

The State of the Workforce Report has extensive data on educational attainment for the region. There are comparisons at the county, state and national levels. In this section we'll take a look at recent trends in educational attainment for the region. We want to see if the region has had an increase in educational attainment.

- Pee Dee/Regional Partnership: Had positive overall trend with a percent decrease of persons with less than a H.S. education. There was a sizeable increase in persons with a bachelor's degree or above. The percentage of persons with a bachelor's degree or above rose by 13%, almost double the increase in total population.

Educational Attainment - Pee Dee/Regional Partnership		
	Then	Now
Less Than 9th Grade	7.2%	6.8%
9th Grade to 12th Grade	12.8%	12.7%
High School Diploma	29.7%	28.9%
Some College	18.9%	18.9%
Associate's Degree	6.8%	6.6%
Bachelor's Degree	14.7%	15.5%
Graduate Degree and Higher	9.9%	10.5%
Source: EMSI		

- Pee Dee: Also had positive overall trend. The percentage of persons with less than a H.S. education fell during the period. There was an increase in persons with a bachelor's degree or above. The percentage of persons with a bachelor's degree or above rose by over 13%, compared to an increase of 5% for total population.

Educational Attainment - Pee Dee		
	Then	Now
Less Than 9th Grade	7.7%	7.1%
9th Grade to 12th Grade	13.4%	13.2%
High School Diploma	30.8%	30.0%
Some College	20.4%	20.4%
Associate's Degree	7.6%	7.5%
Bachelor's Degree	13.2%	14.2%
Graduate Degree and Higher	7.0%	7.6%
Source: EMSI		

- Regional Partnership: Followed a similar pattern with the other areas. The trend to a larger percentage of college graduates is a very favorable one.

Educational Attainment - Regional Partnership		
	Then	Now
Less Than 9th Grade	7.0%	6.7%
9th Grade to 12th Grade	12.6%	12.6%
High School Diploma	29.2%	28.5%
Some College	18.2%	18.3%
Associate's Degree	6.5%	6.3%
Bachelor's Degree	15.3%	16.0%
Graduate Degree and Higher	11.1%	11.6%
Source: EMSI		

PER CAPITA INCOME

The purpose of this section is to look at another economic well-being measure. Per Capita income is a measure of the average income from all sources for total population (regardless of age). To compare a trend with the prior report, we looked at the most recent four years of data.

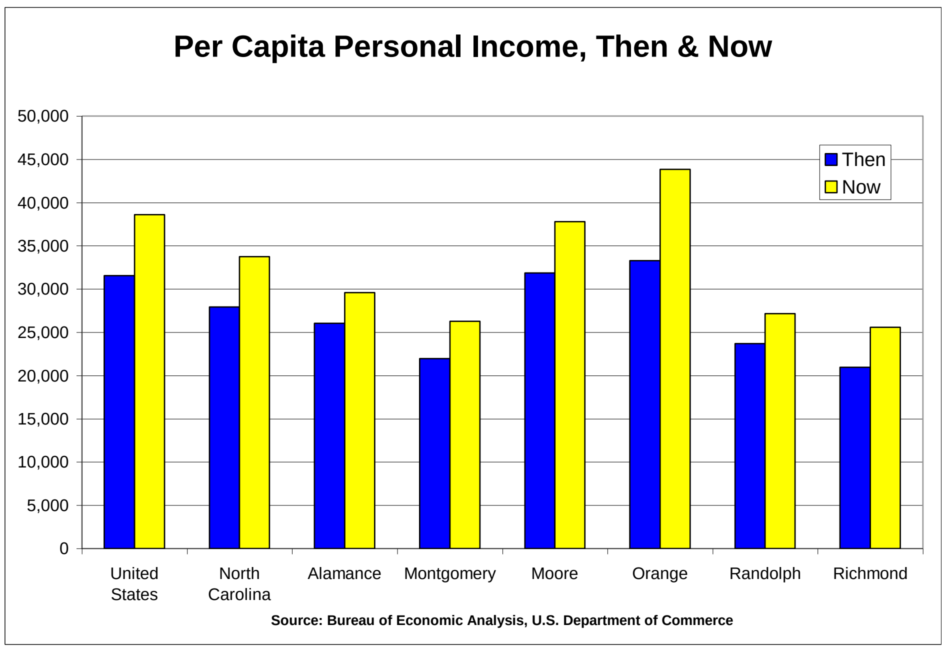
- The Per Capita income for North Carolina is much lower than the national average. During the period, North Carolina fell further behind – rising by 20.7% compared to 22.5% for the U.S.
- For the six counties in the Pee Dee/Regional Partnership, Orange and Moore are the highest and Montgomery and Richmond are the lowest.
- Only Orange grew at a faster pace than the U.S.

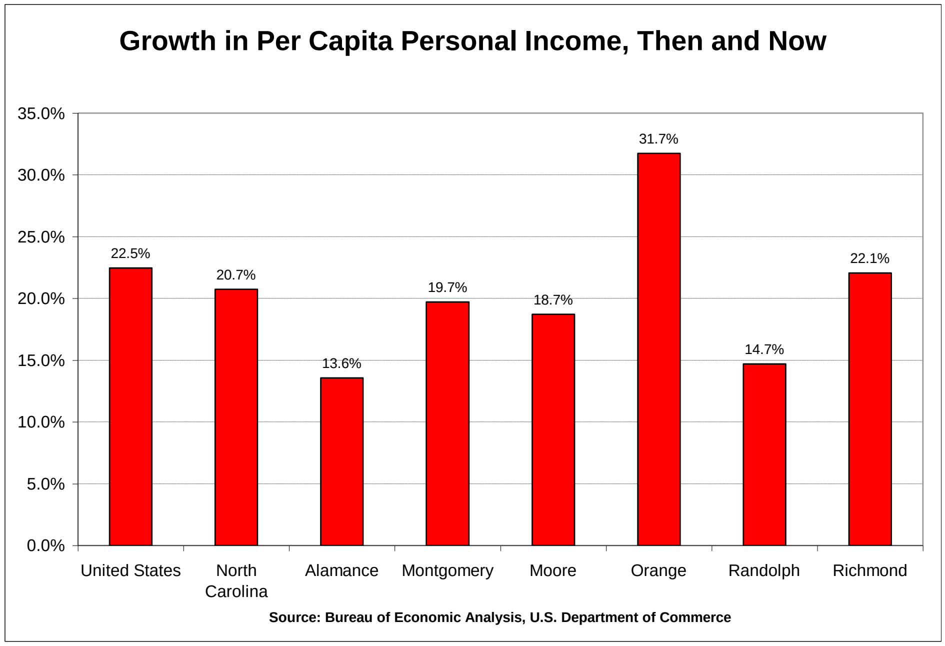
- Alamance grew at a pace of just 13.6%; Randolph grew at a rate of 14.7%

Per Capita Personal Income

	Then	Now	Net	%
United States	31,530	38,615	7,085	22.5%
North Carolina	27,942	33,735	5,793	20.7%
Alamance	26,040	29,575	3,535	13.6%
Montgomery	21,943	26,270	4,327	19.7%
Moore	31,841	37,800	5,959	18.7%
Orange	33,282	43,844	10,562	31.7%
Randolph	23,678	27,160	3,482	14.7%
Richmond	20,952	25,574	4,622	22.1%

Source: Bureau of Economic Analysis





INDUSTRY EMPLOYMENT

During the past few years, industry employment for Pee Dee/Regional Partnership rose by 6%. Rapid gains earlier in the decade have been somewhat tempered by the impact of the recession.

- Health and Social Services had a net gain of about 5,600 jobs, a gain of 22%.
- Government had a net gain of 3,200 – this was largely due to job increases in public education.
- Like other areas, manufacturing suffered heavy job losses.
- Other industries that had net losses were: Agriculture; Mining; Utilities; and Finance and Insurance.

Industry Trends by Major Sector - Pee Dee/Regional Partnership

NAICS Code	Description	Then	Now	Change	% Change
11	Agriculture, forestry, fishing and hunting	6,299	5,723	(576)	(9%)
21	Mining	630	501	(129)	(20%)
22	Utilities	713	663	(50)	(7%)
23	Construction	17,475	20,030	2,555	15%
31-33	Manufacturing	46,357	39,405	(6,952)	(15%)
42	Wholesale trade	7,032	7,438	406	6%
44-45	Retail trade	29,846	31,419	1,573	5%
48-49	Transportation and warehousing	5,693	5,701	8	0%
51	Information	2,510	2,803	293	12%
52	Finance and insurance	8,658	7,757	(901)	(10%)
53	Real estate and rental and leasing	7,392	9,531	2,139	29%
54	Professional and technical services	11,574	13,603	2,029	18%
55	Management of companies and enterprises	3,360	3,732	372	11%
56	Administrative and waste services	12,639	15,545	2,906	23%
61	Educational services	4,800	5,212	412	9%
62	Health care and social assistance	25,583	31,217	5,634	22%
71	Arts, entertainment, and recreation	5,257	5,672	415	8%
72	Accommodation and food services	18,665	21,136	2,471	13%
81	Other services, except public administration	13,194	14,453	1,259	10%
90	Government	54,734	57,977	3,243	6%
	Total All Industries	282,411	299,518	17,107	6%

Source: Economic Modeling Specialists, Inc., EMSI

The following table compares the growth rate of each major sector in the Region with that of all of North Carolina and the U.S. The time period ("Then and Now") covers the past few years through 2008.

Industry Growth Comparison (%)

NAICS Code	Description	Pee Dee/Regional Partnership	North Carolina	U.S.
11	Agriculture, forestry, fishing and hunting	(9%)	(10%)	(3%)
21	Mining	(20%)	(3%)	31%
22	Utilities	(7%)	(8%)	(2%)
23	Construction	15%	20%	13%
31-33	Manufacturing	(15%)	(13%)	(6%)
42	Wholesale trade	6%	13%	9%
44-45	Retail trade	5%	6%	3%
48-49	Transportation and warehousing	0%	6%	8%
51	Information	12%	(1%)	(3%)
52	Finance and insurance	(10%)	14%	5%
53	Real estate and rental and leasing	29%	41%	32%
54	Professional and technical services	18%	25%	15%
55	Management of companies and enterprises	11%	25%	17%
56	Administrative and waste services	23%	20%	11%
61	Educational services	9%	22%	17%
62	Health care and social assistance	22%	24%	13%
71	Arts, entertainment, and recreation	8%	21%	13%
72	Accommodation and food services	13%	19%	11%
81	Other services, except public administration	10%	11%	9%
90	Government	6%	8%	3%
	Total All Industries	6%	11.2%	7.8%

Source: EMSI

Occupational Employment

The following data represents occupational trends for Pee Dee/Regional Partnership. During the past few years, occupational employment for Pee Dee/Regional Partnership rose by 6%. The average wage for all occupations is $32,365. The first table is sorted by % change (job change) during the "Then and Now" period.

- Fifteen occupational groups grew at a faster pace than the 6% average for all occupations. This is favorable news since job growth was spread around many occupational groups. Many of the occupations in these groups require extensive education/training. Eight of these groups pay above the average wage.

- Five groups had a decline in the number of jobs. The largest decline (13%) was for production jobs. Only one of the declining occupational groups pays above the average wage in the region.

% Change - Major Occupational Groups, Pee Dee/Regional Partnership

Description	% Change	Avg. Annual Wage
Life, physical, and social science occupations	28%	$43,385
Healthcare support occupations	28%	$23,855
Community and social services occupations	24%	$33,806
Business and financial operations occupations	19%	$40,920
Computer and mathematical science occupations	16%	$49,217
Legal occupations	16%	$57,597
Healthcare practitioners and technical occupations	14%	$58,826
Building and grounds cleaning and maintenance occupations	14%	$18,402
Arts, design, entertainment, sports, and media occupations	13%	$27,938
Food preparation and serving related occupations	13%	$18,624
Personal care and service occupations	12%	$18,962
Construction and extraction occupations	12%	$29,373
Sales and related occupations	11%	$24,707
Management occupations	7%	$50,394
Architecture and engineering occupations	7%	$49,610
Office and administrative support occupations	4%	$26,775
Installation, maintenance, and repair occupations	3%	$31,342
Education, training, and library occupations	0%	$52,807
Farming, fishing, and forestry occupations	(1%)	$23,194
Protective service occupations	(3%)	$35,078
Military Occupations	(4%)	$24,652
Transportation and material moving occupations	(4%)	$26,297
Production occupations	(13%)	$24,278
Source: EMSI		

The next table also covers Pee Dee/Regional Partnership. The detailed occupation file is sorted by net job gains during the period. Wages and education levels are included.

- Please note that some of the occupations are paid on a commission basis (i.e. real estate brokers and real estate sales agents). Despite the growth in jobs in recent years, the slowdown in the economy has impacted sales activities and earnings for these occupations.

Detailed Occupational Data - Pee Dee/Regional Partnership

Description	Then	Now	Net Change	% Change	Avg. Annual Wage	Education Level
Home health aides	3,303	4,668	1,365	41%	$20,985	Short-term on-the-job training
Postsecondary teachers	3,845	4,812	967	25%	$90,240	Doctoral degree
Combined food preparation & serving workers, inc. fast food	5,017	5,903	886	18%	$16,301	Short-term on-the-job training
Real estate brokers	1,892	2,602	710	38%	$19,479	Work experience in a related field
Real estate sales agents	1,772	2,481	709	40%	$18,442	Postsecondary vocational award
Maids and housekeeping cleaners	3,664	4,305	641	17%	$15,471	Short-term on-the-job training
Registered nurses	4,450	5,051	601	14%	$55,240	Associate's degree
Waiters and waitresses	4,024	4,593	569	14%	$17,484	Short-term on-the-job training
Retail salespersons	7,145	7,659	514	7%	$21,222	Short-term on-the-job training
Accountants and auditors	1,969	2,459	490	25%	$39,816	Bachelor's degree
Executive secretaries and administrative assistants	3,352	3,816	464	14%	$31,624	Moderate-term on-the-job training
Personal and home care aides	818	1,264	446	55%	$17,312	Short-term on-the-job training
Property, real estate, and community association managers	1,057	1,455	398	38%	$19,104	Bachelor's degree
Carpenters	2,336	2,712	376	16%	$27,537	Long-term on-the-job training
Child care workers	2,056	2,413	357	17%	$15,497	Short-term on-the-job training
Cashiers, except gaming	5,900	6,243	343	6%	$16,890	Short-term on-the-job training
Construction laborers	1,929	2,261	332	17%	$24,834	Moderate-term on-the-job training
Building cleaning workers, all other	773	1,087	314	41%	$14,081	Short-term on-the-job training
Office clerks, general	4,063	4,354	291	7%	$23,505	Short-term on-the-job training
Bookkeeping, accounting, and auditing clerks	3,389	3,669	280	8%	$26,404	Moderate-term on-the-job training
Construction managers	1,279	1,558	279	22%	$42,300	Bachelor's degree
First-line supervisors/managers of construction trades	2,071	2,349	278	13%	$39,727	Work experience in a related field
Social and human service assistants	706	979	273	39%	$28,351	Moderate-term on-the-job training
Management analysts	1,159	1,428	269	23%	$42,396	Degree plus work experience
First-line supervisors/managers of retail sales workers	4,400	4,662	262	6%	$30,181	Work experience in a related field
Source: EMSI						

WHAT NEXT

With every new challenge the region faces there has always been a wave of leadership to step forward to ensure the future is set to a vision that incorporates the ideals and values of its' residents. Now is no different for the Pee Dee and Regional Workforce Development Boards and its stakeholders. Bold leadership will have to prevail for the region to overcome daunting obstacles.

One way to help in the transition is to think in terms of regional collaboration. Not the collaboration that is niche, but collaboration that has a larger vision on how to leverage resources and assets across county and municipal boundaries to the benefit of all.

"Businesses and governments in other regions are organizing effectively to compete—if you don't cooperate your region will fall behind. In short, regions must learn to collaborate to compete globally." Doug Henton, "Power of Regionalism" speech, 2008

The operative word is "collaborate". There are many models that can move people along to collaborate and partner to get the job done.

Following is one that CSW offers to the region to study and to reference as the leadership begins to ponder its new direction and the gathering of resources and assets to make the Pee Dee and Regional Partnership one to model for several generations.

Architecture of Collaboration

Effective collaboration rarely just happens – it needs to be thoughtfully and carefully cultivated (and iterated). The following interconnected dimensions of collaboration are offered for consideration by community leaders advancing regional change efforts.

GOAL SETTING. Collaboration begins with a shared interest or commitment to a common goal. It is typically catalyzed by an individual or small groups "rallying the troops" in an effort to try a new approach to a compelling community problem. The goal can be relatively narrow, for example, increasing the number of students graduating from high school; or broader, but still confined to a single interest area, as many of the planning efforts associated with federal transportation legislation have been; or very broad, like WIRED and BRAC efforts that typically identify "regional economic and workforce transformation" as among their objectives. It is the breadth and scope of this goal that should inform the composition of the stakeholder collaborative and the sophistication of the structures that support it.

THEORY OF CHANGE. Collaboratives must develop a shared understanding of their theory of change – the logic and principles guiding group action. This drives the group's strategy and sets the foundation for a host of subsequent decisions.

ROLE OF OUTSIDE CATALYSTS/ENABLERS. While the initial advocates for collaboration typically come from inside a region or field of interest, external catalysts can be essential for both accelerating progress and sustaining efforts.

Federal laws and national, state and foundation grants can be excellent catalysts because they create specific deadlines, plans and frameworks, and resources that lend structure to stakeholder efforts. Moreover, they often call for outcome reports, and include evaluations that help stakeholders learn from their ongoing activities, improving their impact over time. However, outside catalysts can also inhibit the organic character of a collaborative effort, leading to tension between the intent of the catalyst (e.g., funder) and the intent of the stakeholders participating in the collaborative.

SCOPE, SCALE, TYPE OF INTERVENTIONS. Determining the number, scope and scale of interventions designed to achieve the goal will inform both the membership and the structure of collaborative efforts. There are a myriad of design choices about the scope and scale of interventions. The collaboratives' strategic intent, theory of change and overall capacity are useful guides in decision-making.

STAKEHOLDER EXPECTATIONS FOR PARTICIPATION. Early in collaborative efforts, stakeholders typically establish ground rules – either formal or informal – about the number of members, their roles, and what the expectations are for participation. One issue that requires careful consideration is representation: when stakeholders participate, are they doing so as individuals or as representatives of firms, industries, programs or institutions? To what degree can they commit time and resources? The rules for all stakeholders need not be the same (different stakeholders could play different roles), but they should be *clear* to members of the collaborative.

LEADERSHIP, STRUCTURE, AND DECISION-MAKING PROTOCOLS. Collaborative efforts nearly always require some kind of leadership structure – a leadership, advisory or governing board, for example. The board might or might not be incorporated as a legal entity. It might be staffed by a member, a consultant, an individual who works for one of the member organizations or a team of people who work for the members. It might serve as its own fiscal agent or use the fiscal support of a member.

The structure of a collaborative typically informs its leadership and decision-making protocols – are there officers? How are they selected? How are decisions made among the group? Who bears liability for the effects of those decisions? It also informs choices about how work gets done –through committees or work groups, centralized staff or by the stakeholders and their organizations. There are many options but leaders should be consistent and clear about which ones they employ.

COMMUNICATIONS AND COLLABORATIVE INFRASTRUCTURE. Whether a collaborative is (or aspires to be) a legal entity or not, its communications and collaborative infrastructure are central to its effectiveness. While there are many simple and affordable tools that support communications and collaboration – from listservs to wikis to Google docs – the responsibility for managing these tools and the communication and collaboration they facilitate should be not be taken lightly.

Tools that enable communications and collaborative working are the glue that holds collaborative groups together.

ACCOUNTABILITY. When collaborative efforts begin, they are typically over and above the "day jobs" of members. Demonstrating progress against shared goals is important because it keeps collaborators at the table long enough to discover the benefits of collaboration, and begin to approach their "days jobs" differently.

Collaboratives need meaningful and appropriate measures, milestones, outcomes or other ways to demonstrate impact in different time horizons (short, medium and long term) and across member jurisdictions or agencies.

BROADER PUBLIC ENGAGEMENT. When collaborative efforts begin, their attention is focused inward – on members, on the agenda, on structures and resources and so on. But as they mature, broader engagement strategies are needed. For example, a collaborative working on economic transformation might select a small number of industries to invest in. As a result, stakeholders from these industries – and the associations, interest groups, training providers and others that support them – may need to be engaged. In many cases, public engagement, through information or education campaigns, is an explicit focus of collaborative efforts. This is some of the most important work collaborative groups can do. Done well, public engagement strategies can geometrically increase impact as individuals outside the group begin thinking, feeling and behaving in ways that support the group's objectives. Recycling campaigns, for example, dramatically increased recycling rates and investments in the infrastructure that make recycling possible.

Among the key benefits of effective collaborative partnerships are:

SHARED INTELLIGENCE. One of the first deliverables collaborative groups typically invest in is data – quantitative or qualitative, in the form of an asset map, survey or an aggregation of their collective knowledge about the issues they are working on, or an externally commissioned report. This does three important things. First, it creates a common base of knowledge that can serve as a starting point for the development of a shared strategy.

Second, if disseminated, it can help the group "stake a public claim" on the issues they have committed to working on, which serves as a signal to others who care about the same issues.

Third, if disseminated, if can inform the actions of others who might not be connected to the group itself, but may have the ability to impact the group's goals.

EFFICIENCY. Early collaborative efforts involving multiple meetings tend not to feel very efficient. However, as groups coalesce, they begin to invest time and resources collectively. This can reduce the cost burden on individual members and make it possible for those who were not investing before to participate in a meaningful way. Regional collaboration in WIRED, for example, is characterized by collective investments in curriculum development and training that is shared across multiple institutions, reducing the cost to everyone.

HEALTHY SOCIAL NETWORKS. While we are just now beginning to quantify the impact of social networks on the economic and social health of communities, research shows that they have a profound impact on capacity of communities to reinvent themselves.

Collaborative efforts tend to increase the depth and quality of social networks, which themselves become a key asset, both because they can accelerate progress on collaborative work, and because they enable the kind of serendipitous connecting of people and resources that leads to innovation.

ABILITY TO IMPACT PROBLEMS THAT MATTER. Poverty, literacy, education attainment, in-migrant populations, industry transition, innovation, regional resilience – these are complex and multifaceted (wicked) problems and issues. They are also among the most important challenges we face. The idea of making a difference in these areas can inspire and motivate the most cynical.

CONFIDENCE. Successful collaboration can lead to more successful collaboration on a greater range of issues. This kind of virtuous spiral can lead existing collaboratives to take on new issues, and incent new partnerships that lead to innovative, entrepreneurial ideas and solutions to community needs. It can even begin to define the culture of a region.

APPENDIX

This section of the report outlines the supply and demand assessment of the critical factors that will drive the economy of the region for the next 15-20 years. It begins to answer the "who we are, and what we do." The supply and demand indicators provide a glimpse into the region's existing dynamics and the trends that will carry the region forward. This section outlines regional trends and provides insight to the region's storylines through those trends. Our goal in this section is to describe regional challenges and corresponding strategies for completing a successful economic transformation.

Our data and analysis are based on both past trends and assumptions about anticipated future developments, assuming no changes in policy or economic conditions. However, we know for sure that the population will be impacted dramatically as an outside force that will have a profound impact on the region's demographics, including diversity, housing, transportation and the educational delivery systems. As the same authors of this report stated in the 2007 North Carolina State of the Workforce Report *"THESE FORECASTS AND TRENDS SHOULD BE USED IN THE SPIRIT IN WHICH THEY ARE PROVIDED, AS A TOOL FOR ASSESSING LIKELY FUTURE PATTERNS IN THE EVENT THAT NO POLICY ACTION TAKES PLACE TO CHANGE THAT FUTURE AND THERE ARE NO MAJOR UNFORESEEN ECONOMIC UPHEAVALS.* In addition, other analyses may differ slightly in their outlook for certain industries or occupations. These differences come from using different projection tools and models. However, the core predictions hold true across methodologies and represent an accurate picture of the future, assuming current trends do not change."

REGIONAL CONTEXT

POPULATION

CHART 1: DISTRIBUTION OF POPULATION BY COUNTY, 2008

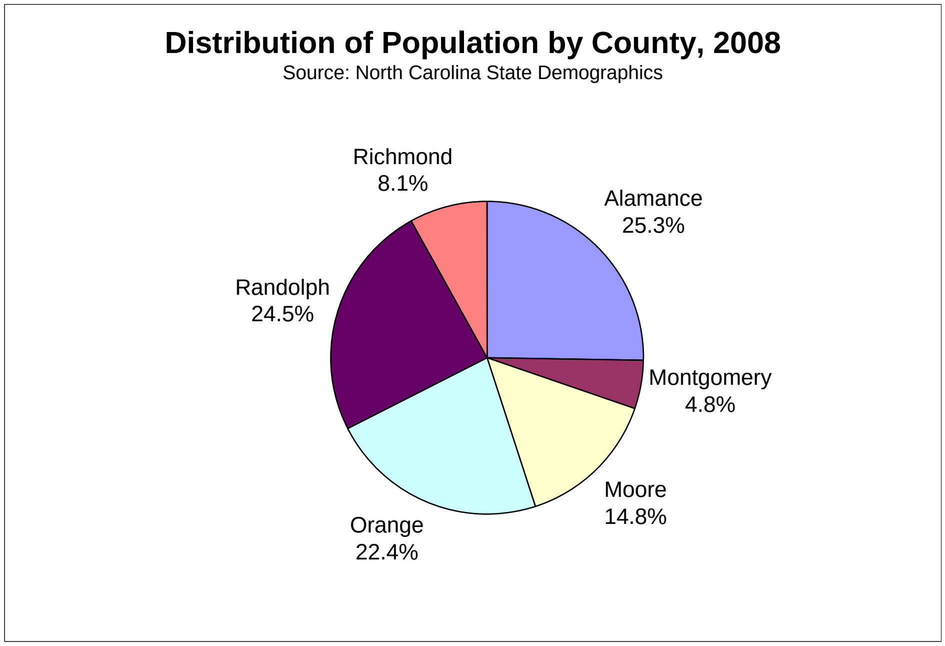


TABLE 1: DETAILED POPULATION GROWTH DATA

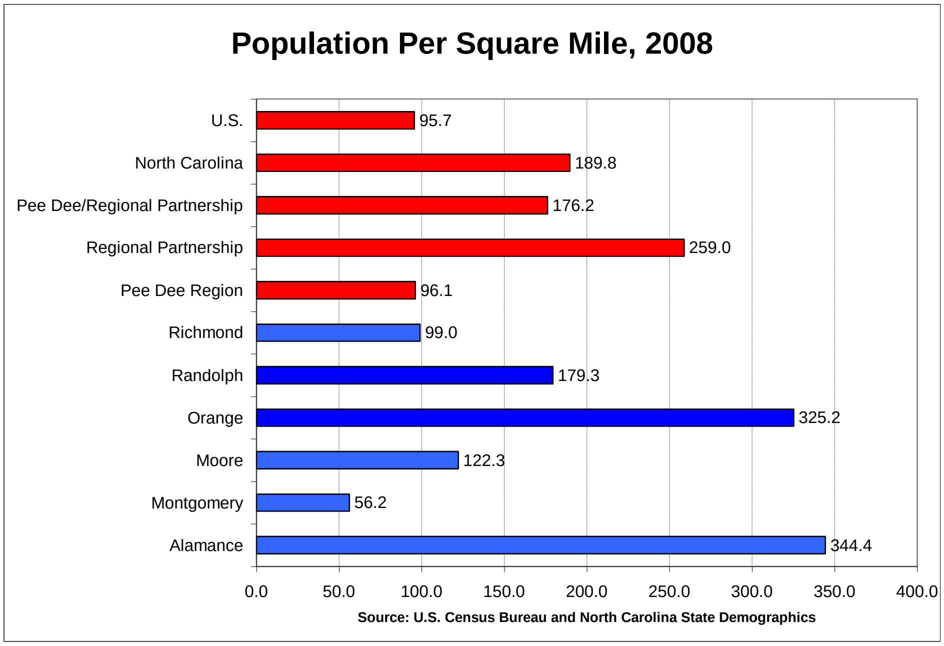
	Population	% of State
Alamance	146,025	1.6
Montgomery	27,656	0.3
Moore	85,293	0.9
Orange	129,319	1.4
Randolph	141,002	1.5
Richmond	46,853	0.5
Pee Dee Region	**159,802**	**1.7**
Regional Partnership	**416,346**	**4.5**
Pee Dee/Regional Partnership	**576,148**	**6.2**
North Carolina	**9,227,016**	**100.0**

Source: North Carolina State Demographics

- Total population (2008) for the six county Pee Dee/Regional Partnership areas was 576,148. This represented about 6.2% of total statewide population. The Regional Partnership section is much larger than the Pee Dee component.
- Alamance is the largest county while Montgomery has the smallest population.

- The three counties of Alamance, Randolph and Orange account for over 70% of the combined region's population.

CHART 2: POPULATION DENSITY



- North Carolina has a much higher population density (population per square miles) than the U.S. (189.8 vs. 95.7).
- The Pee Dee Region (96.1) has a less dense population than North Carolina.
- The Regional Partnership has relatively high dense population at 259.0.
- By far, Alamance (344.4) and Orange (325.2) have the highest density in the region.
- Randolph is third with a density of 179.3, just below the statewide average.
- The counties in the region with the lowest density were: Montgomery (56.2); Richmond (99.0); and Moore (122.3).

COMMUTING PATTERNS

Labor market areas are not self-contained. Generally there is substantial movement of workers across county and regional boundaries. It is important to show how the region is built around commuting patterns. This information can help planners access labor supply, transportation, education, training and infrastructure needs.

- Within the region, there is a wide variation in the percentage of residents working in their home county – Moore was the highest at 64.4% followed by Montgomery at 55.0%.
- At the other end of the scale were Orange (42.5%) and Randolph (47.1%).
- Counties with large negative net commuting include: Randolph (-10,504); Alamance (-6,549); and Richmond (-3,305).
- Counties with positive net commuting include: Moore (+4,882); Orange (+4,593); and Montgomery (+1,689).

CHART 3: PERCENT WORKING LOCALLY

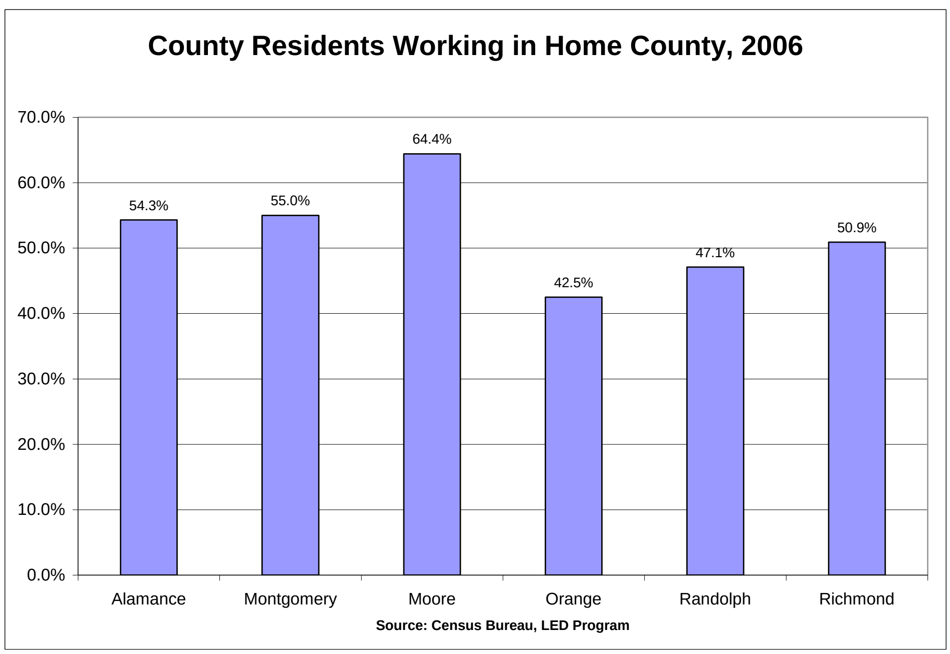
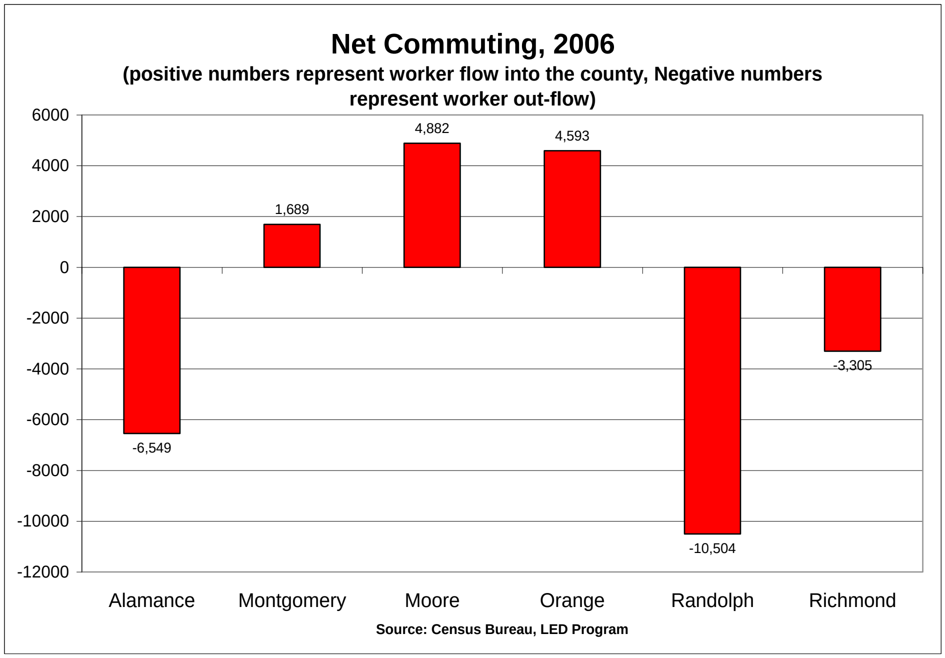


Chart 4: Net Commuting



Workforce Supply Assessment

Population, Age, & Race

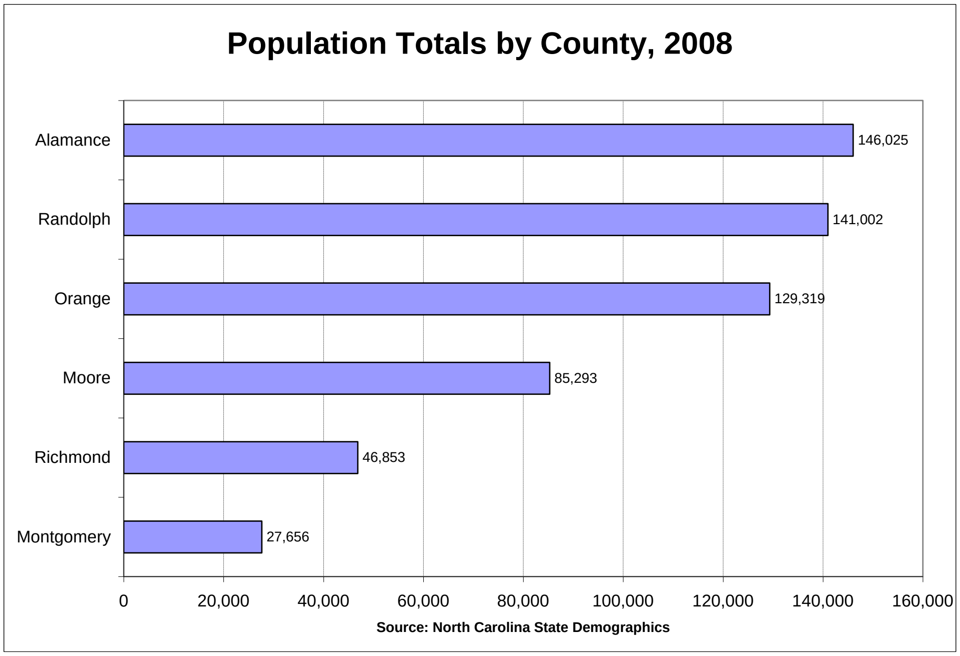
Population is a very basic workforce indicator since the region's workforce is generally drawn from the local residents. In this section, the data summarized helps planners determine the current and potential size of the labor pool, the racial makeup of the labor force that could drive changes needed in the workplace and identify the possible need to target specific age cohorts to strengthen the labor supply. It also describes the educational and social aspects of the region.

Population Summary

- In 2008, total population for Pee Dee/Regional Partnership was 576,148 up by 51,192 from 2000 for a rise of 9.8%.
- The Regional Partnership grew by 10.5%, while Pee Dee grew at a rate of 7.9%
- During the same period population growth was much faster for North Carolina at 14.7%. The U.S. grew at a rate of 7.8%.

- Alamance, the largest county in the region grew at a rate of 11.6% during the 2000 to 2008 span. Orange County also grew at a rate of 11.9%.
- The region's fastest growing county was Moore at 25.4%.
- The slowest growing counties were: Randolph (8.1%); Montgomery (11.6%); and Richmond, at just 0.3%.

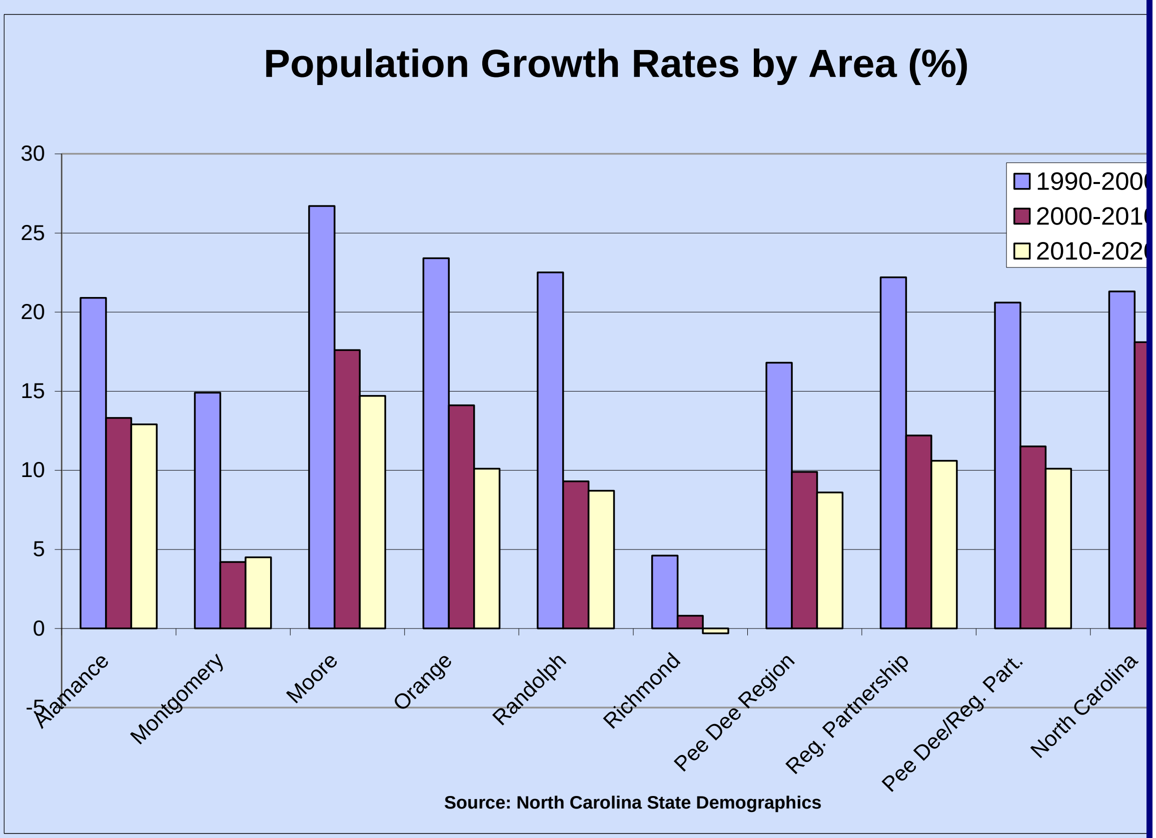
Chart 5: County Population Totals



Population Growth: What Does It Mean for the Region?

Population growth is particularly important to sustaining a vital economy. The region must provide a workforce that can support growth in current and future industries. The region is growing at a slower pace than the state and nation, but population growth rates vary across the region. A potential challenge is supplying an ample labor force in the counties with slow population growth. A potential asset is the relatively high growth in Alamance and Orange which may support counties that are lagging in population growth. Growth strategies can be developed to manage the stresses that come with high growth as well as those that come with slow population growth communities. Managing community growth is a balance between supporting current living standards and quality of life with the interest to secure a healthy social and economic region. The following chart compares historic and projected population change for the State, Region and Counties.

Chart 6: Population Trends



- 1990 to 2000: North Carolina grew at a rapid rate of 21.3%. The Pee Dee/Regional Partnership region grew slightly slower at 20.6%. Growth rates for the individual counties were: Alamance (20.9%); Montgomery (14.9%); Moore (26.7%); Orange (23.4%); Randolph (22.5%); and Richmond (4.6%).

- 2000 to 2010: Population growth is expected to slow somewhat for areas (North Carolina at18.1% and Pee Dee/Regional Partnership at11.5%). The growth for Pee Dee is expected to be 9.9% and 12.2% for the Regional Partnership. Growths for the six counties are: Alamance (13.3%); Montgomery (4.2%); Moore (17.6%); Orange (14.1%); Randolph (9.3%); and Richmond (0.8%).

- 2010 to 2020: Projected population growth for North Carolina expected to slow to 15.4%; Pee Dee/Regional Partnership (10.1%); Pee Dee (8.6%); and the Regional Partnership (10.6%). The projected growth rates by county are: Alamance (12.9%); Montgomery (4.5%); Moore (14.7%); Orange (10.1%); Randolph (8.7%); and a decline for Richmond (-0.3%).

- During the entire period the counties with the least growth are Montgomery and Richmond.

Age Summary

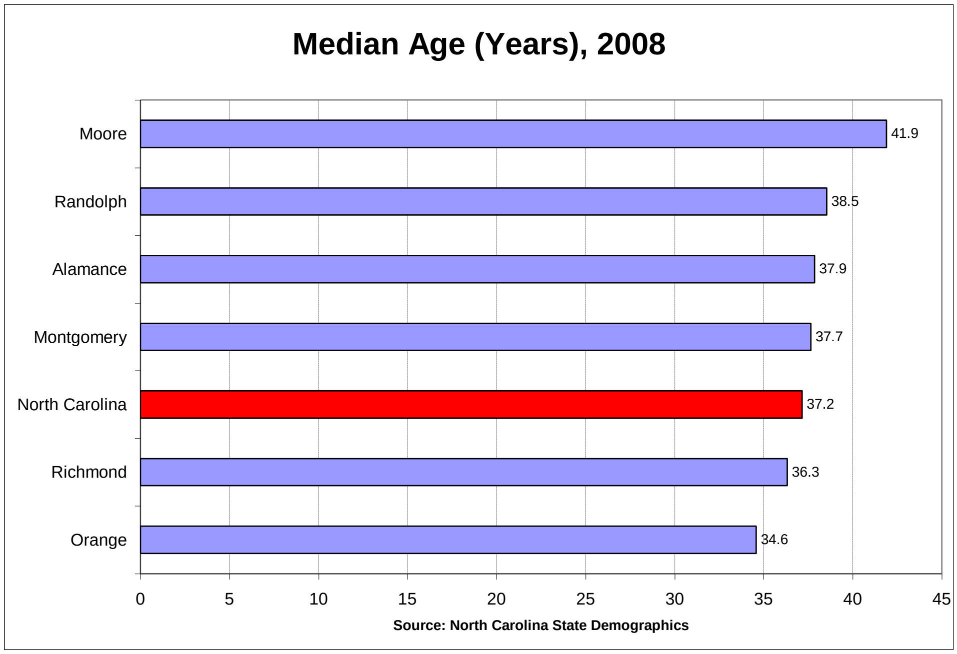
Age of the population is a key workforce indicator both in terms of labor supply and the increased need for services (i.e. Health Care). An older population may indicate the need for more recruitment to secure younger workers. The age of the population can determine what types of occupations will growth the fastest in an area.

- The median age in 2008 for North Carolina was 37.2 years. Four Counties in the Pee Dee/Regional Partnership had a higher median age that the State, while two had a lower median age.

- By far Moore has the oldest population with a median age of 41.9 years. Richmond has a relatively young population with a median age of 36.3. The youngest was Orange County at 34.6 years.

- The primary reason for the relatively younger population in Orange is a large base of college age persons.

CHART 7: MEDIAN AGE - REGIONAL COUNTIES AND NORTH CAROLINA '08



- The following charts compare the population age distribution for North Carolina, Region and individual counties. The age distribution differs considerably by county. Table 2 shows the details by age group.
- 0 to 14 years – U.S. was at 20.1%; North Carolina (19.8%); and Pee Dee Regional Partnership (18.3%). Counties with above average percentages were Montgomery (20.6%) and Richmond (20.5%).
- 15 to 24 years – U.S. was at 14.0%; North Carolina (14.7%); and Pee Dee Regional Partnership (16.1%). By far Orange County was the highest at 23.0%.
- 25 to 34 years – U.S. was at 13.5%; North Carolina (12.5%); and Pee Dee Regional Partnership (11.8%). Only Montgomery (12.6%) was above the statewide rate.
- 35 to 44 years - U.S. was at 14.0%; North Carolina (14.7%); and Pee Dee Regional Partnership (14.1%). Only Randolph (15.0%) was above the statewide rate.

- 45 to 54 years - U.S. was at 14.6%; North Carolina (14.6%); and Pee Dee Regional Partnership (14.3%). Randolph was at 15.0%and Alamance tied the statewide rate of 14.6%.
- 55 to 64 years - U.S. was at 11.1%; North Carolina (11.3%); and Pee Dee Regional Partnership (11.5%). Randolph was the highest at 12.0%.
- 65 years and above - U.S. was at 12.8%; North Carolina (12.4%); and Pee Dee Regional Partnership (13.7%). Moore was the highest at 20.4%. Only Orange at 9.7% had a lower percentage of persons 65+ than North Carolina.
- Overall the Pee Dee/Regional Partnership has smaller percentage of younger persons compared to the State (with exception of the 15 to 24 age group). But on average, the Region has a larger percentage of older individuals.

CHART 8: AGE DISTRIBUTION

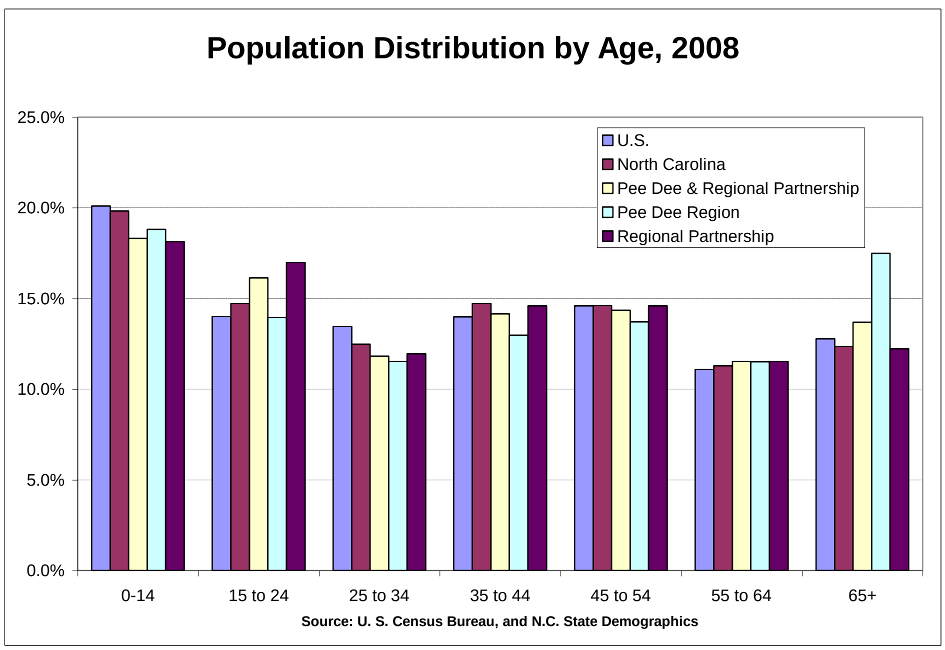


CHART 9: AGE DISTRIBUTION PEE DEE REGION, '08

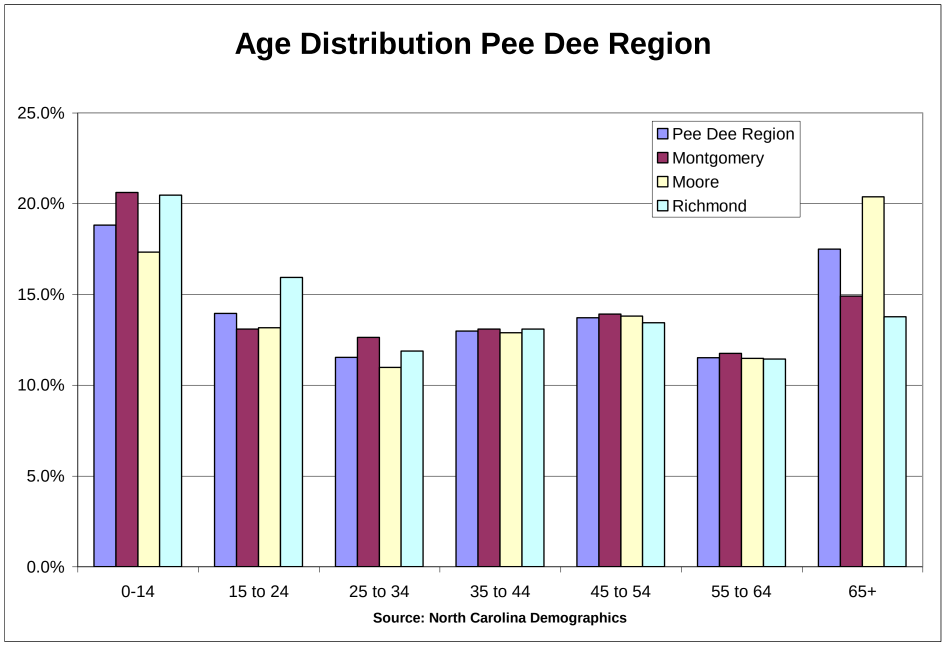
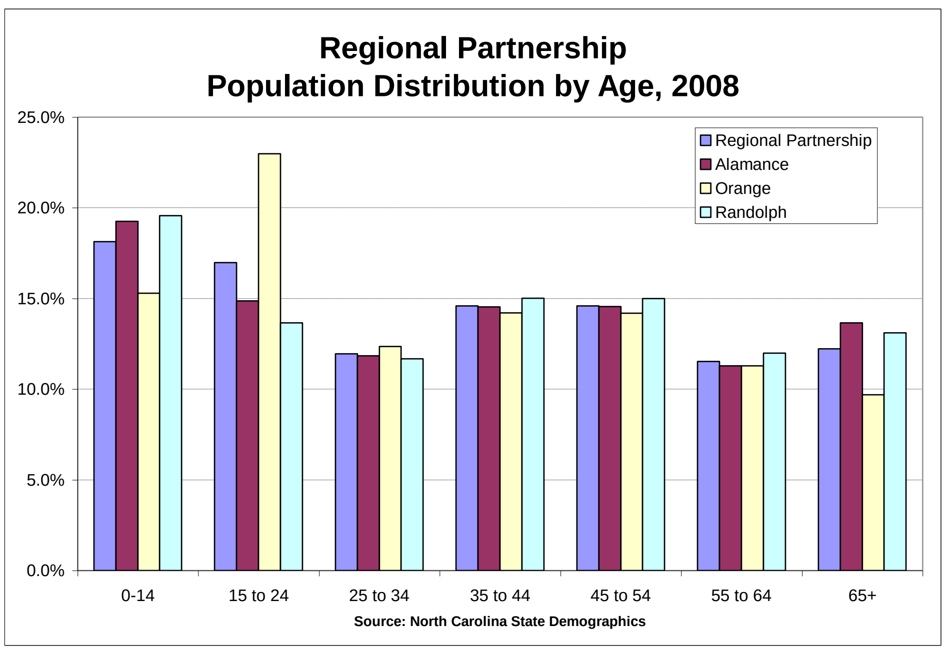
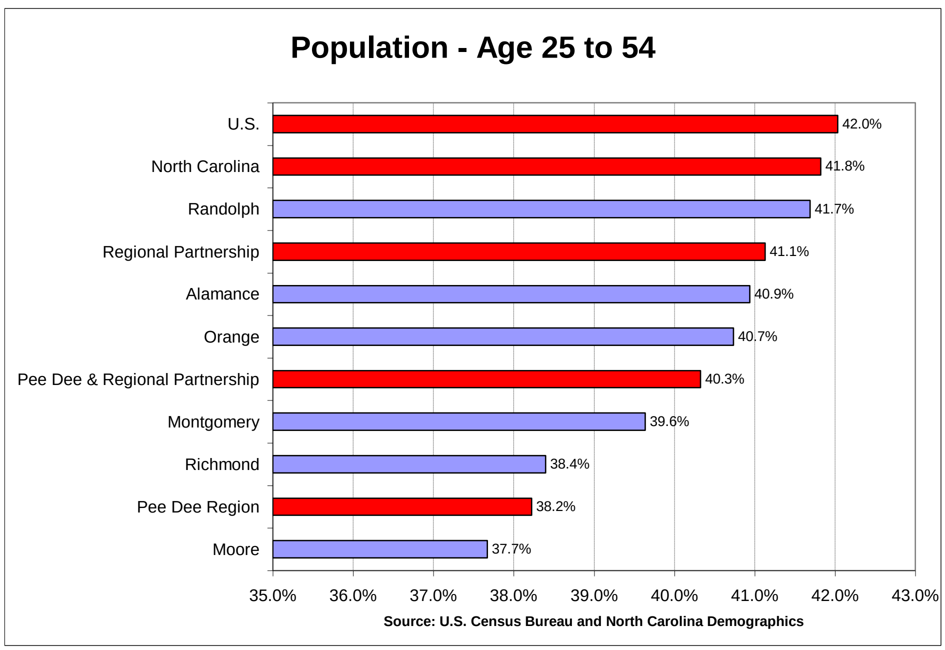


CHART 10: AGE DISTRIBUTION REGIONAL PARTNERSHIP, '08



- A key to economic development is the supply of workers. One of the ways to measure this is to take a look at the percent of the population age 25 to 54 years. This is the primary core of an area's workforce.
- The Pee Dee/Regional Partnership has a smaller percentage (40.3%) in this group compared to North Carolina (41.8%) and the U.S. (42.0%).
- For specific areas: Pee Dee is at only 38.2%; Regional Partnership at 41.1%.
- At the county level, the percentages in the 25 to 54 years of age category are as follows: Randolph (41.7%); Alamance (40.9%); Orange (40.7%); Montgomery (39.6%); Richmond (38.4%); and Moore (37.7%).

CHART 11: PERCENT OF POPULATION, AGE 25 TO 54, 2008

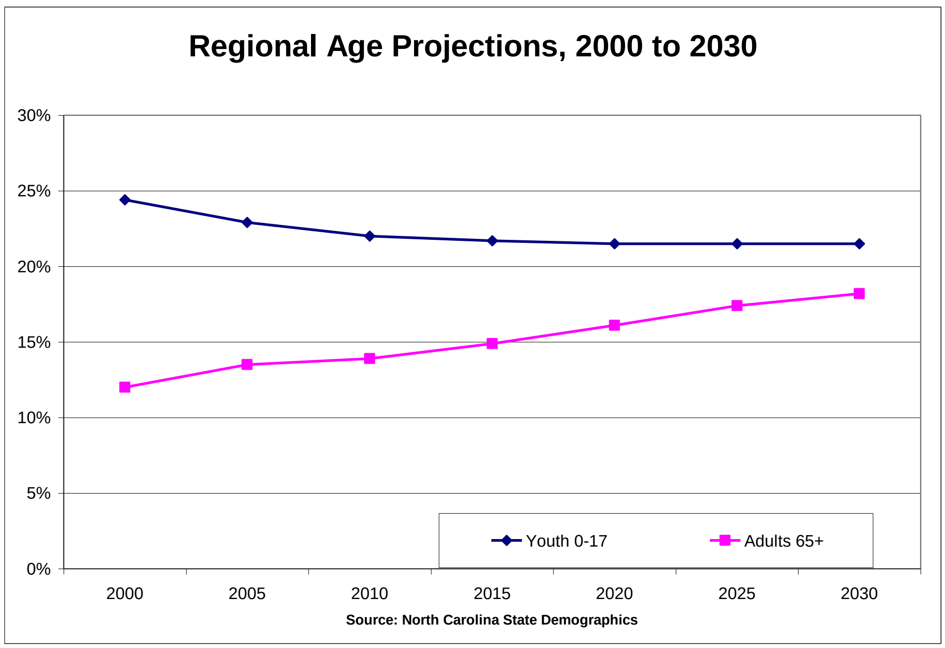


- Like other areas, the mix of young persons vs. old is changing rapidly. This is the result of the impact of the “Baby Boom” generation – persons born between 1946 and 1964.
- All counties are expected to see a continued shift toward a much older population through 2030.
- The implications of an aging population are already having a profound impact on the delivery of services and the changes in the strategies in maintaining an adequate workforce. The aging of the population will

impact services and the need for more workers in healthcare, eldercare and social services. Improved public transportation will be needed. More emphasis on adult education and retraining of workers will be necessary.

- Over the next few decades, the percentage of youth to total population will show a steady decline. The percentage of persons over the age of 65 will accelerate.
- Greater emphasis will need to be placed on education and training to assure that all new entrants to the workforce are job-ready in order to fill the gaps left by the loss of aging workers.

CHART 12: PEE DEE/REGIONAL PARTNERSHIP AGE PROJECTIONS



Race and Ethnicity Summary

- The Pee Dee/Regional Partnership Region is less ethnically diverse than the state. In the Region, 18.0% of the population is minority, compared to 25.6% in North Carolina.

- The Pee Dee Region is slightly below the state average with a minority population of 23.1%.

- Counties in the region with the highest minority representation include: Richmond (36.0%); Montgomery (22.9%); and Alamance (21.1%).

- The following table estimates the minority population as a percent of the total for the state, region and counties.

Table 2: Distribution of Population by Race by Area - 2008

	White		Non-White		Total Population
	Number	%	Number	%	Number
Alamance	115,206	78.9%	30,819	21.1%	146,025
Montgomery	21,316	77.1%	6,340	22.9%	27,656
Moore	71,580	83.9%	13,713	16.1%	85,293
Orange	103,912	80.4%	25,407	19.6%	129,319
Randolph	130,460	92.5%	10,542	7.5%	141,002
Richmond	29,998	64.0%	16,855	36.0%	46,853
Pee Dee Region	**122,894**	**76.9%**	**36,908**	**23.1%**	**159,802**
Regional Partnership	**349,578**	**84.0%**	**66,768**	**16.0%**	**416,346**
Pee Dee & Regional Partnership	**472,472**	**82.0%**	**103,676**	**18.0%**	**576,148**
North Carolina	**6,862,326**	**74.4%**	**2,364,690**	**25.6%**	**9,227,016**

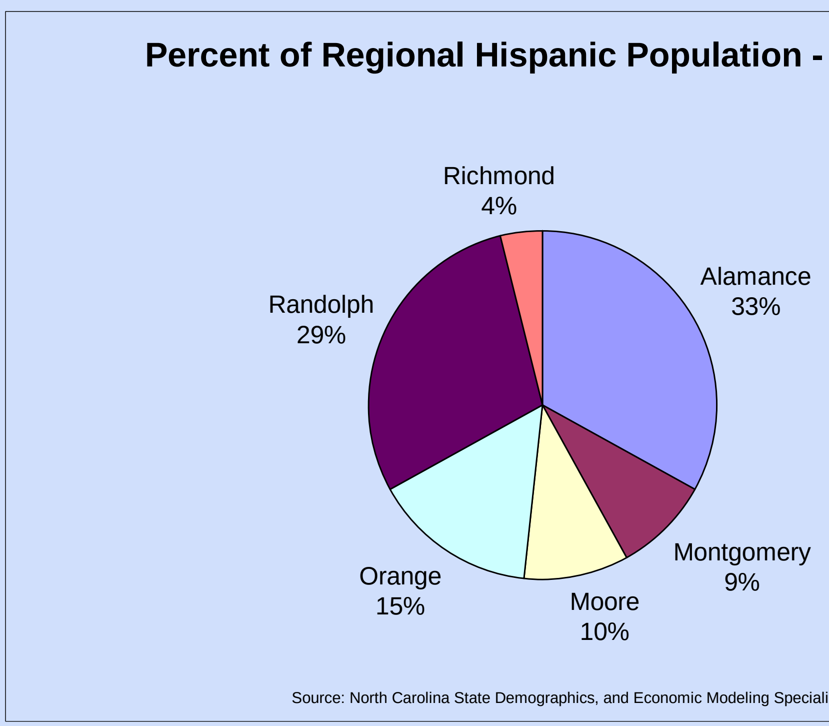
Source: North Carolina State Demographics

Hispanic Growth: What Does It Mean for the Region?

The addition of nearly 44,000 Hispanic residents in the region since 1990 brings with it challenges and assets. The Hispanic population is a significant source of labor, and growth in the Hispanic population often overlaps with revived or growing economies. If Hispanic neighborhoods become increasingly segregated, they will likely experience declining access to retail centers, growing dependence on government assistance, underfunded schools and social services, and transportation barriers to employment. The extent to which Hispanic immigrants integrate spatially within a community directly affects their interaction with the community as well as attitudes toward ethnic and racial diversity.

The increased diversity of the 21st century workforce will require that individuals and firms rethink the traditional meaning of workforce diversity. In the future, workforce diversity will refer less to black/white racial diversity, but increasingly to diversity of culture, age, gender, skills, abilities and religion. Incorporating these diverse individuals into the workforce will present new challenges and policy issues to be addressed, but the rewards of doing so will be considerable for individuals, firms and the Pee Dee/Regional Partnership economy.

Chart 13: Percent of Hispanic Population, Pee Dee/Regional Partnership, '08



- The Hispanic population in the entire region rose from 6,068 in 1990 to 50,427 in 2008.
- Since 2000 the Region's Hispanic population rose by 18,576, or 58.3%
- Three counties account for 75% of the region's Hispanic population. They are Alamance, Randolph and Orange.
- Four counties in the region have Hispanic population exceeding 10% of total population. They are: Montgomery (16.0%); Alamance (11.4%); and Randolph (10.4%).

Educational Attainment

Across the United States, jobs are requiring more skills and consequently, employers are placing greater demand on workers to have more complex skill sets and higher educational attainment. Regardless of where they ultimately live and work, today's labor force will need an unprecedented level of education and technical skills to compete in the increasingly high-skill economy. Educational attainment can be used as an indicator for regional workforce readiness and serves as a basic measure of a region's workforce competitiveness.

Educational Attainment Summary

- On average, Pee Dee/Regional Partnership lags behind North Carolina and the U.S. in terms of educational attainment (persons age 25+).
- The region has a higher percentage of persons who did not graduate high school (19%), compared with North Carolina (17%) and the U.S. (15%).
- Only Moore (13%) and Orange (10%) had lower percentages of non-high school completers than North Carolina and the U.S.
- Within the region, three counties had percentages exceeding 20% (persons with less than H.S. completion). The counties are: Montgomery (30%); Richmond (25%); and Randolph (25%).
- In the entire region 26% have bachelor degrees or higher compared with 26% for North Carolina and 28% for the U.S.
- Four counties had relatively low percentages of persons who have a bachelor's degree or above: Alamance (22%); Randolph (13%); and both Richmond and Montgomery at 12%.

- Moore (30%) and Orange (55%) were the only two counties that exceeded the U.S. average.

- The educational attainment issue needs to be addressed. Economic development depends on a well educated and trained workforce.

Educational Attainment: What Does It Mean for the Region?

Educational attainment plays a critical role in virtually every labor market outcome. On average, the more education people have, the more likely they are to seek and find jobs, earn higher wages and retire with a pension. A labor force with low education levels poses a challenge for counties seeking economic development. Employers are more attracted to areas offering concentrations of well-educated and skilled workers, and low wage levels are no longer sufficient to attract businesses. Furthermore, as more and more communities continue to raise the education levels of their residents, it will become increasingly difficult for the region to remain competitive without addressing relatively low educational attainment levels. Many post-secondary institutional resources already exist in the region. The community colleges, universities and other schools are providing educational opportunities to a wide range of people and must continue to be used as an asset in economic and workforce development.

Table 14: Educational Attainment – Persons Age 25+

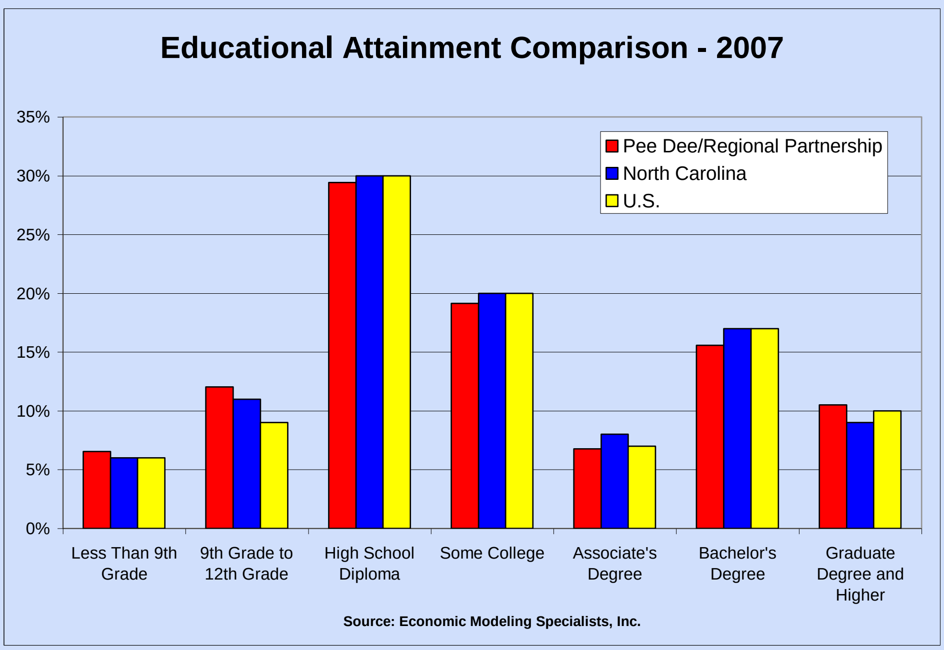


CHART 15: LESS THAN HIGH SCHOOL COMPLETIONS

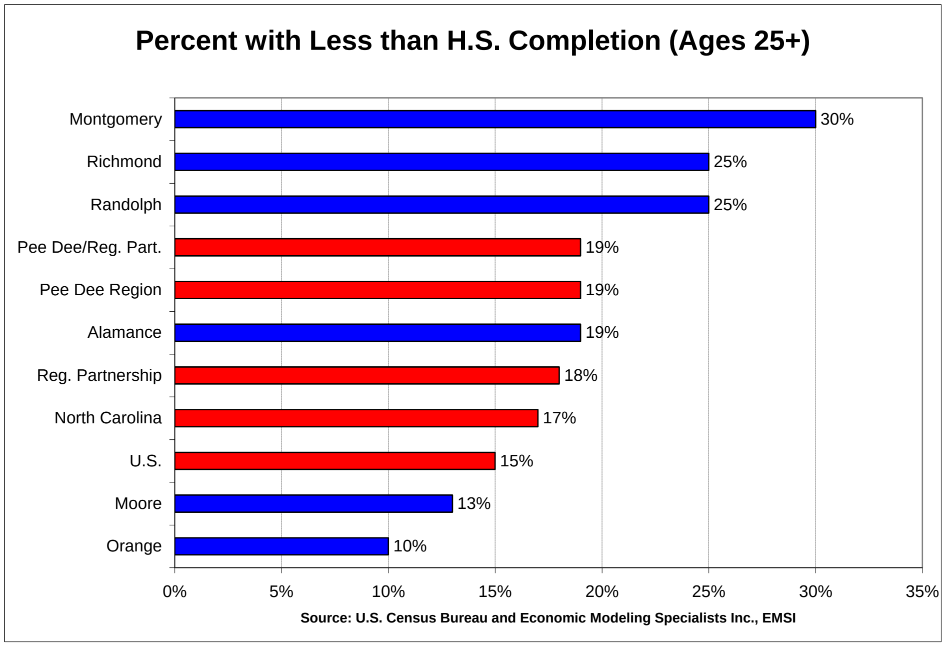
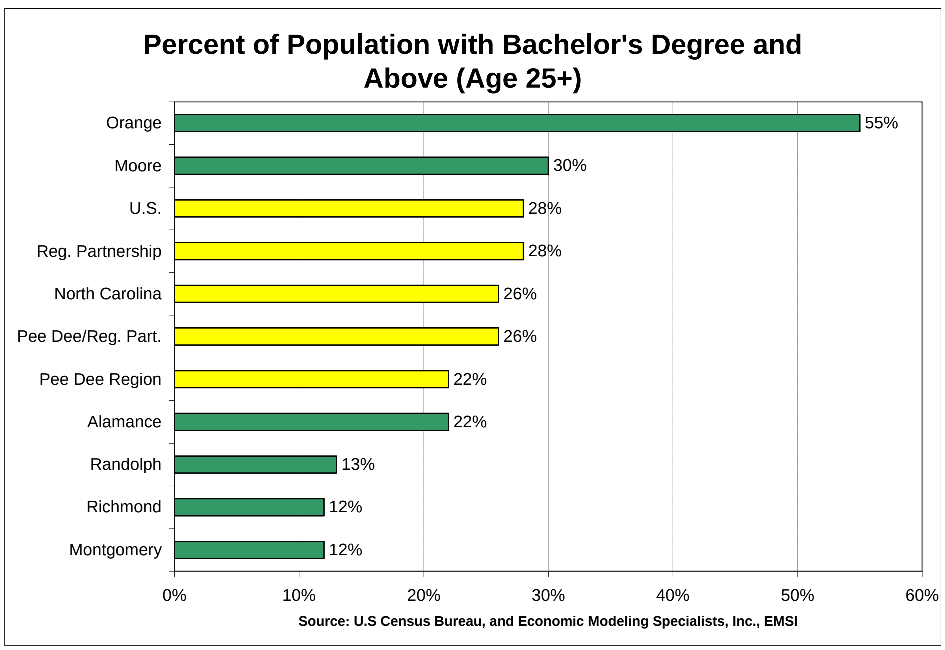


CHART 16: BACHELOR'S DEGREE AND ABOVE



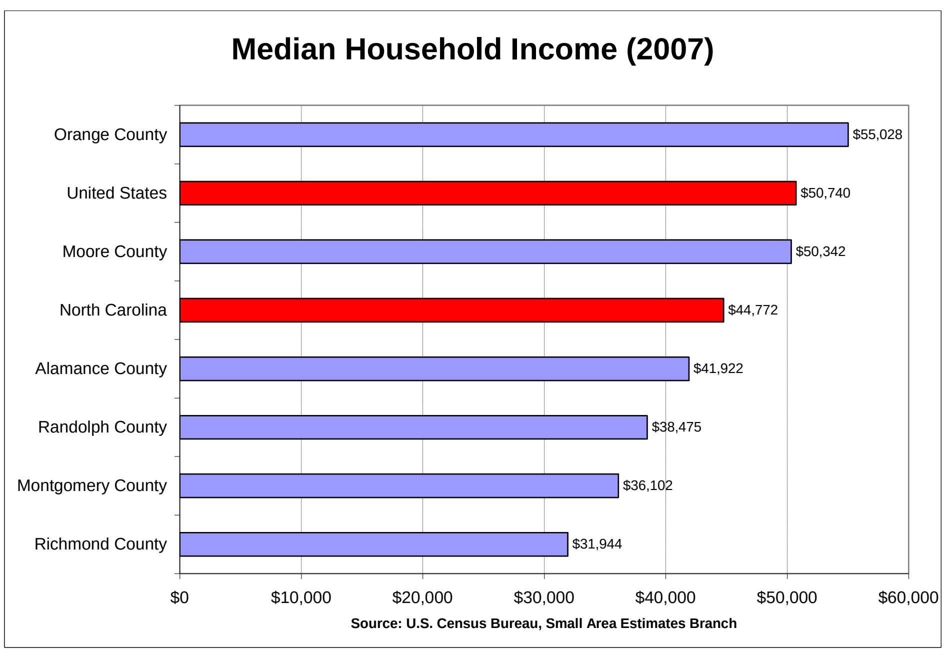
INCOME, WAGES AND HOUSING

The income/wage levels and home values in a community are often used as an indicator of the economic well-being of residents. Trends in income reflect local economic growth, population characteristics, poverty status, business climate, standard of living and the region's ability to provide adequate public services. Home ownership, vacancy rates and affordable housing are all indicators of a grounded workforce that is not prone to move in an economic downturn. It is also an indication of housing quality and the ability of an area to both provide housing that attracts new workers to the region and maintain the housing needs of the current workforce.

MEDIAN HOUSEHOLD INCOME

- For the most part, income levels in the region are lower than the U.S. and for North Carolina.
- The U.S. Median Household Income was $50,740 compared with $44,772 for North Carolina.
- Five of the six counties in the region were lower than the U.S.
- The highest was Orange County with median household income of $55,028 and the lowest was Richmond at $31,944.

CHART 17: MEDIAN HOUSEHOLD INCOME BY AREA



Per Capita Income

- Another source of income data is per capita income. Data for all areas are available through 2007.

- As with household income, per capita income in North Carolina ($33,735) is much lower than the U.S. average ($38,615). Most of the counties in the region are well below the U.S. number.

- The counties in the region with the highest per capita income were Orange ($43,844) and Moore ($37,800). The lowest were Richmond ($25,574), Montgomery ($26,270) and Randolph ($27,160).

- During the 2000 to 2007 period, North Carolina and most of the counties in the area had slower per capita income growth. Orange had large gains in per capita income, rising by 42.0%. Alamance had the smallest gain at 13.4%.

Chart 18: Per Capita Income Trends

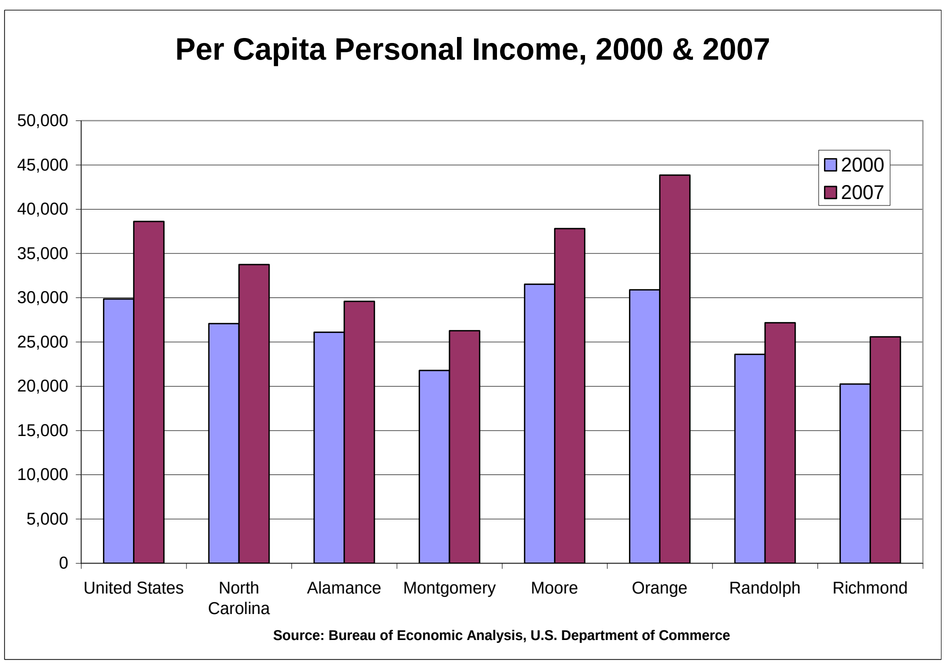
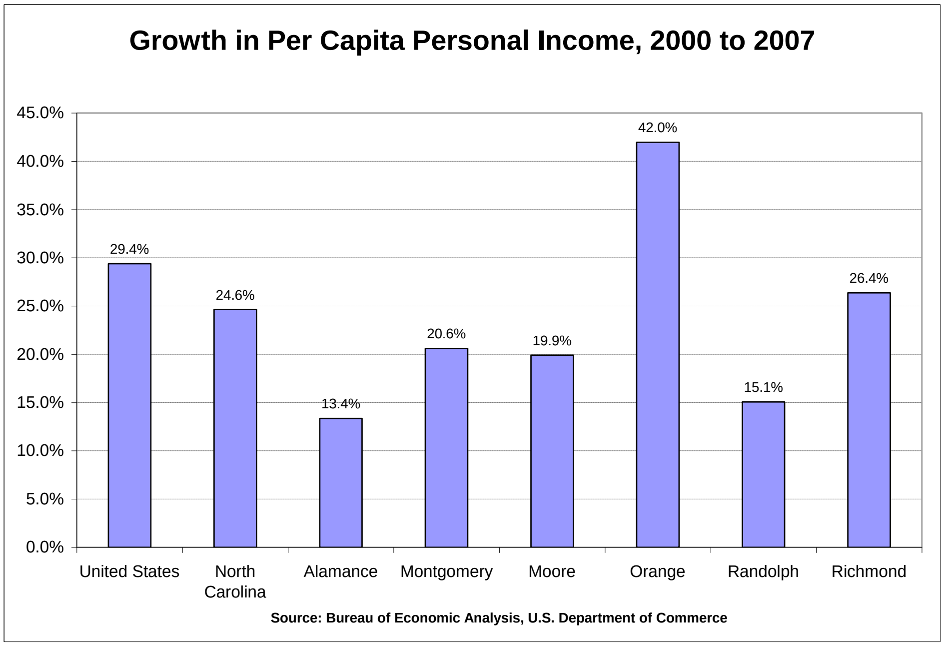


Chart 19: Per Capita Income Trends



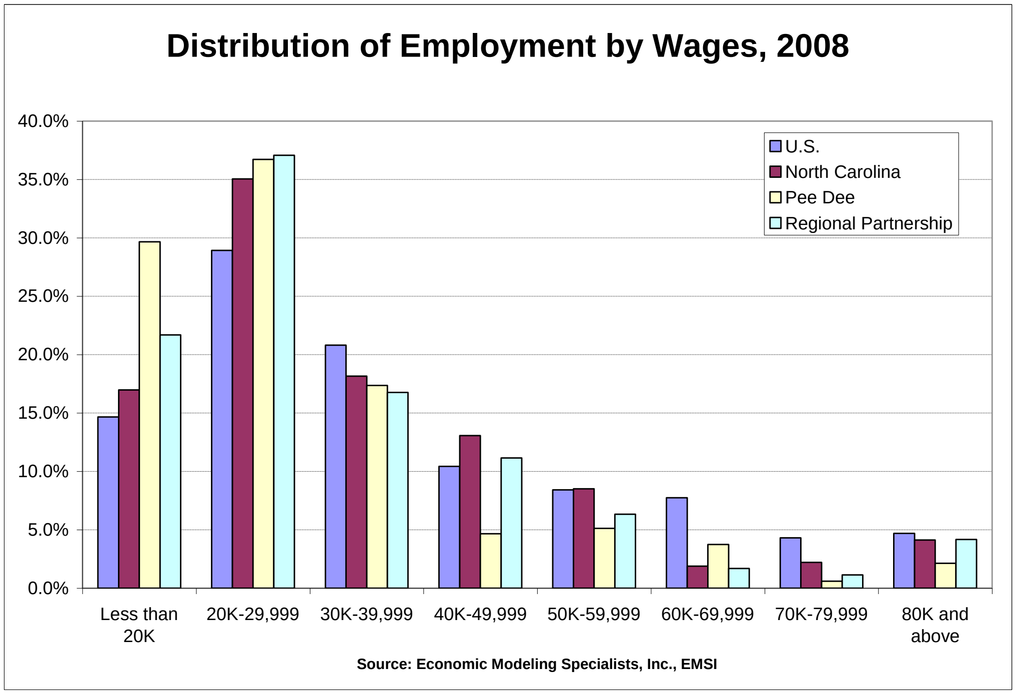
Wage Distribution

- North Carolina, Pee Dee, and the Regional Partnership compared to the U.S. have a greater percent of jobs paying less than $30,000 annually. About 60% of the jobs in the region pay less than $30,000.

- The U.S. has a larger percentage of high-wage jobs compared to North Carolina and Pee Dee and Regional Partnership areas.

- This is where we are seeing a divide in the economy and the work force.

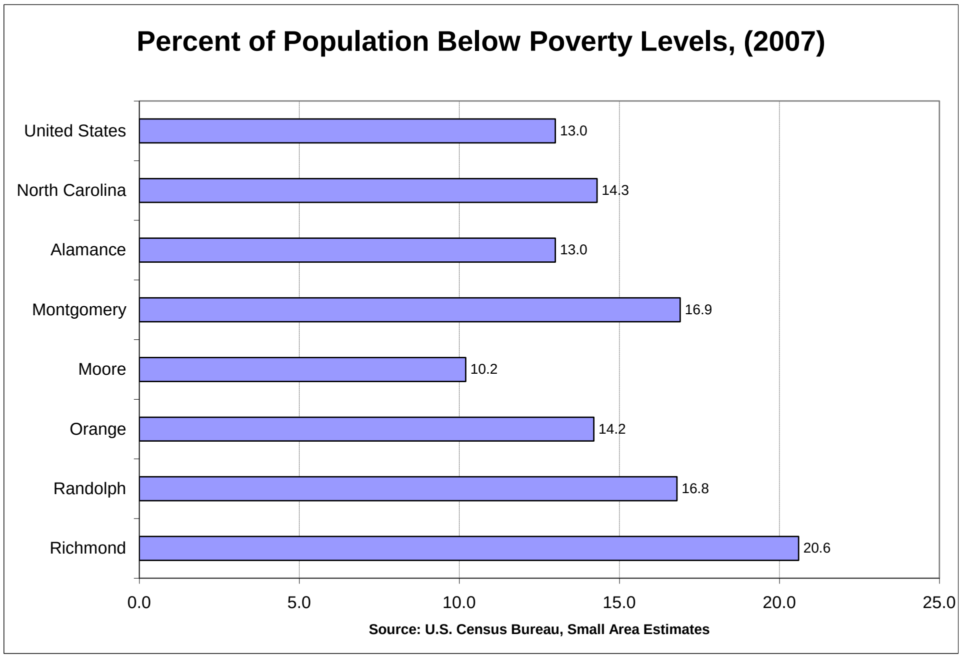
Chart 20: Wage Distribution Comparison



Poverty

- Poverty levels are relatively high in the Pee Dee/Regional Partnership area.
- For North Carolina the percentage of persons below the poverty level was 14.3% compared to 13.0% for the U.S.
- Moore County had a rate of 10.2% which was below the U.S. Alamance at 13.0% had the same rate as the U.S. All other counties in the region were higher.
- The highest were: Richmond (20.6%); Montgomery (16.9%); and Randolph (16.8%).

CHART 21: POPULATION BELOW POVERTY LEVEL



HOUSING SUMMARY

HOUSING AVAILABILITY AND AFFORDABILITY

- The information in the next section was obtained from the American Community Survey, 2007 (Census Bureau). This information represents an average of three years (2005-2007). Since it covers a three-year period, the sample is larger – therefore data for all counties are now available. U.S. and North Carolina data have also been included.

- The vacancy rate in Montgomery, Moore and Richmond are relatively high and exceed the rate for North Carolina and the U.S.

- The occupancy rate was higher than the U.S. and North Carolina in three counties- Alamance, Orange and Randolph.

- Housing values are much lower in North Carolina than in the U.S. Moore County was higher than North Carolina but lower than the U.S. Orange County was higher than both the U.S. and North Carolina. Montgomery and Richmond had the lowest values.

- Percent of renters paying more than 30% of income – Orange, Randolph and Alamance were higher than the statewide average.

- Percent of home owners paying more than 30% of income – North Carolina is below the U.S. rate. Alamance and Montgomery were higher than the statewide average but below the U.S. rate. Richmond was the highest in the region, and higher than the U.S. and North Carolina.

CHART 22: OCCUPIED AND VACANT HOUSING COMPARISON

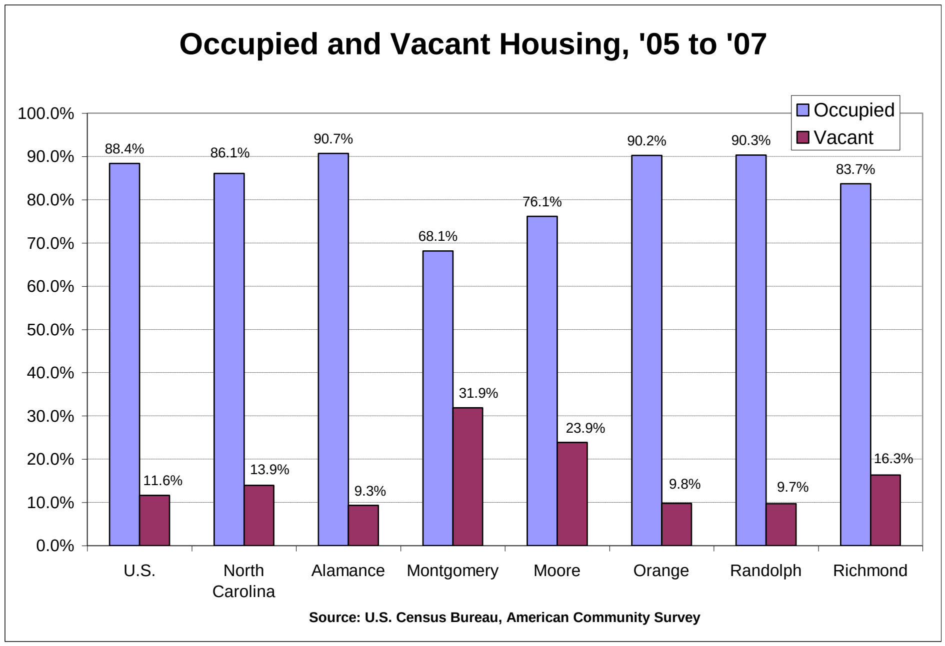


CHART 23: MEDIAN VALUE OF HOMES

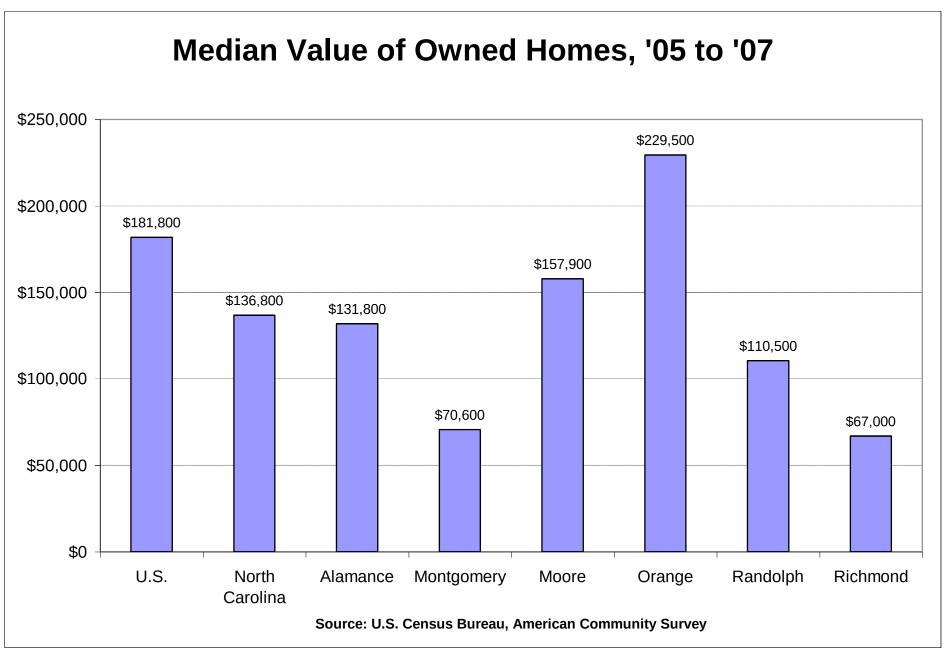
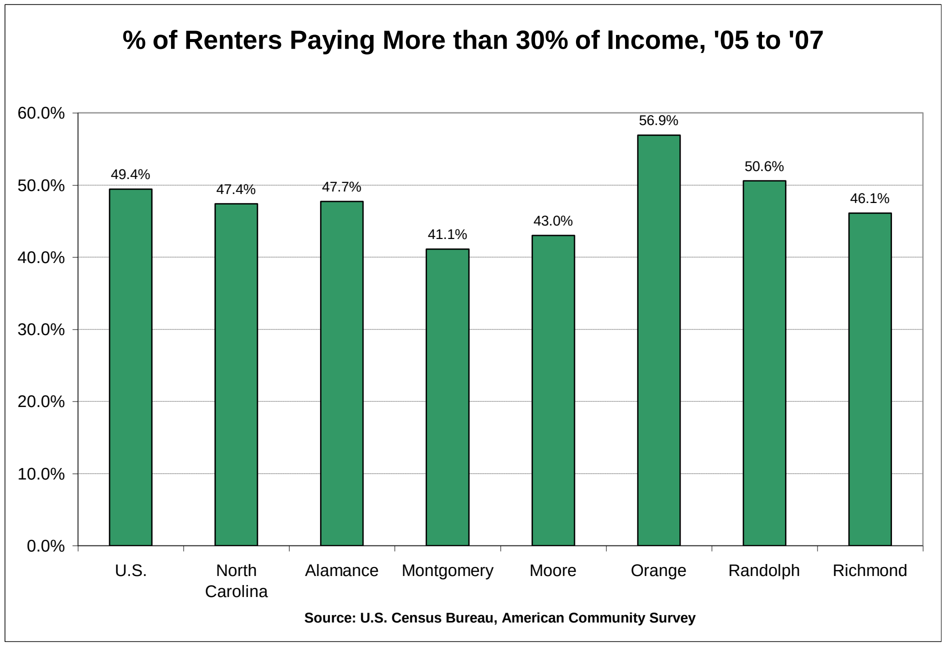


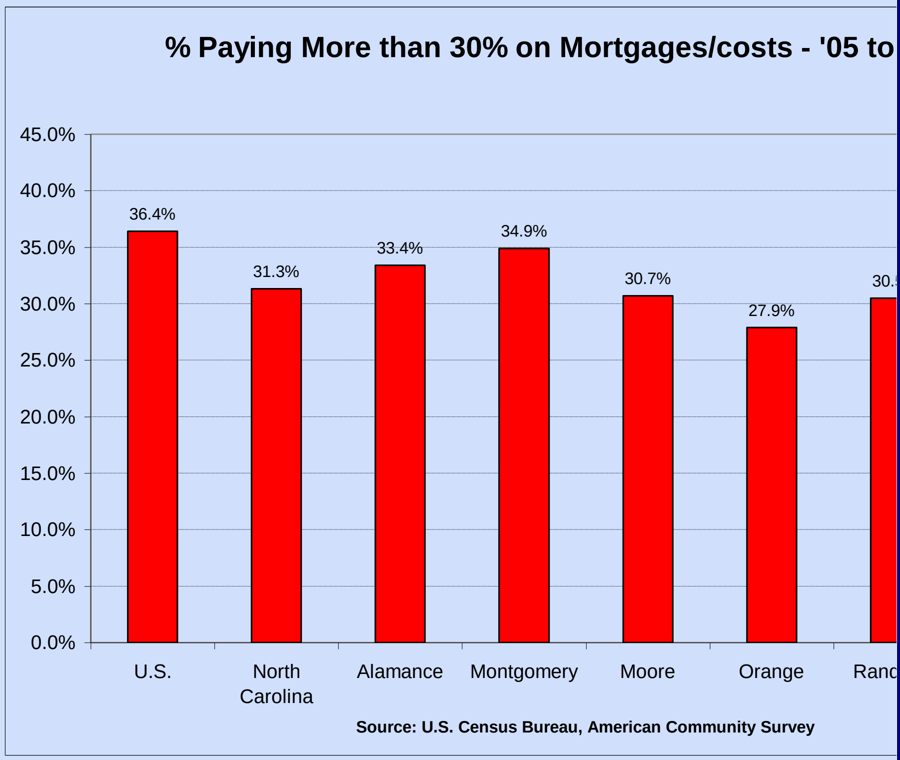
CHART 24: RENTERS PAYING MORE THAN 30% OF INCOME



Affordable Housing: What Does It Mean for the Region?

In 2006, about 36% of American households spent more than 30% of income on housing. At the source of the affordability problem is the mismatch between the large number of low-wage jobs that the U.S. economy is generating and the high cost of supplying housing. Solutions are therefore hard to come by, requiring close cooperation of government, businesses and nonprofit providers alike. Providing affordable quality housing will serve as an attraction and increase both population growth and the standard of living.

Chart 25: % of Homeowners Paying More than 30% of Income on Mortgage/Costs



Labor Force and Unemployment

Labor force totals are based on the number of people who are currently employed, and those who are unemployed but looking for work. Labor force growth and the unemployment rate are both key economic indicators. The widely cited unemployment rate provides a good measure of the relative utilization of labor in the region. These measures are "residency-based," providing current information on the labor force status of residents in the county or region.

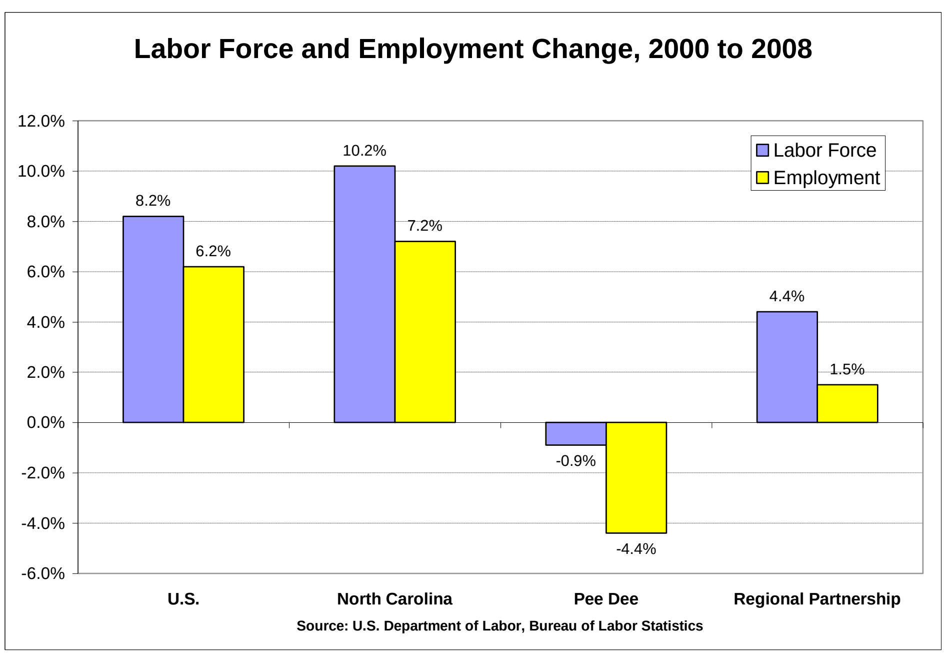
- From 2000 to 2008 the labor force grew much faster in North Carolina than for the U.S., 10.2% vs. 8.2%. However in the Pee Dee Region, labor force declined by -0.9 while growth in Regional Partnership was just 4.4%.

- During the period, employment grew faster for North Carolina (7.2%), than for the U.S. (6.2%). Pee Dee experienced a drop of -4.4%. The Regional Partnership grew at a rate of just 1.5% during the period.

- At the county level, Orange experienced the largest growth, 6.0% in employment ('00 to '08). Other counties had little or no growth. In fact, Montgomery and Richmond experienced sharp declines.

- Due to the lingering recession, the short-term outlook is not favorable. Larger losses are expected in 2009 and possibly into 2010.

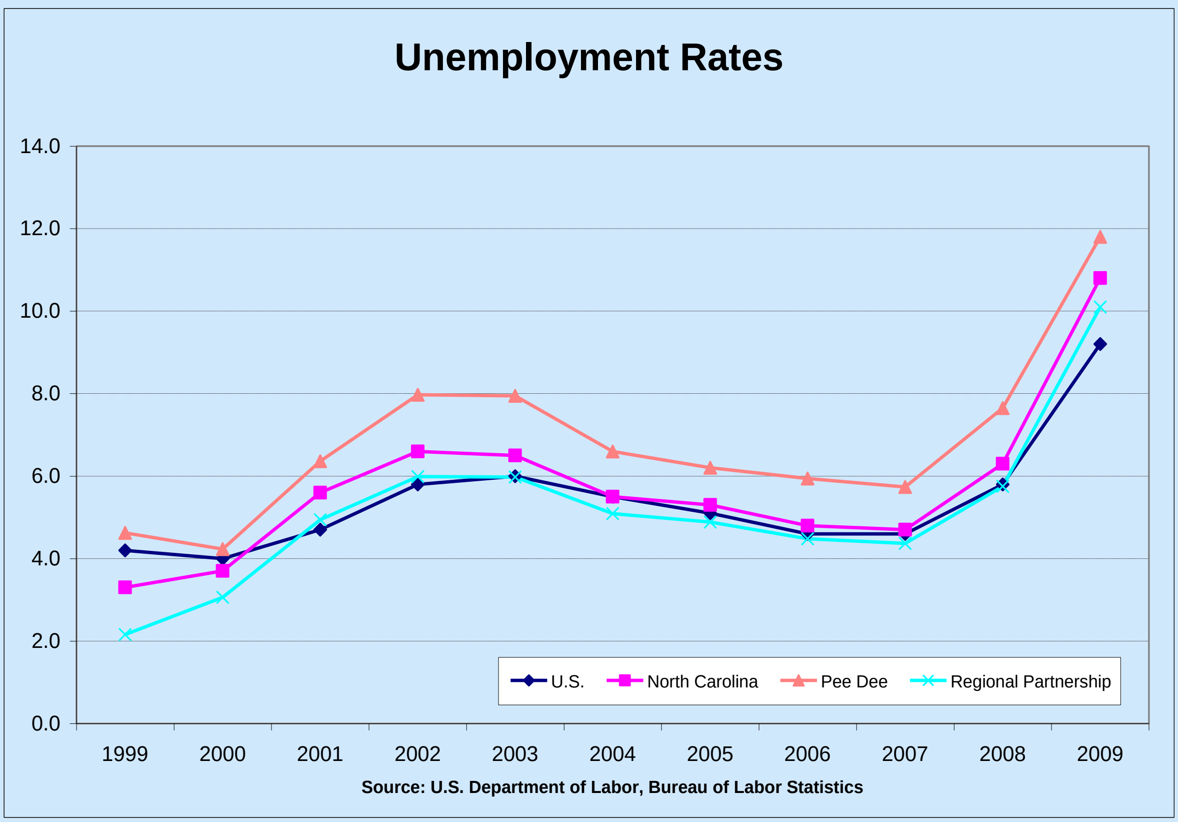
Chart 26: Labor Force and Employment % Change, 2000 to 2008



Unemployment Rate: What Does It Mean for the Region?

The unemployment rate may be considered the single most informative labor market indicator reflecting the general performance of the labor market and the economy as a whole. The unemployment rate tells us the proportion of the labor force that does not have a job but is available and actively looking for work. In this report, the changing job market in North Carolina and the region is emphasized when the unemployment rate went well above 10%. The region was feeling the effect of the national recession and the large loss of key manufacturing jobs. The unemployment rate for Pee Dee has remained higher than the North Carolina and U.S. rate for the entire period. Rates for the Regional Partnership have tracked closely to the soaring statewide rates. Unemployment rates are considered an indicator that confirms economic situations, but it does not foreshadow long-term economic trends. By diversifying its economy, the region can guard against future economic downturns in specific industries.

Chart 27: Unemployment Rates, '99 to '09

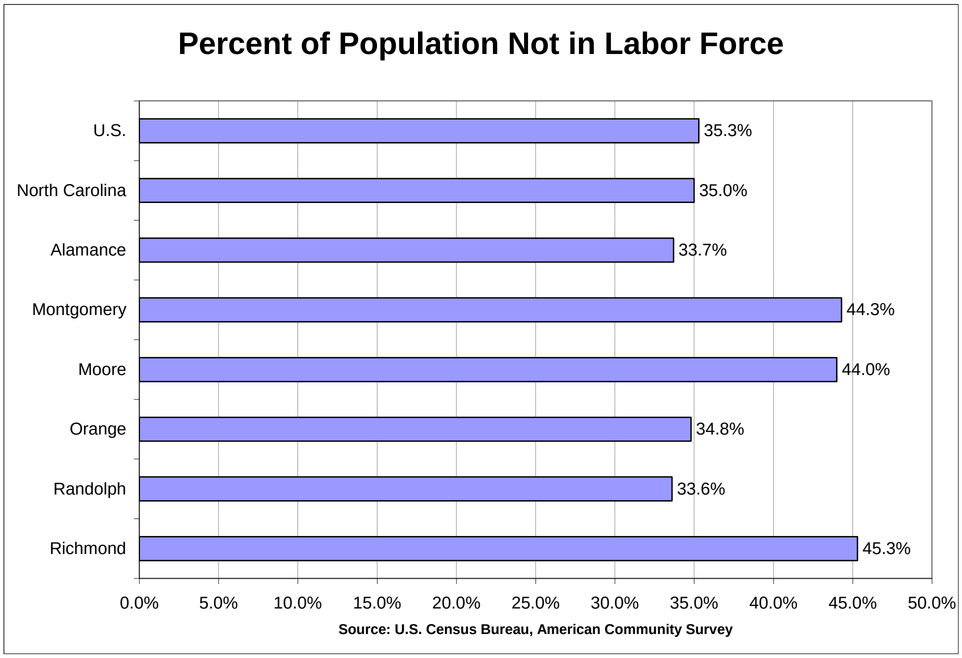


- The Pee Dee Region has had much higher unemployment rates than North Carolina and the U.S.
- In 2002 the unemployment rate was 6.6% in North Carolina, 8.0% for Pee Dee, and 6.0%for the Regional Partnership. Since 2002, the unemployment rate has dropped each year through 2007 – but remained at relatively high levels for Pee Dee.
- In 2008 the annual unemployment rate for the U.S. was 5.8%; North Carolina (6.3%); Pee Dee (7.6%); and 5.8% for the Regional Partnership.
- In 2008, only Orange at 4.0% had a lower rate than North Carolina. Richmond had a rate of 9.6% while Montgomery was also high at 8.5%.
- In 2009 unemployment rates for all areas are much higher. North Carolina has had one of the highest unemployment rates in the U.S. Both Pee Dee and the Regional Partnership have seen rates in excess of double digits.

POTENTIAL SUPPLY OF WORKERS (% OF POPULATION 16+ NOT IN THE LABOR FORCE)

- A good measure of labor force supply is the percentage of persons not in the labor force. The labor force consists of persons working or actively seeking employment.
- Persons not in the labor force include individuals in school, on disability, retired, homemakers and persons who have stopped searching for jobs (discouraged workers).
- North Carolina at 35.0% was close to the U.S. average of 35.3%. Counties with the highest rates were: Richmond (45.3%); Montgomery (44.3%); and Moore (44.0%).

CHART 28: PERCENT OF POPULATION NOT IN THE LABOR FORCE, 2005 - 2007



EMERGING WORKFORCE

Improving the coverage and quality of education for youth in the area is essential to raising the productivity and improving employability in a competitive labor market. Improving youth performance in schools, career awareness and work readiness, in terms of work ethic and hard skills, will have a positive impact on the employability of youth. Preparing the youth for future employment, social participation, entrepreneurship and lifelong adaptation to a changing economy, increasingly requires higher levels of education, community support and strategic planning.

YOUTH SUMMARY

- The region has a slightly smaller percentage of youth compared to the state and the nation. In 2008, the youth population (0-17) was estimated at 128,700 for Pee Dee/Regional Partnership, representing 22.3% of the total population.

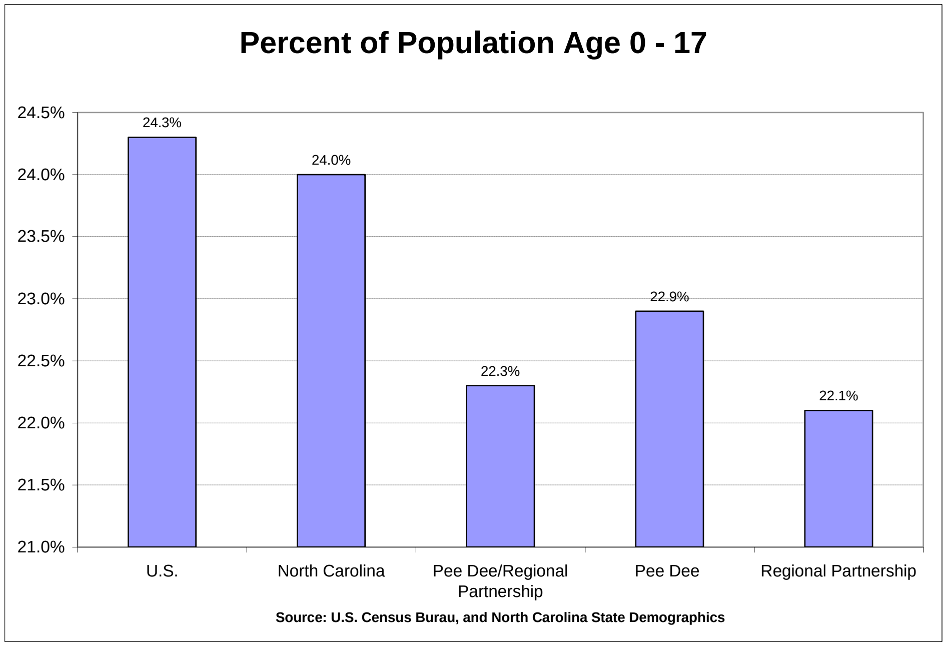
- Like poverty for all age groups, youth poverty rates are also higher in the region than for the U.S. and North Carolina. Three counties had extremely high youth poverty rates.

- The U.S. youth poverty rate was 18.0%, North Carolina was 19.5%.

- The highest youth poverty rates were: Richmond (28.8%); Randolph (25.1%); and Montgomery (23.7%).

- The lowest youth poverty rate was in Orange at 11.5%.

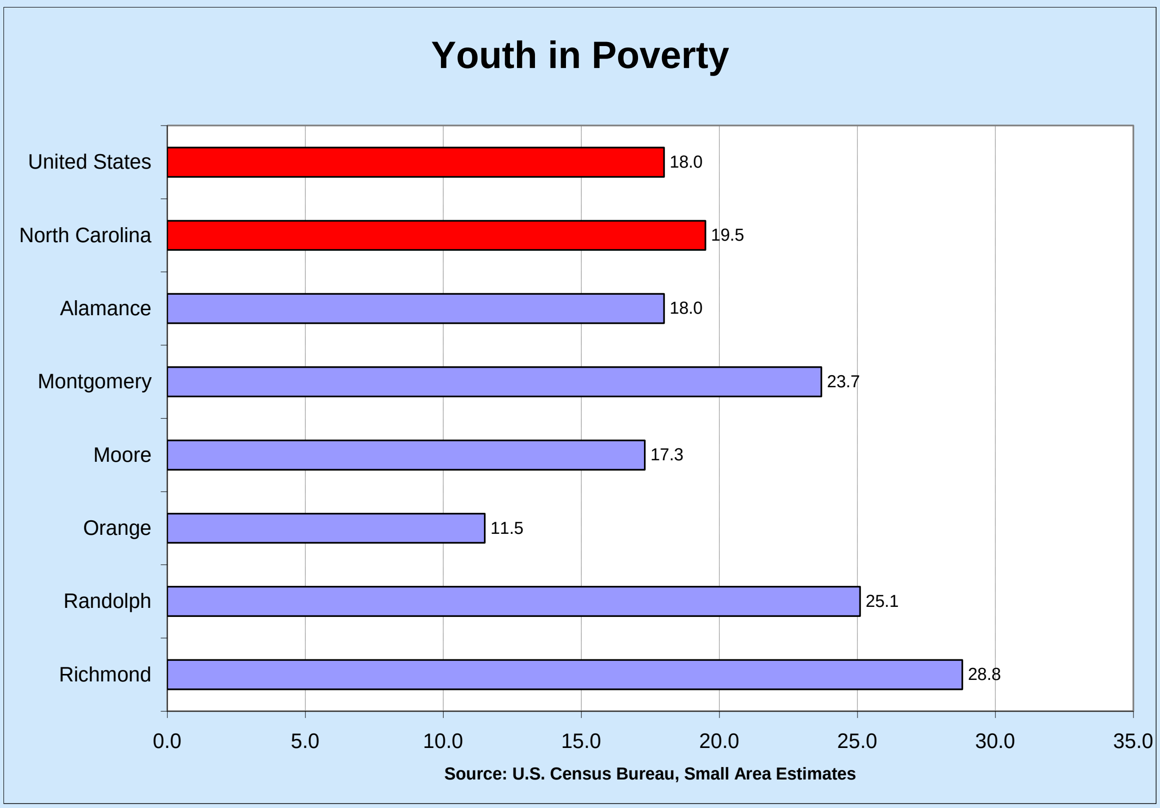
Chart 29: Percent of Population Age 0 – 17, 2008



Youth in Poverty: What Does It Mean for the Region?

Youth poverty rates are extremely high in three of the six counties in the region. Poverty can be accompanied by low levels of educational attainment, illiteracy and unemployment, all of which hinder the potential of the emerging workforce to meet current and future demands of a changing economy. The high level of poverty in the region could potentially limit economic opportunities for youth in the region, as well as hinder the region's overall competitiveness in an increasingly global economy.

Chart 30: Percent of Youth in Poverty, 2007



Youth in School

A substantial number of jobs require applicants to have at least a high school diploma or equivalent. High school proficiency exam scores and ACT/SAT tests provide an indication of trainability and a capacity for learning. Student performance, teacher qualifications and technology in the classroom help to determine youth's ability to succeed and adapt in the changing workplace.

- One measure of educational quality is the retention rate (Graduation rate). The retention rate is the ratio of graduates (diplomas and certificates) at the end of the current school year to ninth grade final enrollment four years earlier. For the most recent year (2007-2008) the retention rate was 70.0% for North Carolina. It was higher in five of the six counties in the region. The highest rates were for Orange (75.3%) and Montgomery (74.6%). Richmond was well below the others at 65.1%

- The State annual dropout rate for 2007-2008 was 4.97%. Three of the counties had higher rates – Alamance, Montgomery and Randolph. Moore had the lowest rate at 4.29%.

- Test scores (2007): The Statewide 8th grade math score was 66.3% (reaching proficiency). All but two counties in the region were below the North Carolina average. Those were Alamance and Moore. The 8th grade English score for North Carolina was 89.8%. Only Moore and Orange were at or above the statewide score.

- Two of six counties in the region had a higher percentage than the state for students participating in the free/reduced price lunch program. The statewide percentage was 43.2%. Montgomery had a percentage of 65.9% participating and Richmond was at 63.5%. The lowest in the region was Orange at 31.3%.

Workforce Demand Assessment

Current Employment, Historical Growth, & Projected Growth

Looking at major industry divisions and industry sectors offers information on where most of the jobs are in the community, thus allowing more tailored education and training programs. Coupled with industry projection, these analyses can help predict where the workplace will be in the future.

The data provided in this section create an economic picture to help determine which industries employ the largest number of people, which industries have been growing or declining in the region and which industries are projected to grow in the region. Each piece of information provides a clue to where the region's economic advantages are, but the combination of industry employment, wages, location quotient and projected growth can provide the baseline information needed to develop long-term goals for economic viability.

Distribution of Industry Employment Summary (2008)

Pee Dee and Regional Partnership

- The Pee Dee Regional Partnership in 2008 had 299,500 jobs with an average annual pay of $38,246.
- The largest sector was Government with 19.4% of jobs. Reasons for Government's size are that in addition to federal, state and local workers, it also includes public education (through the college level).
- The next largest industry is Manufacturing with 39,400 jobs (13.2% of jobs). Manufacturing has above average pay of $44,099. The problem is that Manufacturing employment has been declining and this is expected to continue. Since 2002, Manufacturing employment declined by 20% while total employment rose by 6%.
- Next with 31,400 jobs (10.5%) is Retail trade. Annual wages in this sector are very low at $24,668.
- Another large sector is Health care and social assistance with about 31,200 jobs (10.4%). Wages in this group averaged just $39,812. While many health care jobs pay very high wages, there are others that pay below average (i.e. in social assistance).
- Here is the challenge: In the private sector the industries with the most jobs have relatively low wages. Industries with above average wages

(Utilities, Mining, and Management of companies and Information) have very small employment totals.

Note: At the 3-digit NAICS level the largest private industry is Food services and drinking places with 17,800 jobs. The average pay for this industry per year was just $15,007. Next were Administrative and support services with 15,100 jobs. The pay for this industry was $21,086.

Pee Dee Region

- The Pee Dee Region in 2008 had 75,400 jobs with an average annual pay of $33,400.
- The largest sector was Health care and social assistance with 11,600 jobs, 15.4% of total. Average pay is $43,421.
- The next largest industry is Government with 10,100 jobs (13.4% of jobs). Government has above average pay of $41,346.
- Next in the Pee Dee Region with 9,311 jobs (12.4%) is Manufacturing. Annual wages in this sector are slightly above average at $36,699.
- Like in other areas, Retail trade is a large industry with about 8,400 jobs (11.1%). Average annual pay is $24,203.

Note: At the 3-digit NAICS level the largest private industry is Food services and drinking places with 3,773 jobs. The average pay for this industry per year was $14,516. Next was Ambulatory Health Care Services with 3,578 jobs. The pay for this industry was $63,424.

Regional Partnership

- The Regional Partnership in 2008 had 224,200 jobs with an average annual pay of $39,925.
- The largest industry was Government with 47,900 jobs (21.4% of jobs). Government has above average pay of $56,572. This region includes Orange County which has a very large base of jobs in the post-secondary education area.
- Next was manufacturing with 30,100 jobs. Average pay was an above average of $46,275. Despite job losses over the years, Manufacturing still plays a major role in the local economy.
- Retail trade was third with about 23,000 jobs (11.1%). Average annual pay is $24,850.

Note: At the 3-digit NAICS level the largest private industry is Food services and drinking places with 13,800 jobs. The average pay for this industry per year was $15,165. Next was administrative and support services with 11,900 jobs. The pay for this industry was $22,378.

Chart 31: Largest Sectors in the Pee Dee/Regional Partnership Area

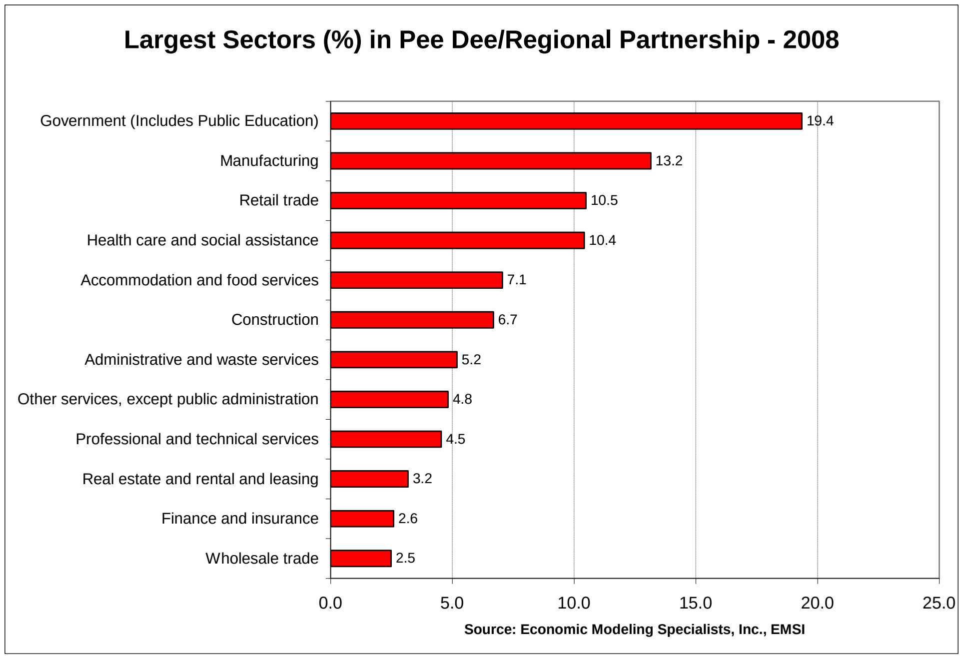


CHART 32: LARGEST SECTORS IN THE PEE DEE REGION

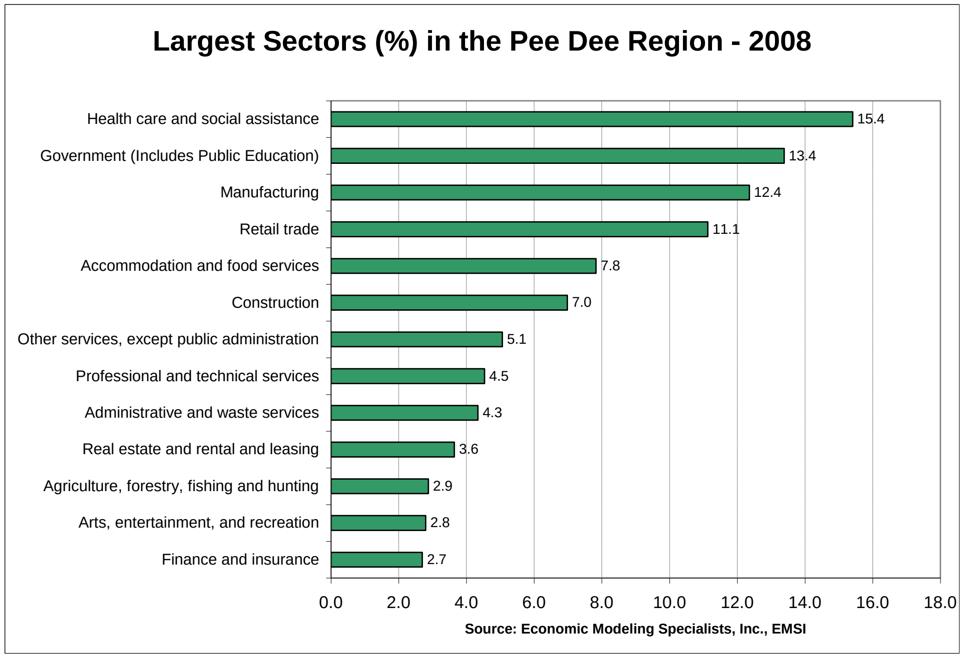


CHART 33: LARGEST SECTORS IN THE REGIONAL PARTNERSHIP REGION

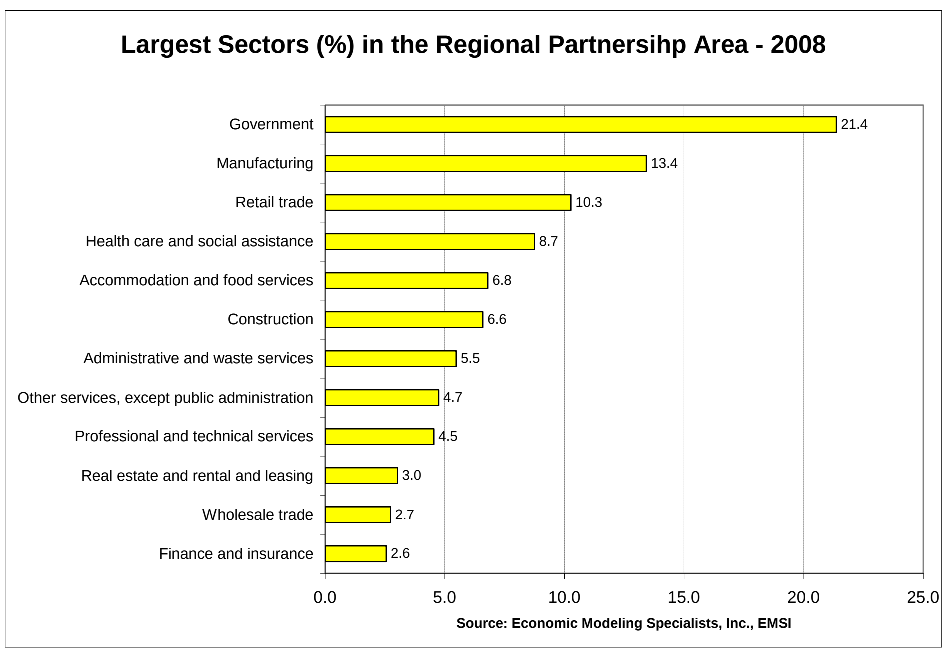


Chart 34: Industries with the Highest Wages – Pee Dee/Regional Partnership

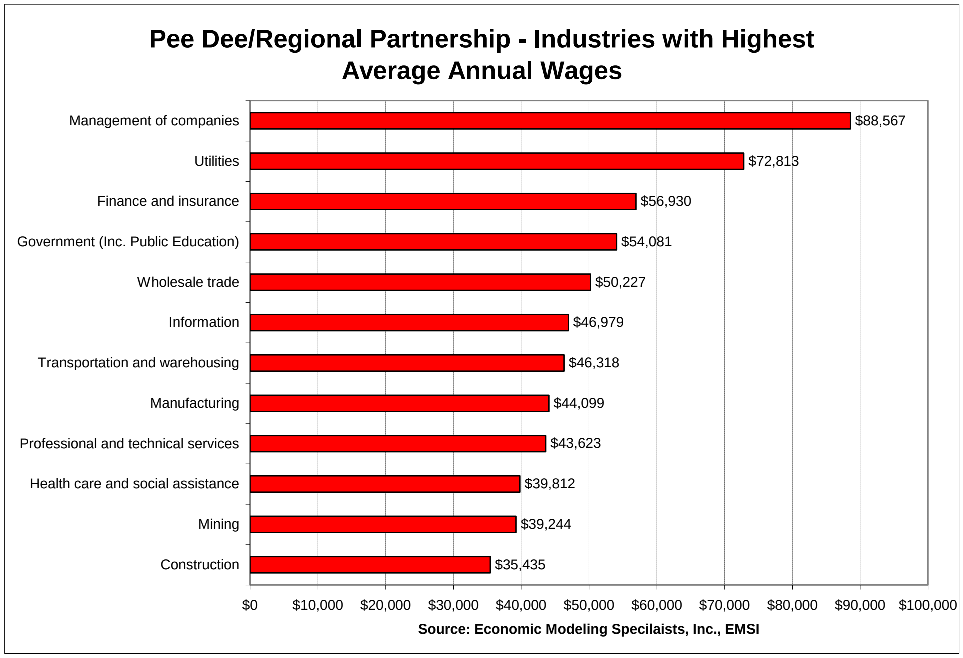


Chart 35: Industries with the Highest Wages – Pee Dee Region

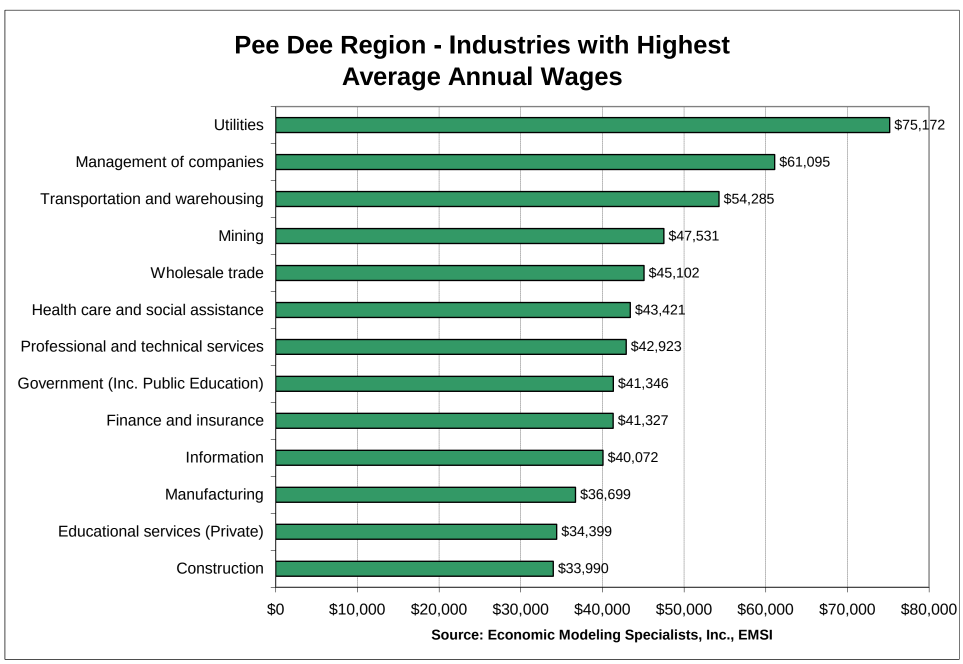
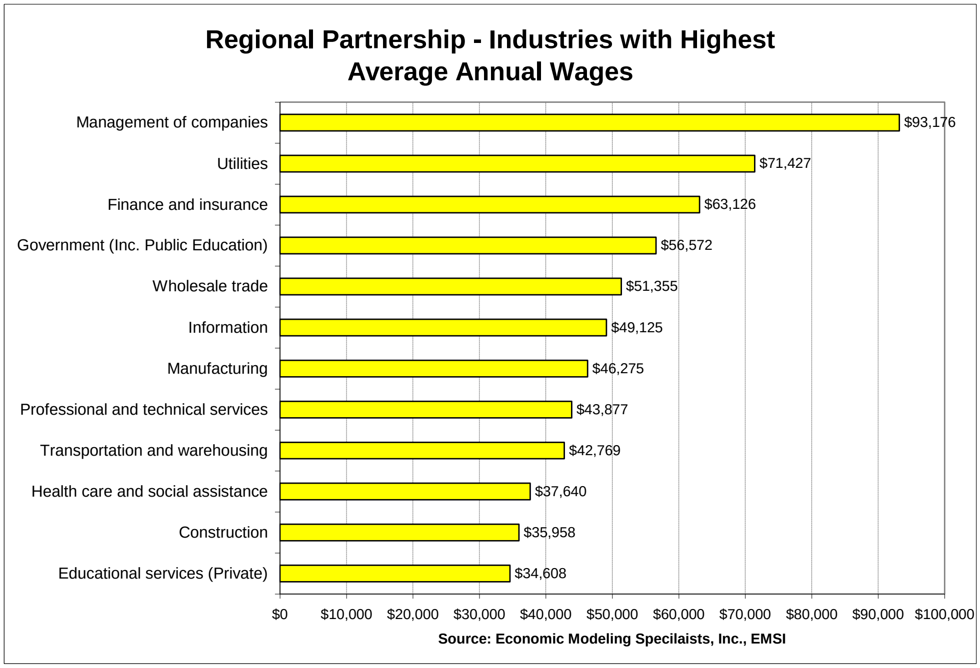


Chart 36: Industries with the Highest Wages - Regional Partnership



Industry Wages Summary (2009)

- For the entire area (Pee Dee/Regional Partnership) the highest average annual wages are found in Management of companies ($88,567), Utilities ($72,813), Finance and insurance ($56,930) and Government ($54,081).

- The lowest average annual wages are in Accommodation and food service ($16,440), Arts, entertainment and recreation ($16,794), Other Services ($19,372), Real estate rental and leasing ($20,563), and Agriculture, forestry, fishing and hunting ($22,194).

Industry Growth Summary (2002 to 2008)

Pee Dee/Regional Partnership

- Health care and social assistance had the largest net change during the period gaining 5,900 jobs.

- Next was Government with a gain of 4,500 jobs.

- Three industries rose by relatively large amounts. They were: Administrative and waste services (3,500); Construction (2,800); and Accommodation and food service (2,700).

- Manufacturing is still the region's largest private sector industry despite a loss of 10,100 jobs during the period.

- Other industries that had net losses were: Finance and insurance (-857); Agriculture, forestry, fishing and hunting (-854); and Transportation and warehousing (-465).

Pee Dee Region

- Health care and social assistance had the largest net rise during the period gaining 1,400 jobs.

- Next was Professional and technical services with a gain of 1,000 jobs.

- Third largest growth occurred in the Administrative and waste service industry with a gain of about 900 jobs.

- Manufacturing declined by -27% losing nearly 3,400 jobs.

Regional Partnership

- Health care and social assistance had the largest net change during the period gaining 4,500 jobs.

- Next was Government with a gain of about 4,000 jobs. Much of this was in the public education area.

- The next three industries were: Construction (2,633); Administrative and waste services (2,567); and Accommodation and food service (2,417).

- Manufacturing lost 6,700 jobs, or -18%, of its base during the period.

- Other industries that had net losses were: Finance and insurance (-1,070); Agriculture, forestry, fishing and hunting (-527); and Transportation and warehousing (-399).

Table 3: Industry Employment Change – Pee Dee/Regional Partnership – 2002 to 2008

NAICS Code	Description	2002 Jobs	2008 Jobs	Change	% Change
11	Agriculture, forestry, fishing and hunting	6,567	5,723	(844)	(13%)
21	Mining	512	501	(11)	(2%)
22	Utilities	712	663	(49)	(7%)
23	Construction	17,203	20,030	2,827	16%
31-33	Manufacturing	49,505	39,405	(10,100)	(20%)
42	Wholesale trade	7,388	7,438	50	1%
44-45	Retail trade	30,136	31,419	1,283	4%
48-49	Transportation and warehousing	6,166	5,701	(465)	(8%)
51	Information	2,648	2,803	155	6%
52	Finance and insurance	8,614	7,757	(857)	(10%)
53	Real estate and rental and leasing	7,106	9,531	2,425	34%
54	Professional and technical services	11,187	13,603	2,416	22%
55	Management of companies and enterprises	3,796	3,732	(64)	(2%)
56	Administrative and waste services	12,073	15,545	3,472	29%
61	Educational services	3,704	5,212	1,508	41%
62	Health care and social assistance	25,314	31,217	5,903	23%
71	Arts, entertainment, and recreation	5,185	5,672	487	9%
72	Accommodation and food services	18,416	21,136	2,720	15%
81	Other services, except public administration	13,160	14,453	1,293	10%
90	Government (Includes Public Education)	53,525	57,977	4,452	8%
	Total All Industries	282,917	299,518	16,601	6%

Table 4: Industry Employment Change – Pee Dee Region – 2002 to 2008

NAICS Code	Description	2002 Jobs	2008 Jobs	Change	% Change
11	Agriculture, forestry, fishing and hunting	2,486	2,169	(317)	(13%)
21	Mining	221	255	34	15%
22	Utilities	276	243	(33)	(12%)
23	Construction	5,067	5,261	194	4%
31-33	Manufacturing	12,689	9,311	(3,378)	(27%)
42	Wholesale trade	1,146	1,311	165	14%
44-45	Retail trade	8,459	8,389	(70)	(1%)
48-49	Transportation and warehousing	1,753	1,687	(66)	(4%)
51	Information	604	619	15	2%
52	Finance and insurance	1,818	2,031	213	12%
53	Real estate and rental and leasing	1,955	2,747	792	41%
54	Professional and technical services	2,377	3,416	1,039	44%
55	Management of companies and enterprises	277	501	224	81%
56	Administrative and waste services	2,366	3,271	905	38%
61	Educational services	587	632	45	8%
62	Health care and social assistance	10,211	11,611	1,400	14%
71	Arts, entertainment, and recreation	2,084	2,106	22	1%
72	Accommodation and food services	5,596	5,899	303	5%
81	Other services, except public administration	3,286	3,815	529	16%
90	Government (Includes Puublic Education)	9,653	10,086	433	4%
	Total All Industries	72,911	75,360	2,449	3%

Source: Economic Modeling Specialists, Inc., EMSI

TABLE 5: INDUSTRY EMPLOYMENT CHANGE – REGIONAL PARTNERSHIP – 2002 TO 2008

NAICS Code	Description	2002 Jobs	2008 Jobs	Change	% Change
11	Agriculture, forestry, fishing and hunting	4,081	3,554	(527)	(13%)
21	Mining	292	246	(46)	(16%)
22	Utilities	436	420	(16)	(4%)
23	Construction	12,136	14,769	2,633	22%
31-33	Manufacturing	36,816	30,093	(6,723)	(18%)
42	Wholesale trade	6,242	6,127	(115)	(2%)
44-45	Retail trade	21,677	23,029	1,352	6%
48-49	Transportation and warehousing	4,413	4,014	(399)	(9%)
51	Information	2,044	2,184	140	7%
52	Finance and insurance	6,796	5,726	(1,070)	(16%)
53	Real estate and rental and leasing	5,151	6,784	1,633	32%
54	Professional and technical services	8,810	10,187	1,377	16%
55	Management of companies and enterprises	3,519	3,231	(288)	(8%)
56	Administrative and waste services	9,708	12,275	2,567	26%
61	Educational services	3,118	4,580	1,462	47%
62	Health care and social assistance	15,104	19,606	4,502	30%
71	Arts, entertainment, and recreation	3,101	3,566	465	15%
72	Accommodation and food services	12,820	15,237	2,417	19%
81	Other services, except public administration	9,874	10,638	764	8%
90	Government (Includes Public Education)	43,872	47,891	4,019	9%
	Total All Industries	210,010	224,157	14,147	7%

Source: Economic Modeling Specialists, Inc., EMSI

PROJECTED INDUSTRY GROWTH SUMMARY

- Overall, the Pee Dee/Regional Partnership is expected to grow by 10% between 2008 and 2018, adding nearly 30,500 jobs.

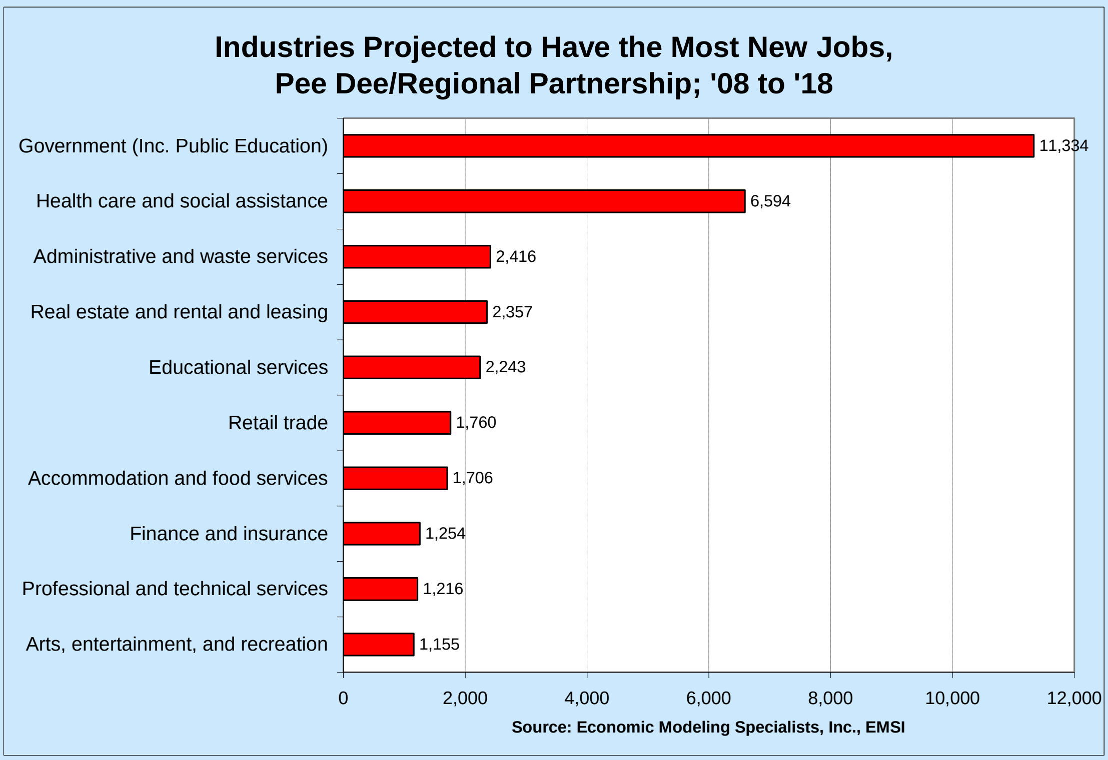
- Most of the growth will be centered in ten industry sectors. These ten industries led by Government and Health care and social assistance, will account for nearly all new jobs. None of these are goods-producing sector.

- Job losses are projected for Manufacturing, Construction and Agriculture, forestry, fishing and hunting.

PROJECTED INDUSTRY GROWTH: WHAT DOES IT MEAN FOR PEE DEE/REGIONAL PARTNERSHIP?

Compared to other areas, the distribution of employment shows that Manufacturing remains a significant part of the region's economy. However, in recent years Manufacturing has decreased in employment. While the region has a strong production based economy, it has been shifting to a service based economy. Dislocated workers from production industries must prepare to find employment in the growing service economy. The growth in all the major service industries has created demand for a variety of new jobs. This requires new skills, new knowledge and the ability to adapt to a new work environment. Preparing the current workforce, employed or unemployed, to succeed in a knowledge and skill driven economy, and creating a workforce that can adapt to the changing job market will be key in creating a competitive advantage for the region.

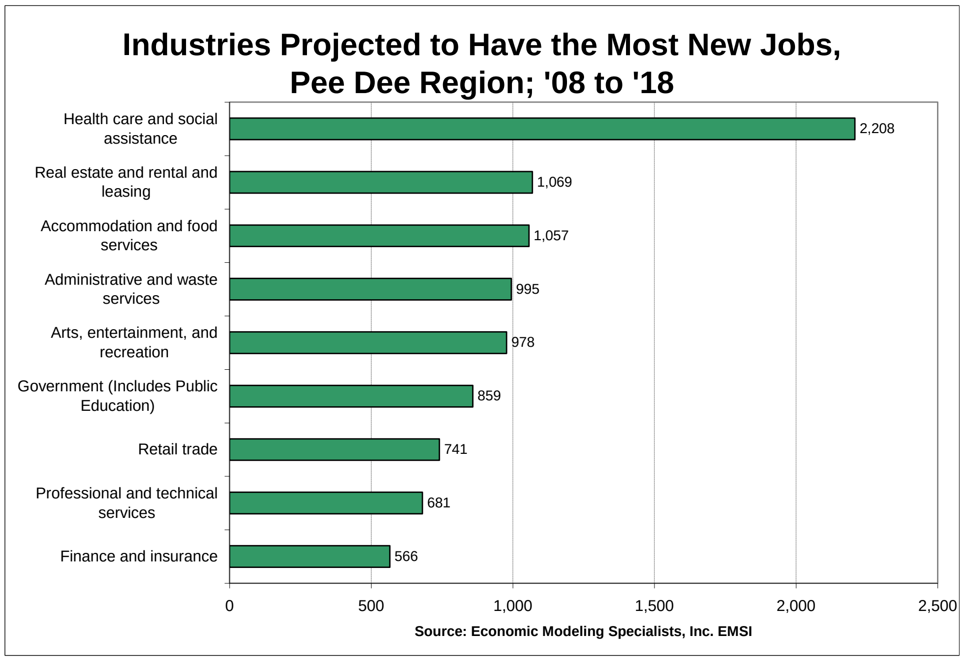
CHART 37: INDUSTRY PROJECTIONS, PEE DEE/REGIONAL PARTNERSHIP, '08 TO '18



PEE DEE REGION

- Overall, the Pee Dee is expected to grow by 11% between 2008 and 2018, adding nearly 8,400 jobs.
- Nearly one-fourth of the growth will be in the Health care and social service sector. With an expected net gain of 2,200 jobs.
- Like other areas, Manufacturing is projected to continue to decline – by 1,400 jobs or -15%.

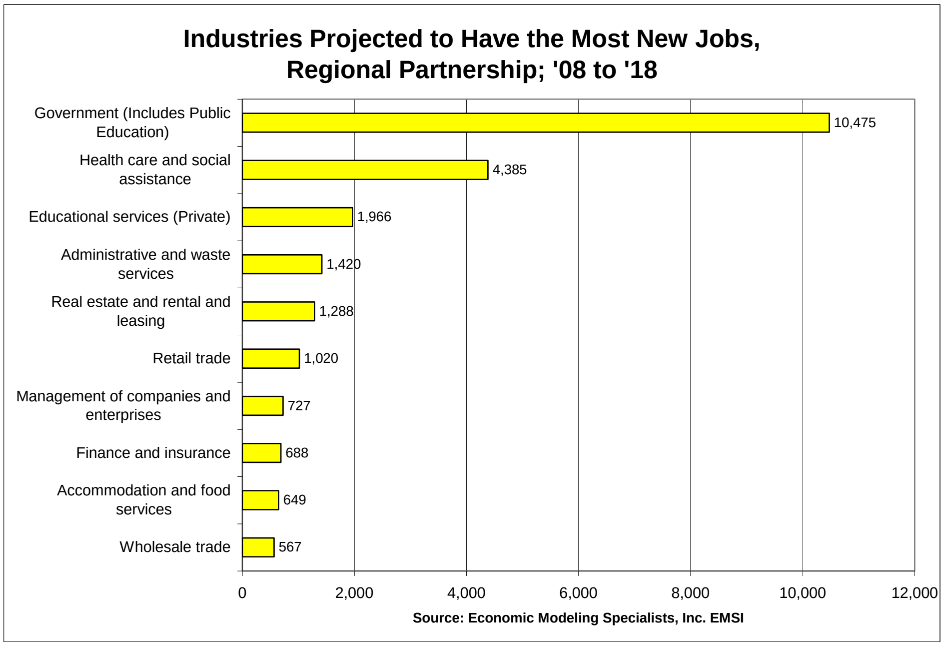
CHART 38: INDUSTRY PROJECTIONS, PEE DEE, ’08 TO ‘18



REGIONAL PARTNERSHIP

- The Regional Partnership is projected to grow by 10% between 2008 and 2018, adding nearly 22,100 jobs.
- A very large portion of the gain is expected for Government (inc. Public Ed.), 10,500; and Health care and social assistance, 4,400 jobs.
- Other areas of substantial growth are expected for Education services (private schools) with nearly 2,000 jobs and also Administrative and waste services with 1,400 jobs.
- Manufacturing is projected to continue to decline – by 1,900 jobs or -6%.

Chart 39: Industry Projections, Regional Partnership, '08 to '18



Industry Modeling

Bringing the industry data together from historical growth, current employment, wages, projected employment growth and Location Quotient allows the data to be analyzed to determine which industries will have the largest economic impact in the region. The industry modeling list includes a total of twenty-five three digit private sector industries (for each area). The Cluster based strategies can be the means by which the strategies and resources of economic development, workforce development and education come together in a systematic approach.

Industry Modeling Summary

Pee Dee/Regional Partnership

- The goods-producing industries did relatively well with six industries represented in the top twenty five. Despite some declines in the past, some segments of manufacturing and construction still play an important role in the regional economy and provide jobs that pay above average.

- Ambulatory Health Care Services was the top three-digit NAICS industry. This industry scored well in all categories.

- Hospitals were second in the modeling list with better than average scores in all measurements. Average annual wage in this industry was an above average $47,975.

Pee Dee Region

- The Pee Dee Region also had six industries from the goods-producing sector represented. Despite some declines in jobs (or slow growth) these industries are still very important and will need new workers to replace some individuals who retire or move to other fields.

- Health care industries led the list representing three of the first five industries on the list.

- Hospitals were the top three-digit industry. This industry scored well in all categories. This is the third largest industry in the region.

- Professional and technical services was second in the modeling list with better than average scores in most measurements (especially past growth and employment size). Average annual wage in this industry was an above average of $42,923.

- Ambulatory health care services were third on the list. Average wages are very high at $63,424.

Regional Partnership

- The Pee Dee Region's diverse list of top ranked industries – several were from health care, services, retail, accommodations, construction and manufacturing.

- Ambulatory health care services were at the top three-digit industry. This industry is quite large, has high wages and has enjoyed rapid growth.

- The next four industries on the list included: Educational Services (private); Securities, commodity contracts and investments; Management of companies; and Nursing and residential care facilities.

Table 6, Pee Dee/Regional Partnership (3-digit NAICS Industry) - Industry Modeling Rank*

Rank	Description	02 to '08 Growth	Growth Ranking	2008 Jobs	Jobs Ranking	Avg. Annual Wage	Wage Ranking	% Projected Change '08 to '18	% Projected Change '08 to '18 Rank	Location Quotient State	LQ Ranking	Average Ranking
1	Ambulatory health care services	22.2%	19	11,438	5	$55,007	16	19.5%	19	1.01	29	17.6
2	Hospitals	7.3%	37	6,046	10	$47,975	23	27.8%	8	1.01	31	21.8
3	Securities, commodity contracts, investments	56.7%	6	1,912	44	$76,114	6	43.8%	2	0.74	62	24.0
4	Educational services	40.7%	8	5,212	11	$34,582	53	43.0%	3	0.89	47	24.4
5	Nursing and residential care facilities	19.2%	23	7,602	7	$26,944	62	23.4%	14	1.31	21	25.4
6	Paper manufacturing	32.9%	11	2,024	42	$48,781	21	0.4%	57	1.95	7	27.6
7	Social assistance	55.4%	7	6,131	9	$19,803	75	14.6%	24	1.01	30	29.0
8	Management of companies and enterprises	-1.7%	53	3,732	21	$88,567	5	23.9%	13	0.86	53	29.0
9	Professional and technical services	21.6%	21	13,603	4	$43,623	34	8.9%	35	0.82	55	29.8
10	Private households	29.6%	12	2,773	29	$10,825	86	30.3%	6	1.28	22	31.0
11	Waste management and remediation services	21.8%	20	481	68	$47,277	26	37.2%	5	0.95	39	31.6
12	Real estate	40.0%	9	8,683	6	$18,289	77	24.6%	12	0.79	59	32.6
13	Administrative and support services	29.0%	13	15,065	2	$21,086	73	14.8%	23	0.81	56	33.4
14	Heavy and civil engineering construction	16.2%	28	2,362	34	$49,121	20	-1.4%	62	1.04	28	34.4
15	Amusements, gambling, and recreation	5.9%	42	3,507	25	$17,525	78	26.5%	9	1.31	19	34.6
16	Plastics and rubber products manufacturing	-3.2%	56	2,758	30	$47,485	24	1.5%	53	1.45	12	35.0
17	Food services and drinking places	17.6%	26	17,574	1	$15,007	84	9.5%	33	0.98	35	35.8
18	Specialty trade contractors	24.4%	16	13,666	3	$29,280	57	-1.4%	61	0.90	44	36.2
19	Furniture and related product manufacturing	-4.0%	58	7,414	8	$40,372	42	-7.9%	70	2.81	4	36.4
20	General merchandise stores	19.6%	22	5,047	14	$23,220	70	7.8%	40	0.92	42	37.6
21	Publishing industries, except Internet	28.3%	14	1,218	50	$43,822	32	3.8%	49	0.90	45	38.0
22	Fabricated metal product manufacturing	7.0%	38	2,311	35	$50,597	18	-5.1%	67	1.00	33	38.2
23	Merchant wholesalers, durable goods	0.4%	50	3,838	19	$50,492	19	8.8%	36	0.67	68	38.4
24	Funds, trusts, and other financial vehicles	35.7%	10	262	77	$31,948	54	13.0%	28	1.18	24	38.6
25	Food and beverage stores	-5.5%	60	4,927	15	$21,450	72	17.2%	21	1.12	27	39.0
Source: Economic Modeling Specialists, Inc., EMSI												

*Overall Rank based on combined ranking components

Table 7, Pee Dee Region (3-digit NAICS Industry) - Industry Modeling Rank*

Rank	Description	2002 to 2008 Growth	Growth Ranking	2008 Jobs	Jobs Ranking	Avg. Annual Wage	Wage Ranking	% Projected Change '08 to '18	% Projected Change '08 to '18 Rank	2008 State LQ	LQ Ranking	Average Ranking
1	Hospitals	6.0%	37	3,440	3	$51,948	11	25.6%	17	2.28	11	15.8
2	Professional and technical services	43.7%	9	3,416	4	$42,923	21	19.9%	20	0.82	45	19.8
3	Ambulatory health care services	6.9%	35	3,578	2	$63,424	6	10.8%	33	1.26	24	20.0
4	Paper manufacturing	16.2%	22	694	28	$42,665	23	15.7%	25	2.65	8	21.2
5	Nursing and residential care facilities	24.9%	15	2,671	7	$24,648	56	26.6%	13	1.83	15	21.2
6	Securities, commodity contracts, investments	27.7%	12	572	36	$38,116	31	60.8%	1	0.89	39	23.8
7	Real estate	48.9%	7	2,564	8	$19,251	65	39.7%	6	0.93	37	24.6
8	Management of companies and enterprises	80.8%	5	501	40	$61,095	7	32.7%	9	0.46	63	24.8
9	Private households	26.4%	13	1,034	21	$11,328	75	33.5%	8	1.89	14	26.2
10	Amusements, gambling, and recreation	-2.9%	50	1,643	11	$20,809	62	51.5%	3	2.44	10	27.2
11	Administrative and support services	44.6%	8	3,182	6	$20,141	64	29.9%	10	0.68	51	27.8
12	Social assistance	29.7%	10	1,922	10	$18,049	68	12.0%	32	1.26	23	28.6
13	Machinery manufacturing	11.8%	29	597	34	$48,365	14	2.5%	45	1.26	22	28.8
14	Wood product manufacturing	-1.0%	48	1,149	19	$46,996	16	-11.1%	59	3.44	5	29.4
15	Construction of buildings	10.8%	30	1,349	15	$45,577	19	-13.6%	63	1.16	25	30.4
16	Couriers and messengers	325.7%	1	212	58	$31,354	43	52.4%	2	0.73	48	30.4
17	Mining, except oil and gas	21.7%	17	207	59	$57,736	8	-15.0%	65	3.67	4	30.6
18	Specialty trade contractors	25.9%	14	3,272	5	$26,444	50	-0.2%	48	0.86	41	31.6
19	Miscellaneous store retailers	12.3%	26	821	24	$13,930	73	25.8%	16	1.30	20	31.8
20	Food services and drinking places	15.7%	23	3,773	1	$14,516	72	24.0%	19	0.84	44	31.8
21	Credit intermediation and related activities	4.5%	39	806	25	$46,614	17	17.1%	24	0.64	56	32.2
22	Health and personal care stores	18.3%	21	582	35	$32,867	41	8.9%	36	1.10	30	32.6
23	Accommodation	-8.9%	59	2,126	9	$25,515	54	7.2%	40	3.34	6	33.6
24	Gasoline stations	8.4%	32	636	32	$26,903	49	8.3%	37	1.53	18	33.6
25	Repair and maintenance	24.1%	16	937	23	$26,348	51	6.5%	42	0.94	36	33.6

Source: Economic Modeling Specialists, Inc., EMSI

*Overall Rank based on combined ranking components

TABLE 8, REGIONAL PARTNERSHIP (3-DIGIT NAICS INDUSTRY) - INDUSTRY MODELING RANK*

Rank	Description	2002 to 2008 Growth	Growth Ranking	2008 Jobs	Jobs Ranking	Avg. Annual Wage	Wage Ranking	% Projected Change '08 to '18	% Projected Change '08 to '18 Rank	Location Quotient State	LQ Ranking	Average Ranking
1	Ambulatory health care services	30.7%	15	7,859	5	$51,187	20	23.6%	11	0.93	35	17.2
2	Educational services	46.9%	9	4,580	9	$34,608	49	42.9%	3	1.04	22	18.4
3	Securities, commodity contracts, investments	73.6%	6	1,340	42	$94,406	3	36.4%	4	0.70	60	23.0
4	Management of companies and enterprises	-8.2%	60	3,231	17	$93,176	4	22.5%	13	0.99	27	24.2
5	Nursing and residential care facilities	16.4%	29	4,931	8	$28,217	58	21.7%	14	1.13	17	25.2
6	Waste management and remediation services	70.8%	8	393	64	$46,066	27	34.4%	5	1.03	24	25.6
7	Fabricated metal product manufacturing	38.8%	11	2,112	28	$51,303	19	-3.5%	63	1.22	14	27.0
8	Heavy and civil engineering construction	120.1%	2	1,721	35	$49,493	23	-0.5%	57	1.01	26	28.6
9	Paper manufacturing	43.8%	10	1,330	43	$52,065	17	-7.6%	67	1.71	7	28.8
10	Social assistance	70.9%	7	4,210	10	$20,613	69	15.7%	22	0.93	36	28.8
11	Furniture and related product manufacturing	5.5%	42	6,338	6	$42,015	36	-1.2%	59	3.21	2	29.0
12	Professional and technical services	15.6%	31	10,187	4	$43,877	30	5.3%	40	0.82	44	29.8
13	Plastics and rubber products manufacturing	0.2%	51	2,355	24	$50,168	21	2.8%	49	1.66	9	30.8
14	Private households	31.5%	14	1,739	34	$10,522	82	28.4%	8	1.07	21	31.8
15	Administrative and support services	25.4%	20	11,882	2	$21,394	68	10.8%	26	0.85	43	31.8
16	Merchant wholesalers, durable goods	0.4%	50	3,270	16	$51,560	18	9.9%	28	0.76	51	32.6
17	Food and beverage stores	1.9%	47	3,701	13	$22,232	66	16.4%	20	1.12	19	33.0
18	Real estate	36.6%	12	6,119	7	$17,827	74	18.2%	17	0.75	55	33.0
19	Hospitals	9.0%	38	2,607	23	$42,713	35	30.7%	6	0.58	65	33.4
20	Food services and drinking places	18.2%	27	13,801	1	$15,165	77	5.5%	39	1.03	25	33.8
21	General merchandise stores	28.7%	16	3,516	15	$23,601	63	7.5%	34	0.85	42	34.0
22	Electrical equipment and appliance mfg.	-22.4%	69	2,013	31	$63,451	12	1.2%	54	1.90	5	34.2
23	Publishing industries, except Internet	28.1%	17	972	46	$45,427	28	1.1%	55	0.96	29	35.0
24	Specialty trade contractors	23.9%	21	10,394	3	$30,188	54	-1.8%	61	0.92	38	35.4
25	Nonstore retailers	19.0%	25	2,900	19	$18,646	72	-0.4%	56	1.43	12	36.8
Source: Economic Modeling Specialists, Inc., EMSI												

*Overall Rank based on combined ranking components

Workforce Demand Assessment: Occupations

The data provided in this section addresses the occupational distribution of the current Pee Dee/Regional Partnership economy. Top jobs are identified in terms of employment and wages, the number projected in the future economy and what skills will be needed to succeed in those jobs.

Distribution of Occupations (major SOC Category)

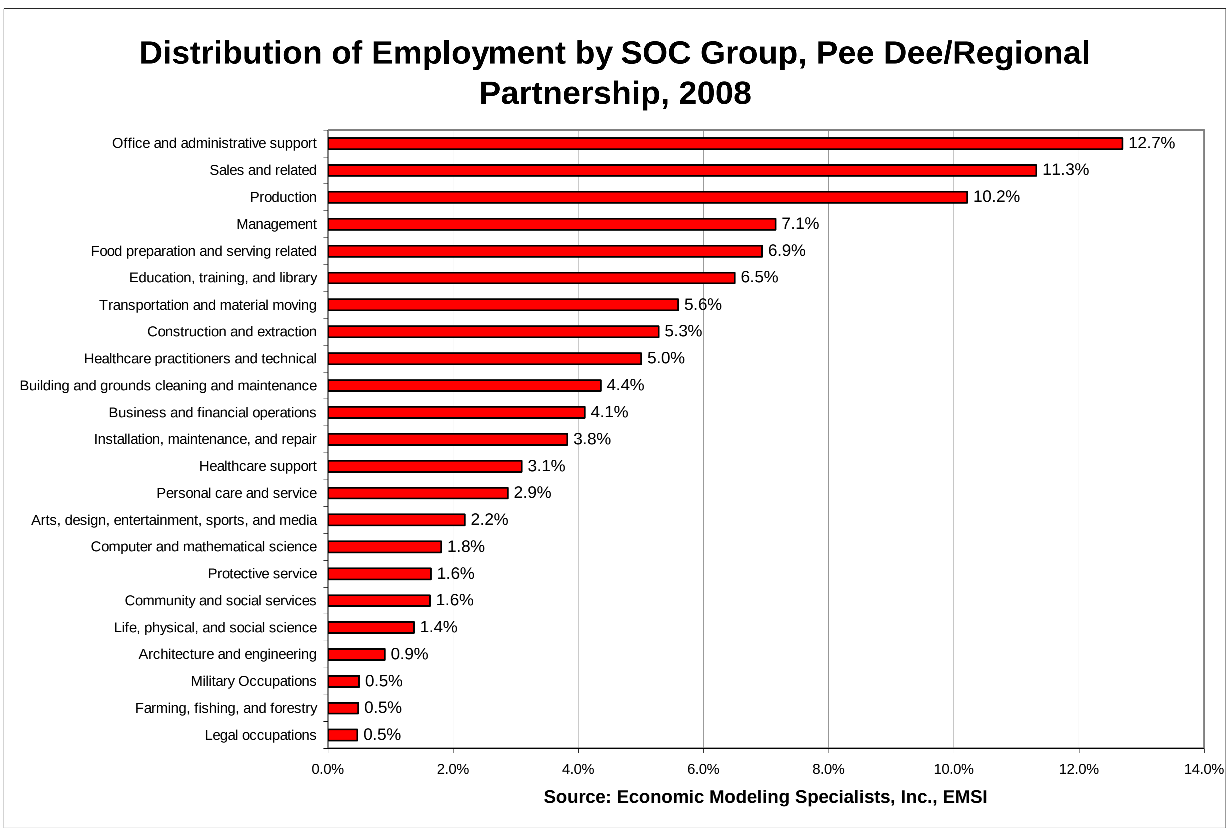
Pee Dee/Regional Partnership

The top three categories each represented 34.2% of total jobs in 2008. The occupational groups were: Office and administrative support, Sales and related and Production.

Management represents a sizeable portion, 7.1% of the region's jobs.

Rounding out the top groups are: Food preparation and serving (6.9%); Education, training and library (6.5%); and Transportation and material moving (5.6%).

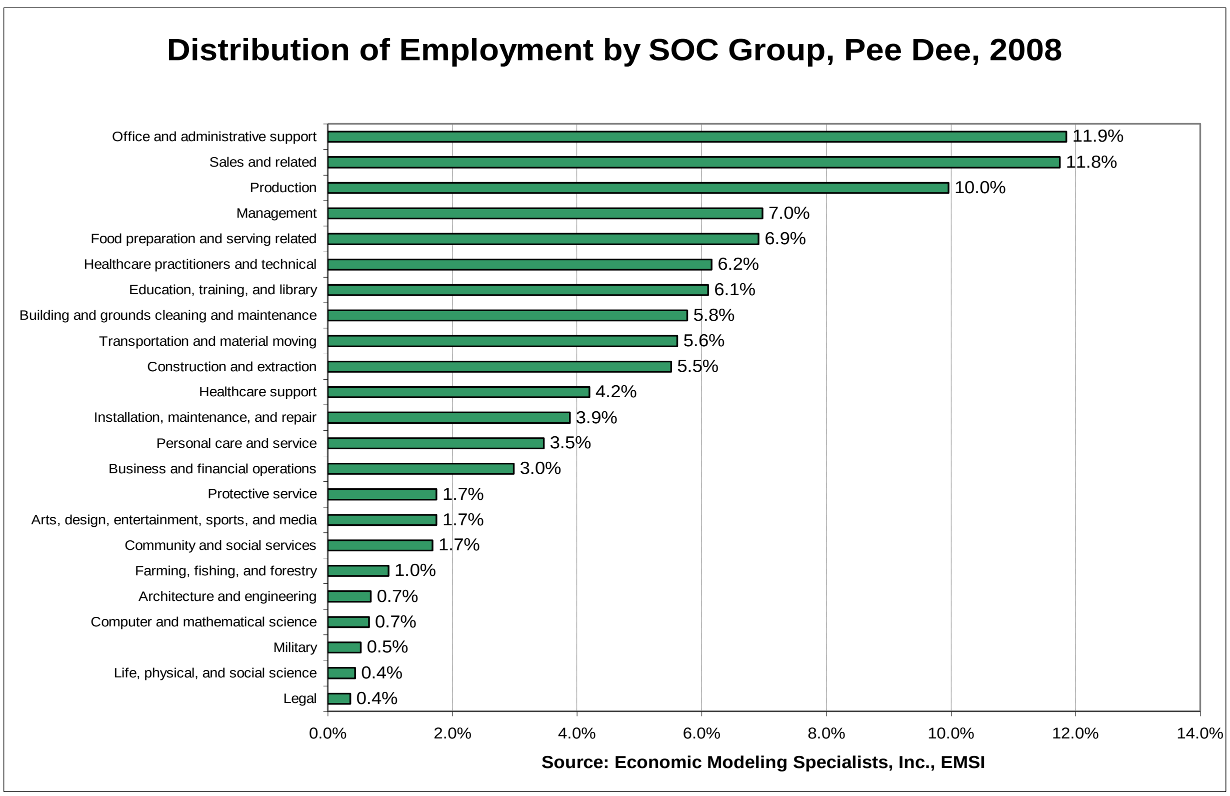
Chart 40: Distribution of Employment by Major Occupational Groups, Pee Dee/Regional Partnership, 2008



Pee Dee Region

- The top three categories each represented 33.7% of total jobs in 2008. The occupational groups were: Office and administrative support, Sales and related and Production.
- Next were Management occupations representing 7.0% of the region's jobs.
- Rounding out the top groups are: Food preparation and serving (6.9%); Healthcare practitioners and technical (6.2%); and Education, training and library (6.1%).

Chart 41: Distribution of Employment by Major Occupational Groups, Pee Dee Region, 2008



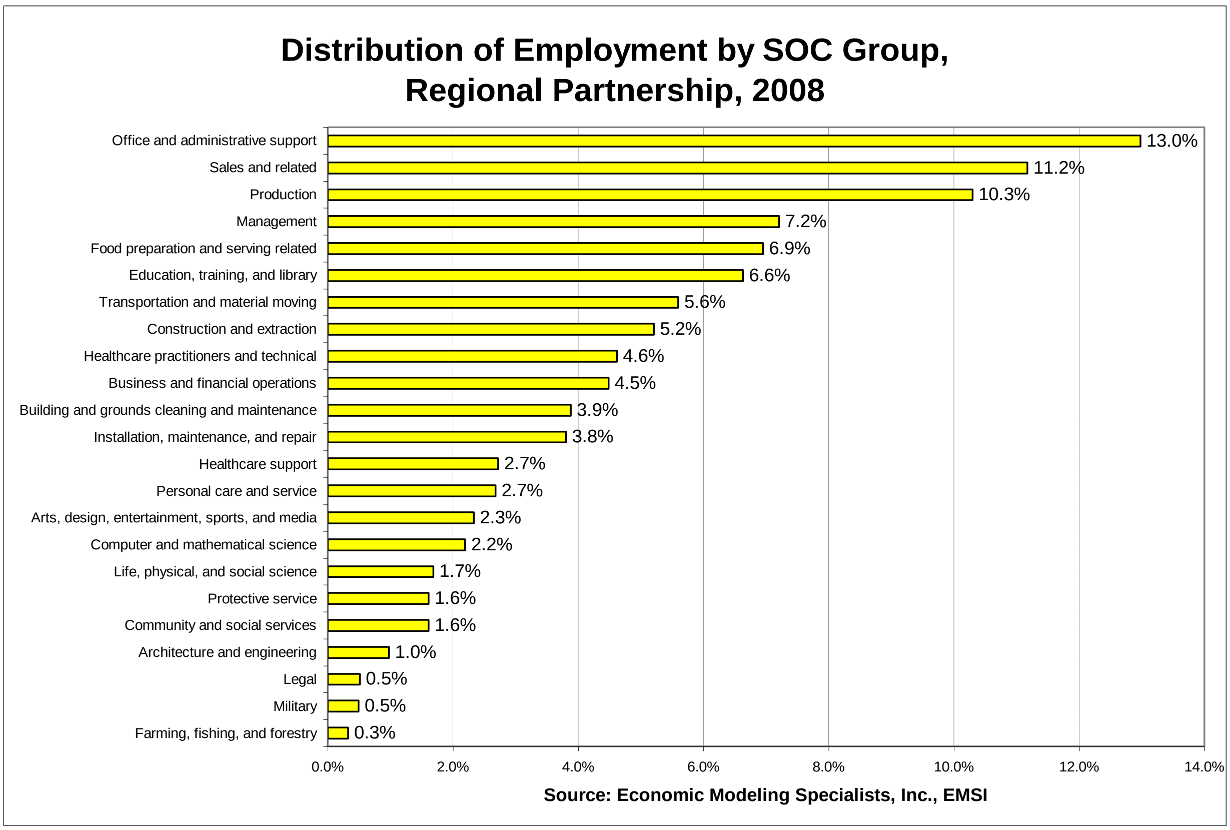
Regional Partnership

- The top three categories each represented 34.5% of total jobs in 2008. The occupational groups were: Office and administrative support, Sales and related and Production.

- Management occupations were next representing 7.2% of the region's jobs.

- Rounding out the top groups are: Food preparation and serving (6.9%); Education, training and library (6.6%); and Transportation and material moving (5.6%).

Chart 42: Distribution of Employment by Major Occupational Groups, Regional Partnership, 2008



The next three lists/tables show the largest specific occupations in each of the areas. Most of the largest occupations have very low pay and generally require short-term training. This is typical of most areas. However there are several occupations requiring more training and education (healthcare field).

Table 9: Top 20 Detailed Occupations by Total Employment – Pee Dee/Regional Partnership

Description	2008 Jobs	Avg. Annual Wage	Education Level
Retail salespersons	7,659	$21,216	Short-term on-the-job training
Cashiers, except gaming	6,243	$16,890	Short-term on-the-job training
Combined food preparation and serving workers, inc. fast food	5,903	$16,307	Short-term on-the-job training
Registered nurses	5,051	$55,245	Associate's degree
Postsecondary teachers	4,812	$90,230	Doctoral degree
Home health aides	4,668	$20,987	Short-term on-the-job training
First-line supervisors/managers of retail sales workers	4,662	$30,181	Work experience in a related field
Waiters and waitresses	4,593	$17,493	Short-term on-the-job training
Team assemblers	4,420	$22,006	Moderate-term on-the-job training
Office clerks, general	4,354	$23,504	Short-term on-the-job training
Maids and housekeeping cleaners	4,305	$15,475	Short-term on-the-job training
Executive secretaries and administrative assistants	3,816	$31,616	Moderate-term on-the-job training
Secretaries, except legal, medical, and executive	3,725	$25,854	Moderate-term on-the-job training
Bookkeeping, accounting, and auditing clerks	3,669	$26,395	Moderate-term on-the-job training
Laborers and freight, stock, and material movers, hand	3,657	$20,363	Short-term on-the-job training
Janitors and cleaners, except maids	3,520	$20,238	Short-term on-the-job training
Customer service representatives	3,447	$25,626	Moderate-term on-the-job training
General and operations managers	3,267	$88,837	Degree plus work experience
Maintenance and repair workers, general	2,970	$29,682	Moderate-term on-the-job training
Stock clerks and order fillers	2,841	$19,490	Short-term on-the-job training

Source: Economic Modeling Specialists, Inc., EMSI

Table 10: Top 20 Detailed Occupations by Total Employment – Pee Dee Region

Occupation	2008 Jobs	Avg. Annual Wage	Education Level
Retail salespersons	2,026	$21,632	Short-term on-the-job training
Maids and housekeeping cleaners	1,860	$16,349	Short-term on-the-job training
Home health aides	1,715	$19,822	Short-term on-the-job training
Cashiers, except gaming	1,625	$16,328	Short-term on-the-job training
Registered nurses	1,595	$64,293	Associate's degree
Combined food preparation and serving workers, inc. fast food	1,390	$16,162	Short-term on-the-job training
First-line supervisors/managers of retail sales workers	1,287	$29,806	Work experience in a related field
Waiters and waitresses	1,229	$18,928	Short-term on-the-job training
Secretaries, except legal, medical, and executive	1,034	$25,584	Moderate-term on-the-job training
Office clerks, general	986	$22,651	Short-term on-the-job training
Laborers and freight, stock, and material movers, hand	925	$21,507	Short-term on-the-job training
Bookkeeping, accounting, and auditing clerks	900	$26,749	Moderate-term on-the-job training
Teacher assistants	851	$25,210	Short-term on-the-job training
Janitors and cleaners, except maids	826	$19,032	Short-term on-the-job training
Child care workers	792	$15,350	Short-term on-the-job training
Elementary school teachers, except special education	779	$51,563	Bachelor's degree
Maintenance and repair workers, general	768	$28,850	Moderate-term on-the-job training
Carpenters	728	$28,080	Long-term on-the-job training
Stock clerks and order fillers	686	$19,885	Short-term on-the-job training
General and operations managers	683	$81,370	Degree plus work experience

Source: Economic Modeling Specialists, Inc., EMSI

Table 11: Top 20 Detailed Occupations by Total Employment – Regional Partnership

Occupation	2008 Jobs	Avg. Annual Wage	Education Level
Retail salespersons	5,633	$21,070	Short-term on-the-job training
Cashiers, except gaming	4,617	$17,098	Short-term on-the-job training
Combined food preparation and serving workers, inc. fast food	4,513	$16,349	Short-term on-the-job training
Postsecondary teachers	4,258	$93,392	Doctoral degree
Team assemblers	3,806	$22,173	Moderate-term on-the-job training
Registered nurses	3,456	$51,064	Associate's degree
First-line supervisors/managers of retail sales workers	3,375	$30,326	Work experience in a related field
Office clerks, general	3,368	$23,754	Short-term on-the-job training
Waiters and waitresses	3,364	$16,869	Short-term on-the-job training
Executive secretaries and administrative assistants	3,307	$31,782	Moderate-term on-the-job training
Home health aides	2,953	$21,653	Short-term on-the-job training
Customer service representatives	2,885	$25,626	Moderate-term on-the-job training
Bookkeeping, accounting, and auditing clerks	2,770	$26,291	Moderate-term on-the-job training
Laborers and freight, stock, and material movers, hand	2,732	$19,968	Short-term on-the-job training
Janitors and cleaners, except maids	2,694	$20,613	Short-term on-the-job training
Secretaries, except legal, medical, and executive	2,691	$25,958	Moderate-term on-the-job training
General and operations managers	2,584	$90,875	Degree plus work experience
Maids and housekeeping cleaners	2,445	$14,789	Short-term on-the-job training
Maintenance and repair workers, general	2,202	$29,973	Moderate-term on-the-job training
Stock clerks and order fillers	2,155	$19,344	Short-term on-the-job training

Source:Economic Modeling Specialists, Inc., EMSI

Top Occupations by Total Wage

Traditional views of top occupations look only at employment; given that the economy is like a pyramid, many low-skilled, low-wage jobs dominate such a list such as cashiers, security guards, waiters and waitresses, etc. In order to identify a more appropriate list across a range of occupational levels and opportunities, we analyzed the region's occupations sorted by total wage. Total wage allows us to use the wage as a proxy for skill and weigh it to the employment pattern of the region. We can then analyze the list to determine the overall "quality" of the labor market opportunities in the region.

- All of the top wage occupations require extensive training and education.
- A large portion of the occupations are in the fast-growing medical field.
- Another large segment of these are in management occupations.
- Numerous jobs are in the education field (i.e. postsecondary teachers).

The following tables list twenty occupations with the highest wages for each area.

Table 12: Top 20 Occupations by Total Wages – Pee Dee/Regional Partnership (With 50 or more jobs)

Occupation	2008 Jobs	Avg. Annual Wage	Education Level
Dentists, general	213	$168,418	First professional degree
Airline pilots, copilots, and flight engineers	96	$114,878	Bachelor's degree
Physicians and surgeons	1,604	$112,632	First professional degree
Optometrists	80	$99,050	First professional degree
Pharmacists	498	$97,115	First professional degree
Postsecondary teachers	4,812	$90,230	Doctoral degree
General and operations managers	3,267	$88,837	Degree plus work experience
Natural sciences managers	173	$84,261	Degree plus work experience
Education administrators, elementary & secondary school	527	$83,221	Degree plus work experience
Physician assistants	186	$80,288	Bachelor's degree
Computer and information systems managers	625	$79,976	Degree plus work experience
Medical and health services managers	528	$79,290	Degree plus work experience
Engineering managers	232	$78,478	Degree plus work experience
Public relations managers	90	$76,107	Degree plus work experience
Training and development managers	67	$75,629	Degree plus work experience
Environmental engineers	104	$73,944	Bachelor's degree
Lawyers	775	$73,278	First professional degree
Compensation and benefits managers	89	$72,634	Degree plus work experience
Judges, magistrate judges, and magistrates	86	$71,947	Degree plus work experience
Financial examiners	59	$71,469	Bachelor's degree

Source: Economic Modeling Specialists, Inc., EMSI

Table 13: Top 20 Occupations by Total Wages – Pee Dee Region (With 50 or more jobs)

Occupation	2008 Jobs	Avg. Annual Wage	Education Level
Dentists, general	55	$179,878	First professional degree
Physicians and surgeons	367	$176,675	First professional degree
Pharmacists	132	$130,166	First professional degree
Physician assistants	65	$103,355	Bachelor's degree
Medical and health services managers	170	$81,682	Degree plus work experience
General and operations managers	683	$81,370	Degree plus work experience
Sales managers	125	$74,506	Degree plus work experience
Education administrators, elementary and secondary school	141	$71,739	Degree plus work experience
Physical therapists	78	$71,656	Master's degree
Registered nurses	1,595	$64,293	Associate's degree
Postsecondary teachers	554	$64,210	Doctoral degree
Computer systems analysts	76	$62,587	Bachelor's degree
Dental hygienists	89	$61,984	Associate's degree
Network and computer systems administrators	61	$61,214	Bachelor's degree
Lawyers	124	$61,110	First professional degree
Computer programmers	67	$58,989	Bachelor's degree
Industrial production managers	84	$58,802	Work experience in a related field
Vocational education teachers, secondary school	92	$57,138	Degree plus work experience
Financial managers	220	$56,576	Degree plus work experience
Education administrators, postsecondary	53	$56,472	Degree plus work experience

Source: Economic Modeling Specialists, Inc., EMSI

Table 14: Top 20 Occupations by Total Wages – Regional Partnership (With 50 or more jobs)

Occupation	2008 Jobs	Avg. Annual Wage	Education Level
Dentists, general	158	$164,445	First professional degree
Airline pilots, copilots, and flight engineers	90	$118,747	Bachelor's degree
Physicians and surgeons	1,237	$93,683	First professional degree
Postsecondary teachers	4,258	$93,392	Doctoral degree
General and operations managers	2,584	$90,875	Degree plus work experience
Optometrists	55	$90,397	First professional degree
Education administrators, elementary & secondary school	386	$87,214	Degree plus work experience
Pharmacists	367	$84,406	First professional degree
Natural sciences managers	169	$84,157	Degree plus work experience
Public relations managers	78	$79,872	Degree plus work experience
Computer and information systems managers	582	$79,269	Degree plus work experience
Medical and health services managers	357	$78,146	Degree plus work experience
Training and development managers	59	$77,750	Degree plus work experience
Lawyers	651	$75,733	First professional degree
Engineering managers	198	$75,421	Degree plus work experience
Compensation and benefits managers	78	$75,192	Degree plus work experience
Environmental engineers	97	$74,859	Bachelor's degree
Financial examiners	52	$74,485	Bachelor's degree
Judges, magistrate judges, and magistrates	73	$73,923	Degree plus work experience
Human resources managers, all other	54	$71,053	Degree plus work experience

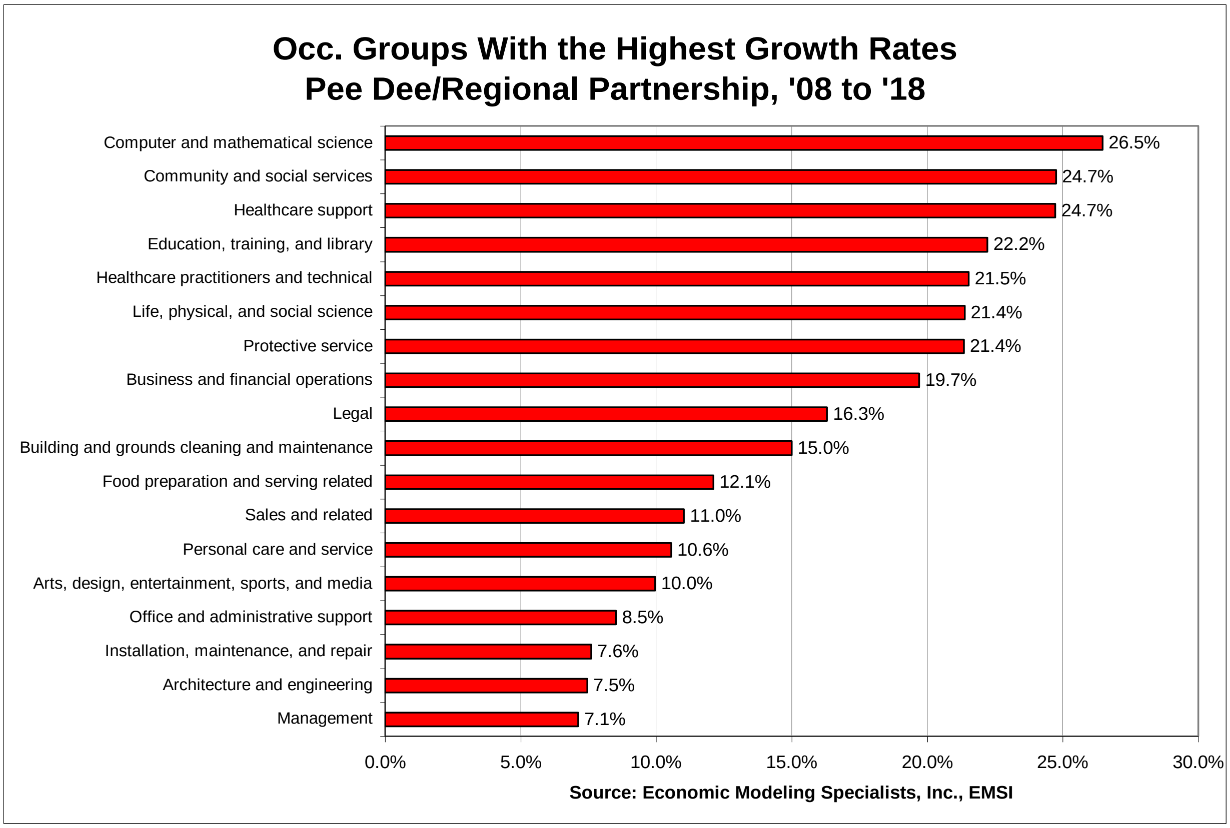
Source: Economic Modeling Specialists, Inc., EMSI

Projected Occupational Growth Summary (2008 to 2018)

Pee Dee/Regional Partnership

- The high-tech field, Computer and Mathematical Science Occupations will grow at a projected rate of 26.5%.
- Next fastest in projected occupational job growth are Community and social service, 24.7%
- Occupations in the health care field are projected to grow extremely fast in the region. Healthcare support is projected to grow by 24.7%; while Health care practitioners and technical occupations are expected to increase by 21.5%
- Education, training and library occupations are expected to grow by 22.2%.
- As expected, Production occupations did not make the top list.

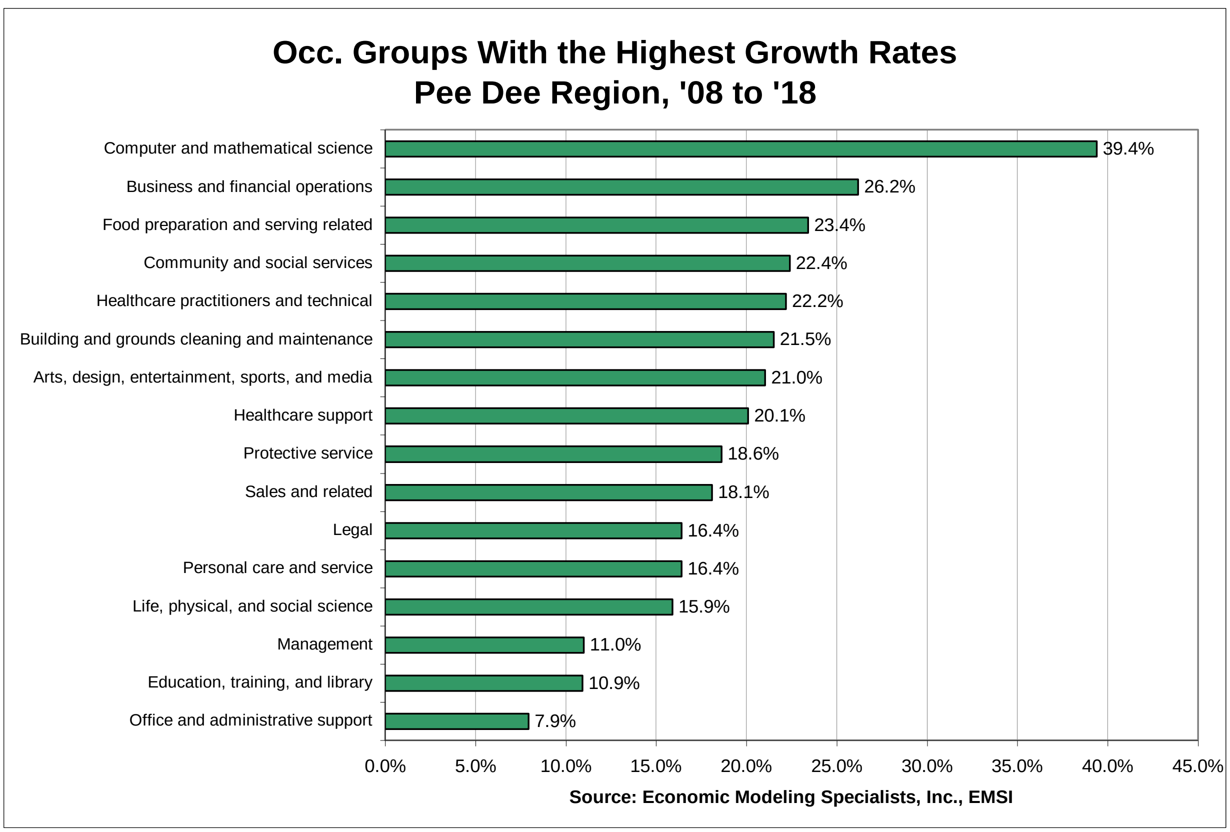
Chart 43: Occupational Groups with Highest Projected Growth, Pee Dee/Regional Partnership, '08 to '18



Pee Dee Region

- By far the fastest growing group is expected to be the Computer and mathematical science occupations which is projected to grow at a projected rate of 39.4%.
- Next fastest in projected occupational job growth are Business and financial operations, 26.2%
- Third, Food preparation and serving jobs are expected to grow at a rate of 23.4%
- Next fastest in projected occupational job growth are Community and social service, 22.4%.
- Health care practitioners and technical occupations are expected to increase by 22.5%.

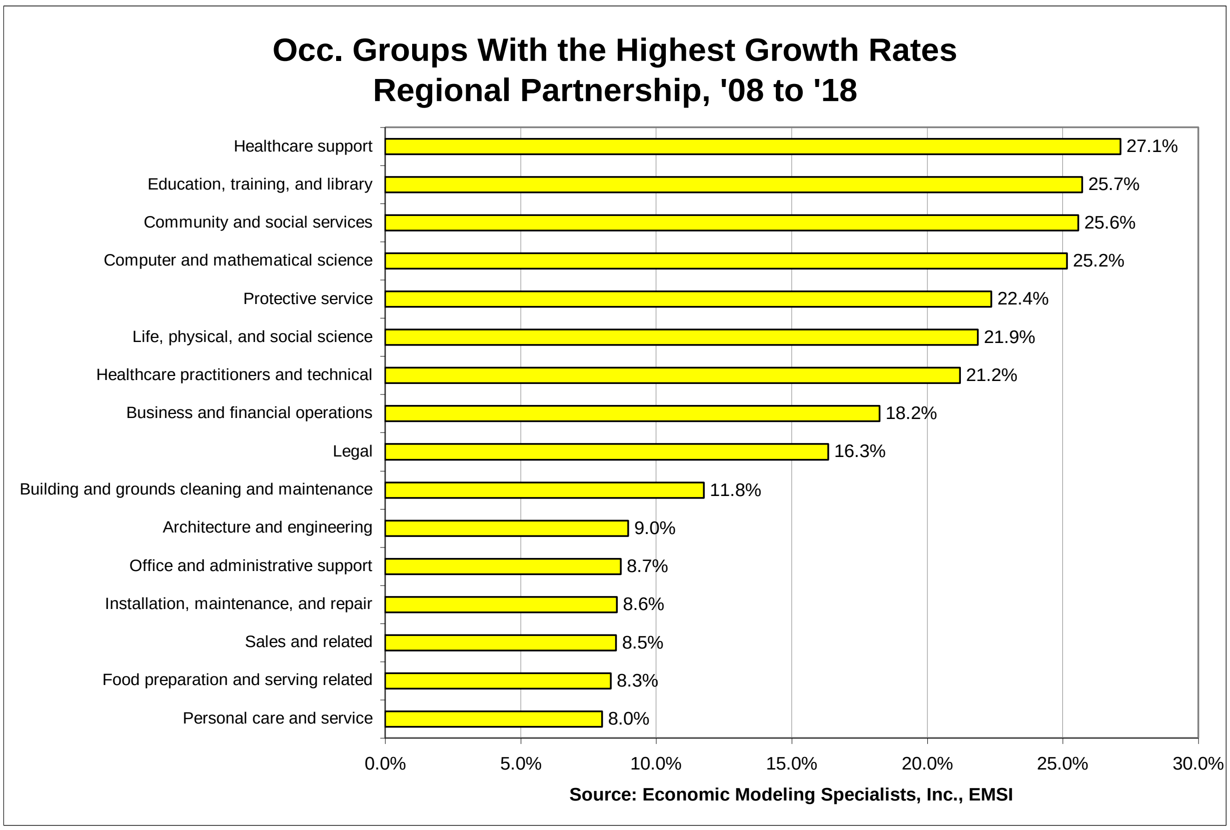
Chart 44: Occupational Groups with the Highest Projected Growth, Pee Dee Region, '08 to '18



Regional Partnership

- In this area, the fastest growing group is expected to be Healthcare support, 27.1%
- Next fastest in projected occupational job growth are Education, training and library, 25.7%
- Third, Community and social services are expected to grow at a rate of 25.6%.
- Next fastest in projected occupational job growth are Computer and mathematical science, 25.2%
- Rounding out the top five, Protective service occupations are expected to increase by 22.4%.

Chart 45: Occupational Groups with the Highest Projected Growth, Regional Partnership, '08 to '18



Occupation Projections (Detailed Occupations)

Pee Dee/Regional Partnership

- Ten of the fastest growing occupations are related to the health care field.
- Twelve of the twenty-five jobs listed will require a bachelor's degree or above.
- Only two will require just short-term on-the-job training. This demonstrates the importance of education and training.

Table 15: Pee Dee/Regional Partnership Top Occupations - Projected Growth Rate (%), '08 to '18

Occupation	2008 Jobs	2018 Jobs	Change '08 to '18	% Change '08 to '18	Education Level
Network systems and data communications analysts	353	530	177	50.1%	Bachelor's degree
Substance abuse and behavioral disorder counselors	94	140	46	48.9%	Master's degree
Mental health and substance abuse social workers	205	300	95	46.3%	Master's degree
Pharmacy technicians	573	821	248	43.3%	Moderate-term on-the-job training
Computer software engineers, applications	690	987	297	43.0%	Bachelor's degree
Self-enrichment education teachers	537	754	217	40.4%	Work experience in a related field
Personal financial advisors	862	1,209	347	40.3%	Bachelor's degree
Mental health counselors	237	332	95	40.1%	Master's degree
Funeral attendants	94	131	37	39.4%	Short-term on-the-job training
Locksmiths and safe repairers	72	100	28	38.9%	Moderate-term on-the-job training
Postsecondary teachers	4,812	6,657	1,845	38.3%	Doctoral degree
Physical therapist assistants	163	225	62	38.0%	Associate's degree
Financial analysts	372	511	139	37.4%	Bachelor's degree
Medical scientists, except epidemiologists	439	602	163	37.1%	Doctoral degree
Biological technicians	379	516	137	36.1%	Associate's degree
Securities, commodities, and financial services sales agents	531	722	191	36.0%	Bachelor's degree
Personal and home care aides	1,264	1,708	444	35.1%	Short-term on-the-job training
Medical assistants	607	819	212	34.9%	Moderate-term on-the-job training
Veterinary technologists and technicians	135	182	47	34.8%	Associate's degree
Instructional coordinators	273	368	95	34.8%	Master's degree
Dental hygienists	292	391	99	33.9%	Associate's degree
Dental assistants	450	602	152	33.8%	Moderate-term on-the-job training
Aircraft mechanics and service technicians	83	111	28	33.7%	Postsecondary vocational award
Computer systems analysts	1,125	1,502	377	33.5%	Bachelor's degree
Private detectives and investigators	82	109	27	32.9%	Work experience in a related field

Source: Economic Modeling Specialists, Inc., EMSI

The next table lists the top twenty-five occupations with the largest projected net job growth for Pee Dee/Regional Partnership. These occupations will account for much of the net job growth and provide ample opportunities to a wide range of residents. Ten of these will require only on-the-job training. However, the need for workers with good solid basic skills will be a must. Seven of the occupations will require a bachelor's degree or above.

Table 16: Pee Dee/Regional Partnership Top Occupations - Total Growth, '08 to '18

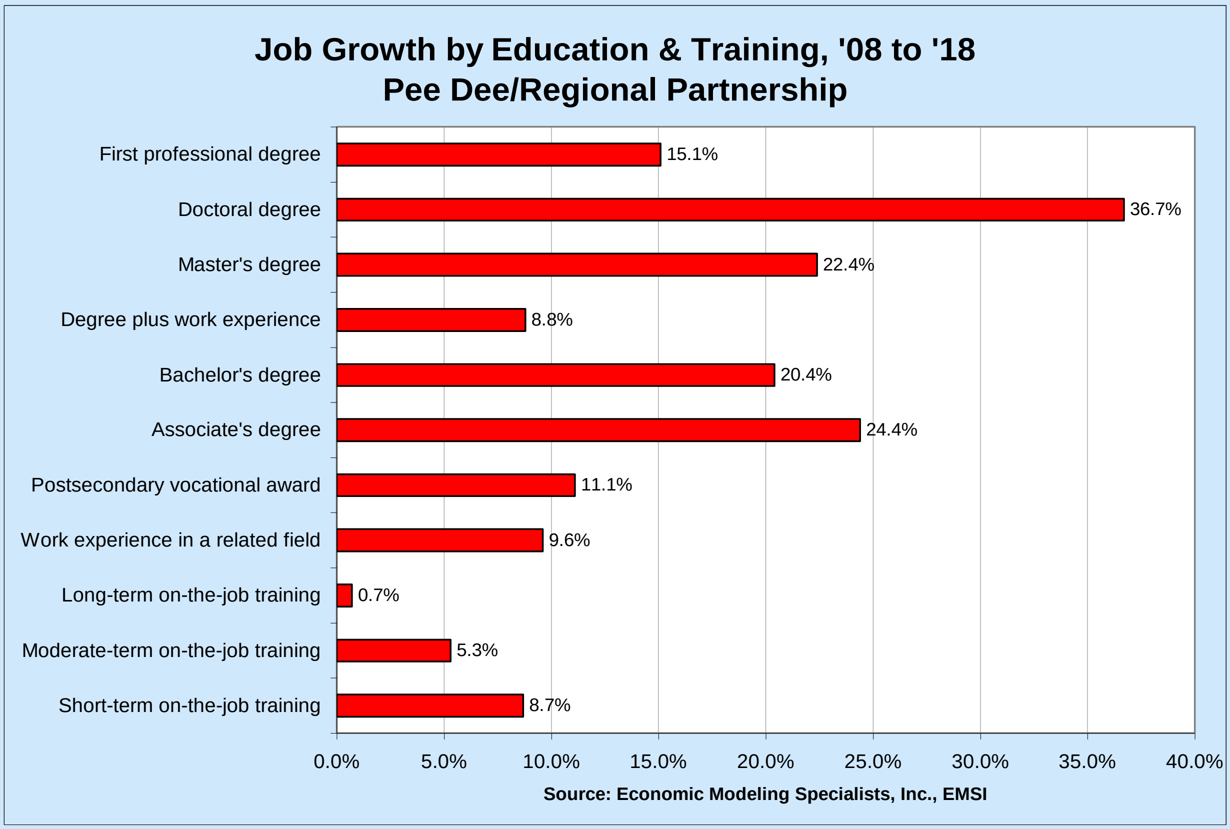
Occupation	2008 Jobs	2018 Jobs	Change '08 to '18	% Change '08 to '18	Education Level
Postsecondary teachers	4,812	6,657	1,845	38%	Doctoral degree
Home health aides	4,668	6,151	1,483	32%	Short-term on-the-job training
Registered nurses	5,051	6,473	1,422	28%	Associate's degree
Combined food preparation and serving workers, inc. fast food	5,903	6,847	944	16%	Short-term on-the-job training
Maids and housekeeping cleaners	4,305	5,152	847	20%	Short-term on-the-job training
Retail salespersons	7,659	8,488	829	11%	Short-term on-the-job training
Customer service representatives	3,447	4,206	759	22%	Moderate-term on-the-job training
Real estate sales agents	2,481	3,175	694	28%	Postsecondary vocational award
Executive secretaries and administrative assistants	3,816	4,479	663	17%	Moderate-term on-the-job training
Real estate brokers	2,602	3,262	660	25%	Work experience in a related field
Business operation specialists, all other	2,034	2,661	627	31%	Bachelor's degree
Accountants and auditors	2,459	2,992	533	22%	Bachelor's degree
Office clerks, general	4,354	4,872	518	12%	Short-term on-the-job training
Elementary school teachers, except special education	2,470	2,968	498	20%	Bachelor's degree
Waiters and waitresses	4,593	5,068	475	10%	Short-term on-the-job training
Personal and home care aides	1,264	1,708	444	35%	Short-term on-the-job training
Property, real estate, and community association managers	1,455	1,885	430	30%	Bachelor's degree
Bookkeeping, accounting, and auditing clerks	3,669	4,091	422	12%	Moderate-term on-the-job training
Computer systems analysts	1,125	1,502	377	34%	Bachelor's degree
Child care workers	2,413	2,767	354	15%	Short-term on-the-job training
Personal financial advisors	862	1,209	347	40%	Bachelor's degree
Teacher assistants	2,684	3,022	338	13%	Short-term on-the-job training
Managers, all other	2,619	2,956	337	13%	Work experience in a related field
Food preparation workers	1,918	2,241	323	17%	Short-term on-the-job training
Social and human service assistants	979	1,295	316	32%	Moderate-term on-the-job training

Source: Economic Modeling Specialists, Inc., EMSI

Occupational Growth by Education and Training: What Does It Mean for the Region?

Across the nation, there is a growing disconnect between the education and training needed to succeed in today's labor market. For the most part, occupations requiring more training are growing faster than those needing on-the job training. This is true in most areas including the Pee Dee and Regional Partnership areas. Reasons for this include the elimination of basic manufacturing and agricultural jobs. Also many of the emerging occupations require extensive education. In the region, the bottom three categories will grow, but at a much slower pace than the occupations requiring Postsecondary training and above.

Chart 46: Job Growth by Education & Training, Pee Dee/Regional Partnership



Occupational Modeling

Bringing the occupational data together from current employment, annual wages and projected growth allows the pieces of information to be weighed against one another to determine which occupations have potential to employ a greater number of individuals in careers that pay well, and have a future in the new economy. If an industry cluster strategy is developed, a similar set of occupations can be created that are specific to that industry cluster. Without a specific industry in mind, occupational modeling was done for the occupations across all industry sectors for the Pee Dee and Regional Partnership. The occupations are listed by the best average ranking score.

Occupational Modeling Summary

There are three lists: Pee Dee/Regional Partnership; Pee Dee; and Regional Partnership. Here are the similarities:

- The quality of jobs on the lists is very high, with low likelihood of part-time employment. Most are expected to have a low potential of unemployment.
- All occupations on the lists pay well above average.
- There are numerous medical related occupations on the lists.
- Following closely are careers in the computer field.
- There are quite a few occupations in the field of education.

TABLE 17: PEE DEE/REGIONAL PARTNERSHIP - OCCUPATIONAL MODELING

Occupation	2008 Jobs	Emp. Rank	Growth '08 to '18	Growth Rank	Annual Wage	Wage Rank	Avg. Ranking	Education Level
Postsecondary teachers	4,812	5	38.3%	14	$90,230	6	8.3	Doctoral degree
Registered nurses	5,051	4	28.2%	62	$55,245	67	44.3	Associate's degree
Computer software engineers, applications	690	98	43.0%	6	$57,886	58	54.0	Bachelor's degree
Computer systems analysts	1,125	68	33.5%	28	$55,037	68	54.7	Bachelor's degree
Business operation specialists, all other	2,034	35	30.8%	44	$48,152	108	62.3	Bachelor's degree
Education administrators, postsecondary	482	143	31.1%	42	$63,627	36	73.7	Degree plus work experience
Medical scientists, except epidemiologists	439	156	37.1%	17	$55,952	65	79.3	Doctoral degree
Elementary school teachers, except special education	2,470	27	20.2%	146	$52,458	81	84.7	Bachelor's degree
Pharmacists	498	138	21.9%	119	$97,115	5	87.3	First professional degree
Computer and information systems managers	625	110	20.3%	142	$79,976	12	88.0	Degree plus work experience
Special education teachers	574	117	25.8%	77	$54,579	71	88.3	Bachelor's degree
Securities, commodities, & financial serv. sales agents	531	130	36.0%	20	$46,384	124	91.3	Bachelor's degree
Dental hygienists	292	210	33.9%	25	$60,528	47	94.0	Associate's degree
Network and computer systems administrators	402	169	31.3%	41	$52,770	79	96.3	Bachelor's degree
Personal financial advisors	862	83	40.3%	9	$38,459	214	102.0	Bachelor's degree
Financial managers	936	81	17.8%	190	$63,045	37	102.7	Degree plus work experience
Network systems and data communications analysts	353	187	50.1%	1	$46,883	120	102.7	Bachelor's degree
Computer software engineers, systems software	361	185	30.5%	47	$52,166	83	105.0	Bachelor's degree
Occupational therapists	280	215	29.6%	50	$57,886	59	108.0	Master's degree
Instructional coordinators	273	223	34.8%	24	$53,435	77	108.0	Master's degree
Physical therapists	258	236	29.1%	52	$62,920	38	108.7	Master's degree
Medical and health services managers	528	131	18.2%	183	$79,290	13	109.0	Degree plus work experience
Middle school teachers	1,340	59	17.8%	192	$49,899	97	116.0	Bachelor's degree
Accountants and auditors	2,459	28	21.7%	122	$39,811	198	116.0	Bachelor's degree
Education administrators, elementary & secondary	527	133	16.9%	211	$83,221	9	117.7	Degree plus work experience

Source: Economic Modeling Specialists, Inc., EMSI

TABLE 18: PEE DEE - OCCUPATIONAL MODELING

Description	2008 Jobs	Emp. Rank	Growth '08 to '18	Growth Rank	Annual Wage	Wage Rank	Avg. Ranking	Education Level
Registered nurses	1,595	5	27.0%	81	$64,293	24	36.7	Associate's degree
Pharmacists	132	121	29.5%	64	$130,166	3	62.7	First professional degree
Postsecondary teachers	554	32	22.2%	135	$64,210	25	64.0	Doctoral degree
Computer systems analysts	76	194	47.4%	10	$62,587	28	77.3	Bachelor's degree
Physical therapists	78	191	33.3%	48	$71,656	17	85.3	Master's degree
Dental hygienists	89	171	31.5%	56	$61,984	29	85.3	Associate's degree
Financial managers	220	90	22.7%	129	$56,576	43	87.3	Degree plus work experience
Network and computer systems administrators	61	217	37.7%	32	$61,214	30	93.0	Bachelor's degree
Lodging managers	130	123	28.5%	71	$46,883	87	93.7	Work experience in a related field
Securities, commodities, & financial sales agents	163	109	53.4%	6	$34,507	171	95.3	Bachelor's degree
Business operation specialists, all other	219	91	25.6%	99	$45,282	97	95.7	Bachelor's degree
Chief executives	396	57	25.8%	95	$37,960	142	98.0	Degree plus work experience
Medical and health services managers	170	106	18.2%	182	$81,682	9	99.0	Degree plus work experience
Management analysts	259	78	27.4%	76	$37,128	146	100.0	Degree plus work experience
Physicians and surgeons	367	63	12.3%	242	$176,675	2	102.3	First professional degree
Computer software engineers, systems software	40	293	50.0%	8	$72,384	14	105.0	Bachelor's degree
Elementary school teachers, except special education	779	18	13.2%	231	$51,563	68	105.7	Bachelor's degree
Respiratory therapists	77	193	29.9%	63	$52,208	63	106.3	Associate's degree
Sales representatives, services, all other	174	103	35.1%	43	$34,362	173	106.3	Moderate-term on-the-job training
Physician assistants	65	212	24.6%	107	$103,355	5	108.0	Bachelor's degree
Radiologic technologists and technicians	191	100	17.8%	189	$56,306	45	111.3	Associate's degree
Loan officers	114	140	24.6%	109	$46,987	86	111.7	Bachelor's degree
Network systems and data communications analysts	49	259	65.3%	2	$50,378	77	112.7	Bachelor's degree
Dental assistants	118	138	32.2%	52	$37,003	148	112.7	Moderate-term on-the-job training
Personal financial advisors	256	80	56.3%	4	$28,621	254	112.7	Bachelor's degree

Source: Economic Modeling Specialists, Inc., EMSI

TABLE 19: REGIONAL PARTNERSHIP - OCCUPATIONAL MODELING

Description	2008 Jobs	Emp. Rank	Growth '08 to '18	Growth Rank	Annual Wage	Wage Rank	Avg. Ranking	Education Level
Postsecondary teachers	4,258	4	40.5%	11	$93,392	4	6.3	Doctoral degree
Computer software engineers, applications	652	81	41.6%	9	$57,824	56	48.7	Bachelor's degree
Registered nurses	3,456	6	28.7%	58	$51,064	85	49.7	Associate's degree
Computer systems analysts	1,048	56	32.6%	34	$54,475	68	52.7	Bachelor's degree
Business operation specialists, all other	1,815	27	31.5%	40	$48,485	105	57.3	Bachelor's degree
Education administrators, postsecondary	429	119	31.9%	38	$64,459	36	64.3	Degree plus work experience
Medical scientists, except epidemiologists	431	118	37.1%	19	$55,931	64	67.0	Doctoral degree
Elementary school teachers, except special education	1,690	33	23.4%	97	$52,853	76	68.7	Bachelor's degree
Special education teachers, preschool, kindergarten, & elementary	454	108	27.3%	68	$55,328	66	80.7	Bachelor's degree
Computer and information systems managers	582	91	19.8%	148	$79,269	12	83.7	Degree plus work experience
Personal financial advisors	606	87	33.5%	30	$43,139	154	90.3	Bachelor's degree
Securities, commodities, and financial services sales agents	369	142	27.9%	63	$52,354	78	94.3	Bachelor's degree
Network and computer systems administrators	341	155	30.2%	50	$51,210	83	96.0	Bachelor's degree
Network systems and data communications analysts	304	170	47.7%	4	$46,259	122	98.7	Bachelor's degree
Dental hygienists	203	227	35.0%	25	$59,883	47	99.7	Associate's degree
Education administrators, elementary and secondary school	386	131	18.7%	165	$87,214	7	101.0	Degree plus work experience
Instructional coordinators	214	214	37.4%	18	$53,914	71	101.0	Master's degree
Middle school teachers, except special & vocational education	967	61	19.9%	147	$49,712	95	101.0	Bachelor's degree
Accountants and auditors	1,981	23	22.4%	106	$40,872	178	102.3	Bachelor's degree
Occupational therapists	244	193	29.5%	55	$56,867	61	103.0	Master's degree
Pharmacists	367	145	19.1%	157	$84,406	8	103.3	First professional degree
Child, family, and school social workers	668	78	24.3%	90	$43,389	149	105.7	Bachelor's degree
Financial managers	717	75	16.2%	214	$65,125	35	108.0	Degree plus work experience
Computer software engineers, systems software	321	165	27.7%	65	$49,379	97	109.0	Bachelor's degree
Medical and health services managers	357	150	18.5%	169	$78,146	13	110.7	Degree plus work experience

Source: Economic Modeling Specialists, Inc., EMSI

Pee Dee Region WORKFORCE Development Board

Regional Partnership WORKFORCE Development Board