



CAPITAL ASSOCIATED INDUSTRIES, INC.

Partners for a better workplace.

NORTH CAROLINA

Wage & Salary

SURVEY



2004 Edition

Proper Use of Capital Associated Industries' Wage & Salary Survey

The information contained in this survey has been furnished by participating employers in response to a confidential questionnaire submitted to them by Capital Associated Industries, Inc. The questionnaire requested data concerning wages and salaries being paid and related compensation information.

The CAI Wage & Salary Survey is intended to be used solely as information to assist management in evaluating wage, salary and other compensation-related decisions. In collective bargaining, the survey should be used to aid in determining the employer's positions and alternatives in advance of bargaining, and as a management reference during bargaining, but removed from the actual bargaining sessions. For both legal and practical reasons, it is suggested that no direct use of, or reference to, the survey be made at the bargaining table.

The survey data is furnished by the participating employers on a confidential basis. Confidentiality has been protected in reporting the final survey results.

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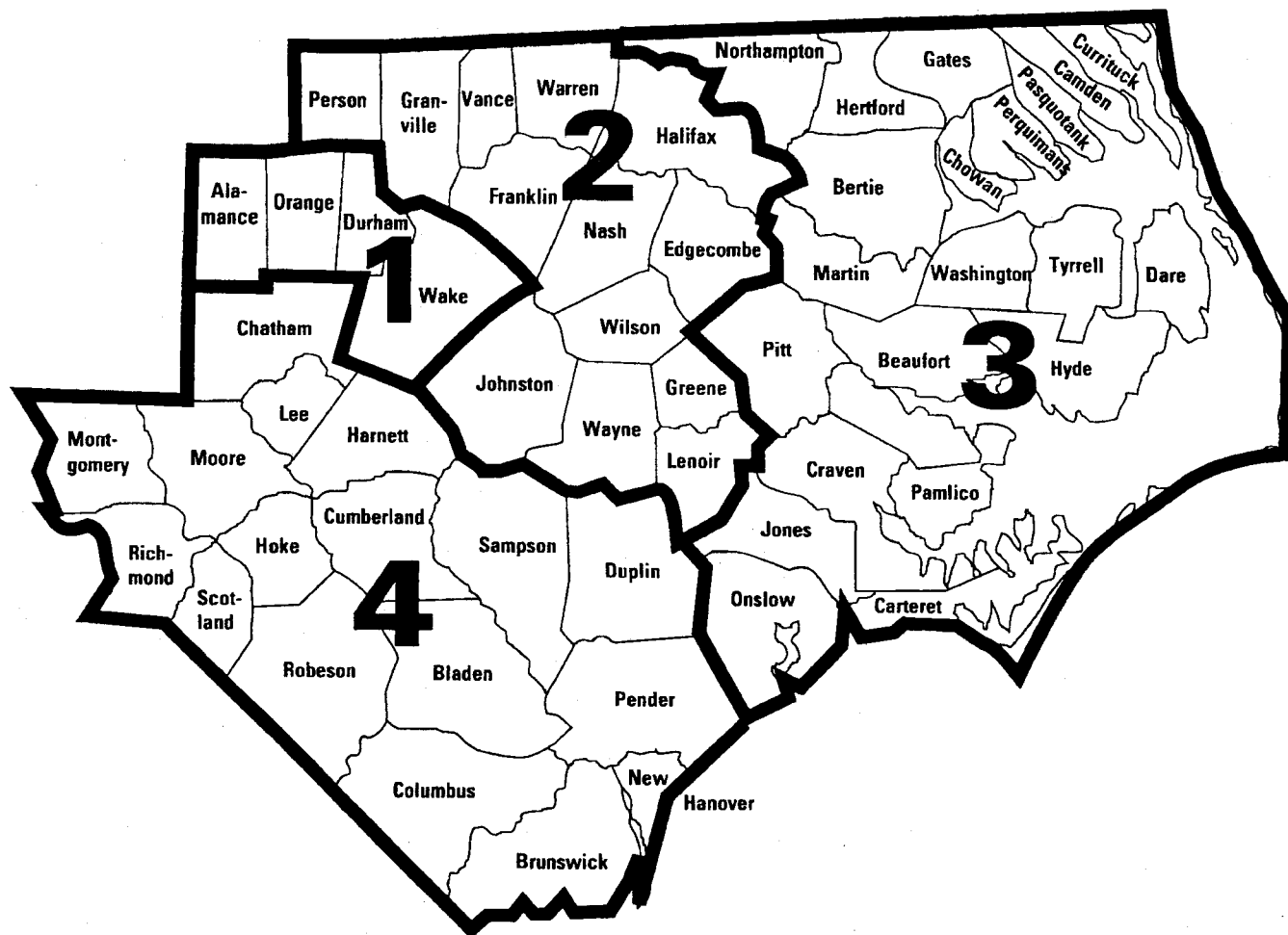
The Capital Associated Industries' Wage & Salary Survey is the exclusive property of Capital Associated Industries, Inc. Anyone other than CAI members desiring to use the information should contact the Association in writing at the address below to obtain permission to use the survey data.

CAI Wage & Salary Survey Price

CAI member participating in survey	one copy free of charge; additional copies \$25.00 each (plus tax)
Non-participating CAI member	\$195.00 each (plus tax)
Non-participating non-CAI members	\$500.00 each (plus tax)

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N.C. Geographic Survey Areas



Analysis of Participating Organizations - 2004

(Number of organizations participating)

Mfs	Nonmfs	Total	Area 1	Area 2	Area 3	Area 4
194	213	407	213	88	35	71

Survey data is presented for four areas, plus Raleigh/Durham/Triangle Pacesetter Organizations* and North Carolina State Government. The above map shows boundaries of the four areas. The format provides you with job comparisons for each reporting area along with the job description for each job. The four areas shown above will include the counties listed below:

Area 1 - Alamance, Durham, Orange, Wake

Area 2 - Edgemcombe, Franklin, Granville, Greene, Halifax, Johnston, Lenoir, Nash, Person, Vance, Warren, Wayne, Wilson

Area 3 - Beaufort, Bertie, Camden, Carteret, Chowan, Craven, Currituck, Dare, Gates, Hertford, Hyde, Jones, Martin, Northampton, Onslow, Pamlico, Pasquotank, Perquimans, Pitt, Tyrrell, Washington

Area 4 - Bladen, Brunswick, Chatham, Columbus, Cumberland, Duplin, Harnett, Hoke, Lee, Montgomery, Moore, New Hanover, Pender, Richmond, Robeson, Sampson, Scotland

*Pacesetter organizations are larger (600 or more employees) employers with facilities located in Area 1.

Definitions of Position Data

Job Title, Level, and Position Grade

Each position reported has a common job title and a generic description.

Level

Some positions have progressive levels reflecting increasing degrees of responsibility and job requirements. Level 1 is the lowest level of responsibility and job requirements.

Position Grade

Position Grades are shown beside each Job Title in parenthesis, as in grade (11). Position Grades are assigned according to the National Position Evaluation Plan grading system. Positions reported in *Hourly Rates* show grade 12 as the lowest skilled position and grade 1 as the highest skilled position. Positions reported in *Weekly and Monthly Salaries* show grade 1 as the lowest skilled position and grade 18 as the highest skilled position.

Total Responses

Total Responses reflects data reported by all organizations located in the four North Carolina Geographic Survey Areas (see page iii).

Geographical Area Size

Data reported by all organizations located in the four North Carolina Geographic Survey Areas is broken down according to employee size of each organization *located in the North Carolina survey area*. (Reported data applies only to employees located in the North Carolina survey areas.)

Classification

Manufacturing

All organizations reporting a Manufacturing NAICS Code of 3000.

Service Organization

All organizations reporting a Services NAICS Code of 5000, 6000, 7000, and 8000.

Other Non-Manufacturing Organizations

All organizations reporting a NAICS Code of 1000, 2000, 4000, and 9000.

Total Organization's Size

Data reported by all organizations located in the four North Carolina Geographic Survey Areas is broken down according to the *number of employees in the total organization* (local area, state-wide, national and international). (Reported data applies only to employees located in the North Carolina survey areas.)

N. C. State Government

Wage and salary rates reported for North Carolina State Government Employees.

Pacesetter Companies

Larger organizations with 600 or more employees with facilities located in Area 1 of the N.C. Geographic Survey Areas (see page iii).

Geographic Area

Breakout of organizations within each of the four N.C. Geographic Survey Areas (see page iii).

Increases, Projections, & Pay Patterns

2004 Wage & Salary Increase

The 2004 CAI Wage and Salary Survey results show overall nonexempt wages increased by 3.3 percent from March 2003 to March 2004. Salary increases for exempt employees averaged 3.4 percent and for executives 3.7 percent. Your attention is called to the fact that the percentage of increases reported are **averages** which include those organizations reporting “zero” increases. A number of firms gave substantially higher increases while others granted no increases. Consequently, the increase percentages **should be used only as a general guideline** in determining any action concerning your organization’s compensation program. Increase amounts also vary by industry and geographical area. The chart on page 13 shows the average percentage increases with and without “zero reports” included in the calculations.

Five Year Increase Pattern

Pay increase patterns for the past five (5) years are shown graphically on the following page for non-exempt, exempt, and executive levels. Comparison of pay adjustments to increases in the Consumer Price Index are provided for the same periods. (see page 12)

Increases Projected For 2005

Organizations planning increases in 2005 project an average 3.4 percent boost for non-exempt employees; 3.6 percent for exempt employees, and 4.0 percent for executive levels (see page 14). Organizations reporting “zero” increases are calculated in the averages.

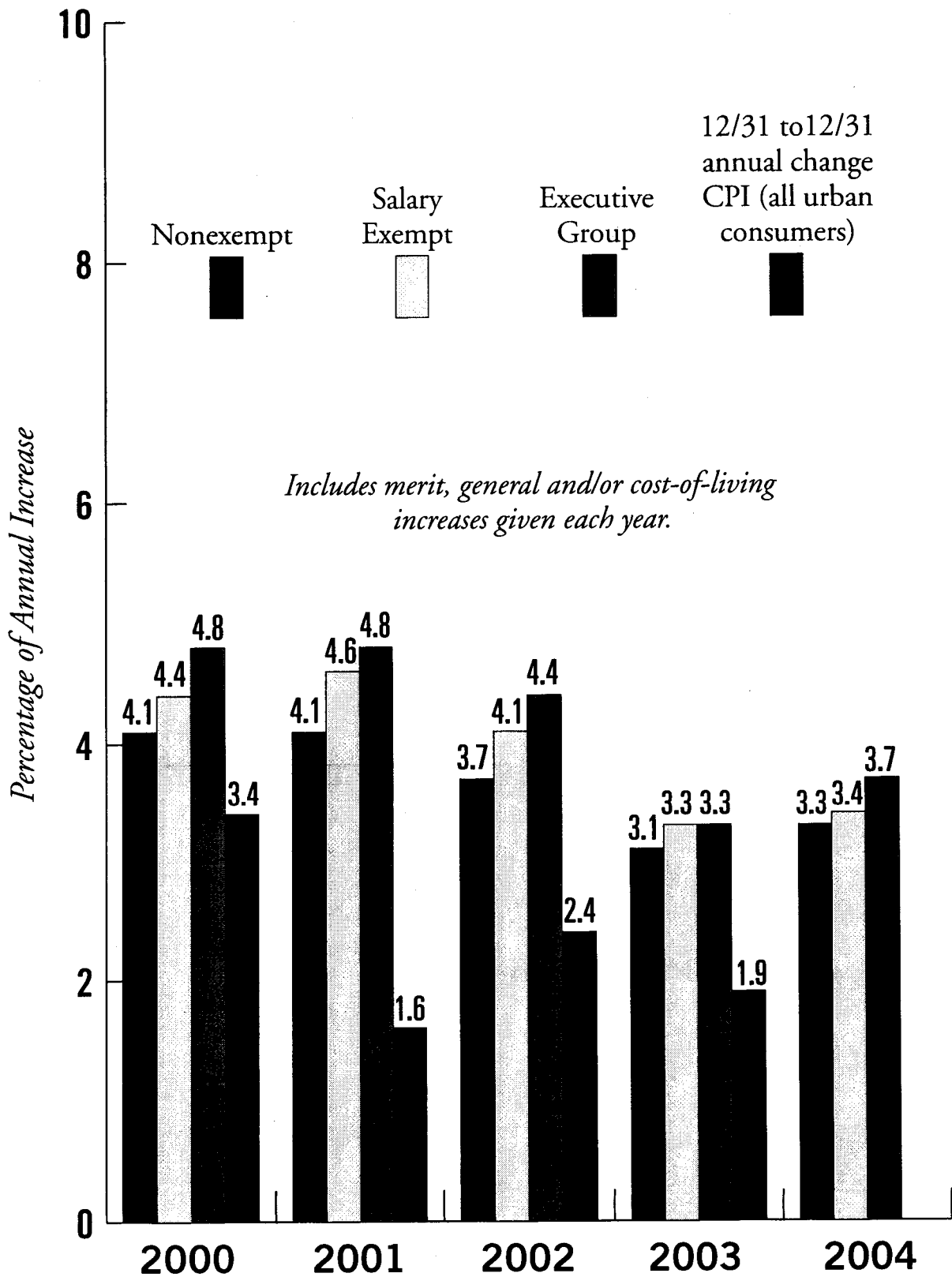
Three Year Actual vs. Budgeted Comparison

A three year average increase comparison of Actual versus Budgeted Amount by employee category is shown on page 15.

Overtime and fringe benefit adjustments are not included in any of the above figures.

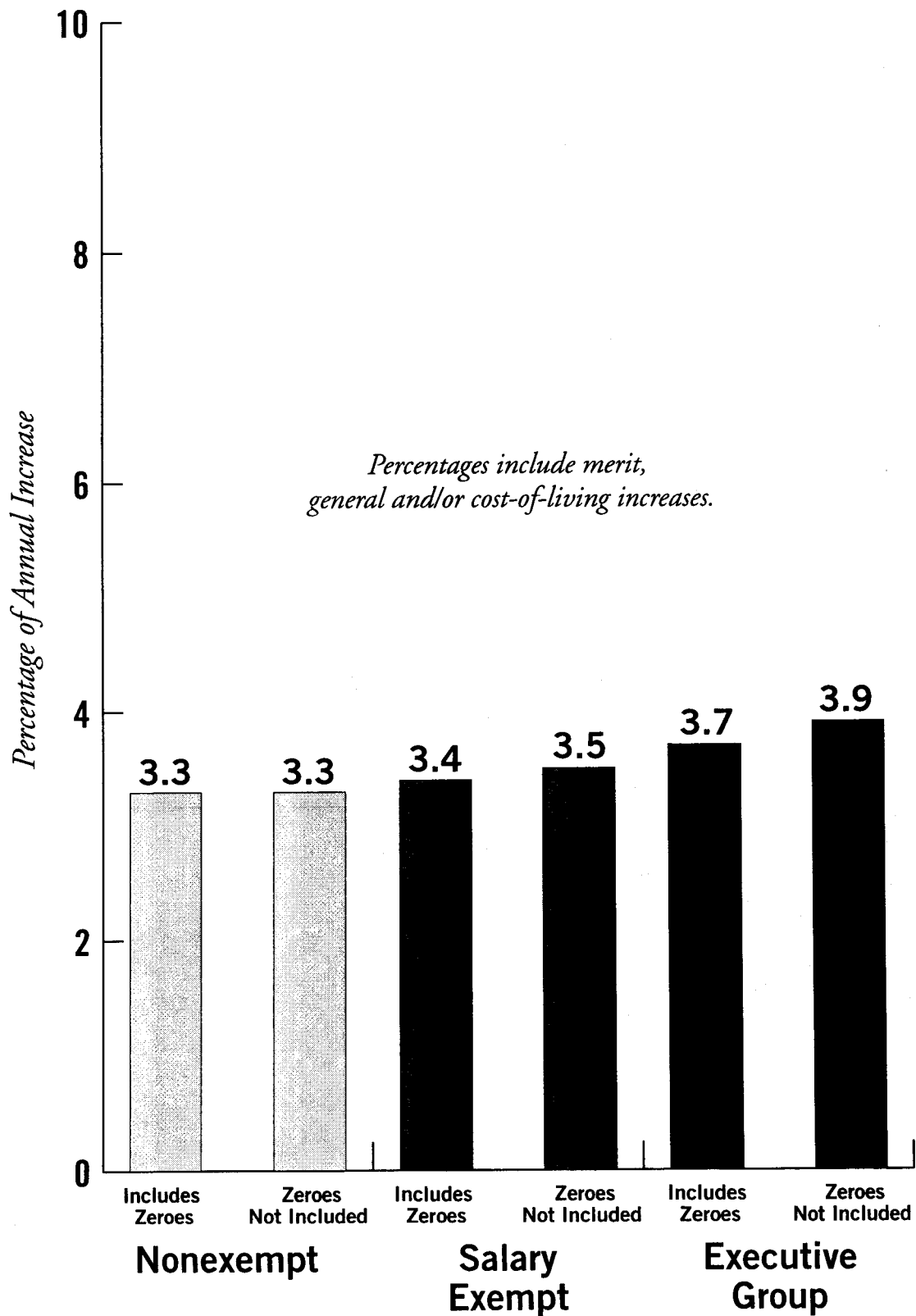
Average Pay Increase Trends 2000 - 2004

("Zero Reports" are included in these calculations.)



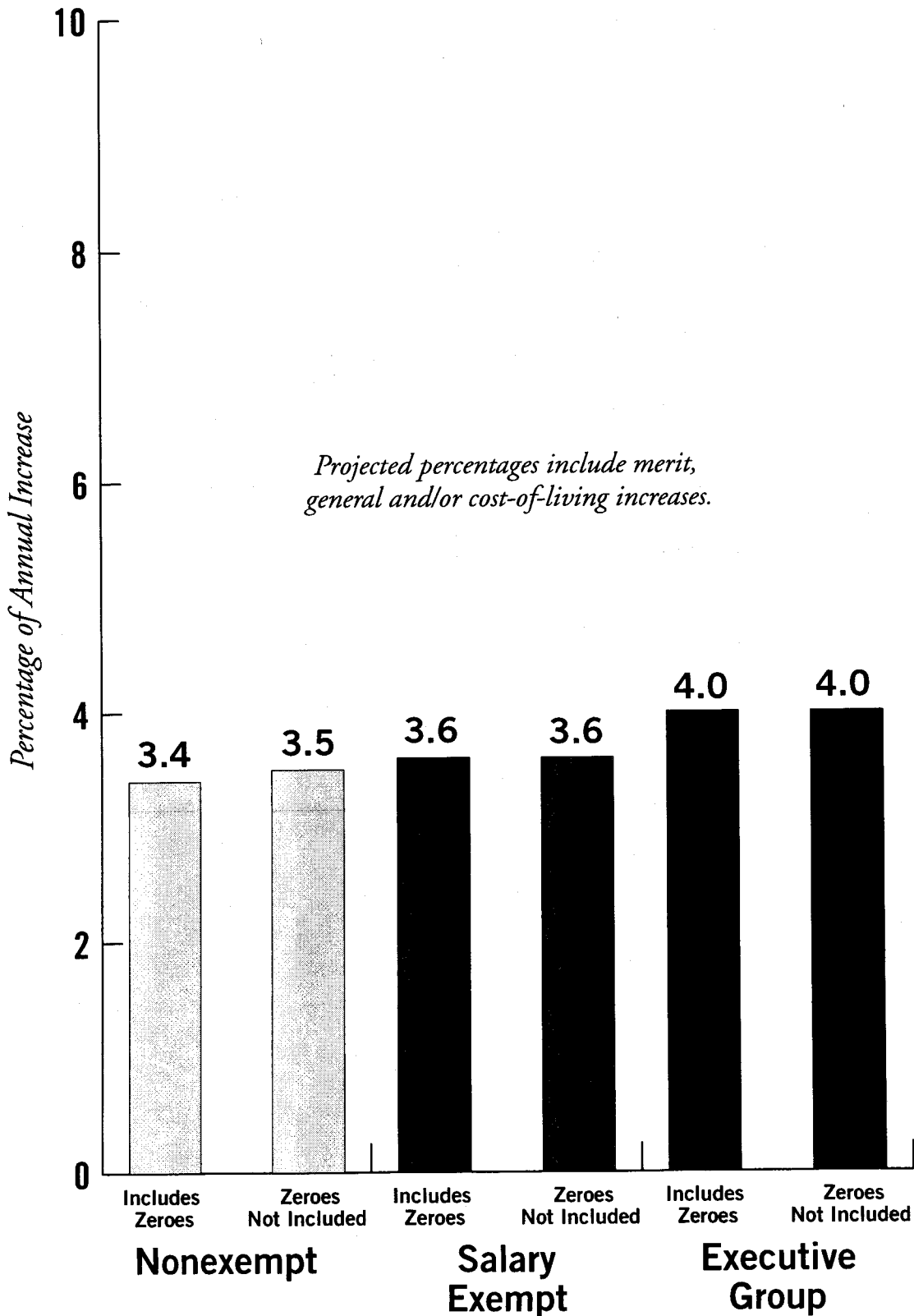
Wage and Salary Increases for 2004

(With and Without "Zero Reports" included in the calculations.)



Wage & Salary Increase Projection 2005

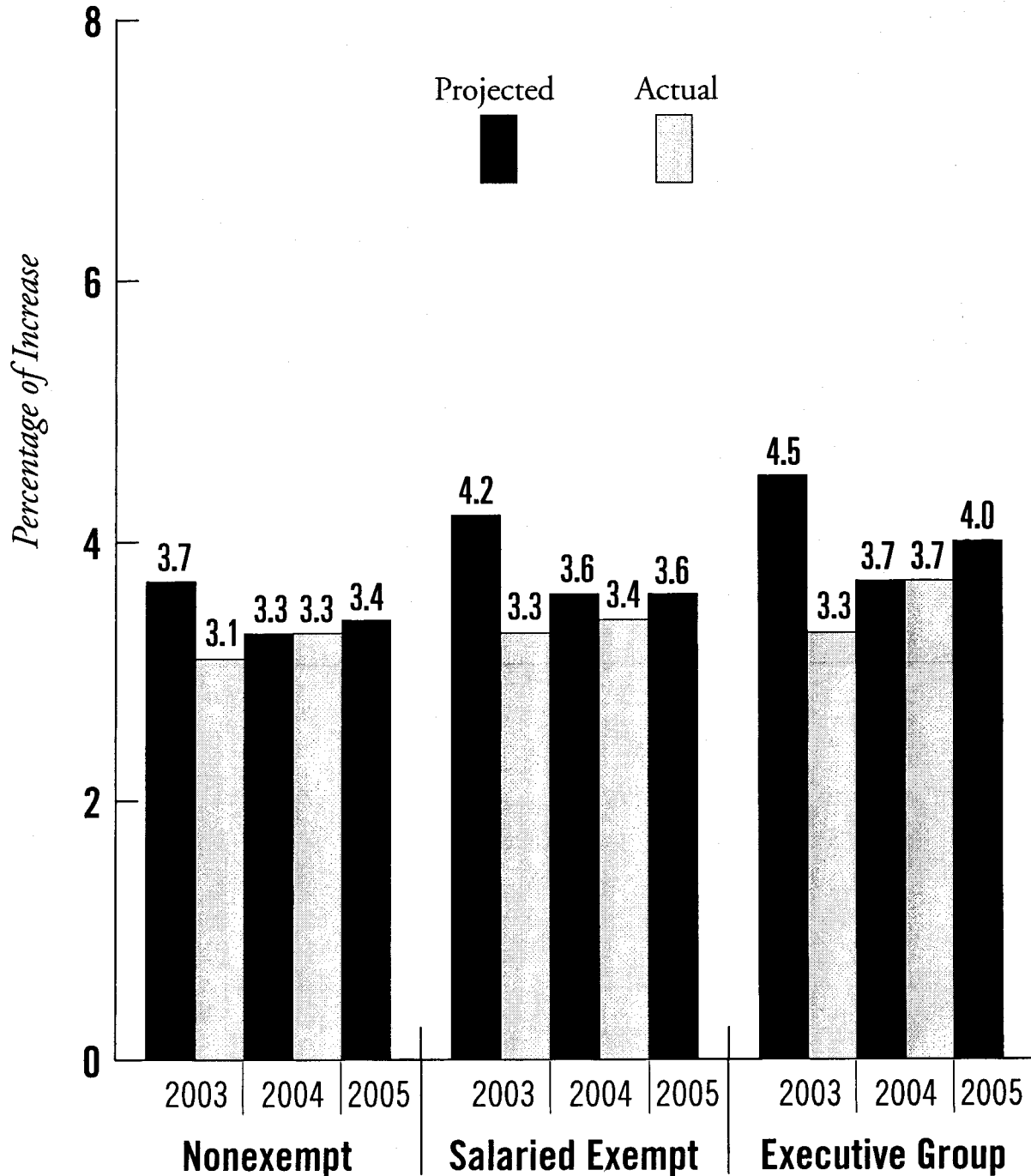
(With and Without "Zero Reports" included in the calculations.)



Three Year Comparison

Actual Average Increases vs. Projected Increases By Employee Category

(“Zero Reports” are included in these calculations.)



College Graduates Average Starting Salaries

Annual Salaries

College graduates hired since June 2003 with little or no directly related work experience

Field	Bachelor Degree	No. of Cos. Responding	Masters Degree	No. of Cos. Responding	Doctorate Degree	No. of Cos. Responding
Accounting	38,526	22	64,515	7		
Biological Sciences	32,892	14	44,959	4	47,757	2
Business Admin, Non-technical	36,264	15	43,735	3	47,812	3
Chemical Engineering	42,453	2				
Chemistry	37,153	5	43,611	3	56,410	2
Civil Engineering	48,412	4				
Communications/Journalism	28,732	3				
Computer Science	45,772	5	44,418	2	43,514	1
Economics/Finance	35,412	2	69,441	2		
Electrical Engineering	50,159	2				
Industrial Engineering	44,145	2				
Liberal Arts Studies	23,332	7				
Mechanical Engineering	49,147	6				
Nursing	39,530	2				
Sales/Marketing	36,304	16	53,602	1		
Other	35,357	19	51,002	1		

Type of Wage & Salary Adjustment Given

All figures are in percentages

Survey Date - March 2004

	Manufacturing	Non-Manufacturing	Total
Organizations giving General Across-the-Board Adjustments:			
Non exempt (Hrly or Salaried)			
Annually	30%	31%	31%
Other	4	5	5
Salaried Exempt			
Annually	22	19	20
Other	2	4	3
Executive Group			
Annually	15	14	15
Other	1	3	2
Organizations giving Merit Adjustments:			
Non exempt (Hrly or Salaried)			
Annually	59%	61%	60%
Other	9	10	10
Salaried Exempt			
Annually	70	73	72
Other	7	8	7
Executive Group			
Annually	55	61	58
Other	6	8	7
Organizations giving Profit/Income Growth or Improvement Adjustments:			
Non exempt (Hrly or Salaried)			
Annually	13%	15%	14%
Other	3	5	4
Salaried Exempt			
Annually	19	16	17
Other	3	5	4
Executive Group			
Annually	19	17	18
Other	3	5	4
Organizations giving Cost-of-Living Adjustments:			
Non exempt (Hrly or Salaried)			
Nonexempt	11%	13%	12%
Salaried Exempt			
Salaried	10	11	11
Executive Group			
Executive	7	8	8

2004 Increases & 2005 Projections

All figures are in percentages

Survey Date - March 2004

	Manu.	Non-Manu.	Total	Area 1	Area 2	Area 3	Area 4
<i>No Zeroes (Responses of 0 (zero) percent were not included in average calculations)</i>							
2004 Actual Adjustments							
Actual adjustment the typical employee received as a percentage of pay in 2004 (includes merit, general and/or cost-of-living):							
Non exempt (Hrly or Salaried)	3.4%	3.3%	3.3%	3.5%	3.2%	3.2%	3.1%
Salaried Exempt	3.6	3.3	3.5	3.6	3.4	3.3	3.3
Executive Group	4.1	3.8	3.9	4	4	3.1	3.9
2005 Projections							
Projected adjustment the typical employee will receive as a percentage of pay in 2005 (includes merit, general and/or cost-of-living) [if] planning adjustments for 2005:							
Non exempt (Hrly or Salaried)	3.5%	3.4%	3.5%	3.6%	3.4%	3.4%	3.2%
Salaried Exempt	3.6	3.6	3.6	3.8	3.5	3.5	3.4
Executive Group	4.1	3.9	4.0	4.3	3.7	3.6	3.8
<i>Zero Reports Included (Averages include respondents who explicitly stated 0 (zero) percent)</i>							
2004 Actual Adjustments							
Non exempt (Hrly or Salaried)	3.4%	3.2%	3.3%	3.4%	3.1%	3.2%	3.1%
Salaried Exempt	3.5	3.4	3.4	3.6	3.2	3.1	3.2
Executive Group	3.9	3.5	3.7	3.8	3.6	3	3.6
2005 Projections							
Non exempt (Hrly or Salaried)	3.5%	3.4%	3.4%	3.6%	3.3%	3.4%	3.1%
Salaried Exempt	3.6	3.6	3.6	3.8	3.4	3.5	3.3
Executive Group	4.0	3.9	4.0	4.2	3.7	3.6	3.6

2004 Incentive/Bonus Pay Practices

All figures are a percentage of all organizations surveyed

Survey Date - March 2004

	Manu.	Non-Manu.	Total	Area 1	Area 2	Area 3	Area 4
Organizations with incentive or bonus pay programs in place.	36%	33%	69%	36%	15%	6%	12%
Which of the following incentive/bonus pay plans are in place in your organization?							
Non-exempt (Hrly. or Salaried)							
1. Individual incentive pay	16%	24%	20%	21%	21%	11%	20%
2. Small group incentive pay (not gainsharing)	10	7	8	8	9	4	13
3. Gainsharing (formal plan)	8	7	7	6	11	7	9
4. Goalsharing	8	7	8	9	2	11	9
5. Commission pay	5	9	7	8	5	4	7
6. Profit sharing (non-retirement)	12	16	14	13	19	19	9
7. Spot/achievement award	19	28	24	34	16	7	11
8. Annual bonus	28	34	31	36	26	22	24
9. Other incentive/bonus program	16	16	16	16	19	19	11
Salaried Exempt							
1. Individual incentive pay	26%	33%	29%	37%	16%	15%	31%
2. Small group incentive pay (not gainsharing)	8	4	6	8	2	4	4
3. Gainsharing (formal plan)	6	4	5	6	5	4	4
4. Goalsharing	10	7	9	8	4	15	13
5. Commission pay	19	28	23	33	12	7	13
6. Profit sharing (non-retirement)	13	18	15	15	19	15	11
7. Spot/achievement award	17	26	22	31	14	7	9
8. Annual bonus	44	48	46	51	39	37	42
9. Other incentive/bonus program	14	19	16	18	18	15	9
Executive Group							
1. Individual incentive pay	19%	31%	25%	32%	14%	22%	18%
2. Small group incentive pay (not gainsharing)	6	2	4	6	4	4	2
3. Gainsharing (formal plan)	4	4	4	4	4	4	2
4. Goalsharing	5	7	6	8	4	7	4
5. Commission pay	11	16	14	19	7	7	9
6. Profit sharing (non-retirement)	11	17	14	14	16	15	11
7. Spot/achievement award	7	10	9	12	7	4	2
8. Annual bonus	46	52	49	53	44	41	49
9. Other incentive/bonus program	11	16	13	15	14	11	7
How frequently do eligible participants receive incentive/bonus pay?							
Non-exempt (Hrly. or Salaried)							
1. As part of regular pay check	7%	8%	8%	3%	14%	7%	13%
2. Monthly	7	7	7	10	2	7	7
3. Quarterly	14	14	14	10	19	15	18
4. Annually	43	50	46	50	49	33	38
5. Other	12	10	11	11	12	15	7

All Figures rounded to whole numbers. Totals may not equal parts.

2004 Incentive/Bonus Pay Practices

All figures are a percentage of all organizations surveyed

Survey Date - March 2004

	Manu.	Non-Manu.	Total	Area 1	Area 2	Area 3	Area 4
How frequently do eligible participants receive incentive/bonus pay? (continued)							
Salaried Exempt							
1. As part of regular pay check	4%	4%	4%	6%	2%	4%	1%
2. Monthly	12	12	12	16	2	7	16
3. Quarterly	17	20	19	22	11	19	18
4. Annually	63	67	65	68	61	56	64
5. Other	11	11	11	14	12	7	4
Executive Group							
1. As part of regular pay check	2%	4%	3%	3%	4%	4%	2%
2. Monthly	1	2	1	3	0	0	0
3. Quarterly	9	7	8	10	5	7	4
4. Annually	62	77	69	75	63	56	67
5. Other	6	8	7	8	9	7	4
What percentage of total cash pay does incentive/bonus pay represent?							
Non-exempt (Hrly. or Salaried)							
1. Up to 5%	47%	50%	49%	54%	42%	44%	40%
2. 6% to 10%	21	14	18	18	19	11	20
3. 11% to 15%	4	4	4	3	4	4	4
4. 16% to 25%	0	2	1	1	2	0	2
5. 26% to 50%	0	1	1	0	0	4	2
6. 51% or more	1	1	1	1	4	0	0
Salaried Exempt							
1. Up to 5%	26%	30%	28%	29%	21%	26%	33%
2. 6% to 10%	30	27	28	28	35	22	27
3. 11% to 15%	17	16	17	17	12	22	18
4. 16% to 25%	9	14	12	18	5	4	4
5. 26% to 50%	2	1	2	3	0	0	0
6. 51% or more	0	0	0	0	0	0	0
Executive Group							
1. Up to 5%	13%	18%	15%	16%	12%	7%	22%
2. 6% to 10%	14	15	15	16	18	7	11
3. 11% to 15%	14	7	11	12	11	15	7
4. 16% to 25%	11	15	13	14	14	15	4
5. 26% to 50%	13	21	17	22	12	11	9
6. 51% or more	4	4	4	6	2	0	4

All Figures rounded to whole numbers. Totals may not equal parts.

Guidelines For Using This Survey

Survey data came from information supplied by 407 participating organizations throughout central and eastern North Carolina representing approximately 75,000 employees, not including the State Government employees' wages and salaries also shown in the survey.

All reported data reflects base rates paid. *No supplementary payments* such as overtime or shift differentials are included.

Use of Grade Levels and Job Descriptions:

Survey data is reported in terms of a generally accepted point factor job evaluation plan for both hourly and salary classifications. Job descriptions are provided to assist you in determining general job content levels. However, in utilizing these descriptions, we urge you to be very careful, especially in determining the "going rate" for a particular job. CAI provides grade levels and job descriptions *only as a guide to general duties* and they are not a substitute for actual job evaluation.

Use of Survey Data:

The Wage and Salary Survey is a valuable tool for determining how a firm's pay structure relates to others in a given area. However, survey users should not attempt to use the reported measures of central tendency (averages or median) as absolute compensation standards. Many factors, such as changes in sample of participating firms or the level of employment in the community, can affect the data reported and the results obtained for individual job classifications from year to year. Care should therefore be exercised in utilizing survey data and specific results should be examined in the context of overall survey findings and the general economic situation prevailing at the time of the survey.

For convenience, CAI reports **Non-Exempt positions** as hourly and weekly rates (subject to the overtime provisions of the Fair Labor Standards Act) and **Exempt positions** as monthly rates (not subject to overtime provisions of the FLSA). It should be emphasized that our classification of exempt jobs is a guide only and should not be construed to indicate that jobs of similar titles and descriptions are always exempt. A definition of what constitutes an exempt classification can be found at the end of these guidelines.

Our goal in this Survey is to provide you with current, accurate, reliable and understandable wage and salary data *as a guide*, together with other data, in making informed decisions concerning your compensation policies. The information contained in this survey is furnished by participating firms on a confidential basis and you are requested to keep this confidence by restricting the use of the survey results to authorized personnel only.

Wage and Salary Data By Job Grades and Rate Ranges:

Another beneficial feature of this survey, made possible only because of grade level classifications with the National Position Evaluation Plan, is the grouping of all jobs by grade level classifications. Arithmetic and weighted averages are shown for all jobs in each grade. The "average" Midpoint and Rate Ranges are also shown for Hourly and Weekly positions by grade level. These summaries provide you with two important and useful tools:

1. It provides a common reference for comparing data on all CAI-evaluated jobs, regardless of titles. Many jobs are unique to only one or two companies or line of business. Since we only survey jobs in common use, the grade level summary provides a common basis for comparison since it indicates an equivalent value of job content for any job title.
2. It provides a guide or benchmark to compare rates for any individual job where reliable data might not be available due to small samples or reasonable job matches.

Guidelines For Using This Survey - continued

Definition Of Terms Used In This Survey:

Simple Average

This is the arithmetic mean. The sum of all "skilled/experienced" rates reported for the job divided by the number of organizations reporting the rates.

Weighted Average

This is the "skilled/experienced" rate reported by an organization for a job multiplied by the number of incumbents in the job in each reporting company. Totaled figures are then divided by all reported incumbents in the job. An example of the Simple and Weighted Average calculations is as follows:

Company	No. 1	No. 2	No. 3	No. 4	<i>No. Employees in Job</i>	<i>Skilled/Experienced Rate Paid</i>	<i>Total Wages</i>
	No. 1				5	7.50	37.50
	No. 2				2	7.00	14.00
	No. 3				7	10.00	70.00
	No. 4				11	9.50	104.50
Totals	4				25	\$34.00	\$226.00
	Simple Average		Weighted Average				
	$\frac{\$34.00}{4} = \8.50		$\frac{\$226.00}{25} = \9.04				

Percentile

25th Percentile

Twenty-five percent of the rates reported for a position *are less* than this rate.

Median

Half of the rates reported for a position are less than this rate and half are greater.

75th Percentile

Twenty-five percent of the rates reported for a position are greater than this rate.

The use of "average rates" may, when used alone, have its limitations. Primarily because, the smaller the sample, the greater the influence of each rate, which allows extremely high or low rates to exert an undue effect. It is important to consider the concentration of rates that may fall at the lower or upper levels. When the "Simple Average" and "Weighted Average" rates are compared to the "Median" rate, a better concept of the overall structure of a position's reported rates can be determined. Ideally, the Simple and Weighted Averages should not stray too far from the Median.

The twenty-five and seventy-five percentile rates give a good indication of the middle "range" of reported rates without the influence of the extremely high and low reported rates.

Average Entry Rate

This is the arithmetic mean or the sum of all "entry" rates reported for the job divided by the number of rates reported.

The "Average Entry Rate" should provide a helpful guide as to where most organizations would start a qualified but inexperienced person in a position.

Companies With Incentive/Bonus Pay

Number of Companies

Number of companies reporting that incentive/bonus pay is part of a position's compensation.

Average Percent of Base Pay

The average percent of a position's base pay that represents incentive/bonus pay for those companies reporting an incentive/bonus percentage. The percentage figure represents an average incentive/bonus amount an employee would receive in addition to their average base pay.

Guidelines For Using This Survey - continued

Wage and Salary Increase Patterns and Projections:

Other very useful features found in this survey are the Wage and Salary Increase Patterns and Projections. This section shows company practices or patterns for Cost of Living, General Across-the-Board and Merit Increases along with adjustment amounts and projections. There is also a section showing Hiring Rates for College Graduates for those firms hiring at the Bachelor, Masters Degree and Doctorate Level.

Exempt vs. Nonexempt Status

A nonexempt employee generally is one who is directly involved in hands-on production or administrative duties and, under wage-hour regulations, must be paid minimum wage and time-and-one-half for all hours worked over forty in a week.

There are four basic exemptions under federal wage and hour law that, if all qualifications are met, allow an employee to be "exempt" from being paid minimum wage and overtime. The four basic categories that fall under the "white collar" exemptions are the Executive (Supervisory), Administrative, Professional and Outside Sales exemptions.

Salaried (White Collar) Exemption From The Overtime Requirements Of The Fair Labor Standards Act

The exemption is self-executing—that is, no specific application for an exempt status is required. All of the essential tests, however, as prescribed by the Wage-Hour Administrator, must be met before an employee may be considered exempt. The duties performed by the employee, and *not the title of the job*, determine whether or not an employee can be considered exempt. The burden of establishing the exempt status of an individual employee rests with the employer. The regulations below are scheduled to go into effect August 23, 2004.

The Executive Employee Tests For Exemption:

- Primary Duty: Have a primary duty of management of the enterprise or of a customarily recognized department or subdivision.
- Supervision: Customarily and regularly directs the work of two or more employees and has the authority to hire or fire other employees, or provide suggestions and recommendations as to hiring, firing, advancement, promotion or any other change of status be given particular weight.
- Salary: \$455 or more a week, exclusive of board, lodging or other facilities.

The Administrative Employee Tests For Exemption:

- Primary Duty: The employee's primary duty must be the performance of office or non-manual work directly related to the management or general business operations of the employer or the employer's customers;
- Discretion: Customarily and regularly exercises discretion and independent judgment with respect to matters of significance.
- Salary: \$455 or more a week, exclusive of board, lodging or other facilities.

The Professional Employee Tests For Exemption:

- Primary duty: Performs work requiring advanced knowledge in a field of science or learning which is customarily acquired by a prolonged course of specialized intellectual instruction.
- Discretion: Consistently exercises of discretion and judgment, or includes work requiring invention, imagination, or talent in a recognized field of artistic endeavor.
- Salary: \$455 or more a week, exclusive of board, lodging or other facilities.

Guidelines For Using This Survey - continued

Outside Salesperson Tests For Exemption:

- Duties:** Customarily and regularly while off employer's premises makes sales of goods or services, or obtains orders or contracts for services or use of facilities. (Inside selling is not exempt.)
- Non-Exempt Work:** Work which is incidental to a particular salesperson's outside sales or solicitation, including incidental deliveries or collections, is considered exempt work. Attendance at sales conferences, is regarded as exempt work.
- Salary:** There is no minimum salary requirement.

Organizations Participating in the Survey

ABB Marketing & Sales (M&S) Inc.	Raleigh	Blue Cross Blue Shield of NC	Durham
Abbott Laboratories	Rocky Mount	BMCO Construction, Inc.	Lumberton
ACME Electric Corp	Lumberton	Boddie Noell Enterprises, Inc.	Rocky Mount
Acroprint Time Recorder Company	Raleigh	Boice-Willis Clinic	Rocky Mount
Aeroglide Corp.	Cary	Boramed, Inc.	Durham
Airtech Company, Inc.	Cary	Bowe Bell & Howell	Durham
Ajinomoto AminoScience LLC	Raleigh	Bromma, Inc.	Roxboro
ALARIS Medical Systems, Inc.	Creedmoor	Brown Orthopedic Surgery & Sports Medicine Center, P.A.	Dunn
Alcatel	Raleigh	BSH Home Appliances	New Bern
Allied Telesyn Networks, Inc.	Raleigh	Buehler Motor, Inc.	Cary
Alphanumeric Systems, Inc.	Raleigh	Builders Mutual Insurance Company	Raleigh
AlphaVax, Inc.	Durham	Burroughs Wellcome Fund	Research Triangle Park
ALSCO Metals Corporation	Raleigh	Butler Manufacturing Co	Laurinburg
American Social Health Association	Research Triangle Park	Capitol Broadcasting Company, Inc.	Raleigh
Amphora Discovery Corp.	Durham	Cardinal Health	Research Triangle Park
Anderson Automotive Group, Inc.	Raleigh	Carolina donor services	Greenville
Apex Cabinet Company	Apex	Carolina Eye Associates, PA	Southern Pines
APV	Goldsboro	Carolina Forge company	Wilson
Ark-Les Corp	Raleigh	Carolina Meadows	Chapel Hill
Arlington Press	Raleigh	Carolina Precast Concrete, Inc.	Dunn
Art.com	Raleigh	Carolina Sunrock Corporation	Butner
ArvinMeritor	Fayetteville	Carolina Turkeys	Mount Olive
ASMO, Greenville of NC, Inc.	Greenville	Carolina Vending	Raleigh
AT Ramar LLC	Research Triangle Park	Carver Machine Works, Inc.	Washington
ATF Industrial Automation	Apex	Cary Area EMS	Cary
Athenix Corp.	Durham	Cary Oil Co., Inc.	Cary
Atlantic Beverage, Inc	New Bern	Caterpillar	Cary
Atlantic Telephone Membership Corp.	Shallotte	Caterpillar	Sanford
Atlatl, Inc	Durham	Caterpillar	Smithfield
AW North Carolina, Inc.	Durham	Caterpillar	Clayton
Bandag, Inc.	Oxford	Catholic Diocese of Raleigh	Raleigh
Bayer	Clayton	Cato Research	Durham
Bayer CropScience	Research Triangle Park	CD Anderson	Raleigh
BD Biosciences Discovery Labware	Durham	Ceco Building Systems	Rocky Mount
BD Technologies	Research Triangle Park	CertainTeed	Oxford
Beaufort Marine Center Power Systems	Beaufort	Chatsworth Products, Inc.	New Bern
Befco, Inc.	Rocky Mount	Chloride Systems	Burgaw
Bekaert Fibre Technologies	Research Triangle Park	City of Oxford	Oxford
Bespak, Inc.	Apex	Clinforce, Inc.	Durham
BFS Industries, LLC	Butner	Closure Medical Corporation	Raleigh
Biogen Idec	Research Triangle Park	Coastal Beverage	Wilmington
BioStratum, Inc.	Durham	Coastal Federal Credit Union	Raleigh
Bland Landscaping Co	Cary	Coeur Inc	Washington
Blount, Inc.	Zebulon	Coharie Hog Farm	Clinton
		College Foundation, Inc.	Raleigh

Organizations Participating in the Survey, continued

Collins & Aikman	Roxboro	Educated Design & Development	Morrisville
ConAgra Foods, Inc.	Garner	Education and Training	
Conestoga Wood Specialties	Kenly	Systems International	Chapel Hill
Consolidated Diesel Company	Whitakers	Eisai Inc.	Research Triangle Park
Construction Systems, Inc.	Fayetteville	ElectriCities of NC, Inc.	Raleigh
Conveyor Technologies	Sanford	Electroswitch	Raleigh
Cooper Bussmann	Goldsboro	Elkay Southern	Lumberton
Cooper Crouse Hinds		Embrex, Inc.	Durham
Molded Products	La Grange	Emco Wheaton Retail Corp.	Wilson
Cooper Kenworth, Inc.	Durham	EMD Pharmaceuticals	Durham
Coty US, LLC	Sanford	Environ Products, Inc.	Smithfield
Cox NC Publications, Inc.	Greenville	Environmental Specialties	Raleigh
Craig Davis Properties, Inc.	Cary	Eye Care Associates	Raleigh
Critical Health Systems, Inc	Raleigh	Fayetteville Economic	
CTS	Durham	Development Corp.	Fayetteville
Custom Molders, Inc.	Durham	Fenner Drives	Manheim
Custom Molders, Inc.	Henderson	Field Controls LLC	Kinston
DAK Americas, LLC Fayetteville	Fayetteville	Fireside Distributors, Inc.	Raleigh
DAK Americas, LLC. Leland	Leland	FirstHealth of the Carolinas	Pinehurst
Dancik, Int.	Cary	Firstmark Aerospace Corp.	Durham
Del Laboratories	Rocky Point	Five Star Staffing, Inc.	Raleigh
Devil Dog Mfg. Co., Inc.	Zebulon	Food Bank of North Carolina	Raleigh
DIMON International Inc	Farmville	Fowler Contracting	Cary
Diosynth Biotechnology	Morrisville	Fresenius Kabi Clayton, LP	Clayton
Direct Distributors Inc	Garner	Freudenberg Spunweb Company	Durham
Distinctive Human Resources, Inc.	Sanford	Frontier Spinning Mill, Inc.	Sanford
DNA Group, Inc.	Raleigh	Fuji Silysia Chemical	Greenville
Dopaco, Inc.	Kinston	Girsberger Industries, Inc.	Smithfield
Draka Elevator Products	Rocky Mount	GKN	Durham
DSM Pharmaceuticals	Greenville	GKN Drive Line	Durham
Duke University and Health System	Durham	GKN Driveline Roxboro	Timberlake
Duplin County Economic		Glenoit LLC and Ex-Cell Home	
Development Commission	Kenansville	Fashions, Inc	Goldsboro
Duplin General Hospital	Kenansville	Global Knowledge	Cary
Durham Exchange Club		Global Software, Inc.	Raleigh
Industries, Inc. (DECI)	Durham	Goodman Concrete Company	Kinston
DynPro, Inc.	Durham	Goodwill Industries of Eastern NC	Durham
Eastern Maintenance		Goodyear-Belt Concepts	Spring Hope
And Services, Inc.	Dunn	Gould & Goodrich leather, inc.	Lillington
Eaton	Middlesex	Grady White Boats	Greenville
Eaton Corporation	Fayetteville	Greater Raleigh Chamber	
Eaton Corporation	Roxboro	of Commerce	Raleigh
Eaton Corporation	Selma	Greene County Health Care	Snow Hill
Edenton Dyeing & Finishing, LLC	Edenton	Gregory Poole Equipment Co.	Fayetteville
Edgecombe-Martin County EMC	Tarboro	Gregory Poole Equipment Co.	Wanchese

Organizations Participating in the Survey, continued

Gregory Poole Equipment Co.	Washington	Liberty Analytical Corp.	
Gregory Poole Equipment Co.	Wilmington	DBA Compuchem	Cary
Greystone Concrete Products, Inc.	Henderson	LifeCare Hospitals of NC	Rocky Mount
Hanson Aggregates, Inc.	Morrisville	Liggett Group Inc.	Mebane
Harris Teeter, Inc.	Matthews	Lineberry Research Associates	Research Triangle Park
Heater Utilities, Inc.	Cary	Lions Industries For The Blind, Inc.	Kinston
Henry's Tackle, LLC	Morehead City	LL Building Products	Burgaw
Hickory Springs Mfg., Co.	Hickory	Lloyd's Register Serentec	Raleigh
Highwoods Properties Co	Raleigh	Long Island Productions, Inc	Durham
Hog Slat, Inc.	Newton Grove	Lord Corporation	Cary
Honeywell International	Moncure	Louisiana pacific corporation	Wilmington
Hospice of Wake County	Raleigh	Lutheran Family Services	
Hospital Communications		in the Carolinas	Raleigh
Systems, Inc.	Raleigh	Luxfer Gas Cylinders	Graham
Howard Perry & Walston Realty, Inc.	Raleigh	LVL7 Systems, Inc.	Morrisville
Hunter Industries	Cary	Mackay Communications, Inc.	Raleigh
Hunton & Williams LLP	Raleigh	Magneti Marelli Powertrain Inc.	Sanford
ILS	Research Triangle Park	Majestic Marble & Glass Company	Raleigh
Incara Pharmaceuticals Corporation	Research Triangle Park	Manpower	Raleigh
Industrial Sheet Metal/Trane	Rockingham	Martin Marietta Materials	Raleigh
Interactive Medical Systems, Inc.	Raleigh	Maupin Taylor, P.A.	Raleigh
Interkordsa	Clarkton	Mayview Convalescent Center	Raleigh
ISA - The Instrumentation,		MBM Corporation	Rocky Mount
Systems, and Automation Society	Research Triangle Park	MCNC Research &	
J.T. DAVENPORT	Sanford	Development Institute	Research Triangle Park
Jackson Beverage Company	Wilmington	Medical Mutual Insurance Co. of NC	Raleigh
Janus Development Group, Inc.	Greenville	Medical Review	Cary
Johnston County Economic		Merck & Company, Inc.	Wilson
Development	Smithfield	Mestek, Inc.	Farmville
Johnston, Zabor, McManus, Inc.	Durham	Methodist Home for Children, Inc.	Raleigh
Kaba Ilco Corp.	Rocky Mount	Mims Distributing Company Inc.	Raleigh
KCST	Tarboro	Mine Safety Appliances	Jacksonville
Kennametal	Henderson	MJM Investigations, Inc.	Raleigh
Kennametal, Inc.	Weldon	Modus Media International	Morrisville
Kerr	Ahoskie	Moen Incorporated	Sanford
Kidde Aerospace	Wilson	Moen Incorporated - New Bern	New Bern
King Pharmaceuticals, Inc.	Kinston	Moorecraft Reels, Inc	Tarboro
Kinston Neuse Corporation	Kinston	Motor & Equipment	
KoSa	Wilmington	Manufacturers Association	Research Triangle Park
Laboratory Corporation of America	Burlington	Mt. Olive Pickle Company, Inc.	Mt. Olive
Laboratory Corporation of America	Burlington	MTS Sensors Division	Cary
Laser Image Corporate Printing	Durham	Mulkey Engineers and Consultants	Raleigh
Lee-Moore Oil Company	Sanford	Murdock Webbing Co., Inc.	Tarboro
Leiner Health Products, LLC	Wilson	Murphy-Brown LLC	Warsaw
Lenox China	Kinston	NACCO Materials Handling Group	Greenville

Organizations Participating in the Survey, continued

National Spinning Co. Inc.	Washington	Pinehurst Surgical Clinic, PA	Pinehurst
National Spinning Co., Inc	Washington	Pitt County Development	
National Spinning Co., Inc.	Washington	Commission	Greenville
National Spinning Co., Inc.	Washington	Plexus Technology Group	Raleigh
National Welders Supply Co.	Charlotte	PMW Products, Inc.	Raleigh
Neil Medical Group	Kinston	Polymer Group, Inc.	Benson
Nello L. Teer	Raleigh	Porta-Nails Inc.	Wilmington
New Bern Building Supply	New Bern	PPD	Wilmington
Newton Instrument Company	Butner	PPD Development	Wilmington
Nexans Berk-Tek Electronics Cable	Elm City	Procter & Gamble / Iams	Henderson
Nichols Foodservice, Inc.	Wallace	Purolator Air Filtration	Henderson
Noble Oil Services, Inc.	Sanford	Qualex, Inc.	Durham
Nomacor LLC	Zebulon	Quickie Manufacturing	Lumberton
North America Packaging Corporation	Raleigh	Raleigh Rescue Mission	Raleigh
North American Hoganas	Research Triangle Park	Ready Mixed Concrete Company	Raleigh
North Carolina Academy of Family Physicians, Inc.	Raleigh	Research Triangle Foundation of NC	Research Triangle Park
North Carolina Electric Membership Corporation	Raleigh	Research Triangle Institute	Research Triangle Park
North Carolina Office of State Personnel	Raleigh	Revlon, Inc.	Oxford
North Carolina Partnership for Children	Raleigh	Rex HealthCare	Raleigh
North Carolina Retired Governmental Employees' Assn	Raleigh	RFR Metal Fabrication, Inc.	Oxford
North Carolina State Ports Authority	Wilmington	Roanoke Electric Cooperative	Rich Square
North Carolina State University	Raleigh	Rockett, Burkhead & Winslow	Raleigh
North State Bank	Raleigh	Royal Home Fashions, Inc	Henderson
Novo Nordisk Pharmaceutical Industries, Inc.	Clayton	S&W Ready Mix	Clinton
Novozymes North America, Inc.	Franklinton	Salix Pharmaceuticals	Raleigh
Orion International Consulting Group, Inc.	Raleigh	Sampson-Bladen	Clinton
Oxford University Press	Cary	SAS	Cary
P.C.S. Phosphate Co., Inc.	Aurora	Schindler Elevator Corporation	Clinton
Parker Hannifin	Holly Springs	Schwarz BioSciences, Inc.	Research Triangle Park
Pepsi Bottling Ventures	Raleigh	Scynexis, Inc.	Durham
Performance, Inc.	Chapel Hill	SEI Electronics	Raleigh
Pergo, Inc.	Raleigh	Semiconductor Research Corporation	Durham
PharmaLink FHI	Research Triangle Park	Shallco Incorporated	Smithfield
Photo Chemical Systems Inc.	Knightdale	Siemens Power Transmission & Distribution	Raleigh
Piedmont Air Conditioning	Raleigh	Smith Debnam Narron Wyche Saintsing & Myers, LLP	Raleigh
Pinehurst Medical Clinic, Inc.	Pinehurst	Smithfield Packing Co.	Kinston
		Smithfield Packing Wilson Division	Wilson
		SMT, Inc.	Raleigh
		South Atlantic LLC	Pinehurst
		Southbend	Fuquay Varina
		Specialized Vehicles Corporation - Hackney NC Division	Washington

Organizations Participating in the Survey, continued

SpectraSite Communications, Inc.	Cary	Trimeris, Inc.	Durham
Stanadyne Corporation	Washington	Troxler Electronic Laboratories, Inc.	Research Triangle Park
Stanadyne Corporation	Jacksonville	TRW Automotive	Greenville
Standard Commercial Tobacco Co., Inc.	Wilson	Tyco Healthcare/Mallinckrodt - Pharmaceutical	Raleigh
Star Telephone	Clinton	Tyco Plastics	Battleboro
Steadman-Wade Health Services	Wade	Tyco/Healthcare/Mallinckrodt	Raleigh
Sterling Group Physician Services	Durham	U.S. Foodservice	Zebulon
Stonewood Insurance Management Co., Inc.	Raleigh	UAI Technology Inc.	Durham
Stony Creek Fire & Rescue	Rocky Mount	Umicore Cobalt Products	Laurinburg
Storr Office Environments	Raleigh	Umicore Marketing Services USA Inc	Raleigh
Strickland Insurance Group, Inc.	Goldsboro	UNC Health Care System	Chapel Hill
Structural Steel Products, Corp.	Clayton	Underwriters Laboratories Inc.	Research Triangle Park
Sumitomo Electric Lightwave Corp	Research Triangle Park	Unilever HPC NA	Raeford
Sun River Service Corporation	North Wilkesboro	United States Cold Storage, Inc.	Lumberton
Syracuse Plastics of NC, Inc.	Cary	United States Power Squadrons	Raleigh
Tavve Software Company	Morrisville	United Tool & Stamping Co. of NC, Inc.	Fayetteville
TCOM, LP	Elizabeth City	University of North Carolina at Chapel Hill	Chapel Hill
Teague, Campbell, Dennis & Gorham, LLP	Raleigh	Varian, Inc.	Cary
TEAMM Pharmaceuticals, Inc.	Morrisville	Victaulic Co. of America	Leland
Tecan US, Inc.	Durham	Vietri	Hillsborough
Technimark, Inc.	Fayetteville	Vishay Micro-Measurements	Raleigh
Teleflex Medal	Research Triangle Park	WakeMed	Raleigh
Telerent Leasing Corporation	Raleigh	Wall Lenk Corporation	Kinston
Textile/Clothing Technology Corp	Cary	Waste Industries USA	Raleigh
The American Board of Anesthesiology	Raleigh	Waukesha Electric Systems	Goldsboro
The American Kennel Club	Raleigh	Wayne County Partnership for Children	Goldsboro
The East Group, P.A.	Greenville	Wayne Memorial Hospital	Goldsboro
The North Carolina Medical Board	Raleigh	Weir Valves & Controls, USA, Inc.	Washington
The Planning Group, Inc.	Wilson	William Barnet & Son	Kinston
The Priess Company	Raleigh	WilMed Healthcare	Wilson
The Redwoods Group	Morrisville	Wilmington Machinery Incorporated	Wilmington
The Western Medical Group	Mamers	Wilson Economic Development Council	Wilson
Thermik Corp.	New Bern	Wyatt Quarles Seed Company	Garner
Time Warner Cable	Morrisville	YMCA of the Triangle, Inc.	Apex
Tipper Tie, Inc.	Apex	Ziptronix, Inc.	Morrisville
Torpedo Specialty Wire, Inc	Rocky Mount		
Triangle Brick Co.	Durham		
Triangle Heart Associates, P.A.	Durham		
Triangle Orthopaedic Associates, P.A.	Durham		

