



**North Carolina**  
**Department of Commerce**  
***Division of Workforce Solutions***

**Pat McCrory, Governor**

**John E. Skvarla, III, Secretary**

**Will Collins, Assistant Secretary**

September 30, 2015

Mr. Les Range  
Regional Administrator  
U.S. Department of Labor  
Employment and Training Administration  
Sam Nunn Atlanta Federal Center  
61 Forsyth Street, SW Room 6M12  
Atlanta, GA 30303

Dear Mr. Range

Attached is the Program Year 2014 Workforce Information Grants to States Annual Performance Report for North Carolina, as required by Training and Employment Guidance Letter No. 23-13, dated April 28, 2014.

Should you have questions or need additional information, please contact Jackie Keener, Acting Director of the Labor and Economic Analysis Division, at 919-707-1523, or by email at [jacqueline.keener@nccommerce.com](mailto:jacqueline.keener@nccommerce.com).

Sincerely,

A handwritten signature in blue ink, appearing to read "Will Collins".

Will Collins  
Assistant Secretary for Workforce Solutions  
Executive Director – NCWorks

# North Carolina's Workforce Information Grant Annual Performance Report – Program Year 2014

## North Carolina Department of Commerce Labor and Economic Analysis Division

The Labor and Economic Analysis Division (LEAD) of the North Carolina Department of Commerce met planned program year (PY) 2014 (July 1, 2014 through June 30, 2015) milestones as specified in the Workforce Information Grants for States (WIGS) Policy and Program Guidance (TEGL No. 23-13). The following report provides information about LEAD's accomplishments, by deliverable.

### 1. Workforce Information Database with State and Local Data

#### Demand Driven Data Delivery

LEAD populated the Workforce Information Database (WID) version 2.4 with state and local data in accordance with guidelines and set schedules. The database provided the latest labor force, industry, and occupation and wage information for use with LEAD's Internet-based delivery systems, including the primary website delivery application: Demand Driven Data Delivery (D4). The North Carolina WID was also used to facilitate responses for special requests for information from state, regional, and local workforce development boards (WDBs), economic development entities, educational partners, other partner agencies, governmental officials, the media, and the general public. D4 is available here: <http://esesc23.esc.state.nc.us/d4/>

#### NCWorks

NCWorks, developed by the North Carolina Department of Commerce's Division of Workforce Solutions (DWS) in PY 2012, provides a one-stop online resource for job seekers and employers in North Carolina. It provides mechanisms by which job seekers can search for jobs, create resumes, investigate and locate education and training options, and explore a variety of career and occupational information using labor market information. In addition, employers can access and utilize NCWorks to find candidates, post jobs, and search labor market information.

During PY 2104, LEAD staff continued to collaborate with DWS to populate the NCWorks database with workforce information, including Local Area Unemployment Statistics (LAUS), Current Employment Statistics (CES), Quarterly Census of Employment and Wages (QCEW), Occupational Employment Statistics (OES), Industry and Occupational Projections, and Occupations Requiring a License. The NCWorks system utilizes the WID 2.5 data structure. LEAD staff provided assistance in populating the WID database that is utilized in the NCWorks system. NCWorks is available here: <https://www.ncworks.gov/>

## 2. State and Local Industry and Occupational Employment Projections

### Statewide and Sub-State Projections

Statewide and sub-state area, industry and occupational projections were completed using the methodology, software tools, and guidance developed by the Projections Managing Partnership (PMP). In PY 2014, North Carolina completed the statewide short-term and long-term industry and occupational projections as outlined by ETA. Short-term occupational projections were developed for years 2014-2016; long-term sub-state occupational projections were developed for the period 2012-2022. Statewide long-term and short-term projections were submitted for public dissemination following the procedures established by the PMP. Statewide occupational projections were published on the [PMP Projections Central website](#). North Carolina's projections data are available here:

[Statewide industry projections](#)

[Statewide occupational projections](#)

[Sub-state industry projections](#)

[Sub-state occupational projections](#)

In addition to publication and distribution via the website, LEAD is currently developing a series of publications and brochures for public distribution. These products will include occupational projections information including total projected employment, total openings, occupations with the highest employment, fastest-growing occupations, occupations with the highest total openings, and occupations with the highest median annual wage.

Industry and occupational projections are widely used by North Carolina's workforce, educational, and economic development partners. Professionals statewide have made it an essential part of their planning for workforce development, programs and budgets, public policy, and career exploration activities. In order to facilitate the accurate interpretation of these data, projections staff members assisted customers in responding to projections inquiries and through presentations to and consultations with workforce development professionals, economic developers, curriculum planners, career counselors, local and state government officials, researchers, policymakers, Chambers of Commerce, educators, businesses, and the general public. In addition, staff responded to several requests for projections materials, including inquiries from private-sector research institutions using projections information for internal publications.

### Projections Management Partnership

Staff members participated in the Projections Managing Partnership meetings and trainings. As a member of the Projections Management Partnership group, North Carolina's projection team also served as the primary point-of-contact for state analysts for the PY 2014 statewide short-term and long-term occupational projections. North Carolina worked with the PMP Utah staff to develop a web-based submission portal and coordinated with states to submit long and short-term projections to the site. North Carolina will continue to serve as the point-of-contact for the PY 2015 projection estimates. Technical support regarding the creation of the MicroMatrix extracts was provided to state analysts across the country. The division continues to explore new methods of disseminating projections to the public and stakeholders across the state and is exploring the creation of a new web based interface for the North Carolina Department of Commerce website.

## 3. Statewide Annual Economic Analysis

### Economic Snapshots

During PY 2014, LEAD created a new series of publications called *Economic Snapshots*, which detail particular aspects of the North Carolina economy. During PY 2014, four of these publications were made available on the LEAD website, which will be updated as new data becomes available. Current *Economic Snapshots* provide information on topics including state GDP, industry mix, occupational mix, and labor force. *Economic Snapshots* are available here:

<http://www.nccommerce.com/lead/research-publications/state-economic-labor-market-information>

### NC Today

North Carolina also produced and disseminated *NC Today*, a monthly economic analysis of the state's economy. *NC Today* includes a comprehensive analysis of the current labor market conditions and workforce trends. This monthly report provides an overview of the current statewide labor force and industry information along with comparative data from the United States and selected Southern states. It includes a range of analysis and information including employment and unemployment statistics, industry employment and wage measures, a monthly analysis of state unemployment insurance operations (including benefits paid and trust fund activities), and a quarterly update on employer cost for employee compensation. *NC Today* is distributed via the web and softcopies are emailed to the 23 WDB directors. *NC Today* publications are available here:

<http://www.nccommerce.com/lead/research-publications/state-economic-labor-market-information/nc-today>

### State Labor Market Conditions

In addition to the *NC Today*, LEAD publishes and disseminates another monthly publication, *North Carolina Labor Market Conditions*. The publication delivers a summary of state labor force, employment, and unemployment data in narrative and graphic format and compares current monthly data to the previous month and year. The publication also includes a narrative on monthly unemployment insurance activities. *State Labor Market Conditions* publications are available here:

<http://www.nccommerce.com/lead/research-publications/state-economic-labor-market-information/state-labor-market-conditions>

### County Labor Market Conditions

In an effort to provide localized information, LEAD also produces and disseminates *North Carolina County Labor Market Conditions*. This publication is released each month corresponding to the release of the substate unemployment rates, and includes an analysis of labor force statistics and unemployment insurance claims information for each of North Carolina's 100 counties and 15 Metropolitan Statistical Areas. Following each monthly release, a PDF file of this publication is emailed to the 23 WDB directors and is posted on the LEAD web portal. *County Labor Market Conditions* are available here:

<http://www.nccommerce.com/lead/research-publications/regional-economic-labor-market-information/county-labor-market-conditions>

## 4. Other Economic and Labor Market Reports and Products

### Publications & Analysis

LEAD worked to provide and improve the extensive workforce information products and services available via the LEAD website in PY 2014. The website was updated with a variety of informational products and publications including:

- [LEAD Feed](#) – The *LEAD Feed* was developed to disseminate timely economic and labor market analysis written by LEAD staff across a variety of audiences, including workforce professionals, economic developers, policymakers, education partners, and the public. After LEAD organized plans to implement the LEAD Feed in PY 2013, the site was launched September 18, 2014. A sampling of LEAD Feed articles from PY 2014 includes:
  - [Where Have All the Entrepreneurs Gone?](#) – “Experts around the country have started noting a long-term decline in new business start-ups in the United States. Traditionally a backbone of the American economy, small businesses are being replaced by longer living, older companies. Is this trend also occurring in North Carolina?”
  - [Smooth Sailing or Dead in the Water?: Tracking Labor Market Dynamism in NC](#) – “Economic growth in North Carolina has progressed at a steady pace since the worst of the Great Recession. However, several data points show that the state’s labor market is growing less dynamic, with fewer workers hopping from job to job and overall hiring and firing activity stuck at unusually low levels.”
  - [From Textiles to Text Files: The Changing Composition of NC Manufacturing](#) – “The recent growth of North Carolina manufacturing production has resulted in The Tar Heel State having the fourth largest manufacturing economy in the U.S.”
  - [Where Are the Workers?: Assessing Labor Market Mismatch Using the Beveridge Curve](#) – “A recent report from the Bureau of Labor Statistics shows the number of U.S. job openings near a 13-year high. This good news is offset by continued evidence of a “mismatch” between unemployed job seekers and available jobs at the national level. In this post, I explain how the relationship between unemployment and job vacancy rates (the “Beveridge curve”) can help us determine whether a mismatch is also evident in North Carolina’s labor market.”
  - [Who’s Using Temporary Help Workers in North Carolina?](#) – “Temporary and other employment services jobs have been increasing in North Carolina since 2009, but we know very little about the industries in which these jobs are contracted. In this article, we explore a creative method for estimating the number of temp jobs in each industry in which temps are likely to be placed.”
- [Star Jobs](#) – This effort identifies occupations that present promising opportunities for North Carolina’s workforce. Star Jobs are identified using labor market information, including average wages, job growth, and projected number of new jobs, and are categorized by minimum education requirements. Star Jobs are also identified and published for the state’s regional Prosperity Zones.
- [Labor Market Overviews](#) – These monthly-updated fact sheets include economic and labor market data specific to each of North Carolina’s 23 workforce development areas, including unemployment rates, unemployment insurance claims, new corporations, and civilian labor force.
- [County Profiles](#) – County profiles provide a glimpse into the business environment and quality of life in each North Carolina county.

- [Key Economic Indicators](#) – This monthly newsletter provides a snapshot of the state’s economy, including information about current economic trends and conditions.
- [Prosperity Zone Data Books](#) – LEAD created regional (by Prosperity Zone) economic and labor market information data books for economic developers, Business Service Reps, and local officials.
- [Veterans Newsletter](#) – During PY 2014, LEAD worked in partnership with NC Commerce’s Division of Workforce Solutions to publish a quarterly newsletter for veterans geared towards job opportunities and reemployment.

## **AccessNC**

In addition to D4, LEAD staff continued to develop and produce AccessNC, another web-based application that provides additional economic data and business site information. AccessNC allows economic and business planners to retrieve geographic profiles of North Carolina, its 100 counties, and the state’s regional development zones, and to find business properties suitable for location or expansion. During PY2014, LEAD continued to provide web-user guides, which assist individuals in navigating the information available through AccessNC. AccessNC is available here:

<http://accessnc.commerce.state.nc.us/EDIS/page1.html>

Plans for PY 2015 include continuing to merge the functionalities of D4 and AccessNC to improve locating and downloading desired information. The combined systems will improve the user experience taking into account modern UI design best practices as well as providing cross-platform support for a mobile audience. The new system will also leverage web services and application programming interfaces to allow Workforce Boards and other workforce agencies to consume workforce data into their websites.

## **Workforce In-Depth**

During PY 2014, updates and maintenance continued to LEAD’s Workforce In-Depth application, which enables customers to download various data reports by county or WDB. These reports include employment data, population estimates, commuting patterns, and unemployment insurance activities including initial claims and benefit payment activities. Census data was updated to reflect the most recent decennial census. Workforce In-Depth is available here:

<http://esesc23.esc.state.nc.us/WorkForceInDepth/>

## **Collaboration with WDBs and Other Partners**

During the program year, LEAD continued to provide consultative services to our customers and, in particular, our workforce development partners. The demand for information, reports, trainings, and other products continued in PY 2014. Workforce Information Specialists and other LEAD staff handled various support requests from economic developers, workforce professionals, educational partners, and grant writers. In particular, Workforce Information Specialists provided services to the state’s 23 WDBs, which they accomplished by conducting training sessions on Labor Market Information (LMI) products and services, responding to impromptu requests for research and analysis, and serving as presenters at the national and state workforce conferences. LEAD continues to develop and publish custom publications, which summarize the local economic conditions for individual WDB areas. These WDB Newsletters contain a variety of economic and labor market data specific to each of the 23 workforce development areas and include information regarding civilian labor force, employment, unemployment rates, unemployment insurance claim activities, and job openings.

LEAD staff also made presentations and conducted training workshops at local and state conferences for workforce development professionals, Workforce Investment Act (WIA) partner agencies, educational partners, economic developers, and the business community. Staff members participated in various exhibit opportunities and provided printed products and demonstrated interactive data tools. They provided numerous training sessions to improve customer understanding and use of labor market information. LEAD also continues to utilize labor market information to develop career related products and tools and help guide students and job seekers in their career preparation and planning. Specific examples of the support provided by LEAD to key stakeholders include:

- During PY 2014, LEAD staff collaborated with the North Carolina Community College System and the Department of Public Instruction to create the [2015 Career Clusters Guide](#), a valuable resource that targets the career pathways needed to meet educational and employment goals in North Carolina. The guide was published in early PY 2015.
- During PY 2014, LEAD developed a beta version of an application called [Reality Check](#) to present the cost of various lifestyle options and assist students and job seekers in determining their financial needs. Use of this application will help guide them to choose appropriate occupations to support their desired lifestyle. The *Reality Check* site was publically launched in July of PY 2015. LEAD will continue to enhance the *Reality Check* application based on feedback and suggestions from partners, such as educators and workforce professionals.
- In PY 2013, LEAD partnered with the Business Services Representatives of the State's Workforce Development Boards to conduct a [2014 Employer Needs Survey](#), intended to improve understanding of skill gap issues in the state. The survey's final report was released in PY 2014 and results were presented to various partners across the state, including the NCWorks Commission (state Workforce Commission), the NCWorks Commission's Skills Gap Task Force, the North Carolina Community College System, and local Workforce Development Boards. A 2015 update of this survey is underway.
- Performed a regional labor market analysis for Johnston Community College and its surrounding areas to support the college with program planning decision.
- Provided a regional economic and labor force analysis to assess workforce training needs for Halifax Community College .
- Continued collaboration with College Foundation of North Carolina (CFNC), North Carolina Community College System, and North Carolina Department of Public Instruction, and other partners in development of a career information delivery system for students and job seekers.
- Presented four LMI workshops in the Southeastern Employment and Training Spring conference.
- Presented regional labor market tools and resources to TriadWorks, a consortium of four Workforce Development Boards in central North Carolina.
- Presented regional economic and labor market trends to Wake Forest University School of Divinity.
- Conducted LMI trainings and presentations in the annual state Workforce Partnership Conference.
- Provided more than half a dozen LMI trainings across the state to staff from local workforce development boards, community colleges, and career centers.
- Presented demographic and economic trends to an economic development forum in Scotland County.

## **Leveraging ETA, State, and Other Federal Resources**

LEAD works on a wide variety of information and analyses allows for the development of a more complete picture of North Carolina's economy and for more informed policy decisions regarding business recruitment and workforce development.

### **Enhancing Workforce and Educational Information**

LEAD is responsible for the operation of a longitudinal workforce and educational data information system called the North Carolina Common Follow-up System (CFS). The purpose of the CFS is to provide information on the educational and employment outcomes of participants in publicly supported education, employment, and training programs for use in planning, policymaking, program evaluation, resource allocation, and career planning. The North Carolina Department of Commerce received a Workforce Data Quality Initiative (WDQI) through ETA in July of 2013. LEAD is leveraging both state and WDQI grant resources to improve, strengthen, and enhance the CFS. These efforts include enhancing the technology utilized for system processing and storage, enhancing data integrity, updating system documentation, enhancing system outputs and increasing collaboration with the participating agencies.

As part of its effort to develop enhanced system outputs from the CFS, LEAD staff worked in collaboration with the NCWorks Commission (North Carolina's state WDB) in developing performance measures for North Carolina's Workforce Development programs. The work resulted in the completion of a report, "[Measuring the Performance of North Carolina's Workforce Development System](#)" that was delivered by the NCWorks Commission to the North Carolina General Assembly in January of 2015.

In addition, LEAD utilized both state and federal WDQI grant resources to carry out the analyses and evaluation of several of North Carolina's Education and Workforce Development programs. Results of this work culminated in the publication of [The Common Follow-up System Evaluation Report](#) that was delivered to the North Carolina General Assembly in May of 2015. During the program year, LEAD continued to provide support and training on the use of the [North Carolina Tool for Online Workforce and Education Reporting](#) (NCTOWER) which was launched in July of 2014. The NCTOWER website was developed utilizing both state and WDQI resources and provides a mechanism for the electronic delivery and display of 10 years of employment and wage outcomes for educational programs for each of the University of North Carolina's 16 campuses and for all Curriculum programs at each of the 58 colleges of the North Carolina Community College System.

### **Unemployment Insurance & Workforce Information**

LEAD also produces the following weekly and monthly reports on unemployment insurance claims and workforce data:

- [Unemployment Insurance Weekly Claims](#) – Highlights weekly initial claims, new claims, and weeks claimed during each week. Also provides a comparative analysis for the current week and previous weeks of initial claims, new claims, and weeks claimed for a five-year period. An analysis of initial claims by industry is also presented.
- [Unemployment Insurance Monthly Claims](#) – Highlights statistics and analysis for the Regular Unemployment Insurance (UI) program, including statewide, county, and industry-level, initial claims, and weeks-claimed data. Demographic breakouts of sex, race, and age ranges are included for individuals filing initial claims.
- [Workforce Monthly Activity](#) – Workforce Monthly Activity reports contain information on activities in the area of labor market information, unemployment insurance, and employment service.