

# NEBRASKA WORKFORCE **OCTOBER 2011** Trends



**Where's the Green in Battelle's Advantage Assessment and Strategy?**



**Big Ten vs. Big Twelve Athletic Conference: Labor Force Data July 2011**

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Expanding the Huskers: Nebraska's Evolving Race Composition

**Flash Forward...**

Future Industry and Occupation Employment Trends

**Fast Facts...**

Columbus Day

**Map Facts...**

85 and Counting



# TABLE OF CONTENTS



**Where's the Green in Battelle's Advantage Assessment and Strategy?** 3  
*Feature Article*

**Big Ten vs. Big Twelve Athletic Conference: Labor Force Data July 2011** 6  
*Feature Article*

**Expanding the Huskers: Nebraska's Evolving Race Composition** 8  
*Census*

**Northeast Community College** 11  
*College Placement*

**85 and Counting** 12  
*Map Facts*

**Columbus Day** 13  
*Fast Facts*

**Future Industry and Occupation Employment Trends** 14  
*Flash Forward*

**Recession in Nebraska** 16  
*Website Spotlight*

**August 2011** 17  
*County Rates*

**Industry Development** 18

**Economic Indicators** 21

## Where's the GREEN in Battelle's Competitive Advantage Assessment and Strategy



LINDSAY BURFORD, RESEARCH ANALYST

**B**attelle Technology Partnership prepared an economic analysis of Nebraska's competitive advantage for the Nebraska Department of Economic Development and Department of Labor in October 2010. It sought to examine Nebraska's strengths in the global competition of the knowledge-based economy. It further examined how Nebraska could build upon these strengths, as well as close economic gaps that could be detrimental in Nebraska's economic growth.

The Office of Labor Market Information within the Nebraska Department of Labor recently released its Green Jobs Report. This report detailed the results of Nebraska's first analysis of green jobs in Nebraska. It examined both industry and occupations to determine what 'green' looks like in Nebraska. Many of Nebraska's results mimicked other states' findings. A little over three percent of Nebraska's workforce works in a green job; very similar rates were found for Kansas, Missouri, Montana, Utah, Hawaii, South Dakota, Minnesota, Oregon, and many more.

The purpose of this paper to cross-analyze these two reports to better understand the two and how they intersect. A brief description of each analysis will be given, as well as selected highlights from their findings. Finally, a cross analysis will enable one to see how green jobs are intertwined in Nebraska's Competitive Advantage.

### **Growing Jobs, Industries, and Talent: A Competitive Advantage Assessment and Strategy for Nebraska**

The Nebraska Department of Economic Development (DED) teamed with the Nebraska Department of Labor (NDOL) to consult with Battelle Technology Partnership Practice (BTPP). BTPP is a branch of a large independent non-profit research and development consulting firm. The assessment focused on Nebraska's competitive advantage through three "highly inter-related building blocks:" (1) an underlying performance

of multiple, specific industry clusters. Employment trends, economic output, geographic patterns of development, and expected national growth rates were important factors when examining the industry clusters. (2) Nebraska's position in innovation and high growth potential entrepreneurial development and how the state is positioned in core competencies for future growth. (3) Nebraska's overall talent position and its intersection with the leading industry clusters and how to establish concrete linkages of the talent pool.

Competitive advantage is an economic term used to describe how one entity has an advantage over the rest of the market to generate more sales or to retain more customers. In this specific case, BTPP sought to examine Nebraska's advantages over other states when considering the global economic market. BTPP's focus on the aforementioned building blocks enabled an assessment to determine the existing economic development efforts, the targeted industry developments associated with those efforts, and the introduction of strategies that facilitate efficient innovation, entrepreneurial, and talent development. Key findings are in the inset.

BTPP found there were twelve primary industry clusters drive the state's economic growth. They are broken down by employment trends: Current strengths (Financial Services; Transportation, Warehousing, and Distribution Logistics; Precision Metals Manufacturing; Biosciences; and Renewable Energy), Emerging Strengths or opportunities (Research and Development and Engineering Services; Health Services; and Hospitality and Tourism), and Retention targets (Business Management and Administrative Services; Agriculture and Food Processing; Software and Computer Services; and Agricultural Machinery).

To read the entire report, visit [http://www.neded.org/files/businessdevelopment/battelle/Main\\_Report\\_NE\\_CompetitiveAdvantageAssessment\\_v8a.pdf](http://www.neded.org/files/businessdevelopment/battelle/Main_Report_NE_CompetitiveAdvantageAssessment_v8a.pdf)

### **Nebraska Green Jobs Report**

Nebraska collaborated with five other states (Iowa, Montana, South Dakota, Utah, and Wyoming) to form the Northern Plains and Rocky Mountain Consortium. The Consortium sought to study green industries and occupations and did so by surveying almost 12,000 Nebraska businesses. The survey defined green economic activities and a green job to assist businesses as they self-identified their business and occupations within their business as green. Further, if a business provided green jobs, additional information was sought in order to gauge job growth. Key findings can be found in the inset.

- There were an estimated 30,725 green jobs within Nebraska during April, May, and June of 2010, or 3.4% of its workforce. Green employees were found in approximately 13% of businesses.
- The industry with the largest green employment was Construction with 6,595 green employees, or 15.1% of Construction's total employment. The Wholesale Trade industry employed 4,115 green employees, or 10.2% of its total employment.
- The Production Occupations had the largest green

## Top Ten Green Jobs for All Industry Quarters

Top Ten Green Jobs for All Industry Clusters	Industry Cluster with the Highest Employment Number	Employment Trend	2008 Estimated Employment	2018 Projected Employment	Total Openings	Avg Annual Openings	Change	Percent Change	Median Wage
Civil Engineers	Research, Development & Engineering Services	Emerging	1,794	2,147	656	65	353	19.68%	\$75,948
Team Assemblers	Precision Metal Manufacturing	Current	7,176	7,255	1,695	170	79	1.10%	\$28,479
First-Line Supervisors of Production and Operating Workers	Agriculture & Food Processing	Retention	5,144	5,258	808	80	114	2.22%	\$51,140
Structural Metal Fabricators and Fitters	Precision Metal Manufacturing	Current	1,056	1,074	240	24	18	1.71%	\$30,816
Farm Equipment Mechanics and Service Technicians	Transportation, Warehousing, and Distribution Logistics	Current	1,901	2,123	584	58	222	11.68%	\$31,446
Laborers and Freight, Stock, and Material Movers, Hand	BioSciences	Emerging	16,315	16,191	5,251	525	-124	-0.76%	\$24,463
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	Agriculture & Food Processing	Retention	28,745	24,733	7,752	775	-4,012	13.96%	\$20,715
Maintenance and Repair Workers, General	Precision Metal Manufacturing	Current	9,059	10,032	2,368	237	973	10.74%	\$32,454
Industrial Engineers	Precision Metal Manufacturing	Current	1,163	1,366	500	50	203	17.45%	\$69,201
Heavy and Tractor-Trailer Truck Drivers	Transportation, Warehousing, and Distribution Logistics	Current	31,091	37,727	12,198	1,220	6,636	21.34%	\$40,343

employment numbers with 6,565 employees, where 21.3% of its total employment was green.

- There were two top ten green occupation lists: one based upon top employment, the other based upon green percentage. The top occupations by employment were: HVAC Installers; Electricians; Heavy and Tractor-Trailer Truck Drivers; Industrial Truck and Tractors Drivers; and First-Line Supervisors of Production and Operating Workers. The top occupations by green percentage were: Hazardous Materials Removal Workers; Environmental Science and Protection Technicians, including Health; Forest and Conservation Technicians; Transportation Workers, All Other; and Production Workers, All Other.

- To read the entire report, visit <https://networks.nebraska.gov/admin/gsipub/htmlarea/uploads/Nebraska%20Green%20Jobs%20Report.pdf>

### Cross Sectional Methodology

The authors of the Battelle study included 238 different industry codes between the twelve industry clusters. The Green and Total Employment by Nebraska Industry Clusters table discloses how many different industry codes were included in each industry cluster, as well as how many total businesses. This table represents data from the third quarter in 2009. Data from the Green Jobs dataset with matching industry codes were extracted to further examine green jobs within each industry cluster. The final sample revealed there were 18,288 businesses that employed 9,972 green jobs, or 2.1% of total employment of the twelve industry clusters. While the total employment numbers of the industry clusters appear to be small, one in three Nebraska green jobs are found in one of these twelve industry clusters.

### Results

The Industry Clusters table also shows the total weighted green employment, total employment, and the percentage of green employment within each industry cluster. Research, Development, and Engineering Services had the highest green employment percentage and total number of green employment with 22.4% of total employment, or 2,232 employees, working in green jobs. It is important to remember that this industry is

considered to be an emerging strength or opportunity. As jobs are created or expanded in this industry, it will be imperative to note that many of these jobs have green responsibilities. Also important to note, the Biosciences industry cluster was also an emerging strength and opportunity; it currently was the fourth highest green employment percentage among the twelve clusters with 6.7% of total employment being employed in green jobs, or 1,334 employees.

Precision Metals Manufacturing followed with 12.1% of total employment, or 2,162 employees, working in green jobs. This industry is considered to be a current strength within Nebraska. The Agricultural Machinery industry cluster had the fewest number of businesses, as well as one of the smaller total employment numbers among all the other industries. However, it did have one of the higher green employment percentages, where 7.8% of its total employment is working in a green job, or 997 Nebraska employees. This suggests that while this industry has a lower employment number than other industry clusters, many of these jobs are being considered green by employers; employees may need green training and/or knowledge to fill these types of jobs.

The top ten table lists the top green jobs across all industry clusters and the long-term projections associated with them. Interestingly, many of these top green jobs are found within the same type of occupational grouping. For instance, there are two types of Architecture and Engineering Occupations in the top ten: Civil and Industrial Engineers. There are three Production Occupations: Team Assemblers, First-Line Supervisors of Production and Operation Workers, and Structural Metal Fabricators and Fitters. There are also two Transportation and Material Moving Occupations: Laborers and Freight, Stock, and Material Movers, Hand and Heavy and Tractor-Trailer Truck Drivers.

The top occupation among all the industry clusters is Civil Engineers. Between all the industries, there were 716 Civil Engineers. They were found primarily in the Research, Design, and Engineering Services (652 employees). They

## Green and Total Employment by Nebraska Industry Clusters

Nebraska Industry Cluster	Total NAICS Codes	All Businesses	Total Green Employment (weighted)	Total Employment	Green Employment Percentage
Agricultural Machinery	3	430	997	12,830	7.8%
Agriculture & Food Processing	59	3,264	1,708	91,438	1.9%
Biosciences	27	415	1,334	19,986	6.7%
Business Management & Administrative Services	17	2,839	160	53,843	0.3%
Financial Services	41	4,409	146	84,492	0.2%
Health Services	16	925	97	106,365	0.1%
Hospitality & Tourism	21	827	273	21,277	1.3%
Precision Metals Manufacturing	8	375	2,162	17,829	12.1%
Research, Development, & Engineering Services	4	1,255	2,232	9,964	22.4%
Software & Computer Services	6	1,350	100	22,194	0.5%
Transportation, Warehousing and Distribution Logistics	36	2,199	763	45,487	1.7%
<b>Total</b>	<b>238</b>	<b>18,288</b>	<b>9,972</b>	<b>485,705</b>	<b>2.1%</b>

were also found in the Software and Computer Services and Agricultural Machinery industry clusters. The next three green jobs with the highest employment all come from the Production Occupations. Team Assemblers had 708 green jobs between two industry clusters. The majority was found in the Precision Metal Manufacturing cluster; they were also in the Agricultural Machinery cluster. First-Line Supervisors had 707 green jobs across all industries. The supervisors were almost equally spread between three different industry clusters: Agricultural Food Processing, Precision Metal Manufacturing, and BioSciences. Structural Metal Fabricators and Fitters had 675 green employees across two industries: Precision Metal Manufacturing and Agricultural Machinery. Rounding out the top five, Farm Equipment Mechanics and Service Technicians had 605 green jobs. Over half of these green jobs were found in the Transportation, Warehousing, and Distribution Logistics industry, while the rest were found in the Agricultural Machinery cluster. The Top Green Jobs by Each Cluster matrix lists the top three green jobs (by weighted employment) for each industry cluster.

Six of the top ten occupations are found in industry clusters that are current Nebraska strengths. Heavy and Tractor-Trailer Truck Drivers, in the Transportation and Warehousing cluster, have a 21.34% long-term projected growth rate. This finding reassures economic developers that continued growth will occur within this cluster. Precision Metal Manufacturing has four different occupations where the top employment is found within its cluster. Two of these occupations have double-digit long-term projected growth as well: Maintenance and Repair Workers and Industrial Engineers at 10.74% and 17.45%, respectively. According to the second quarter 2011 Occupational Wage Estimates, the median wage for repair workers is slightly over \$32,000, while the median wage for Industrial Engineers is almost \$70,000. The growth of these occupations is essential for Nebraska's continued economic growth, according to the Battelle Study.

There are two top green jobs that are found in the emerging employment trends: Civil Engineers and Laborers and Freight, Stock, and Material Movers (Hand). According to the long-term projections, there is almost a 20 percent expected job growth from 2008 to 2018 with a median wage of almost \$76,000. This finding will undoubtedly secure the continued growth of the Research, Development and Engineering Services industry cluster within Nebraska. The only top occupation in this cross analysis to have a negative percentage growth between 2008 and 2018 was Laborers and Material Movers. They were employed in three different industry clusters, with the vast majority residing in the BioSciences emerging industry cluster. However, they were also employed in Agricultural Machinery and Agriculture and Food Processing. These latter industries are retention industries where Battelle stated they continue to be an asset to Nebraska, but the job growth within these industries are slower than the national average. It could be that this occupation could see an incline in the BioSciences cluster, but lag behind in the other two industries.

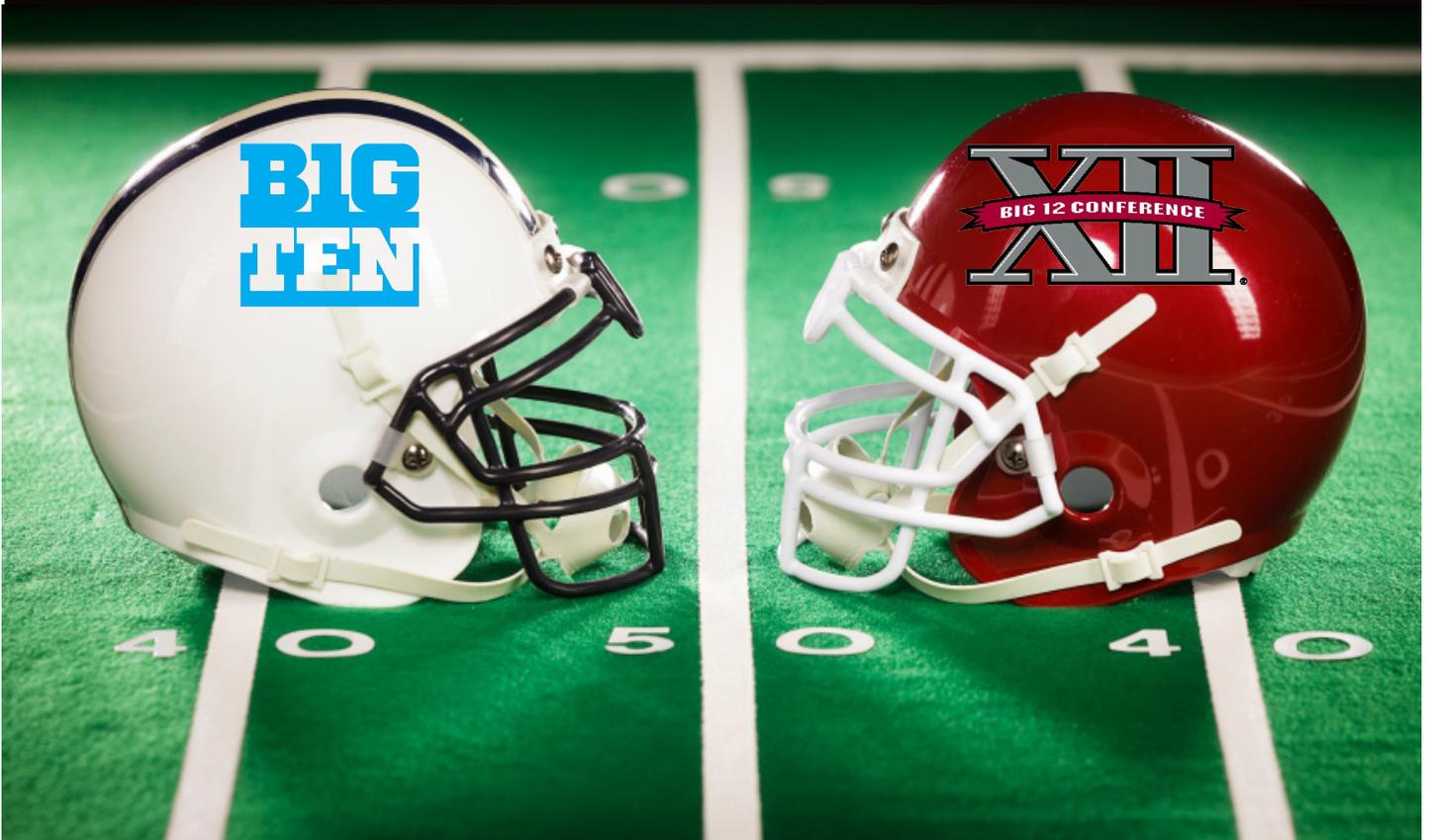
### Conclusion

Nebraska has consistently had one of the lowest unemployment rates in the country over the past decade. As states try to maintain a strong business front, Nebraska continues to lead the way with a business-friendly environment. The Battelle study furthers this notion by detailing strengths and weaknesses within Nebraska's industries. However, the addition of green jobs data can yield more fruitful. Often times, employers' needs from employees evolve. It is evident that many jobs are evolving to include green tasks and responsibilities; of which, can possibly change the needed skills or training required before entering a job.

This analysis can shed a better understanding of the types of green jobs that can be increasing within these core industry clusters. It will enable educators, economic developers, and career center managers better prepare the work force and labor force to strengthen Nebraska's economy.

# Big Ten Vs Big Twelve Athletic Conference

## Labor Force Data July 2011



College athletic conferences have been a hot sports topic around Nebraska over the last couple of years. On July 1, 2011, the universities of Nebraska and Colorado ended their seventeen-year affiliations with the Big 12 Division 1 College Athletic Conference. Colorado joined the Pacific 10 (PAC 10) Division 1 College Athletic Conference (now the PAC 12 after also adding the University of Utah). Nebraska joined the Big Ten Division 1 College Athletic Conference.

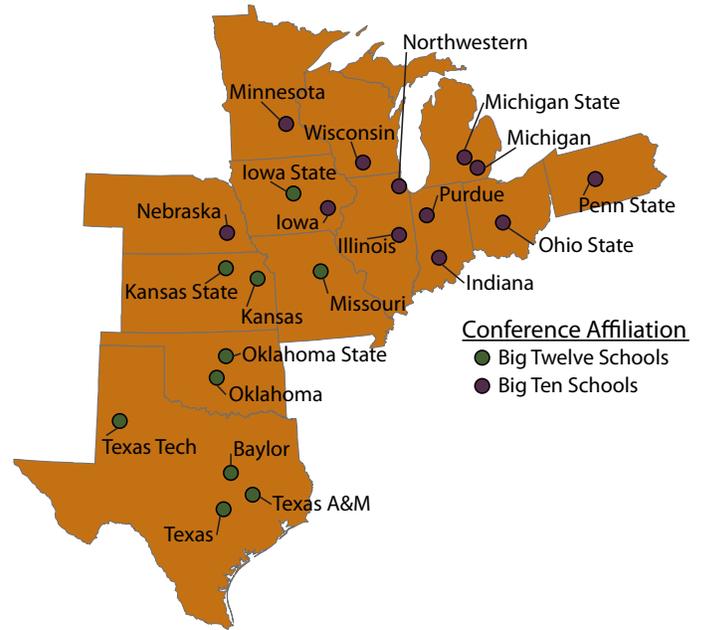
As of July 1st, ten colleges in five states are members of the Big 12 Division 1 College Athletic Conference while twelve colleges in nine states are members of the Big Ten Division 1 College Athletic Conference. Neither conference is going to follow the PAC 10's lead by changing (or swapping) its conference name to one which actually reflects its membership count.

Iowa is the lone state with a school in both conferences. The University of Iowa was formed in 1847 and is a Big Ten member. Iowa State was formed in 1858 and is currently a Big 12 member. For purposes of this report, Iowa's state data is calculated with the total Big Ten Conference data since that membership predates its Big 12 affiliation. Each Iowa school's data is calculated with its appropriate conference.

Non-seasonally adjusted data has been used to compile this report. This July 2011 data is preliminary and the counties used in this report are assumed to be the primary homes of each Big 12 or Big 10 athletic conference team.

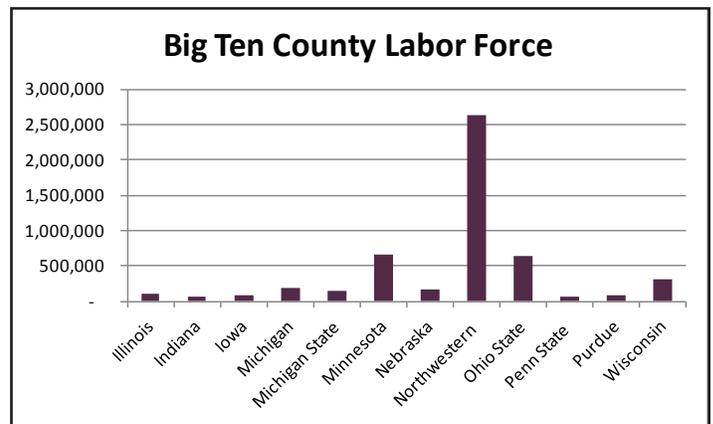
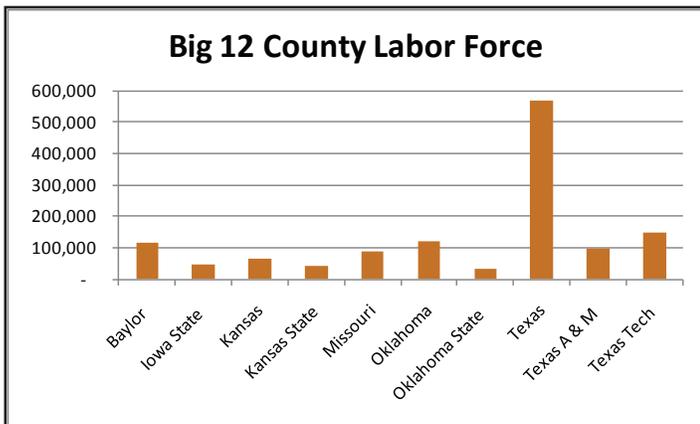
Combined, the thirteen states of both conferences represent a labor force of 54.4 million people; of which 4.7 million are unemployed, resulting in an unemployment rate (UI) of 8.7%. The Big 12 states combined civilian labor force in July was 18.6 million; its unemployed labor force was 1.5 million and its average unemployment rate was 8.3%. The Big Ten state's civilian labor force was 35.7 million; its unemployed labor force was 3.2 million and its unemployment rate was 8.9%. The conference labor force statistics at the county

## Big Ten and Big Twelve Conference School Locations



levels were as follows: Big Ten labor force- 5.1 million total, 466,000 unemployed and UI rate of 9.1%; Big 12 labor force- 1.3 million total, 91,000 unemployed, and 6.9% UI rate.

The non-seasonally adjusted UI rate for each of these conferences has been compiled using the UI rates of the home county of each of its member colleges. As a result, the average UI rate of the Big 12 conference is significantly lower than the rate of its combined states; 6.9% vs 8.3%. The Big Ten doesn't fair as well. Even though nine of its twelve member schools have UI rates below their state average of 8.9%, Northwestern University in Cook County, Illinois (also home to the city of Chicago) has high enough unemployment numbers to raise the average Big Ten conference UI rate to 9.1%; 0.2 points above its member states July average of 8.9%. Were the Northwestern University labor force data removed from the equation, the UI rate of the remaining Big Ten conference would drop two points to 7.1%.





## Expanding the Huskers: Nebraska's Evolving Race Composition

LINDSAY BURFORD, RESEARCH ANALYST

Nebraska's history has long been a rural, agricultural one. It continues to advance its agricultural backbone and expand its economic market to include many other markets. As the economic market changes in Nebraska, one would expect other things to change. This column has evaluated how gender and age have evolved over the past decade. This month, it will look at race and origin.

### Nebraska's 2010 Population by Race and Hispanic Origin

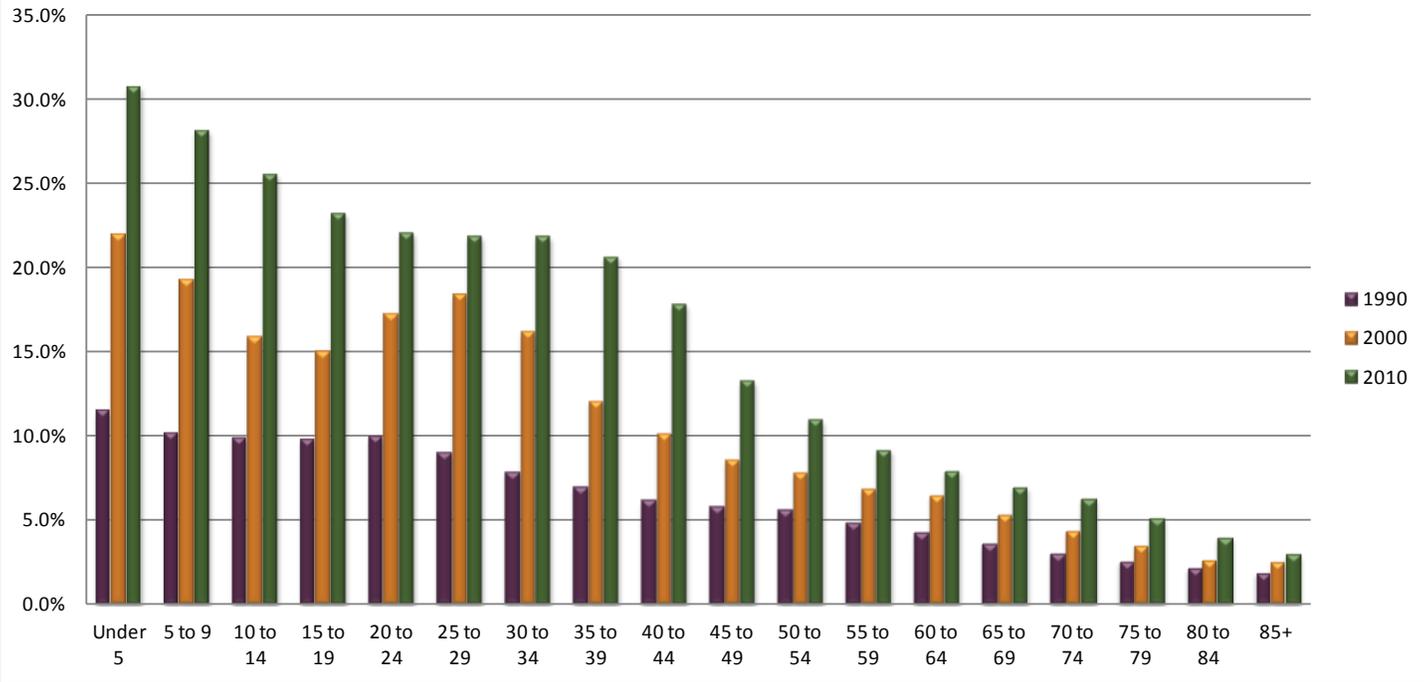
After the 2010 Census, Nebraska residents were

predominately white and non-Hispanic with 82.1% of its residents claiming this as their race and Hispanic origin. The next largest demographic was Hispanic or Latino with 9.2% of Nebraska residents fitting in this category. Black or African American (non-Hispanic) was the third highest category with 4.4% of Nebraskans citing this category as their race. Asian (non-Hispanic) alone accounted for 1.7%; two or more races (non-Hispanic) accounted for 1.6%, American Indian and Alaska native (non-Hispanic) accounted for 0.8%; and Native Hawaiian and Other Pacific Islander (non-Hispanic) and some other race (non-Hispanic) both accounted for

### Race and Hispanic/Latino Origin Percentage Changes between 2000 and 2010

Race/Hispanic Origin	2000	2010	%
	Population	Population	Change
Total population	1,711,265	1,826,341	6.7%
Not Hispanic/Latino Origin	1,616,838	1,658,936	2.6%
White alone	1,533,261	1,572,838	2.6%
African American or Black alone	68,541	82,885	20.9%
American Indian & Alaska Native alone	14,896	18,427	23.7%
Asian alone	21,931	32,293	47.2%
Native Hawaiian, Pac. Islander alone	836	1,279	53.0%
Some other race alone	47,845	79,109	65.3%
Two or more races	23,953	39,510	64.9%
Hispanic/Latino Origin	94,425	167,405	77.3%
Minority	272,427	420,908	54.5%

## Minority Population as a Percentage of the State Total Population by 5-Year Age Groups, 1990, 2000, and 2010 Census Populations



0.1% of Nebraska's total population.

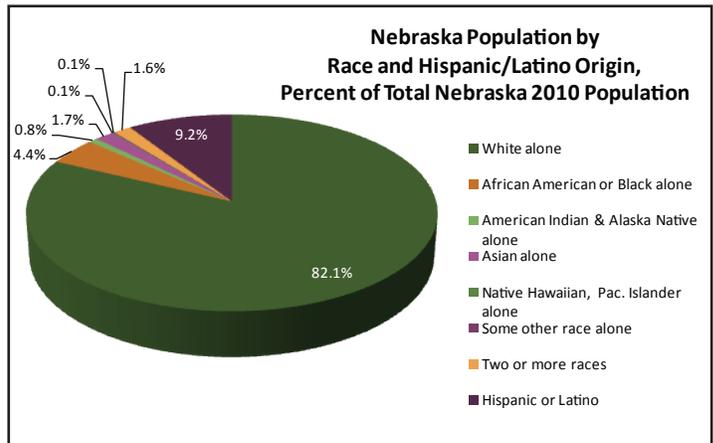
These numbers, displayed in the pie chart "Nebraska Population by Race and Hispanic/Latino Origin, Percent of Total Nebraska 2010 Population", show a picture that Nebraska continues to have a large demographic of white, non-Hispanic residents. However, the picture becomes interesting when one looks at how each racial and Hispanic-origin category has changed over the past decade. Nebraska's total population grew 6.7% over the past decade to a total of 1,826,341 individuals. The white, non-Hispanic population only grew 2.6% over the past decade. The vast majority of Nebraska's growth was by individuals fitting into a racial category other than white and non-Hispanic. The Race and Hispanic/Latino Origin Percentage Changes, Between 2000 and 2010 Table shows how each racial and Hispanic origin category has grown over the past decade.

The total minority growth change was 54.5%. The minority with the largest percentage growth was Hispanic or Latino at 77.3%. Individuals citing some other race and two or more races had the next largest percentage growths at 65.3% and 64.9%, respectively. White, non-Hispanic individuals cited the lowest percentage growth at 2.6%. Even the racial category with the fewest inhabitants, Native Hawaiian and Pacific Islander, more than doubled in size over the past decade; its percentage change was 53.0% between 2000 and 2010 for a 2010 population of 1,279.

### Minority Population

In 1990, 7.6% of Nebraska's total population was considered a 'minority' population; one that is not white alone. In 2000, the percentage increased to 12.7%. After the 2010 Census, the percentage is now 17.9%. As Nebraska experiences a population boom in all racial and Hispanic populations, it is also important to consider the age of the residents. The Minority Population as a Percentage of the State Total Population by 5-Year Age Groups Table show how the minority population has changed over the past three decades.

In 1990, 11.5% of children under the age of five were in a



## New and Upcoming Census Releases

- 2010 Census data – White and Black Population Briefs: discusses the size and growth of each population, includes maps down to the county level. September release.
- 2010 Census data – Statistics on Same-Sex Couples: includes the number of married couples, a set of alternative estimates of same-sex spouse and unmarried partners at the national and state levels. The estimates were developed to account for data capture errors that make it difficult to measure same-sex couple households. The ACS same-sex estimates will be released simultaneously. News conference held September 27; report released thereafter.
- Education and Synthetic Work-Life Earnings – report showing the relationship between lifetime earnings and education; it takes race and gender into account. September release.
- Income, Poverty and Health Insurance Coverage, 2010 – official findings from the Current Population Survey. Webinar conference held September 13, report released thereafter.
- Reported Voting and Registration by Race, Hispanic Origin, Sex and Age: November 2010 – results compare the voting and registration patterns by various characteristics. September release.
- 2009 Annual Survey of State and Locally Administered Public Employee Retirement Systems – tables detailing revenues, expenditures, financial assets, and membership information for public employee retirement systems. September release.
- Commuting in the U.S., 2009 – detailed analysis of commuting patterns for the nation and metro areas, including means of transportation, average travel time, time of departure, and demographic data. September 22 release.
- 2010 American Community 1-Year Estimates – Webinar held September 20 discussing the new release. Data released soon thereafter.



the percentages of minority children have almost tripled. As age increases, the percentage of minority population compared to the state total population diminishes with the exception of 30 – 44 year olds. There was a surge of higher growth of minority populations within these age groupings. This correlates to the substantial jump in children growth; the 30s are common child-rearing ages. After age 44, the pattern returns to a decreasing percentage of the total state population as age increases. One of five individuals in their late 30s will be a racial or ethnic minority compared to one in ten individuals in their early 50s fitting into the same type of category. So, while the elderly population is becoming more diverse, it is at a much slower rate than the younger generations.

## Conclusion

This past decade has seen a moderate population growth for the state. As more Census data becomes available, it has also revealed a diverse change in Nebraska's demographic makeup. The vast majority of the state's growth was encountered in a racial or ethnic category other than white, non-Hispanic. Furthermore, the key to understanding where the minority lies is when one evaluates the age breakdown of the minority population. One in three children will now come from a racial category other than white or come from a Hispanic or Latino origin. This newfound diversity will create many opportunities for Nebraska's future work force.

minority racial or ethnic category. In 2010, almost 31 percent of children under the age of five fit into a minority racial or ethnic category of some type. The same effect can be seen in age categories 5 – 9, 10 – 14, and 15 – 19 where

## NORTHEAST COMMUNITY COLLEGE

### Employment Outcomes

There were 759 Northeast Community College graduates between July 1, 2008 and June 30, 2009. Of these graduates, 519 (68%) were working in Nebraska in the first quarter of 2010. Between 2008 and 2010, Northeast Community College had the highest decrease of all community colleges in the percentage of graduates working in the state. Almost half (46%) of the graduates were female with 72% of the female graduates working in Nebraska while 65% of male graduates were employed in the state.

There was at least one graduate employed in 41 of the state's 93 counties. Madison County had the most graduates working in the county at 145 and the largest share with 39% of Northeast Community College graduates working in the state. Holt and Wayne Counties followed with 6% of the graduates employed in each of those counties.

There were 163 graduates in 22 degree/fields of study that had more than 85% of the graduates working in the state. Within this group, the 32 Lineworker Associate Degree graduates had the highest estimated average annual earnings of \$36,885 followed by Physical Therapist Assistant Associate Degree graduates with \$36,266. Registered Nursing Associate Degree graduates had the highest number of graduates, 52, with 48 working in the state earning an estimated \$35,921.

Majors in technical and medical fields of study produced graduates with the highest wages. Associate Degree

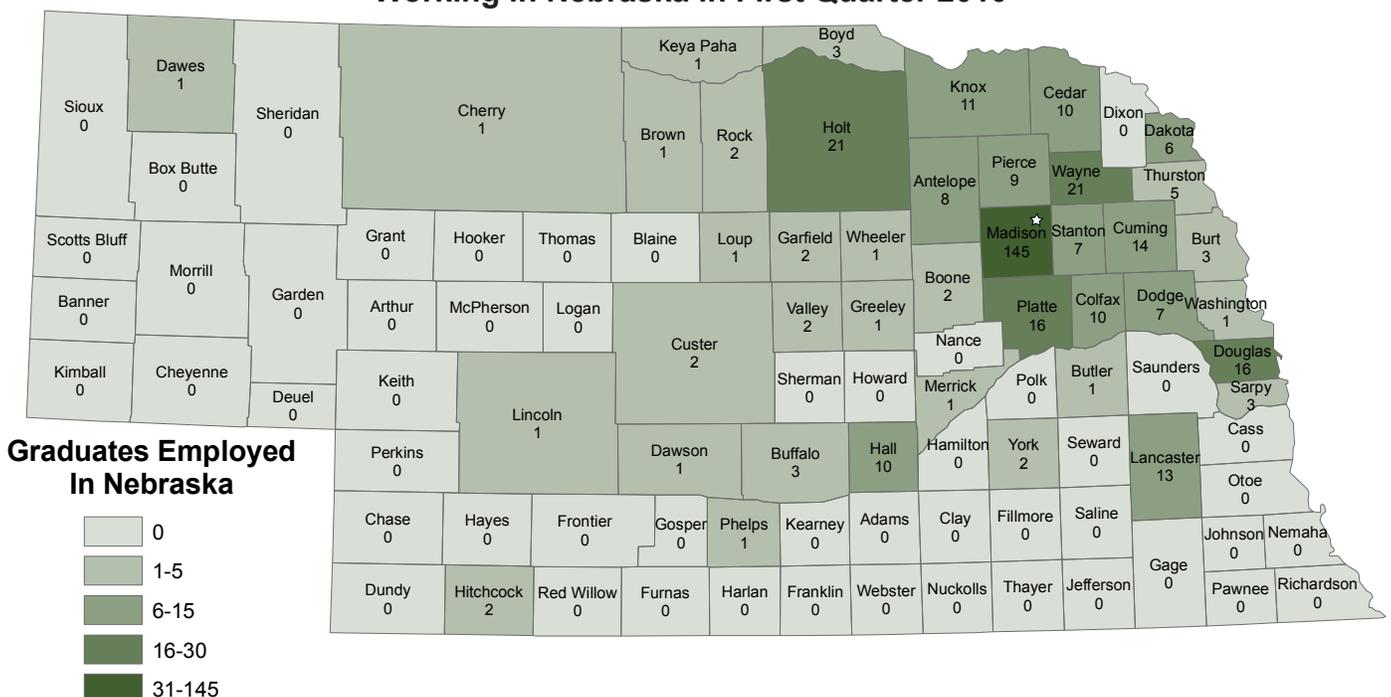


graduates in Medium/Heavy Vehicle and Truck Technology had the highest estimated average annual wages of all fields of study with \$37,092. This was followed by individuals completing Associate Degrees in the Lineworker field of study.

The 23 graduates employed in the Utilities industry had the highest estimated average annual earnings of \$44,870. The six graduates employed in the Transportation and Warehousing industry had the second highest earnings of \$36,453. The Health Care industry employed the highest number of graduates with 124. The estimated average annual earnings for graduates working in the Health Care industry were \$24,801.

For more outcomes information on Northeast Community, Central Community College, Metropolitan Community College, Mid-Plains Community College, College Southeast Community College Western Nebraska Community College, Chadron State College, Peru State College, Wayne State College and the University of Nebraska – Kearney, contact the Nebraska Department of Labor's Office of Labor Market Information.

**2008-2009 Mid-Plains Community College Graduates Working in Nebraska in First Quarter 2010**





# Columbus Day



JACOB LIUDAHL, RESEARCH ANALYST

This year, October 10th marks Columbus Day. Named for Christopher Columbus, Columbus Day first became an official state holiday in Colorado in 1906, and became a federal holiday in 1937. The day is more than just an American holiday; however, as it is celebrated in many Latin American countries, the Bahamas, Spain and Uruguay.

Not surprisingly, Columbus's former occupation as a Ship Captain doesn't have a large contingent in Nebraska. Nationally, there were approximately 33,000 Captains, Mates and Pilots of Water Vessels in 2008 making just over \$64,000 on average annually.

Columbus's duty to chart his voyage via maps would fall under the job description of a Cartographer and Photogrammetrist. A similar present-day occupation would be that of a Surveyor, charting the exact shape and contour of property boundaries. In 2008, there were 64 Cartographers and Photogrammetrists and 279 Surveyors in Nebraska.

Columbus, Nebraska was settled in 1856 by the Columbus Town Company from Columbus, Ohio. Coincidentally, Columbus, Ohio was named after Christopher Columbus.

Columbus explored for Spain but he was known for his Italian heritage. The 2009 American Community Survey reported there were 17.8 million Americans with Italian heritage in the United States. In Nebraska, nearly 50,000 people claimed Italian heritage.

Instead of celebrating Columbus Day, South Dakota celebrates Native American Day in a show of support for the indigenous population. Nebraska and South Dakota share a number of native tribes, including the Cheyenne, Ponca, Lakota Sioux, Dakota Sioux, and Yankton Sioux.

# Future Industry and Occupation Employment Trends



JODIE MEYER, RESEARCH ANALYST

**C**ontinuing in the series of highlighting industry and occupational projections for Nebraska's regions, this month focuses on the Omaha Consortium. The Omaha Consortium includes the Nebraska counties of Cass, Douglas, Sarpy, Saunders, and Washington.

### Industry Projections

Projected industry growth of 67,258 jobs is expected in the Omaha Consortium by 2018 according to Industry Employment Projections, an increase of 14.4%. Most industry employment in 2008 was in Trade, Transportation, and Utilities which employed 93,600 workers, accounting for 20.1% of employment in this region. Quite a bit of employment for the region is also in Education and Health Services accounting for 19.6% of the regions employment or 91,456 workers. This industry sector is expected to experience the highest projected net change in employment by 2018 adding 18,460 jobs, a change of 20.2%. The fastest growing industry sectors by percent change are Construction at 24.8% adding 6,104 jobs, and Professional and Business Services at 22.8% adding 14,897 jobs. The Natural Resources and Mining industry employed the least number of workers in 2008, only accounting for 0.9% (3,992 jobs) of the employment in this region and is the only sector expected to decline (10.4% or 416 jobs).

The top sub-sector growth industry from 2008-2018 (by numeric change in jobs) is Professional, Scientific, and Technical Services expecting to add 9,048 jobs a 33.9% increase. The Ambulatory Health Care Services Industry is expected to add the second highest amount of jobs, increasing by 35.6% and adding 5,824 jobs.

When examining the five industries expected to experience the greatest amount of decline (by numeric change in jobs)

Merchant Wholesalers of Nondurable Goods are expected to lose the most jobs in the ten-year period, a loss of 429 jobs. Two agricultural-related industries make the list of greatest declines; Crop and Live Production are expected to lose a combined 532 jobs.

### Occupational Projections

Industry employment is an important component of the employment picture in a region. It is also important to examine the types of occupations that will experience growth and decline as a result of changes in industry employment throughout the state.

There is expected to be occupational growth in the Omaha Consortium according to the 2008-2018 Occupational Projections. The total projected numeric employment change over the ten-year period is 67,258, a 14.4% increase. A total of 177,254 job openings are expected in the Omaha Consortium from 2008-2018, with 70,170 jobs expected from growth and 107,254 from replacements. Replacement openings account for 60.4% of all job openings. This is lower than the statewide rate where 67.2% of the openings are expected to be from replacements indicating more job growth is expected in the region compared to statewide.

In 2008, Office and Administrative Support occupations employed 84,859, making it the largest occupational category in the Omaha Consortium, accounting for 18.2% of the region's occupational employment. This occupational category is also expected to see the largest net change in employment with 9,117 jobs projected to be added by 2018, an increase of 10.7%. Health Care Support occupations are the fastest growing occupational category by percent change adding 3,209 jobs, a 28.4% increase. Farming, Fishing, and Forestry occupations employed the least

## Industries with the Greatest Numeric Changes in Employment 2008-2018

	Industry Title	2008 Estimated Employment	2018 Projected Employment	Numeric Change	% Change
Growing	Professional, Scientific, and Technical Services	26,670	35,718	9,048	33.9%
	Ambulatory Health Care Services	16,361	22,185	5,824	35.6%
	Food Services and Drinking Places	28,495	33,186	4,691	16.5%
	Educational Services (private + state + local)	39,332	43,933	4,601	11.7%
	Specialty Trade Contractors	17,228	21,766	4,538	26.3%
Declining	Merchant Wholesalers, Nondurable Goods	5,288	4,859	-429	-8.1%
	Printing and Related Support Activities	3,059	2,729	-330	-10.8%
	Crop Production	1,971	1,673	-298	-15.1%
	Computer and Electronic Product Manufacturing	1,359	1,096	-263	-19.4%
	Livestock Production	1,548	1,314	-234	-15.1%

amount of workers in 2008, only employing 2,585 or 0.6% of the region's occupational employment. This occupational category is the only occupational category expecting a decline (-13.0% or -337 jobs).

The highest number of total job openings is expected in Office and Administrative Support occupations with 28,888 total openings- 10,483 from job growth and 18,405 from replacements. Due to the large number of total openings, this occupational category is expected to have the highest amount of growth and replacement openings as well. The lowest number of openings is projected for Farming, Fishing, and Forestry occupations. Almost all of these openings are expected to be from replacements (686, 98.8%) with only 8 of the 694 total openings attributed to job growth. The largest percentage of total openings attributed to growth is projected in Health Care Support occupations where 71.6% (3,210) of the 4,481 total openings projected are to be from growth.

Ranking occupations by numeric change from 2008 to 2018, Truck Drivers (Heavy and Tractor-Trailer) top the

list with an expected 4,141 jobs added. Customer Service Representatives come in second with 2,831 jobs expected to be added. Rounding out the top five are: Combined Food Preparation and Serving Workers, Including Fast Food; Retail Salespersons; and Accountants and Auditors.

Telemarketers are expected to experience the greatest amount of decline by numeric change over the ten-year period with a projected loss of 400 jobs, a -12.7% decrease. Overall, Office and Administrative Support occupations are expected to experience large growth but the outlook is not as positive for all occupations within this category. The occupations of Order Clerks; Postal Service Mail Sorters, Processors, and Processing Machine Operators; and File Clerks are all found in this category and are projected to lose a combined 649 jobs.

A publication with more detail on both occupational and industry projections is published online at <http://networks.nebraska.gov/analyzer/>. Look for additional articles spotlighting projections in upcoming issues of Nebraska Workforce Trends.

## Occupations with the Greatest Numeric Changes in Employment 2008-2018

	SOC Title	2008 Estimated Employment	2018 Projected Employment	Growth Openings	Replacement Openings	Total Openings	Numeric Change	% Change
Growing	Truck Drivers, Heavy and Tractor-Trailer	15,195	19,336	4,141	2,719	6,860	4,141	27.3%
	Customer Service Representatives	12,752	15,583	2,831	4,013	6,844	2,831	22.2%
	Combined Food Preparation and Serving Workers, Including Fast Food	7,781	9,598	1,817	1,650	3,467	1,817	23.4%
	Retail Salespersons	12,342	13,826	1,484	3,443	4,927	1,484	12.0%
	Accountants and Auditors	4,587	5,727	1,140	775	1,915	1,140	24.9%
	Declining	Telemarketers	3,138	2,738	0	789	789	-400
Order Clerks		2,052	1,666	0	581	581	-386	-18.8%
Postal Service Mail Sorters, Processors, and Processing Machine Operators		711	575	0	65	65	-136	-19.1%
File Clerks		598	471	0	145	145	-127	-21.2%
Packers and Packagers, Hand		1,958	1,856	0	326	326	-102	-5.2%

# Recession in Nebraska

AARON ZISKA, RESEARCH ANALYST



The Nebraska Department of Labor recently released the “Recession in Nebraska” publication; a focus on the effect of the previous four recessions on Nebraska’s economy. The project looks at some of the more common data used to study economic patterns such as unemployment figures, output, inflation, and international trade accounts. It studies the correlation between the economic impact on Nebraska figures in relation to the United States to explain the local area effects in Nebraska. Focusing strongly on comparisons between macroeconomic variables helps highlight and explain the depth and severity of each recession covered throughout the publication. The figures are used to give a better understanding of the possible causes the recessions and pinpoint where the effects of each recession were felt the strongest.

The study can be accessed in the publications section of Labor Market Information’s website at [networks.nebraska.gov/analyzer](http://networks.nebraska.gov/analyzer)

NEworks - Publications

**Nebraska Licensed Occupations**  
Occupations in Nebraska requiring licensing or certification, including a description of each occupation, contact information for the licensing authority, licensing requirements and fees.  
[View \(6.1 MB\)](#)

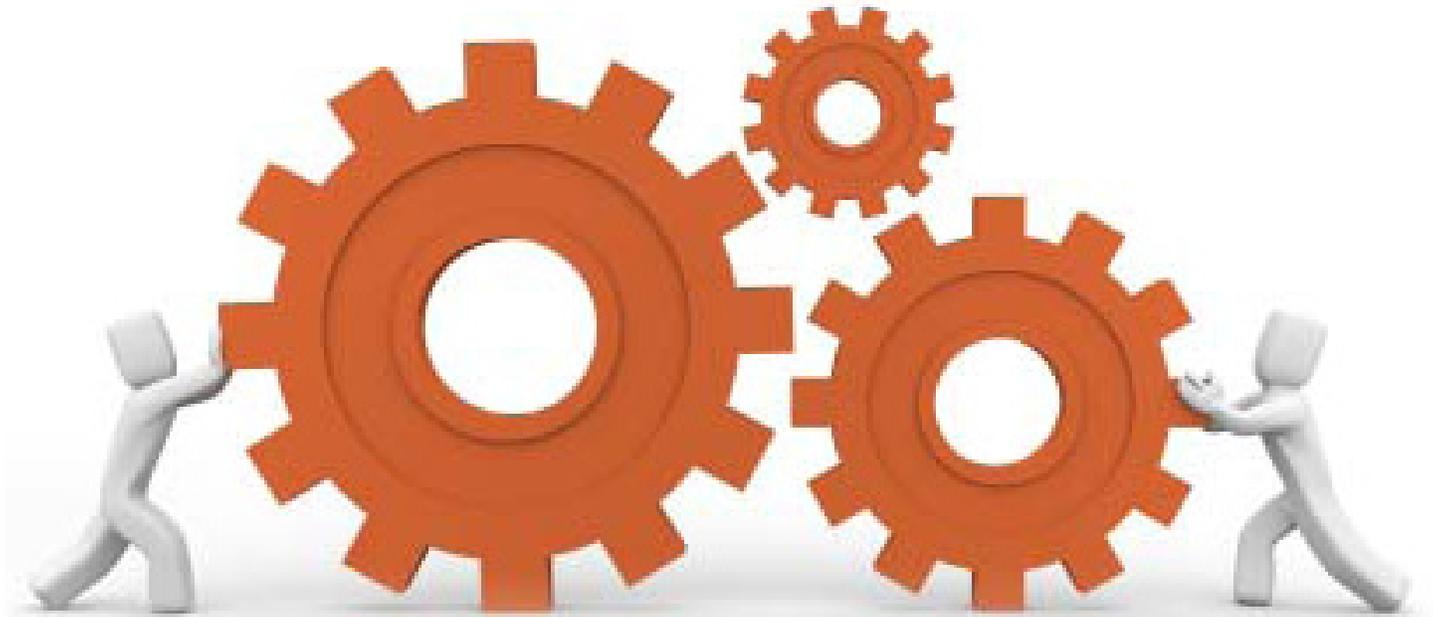
**Recession in Nebraska**  
An historical look at Nebraska's labor market through the last four recession periods.  
[View \(9.3 MB\)](#)

**Graduate Outcomes in Nebraska**  
Examines where 2007-2008 graduates are working in the first quarter of 2009. The analysis includes demographics, wages, industry information, and more.  
Choose a Participating College...

**Nebraska Occupational and Industry Projections**  
The Nebraska Occupational and Industry Projections Publication gives an overview and analysis of the projections by industry or occupation. Several tables and graphs are included for each type of projection along with written narrative. This narrative gives more details of occupations or industries as well as regional highlights.



# INDUSTRY DEVELOPMENTS



*Responsibilities for the Current Employment Statistics (CES) estimates of monthly industry employment for the state and metropolitan areas (Lincoln & Omaha) changed from the Nebraska Department of Labor to the Bureau of Labor Statistics (BLS) in April 2011. This transition happened in all states. Concurrent with this transition, BLS implemented several methodological changes to the estimation approach across states. The new estimation process reduces local economic knowledge in the process and may result in more month to month variability of the estimates, particularly in the smaller states. More detailed information on the changes to procedures for producing CES estimates is available on the BLS Web site at <http://www.bls.gov/sae/cesprocs.htm>*

## TOTAL NONFARM

JANET DENBRING

Nationally, over-the-month non-seasonally adjusted employment remained stable (0.1% or 118,000 jobs), a normal occurrence in August. Seven of the ten industries were flat. The vast majority of the monthly gain came from Professional and Business Services (101,000 jobs) due to the growth in Administrative and Waste Services (93,200 jobs). Over-the-year non-seasonally adjusted employment gained 1,282,000 jobs (1.0%). In 2011, it has consistently improved from 0.7% to 1.1% each month. During the majority of the past twelve months, the highest over-the-year growth industry has been Professional and Business Services (502,000 jobs), with almost half of the increases occurring in Administrative and Waste Services (249,700 jobs).

Since last month, Nebraska Total Nonfarm remained even (0.1% or 587 jobs), a common event in August. Six of the ten industries were unchanged. Over the year, Total Nonfarm employment expanded by 16,013 to 956,754 jobs (1.7%). Since January 2011, over-the-year employment has consistently improved the most in Professional and Business Services and Trade, Transportation, and Utilities. Since last August, they added 8,335 jobs and 5,496 jobs respectively. Together, they have made up 61% to 86% of the annual growth each month of 2011.

Over the month, the Lincoln MSA employment remained steady at 173,784 jobs (-0.1% or -123 jobs). Since August 2010, employment has increased by 4,062 jobs with majority of gains in Professional and Business Services (1,975 jobs) and Trade, Transportation, and Utilities (1,279 jobs). In the Omaha MSA, over-the-month employment held stable at 464,726 (0.1% or 225 jobs). Over the year, the total gain of 5,500 jobs came mostly from Professional and Business Services (3,098 jobs) and Trade, Transportation, and Utilities (2,808 jobs).

## MINING AND CONSTRUCTION

Over the month, statewide employment in Mining and Construction declined by 1,057 (-2.3%) to 44,604 jobs, which is a larger drop than usual for August. Over the year, employment decreased by -1.7%.

In the Lincoln MSA, over-the-month employment dropped by 115 jobs (-1.7%) to 6,707 workers, which is abnormal compared to its past history of remaining stable from July to August. Over the year, it cut out 477 workers (-6.6%).

Currently in August, there are 20,880 workers in the Omaha MSA. Since August 2010, employment dropped by 1,149 jobs with half of the decrease occurring in Specialty Trade Contractors (-685 jobs).

## MANUFACTURING

From July to August this year, statewide Manufacturing was unchanged at 95,269. August's over-the-year increase of 3.8% (3,447 jobs) adds to its consecutive growth from 1.4% to 3.8% since December 2010. Over-the-year employment in Durable Goods rose by 2,105 jobs (5.1%) and Non-Durable Goods gained 1,324 jobs (2.7%).

Since last month, Lincoln MSA employment decreased 148 jobs to 12,745. Employment in the Omaha MSA expanded by 0.7% in August. Over the year, it has grown every month in 2011.



## TRADE, TRANSPORTATION, AND UTILITIES

Since last month, statewide employment was essentially unchanged at 201,102 jobs (-0.2% or -412). Since August 2010, employment improved by 5,496 jobs (2.8%). Over half of the year's gains have been due to Transportation, Warehousing, and Utilities increasing by 3,469 jobs (7.0%).

Over the year, Lincoln MSA employment rose by 1,279 jobs (4.0%). Retail Trade (784 jobs, 4.5%) contributed the most to the gains in the past year. Over the past year, Omaha MSA employment advanced by 2,808 jobs (3.0%). Retail Trade progressed by 1,855 jobs and Transportation, Warehousing, and Utilities delivered an increase of 1,143 jobs since last August.

## INFORMATION

Nationally, over-the-month non-seasonally adjusted employment fell by -1.6% in August. Decreases larger than -1.0% usually only occur in January (from -1.0% in January 2006 to -2.2% in January 2009). Over the year, Information employment declined by -2.9%.

Statewide over-the-month employment held steady (0.1%

or +12) at 17,239 jobs. Since August 2010, employment increased by 2.2% (369 jobs). This is the first time it has shown over-the-year growth over 2.0%. Since January 2002, there have only been three months with over-the-year growth greater than 1.0%.

Since August 2010, employment in the Lincoln MSA has advanced to 2,165 jobs (0.9%). In the Omaha MSA, over-the-year employment contracted to 10,628 jobs (-4.2%).

## PROFESSIONAL AND BUSINESS SERVICES

Since March 2011, Nebraska monthly employment has constantly grown to reach 110,942 workers, with the majority of the expansion coming from Administrative and Waste Services. Since last month, employment in August added 0.6%. Over-the-year employment grew the most numerically (8,335 jobs) and posted the highest percentage rate (8.1%) of any month since July 2002. It has increased over 6.0% in only seven months during the past nine years. The majority of the yearly employment growth came from Administrative and Waste Services gaining 13.3% since August 2010 (5,749 jobs).

Over the year, Lincoln MSA employment rose by 1,975 to 19,927 jobs (11.0%). Administrative and Waste Services made up more than half (1,134) of the jobs in the past year. In the Omaha MSA, over-the-year employment expanded by 3,098 jobs to 67,174 (4.8%). Over half of the growth (1,720 jobs) is attributable to Administrative and Waste Services gains.

## EDUCATION AND HEALTH SERVICES

Over-the-month employment in Nebraska showed little movement at 134,843 jobs (-0.1% or -76 jobs). In the past five years, it has averaged a gain of 0.8% from July to August. Statewide, over-the-year employment remained stable by declining by only 636 jobs (-0.5%) in August, which is the first loss it has had since August 2009 (-0.4%).

After posting continual over-the-year losses from July 2010 to June 2011, ranging from -0.7% to -2.7%, employment in the Lincoln MSA has expanded the past two months (2.5%,



	Number of Workers			Over the Month		Over the Year	
	Aug-11	Jul-11	Aug-10	Numeric Change	Percent Change	Numeric Change	Percent Change
<b>Total Nonfarm</b>	<b>956,754</b>	<b>956,167</b>	<b>940,741</b>	<b>587</b>	<b>0.1%</b>	<b>16,013</b>	<b>1.7%</b>
<b>Mining, Logging &amp; Construction</b>	<b>44,604</b>	<b>45,661</b>	<b>45,355</b>	<b>-1,057</b>	<b>-2.3%</b>	<b>-751</b>	<b>-1.7%</b>
Construction	8,907	9,063	9,119	-156	-1.7%	-212	-2.3%
Heavy and Civil Engineering Construction	6,754	6,820	6,684	-66	-1.0%	70	1.1%
Specialty Trade Contractors	28,898	29,322	28,590	-424	-1.5%	308	1.1%
<b>Manufacturing</b>	<b>95,269</b>	<b>95,261</b>	<b>91,822</b>	<b>8</b>	<b>0.0%</b>	<b>3,447</b>	<b>3.8%</b>
Durable Goods	43,702	43,712	41,597	-10	0.0%	2,105	5.1%
Non-Durable Goods	51,567	51,549	50,225	18	0.0%	1,342	2.7%
<b>Trade, Transportation, &amp; Utilities</b>	<b>201,102</b>	<b>201,514</b>	<b>195,606</b>	<b>-412</b>	<b>-0.2%</b>	<b>5,496</b>	<b>2.8%</b>
Wholesale Trade	40,839	41,455	40,523	-616	-1.5%	316	0.8%
Retail Trade	106,072	106,452	103,979	-380	-0.4%	2,093	2.0%
Transportation, Warehousing, and Utilities	54,191	53,607	51,104	584	1.1%	3,087	6.0%
<b>Information</b>	<b>17,239</b>	<b>17,227</b>	<b>16,870</b>	<b>12</b>	<b>0.1%</b>	<b>369</b>	<b>2.2%</b>
<b>Financial Activities</b>	<b>69,008</b>	<b>68,925</b>	<b>68,887</b>	<b>83</b>	<b>0.1%</b>	<b>121</b>	<b>0.2%</b>
Finance and Insurance	59,916	59,900	59,843	16	0.0%	73	0.1%
Real Estate and Rental and Leasing	9,092	9,025	9,044	67	0.7%	48	0.5%
<b>Professional &amp; Business Services</b>	<b>110,942</b>	<b>110,307</b>	<b>102,607</b>	<b>635</b>	<b>0.6%</b>	<b>8,335</b>	<b>8.1%</b>
Professional, Scientific, and Technical Services	44,163	43,877	42,440	286	0.7%	1,723	4.1%
Management of Companies and Enterprises	17,820	17,954	16,957	-134	-0.8%	863	5.1%
Admin & Support & Waste Mngmt & Remdtn Srvcs	48,959	48,476	43,210	483	1.0%	5,749	13.3%
<b>Education &amp; Health Services</b>	<b>134,843</b>	<b>134,919</b>	<b>135,479</b>	<b>-76</b>	<b>-0.1%</b>	<b>-636</b>	<b>-0.5%</b>
Educational Services	16,575	16,361	16,208	214	1.3%	367	2.3%
Health Care and Social Assistance	118,268	118,558	119,271	-290	-0.2%	-1,003	-0.8%
<b>Leisure and Hospitality</b>	<b>85,752</b>	<b>85,707</b>	<b>84,809</b>	<b>45</b>	<b>0.1%</b>	<b>943</b>	<b>1.1%</b>
Arts, Entertainment, and Recreation	14,123	14,150	14,151	-27	-0.2%	-28	-0.2%
Accommodation and Food Services	71,629	71,557	70,658	72	0.1%	971	1.4%
<b>Other Services</b>	<b>37,182</b>	<b>36,979</b>	<b>37,026</b>	<b>203</b>	<b>0.6%</b>	<b>156</b>	<b>0.4%</b>
Repair and Maintenance	9,786	9,717	9,896	69	0.7%	-110	-1.1%
Personal and Laundry Services	7,667	7,588	7,764	79	1.0%	-97	-1.3%
Religious, Grantmaking, Civic, Profssnl, & Sim Orgs	19,729	19,674	19,366	55	0.3%	363	1.9%
<b>Government</b>	<b>160,813</b>	<b>159,667</b>	<b>162,280</b>	<b>1,146</b>	<b>0.7%</b>	<b>-1,467</b>	<b>-0.9%</b>
Federal Government	16,576	16,633	17,224	-57	-0.3%	-648	-3.8%
State Government	39,436	38,918	39,133	518	1.3%	303	0.8%
Local Government	104,801	104,116	105,923	685	0.7%	-1,122	-1.1%

1.8% respectively). After an unusual over-the-month increase of 0.8% in June, Omaha MSA employment dropped in both July (-0.5%) and August (-0.7%). It showed little movement over the year (0.4%).

### LEISURE AND HOSPITALITY

From July to August, statewide employment was essentially unchanged (0.1%). August did not post its usual growth this month, though employment increased in July when it usually decreases. Over-the-year employment expanded 943 jobs. The majority of the yearly growth is due to Limited-Service Eating Places gaining 645 jobs.

In the Lincoln MSA, over-the-year employment gains of 4.2% were posted for May to July of this year; however, August's growth is only 2.2%. Over-the-year employment expansion in the Omaha MSA has ranged from 0.9% to 1.8% during the

past four months.

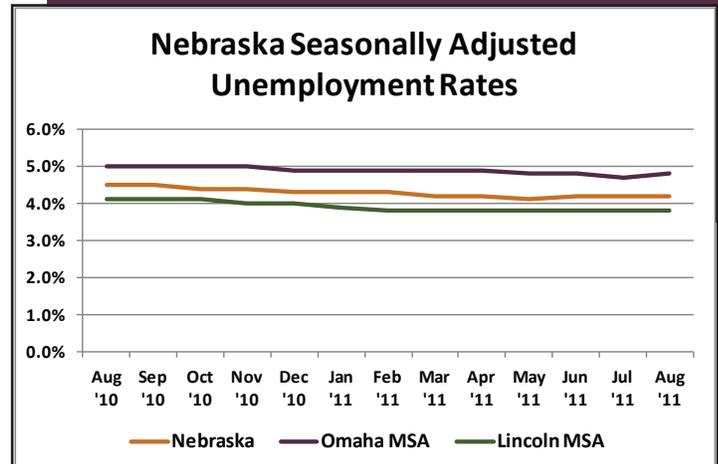
### OTHER SERVICES

Since last month, statewide employment rose with small gains spread across all three subsectors. Over-the-year employment had been expanding since January 2007 to June 2011 with percentages ranging from 0.3% to 4.3%. That trend changed in July as over-the-year employment was down 278 workers (-0.7%). In August, it evened out to be stable (0.4% or 156 jobs). Religious, Grantmaking, Civic, Professional, and Similar Organizations contributed 363 jobs (1.9%) to the increase this month.

From August 2010 to August 2011, the Lincoln MSA employment trended up by 0.8%. Over-the-year employment in the Omaha MSA has been steadily growing by 0.6% or more since May 2008.

## Facts Sheet

**Note:** Retail Sales figures are in billions of dollars. Median Employment Wages are OES 50th percentile Annual Wage for All Occupations. Crude Oil Price is as of the close of business on the last Thursday of the month. ECI is Employment Cost Index. PPI is Producer Price Index. CPI is Consumer Price Index.



National Indicators	Date	Value
GDP Growth	11Q2	1.0%
Unemployment Rate	Aug-11	9.1%
Fed Interest Rate	Aug-11	0.25%
Current Account Balance	11Q2	-\$118.0 Billion

Nebraska Indicators	Date	Value
Unemployment Rate	Aug-11	4.2%
House Value Appreciation	11Q2	-1.05%
Average Weekly Manufacturing Hours	Aug-11	40.7
Net Taxable Retail Sales	Jun-11	\$2.187 Billion
Median Employment Wages	11Q2	\$30,575

Pricing Indicators	Date	Value
Barrel of Crude Oil	Sep-11	\$83.56
ECI Change	11Q2	0.70%
PPI Change	Aug-11	0.00%

	August 2011			Indexes		% Change From	
	Aug-11	Jul-11	Aug-10	Jul-11	Aug-10	Jul-11	Aug-10
U.S. All Items	226.545	225.922	218.312	0.3%	3.8%		
Midwest Urban All Items	216.586	216.099	208.639	0.2%	3.8%		
Northeast Urban All Items	243.033	242.282	234.150	0.3%	3.8%		
South Urban All Items	220.471	219.682	211.308	0.4%	4.3%		
West Urban All Items	228.222	227.805	221.523	0.2%	3.0%		

Sources: tradingeconomics.com, bls.gov, fhfa.gov, revenue.state.ne.us, oil-price.net

Nebraska Workforce Trends is published by the Nebraska Department of Labor - Labor Market Information Center in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

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