

COMPETITIVE WORKFORCE ALLIANCE

The Workforce Network for the Charlotte Region



BUILDING A COMPETITIVE WORKFORCE ADVANTAGE FOR THE REGION

2005
STATE OF THE WORKFORCE



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Corporation for a Skilled Workforce (CSW) is a national nonprofit workforce development policy and change management organization based in Ann Arbor, Michigan. (www.skilledwork.org) CSW specializes in helping communities thrive in a knowledge- and skill-based economy through the strategic development of community workforce, education, and economic capacity building. Our products and services include training, group facilitation, policy development, and executive coaching from the national level to the local level.

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About the Competitive Workforce Alliance

The Competitive Workforce Alliance is the workforce network for the greater Charlotte Region. We are the Centralina Workforce Development Board, the Charlotte-Mecklenburg Workforce Development Board, and the Gaston County Workforce Development Board. Together, we are driving solutions to workforce and business issues in our counties. This unique alliance provides resources, training, and business services through a network of JobLink Career Centers. We encourage our Boards to preserve and promote their own unique services and relationships in their counties.

Telling the Charlotte Region's Story

In 2004 and 2005, the workforce boards for three Charlotte-area Workforce Development Boards (Gaston, Charlotte-Mecklenburg and Centralina) banded together to produce a *State of the Workforce Report* for the Charlotte region, which includes the counties of Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly and Union. The report also includes the South Carolina counties of Chester, Lancaster and York. For purposes of this study only, the region is referred to as the "Charlotte Region." This data tells a story about the Charlotte region - its strengths, its challenges, and its opportunities..

The Story So Far...

High quality human resources have always been an important component to a region's economic success. In this fast-changing, global, technology-driven economy, workforce issues must be an integral part of the debate about how to position the region for sustainable economic growth. Regional economic development cannot succeed without a stronger emphasis on and strategic investment in workforce development.

The Charlotte Region has seen tremendous growth and prosperity in recent decades. Quality of life in the region is very high and is a key driver of growth. But this growth cannot be maintained without coordinated action. The central conclusion of the *State of the Workforce Report 2005* is that a competitive workforce advantage can be realized if the strengths of the region are bolstered and the challenges are addressed strategically.

Creating the Rest of the Story

Implementing the vision of a competitive regional workforce will require participation and leadership that spans sectors, organizational interests and geographic boundaries. A solid foundation for cooperation has been built in recent years and can be leveraged if strategic actions continue to be carefully crafted.

The issues identified during the process of compiling the *State of the Workforce Report 2005* really are storylines and reported as such. A popular national radio announcer, Paul Harvey, used to effectively punctuate his broadcasts with a pregnant pause and then proceed to report on "the rest of the story." Regional leadership is focused on creation of a *competitive workforce advantage*, where the rest of the story is ready to be told.



Introduction

Purpose

Welcome to the *State of the Workforce Report 2005* for the Charlotte Region. It provides a snapshot of the region's varied strengths and challenges. While there is county specific data, this project focuses on the region and how the region is doing. It also outlines important issues facing the region and frames key opportunities for action that are designed to answer the question: *Do we have a competitive workforce advantage?*

Objectives

- **Identify competitive strengths and challenges for the Charlotte Region;**
- **Build a credible foundation for strategic planning;**
- **Engage policy makers and stakeholders; and**
- **Take action.**

How to Read this Report

T**his report is a call to action.** Right now, the Charlotte Region is a place where people want to live, and work and businesses and institutions thrive. If these trends are to continue, then important changes must take place. What exactly needs changing is part of an ongoing discussion in which stakeholders throughout the region should be engaged. This will help create a *competitive workforce advantage* where the end product is a thriving community.

A better understanding of our *shared* challenges is essential to developing a unified community response to workforce and economic development. The overarching goal of this *State of the Workforce Report 2005* is to share data with business, economic development, government, labor, education, and other community leaders that demonstrates that 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 now more than ever, 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. Regional economic development cannot succeed without a stronger emphasis on and strategic investment in workforce development.





The *State of the Workforce Report 2005* includes overall trends for a number of community factors that are relevant to the regional labor market, including workforce supply and demand side indicators, and offers an analysis of the implications these trends have for achieving workforce excellence in the region. This report also provides a brief assessment of the career development system and how the education providers in the community are doing. The information contained in this report comes from several sources, including statistical information compiled by the U.S. Census Bureau, the Federal Bureau of Labor Statistics, and the North Carolina Department of Labor, as well as numerous existing studies and reports that provided context for the analytical data. These data sources were supplemented with community focus groups and face-to-face interviews that included regional community leaders, business owners, educators, economic development entities, community advocates, and government leaders.

The report is built around major “storylines” for the region, with supporting data provided for each storyline. Additional supporting data is provided in the data appendix on the included CD. This is not an exhaustive recitation of all data that exists, and more timely data is being generated every day. The data in the *State of the Workforce Report 2005* is a “snapshot” of the region which is used to view the major trends and changes that are impacting the region.

This report, while integral to the strategic planning process, is not a strategic plan. It is a research study created to foster dynamic discussions about the future of the region. We hope that this *State of the Workforce Report 2005* will help to further the development of two of the region's essential resources: highly skilled, knowledgeable workers and highly successful employers. By working together to promote the strengths of our region and to achieve workforce excellence, we can make this region the best it can be.

Acknowledgements

Preparation of this *State of the Workforce Report 2005* was a collaborative effort between the Centralina, Charlotte-Mecklenburg, and Gaston Workforce Development Boards and an advisory task force comprised of key representatives from government, economic development, education, and business and industry. Many thanks to the members of the task force who provided valuable insights as this report was prepared. Also, many thanks to the more than 200 community stakeholders who participated in the interviews and community forums and provided important and clarifying information to help the report go beyond a simple listing of statistics.

The Corporation for a Skilled Workforce (CSW), an Ann Arbor, Michigan based workforce development research and consulting organization, did the research and wrote this report. CSW's team consisted of Project Manager John P. Metcalf,





Tim Dunn and Gary Yakimov who compiled the research and provided analysis, and Donna Crudder, who provided facilitation expertise. Logistics support provided by the boards' staffs was exceptional and the tasks of gathering data and conducting face-to-face activities would have proven impossible without that help.

Funding for this report was provided by the State of North Carolina's Commission on Workforce Development.

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





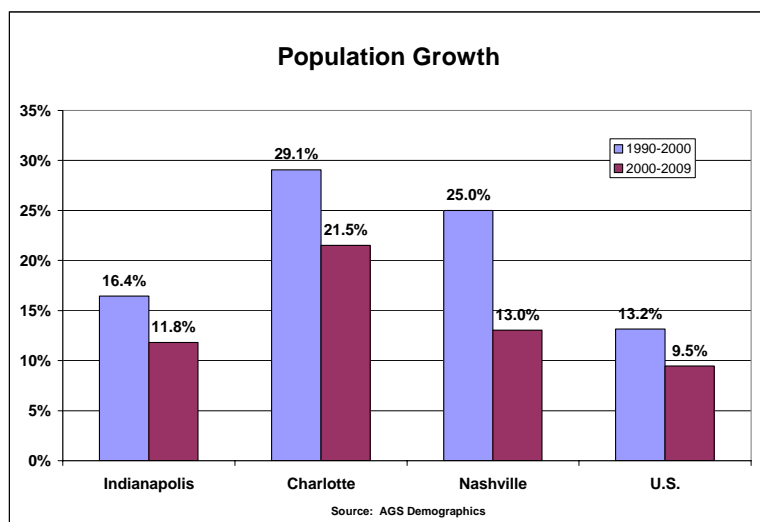
With Great Growth Comes the Need for Stability

Closer alignment between jobs and workers is needed

The Charlotte Region is one of the top 50 largest metropolitan areas in the nation, and ranked 25th in fastest growing areas with over one million residents. In the decade from 1990 to 2000 the Charlotte Metropolitan Area experienced an exceptionally high population growth of 29.1% compared to the U.S. growth of 13.2%.¹ This growth, as well as projected future growth, is attributable to a wide variety of factors. Over 238,000 new residents have moved to the region from a different state since 1995.² While it is not known if those new residents moved because of something specific such as the job market, or a more general reason such as the quality of life, it is safe to say that the region has been and continues to be an attractive place to reside.

The art of progress is to preserve order amid change and to preserve change amid order.

— Alfred Whitehead



In addition to national recognition as a desirable metropolitan area, the region is attracting significant numbers of international immigrants. Over 48,000 foreign-born residents, or 44% of the region's total foreign-born population, came to the Charlotte Region between 1995 and 2000.³ The immigrant and foreign-born population in the region increased significantly over

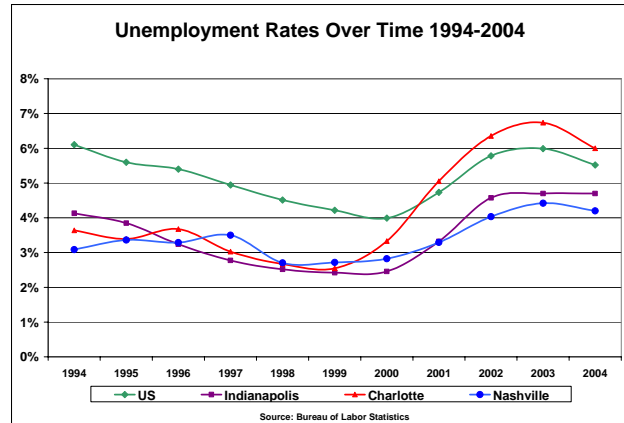
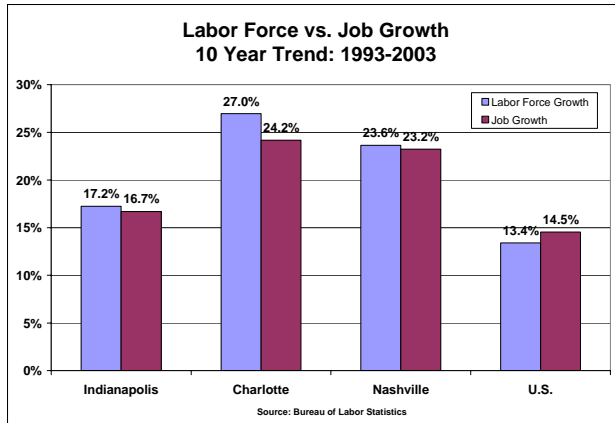
recent years. Challenges arise from these trends, such as the need to support the 146,800 residents who report that English is not their first language. The rapid growth in immigrants also poses challenges for the region in workplace culture and values, social services, and educational systems. When addressing these

¹ U.S. Census Bureau, 1990 & 2000 Census

² Ibid.

³ Ibid





challenges, the region must be careful to prevent the gentrification of ethnic communities in the region.

The growing population has aided economic expansion by helping to meet the demands of employers in the region. The increasing supply of available workers has been feeding job growth. The region's overall labor force grew by 27% from 1993 to 2003, which was higher than the growth rate in the U.S. as well as in cities such as Nashville and Indianapolis.⁴

While job growth and labor force growth are nearly double that of the U.S. average and also higher than comparison areas, there are warning signs on the horizon. **The alignment of supply (labor force) and demand (job growth) in the area has begun to weaken over the past five years,** whereas the previous ten years had seen near perfect alignment. When the number of jobs was growing at a rate better matched to the available labor force, the region benefited through economic growth and enjoyed low unemployment rates. However, the high pace of population growth and related growing labor force make it difficult for the job market to keep up. This trend becomes particularly ominous in the face of increasing globalization, off-shoring, and outsourcing. Even in a good economy, the population is growing at more rapid rates than the job market can sustain. In a bad economy, this becomes a volatile and dangerous mix.

Rapid population growth also places additional pressures on the infrastructure of the region, including things such as roads and traffic patterns, cost of housing, and quality of education. Balancing the relationship between growth and stability is one of the region's most urgent challenges.

⁴ Interviews with regional leaders identified Indianapolis and Nashville as competitors with Charlotte; thus a decision was made to use them in comparison data throughout the report. Areas within the Charlotte region are compared against one another in the Appendix for Competitive Workforce Indicators.





Bottom Line

It is imperative that economic, workforce, education, and community development activities align to create an integrated and systemic approach to address the current and future needs of the region. Economic development must leverage the assets and resources of the region to retain, support, and expand on existing businesses. While supporting existing business needs, there must also be a focus on attracting new employers that offer high-wage high-skill jobs and reinforce cluster strategies.

Workforce development activities include identifying the workforce needs of businesses, disseminating information to both employers and educator, and, more broadly, helping the current economy thrive while preparing the region for the future. If development activities do not align for the Charlotte Regional Partnership, current challenges may be exacerbated and approaching challenges could very well become actual problems. The alignment of activities, resources, and strategies is not a silver bullet resolving regional problems. In order for this approach to be successful and lead to systemic changes, there will need to be ongoing regional communication, reassessment, and realignment.





A Cluster-Based Approach Can Help Align Resources and Strategies

Sector choices must be made to align resources

Thoughtful industry cluster-based strategies, based on regional assets and leverage points rather than fad industries or industries that are currently receiving national attention (and hence increased competition), can ensure that regional population growth is met by available jobs. A cluster-based strategy is driven by industry clusters that are collections of firms in related industries located in close proximity to one another.⁵ Cluster-based strategies evolved in economic development because of the inherent competitive advantages, including sharing a common labor pool, enhancing close working relationships between firms, reducing transaction costs and travel times between customers and suppliers, and enhancing the spread of technology through firms in the region.⁶ As a cluster in a region takes root and expands, synergies often develop between firms and institutions, spurring additional growth and innovation. **A cluster-based strategy can be the catalyst around which workforce development, economic development, community development, and student development (i.e. education) can align strategies and resources.**

The object of all work is production or accomplishment and to either of these ends there must be forethought, system, planning, intelligence, and honest purpose, as well as perspiration. Seeming to do is not doing.

—Thomas Edison

Through learning about and understanding the needs of cluster industries, targeted actions and investments can identify gaps and opportunities in the local economy. Regional developers can develop strategies to complement existing industries in the area. A regional focus on local strengths and industries can effectively and efficiently streamline marketing efforts and workforce development as well as produce a greater return on regional investments.

Cluster-based strategies also enable community organizations and others providing support services to increase their efficiency and effectiveness by directing services toward larger groups of firms. For example, organizations can

⁵ Carnegie Mellon Center for Economic Development, "Cluster-Based Community Development Strategies – A Guide for Integrating Communities with Regional Industry Cluster Strategies," March 19, 2002

⁶ Ibid





enhance an entire industry's employee retention efforts through their childcare services, transportation services, housing and home ownership programs, and training programs. Organizations also have the opportunity to build relationships with an industry that can facilitate the delivery of their services. Community organizations can work together with industry and public agencies to assist people in moving from welfare-to-work or school-to-work into specific industries with promising futures.

Assets of Cluster Based Strategies	Benefits of Cluster Based Strategies
<ul style="list-style-type: none"> • Specialized workforce • Specialized services • Choice of inputs • Range of firms • Association • Trust • Learning • Informal labor markets 	<ul style="list-style-type: none"> • Higher productivity • Faster and easier access • Lower cost, higher quality • Joint ventures, network opportunities • Collective vision, planning, influence • Inter-firm collaboration and networks • Technology transfer and innovation; tacit knowledge and know-how • Efficiencies, career ladders

Source: A Governor's Guide to Cluster-Based Economic Development, National Governors Association, 2002

Fortunately, both the Charlotte Region and the state of North Carolina have been actively pursuing a cluster-based strategy. However, the region is at a crossroads in choosing which clusters to pursue for aligning strategies and resources. The region has already defined its need for cluster-based strategies and has done both qualitative and quantitative research around industry sectors. While this report does not formally define sectors of focus, there were some industries that were frequently discussed in the studies reviewed. This included traditionally strong industries, those that expand on current regional assets, and those that showed a strong future in the new economy of technology and innovation.

- ◆ **Pharmaceuticals & Bio-informatics** is seen as a strongly emerging industry sector. The Charlotte Region has a growing critical mass of companies and entities in this sector, and industry trends indicate this cluster will grow rapidly from its current employment base of 3,200 in pharmaceuticals and roughly another 1,000 in bio-informatics related businesses.⁷ This is a very competitive sector; nearly every state and region in the nation has an eye towards developing this sector. This high-skill and high wage-sector is technology intensive and will require a wide range of skilled workers. Thus, to be successful in developing this sector,

⁷ Bureau of Labor Statistics, Employment Security Commission of North Carolina





there is a need to have a strong education and training as well as research and development infrastructure.

- ◆ **Finance & Insurance** has a firm hold in Charlotte's economy with over 2,800 firms in the region that employ over 50,000 people.⁸ Large businesses like Bank of America and Wachovia have their corporate headquarters in the Charlotte Region. Within the sector, there is a wide variety of in-demand occupations ranging from administrative support and clerical to accounting and security/commodity sales.
- ◆ **Logistics (inclusive of Transportation and Warehousing)** is already present in the Charlotte Region. There has been employment growth in the sector and concentrated efforts to relate just-in-time manufacturing to supply-chain management and distributions systems. The emerging transportation and distribution centers, like the Charlotte Region and the Piedmont Triad, are relying heavily on land based-transportation system. This is a sought-after industry cluster across the state as well as across the country. An opportunity exists for the Charlotte-Douglas airport to play a significant role as an inter-modal hub serving air, rail, road and port traffic. As the industry shifts to more advanced operations, there is more reliance on information technology. Advanced and technical operations include such things as global tracking systems, bar code technology, automated conveyor systems and robotics, and an increased demand for knowledge of software development and programming.
- ◆ **Automotive & Motor Sports.** Besides the 8,000 plus jobs in automotive manufacturing, there is a strong automotive research and development sector that goes along with the motor sports industry in the Charlotte Region. In North Carolina the motor sports industry total spending is over five billion dollars, generating over 24,000 jobs with an average wage of \$70,000.⁹
 - A report developed by UNC Charlotte refers to the motor sports industry as standing on three legs.¹⁰ First, the industry is an attraction for new residents; people are moving to the Charlotte Region to be a part of the industry. Second, there is a large tourism component to the sport. Sports fans come to the region to tour team shops and museums, and provide revenue to support events and venues. The third leg of the motor sports industry is technology. Numerous universities, community colleges, and private sector businesses have become involved in the research and development of the sport.

⁸ Ibid

⁹ The Sanford Holshouser Business Development Group in cooperation with UNC Charlotte Urban Institute, "Motorsports - A North Carolina Growth Industry Under Threat," October 2004,

¹⁰ Ibid.





- Schools like the NASCAR Technical Institute (NTI) or UNC Charlotte's motor sports engineering program are getting recognition in the media, as well as producing a stream of qualified workers ready to enter into the more technically advanced positions in motor sports.¹¹ The industry is rooted in the state with a long history and is growing quickly in the region. The attention and recognition the motor sports industry is receiving as an economic generator is making it a sought-after commodity. Nationally the competition is fierce, but North Carolina has a competitive advantage in the industry because of its history in the sport.
- ◆ **Manufacturing.** Underlying all the cluster research in the region is the importance of an advanced and vibrant component. The future of the manufacturing industry base is in automation, technology, and modernization. The advanced manufacturing industry will also support growth and innovation in other clusters. The manufacturing industry has had serious job losses over the last decade due to restructuring and outsourcing, but the sector remains a significant employer in the region. In 2003, the manufacturing sector had 2,353 businesses and employed 96,890 workers. It is the sustainability of the manufacturing industry that is critical for the Charlotte Region because of what it contributes in terms of employment and overall health of the region's economy. Manufacturing employed 12.9% of total workers in the region and other businesses are dependent on the close proximity of goods manufacturing, as well as manufacturing employment income that supports retail and other services. The manufacturing businesses are part of the supply chain in the region; and the people working in manufacturing put their earnings back into the economy through retail, construction, and support jobs.
- The evolution of the manufacturing industry has been significant over the past two decades. Manufacturing is starting to shed the image of a smoke-billowing factory and replace it with the technologically advanced and vibrant manufacturing industry of the new century. Both the present and future models of the industries are based on efficiency (read productivity) and technology. There is a wide range of technology-based jobs beyond production, such as quality control, purchasing, information systems, engineering and design, management, and sales. The world of manufacturing, despite many past efforts to promote its careers and benefits, remains a hidden, misunderstood industry in the Charlotte Region.

Utilizing the resources in the region to create and maintain a competitive advantage in cluster-based strategies, no matter which clusters are selected,

¹¹ Jenkins, Chris. USA Today Wednesday, February 16th 2005, *Getting Careers on Track*





depends on aligning the private and educational sectors for success. Accelerating cluster growth and development is possible if public, private, and educational sectors explore the barriers and opportunities in a region that can foster cluster growth. Utilizing this qualitative approach helps clarify the relationships within the industry and pinpoint specific infrastructure needs. Successful cluster strategies have a large amount of interactivity and have the ultimate goal of creating new collaborative partnerships between business, government, education, and the community to support infrastructure needs.

Bottom Line

This region needs to make a decision. The variety of industry sectors offered by studies illustrates the strength of the regional economy and points to a diverse economy. However, it is time for regional leadership to focus in on specific industries and develop a comprehensive industry cluster strategy. With the information provided by CEDS (the Comprehensive Economic Development Study), Advantage Carolina, and Duke Energy, plus the local economic expertise, there exists the knowledge needed to make a decision. The comprehensive industry sector strategy will benefit the region as a whole by unifying economic, workforce, and education development around well chosen industry clusters.

There are concerns expressed by communities around limited resources and inter-regional competition for jobs, however, not acting because of those concerns has dire implications. In the global economy the fear is not losing a company to a neighboring county but to another state or another country. A regional approach to sector based strategies will support economic growth in all the communities of the region. Leadership is in a position to use the strength of the current economy as momentum to help build a stronger, more unified approach to workforce, economic, and education development through cluster based strategies. Egos need to be put aside and the economic entities need to make decisions.





Technology is an Enabler of Economic and Workforce Development

Technology is the engine driving our knowledge and skill-based economy

A large part of industry cluster strategies is in developing the infrastructure to support those clusters. That infrastructure includes not only the tangible components, such as roads and real estate, but also the invisible elements inclusive of both technology components and processes. Technology is an integral factor in regional efforts to become an information-driven, knowledge based economy. As more of the world comes online, technology offers the region an unparalleled opportunity to become more competitive nationally and globally. Thomas L. Friedman, in an editorial column published in the Charlotte Observer on August 4, 2005, page 9A, said, "... this is not about gadgets. The world is moving to an Internet-based platform for commerce, education, innovation and entertainment. Wealth and productivity will go to those countries, or companies, that get more innovators, educators, students, workers and suppliers connected to this platform via computers, phones and PDAs." The utilization of technology enhances communication, fosters businesses and employment creation, provides an access point to education and learning opportunities, and provides another means for government agencies to interact with the community. Overall, technology enables individuals and communities to enhance their social and economic well-being and participate more actively in society.

The new engine of regional economic prosperity is based upon how successful a given location is in attracting and expanding technology and science assets and leveraging them for economic development.

— State Technology and Science Index, Milken Institute, 2004

In North Carolina, the region is attractive to people and businesses because of its reputation as a strong and diverse economy that supports a large number of good jobs. There have been investments in fiber-optics, digital telecommunications, and the development of new ways to integrate technology that may indicate an opportunity for the region to become a crossroads for technology infrastructure development and investment. The investment by public and private sources in the technology infrastructure is evident in the city of Charlotte and has attracted many companies, including Verbatim, EDS, Onstar, Digital Optics, and TIAA-CREF. The region has also invested in information technology programs in post-secondary schools. This has helped to attract major IT firms such as Microsoft, which located its





east coast support center in the region (a facility that is currently the second largest of its kind in the world).

The Charlotte Region is competitive globally; however, cities like Indianapolis and Nashville are also investing in their technology infrastructure. In the *New Economy Index* (NEI), the Charlotte Region shows so-so competition in the technology race. The Charlotte MSA ranks 30th out of the 50 metropolitan areas that were ranked in the NEI. Using indicators such as number of commercial internet domains, portion of high tech jobs, and on-line population, the region ranks in the lower half of metropolitan areas. Indianapolis and Nashville are consistent competitors with Charlotte and in some cases are ranked higher in the NEI than Charlotte. This region must do more to accelerate its competitive position.

Indicator	Charlotte MSA	Indianapolis MSA	Nashville MSA
Overall	30	29	32
On-line population	39	23	43
Broadband Telecom	27	28	16
Computer Use in Schools	6	7	29
Commercial Internet Domains	36	39	27
Internet Backbone	19	18	34
High-Tech Jobs	29	30	45
Degrees in Science and Engineering	48	37	23

Source: New Economy Index, Progressive Policy Institute, <http://www.neweconomyindex.org/metro/index.html>

The success of a knowledge and information driven economy rests on having e-citizens and e-communities; that is, literate people with optimal access to computers, the Internet, and other technology; and a "wired" region. A large e-citizen base provides the most likelihood of developing the entrepreneurs, knowledge workers, managers, consumers, students, and innovators essential for a thriving knowledge economy.

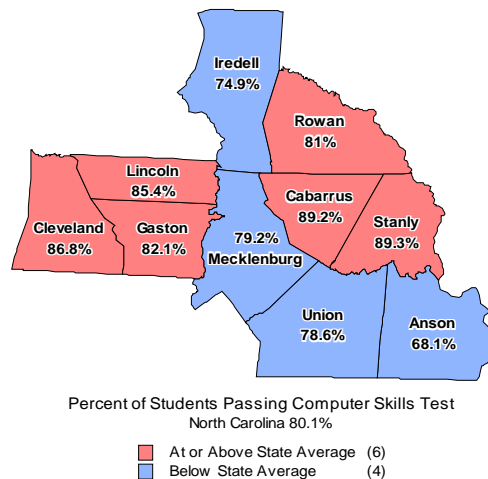
The “digital divide” is the gap between the information haves, i.e. those who have adequate access to technology such as computers and the internet, and the information have-nots, i.e. those who have limited or no access for either socio-economic or geographic reasons. As use of technology is integrated into the normal processes of daily life, the negative impact of the digital divide on the cohesion of society is likely to become much more acute. Besides the have and have-nots in technology there is also a need for more sophisticated interaction with technology. There must be emphasis put on use of technology as well as mastery of it.

The need for mastery is universally important for the current workforce as well as for the emerging workforce. Currently, there are only four counties in the





region which have a lower than state average of students passing the computer skills test. This corridor of counties cuts down the center of the region from Iredell through Mecklenburg and leading to Union and Anson. The lower percentages of students passing the computer skills test in these counties raise concern, because some of the largest student populations are found there. Overall, the region is performing well in assessments of computer access. In nearly every county there is a good ratio of students per computer, and the region overall is ranked 6th in the NEI for computer use in schools.



Source: North Carolina Department of Public Instruction. Data for South Carolina counties was not available.

Bottom Line

When it comes to the information-driven economy, the region is recognized by business as a national leader. However, as national and global competition gets more aggressive the region cannot stand still or it will only fall behind. Providing access points for the technology have-nots and bridging the digital divide will allow the labor force to move at the pace of innovation. A technology savvy labor force will enable the region’s economy to compete and prosper on a global stage where the skills, knowledge, and ability of the workforce will distinguish who are the economic leaders and who are those that follow. Fully utilizing current technology and positioning the region at the forefront of technology integration will enable the region to continue as global player in the information-driven knowledge-based economy. Leadership must look at this as a regional issue and plan to collaboratively invest in the infrastructure while we are simultaneously preparing the incumbent and emerging workforces. This is an area where inaction is not acceptable.





A Well Prepared and Career Aware Workforce is Essential to Maintaining Economic Vitality

The Charlotte Region is at a crossroads: either meet global standards or become mediocre

The knowledge and skill driven economy and sectors of focus for the region are dependent upon a well-educated, highly skilled workforce. Education and learning beyond high school is perhaps the single most important factor influencing economic prosperity. Associate’s and Bachelor’s degrees are now the minimum “tickets” to good paying entry-level work. Individuals need postsecondary credentials, and they need companies with jobs and career opportunities that can employ them once they have those credentials. Just having a high school diploma or GED is no longer good enough.

As change and restructuring in companies, occupations, and industries becomes more common-place, all levels of workers need ongoing training and learning opportunities to ensure they have the skills and experience to remain employable throughout their lifetime. To stay competitive and profitable, and to provide good employment opportunities in the region, companies must ensure that they have access to a constant stream of workers with the right mix of skills and interests, and the workers have the ability to “learn to learn.” To paraphrase Alvin Toffler, author of *Future Shock*, literacy in the 21st century will be measured by whether a person can learn to learn, learn to unlearn, and learn to relearn. That future is here.

In the leadership and employer interviews conducted for this study, there was a general perception that the education and training system needs a lot of improvement. Overall, the community college and career and technical (CTE) programs scored well, as did employer satisfaction with four-year programs. The level of satisfaction dropped considerably regarding the secondary systems in the region as employers consistently expressed their concern regarding the preparedness of the emerging workforce.

Education Indicators for Charlotte Region

- + Career and Tech Prep Courses**
- = Drop Out Rates**
- = High School Completion Rate**
- = Gifted Students**
- Advanced College Prep Courses**
- Expenditure per Pupil**
- Yearly Progress**
- SAT Scores**
- Exceptional Students**

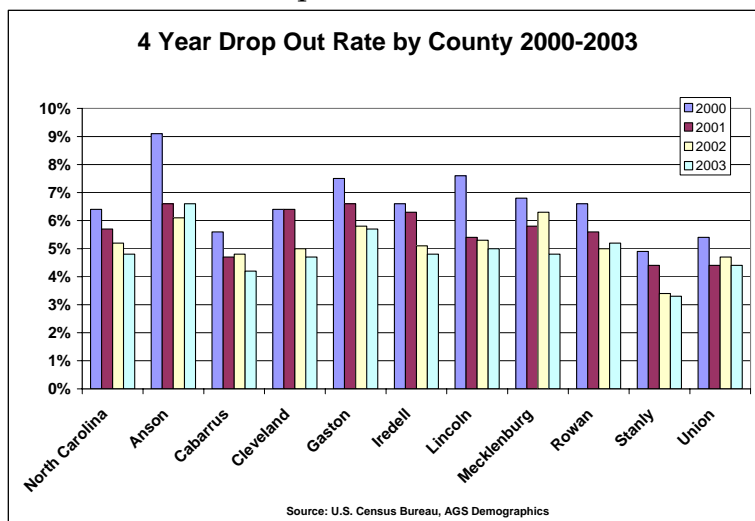
- + Above state level**
- = At state level**
- Below state level**





Education and Training Indicators Cause for Concern

Education indicators are often used to compare schools and districts and identify “winners” and “losers,” when what matters more for educational improvement is what scores tell us about regional competitiveness, how much students know, and whether their achievement is improving over time. A basic indicator of youth achievement is the annual drop-out rate. Achievement of a high school diploma is an indicator that a young adult has the basic skills needed to enter the labor market. While the region is improving and the percent of students dropping out of school has decreased over time, it remains inconsistent across the region.



Continued improvement is a good indicator, but, like other education

indicators, there needs to be more equality across the region, since it is a shared labor market. For example, even though Cabarrus has a low drop-out rate, if Cabarrus employers are drawing workers from Mecklenburg, they should be concerned.

With drop-out rates improving over time, the next question is; do graduates have the skills needed to succeed in postsecondary schools and the workforce? Basic reading and math proficiency exams are taken in both 3rd and 8th grade in North Carolina Public Schools, and in 2003, the percent of students passing the proficiency exams varied across the Charlotte Region. This is another case of improvements being as important as the current trends. Both the 3rd and the 8th grade proficiency exams show some variance across the region, but the all counties have improved their percentage of students passing.

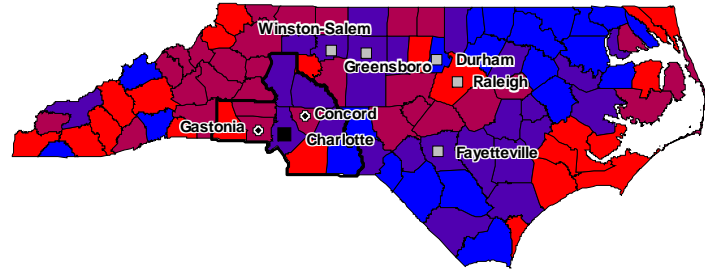




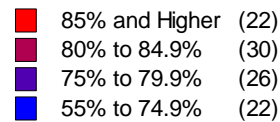
Charlotte Region's 3rd Grade Students Proficient in Reading and Math

	1998	2001	2002	2003
State	61%	67%	71%	79%
Anson	47%	47%	49%	62%
Cabarrus	69%	72%	76%	82%
Cleveland	64%	69%	74%	86%
Gaston	59%	68%	73%	82%
Iredell	58%	66%	73%	77%
Lincoln	62%	66%	73%	81%
Mecklenburg	59%	66%	70%	79%
Rowan	57%	63%	66%	77%
Stanly	71%	66%	69%	78%
Union	67%	72%	78%	85%

Source: Child Advocacy Institute



Percent of 3rd Grade Students Proficient in Reading and Math
North Carolina: 79%

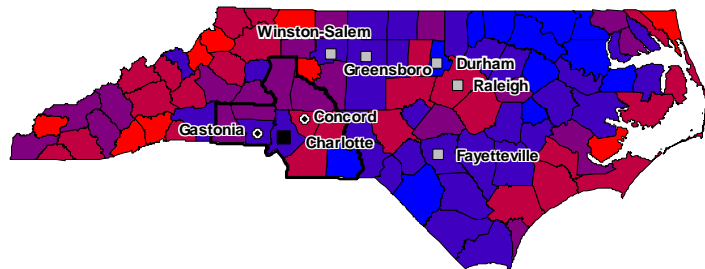


Source: North Carolina Department of Public Instruction

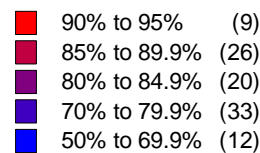
Charlotte Region's 8th Grade Students Proficient in Reading and Math

	1998	2001	2002	2003
State	71%	75%	77%	80%
Anson	60%	58%	66%	68%
Cabarrus	80%	79%	80%	85%
Cleveland	70%	73%	77%	84%
Gaston	64%	71%	76%	78%
Iredell	75%	78%	80%	83%
Lincoln	64%	73%	76%	81%
Mecklenburg	64%	69%	73%	75%
Rowan	69%	70%	76%	82%
Stanly	77%	83%	88%	87%
Union	77%	79%	82%	86%

Source: Child Advocacy Institute



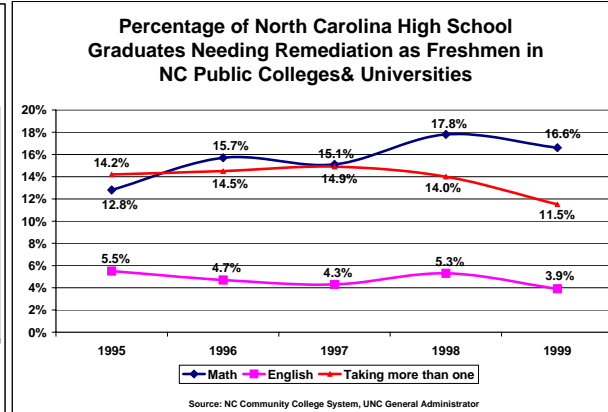
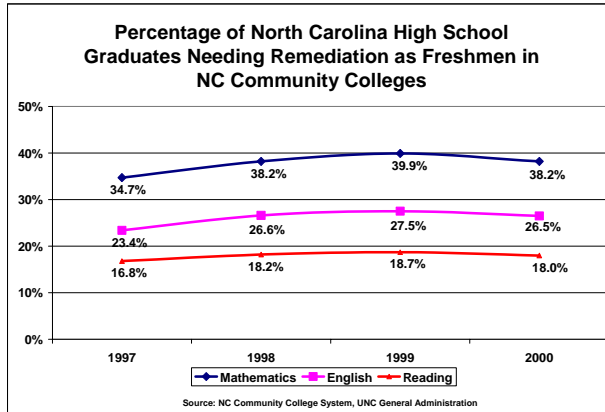
Percent of 8th Grader Students Proficient in Reading and Math
North Carolina: 80%



Source: North Carolina Department of Public Instruction

As students move through the education system in the region, they are assumed to be gaining the skills needed to succeed in postsecondary schools or entry level employment. However, about one-third of the students entering North Carolina's community college system in any given year are taking remedial education courses. This should be unacceptable to a community that is competing on a global basis for a community advantage. Both traditional age students enrolling in college immediately after high school graduation and adult students who may be pursuing personal interests, preparing for transfer, upgrading job skills, or preparing to change careers, are putting additional stress on remedial education needs.





The increase in the number of under-prepared students raises concerns that limited college resources may be overwhelmed by demands for remediation, and that other desirable college programs such as transfer, career, occupation, noncredit and continuing education offerings may be adversely affected.

Raising Career Awareness for the Emerging Workforce

A forward-thinking approach to increasing regional competitiveness is to equip today's and tomorrow's citizens with the skills and attitudes for economic and civic success. One component of that approach is linking education, workforce, and economic development by creating a system to promote career awareness. Building partnerships between industry, educators, employers, and community-based organizations to promote career awareness will help to create an education system that effectively incorporates school- and work-based learning to help youth make sound career decisions – decisions that are based on current and future market demand, occupational interest, and matching jobs with educational and skill requirements.

Career Awareness is the Cornerstone of Workforce Development

- Making sure the emerging workforce understands the current and emerging labor market
- Ensuring employers are partners in the process through activities like advising curriculum and providing job shadowing, mentoring, and internship opportunities
- Helping make sure educators, guidance counselors and parents have the tools to help the emerging workforce make informed decisions about the opportunities in the region





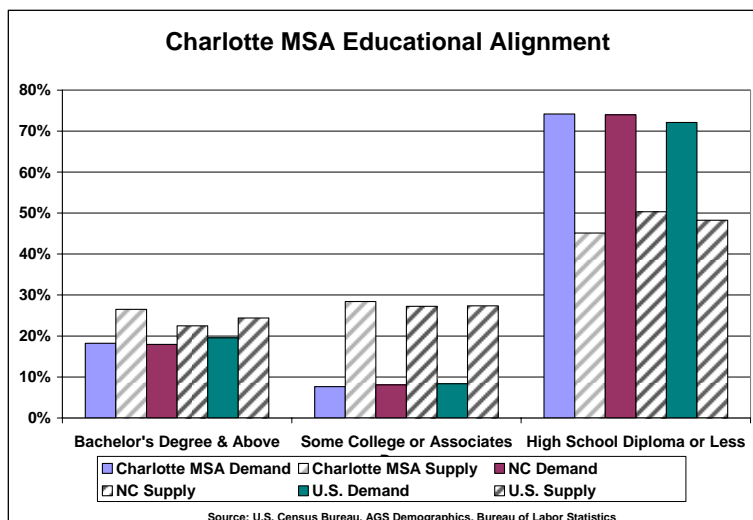
Effective career awareness helps to communicate the opportunities that exist outside the realm of the university track for students, drop-outs, graduates, and other adults. It also works to de-stigmatize and enhance appreciation for vocational and technical careers in the community. Awareness, however, should not be limited to the education community.

For any career awareness strategy to be effective, it must spread through the entire community – students, teachers, parents, and businesses. It needs to be a movement more than a “let’s talk about it” approach.

Often, an increase in unfilled positions in

high-skill, high-wage jobs is not a problem of an undersupply of college grads, but rather an undersupply of graduates with technical or vocational training. There is a misalignment in the Charlotte Region between the market demand and actual supply of these workers. This type of misalignment can be addressed through career awareness. In the Charlotte Region there are more workers with Bachelor’s degrees than jobs available, and there is a need for more vocational/technical workers to meet the market demands. The over supply of four-year degrees in the labor market is often the cause of underemployment, and can intensify negative trends such as the increasingly common “backwards transfer” – four-year degree holders enrolling in community college seeking technical skills training.

Helping youth to understand the current labor market conditions is critical to career awareness. Understanding which industries have been growing, and are projected to grow, helps to inform job-seekers where the jobs are and will be. Understanding the industry demand in the region leads to better career decisions. Currently there are several industries in the Charlotte Region that experienced growth over the last ten years (1993-2003), employ a large share of the current workforce, and are projected to grow in the future. It then follows that occupations in these industries are more secure.



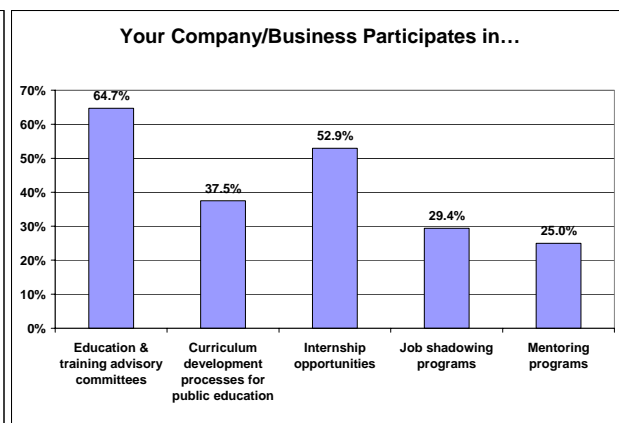
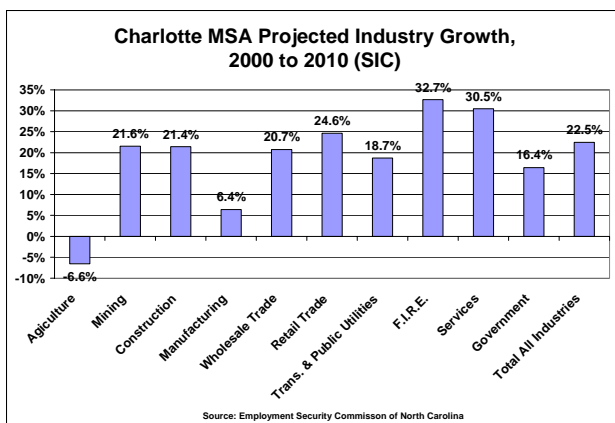


	Historical Growth (1993-2003)	Current Employment Share of Market (2003)
Construction	16.3%	6.2%
Manufacturing	-25.5%	12.9%
Wholesale Trade	16.1%	5.8%
Retail Trade	24.0%	10.7%
Transportation & Utilities	6.8%	4.6%
Information	36.5%	3.0%
Financial Activities	64.3%	8.4%
Professional & Business Services	54.6%	14.4%
Education & Health Services	48.6%	8.3%
Leisure & Hospitality	43.4%	8.6%
Other Services	80.3%	4.4%
Government	38.3%	12.7%

Source: Employment Security Commission of North Carolina

Connecting employers to career awareness will help to ensure that young adults are not preparing to spend their early years in the workforce moving from one low-wage, dead-end job to another, but rather launching careers with growth potential. **Employer involvement in career awareness will help promote the quality and quantity of jobs available in industries.** Employer involvement will also aid in applicable skill development, and help to strengthen the tie between work and school. Data gathered through the interviews and focus groups for this study shows that many employers around the region are participating in some type of career awareness program. However, employer participation is not consistent in form and there was no systemic approach or evidence of any large-scale career awareness programs.

With career counselors in high-school over-loaded with students and new career opportunities developing everyday, career awareness must be approached from





many angles. Employers can help counselors and educators focus on students' career interests by identifying career options and career objectives, as well as helping evaluate student aptitudes. To make informed decisions regarding post-secondary education and training possible, a partnership must exist between parents, educators, counselors, businesses and the public sector. A strong partnership helps youth see the relevance of academic skills as they are used in the workplace and gives meaning to concepts being learned. Ensuring a partnership exists between these groups will help the emerging workforce make practical and sustainable career choices based on an understanding of the current labor market and future possibilities.

Work-Readiness of Labor Force is Key to Employer Growth and Prosperity

The workplace is no longer hospitable to a worker with a static set of skills. The rapidly changing pace of the new economy means workers at all levels must have the core competencies to adapt and continually upgrade their skills. To support this new economy, the labor force, both current and emerging, must be work ready. Work readiness describes an individual's ability to obtain and retain employment. Work readiness encompasses existing skills and aptitudes for work, as well as the individual's potential to demonstrate increasing value to an employer. Skills and attributes that define work readiness include work behaviors and attitudes, self-analysis skills, interpersonal skills, and basic academic skills.

Below is a list of common or “core” skills that are in high demand and are transferable across sectors.

Cross-Sector Core Skills

- ✓ Project Management
- ✓ Task Management
- ✓ Problem Solving

Core Tech Curriculum

- ✓ Analytical Skills and Problem Solving
- ✓ Business Organization and Environment
- ✓ Coordination and Communication Skills
- ✓ Core Computer & Hardware Software Skills
- ✓ Project and Process Flows

Core Employability Skills

- ✓ Communication
- ✓ Organization
- ✓ Team Contribution and Leadership
- ✓ Professionalism
- ✓ Critical Thinking and Decision Making
- ✓ Customer Relations
- ✓ Self-Directed and Continuous Learning

The long-term impacts of developing work readiness will be to improve the likelihood of employment and self-sufficiency, in addition to supporting employer needs and business expansion, all of which are important to economic development.





Much like career awareness, there must be a partnership between business, education, community residents, and government. Business leaders and employers must be involved and articulate the job skills and issues facing their business in the fast-paced global economy. Educators must be involved to lend expertise on how to match education goals and resources with workforce needs. Community residents, including parents, can participate and provide perspective on how family support initiatives can help ensure a successful work readiness strategy. Local government leaders can convene the dialogue and help broker consensus on how to promote the strategies while addressing the challenges.

One suggestion is to consider how to integrate the list above into curriculum at all levels, not just postsecondary but secondary as well. Given that we are in a service based economy, it is startling to see how few schools across the nation have integrated some element of customer service training into their basic curriculum.

Bottom Line

Preparing our emerging workforce is “job one,” and developing greater career awareness is a key to developing a competitive workforce advantage. An emerging workforce that is informed of the opportunities in the Charlotte Region will quickly find a career and succeed in the workplace. However, developing career awareness involves more than supplying career information to high school students. It involves a perception change that recognizes the value of vocational and technical careers, and redefines youth’s view of a success. Successful careers are undoubtedly developed through four-year programs, but the trades and two-year degree programs lead to exceptional jobs as well. Promoting the quantity and quality of jobs in the region will help the emerging workforce make a more informed career choice, and develop and sustain the region’s competitive workforce advantage.

Just as important to maintaining a competitive advantage is actively supporting the region’s incumbent workforce. The region’s leaders must organize resources to ensure this segment of the workforce has skills and education that aligns with the needs of existing and potential employers in the region. A crucial aspect of this effort is to increase public understanding of the need for transferable skills and the ability to adapt to the fast pace of change in the workplace. The old economy is passing and the new economy demands new skill sets and the ability to be trained.

While we may be improving, our global competitors are far out pacing us and are leaving us behind. To paraphrase Thomas L. Friedman, in his book *The World Is Flat*, while other countries are running marathons, we are running sprints. We just are not doing enough and we are not doing it fast enough. We keep pecking around the edges. We need to be bold here or be left behind.





“Growing Your Own” Helps Offset Impacts of Global Change

Entrepreneurs can drive our next economy

The Charlotte Region faces tough competition in attracting new large employers, as well as confronting the national trend toward outsourcing in general and “off-shoring” in particular. The growth in the global marketplace means that almost any job – white or blue collar – can be moved to another country. Small business development and entrepreneurship may be a local economy’s best chance to insulate itself from the perils of outsourcing and off-shoring.

Nationally, small business is a consistent source of job growth and innovation. Small businesses in manufacturing, services, logistics, health care, information technology, and tourism play an integral role in economic development, and often receive a disproportionately small share of attention and resources regarding community vitality.

In the region, nearly three quarters of 40,000 plus private sector businesses (the number of private employers reporting in 3rd quarter 2003 for Charlotte MSA) employ less than 20 employees.¹² Over half of the region’s private sector employment is found in businesses that employ fewer than 100 people and nearly a quarter of the jobs are found in businesses employing 50 or fewer employees.¹³ This is just one piece of information that emphasizes the strategic and economic importance of small businesses, both to the existing and future economy.

Small business and entrepreneurship are a significant source of creativity and innovation. Entrepreneurs view change as a force of possibility rather than as a creator of problems. Although it can occur in very different situations, from start-ups to major employers, entrepreneurship has certain common elements. Creativity is at the heart it, encouraging and enabling entirely new ways of

In an intangible economy, concepts such as patents, copyrights, customer relationships, brand value, unique institutional designs, the value of future products and services, and their structural capital (corporate culture, systems, and processes) become ever more important to firms. Most of the value of the intangible economy is anchored to a firm’s stock of human capital and to the locations in which they exist.

— State Technology and Science Index, Milken Institute, 2004

¹² Employment Security Commission of North Carolina <http://eslmi12.esc.state.nc.us/>, number of private employers reporting in 3rd quarter 2003 for Charlotte MSA (does not include suppressed data based on confidentiality)

¹³ Employment Security Commission of North Carolina.

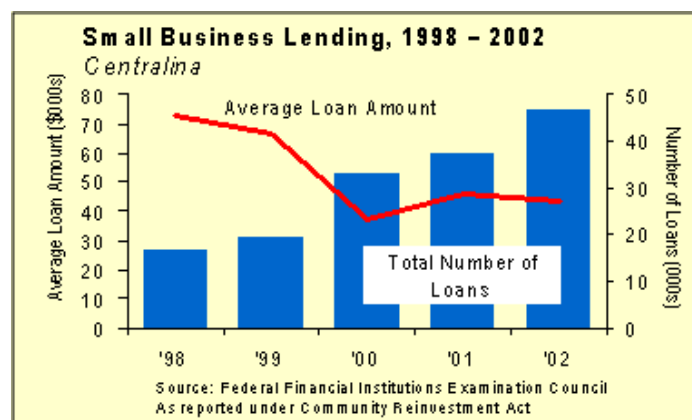
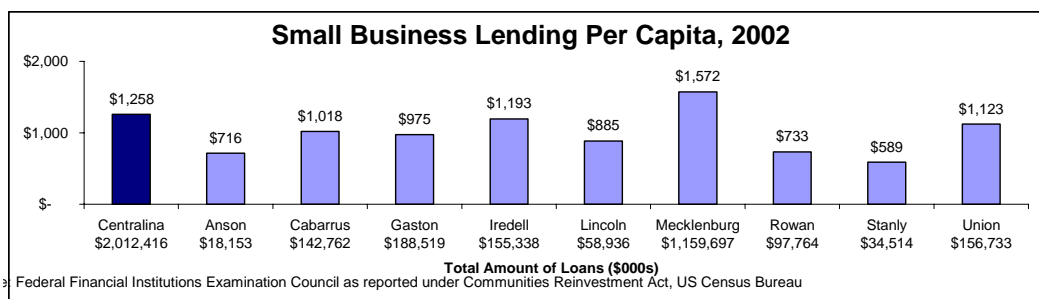




thinking and working. Entrepreneurs identify opportunities, large or small, that no one else has noticed. Entrepreneurs also have the ability to apply that creativity and effectively marshal resources to a single end.

Indicator	Charlotte MSA	Indianapolis MSA	Nashville MSA
Overall	30	29	32
Gazelles	3	18	34
New Publicly Traded Companies	36	35	23
Patents	37	15	49
Academic R&D Funding	48	49	31
Venture Capital	33	48	20

Source: New Economy Index, Progressive Policy Institute, <http://www.neweconomyindex.org/metro/index.html>





An entrepreneurial culture is more than pro-business; it embraces risk, innovation, and change. Entrepreneurs are classically depicted as rugged individualists who single-handedly build great companies. In reality, entrepreneurs are consummate networkers who thrive in communities that help support those networks. A key component of a region that fosters small business and entrepreneurialism is the pervasiveness of networks and the breadth of education, information, mentoring, and services that those networks provide.

Networks are essential because they link entrepreneurs to potential sources of new employees, strategic alliances, service providers such as lawyers, accountants and consultants, and most importantly, capital. Across the Charlotte Region, small business lending is varied, with the highest per capita lending in Mecklenburg, Iredell, Union, and Cabarrus counties. Through networks more entrepreneurs are gaining access to those funds. The number of small business loans was at a high in 2002, with over 40,000 total loans distributed.

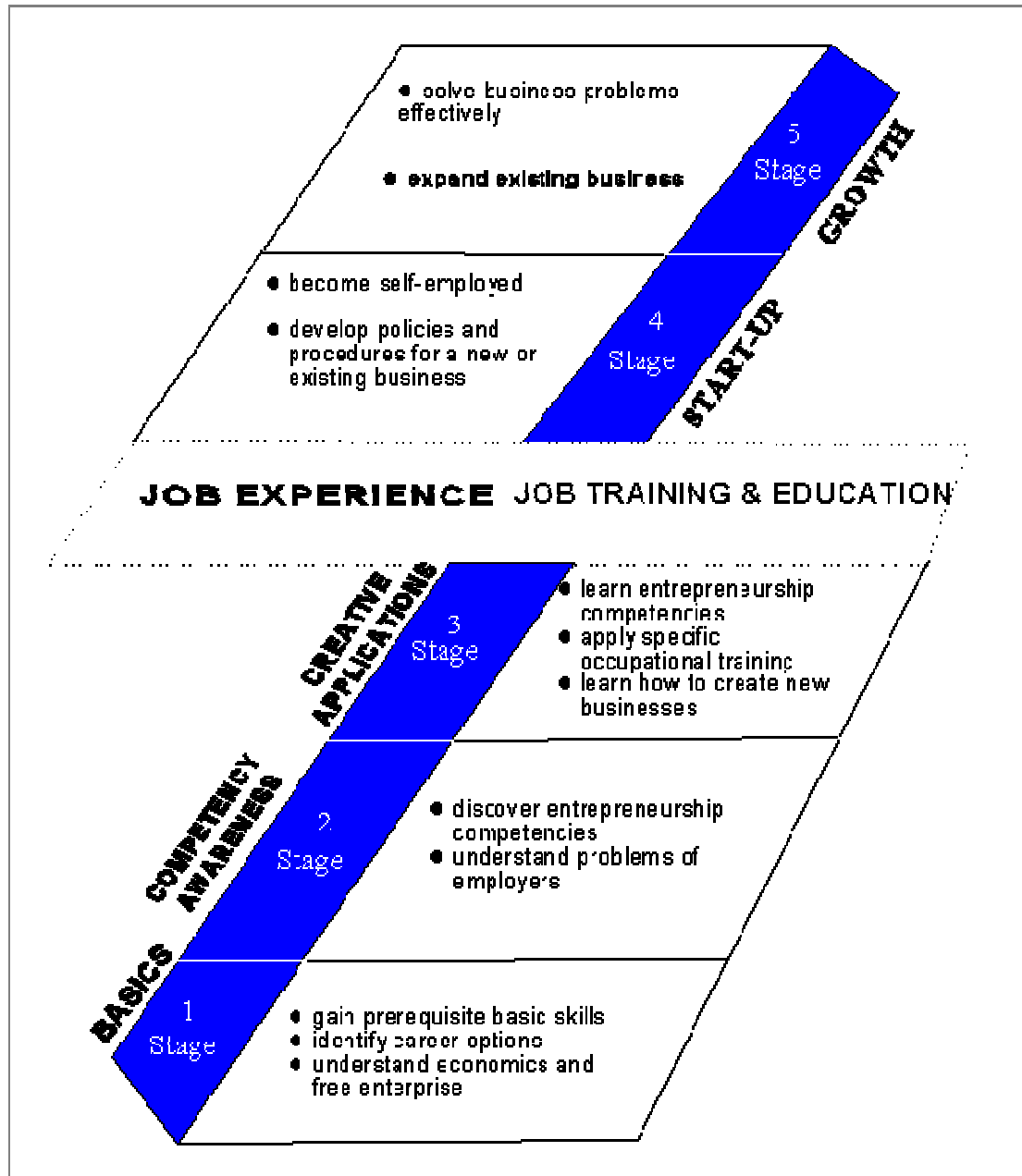
Gaining access to information such as availability of capital, assessments of markets, technology, and lessons learned from personal experience, is vital to spreading entrepreneurship in the region.

The Consortium for Entrepreneurship Education in Columbus, Ohio has developed a **Lifelong Entrepreneurship Education Model**, shown on the next page, that has been adapted by a wide range of education, workforce, economic, and community development entities around the country. This model is structured around five distinct stages of business development – Basics, Competency Awareness, Creative Applications, Start-up, and Growth. Specific levels of skill acquisition and experience associated with each stage are defined, but with flexibility in methodologies and outcomes. The Lifelong Entrepreneurship Education Model is geared primarily toward high school and college-level entrepreneurship programs, but its basic framework lends itself to adaptation by other entities as well.





Lifelong Entrepreneurship Education Model



Developed by The Consortium for Entrepreneurship Education, Columbus, OH





Bottom Line

Fostering the next generation of innovators is critical to this region's competitiveness in the global economy. At the heart of innovation and job creation is small business and entrepreneurship. Promoting the growth of small business and supplying the knowledge and means to entrepreneurs is a significant role regional leadership can play to support innovation and job creation. Coordinating education, workforce, and community resources to promote small business and entrepreneurial opportunities may be one of the most effective approaches to attract younger workers to the region and provide new employment opportunities for the region's mature workforce.

In our many conversations with regional leadership, entrepreneurship was on everyone's mind. It was a focal point of our interviews and dominated many conversations. While everyone had a high amount of interest, we found that there isn't a coordinated strategic planning effort across the region to foster its development. A regional vision for entrepreneurial development could position the region as the national leader and to become a magnet for the creative types and innovators. We cannot afford to just let it happen on its own time, it is time to push it forward. Leadership in the region can do this.





What Goes Around, Comes Around

Transportation decisions define the Region's labor shed

If the old adage is true that “what goes around, comes around” then it is time to circle back to our first section on growth and stability. As the population grows, so do the challenges on infrastructure. This is perhaps nowhere more visible than on the roads, through either increased congestion or road construction.

The transportation system is an important component of the regional workforce and economy. Time, effort and aggravation regarding the commute to work is one factor in people’s decision of where they live and work. When transportation systems are efficient, they provide economic and social opportunities and benefits that have impacts throughout the economy and the economy is more fluid. When transportation systems are inefficient, they can have an economic cost of reduced or missed opportunities, and economies are framed based on whether workers will or will not commute.

Transportation is closely linked to economic and workforce development. Throughout the leadership and employer interviewing process, participants cited the importance of improving the transportation infrastructure to support economic development as well as having access to the larger portion of the labor market. Improving the transportation system provides both employer and labor force benefits. Benefits include reduced travel times, lower fuel consumption and associated costs, increased reliability, and improved safety in the movement of goods and people. Besides the inherent value of faster shipping at lower costs, businesses benefit from access to a larger labor pool, and individuals can benefit from increased employment opportunities as their potential commuting area expands.

Supporting the regional approach to workforce development are the commuting patterns, which illustrate a shared labor pool among the counties in the region. Some counties have over 30% of their workers leaving their county of residence to work elsewhere in the region (the effect of the open market place of skills). An effective transportation infrastructure helps to support a shared labor market where each county can benefit from labor strengths in the region.

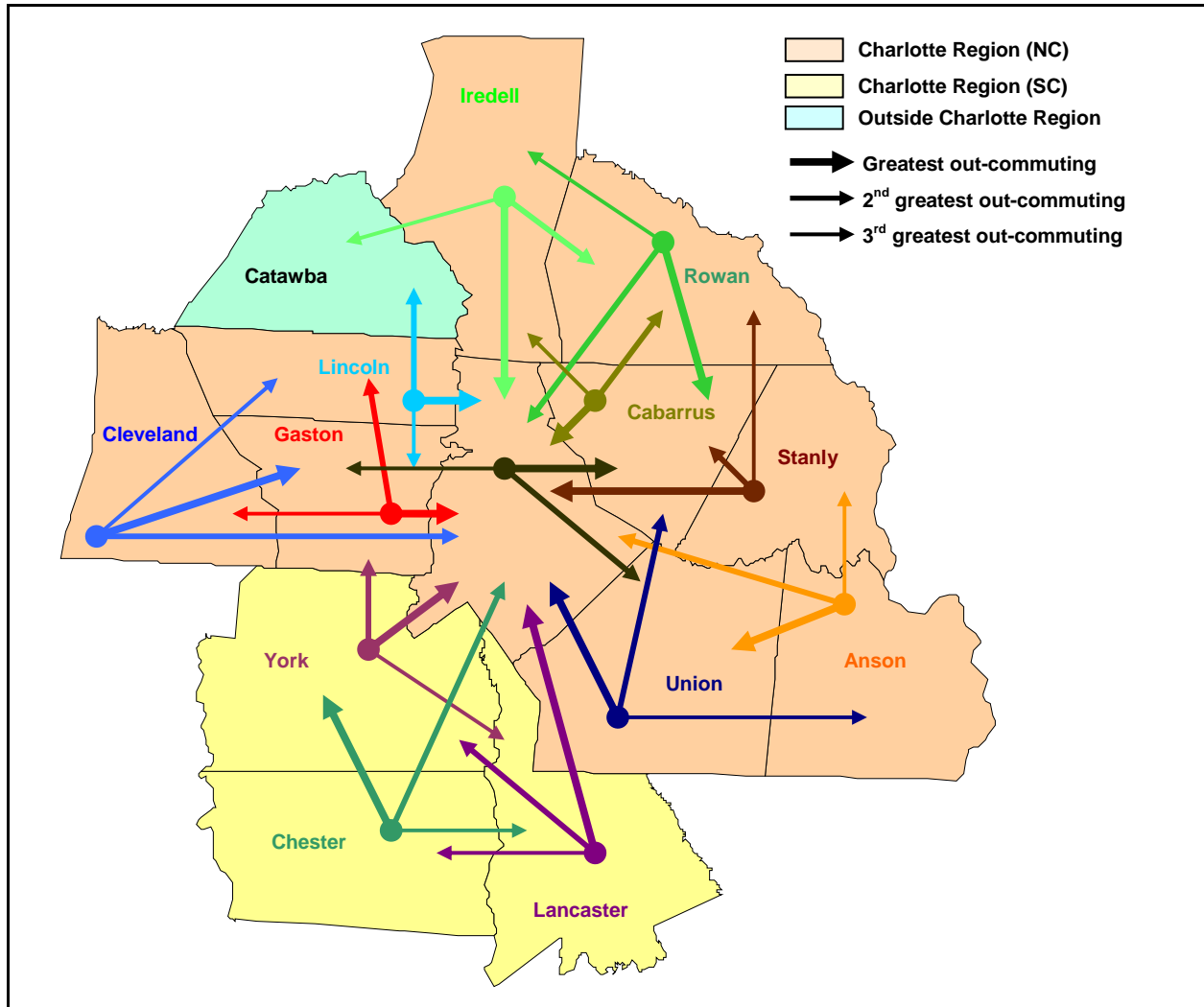
As a growing urban area, the transportation system must support suburban commuters into the city of Charlotte and surrounding sub-labor markets. Mecklenburg and South Carolina’s York County are the only counties in the region that experience a net gain in workers from in-bound commuters. The





suburban residents of the region are taking to highways and public transit to come into the city of Charlotte and Rock Hill for work. As suburban communities expand, there will be more need for effective transportation to reduce congestion and reach the outer suburbs. As housing expands outside of Charlotte, it will support job creation in several industries. For service and entry-level employees with limited mobility options, transit is a key link to suburban-based jobs.

Top Workplace Destinations from County of Residence



Source: U.S. Census Bureau: 2000 County-to-County Worker Flow





Commuting Patterns	Anson	Cabarrus	Chester	Cleveland	Gaston	Iredell	Lancaster
% Out-Commuting	38.7%	46.3%	36.7%	29.5%	35.2%	30.0%	25.8%
Out-Commuting	3,688	30,176	4,698	12,376	30,577	17,884	5,758
In-Commuting	1,193	20,948	3,232	6,072	15,340	12,600	4,192
Net Gain in Workers	-2,495	-9,228	-1,466	-6,304	-15,237	-5,284	-1,566

Commuting Patterns	Lincoln	Mecklenburg	Rowan	Stanly	Union	York
% Out-Commuting	51.6%	6.8%	32.0%	31.3%	45.2%	6.1%
Out-Commuting	16,251	24,071	19,160	8,536	26,920	3,107
In-Commuting	5,626	108,257	13,983	3,577	9,343	7,400
Net Gain in Workers	-10,625	84,186	-5,177	-4,959	-17,577	4,293

Source: US Census Bureau

Overall, the transportation system and general infrastructure must support the growth the region has experienced. Labor force growth is outpacing job growth in certain counties, and connecting labor supply to industry demand is important to establishing and sustaining stable growth. Several community development connections are made through transportation; getting employees to employers, expanding county assets to promote as regional strengths, providing business with a work-ready labor force to foster growth and innovation, as well as supporting the growth and stability of the region.

Charlotte Region Second Worst in Traffic Congestion

A recent annual study by the Texas Transportation Institute, and reported in the Charlotte Observer, identified Charlotte as the country's second most congested mid-size city, with the average traveler wasting 43 hours a year stuck in traffic. Austin, Texas is first with 51 hours annually. The City of Los Angeles is the worst city regardless of size (93 hours a year); Raleigh is at 27 hours, and Atlanta is at 67.

As recently as 1989, Charlotte roads were relatively free-flowing, with only 19 hours of delays annually. However, the number of commuters has jumped 95% since 1989. In addition, since 1982, the number of miles driven nationally has increased by 74%, while new construction has only added a mileage increase of 6% to the roadways.

The Charlotte Observer reports that ridership on the Charlotte Area Transit System buses increased 31% between 1998 and 2003. The Texas Transportation Institute suggests that if buses stopped running, highway delays in the Charlotte area would increase an aggregate of 2.1 million hours annually.





Bottom Line

In order to help sustain growth over time, the region must make strategic decisions to invest in developing counties that are lagging behind in economic vitality, so that transportation costs are reduced, economic strength is built throughout the region, and local labor force participants have the opportunity to decide whether to stay closer to home based on new employment opportunities, or to continue to travel congested roads towards the major employment centers of the region.

As the workforce reacts to congestion and longer commutes, businesses react to increased transportation costs and lost work hours. The transportation issue has implications on both the supply and demand side of the economic landscape. There have already been cities that have had to deal with shrinking labor sheds and the loss of prospective businesses. Cities from Atlanta to Seattle must deal with their congestion issues while the transportation problem is at its peak. The Charlotte Region's transportation issue is becoming greater and now is the time to act. Transportation is a thread that binds several aspects of workforce development. Without action and strategic planning around transportation issues, a workforce development strategy is destined to fail.





A Last Thought

Another twist on “what goes around, comes around,” can be found in the North Carolina Progress Board report NC 20/20 2001:

A good quality of life is related to a good wage.

A good wage depends on a good job.

Good jobs are dependent on a strong, diversified economy.

A strong economy is dependent on a high quality education.

Quality education depends on healthy children and families.

Healthy children and families depend on vibrant communities!

This report has tried to demonstrate that there are many factors that contribute to the success of a region – strengths and weaknesses, opportunities and disappointments, workforce and economic development. None, however, is more important than preparing our human capital to take on the challenges of the 21st century.





Characteristics of Successful Communities

Communities that have made progress in coordinating economic, education, and workforce development activities have tended to share some common essential characteristics. These characteristics can provide a useful framework for planning by the Charlotte Regions' leadership.

- ◆ **There is a high degree of coordination among organizations responsible for economic and workforce development activities.** Organizations responsible for economic and workforce development activities have developed common objectives and strategic plans. The objectives and strategic plans specify how activities of each organization will be mutually complementary.
- ◆ **The business community endorses and participates in coordination.** The coordinated efforts of economic and workforce activities are responsive to and valued by the business community. Successful initiatives are consistently responsive to the needs of businesses, although the initiatives are not necessarily business-led.
- ◆ **The political will to make hard decisions is evident.** The type and degree of restructuring necessary to build a system that aligns economic and workforce development activities is often disruptive to the status quo. In nearly every community attempting restructure, initiatives have succeeded in large part because community leaders had the political will to push for change.
- ◆ **Coordination efforts involve a broad range of industries.** Often, one objective of aligning workforce development with the private-sector objectives of economic development is to address issues related to both urban and rural issues. Successful initiatives target economic development recruitment in a broad range, both urban and rural, so the regional economy can better provide jobs at a variety of skill levels.



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