

**Workforce Investment Board of Merced County  
Program Planning and Development Committee  
Dept of Workforce Investment – Large Conference Rm  
1880 W. Wardrobe Avenue, Merced, CA  
Thursday, April 28, 2005, 3:00–4:30 p.m.  
Meeting Agenda**



[www.co.merced.ca.us/wi/wib/wib.html](http://www.co.merced.ca.us/wi/wib/wib.html)

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1. Call to Order and Roll Call .....
  2. Approve Agenda .....
  3. Approve Minutes (March 23, 2005) .....
  4. Public Opportunity to Speak .....
  5. Action Agenda .....
    - a. Selection of Industry Cluster ..... Dave Davis
  6. Chair’s Comments .....
  6. Next Meeting Date/Time—May 26, 2005, 3:00-4:30 p.m., Dept of WI, 1880 W. Wardrobe Ave/Large Conf Rm .....
  8. Adjourn .....

“Merced County’s Workforce Investment System will keep pace with new growth, the emerging economy, and the ever-changing needs of the employers by creating a better educated, highly skilled workforce, that’s capable, prepared, and thoroughly knowledgeable.”

**Workforce Investment Board  
Program Planning and Development Committee  
Merced Chamber of Commerce Conference Room  
690 W. 16th Street, Merced, CA  
March 23, 2005, 3:00 – 4:30 P.M.  
Meeting Minutes**

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**Members Present:** Andrea Baker, Nicholas Benjamin, Don Bergman, Ernie Flores, Phil Flores, Peter Fluetsch (Vice Chair), Carol Greenberg, Mike Sullivan (Chair), Thomas Tsubota

**Members Absent:** Sharon Cresswell, John Fowler, Scott Galbraith, Anne Newins, Al Romero

**Others Present:** Dave Davis, Dee Knight, Joanne Presnell

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- 1. Call to Order and Roll Call:** The Chair called the meeting to order at 3:07 p.m. A sign-in sheet was used in lieu of roll call.
- 2. Agenda:** It was *M/S/C Fluetsch/P. Flores* to approve the agenda as published.
- 3. Approve Minutes (February 23, 2005):** It was *M/S/C Bergman/Baker* to approve the February 23, 2005 minutes as written.
- 4. Public Opportunity to Speak:** Ms. Andrea Baker noted congratulations were in order for Central Valley Opportunity Center, which received a portion of the Governor's 15% Grant money to operate a One-Stop Mobile Unit that will travel in three counties—One-Stop partners are welcome to be on the Mobile Unit. It will be servicing migrant camps and other remote sites.

The Department of WI received \$683,616 of the Governor's 15% Grant money for training, which will be used over a two-year period.

**5. Action Agenda:**

**a. Committee Meeting Day/Time Change:** Staff noted the 4<sup>th</sup> Wednesday of each month was inconvenient for the incoming committee Chair. After surveying committee members, it was determined the 4<sup>th</sup> Thursday was the best day for everyone.

It was *M/S/C E. Flores/Benjamin* to change the meeting day to the 4<sup>th</sup> Thursday of each month, and the time would stay the same—3:00-4:30 p.m.

**b. Selection of Industry Cluster:** Staff noted the Workforce Investment Board (WIB) Economic Development Action Team selected the eight identified industry clusters, and they correspond with Goal 1 of the WIB. The following suggestions were made in order to identify and select the right industry cluster:

- 1) Give a specific meaning; i.e., type of position(s)/trade needed for each cluster. Look at the Merced County Economic Development Strategic Plan for definitions.
- 2) Prioritize the clusters by most needed in the County, and give specific technologies needed for each.
- 3) Concentrate on the higher-up positions of the clusters.
- 4) Look at other successful WIB's projects, and how they were accomplished.

Staff will gather the above information and present it at the April 28, 2005 meeting.

**6. Chair Comments:** None.

**7. Next Meeting Date/Time:** The next meeting is April 28, 2005, 3:00-4:30 p.m., Dept of Workforce Investment, 1880 W. Wardrobe Ave, Merced.

**8. Adjourn:** The meeting adjourned at 3:45 p.m.

Minutes prepared by Devilla D. Knight.

**TO: Program Planning & Development**

**DATE: 04/28/05**

**FROM: WIB Staff**

**For Action**

**For Information**

**For Discussion**

**SUBJECT: Selection of “Industry Cluster”**

**PROPOSED MOTION(S): Continue the process to select an industry cluster for a pilot project to begin work on the Workforce Investment Board’s (WIB) Strategic Goal 1.**

**DISCUSSION: WIB Goal 1: Train and attract adaptable workers to fill industry needs.**

- **Focus initially on a single industry; do a pilot project which will focus on understanding and addressing its needs.**
- **Develop a focus group for that industry to identify needs.**
- **Formulate a plan to address the needs of that single industry.**
- **Implement the plan.**

**ATTACHMENT(S):**

- 1. Partnering on Economic Development**
- 2. Industry Clusters**

Attachment 1: Information taken from April 12 teleconference and hosted by Greg Newton Associates.

**Workforce Board Leadership:**

**Partnering on  
Economic  
Development:**

**Creating the  
Workforce Advantage**

# **Workforce Development for Economic Development**

## **Why target?**

- **Know What for Whom**
- **Resource Limitations**
- **Not all Equal**
- **Not all Want/Need**
- **Better Serve Some**
- **Synergy**

## **When you target, you:**

- **Seek Partners and Customers**
- **Give Special Attention**
- **Gain Specific Knowledge**
- **Align to Respond**
- **Reorganize your services**
- **Allocate Resources**

## **You can target by ...**

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### **The supply side...**

- **Job Seekers**
- **Employment Goals**

### **The demand side...**

- **Econ Develop Links**
- **Industry Clusters**
- **Common Skills**
- **HR Capacity**

## **High-Growth Job-Training Initiative National Targeting Criteria:**

- **Add substantial numbers of new jobs to the economy; or**
- **Have a significant impact on the economy overall; or**
- **Impact the growth of other industries; or**
- **Are being transformed by technology requiring new skill sets for workers; or**
- **Are new and emerging businesses that are projected to grow.**

## **The Twelve Sectors Targeted ...**

- **Health Care**
- **Biotechnology**
- **Automotive**
- **Manufacturing**
- **Transportation**
- **Financial Services**
- **Information Tech**
- **Geospatial Tech**
- **Retail**
- **Construction**
- **Hospitality**
- **Energy**

## **Industry Clusters:**

**Competing, complementary, or interdependent firms and industries that do business with each other and or have common needs for talent, technology, and infrastructure.**

**Industries in a cluster share buyers, suppliers, processes, and technology. Cluster industries utilize the same set of skills and tap into the same knowledge base and workforce in an area.**

## **Targeted Industry Clusters:**

- **Greatest potential for wealth creation**
- **Return exceeds investment**
- **Not just a laundry list**
- **Emphasis, not exclusivity**
- **Cluster assistance aids all components**
- **Common response for common good**

Attachment 2

Industry Clusters

**WIB**

**Merced County Economic Development  
Strategic Plan, March 2003**

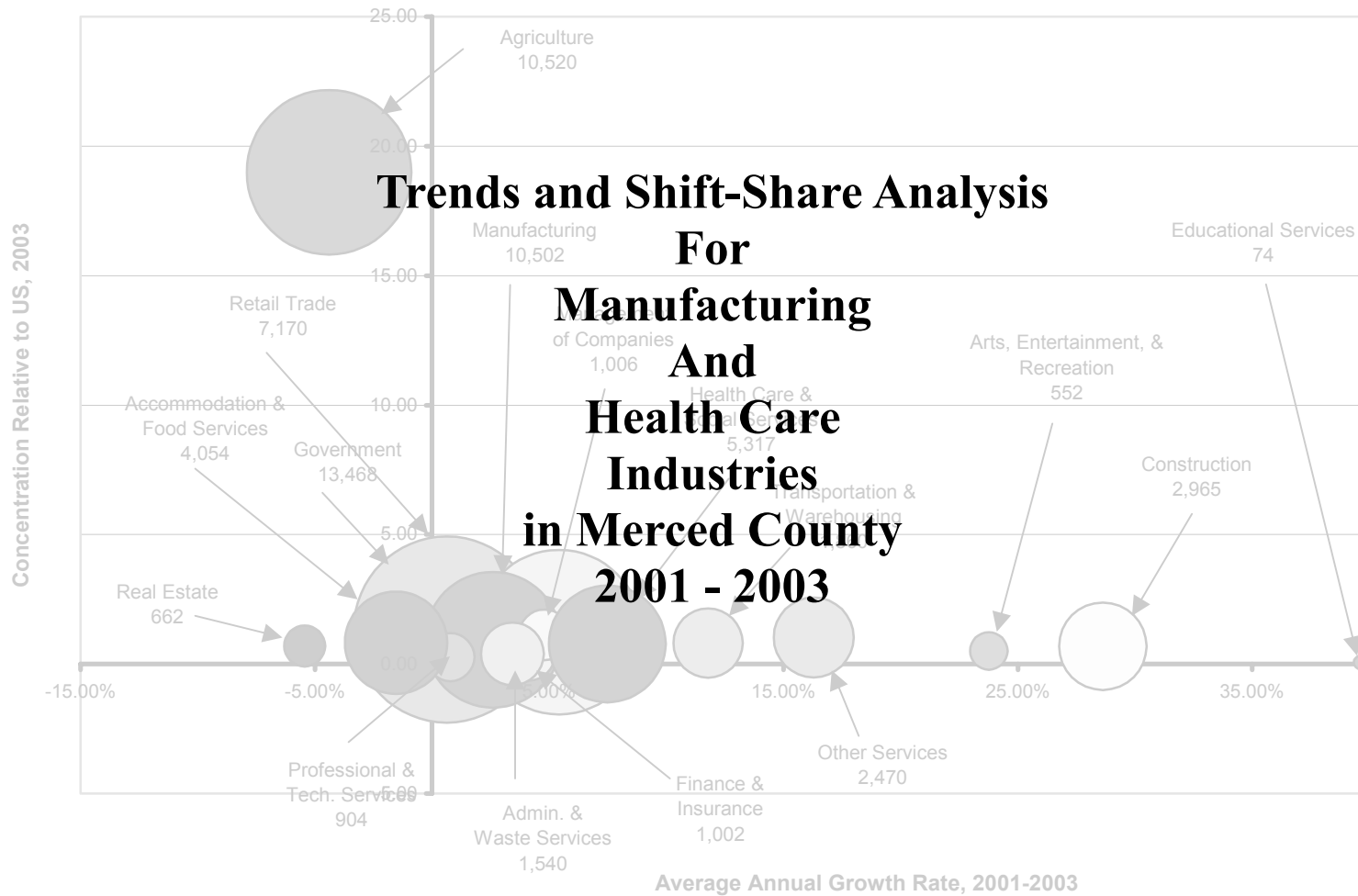
- |  |  |
|--|--|
| 1. Healthcare & Education                            | 1. Health  |
| 2. Business Services                                 | 2. Information Technology & Tele-services  |
| 3. Agriculture / Food Processing                     | 3. Agriculture & Food Processing<br>(include Organic)  |
| 4. Wood/Metal Fabrication                            | 4. Manufacturing (Including Wood<br>products, Fabricated Metal Products,<br>Transportation Equip)  |
| 5. Tourism, Visitor Services,<br>and Hospitality     | 5. Visitors & Tourism  |
| 6. Warehouse Distribution                            | 6. Warehousing & Distribution  |
| 7. Construction/Materials,<br>And Ancillary Services | (Not Addressed)  |
| 8. Childcare   | (Not Addressed)  |
|  | 7. Environmental (including analytical<br>services, consulting/engineering services,<br>recycling services, waste management<br>services, remediation services |
|  | 8. Software, E-Commerce, Information<br>Technology   |
|  | 9. Electronics   |

**Industry Clusters:**

Competing, complementary, or independent firms and industries that do business with each other and/or have common needs for talent, technology, and infrastructure.

Industries in a cluster share buyers, suppliers, processes, and technology. Cluster industries utilize the same set of skills and tap into the same knowledge base and workforce in an area.

Growth, Employment Size, and Concentration to U.S. (Location Quotient)  
for All Sectors, Merced County 2001-2003



**Trends and Shift-Share Analysis for Manufacturing and the Health Care and Social Services in Merced County 2001-2003**

**Manufacturing**

Manufacturing employment grew an average 1.3 percent per year and over the 2001-2003 period expanded by 5.4 percent in Merced County. Total employment in this sector was 10,502 in 2003.

This sector is divided into Nondurable Goods and Durable Goods. For Merced County, Nondurable Goods includes the sub-sector Food Manufacturing with industrial groups Fruit and Vegetable Product Manufacturing and Dairy Product Manufacturing with reportable data. An obvious exclusion from this sub-sector is the suppression of data in Animal Slaughtering and Processing due to confidentiality. The sub-sectors within Durable Goods, are Wood Product Manufacturing, Fabricated Metal Product Manufacturing, Machinery Manufacturing, Transportation Equipment Manufacturing, Furniture and Related Product Manufacturing and Miscellaneous Manufacturing.

Employment in Nondurable Goods increased an average 7.5 percent per year and grew by 19 percent, or 1,096 jobs, over the 2001-2003 period. Fruit and Vegetable Product Manufacturing and Dairy Product Manufacturing both showed respectable gains over this time period, with 14.5 and 26.3 percent, respectively.

Durable Goods didn't fair as well as Nondurable goods over the 2001-2003 time period, with employment decreasing an average of -8.5 percent per year or shrinking -11.2 percent over three years. The largest contribution to this decline came from the sub-sectors Fabricated

Metal Product Manufacturing and Machinery Manufacturing with employment dropping 48.8 and 33.5 percent, respectively. The sub-sector, Transportation Equipment showed a gain in employment of 8.3 percent or 33 jobs.

**Location quotients (LQ)** allow us to categorize our local industries based on their degree of concentration in our county, and whether or not that concentration is growing. It also identifies the industries that are self-sufficient (LQ > 1.00 ), or exporting industries, (LQ > 1.25), or an importing industry (LQ < 0.75).

**LQ low and declining:** Relative to the national average, these sub-sectors have a low share of manufacturing employment in Merced County and that share appears to be declining. These are probably the weakest sectors in Manufacturing:

	LQ	Chg. in LQ 01/03
Wood Product Manuf	0.94	-0.10
Fabricated Metal Products	0.39	-0.28
Machinery Manuf.	0.22	-0.42
Furniture/Related Manuf.	0.25	-0.09

**LQ low and increasing:** These industrial groups have low concentrations of employment, relative to the national share of employment, however their concentration is increasing. Keep an eye on these industries, as they may be important sources of growth and tomorrow's leading sectors.

	LQ	Chg. in LQ 01/03
Transportation Equip. Manuf.	.44	0.13

**LQ high and declining:** These industries have high employment concentrations relative to the U.S. economy, however their concentrations are declining. While these may have been the former leading sectors of our economy, their decline suggests that they should either be subsidized and strengthened or replaced with new leading industries.

No industries to list.

**LQ high and increasing:** These are the high flyers of our local manufacturing sector, with high and growing concentrations of employment relative to the national economy. Economic strategy should focus on maintaining a policy environment conducive to continued high performance by these industries

	LQ	Chg. in LQ 01/03
Fruit and Vegetable Products	25.5	0.18
Dairy Product Manuf.	14.6	0.21

**Shift-Share Analysis** of employment gives us the ability to separate local employment growth factors from national employment growth factors and gain a better understanding of our local economy. The analysis is primarily used to decompose employment changes within a region over a specific period of time into growth that is attributed to growth of the national economy; growth that is attributed to the mix of faster or

## Trends and Shift-Share Analysis for Manufacturing and the Health Care in Merced County 2001-2003

slower than average growing industries; and growth that is attributed to the competitive nature of the local industry. National Growth Share measures the number of jobs created locally due to national economic trends. Industrial Mix Share measures whether the local industry is weighted toward industries that are growing faster or slower than the national average. Local share or Regional shift helps to measure whether local industries are growing faster or slower than similar industries at the national level, or it may answer whether local businesses are more or less competitive than the national average. We will separate the industries in Manufacturing, into two categories, Advantage Industries (competitive) and Disadvantage Industries (uncompetitive) using the Local share.

### **Advantage Industries in Manufacturing**

Food Manufacturing

Fruit and Vegetables Products Manufacturing

Dairy Product Manufacturing

Transportation Equipment Manufacturing

### **Disadvantage Industries in Manufacturing**

Wood Product Manufacturing

Fabricated Metal Product Manufacturing

Machinery Manufacturing

Furniture and Related Product Manufacturing

Over all, as we combine the LQ with the shift-share, we can see that the Food Manufacturing sector, with its industrial groups, and Transportation Equipment Manufacturing have the greatest opportunity of increasing our local employment. Keep in mind, however, that this is a descriptive tool rather than a diagnostic tool. The shift-share analysis does not tell us why

some local industries are more competitive or not. Potential factors could include access to natural resources, local wage rates, workforce productivity or regional transportation networks. Also, adding your own qualitative information to the quantitative data will add to this analysis.

### **Health Care and Social Services**

Health Care employment grew an average 3.8 percent per year and over the 2001-2003 period expanded by 7.48 percent in Merced County. Total employment in this sector was 5,317 in 2003.

For Merced County, Health Care includes the sub-sector Ambulatory Health Care Services with industrial groups Offices of Physicians, Offices of Dentists, Offices of Other Health Practitioners, and Outpatient Care Centers with reportable data. Nursing and Residential Care Facilities is another sub-sector within this sector and includes the industrial groups Nursing Care Facilities, Residential Mental Health Facilities, Community Care Facilities for the Elderly.

Employment in the sub-sector Ambulatory Health Care Services increased an average 4.3 percent per year and grew by 11.6 percent, or 202 jobs, over the 2001-2003 period. This sub-sector has the bulk of sector share with 36.5 percent of employment in 2003. The largest industrial group within this sub-sector is Offices

of Doctors with 907 jobs and an 13.8 percent growth rate over the 2001 - 2003 period. Offices of Dentists holds 7.4 percent sector share and grew 5.3 percent from 2001 to 2003. Offices of Other Health Practitioners out grew all other industrial groups in this sector with an increase of 14.7 percent, although it holds 4.8 percent of sector share. Outpatient Care Centers has a sector share of 2.4 percent and employment grew 5.0 percent during this period.

Nursing and Residential Care Facility's sector share of employment, in this sub-sector, was 23.4 percent in 2003. Growth over the 2001 - 2003 period was 9.6 percent. Nursing Care Facilities holds the largest sector share of employment with 10.8 percent. Data for 2001 was suppressed for this industrial group and growth for this period was not computed. Data was also suppressed for the industrial group Other Residential Care Facilities. Community Care Facilities for the Elderly, with a 5.7 percent sector share, grew 6.4 percent. Residential Mental Health Facilities posted a decline of 48.8 percent over the 2001 - 2003 period, losing 197 jobs.

**Location quotients (LQ)** definitions of the locations quotient can be found in the Manufacturing section of this report.

**LQ low and declining:** Relative to the national average, these industrial groups have a low share of Health Care employment in Merced County and that share appears to be declining. These are probably the weakest sectors in Manufacturing:

**Trends and Shift-Share Analysis for Manufacturing and the Health Care and Social Services in Merced County 2001-2003**

	LQ	Chg. in LQ 01/03
Outpatient Care Centers	0.57	-0.07
Ambulatory Health Care Serv.	0.78	-0.01
Residential Mental Health Fac.	0.83	-0.54

**LQ low and increasing:** These industrial groups have low concentrations of employment, relative to the national share of employment, however their concentration is increasing. Keep an eye on these industries, as they may be important sources of growth and tomorrow’s leading sectors.

	LQ	Chg. in LQ 01/03
None to list		

**LQ high and declining:** These industries have high employment concentrations relative to the U.S. economy, however their concentrations are declining. While these may have been the former leading sectors of our economy, their decline suggests that they should either be subsidized and strengthened or replaced with new leading industries.

	LQ	Chg. in LQ 01/03
Offices of Dentists	1.02	-0.05
Offices of Other Health Pract.	.98	-0.01
Community Care Facilities for the Elderly	1.03	-0.10

**LQ high and increasing:** These are the high

flyers of our local manufacturing sector, with high and growing concentrations of employment relative to the national economy. Economic strategy should focus on maintaining a policy environment conducive to continued high performance by these industries

	LQ	Chg. in LQ 01/03
Offices of Physicians	0.87	0.03

Nursing Care Facilities and Other Residential Care Facilities are not listed above. Data was suppressed for those industries.

**Shift-Share Analysis** of employment gives us the ability to separate local employment growth factors from national employment growth factors, thus gaining a better understanding of our local economy. The analysis is primarily used to decompose employment changes within a region over a specific period of time into growth that is attributed to growth of the national economy; growth that is attributed to the mix of faster or slower than average growing industries; and growth that is attributed to the competitive nature of the local industry. National Growth Share measures the number of jobs created locally due to national economic trends. Industrial Mix Share measures if the local industry is weighted toward industries that are growing faster or slower than the national average. Local share or Regional shift helps to measure whether local industries are growing faster or slower than similar industries at the national level, or it may answer whether local businesses are more or less competitive than the

national average. We will separate the industries in Health Care into to categories Advantage Industries (competitive) and Disadvantage Industries (uncompetitive) using the Local share.

**Advantage Industries in Health Care**

- Ambulatory Health Care Services
- Office of Physicians
- Offices of Dentists
- Offices of Other Health Practitioners
- Nursing and Residential Care Facilities

**Disadvantage Industries in Health Care**

- Residential Mental Health Facilities
- Community Care Facilities for the Elderly

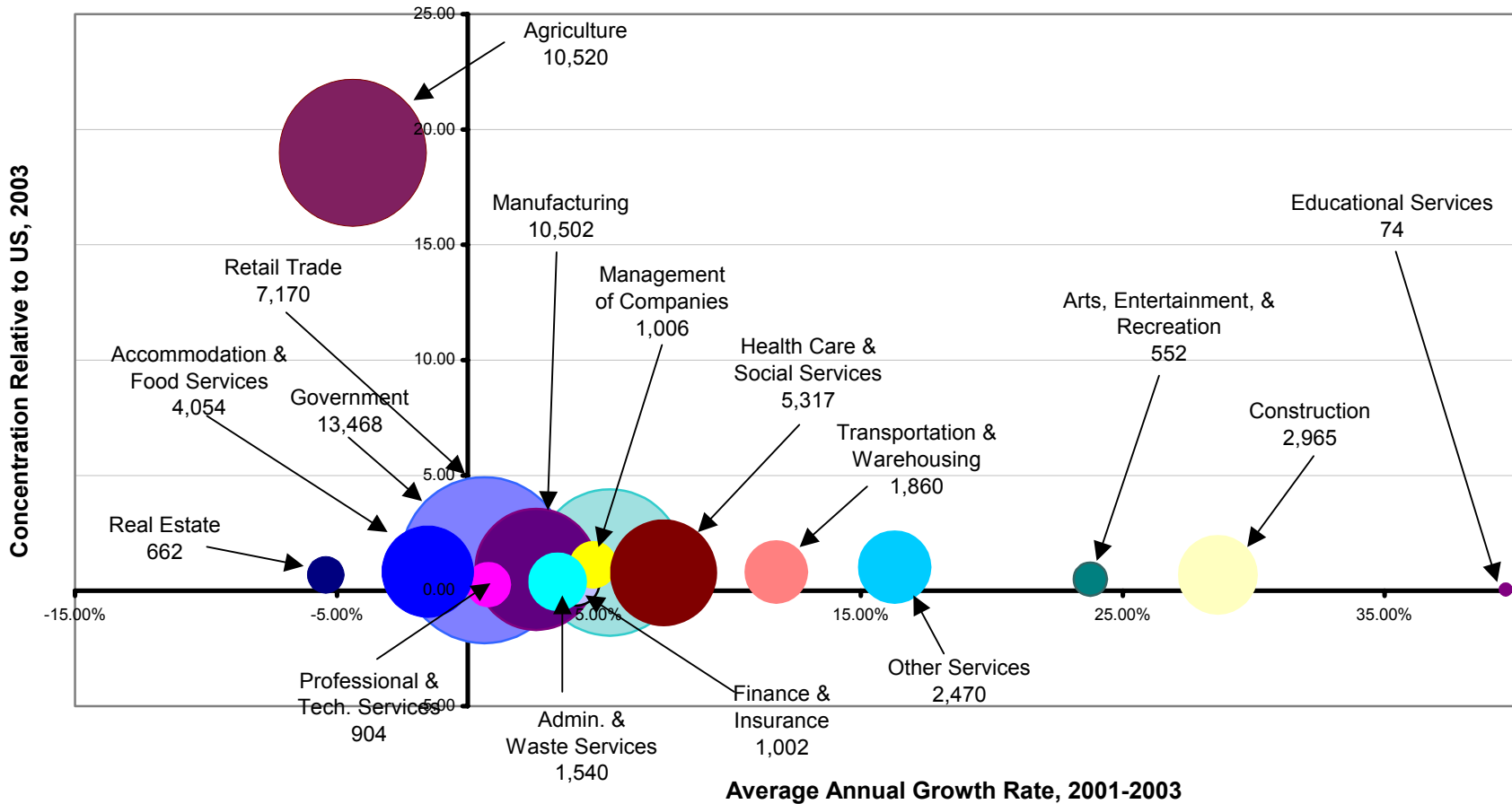
**Industries not listed above for Health Care**

- Nursing Care Facilities (data suppression)
- Other Residential Care Facilities (data suppression)
- Office of Dentists (border line industry)
- Outpatient Care Centers (border line industry)

Over all, as we combine the LQ with the shift-share, we can see that Residential Mental Health Facilities and Community Care Facilities for the Elderly have the least opportunity of increasing our local employment in the Health Care sector. Offices of Physicians offers Merced County the greatest increase in employment.

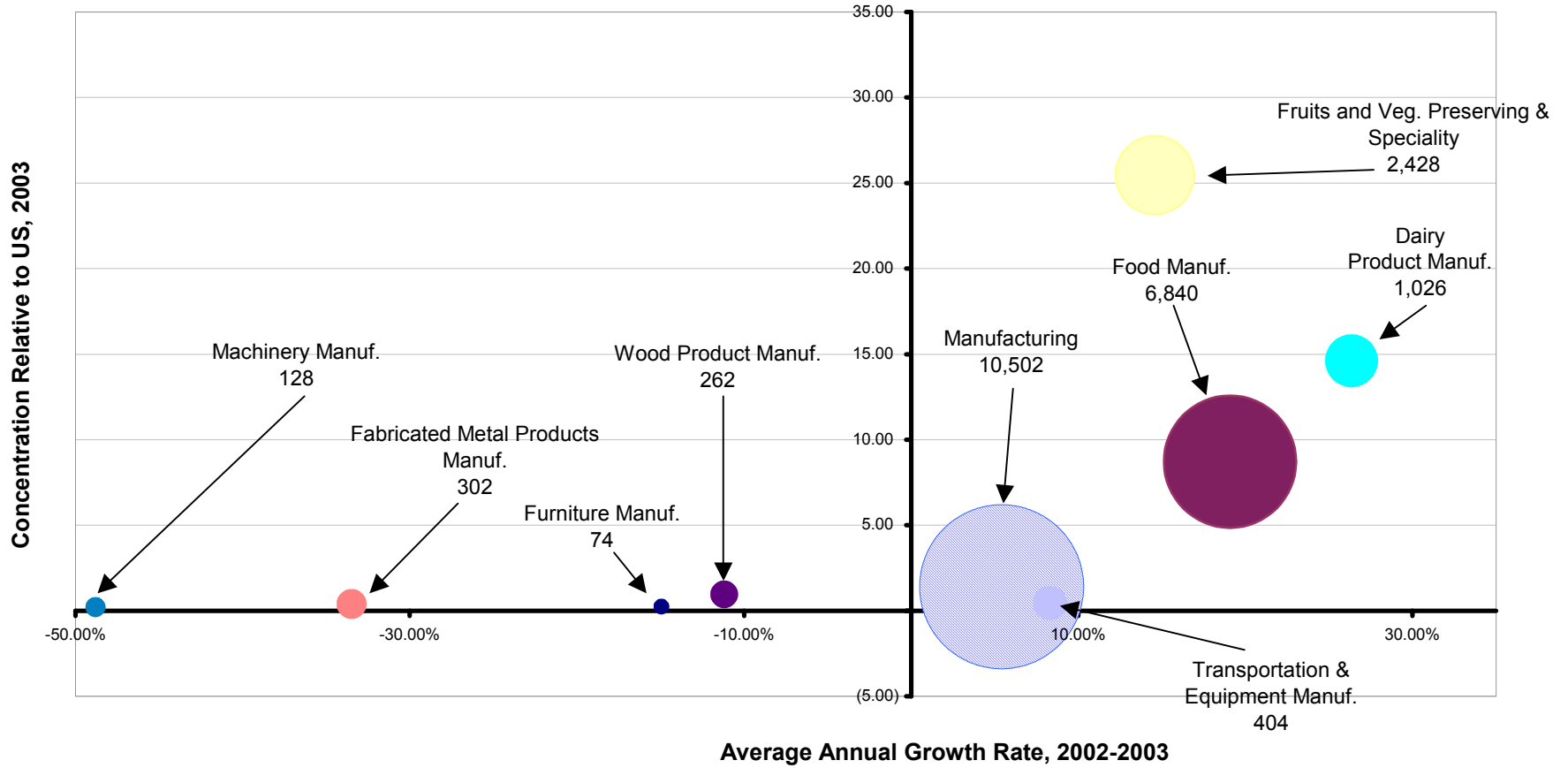
Keep in mind, however, that this is a descriptive tool rather than a diagnostic tool. The shift-share analysis does not tell us why some local industries are more competitive or not. Potential factors could include, local wage rates, workforce productivity. Also, adding in your own qualitative information to the quantitative data will complete the industrial picture.

**Growth, Employment Size, and Concentration to U.S. (Location Quotient)  
for All Sectors, Merced County 2001-2003**

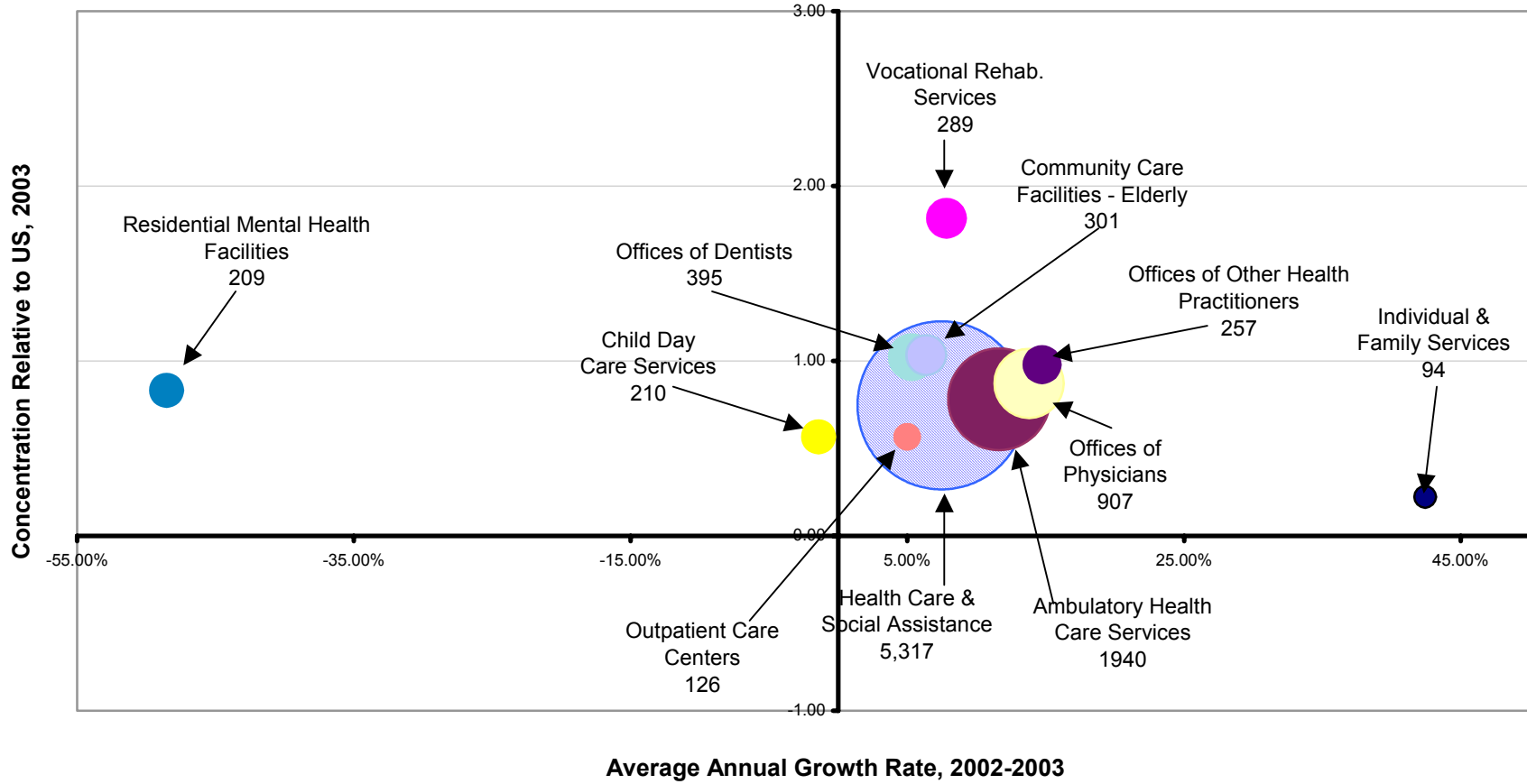


- Size: Current Economic Impact - Determines if an industry is a significant component of component of industrial employment in Merced County (Area of Bubble).
- Annual Average Growth: Job Creation - Show how various components have weathered market forces in their subsequent employment generation.
- Concentration: Regional Specialization - A concentration of greater than 1 indicates that the region is more specialized in the industry compared with U.S. or California\*. Specialization generally reflects competitiveness and outward orientation.

**Growth, Employment Size, and Concentration to U.S. (Location Quotient)  
for Manufacturing Sector/Sub-Sector/Industrial Group, Merced County 2002-2003**



**Growth, Employment Size, and Concentration to U.S. (Location Quotient)  
for Health Care and Social Services Sector/Industrial Group, Merced County 2002-2003**



**Table 1: EMPLOYMENT TRENDS IN MANUFACTURING - MERCED COUNTY 1994-2000**

<b>Employment, Growth, and Location Quotient, 2001 - 2003</b>												
Industry Title	Employment						Growth	Location Quotient		Change in Location Quotient		
	2001			2003				Percent	Net		2001	2003
	Level	Share	Sector Share	Level	Share	Sector Share						
Total, All Industries	64,170	100.0%		66,359	100.0%		3.41%	2,189	1.33	1.25	-0.059	
NAICS 31-33 Manufacturing	9,962	15.5%	100.0%	10,502	15.83%	100.00%	5.42%	540	1.23	1.40	0.14	
NAICS 311 Food manufacturing	5,744	9.0%	57.7%	6,840	10.31%	65.13%	19.08%	1,096	7.46	8.70	0.17	
NAICS 3114 Fruit and vegetable preserving and specialty	2,119	3.3%	21.3%	2,428	3.66%	23.12%	14.58%	309	21.62	25.46	0.18	
NAICS 3115 Dairy product manufacturing	812	1.3%	8.2%	1,026	1.55%	9.77%	26.35%	214	12.10	14.61	0.21	
NAICS 321 Wood product manufacturing	295	0.5%	3.0%	262	0.39%	2.49%	-11.19%	(33)	1.04	0.94	-0.10	
NAICS 332 Fabricated metal product manufacturing	454	0.7%	4.6%	302	0.46%	2.88%	-33.48%	(152)	0.55	0.39	-0.28	
NAICS 333 Machinery manufacturing	250	0.4%	2.5%	128	0.19%	1.22%	-48.80%	(122)	0.37	0.22	-0.42	
NAICS 336 Transportation equipment manufacturing	373	0.6%	3.7%	404	0.61%	3.85%	8.31%	31	0.39	0.44	0.13	
NAICS 337 Furniture and related product manufacturing	87	0.1%	0.9%	74	0.11%	0.70%	-14.94%	(13)	0.27	0.25	-0.09	
NAICS 339 Miscellaneous manufacturing	58	0.1%	0.6%	77	0.12%	0.73%	32.76%	19	0.16	0.22	0.36	

**EMPLOYMENT TRENDS IN HEALTH CARE AND SOCIAL SERVICES - MERCED COUNTY 1994-2000**

**Employment, Growth, and Location Quotient, 2001 - 2003**

Industry Title	Employment						Growth		Location Quotient		Change in Location
	2001			2003			Percent	Net	2001	2003	2001-2003
	Level	Share	Sector Share	Level	Share	Sector Share					
Total, All Industries	64,170	100.0%		66,359	100.0%		3.41%	2,189	1.33	1.25	-0.059
NAICS 62 Health care and social assistance	4,947	7.7%	100.0%	5,317	8.01%	100.00%	7.48%	370	0.77	0.75	-0.03
NAICS 621 Ambulatory health care services	1,738	2.7%	35.1%	1,940	2.92%	36.49%	11.62%	202	0.79	0.78	-0.01
NAICS 6211 Offices of physicians	797	1.2%	16.1%	907	1.37%	17.06%	13.80%	110	0.84	0.87	0.03
NAICS 6212 Offices of dentists	375	0.6%	7.6%	395	0.60%	7.43%	5.33%	20	1.08	1.02	-0.05
NAICS 6213 Offices of other health practitioners	224	0.3%	4.5%	257	0.39%	4.83%	14.73%	33	0.99	0.98	-0.01
NAICS 6214 Outpatient care centers	120	0.2%	2.4%	126	0.19%	2.37%	5.00%	6	0.61	0.57	-0.07
NAICS 623 Nursing and residential care facilities	1,135	1.8%	22.9%	1,244	1.87%	23.40%	9.60%	109	0.86	0.86	0.00
NAICS 6231 Nursing care facilities	N	N	N	575	0.87%	10.81%	N	N	N	0.71	N
NAICS 6232 Residential mental health facilities	406	0.6%	8.2%	209	0.31%	3.93%	-48.52%	(197)	1.79	0.83	-0.54
NAICS 6233 Community care facilities for the elderly	283	0.4%	5.7%	301	0.45%	5.66%	6.36%	18	1.15	1.03	-0.10
NAICS 6239 Other residential care facilities	N	N	N	159	0.24%	2.99%	N	N	0.00	1.86	N
NAICS 6241 Individual and family services	66	0.1%	1.3%	94	0.14%	1.77%	42.42%	28	0.18	0.22	0.21
NAICS 6243 Vocational rehabilitation services	268	0.4%	5.4%	289	0.44%	5.44%	7.84%	21	1.78	1.82	0.02
NAICS 6244 Child day care services	213	0.3%	4.3%	210	0.32%	3.95%	-1.41%	(3)	0.62	0.57	-0.08
N - Data suppressed due to confidentiality											

**SHIFT-SHARE ANALYSIS OF MERCED COUNTY—2001-2003**

**Manufacturing**

Industrial Title	Shift-Share Components of Employment Growth					
	National Growth		Industry Mix		Regional Shift	
	Percent	Net	Percent	Net	Percent	Net
NAICS 31-33 Manufacturing	-1.41%	-141	-10.27%	-1,023	17.11%	1,704
NAICS 311 Food manufacturing	-1.41%	-81	-1.23%	-71	21.73%	1,248
NAICS 3114 Fruit and vegetable preserving and specialty	-1.41%	-30	-5.82%	-123	21.82%	462
NAICS 3115 Dairy product manufacturing	-1.41%	-11	1.21%	10	26.56%	216
NAICS 321 Wood product manufacturing	-1.41%	-4	-4.94%	-15	-4.83%	-14
NAICS 332 Fabricated metal product manufacturing	-1.41%	-6	-10.09%	-46	-21.97%	-100
NAICS 333 Machinery manufacturing	-1.41%	-4	-14.36%	-36	-33.03%	-83
NAICS 336 Transportation equipment manufacturing	-1.41%	-5	-6.90%	-26	16.63%	62
NAICS 337 Furniture and related product manufacturing	-1.41%	-1	-9.86%	-9	-3.67%	-3
NAICS 339 Miscellaneous manufacturing	-1.41%	-1	-5.56%	-3	39.74%	23

**SHIFT-SHARE ANALYSIS OF MERCED COUNTY—2001-2003**

**Health Care and Social Services**

Industrial Title	Shift-Share Components of Employment Growth					
	National Growth		Industry Mix		Regional Shift	
	Percent	Net	Percent	Net	Percent	Net
NAICS 62 Health care and social assistance	-1.41%	-70	7.23%	358	1.66%	82
NAICS 621 Ambulatory health care services	-1.41%	-25	8.80%	153	4.23%	74
NAICS 6211 Offices of physicians	-1.41%	-11	6.41%	51	8.81%	70
NAICS 6212 Offices of dentists	-1.41%	-5	7.12%	27	-0.37%	-1
NAICS 6213 Offices of other health practitioners	-1.41%	-3	12.21%	27	3.94%	9
NAICS 6214 Outpatient care centers	-1.41%	-2	8.51%	10	-2.10%	-3
NAICS 623 Nursing and residential care facilities	-1.41%	-16	5.86%	67	5.15%	58
NAICS 6231 Nursing care facilities	-1.41%	N	3.17%	N	N	N
NAICS 6232 Residential mental health facilities	-1.41%	-6	7.37%	30	-54.48%	-221
NAICS 6233 Community care facilities for the elderly	-1.41%	-4	13.93%	39	-6.15%	-17
NAICS 6239 Other residential care facilities	-1.41%	N	2.43%	N	N	N
NAICS 6241 Individual and family services	-1.41%	-1	13.96%	9	29.87%	20
NAICS 6243 Vocational rehabilitation services	-1.41%	-4	2.46%	7	6.78%	18
NAICS 6244 Child day care services	-1.41%	-3	3.64%	8	-3.63%	-8
N - Data suppressed due to confidentiality						

<b>Occupations in Health Care</b>
<b>Occupation Title</b>
Accountants and Auditors
All other counselors, social and religious workers
All other drafters, engineering, and mapping techn
All other financial, information, and record clerk
All other material recording, scheduling, dispatch
All other secretaries, administrative assistants,
All other teachers, primary, secondary, and adult
Ambulance Drivers and Attendants, Except EMT
Anesthesiologists
Athletic Trainers
Audiologists
Bill and Account Collectors
Billing and Posting Clerks and Machine Operators
Biochemists and Biophysicists
Biomedical Engineers
Bookkeeping, Accounting, and Auditing Clerks
Budget Analysts
Business Operations Specialists, All Other
Cardiovascular Technologists and Technicians
Carpenters
Cashiers
Chefs and Head Cooks
Chief Executives
Child Care Workers
Child, Family, and School Social Workers
Clergy
Clinical, Counseling, and School Psychologists
Combined Food Preparation and Serving Workers, Including Fast Food
Compliance Officers, Except Ag, Constr, Health-Safety, and Transportation
Computer Operators
Computer Programmers
Computer Software Engineers, Applications
Computer Specialists, All Other
Computer Support Specialists
Computer Systems Analysts
Cooks, Institution and Cafeteria
Cooks, Short Order
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop

Couriers and Messengers
Credit Authorizers, Checkers, and Clerks
Customer Service Representatives
Data Entry Keyers
Database Administrators
Dental Assistants
Dentists
Diagnostic Medical Sonographers
Dietetic Technicians
Dietitians and Nutritionists
Dining Room and Cafeteria Attendants and Bartender Helpers
Dishwashers
Dispatchers, Except Police, Fire, and Ambulance
Electrical and Electronic Engineering Technicians
Electricians
Eligibility Interviewers, Government Programs
Emergency Medical Technicians and Paramedics
Employment, Recruitment, and Placement Specialists
Engineers, All Other
Environmental Scientists and Specialists, Including Health
Executive Secretaries and Administrative Assistants
Family and General Practitioners
File Clerks
Financial Analysts
Financial Specialists, All Other
First-Line Sup/Mgrs of Construction Trades and Extraction Workers
First-Line Sup/Mgrs of Office and Administrative Support Workers
First-Line Sup/Mgrs of Trans and Material-Moving Vehicle Operators
First-Line Supervisors/Managers of Food Preparation and Serving Workers
First-Line Supervisors/Managers of Housekeeping and Janitorial Workers
First-Line Supervisors/Managers of Mechanics, Installers, and Repairers
First-Line Supervisors/Managers of Production and Operating Workers
First-Line Supervisors/Managers of Retail Sales Workers
First-Line Supervisors/Managers, Protective Service Workers, All Other
Fitness Trainers and Aerobics Instructors
Food Preparation and Serving Related Workers, All Other
Food Preparation Workers
General and Operations Managers
Graphic Designers

<b>Occupations in Health Care - Continued</b>
<b>Occupational Title</b>
Health Diagnosing and Treating Practitioners, All Other
Health Educators
Health professionals and technicians, all other
Healthcare Support Workers, All Other
Heating, Air Conditioning, and Refrigeration Mechanics and Installers
Home Health Aides
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop
Human Resources Assistants, Except Payroll and Timekeeping
Industrial Machinery Mechanics
Instructional Coordinators
Insurance Claims and Policy Processing Clerks
Insurance Underwriters
Internists, General
Interpreters and Translators
Interviewers, Except Eligibility and Loan
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Laundry and Dry-Cleaning Workers
Librarians
Library Technicians
Licensed Practical and Licensed Vocational Nurses
Life Scientists, All Other
Life, Physical, and Social Science Technicians, All Other
Maids and Housekeeping Cleaners
Mail Clerks and Mail Machine Operators, Except Postal Service
Maintenance and Repair Workers, General
Maintenance Workers, Machinery
Management Analysts
Market Research Analysts
Marriage and Family Therapists
Media and Communication Workers, All Other
Medical and Clinical Laboratory Technicians
Medical and Clinical Laboratory Technologists
Medical and Public Health Social Workers
Medical Assistants
Medical Equipment Preparers
Medical Equipment Repairers

Medical Records and Health Information Technicians
Medical Scientists, Except Epidemiologists
Medical Secretaries
Medical Transcriptionists
Meeting and Convention Planners
Mental Health and Substance Abuse Social Workers
Mental Health Counselors
Microbiologists
Network and Computer Systems Administrators
Network Systems and Data Communications Analysts
Nuclear Medicine Technologists
Nursing Aides, Orderlies, and Attendants
Nursing Instructors and Teachers, Postsecondary
Obstetricians and Gynecologists
Occupational Health and Safety Specialists and Technicians
Occupational Therapist Aides
Occupational Therapist Assistants
Occupational Therapists
Office Clerks, General
Office Machine Operators, Except Computer
Operations Research Analysts
Opticians, Dispensing
Order Clerks
Orthotists and Prosthetists
Parking Lot Attendants
Payroll and Timekeeping Clerks
Pediatricians, General
Personal and Home Care Aides
Personal Care and Service Workers, All Other
Pharmacists
Pharmacy Aides
Pharmacy Technicians
Physical Therapist Aides
Physical Therapist Assistants
Physical Therapists
Physician Assistants
Physicians and Surgeons, All Other
Physicists

<b>Occupations in Health Care (Continued)</b>
<b>Occupational Title</b>
Podiatrists
Police, Fire, and Ambulance Dispatchers
Preschool Teachers, Except Special Education
Procurement Clerks
Production, Planning, and Expediting Clerks
Protective Service Workers, All Other
Psychiatric Aides
Public Relations Specialists
Purchasing Agents, Except Wholesale, Retail, and Farm Products
Radiation Therapists
Radiologic Technologists and Technicians
Receptionists and Information Clerks
Recreation Workers
Registered Nurses
Respiratory Therapists
Respiratory Therapy Technicians
Sales and Related Workers, All Other
Secretaries, Except Legal, Medical, and Executive
Security Guards
Shipping, Receiving, and Traffic Clerks
Social and Human Service Assistants
Speech-Language Pathologists
Stationary Engineers and Boiler Operators
Statistical Assistants
Stock Clerks and Order Fillers
Substance Abuse and Behavioral Disorder Counselors
Surgical Technologists
Switchboard Operators, Including Answering Service
Taxi Drivers and Chauffeurs
Training and Development Specialists
Truck Drivers, Light or Delivery Services
Word Processors and Typists

<b>Occupations in Manufacturing - Food Manufacturing</b>
<b>Occupation Title</b>
Accountants and Auditors
Agricultural and Food Science Technicians
Agricultural and Food Scientists
All other food processing workers
Billing and Posting Clerks and Machine Operators
Biological Technicians
Bookkeeping, Accounting, and Auditing Clerks
Cashiers
Chemical Technicians
Chemists
Chief Executives
Cleaners of Vehicles and Equipment
Cleaning, Washing, and Metal Pickling Equipment Operators and Tenders
Cooling and Freezing Equipment Operators and Tenders
Customer Service Representatives
Cutting and Slicing Machine Setters, Operators, and Tenders
Driver/Sales Workers
Executive Secretaries and Administrative Assistants
Extruding, Forming, Pressing, and Compacting Machine Operators
Financial Managers
First-Line Sup/Mgrs of Helpers, Laborers, and Material Movers, Hand
First-Line Sup/Mgrs of Office and Administrative Support Workers
First-Line Sup/Mgrs of Trans and Material-Moving Vehicle Operators
First-Line Supervisors/Managers of Mechanics, Installers, and Repairers
First-Line Supervisors/Managers of Production and Operating Workers
Food and Tobacco Roasting, Baking, and Drying Machine Operators and Tenders
Food Batchmakers
Food Cooking Machine Operators and Tenders
General and Operations Managers
Helpers--Production Workers
Industrial Engineers
Industrial Machinery Mechanics
Industrial Production Managers
Industrial Truck and Tractor Operators
Inspectors, Testers, Sorters, Samplers, and Weighers
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Machine Feeders and Offbearers
Maintenance and Repair Workers, General
Mixing and Blending Machine Setters, Operators, and Tenders
Office Clerks, General

Order Clerks
Packaging and Filling Machine Operators and Tenders
Packers and Packagers, Hand
Production Workers, All Other
Production, Planning, and Expediting Clerks
Purchasing Agents, Except Wholesale, Retail, and Farm Products
Sales Managers
Sales Rep, Wholesale and Manuf, Except Technical and Scientific Products
Separating, Filtering, Machine Setters, Operators, and Tenders
Shipping, Receiving, and Traffic Clerks
Stationary Engineers and Boiler Operators
Stock Clerks and Order Fillers
Team Assemblers
Transportation, Storage, and Distribution Managers
Truck Drivers, Heavy and Tractor-Trailer
Truck Drivers, Light or Delivery Services

<b>Occupations in Manufacturing - Transportation Equipment Manufacturing</b>
Occupation Title
Assemblers and Fabricators, All Other
Automotive Service Technicians and Mechanics
Billing and Posting Clerks and Machine Operators
Bookkeeping, Accounting, and Auditing Clerks
Bus and Truck Mechanics and Diesel Engine Specialists
Cementing and Gluing Machine Operators and Tenders
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders
Computer-Controlled Machine Tool Operators, Metal and Plastic
Crushing, Grinding, and Polishing Machine Setters, Operators, and Tenders
Customer Service Representatives
Cutting, Punching, and Press Machine Operators, Metal and Plastic
Drilling and Boring Machine Tool Operators, Metal and Plastic
Electrical and Electronic Engineering Technicians
Electrical and Electronic Equipment Assemblers
Electricians
Electromechanical Equipment Assemblers
Engine and Other Machine Assemblers
Executive Secretaries and Administrative Assistants
Extruding and Drawing Machine Operators, Metal and Plastic
Fiberglass Laminators and Fabricators
Financial Managers
First-Line Sup/Mgrs of Office and Administrative Support Workers
First-Line Supervisors/Managers of Mechanics, Installers, and Repairers
First-Line Supervisors/Managers of Production and Operating Workers
Forging Machine Setters, Operators, and Tenders, Metal and Plastic
Foundry Mold and Coremakers
Grinding and Polishing Workers, Hand
Grinding, Lapping, Polishing, Buffing Machine Operators, Metal and Plastic
Helpers--Production Workers
Industrial Engineering Technicians
Industrial Machinery Mechanics
Industrial Production Managers
Industrial Truck and Tractor Operators
Inspectors, Testers, Sorters, Samplers, and Weighers
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Lathe and Turning Machine Tool Operators, Metal and Plastic
Machinists
Maintenance and Repair Workers, General
Maintenance Workers, Machinery
Metal Workers and Plastic Workers, All Other
Metal-Refining Furnace Operators and Tenders
Milling and Planing Machine Operators, Metal and Plastic

Molding, Coremaking, and Casting Machine Operators, Metal and Plastic
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic
Numerical Tool and Process Control Programmers
Office Clerks, General
Order Clerks
Packers and Packagers, Hand
Production Workers, All Other
Production, Planning, and Expediting Clerks
Sales Rep, Wholesale and Manuf, Except Technical and Scientific Products
Secretaries, Except Legal, Medical, and Executive
Sewing Machine Operators
Shipping, Receiving, and Traffic Clerks
Stock Clerks and Order Fillers
Structural Metal Fabricators and Fitters
Team Assemblers
Tool and Die Makers
Truck Drivers, Light or Delivery Services
Welders, Cutters, Solderers, and Brazers