



**CSRA Economic Development District
Comprehensive Economic Development Strategy
FY2023 -FY2028**

**Prepared by:
CSRA Regional Commission**

**For:
Economic Development Administration**

RESOLUTION

ADOPTION OF THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS) FOR CENTRAL SAVANNAH RIVER AREA

WHEREAS, the CSRA Regional Commission and its member counties worked to develop a Comprehensive Economic Development Strategy (CEDS) for the Central Savannah River Area of Georgia which includes the following Counties: Burke, Columbia, Glascock, Hancock, Jefferson, Jenkins, Lincoln, McDuffie, Richmond, Taliaferro, Warren, Washington and Wilkes; and

WHEREAS, the CEDS recommends that economic development efforts focus on strengthening the Region’s economy through strengthening cyber resources, workforce development, innovation and entrepreneurship, economic place-making, infrastructure improvements, and enhanced public-private and interagency cooperation; identifies key cluster industries believed to have the best potential for economic growth, expansion, and attraction in the CSRA; and includes an action plan and proposed economic development projects in the Region; and

WHEREAS, in addition to setting forth a strategy for economic growth in the Region, the CEDS is intended to meet the requirements of the U.S. Department of Commerce - Economic Development Administration (EDA) for such work, thereby buttressing efforts to secure Federal funding for projects in the seven-county Region that have a particular focus and impact on economic development, particularly projects that will benefit economically distressed areas; and

WHEREAS, following adoption of the CEDS by Board of Directors of the CSRA Regional Council, the CSRARC requests continued designation of the Region as an Economic Development District by the U.S. Department of Commerce - Economic Development Administration; and



WHEREAS, the Board of Directors of CSRA Regional Commission has recommended that the Board adopt the CEDS.

NOW, THEREFORE, BE IT RESOLVED:

That the CSRA Regional Commission supports the regional economic development strategy set forth in the CEDS and hereby adopts the Comprehensive Economic Development Strategy for the Central Savannah River Area of Georgia for 2023-2027.

Furthermore, the Board authorized the CSRA Regional Commission to serve as the federally designated Economic Development District as recognized by the Economic Development Administration.

Adopted this 5th day of December, 2022

<small>DocuSigned by:</small>  <small>C42579472AB54FE...</small> John Graham, Chairman	12/6/2022 9:26:25 AM EST
<small>DocuSigned by:</small>  <small>2DCD3D536877476...</small> Andy Crosson, Executive Director	Date 12/6/2022 9:12:29 AM EST

This report was prepared by the Central Savannah River Area Regional Commission (CSRA RC) with financial support from the U.S. Economic Development Administration (EDA), Department of Commerce. The contents reflect the views of the CSRA RC and do not necessarily reflect the views of the U.S. Economic Development Administration.

This report was prepared consistent with the *EDA Comprehensive Economic Development Strategies Summary Requirements (2015)* https://www.eda.gov/pdf/CEDS_Flyer_Whit_Background.pdf, *EDA Comprehensive Economic Development Strategy Guidelines (2015)*, <https://www.eda.gov/files/ceds/CEDS-Content-Guidelines-full.pdf>, and the *Public Works and Economic Development Act of 1965 (as amended by comprehensive amendments made by the reauthorization act, 2004)*, <http://www.eda.gov/PDF/200508PWEDAasAmended.Final.pdf>

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Vision Statement

The CSRA will sustain a strong and diversified economy, with economic prosperity extending to all parts of the region. Job creation and retention will be the core focus, driven by the region's intellectual capital, infrastructure development, workforce, and economic development organizations. The region will capitalize on its existing resources to grow its economic base, and ensure its residents have access to quality jobs and wages.

CEDS STRATEGY COMMITTEE

Angela Pringle

Richmond County Board of Education

Gia Hunter

Textron

Dave Brendza

ADP

Michael Lewis

Jefferson County Board of Education

Zack Daffin

Employment Express Pros

Dixie Morris

Georgia Vocational Rehabilitation

Jonathan Davis

Augusta Metro Chamber of Commerce

Angela Mosely

Augusta Technical College

Kathy Dorsey

Coastal Processing

Lynthia Ross

Doctor's Hospital

James Dubose

IBEW

Charlene Sizemore

Workforce Capital

Kim Elle

Augusta Warrior Project

Lisa Stich

Motion MetalWorks

Nick Fiorre

AFL/CIO

Ed Sturken

Painter's Union

Matthew Forshee

Georgia Power

Ed Tarver

Enoch & Tarver

Ella Freeman

Ft. Gordon Soldier for Life

Barrett Wimberly

GE Solutions

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CSRA COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

1.0 INTRODUCTION

The CSRA Comprehensive Economic Development Strategy (CEDS) represents the Central Savannah River Area’s (CSRA) economic development plan. The CEDS analyzes local conditions, identifies problems and opportunities, defines the vision and goals of the community, designs the strategies to accomplish these goals, and coordinates activities to implement these strategies. A successful CEDS process results in a program that creates higher-wage jobs, raises income levels, and grows and diversifies the economy. The process includes a logical approach to long-range development while identifying and implementing short-term problem solutions to achieve early results.

The CEDS document will be readily accessible to economic development stakeholders in the region. There will be a continuing program of communication and outreach that encourages broad-based public engagement, participation, and commitment of partners. The general public, government decision makers, and area businesses will use it as a guide to understand the regional economy and to take actions to improve it.

The CEDS contains four main elements: analysis, vision, action plan, and evaluation. The analysis will assess the state of the regional economy, the opportunities and threats posed by external trends and forces, and the availability of partners and resources for economic development. The CSRA’s vision and goals, together with an appraisal of the region’s competitive advantage, will set the strategic direction for the action plan. The action plan establishes program priorities for implementation. Finally, the CEDS establishes criteria and performance measures to evaluate the process and for periodic updates to the document.

1.1 IMPORTANCE OF ECONOMIC DEVELOPMENT PLANNING

A healthy economy plays a central role in maintaining vitality and quality of life within the CSRA. It provides employment opportunities to residents through the creation of jobs and business opportunities, and creates a municipal tax base that provides schools, community facilities, services, and other amenities.

At one time, economic planning was principally the responsibility of the private sector, including banks, railroads, and business organizations. It was associated with distressed or underdeveloped areas in the nation. In more recent years, economic development planning has

become a critical function of local government and specialized agencies such as development authorities and chambers of commerce.

Economic development is rooted in evolving economic policy. The national recession of the 1980s caused many local leaders to reexamine their historical economic development policies. The accompanying financial stress significantly increased competition among states and communities to attract jobs. This was combined with several significant transformations in the structure of the nation's economy, from the production of goods to the delivery of services, from a national to a global system of trade, and from labor-intensive to technology-intensive manufacturing.

Throughout the CSRA, there are many communities with small economic bases, and these communities are extremely vulnerable to economic fluctuations and non-economic influences. The loss of jobs and income in these areas' export sectors inevitably spreads to local retail businesses and financial institutions through multiplier effects. Individual communities have little control over the events that trigger their economic distress, and rarely have the means to mitigate the severity of the economic losses sustained by their residents.

1.2 WHY IS A CEDS NEEDED?

Beyond the need for comprehensive economic development planning noted above, a CEDS is required to qualify for Economic Development Administration (EDA) assistance under its public works, economic adjustment, and most planning programs, and is a prerequisite for designation by EDA as an economic development district (EDD):

- Public works and economic adjustment grants. Among other eligibility requirements for assistance under the public works or economic adjustment programs, applicants must submit the application with a CEDS acceptable to EDA. The proposed project should be consistent with the CEDS.
- EDD designation. As a prerequisite for designation, a proposed EDD must prepare a CEDS that is approved by EDA, as well as meet all other requirements for designation.
- Planning organizations. To receive EDA ongoing planning grants, EDDs must develop and maintain a CEDS process. The initial CEDS document, subsequent annual reports and revised CEDS, must be submitted for review and approval by the appropriate EDA regional office.

1.3 CEDS REQUIREMENTS

The CEDS must be the result of a continuing economic development planning process, developed with broad-based and diverse community participation, and contain the following:

- An analysis of economic and community development problems and opportunities including incorporation of any relevant material or suggestions from other government sponsored or supported plans;
- Background and history of the economic development situation of the area covered, with a discussion of the economy, including as appropriate, geography, population, labor force, resources, and the environment;
- A discussion of community participation in the planning efforts;
- A section setting forth goals and objectives for taking advantage of the opportunities and solving the economic development problems of the area serviced;
- A plan of action, including suggested projects to implement objectives and goals set forth in the strategy; and
- Performance measures that will be used to evaluate whether and to what extent goals and objectives have been or are being met.

1.4 CEDS ANNUAL REPORT

An annual report is required following the CEDS' completion. The annual report documents the progress achieved on economic development activities and reports on changing economic conditions. The annual report is used to keep track of the CEDS and its implementation, and includes the following four components:

- Adjust the CEDS as needed. Adjustments to the strategy may be necessary during the course of the year to take advantage of unforeseen opportunities or address unexpected problems. These adjustments should be consistent with the overall strategy and must be documented in the next annual report. Any changes in the structure or composition of the Strategy Committee or staff should also be described in the annual report.
- Report on the previous year's economic development activities and any significant changes in the region's economic conditions. A report of economic development activities undertaken in the previous year is related to the needs identified in the strategy. Doing so will assist EDA and other federal agencies in reporting the benefits resulting from the use of federal funds.
- Evaluate effectiveness in meeting goals. The report contains an evaluation that measures effectiveness in meeting the goals of the strategy. Performance measures are

identified to evaluate the progress of activities. EDA funded planning grantees conduct annual evaluations of the performance of the CEDS process and include the results in the annual report submitted to EDA.

- Schedule achievable goals for the coming year. A program of activities is set out in a format similar to the action plan contained in the CEDS document. The details in the schedule of activities are as definitive as possible and set the baseline for reporting performance in the next annual report. The program of activities is also, as appropriate, incorporated into the work program of EDA funded planning grants.

1.5 HOW TO USE THIS PLAN

The CEDS Plan is intended to serve as a reference point for potential users. A number of companion planning documents should be used in conjunction with the CEDS. These include:

- CSRA Regional Plan
- Augusta Area Diversification Initiative
- County Comprehensive Plans
- Special Economic Development Plans & Studies

1.6 METHODOLOGY

The CEDS is an action document. The aim is to assess various aspects of the regional economy and propose specific economic development implementation strategies. Various data sets were compiled to measure the current and future economies. The report provides an assessment of the major economic, business, and demographic trends likely to influence the future performance of the CSRA's economy.

The CEDS is divided into four sections:

- Part I: Summary Background: A summary background of the economic conditions of the region.
- Part II: SWOT Analysis: An in-depth analysis of regional strengths, weaknesses, opportunities and threats.
- Part III: Strategic Direction/Action Plan: The strategic direction and action plan should build on findings from the SWPT analysis and incorporate/integrate elements from other regionals plans (e.g., land use and transportation, workforce development, etc.) where appropriate as determined by the EDD or community/regional engagement in development of the CEDS. The action plan should also identify the stakeholder(s)

responsible for implementation, timetables, and opportunities for the integrated use of other local, state, and federal funds.

- Part IV: Evaluation Framework: Performance measures used to evaluate the organization's implementation of the CEDS and impact on the regional economy.

1.7 COMMUNITY AND PRIVATE SECTOR PARTICIPATION

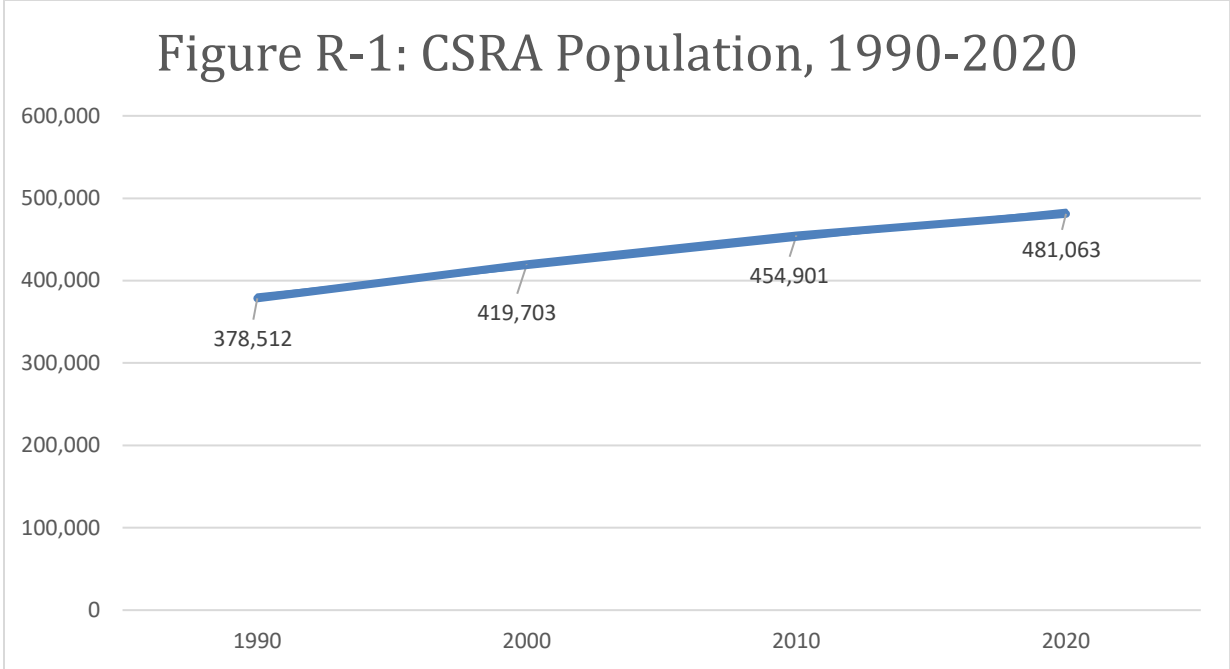
Goals and action strategies were developed through the CSRA RC's working relationship with public and private entities who are interested in the region's economic future. Specifically, a working committee, comprised of both private and public sector members, collaborated to create the CEDS Plan. A list of committee members is located following the Vision Plan page of the CEDS Plan.

2.0 REGIONAL OVERVIEW

The CSRA has seen steady growth in the past decade, but that growth was mostly confined to the metropolitan counties of Richmond and Columbia. Rural areas continue to experience a slow decline in population as more residents move to larger cities, where the majority of jobs are located. The CSRA is attractive to business and industries because of the low cost of living, availability of a trained and educated workforce and access to major cities and ports.

2.1 POPULATION

The population is 481,063. Since 2000, the region has enjoyed steady population growth, increasing by 16.6% since 2000. (Figure R-1). Anchored by the Augusta-Richmond County core area, new residents have been attracted by jobs and affordable housing costs.



Source: U.S. Census

Population growth has not been evenly distributed throughout the region. As of the 2020 estimate, seven of thirteen CSRA counties have lost population since 2020. Taliaferro County has had the highest rate of population decline (-23.2%), followed closely by Warren County (-17%) and Hancock County (-15.6%) (Table R-1). The region’s highest growth rate occurred in Columbia County, with its population increased by 72.8%% rate since 2000. Richmond County, the most populous county in the CSRA, has kept adding to its population, albeit at a slower rate than the regional average. Overall, the region’s population growth rate (16.6%) lags the state average (77.3%)

Table R-1: CSRA Population, 2000-2020

Source: 2020-ACS 5-Year Estimate

County	2000	2010	2020	Change 2000-2020	% Change 2000-2020
Burke	22,443	23,316	22,567	324	1.5%
Columbia	89,288	124,053	154,257	64,969	72.8%
Glascocock	2,556	3,082	2,984	428	16.7%
Hancock	10,076	9,429	8,500	-1,576	-15.6%
Jefferson	17,266	16,390	15,489	-1,777	-10.3%
Jenkins	8,575	8,340	8,787	212	2.5%
Lincoln	8,348	7,996	7,929	-419	-5.0%
McDuffie	21,231	21,875	21,404	173	0.8%
Richmond	199,775	200,549	202,178	2,403	1.2%
Taliaferro	2,077	1,717	1,696	-481	-23.2%
Warren	6,336	5,834	5,259	-1,077	17.0%
Washington	21,176	21,187	20,316	-860	-4.1%
Wilkes	10,687	10,593	9,797	-890	-8.3%
CSRA	419,634	454,901	481,063	61,429	16.6%

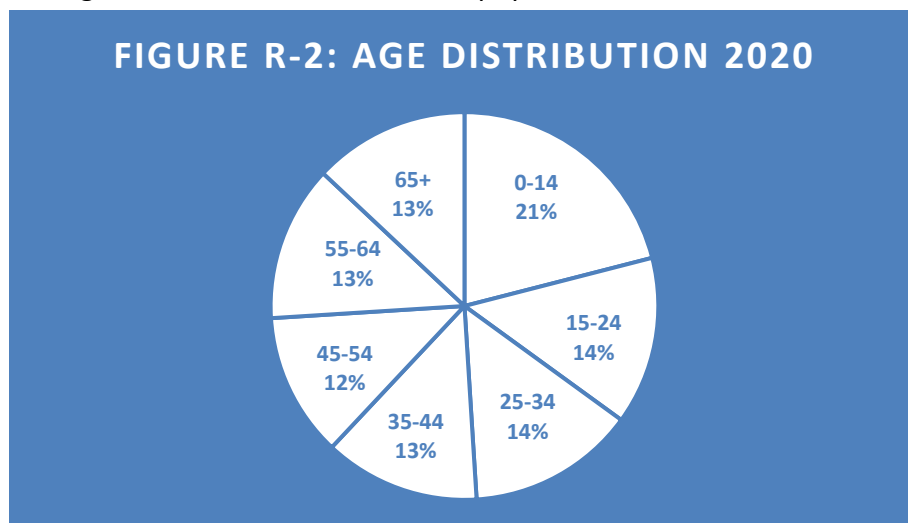
The CSRA has enjoyed steady population growth since 1980. Anchored by the Augusta metropolitan area (Augusta-Richmond and Columbia counties), new residents have been attracted by initially in the manufacturing sector but recently in the growing services sector – and the low cost of living. Through Georgia’s Office of Planning and Budget, it is projected, that the region’s population should increase to 550,673 by 2040 (Figure R-2). This population growth will primarily occur in Columbia County, where nearly 68,000 new residents are expected to move. Richmond County will see smaller growth at 5.3%. The remaining 11 counties are expected to see declines in their population.

Table R-2: CSRA Population Projections, 2020-2040

County	2020	2030	2040	Change 2020-2040	% Change 2020-2040
Burke	22,567	22,196	21,550	-1,017	-4.5%
Columbia	154,257	192,137	221,833	67,576	43.8%
Glascock	2,984	2,834	2,709	-275	-9.2%
Hancock	8,500	7,872	7,111	-1,389	-16.3%
Jefferson	15,489	14,932	14,138	-1,351	-8.7%
Jenkins	8,787	8,764	8,407	-380	-4.3%
Lincoln	7,929	7,411	6,682	-1,247	-15.7%
McDuffie	21,404	21,306	20,838	-566	-2.6%
Richmond	202,178	210,347	212,899	10,721	5.3%
Taliaferro	1,596	1,399	1,239	-357	-22.4%
Warren	5,259	4,951	4,587	-672	-12.8%
Washington	20,316	20,263	19,652	-664	-3.3%
Wilkes	9,797	9,340	9,028	-769	-7.8%
CSRA	481,063	523,779	550,673	69,610	14.5%

Source: Governor’s Office of Planning and Budget

The CSRA contains a diverse age distribution and has changed little since 1990 (Figure R-2). The CSRA is bucking state and national trends where the proportion of residents aged 65 years or older is rising much faster than the overall population.



Source: US Census Bureau

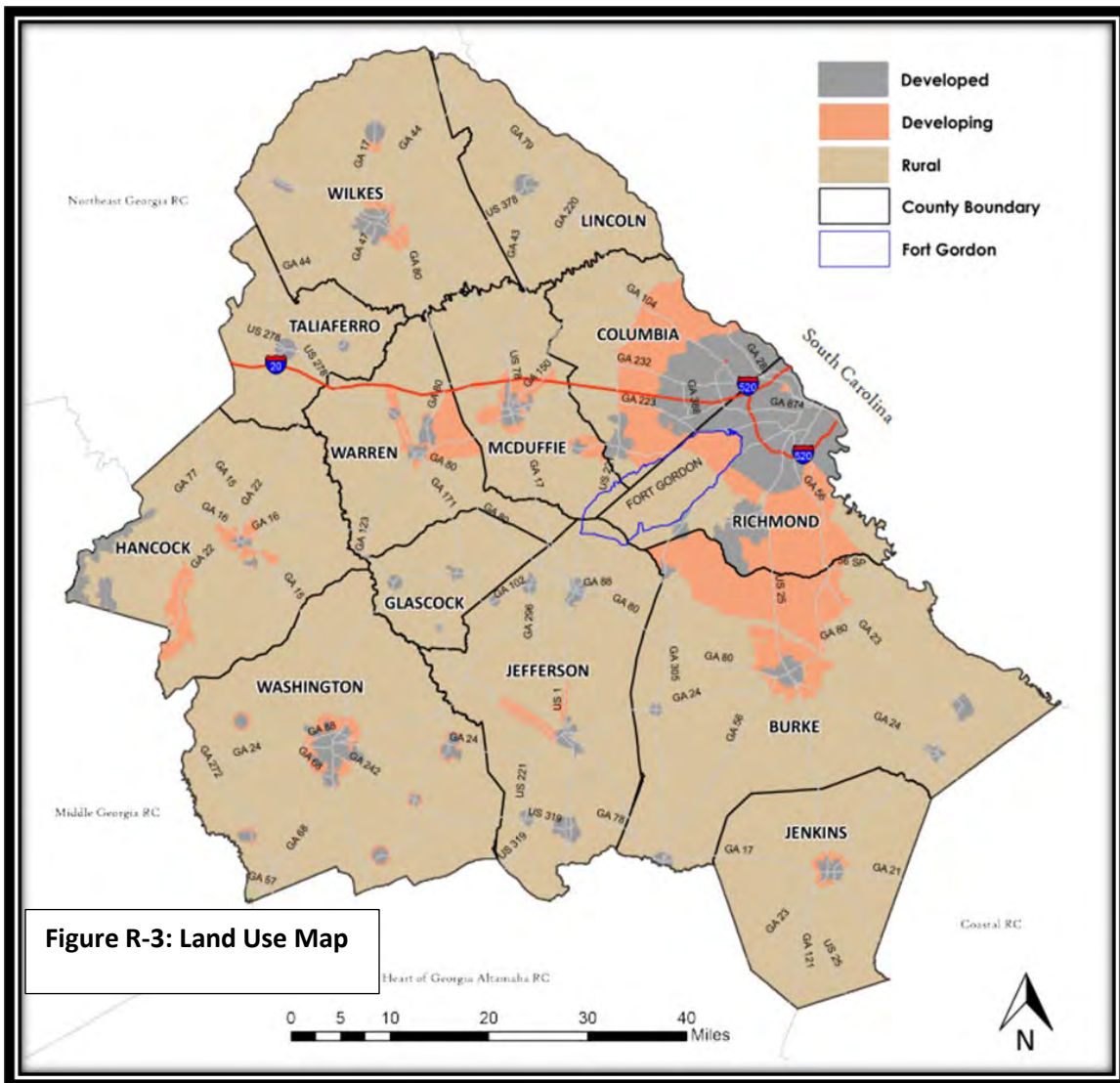
Household incomes range from \$25,712 in Jenkins County to \$82,251 in Columbia County. Every county in the CSRA, except for Columbia County has household income levels below the state average (\$61,244). Hancock, Jenksins, and Richmond counties have poverty rates over 25%.

Table R-3: CSRA Household Income and Poverty Rates, 2020			
County	Median HH Income	Per Capita Income	% in Poverty
Burke	\$45,699	\$24,050	20.0%
Columbia	\$82,251	\$35,349	6.7%
Glascock	\$46,500	\$24,258	15.5%
Hancock	\$32,914	\$17,802	30.7%
Jefferson	\$37,009	\$21,178	21.1%
Jenkins	\$25,712	\$14,212	28.0%
Lincoln	\$42,036	\$34,074	16.5%
McDuffie	\$47,327	\$23,355	16.7%
Richmond	\$43,882	\$23,842	25.5%
Taliaferro	\$37,717	\$20,979	23.2%
Warren	\$38,250	\$24,547	23.4%
Washington	\$36,402	\$20,535	21.3%
Wilkes	\$36,486	\$23,265	20.2%
Georgia	\$61,224	\$32,427	14.0%

Source: U.S. Bureau of the Census; Calculations by CSRARC

2.2 LAND USE

From the early fur trading post along the Savannah River, in 1735, to the growing cotton and kaolin industry and the expanding medical and science research center, of today, changes in population and economic development have led to changing land use patterns in the CSRA. The Savannah River Site, the Fort Gordon Military Reservation, and the opening of the I-20 transportation corridor have led to growth in developed and developing land uses, particularly in the Augusta metropolitan area. A vast majority of the CSRA is largely rural (Figure R-3)



The primarily rural land uses of the CSRA are also evident when examining the region’s population density. Statewide, there are 185.6 people per square mile. Only Columbia and Richmond Counties among the thirteen jurisdictions of the CSRA exceed the state rate. The region-wide average is 95.7 people per square mile, significantly below the state average (Table R-4)

Table R-4 Population Density			
County	2022 Population	Land Area (sq. mi)	Population Density
Burke	22,567	827	29.7
Columbia	154,257	290	537.6
Glascok	2,984	144	20.1
Hancock	8,500	471	18.5
Jefferson	15,489	527	29.8
Jenkins	8,787	347	25.0
Lincoln	7,929	210	36.6
McDuffie	21,404	257	84.0
Richmond	202,178	324	637
Taliaferro	1,596	195	8
Warren	5,259	284	18.3
Washington	20,316	679	29.5
Wilkes	9,797	470	20.4
CSRA	481,063	5,025	95.7

Source: U.S. Bureau QuickFacts 2022

2.3 ENVIRONMENTAL

Natural and environmental resources provide social, economic, cultural, and environmental benefits. Economic benefits include the use of natural resources, such as kaolin, in the manufacturing process of consumer goods. This means jobs for local residents. Social, environmental and cultural benefits include a valuable quality of life by providing scenic landscapes and opportunities for outdoor recreation and enjoyment.

REGIONALLY IMPORTANT RESOURCES

A Regionally Important Resource (RIR) is a natural or historic resource that is of sufficient size or importance to warrant special consideration by the local governments having jurisdiction over that resource. The Georgia Planning Act of 1989 (the same law that requires comprehensive planning by local governments) authorizes the Department of Community Affairs (DCA) to identify RIRs statewide and to coordinate the preparation of a regional resource plan for each RIR. Once designated as an RIR, activities sponsored by a local government (such as issuing a permit, building a public facility, etc.) that may have an impact on the resource will be subject to intergovernmental review for consistency with the plan for that RIR.

The Augusta Canal was authorized as a National Heritage Area on November 12, 1996. The first level of the Canal (from the head gates in Columbia County to 13th Street near downtown Augusta) is approximately 8.5 miles. The second and third levels add approximately 3 miles but are not navigable. The corridor follows the full length of the best preserved canal of its kind remaining in the southern United States. The canal transformed Augusta into an important regional industrial area on the eve of the Civil War, and was instrumental in the post-Civil War relocation of much of the nation's textile industry to the south. The Augusta Canal is considered to be a Regionally Important Resource and was designated as such in 1996.

Over the past 10 years, Augusta Canal Authority has supported several major administrative milestones and capital improvements totaling nearly \$34 million dollars in public and private investments:

- Designating the Augusta Canal as a National Heritage Park: Accomplished 1996
- Creating a Multi-use park of regional and statewide importance: Improvements began in 1999 and continue to the present
- Developing the canal corridor as an accessible educational resource: \$3.3 million Canal Interpretive Center opened 2003. Tour boats launched 2003 and 2004
- Facilitating Economic Development at edge of Downtown: \$17 million Enterprise Mill revitalization 1998. Third Level Canal reclamation began 2003.

LAND AREA AND SOILS

The CSRA Region is comprised of three major land area types, the Southern Piedmont-Mountain Province, the Carolina & Georgia Sandhills and the Southern Coastal Plain. Through a variety of natural processes each of these areas have differing mineral composition, structure, texture, drainage, and fertility and construction constraints. General characteristics of the land resources in the CSRA Region are as follows:

The Southern Piedmont is characterized by steep to gently rolling thin, well drained red soils with sandy loam surface layers over sandy clay to clay sub-soils. Much of the original topsoil has been eroded by past agricultural abuses, leaving red clay sub-soils exposed in some areas. Soybeans and forages are grown in remaining topsoil. Small grains and pastures are better adapted where topsoil is gone. Suitability for building foundations is fair to good; septic tank suitability is fair to poor.

The Carolina and Georgia Sand Hills, consists of a belt of gently sloping to steep, well drained and sandy soils originally derived from marine sands, loams, and clays deposited on the crystalline and metamorphic bedrock of adjacent uplands. Soils in this region are generally infertile and dry. The land area is largely covered with sparse forest of scrub oak and pines. This area offers poor to good suitability for residences and industry. The sand hills comprise a rather narrow strip less than 10 miles wide with very irregular boundaries.

Southern Coastal Plain is characterized by gently sloping, well-drained sandy loam to sandy soils over friable sandy clay loam to clay sub-soils that are sticky when wet. When fertilized and limed soils produce high yields of corn, peanuts, tobacco, small grains and soybeans. This province provides a fair to good suitability for residential and industrial foundations.

TIMBER RESOURCES

Timber is a very important resource in the CSRA, whose 2,898,849- timber land acres account for 12% of Georgia's total timberland acreage. Timber is the most extensive natural resource in the CSRA with 67.7% of all CSRA land acres classified as timberland. All CSRA forest has the potential for timber industry usage.

AQUIFER RECHARGE AREAS

Water resources vary within the CSRA because of the differing soil types and aquifers within the region. The Coastal Plain is underlain by five major aquifers, including the Principal artisan aquifer, which may be the world's largest, covering a third of Georgia, most of Florida and parts

of Alabama and South Carolina. There are three major aquifers underlying the CSRA region, the Crystalline Rock aquifer in the North above the fall line; the Cretaceous aquifer system in the Center of the region; and the Floridian aquifer system in the southern CSRA. The Cretaceous Aquifer is a system of sand and gravel. The Floridian aquifer is made of confined limestone, dolostone and calcareous sand. It supplies approximately 50% of the states groundwater.

RIVER BASINS AND MAJOR LAKES

Georgia's surface hydrology is unique in that no major rivers flow into Georgia from outside its borders. Rather, runoff from the state's northern mountains and upper Piedmont forms the headwaters of most of the 2,000 miles of streams and rivers flowing through the state. The main rivers in the CSRA region include the Savannah, the Little, the Ogeechee and the Ohoopsee Rivers with a combined shoreline of 1,140 miles.

The northern CSRA, which falls in the Southern Piedmont landform has two hydropower projects, notably the Clarks Hill Dam and Reservoir with a surface area of 78,500 acres. The Clarks Hill Dam creates a great multipurpose storage reservoir for flood control and hydroelectric power and in conjunction with the Sevens Creek Dam below it has almost complete control over the flow to provide a relatively uniform flow for navigation in the Coastal Plain below Augusta. Practically all of the flow from the area above Clarks Hill Dam is used for hydroelectric power. Other downstream uses include navigation, irrigation and industry. The northern border of the Georgia/Carolina Sand Hills region is commonly the head of navigation for large rivers and the site of waterpower dams. The flow of larger streams is relatively uniform with high yields due to groundwater inflow. Larger streams are sluggish, flowing in deep meandering low banked, tree choked channels. River water is used for steam power plants and some manufacturing, but artisan wells supply most towns and many industries in this region. The cretaceous aquifer underlying the Fall Line for a distance of 30-60 miles, consists mostly of sand and gravel.

2.4 OPPORTUNITY ZONES

More than 8,700 opportunity zones have been designated across the United States. These zones were created by the Federal 2017 Tax Cuts and Jobs Act and designated to foster long term private sector investments in low-income communities.

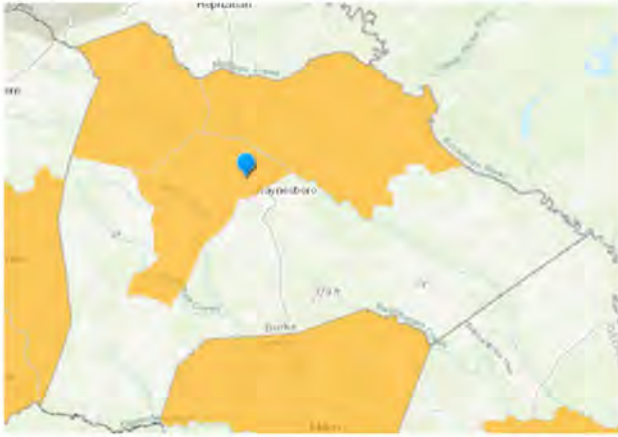
Local government in Georgia which undertake redevelopment and revitalizations efforts in qualified census tracts can qualify for a tax credit of \$3,500 per job. Georgia Department of Community Affairs will consider designations for areas within or adjacent to a census block with 15% or greater poverty where an enterprise zone of urban redevelopment plan exists.

The following incentives are offered to investors for putting their capital to work in these qualified opportunity zones:

1. Temporary, capital gain tax deferral:
 - The period of capital gain tax deferral ends upon 12/31/2026 or an earlier sale
2. A step-up basis
 - Investment held for five years- Basis increased by 10% of deferred gain (90% taxed)
 - Investment held for seven years- Basis increased by another 5% of deferred gain (85% taxed)
3. Forgiveness
 - Investment held for 10 years- Basis equal to fair market value; forgiveness of gains on appreciation of investment of sale or exchange of Opportunity Fund Investment. This exclusion only applies to gains accrued after an investment in an Opportunity Fund.

There are 27 census tracts in the CSRA that are designated as qualified opportunity zones. These zones are located in Burke, Hancock, Jefferson, Jenkins, Lincoln, McDuffie, Richmond, Taliaferro, Warren, and Washington counties. There is a large cluster of opportunity zones in Richmond County as well as many rural areas. These tracts offer residential, commercial, and industrial development and redevelopment opportunities. Figures R-4 through R-13 show economic data for the opportunity zones in the CSRA.

Figure R-4:
Burke County
 Federal Opportunity Zones



Quick Facts

Census Tract 9501

- Population: 3,113
- Unemployment Rate: 4.4%
- Median Household Income: \$45,600
- Poverty Rate: 19.0%

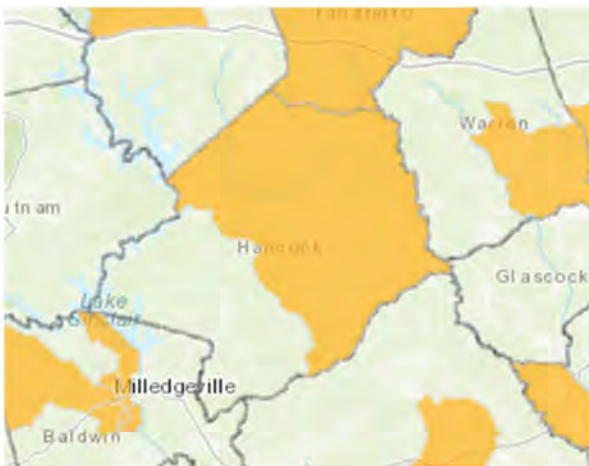
Census Tract 9502

- Population: 2,964
- Unemployment Rate: 4.4%
- Median Household Income: \$45,699
- Poverty Rate: 19.0%

Census Tract 9504

- Population: 4,477
- Unemployment Rate: 4.4%
- Median Household Income: \$45,699
- Poverty Rate: 19.0%

Figure R-5:
Hancock County
 Federal Opportunity Zones

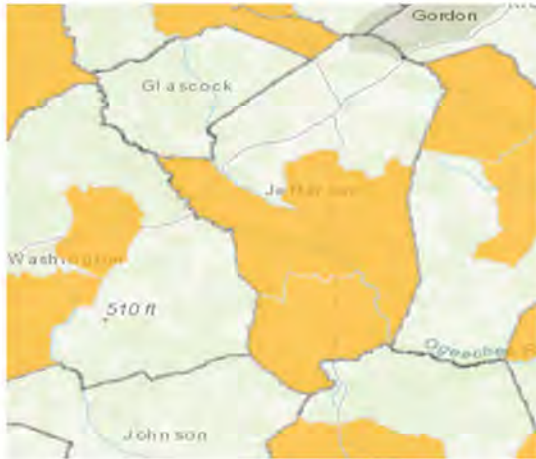


Quick Facts

Census Tract 4804

- Population: 6,443
- Unemployment Rate: 2.5%
- Median Household Income: \$32,194
- Poverty Rate: 24.6%

Figure R-6:
Jefferson County
 Federal Opportunity Zones



Quick Facts

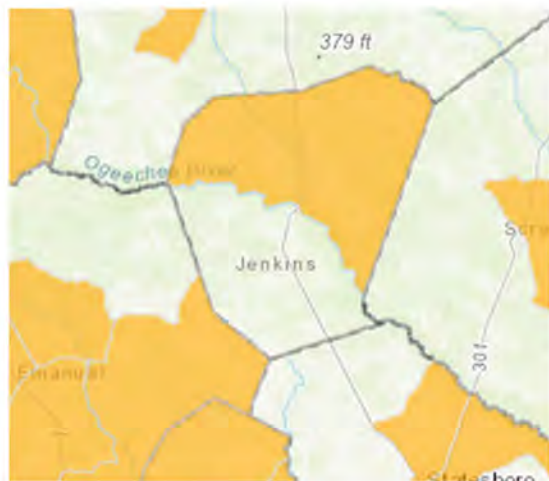
Census Tract 9603

- Population: 5,492
- Unemployment Rate: 6.7%
- Median Household Income: \$37,009
- Poverty Rate: 21.1%

Census Tract 9604

- Population: 3,159
- Unemployment Rate: 6.7%
- Median Household Income: \$37,009
- Poverty Rate: 21.1%

Figure R-7:
Jenkins County
 Federal Opportunity Zones



Quick Facts

Census Tract 9601

- Population: 6,030
- Unemployment Rate: 3.9%
- Median Household Income: \$25,712
- Poverty Rate: 34.5%

Figure R-8:
Lincoln County
 Federal Opportunity Zones

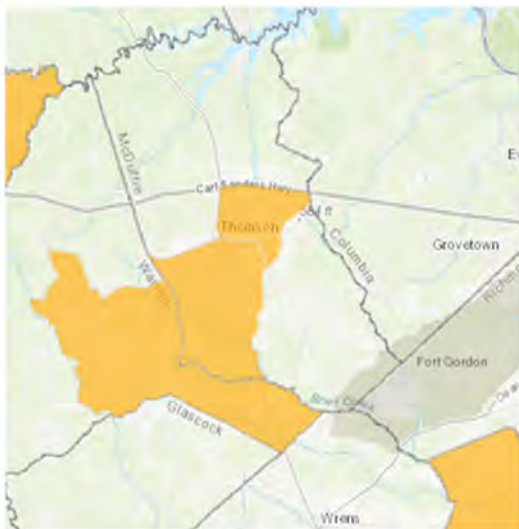


Quick Facts

Census Tract 9701

- Population: 3,257
- Unemployment Rate: 4.0%
- Median Household Income: \$42,036
- Poverty Rate: 20.1%

Figure R-9:
McDuffie County
 Federal Opportunity Zones



Quick Facts

Census Tract 9502

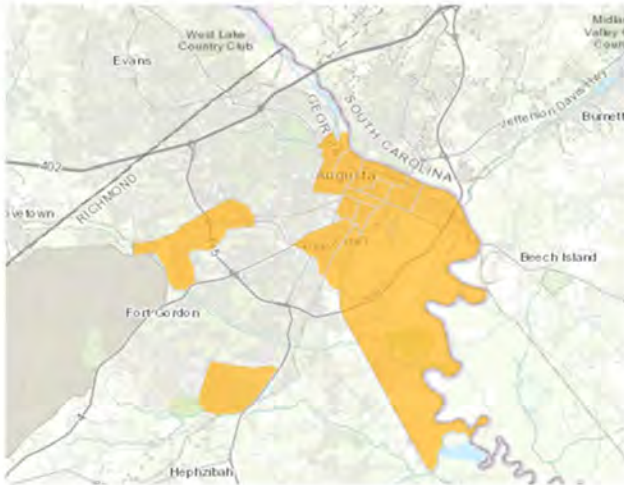
- Population: 5,408
- Unemployment Rate: 6.3%
- Median Household Income: \$47,327
- Poverty Rate: 20.7%

Census Tract 9504

- Population: 3,141
- Unemployment Rate: 6.3%
- Median Household Income: \$47,327
- Poverty Rate: 20.7%

Figure R-10:
Richmond County
 Federal Opportunity Zones

QUICK FACTS



Census Tract 2

- Population: 2,718
- Poverty Rate: 34.8%

Census Tract 3

- Population: 1,021
- Poverty Rate: 49.0%

Census Tract 6

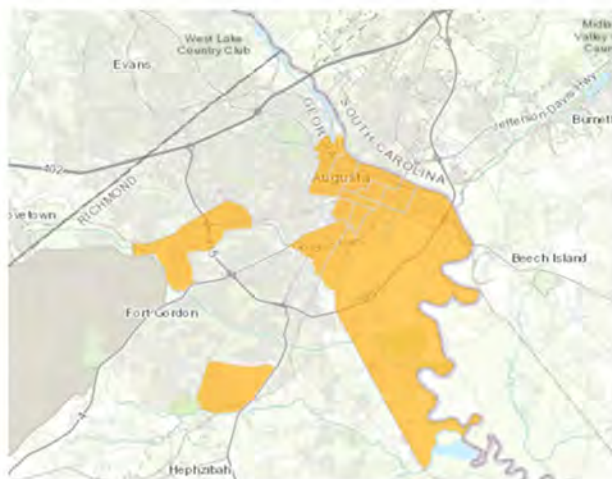
- Population: 2,590
- Poverty Rate: 35.4%

Census Tract 7

- Population: 1,132
- Poverty Rate: 43.6%

Figure R-10:
Richmond County
 Federal Opportunity Zones

Quick Facts



Census Tract 9

- Population: 1,290
- Poverty Rate: 43.3%

Census Tract 10

- Population: 2,171
- Poverty Rate: 15.0%

Census Tract 14

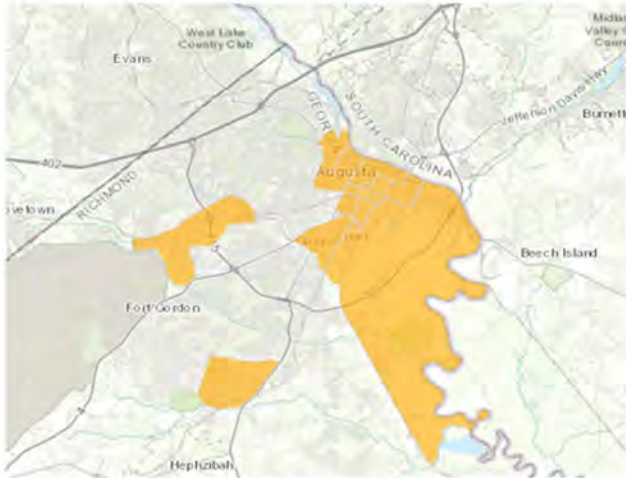
- Population: 2,847
- Poverty Rate: 62.0%

Census Tract 15

- Population: 1,283
- Poverty Rate: 33.1%

Figure R-10:
Richmond County

Federal Opportunity Zones



Quick Facts

Census Tract 104

- Population: 3,196
- Poverty Rate: 65.2%

Census Tract 105

- Population: 6,384
- Poverty Rate: 39.4%

Census Tract 106

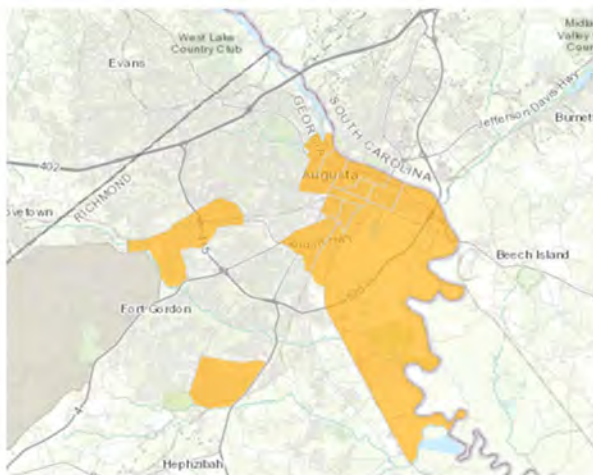
- Population: 2,495
- Poverty Rate: 27.8%

Census Tract 107

- Population: 5,595
- Poverty Rate: 27.6%

Figure R-10:
Richmond County

Federal Opportunity Zones

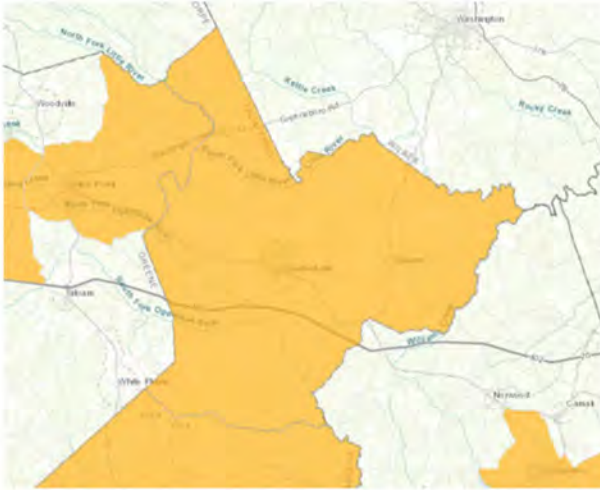


Quick Facts

Census Tract 110

- Population: 1,154
- Poverty Rate: 43.8%

Figure R-11:
Taliaferro County
 Federal Opportunity Zones

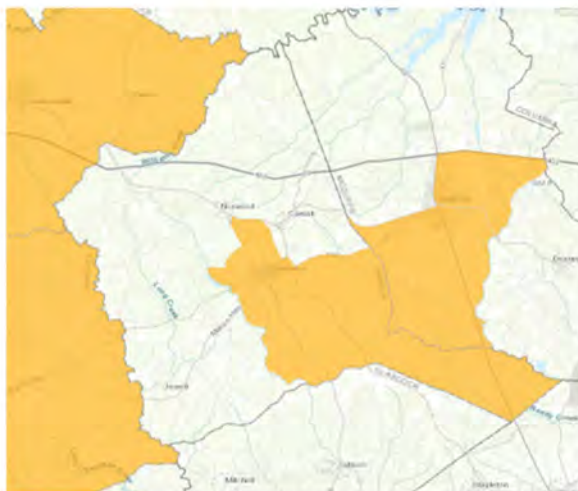


Quick Facts

Census Tract 102

- Population: 1,596
- Unemployment Rate: 4.2%
- Median Household Income: \$37,717
- Poverty Rate: 24.7%

Figure R-12:
Warren County
 Federal Opportunity Zones



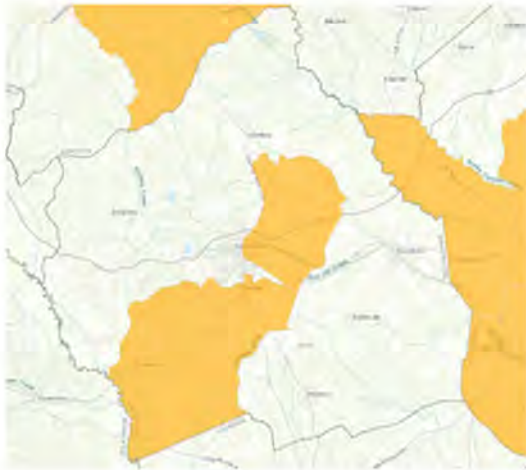
Quick Facts

Census Tract 9704

- Population: 2,729
- Unemployment Rate: 3.7%
- Median Household Income: \$37,717
- Poverty Rate: 25.7%

Figure R-13:
Washington County

Federal Opportunity Zones



Quick Facts

Census Tract 9504

- Population: 4,062
- Unemployment Rate: 5.1%
- Median Household Income: \$36,402
- Poverty Rate: 18.8%

Census Tract 9507

- Population: 3,575
- Unemployment Rate: 5.1%
- Median Household Income: \$36,402
- Poverty Rate: 25.2%

INTRODUCTION

The CSRA region includes a diverse economy that spans thirteen urban and rural counties. The region contains economic clusters that range from highly concentrated medical industries at the core of the Augusta area to an industrial/manufacturing beltway that extends throughout the rural counties of Central Georgia.

The last three decades were a period of sustained economic growth throughout the CSRA. Economic and employment growth emerged from the addition of new service-providing firms and expansion of existing industries. While the region's competitive strengths and location of new industries have supported the growth in the urban area, rural areas have seen a gradual decline. The COVID-19 pandemic and resulting economic fallout caused a significant hardship for workers and businesses. The economy across the CSRA has almost completely returned, however, a severe worker shortage threatens to halt business and industry expansion in the region.

The data presented in this section captures the changing trends of the CSRA economy. Primary data includes the U.S. Bureau of Economic Analysis, the U.S. Department of Labor, and the Georgia Department of Labor. Due to the different methods used by these agencies in counting employment data, some discrepancies in employment totals may occur.

3.1 OCCUPATIONAL PROFILE

The occupational profile of the CSRA reflects the work performed by the region's residents, whether they work in the CSRA or another region.

Table E-1 presents the Super Sector Industries in the CSRA. The workforce is well diversified with the Government sector employing 36,420 people followed by the Trade, Transportation, and Utilities sector with 36,194 employees. The Education and Health and Professional Business Services industrial are also large employers in the CSRA with both sectors having more than 20,000 workers. Over the past year, the Construction sector has seen the largest decline with a loss of 1,200 jobs.

Table E1: Super Sector Industries CSRA 2021-2022			
Industry	2021 Employment	2022 Employment	% change
Construction	13,617	12,339	-9.4%
Education and Health Services	27,766	27,957	0.7%
Financial Activities	4,872	5,147	5.6%
Information	1,652	1,534	-7.1%
Leisure and Hospitality	18,479	19,089	3.3%
Manufacturing	16,066	16,159	0.6%
Natural Resources, Mining, and Ag.	1,980	1,928	-2.6%
Other Services	4,442	4,329	-2.5%
Professional and Business Services	20,361	20,808	2.2%
Trade, Transportation, and Utilities	28,207	32,194	14.1%
Unclassified	241	505	109.5%
Government	37,331	36,420	-2.4%
Total	175,014	178,408	4.2%

Source: Georgia Department of Labor

3.2 SECTOR AND INDUSTRY TRENDS

There are 10,728 businesses in the region, employing 178,302. people. The majority of businesses employ ten or fewer people. The small business sector of the economy is supplemented by major employers such as manufacturers, education institutions, and government agencies.

Figure E-1 displays the CSRA's industry mix in 2020. The majority of jobs in the region are in service-producing industries, which has been the fastest growing sector since 2020. The Goods Producing and Government saw declines in employment. These data highlight the shift from manufacturing to service industries that has occurred in the past twenty years.

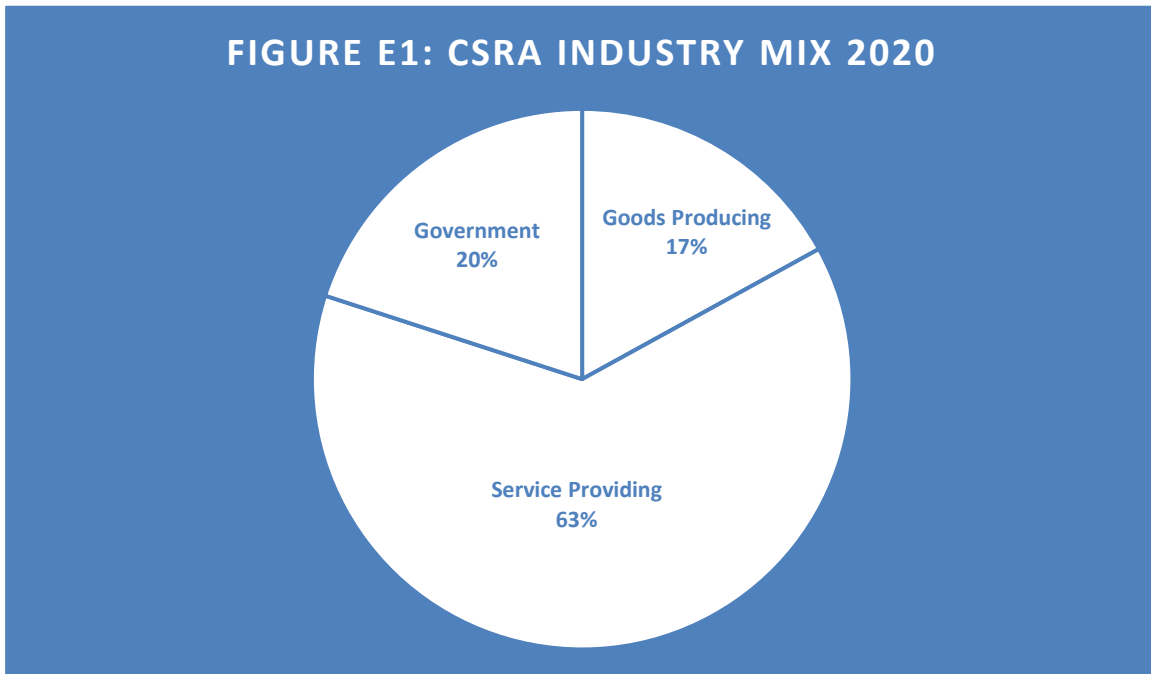


Table E2 shows the number of firms and the number of employed in each sector in the 1st quarter of 2022.

Table E2: Industry Mix- 1 st Quarter of 2022			
Industry	Number of Firms	Number Employed	Percent
Goods-Producing	1,455	30,280	17%
Service Providing	8,000	111,124	62.3%
Unclassified	723	478	0.3%
Total Private Sector	10,178	141,883	79.6%
Total Government	550	36,420	20.4
All Industries	10,728	178,302	100.00%

Source: Georgia Department of Labor

Table E-3 presents a detailed breakdown of the employment in the Goods Producing Sector. Overall, this sector saw job decline of nearly 7% since 2009. The agriculture, forestry, fishing, and hunting field was hit the hardest, dropping nearly 60%. Mining also saw a sharp decline where nearly one-quarter of the jobs were lost . Construction and Manufacturing saw modest declines during the same time period.

Table E3: Goods Producing			
Industry Mix	2009 Employment	2022 Employment	% change
Agriculture, Forestry, Fishing, and Hunting	2,694	1,116	-58.6%
Mining	1,075	812	-24.5%
Construction	12,606	12,191	-3.3%
Manufacturing	16,322	16,162	-1.0%
Total	32,697	30,281	-7.4%

Table E-4 shows a breakdown of the Service Providing Sector. This sector is the largest

employer in the CSRA, employing 111,127 people. Health Care is the largest employer in this sector with over 26,000 employees. Retail Trade, Accommodation and Food Services, and Retail Trade are also large employers in the region.

Table E4: Service Providing			
Industry Mix	Number of Firms	Employment	% Employment
Utilities	24	2,135	1.2%
Wholesale Trade	373	4,254	2.4%
Retail Trade	1,554	21,369	12.0%
Transportation and Warehousing	272	4,447	2.5%
Information	101	1,534	2.5%
Finance and Insurance	461	2,975	1.7%
Real Estate and Rental and Leasing	387	2,178	1.2%
Professional	942	7,493	4.2%
Management	38	845	0.5%
Administrative and Waste Mgt.	642	12,474	7.0%
Educational Services	118	1,902	1.1%
Health Care and Social Assistance	1,254	26,053	14.6%
Arts & Entertainment	118	2,130	1.2%
Accommodation and Food Services	979	17,008	9.5%
Other Services	747	4,329	2.4%
Total	8,000	111,127	62.3%

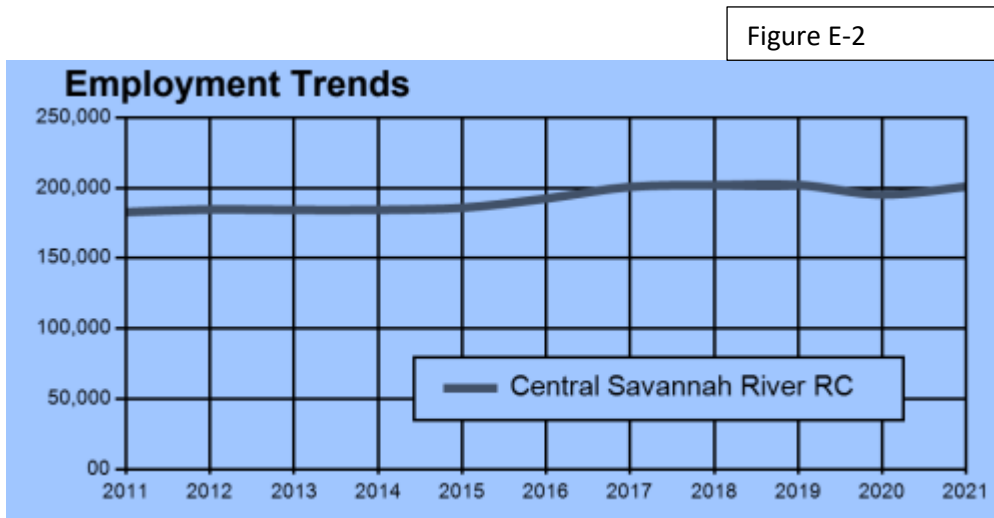
Source: Georgia Department of Labor

Government is also a large employer in the CSRA, employing nearly 36,500 people. This is nearly 20% of all employment in the CSTA. Table E 5 shows the breakdown between federal, state, and local government. There are 277 local government in the CSRA, employing 277 people.

Table E5: Government			
Industry Mix	Number of Firms	2022 Employment	Percent
Federal Government	114	8,537	4.8%
State Government	159	9,106	5.1%
Local Government	277	18,777	10.5%
Total	550	36,420	20.4%

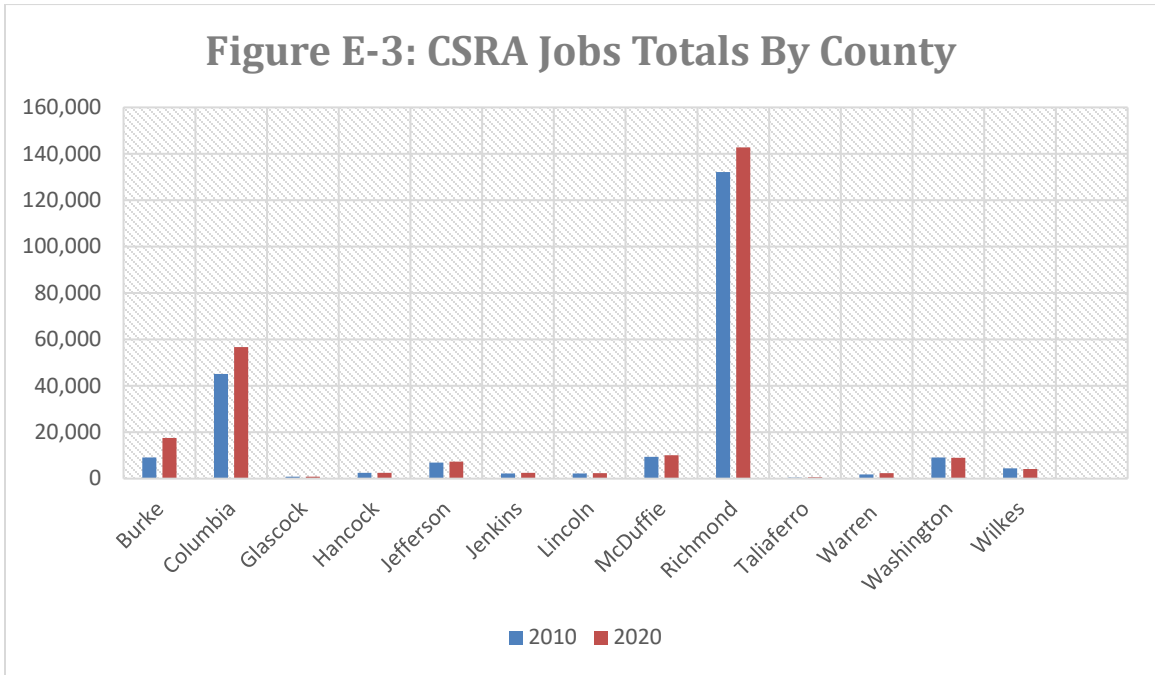
Source: Georgia Department of Labor

Employment Between 2011 and 2021, the number of jobs in the CSRA slowly increased (Figure E-2). Major shifts have occurred both in the total number of jobs within sectors and their relative value to the economic base. Sectors such as Manufacturing, Farm, and Retail Trade have declined in both total and proportional terms while Services, and Finance, Insurance & Real Estate have increased since 2011. Some sectors, such as Government & Government Enterprises, have remained stable in employment levels.



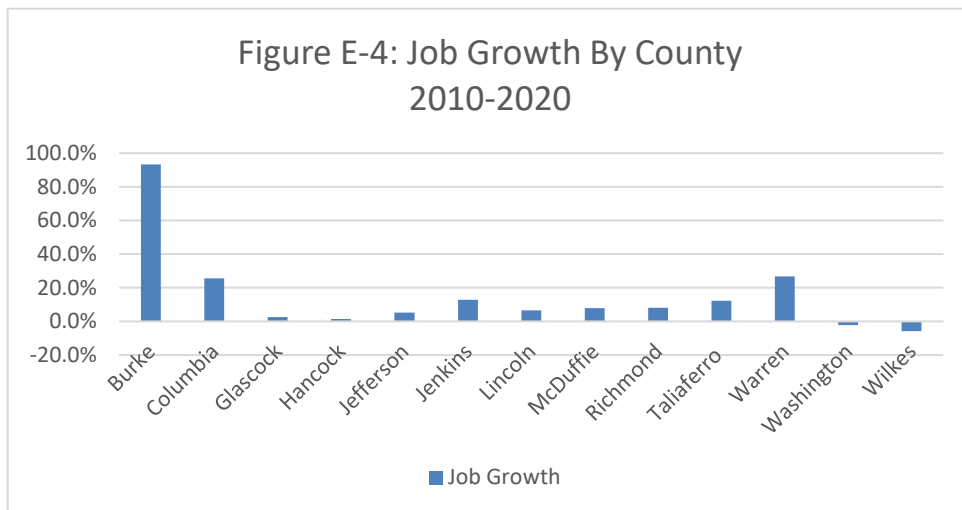
Source: Georgia Department of Labor

Figure E-3 displays total jobs by county. The majority of the CSRA’s jobs are in the urbanized area (Augusta-Richmond County and Columbia County). Together, these two counties account for over 78% of jobs within the region (Figure E-2).



Source: US Bureau of Economic Analysis

Examining job growth rates by county between 2010 and 2020, Burke County saw the greatest job growth of any county in the CSRA. This growth was centered around Plant Vogtle’s expansion. Columbia County and Warren counties significant job growth over the past decade as well. Washington and Wilkes counties are the only two counties in the region that saw negative job growth.



Major employer loses are reported to the Georgia Department of Labor (GDOL) for listing in the Business Layoff & Closure listing directory. It is important to note that these represent only major employers which are required to report closures by federal labor law requirements. It does not include employers that are not required to report, or jobs impacted by major employer closures, such as suppliers.

Table E-6 provides the number of job losses by large employers in 2018

Table E6: Major Employer Losses in the CSRA 2018			
Company	County	Estimated Impact	Date
Textron	Richmond	60	1/23/2018
Georgia Pacific	Richmond	55	4/30/2018
Hollander Sleep Products	McDuffie	13	8/17/2018
Solo Cup Operation Corp.	Richmond	12	12/31/2018
Total in 2018		140	

Table E- 7 provides the number of job losses by large employers in 2019

Table E7: Major Employer Losses in the CSRA 2019			
Company	County	Estimated Impact	Date
Beasley Forest Products	Washington	21	1/18/2019
Cerner Corporation	Richmond	129	3/31/2019
OMNIPLEX World Services	Fort Gordon	151	4/30/2019
Overgaard, Inc	Columbia	2	6/1/2019
Georgia Pacific	McDuffie	95	8/4/2019
Hollander Sleep Products	McDuffie	175	8/16/2019
Golden & Golden	Burke	1	8/25/2019
Total in 2019		574	

Table E-8 provides the number of job losses by large employers in 2020

Table E8: Major Employer Losses in the CSRA 2020			
Company	County	Estimated Impact	Date
Ryder System	Richmond	50	1/13/2020
Resolute Forest Products	Richmond	150	1/13/2020
Terri Woodward, Inc.	Columbia	14	3/23/2020
Beasley Media Group	Richmond	25	4/1/2020
The Family Y of the CSRA	Multiple Counties	394	3/25/2020
The Finish Line, Inc	Richmond	26	4/12/2020
Aqua Salon and Spa	Columbia	8	3/28/2020
Augusta Sportswear Brands	Columbia	141	3/23/2020
Tower 3 Champions Retreat	Columbia	45	3/26/2020
Trophy & Gift Center	Richmond	1	4/27/2020
Vision Works	Richmond	4	4/4/2020
Bloomin Brands	Richmond	245	3/15/2020
Master Tech	Richmond	2	4/4/2020
DMAC81, LLC	Richmond	23	3/23/2020
Richmond County Construction	Burke	1,302	6/29/2020
Avid Budget Group	Richmond	5	8/28/2020
P.F. Chang's China Bistro	Richmond	75	9/18/2020
Total in 2020		2,510	

Many of the job losses in 2020 we caused by the COVID 19 pandemic, and the mandatory shutdown of restaurants and other businesses associated with the service industry. The service industry has seen a rebound but is having a difficult time finding workers.

Table E-9 provides the number of job losses by large employers in 2020

Table E9: Major Employer Losses in the CSRA 2021			
Company	County	Estimated Impact	Date
BAE Systems	Fort Gordon	65	6/30/82021
Total in 2021		65	

Source: GDOL Business Layoff & Closure Listing
http://www.dol.state.ga.us/em/layoff_closure_listing.htm

3.3 SUBSECTORS

MANUFACTURING

The manufacturing sector in the CSRA is characterized by diverse production sectors. Collectively, manufacturers encompass 350 businesses employing over 16,000 people. Transportation Equipment (3,158) account for the highest share employers, followed by Food (1,338) and furniture Fabricated Metal Products (Table E-10).

Table E-10: Distribution of CSRA Manufacturing Employers, 2022		
	Number	%
Apparel	289	0.2
Beverage & Tobacco	145	0.1
Chemical	773	0.4

Electrical Equipment & Appliances	459	0.3
Fabricated Metal Products	1,338	0.8
Food	2,765	1.6
Furniture & Related	194	0.1
Machinery	913	0.5
Miscellaneous	549	0.3
Nonmetallic Mineral Products	1,213	0.7
Paper	913	0.5
Plastic & Rubber Products	663	0.4
Primary Metal	182	0.1
Printing & Related	91	0.1
Textile Product Mills	316	0.2
Transportation Equipment	3,158	1.8
Wood Products	1,548	0.9
Total	16,162	9.1
Source: Georgia Department of Labor Local Area Profiles (2022); Calculations by CSRA RC		

Consistent with trends in the state and national economies, CSRA counties made a gradual structural shift away from their traditional manufacturing and industrial base toward a more service-based economy during the past two decades. Region-wide, the number of

manufacturing jobs continues to decline in the CSRA.

The decline of manufacturing jobs is a growing national issue, affecting all U.S. regions. There are a number of causes to this decline:

The Recession of 2001: Much of the decline in manufacturing employment since 2000 reflects the recession that began in 2001 and the relatively weak recovery in demand that followed. The recession drastically reduced demand for goods in both the United States and the rest of the world. Those cyclical losses in the sector have persisted ever since.

Manufacturing Productivity: Over recent decades, U.S. manufacturers have continually invested in better capital goods and manufacturing techniques in order to remain competitive. There has been a significant increase in manufacturing productivity due to technology, capital investment, and entrepreneurialism. Those changes have enabled manufacturers to raise their output and keep pace with overall economic growth without a corresponding increase in the number of workers that they employ.

Changing Consumption Patterns: The share of consumer spending devoted to manufactured goods has declined over time both in the United States and in other industrialized nations, even though demand for manufactured goods has increased in absolute terms. As consumers' income has risen, they have increased their purchases of goods but boosted their spending on services even more.

Competition from Foreign Producers: A portion of the long-term decline in employment in some manufacturing industries can be linked to the expansion of trade. The U.S. trade problems in manufacturing are caused by longer-run shifts in comparative advantage that favor lower-cost overseas production. The gains from trade arise as nations specialize in the goods and services that they can produce efficiently relative to other countries. Thus, the expansion of trade necessarily involves changes in the mix of products. The United States has specialized in products requiring a highly skilled labor force even as lesser jobs have shifted to countries where labor is less skilled. In the apparel sector, for example, the number of jobs in the United States has declined from over 900,000 in 1990 to less than 300,000 today.

Changes in the Structure of Manufacturing: Finally, manufacturing employers increasingly have met short-term fluctuations in demand not by adding permanent staff but by hiring temporary workers through agencies and by contracting with outside firms to provide certain non-core support functions - for example, cafeteria, janitorial, and payroll-processing services - which

traditionally had been performed in-house and therefore had been counted as manufacturing jobs.

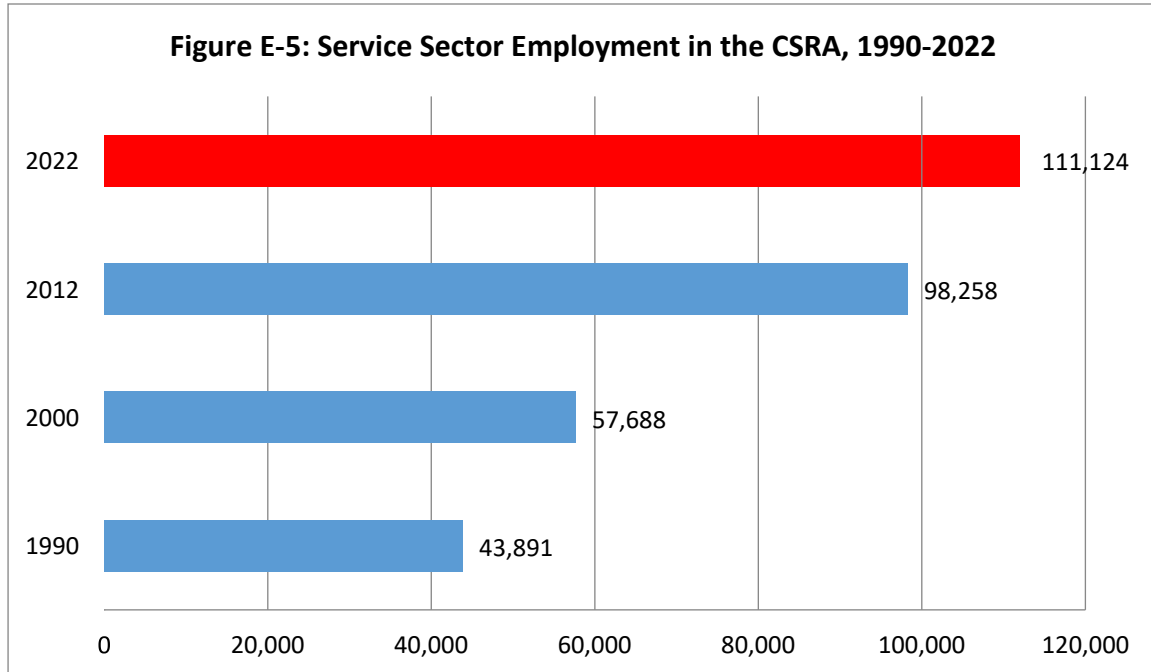
COVID-19 Pandemic: Thousands of people were laid off because of shutdowns at manufacturing plants in the CSRA. Many of those jobs have returned as vaccines were developed and the pandemic waned in the region.

SERVICE SECTOR



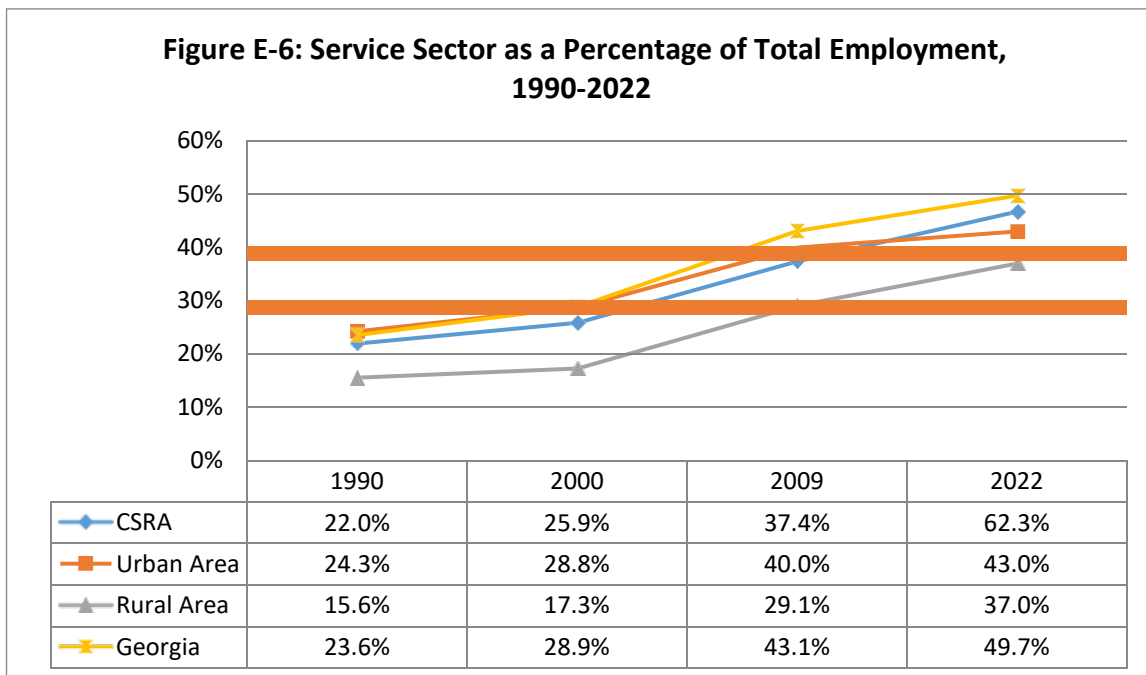
The service sector is an aggregate of several service industries ranging from Accommodation & Food services to highly Professional services. The sector's distribution also reflects an area's economic base. For example, localities with high numbers of service sector jobs in Arts & Entertainment and Accommodation & Food services tend to be tourism-oriented while areas with significant Management, Professional & Technical services tend to have stronger commercial and industrial bases.

Consistent with state and national trends, the service sector in the CSRA has been responsible for most of the job growth in the past decade. Collectively, this sector employs 111,124 people (Figure E-8), nearly double employment levels in 2000. It is the largest of all employment sectors in the CSRA.



Source: U.S. Bureau of Economic Analysis, CA 25 and 25N; Calculations by CSRA RC

The growth of the service sector is also reflected in its share of employment (Figure E-9). In 2016, the sector accounted for 46.7% of total employment, compared to 22% in 1990.



Source: U.S. Bureau of Economic Analysis, CA 25 and 25N; Calculations by CSRA RC

In 2015, there were 7,164 service sector firms in the CSRA, and that number has grown to nearly 8,000 in 2022. (Table E-4). The sector is primarily driven by the Health Care and Social Assistance with 26,053 jobs(14.6%) Retail Trade with 21,369 jobs (12%) and Accommodation & Food Services nearly 17,000 jobs (10.0%). The Table E-11 shows the growth of the service sub sector since 2015. Real Estate and Rental Leasing is the fastest growing at 44% while Information Services saw the largest decline at nearly 30%.

Table E11: CSRA Service Sub Sector Change 2015-2022			
Industry Mix	Employment 2015	Employment 2022	% Change in Employment
Utilities	2,031	2,135	-5.1%
Wholesale Trade	4,092	4,254	4.0%
Retail Trade	19,126	21,369	11.7%
Transportation and Warehousing	3,180	4,447	39.8%
Information	2,158	1,534	-28.9%
Finance and Insurance	3,651	2,975	-18.5%
Real Estate and Rental and Leasing	1,513	2,178	43.9%
Professional	5,911	7,493	26.8%
Management	1,112	845	-24.0%
Administrative and Waste Mgt.	10,487	12,474	18.9%
Educational Services	1,474	1,902	29.0%
Health Care and Social Assistance	22,920	26,053	13.7%
Arts & Entertainment	1,784	2,130	19.4%
Accommodation and Food Services	14,941	17,008	14.4%
Other Services	3,877	4,329	11.7%
Total	98,258	111,127	13.1%

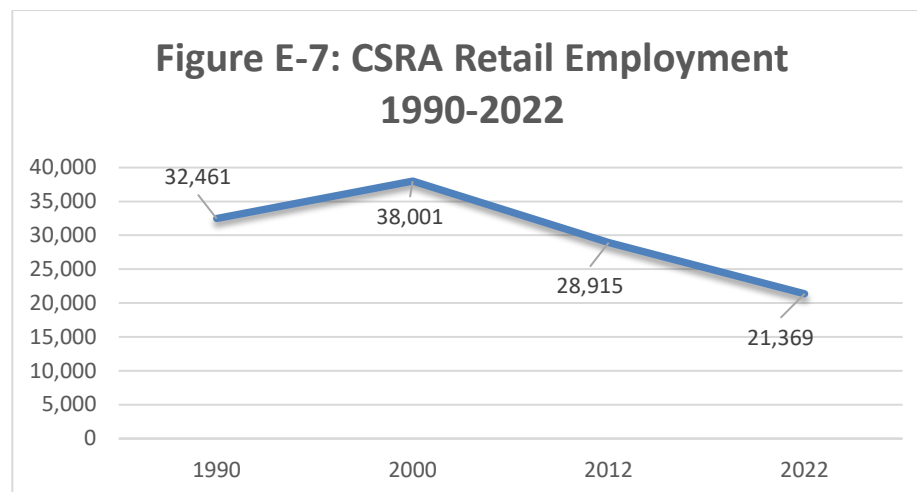
Source: Georgia Department of Labor Area Labor Profiles Adapted for Consistency with BEA data; Calculations by CSRA RC

Source: Georgia Department of Labor Area Labor Profiles (2012) Adapted for Consistency with BEA data; Calculations by CSRA RC



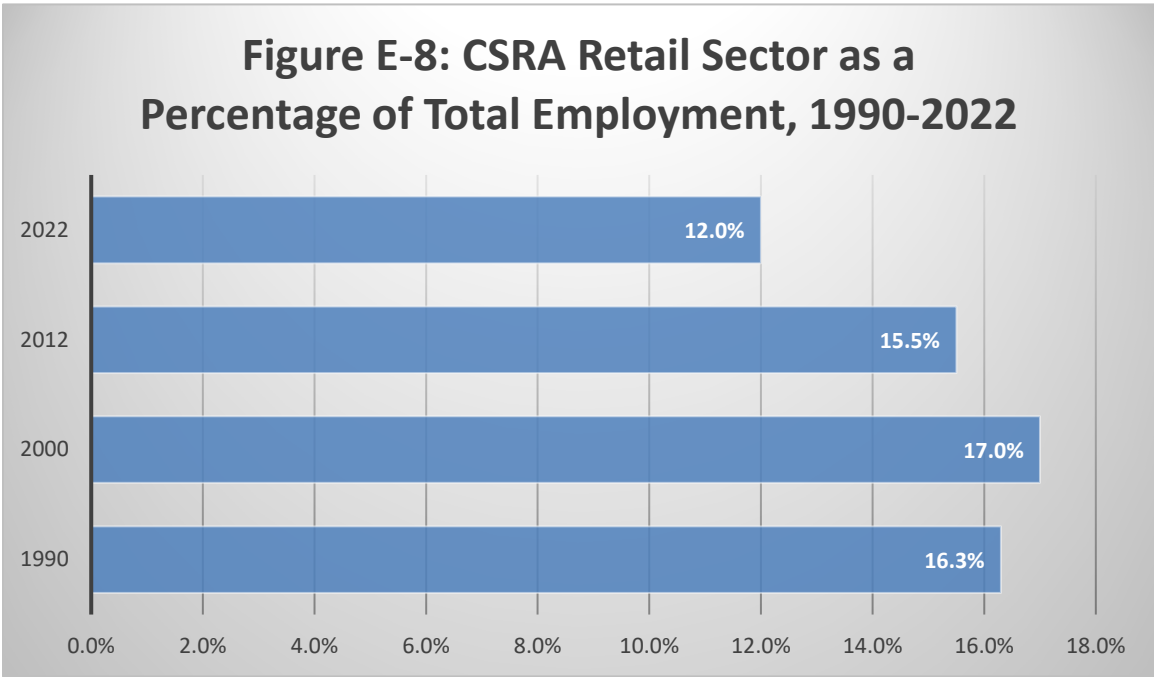
RETAIL

Retail is an important economic sector in the CSRA, with 1,544 retail establishments employing 21,289 people (Figure E-7). Since 2000, however, retail employment in the CSRA has declined by nearly 44%.



Source: U.S. Bureau of Economic Analysis, CA 25 and 25N

The sector’s employment loss is reflected in its relative value to total employment (Figure E-8). In 1990, the sector accounted for 16.3% of total employment. Retail grew slightly in 2000 (17.0) but has steadily declined since then. By 2022, the Retail Sector has dropped to 12%, nearly 4% over the past decade.



Source: Georgia Department of Labor, 202

FARM SECTOR

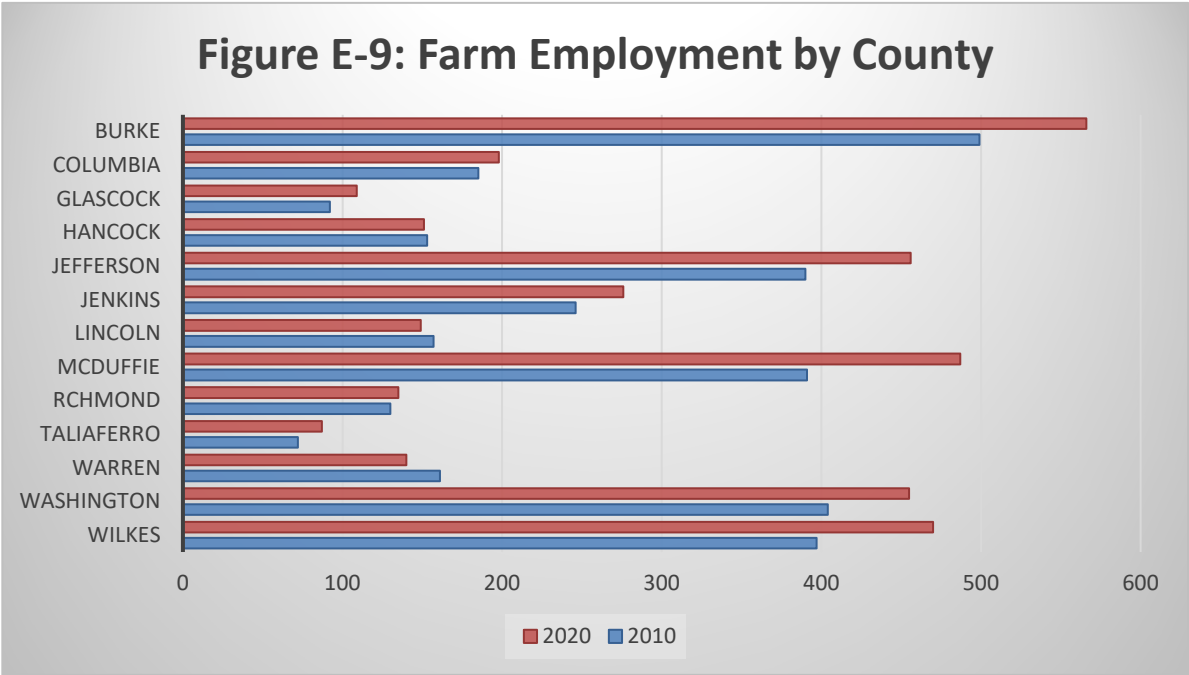
In rural CSRA counties, the Farm Sector plays an important role in employment. There are over 3,000 farms in the CSRA, accounting for over a million acres of land. Approximately one-third of all lands in the rural CSRA are occupied by farming production.

Table E-12 displays farm cash receipts for the CSRA. Over \$246,000,000 were reported in 2010. Burke, Jefferson, McDuffie and Wilkes Counties have the largest farming sectors, collectively accounting for over two-thirds of the CSRA's total farm cash receipts.

County	2010	2022
Burke	\$69,007	\$167,358
Columbia	\$6,513	\$4,574
Glascok	\$3,393	\$3,252
Hancock	\$4,416	\$8,104
Jefferson	\$39,017	\$91,742
Jenkins	\$21,477	\$41,215
Lincoln	\$1,958	\$12,273
McDuffie	\$35,232	\$50,021
Richmond	\$1,882	\$3,965
Taliaferro	\$6,202	\$20,393
Warren	\$6,404	\$6,172
Washington	\$15,103	\$31,423
Wilkes	\$36,055	\$114,672
TOTAL	\$246,659	\$555,164

Source: Georgia County Guide (2020)

The Farm sector accounts for 3,679 jobs in the CSRA (Figure E-9). Employment in the Farm sector has grown slightly in the CSRA since 2010 when 3,277 people were employed in this sector.



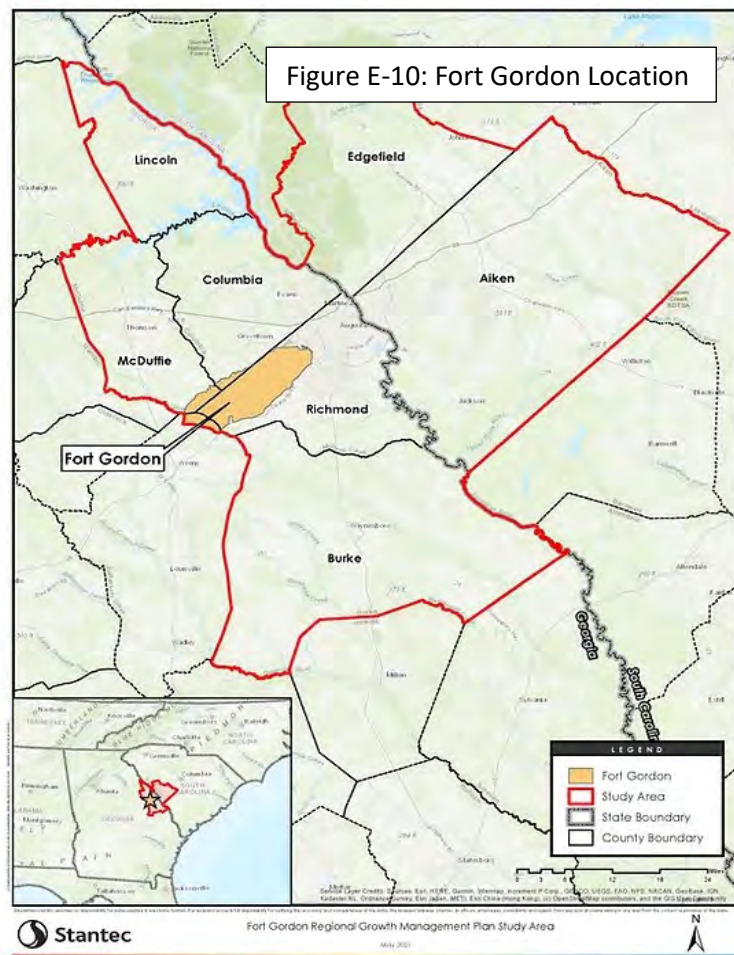
Source: U.S. Bureau of Economic Analysis, CA 25 and 25N

FORESTRY

Timber is a very important resource in the CSRA, whose 2,898,849- timber land acres account for 12% of Georgia's total timberland acreage. Timber is the most extensive natural resource in the CSRA with 67.7% of all the region's land acres classified as timberland. All of the CSRA forests have the potential for timber industry usage.

MILITARY SECTOR

The U.S military is a major employer in the CSRA, particularly in Richmond and Columbia Counties. Fort Gordon occupies approximately 56,000 acres in four counties. The majority of the installation and the entire cantonment area lie within Richmond County, with small portions of the training areas in Jefferson, Columbia, and McDuffie Counties (Figure E-10).



Source: Fort Gordon Regional Growth and Management Plan Overview

Fort Gordon is the Augusta area’s largest employer and drives the regional economy. According to the *Fort Gordon Regional Growth Management Plan Overview*, Fort Gordon accounts for over 31,000 military, civilian, and contractor jobs and 24,000 other indirect jobs, and \$ 2.4 billion in annual economic activity and tax revenue. Growth at the installation is expected to continue. According to estimates from the Department of Defense, Fort Gordon is anticipating an addition 894 military personnel by 2020, in addition to the 8,449 arriving since 2012. Further population growth will be generated from service member families, contractors, and other support staff, as well as indirect jobs, translating into thousands of new residents to the area.

The contracting needs of Fort Gordon are substantial and vital to the local economy. With an annual budget of approximately \$900 million, Fort Gordon procures a large amount of contract work from the private sector for maintenance, supplies, construction, manufacturing, equipment and materials, transportation, communications, and health & food services. Many local contractors have intentionally located in proximity to Fort Gordon to benefit from contract work

MEDICAL/HEALTHCARE

Health Care is a primary resource for the CSRA region and a major employer. Located in Richmond County, there are seven major facilities (Medical College of Georgia, University Hospital, Veteran's Administration Hospital, Dwight D. Eisenhower Hospital, Gracewood State School and Hospital, Doctor’s Hospital, and St. Joseph Hospital), that employ a large number of people. As of January 2022, there were 21,369 people employed in the Health Care and Social Service field. In addition to basic medical services, this



sector provides highly technical research, medical advice through telecommunications to isolated areas of the region, and a highly educated workforce.

FINANCE, INSURANCE & REAL ESTATE SECTOR



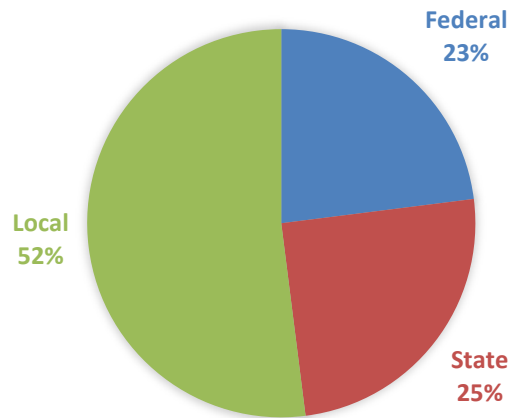
The FIRE sector has enjoyed steady growth throughout the CSRA. Encompassing service products ranging from banking to real estate, there are 484 firms, employing 5,153 people.

GOVERNMENT AND GOVERNMENT ENTERPRISES SUBSECTOR

The Government sector has long been the most stable of all employment sectors. While changes in production and services are common, government work remain relatively steady and grows in proportion to population growth. There are currently 8,537 employed with the federal government, 9,106 with state government, and 18,777 with local governments. As of January 2022, there were 36,420 people employed in government across the CSRA.



**E- 11: GOVERNMENT EMPLOYMENT,
2022**



Source: Georgia Department of Labor

3.4 REGIONALLY SIGNIFICANT INDUSTRIES

Identifying regionally significant industries is important in considering the strengths, weaknesses, opportunities and threats of the regional economy, as well as measuring potential for growth.

The analysis presented below is based on U.S. Department of Labor ‘super sectors’, an aggregate of all industries falling under broad sectors. These super sectors are used because the U.S. Bureau of Economic Analysis employment numbers contain too many “Not Disclosed” sectors, rendering the data difficult to use in this type of analysis.

SHIFT SHARE ANALYSIS

Shift-share analysis is an analytical technique that is used to compare regional growth rates over time with national growth rates by disaggregating growth into three components:

- Employment change due to national growth - i.e., the increase in employment that would be expected if an industry grew in a local area at the same rate as the national economy.
- Employment change due to the proportional shift - i.e., the change in employment that would be expected if an industry expanded or contracted at the same rate above or below the national growth rate locally as nationally.
- Growth due to the regional factors that cause a local industry to outpace or grow slower than the national industry. This value is referred to as the differential shift. The differential shift can be interpreted as the extent to which an area has a competitive advantage for that sector. A positive differential shift implies the area has a competitive advantage.

The number of jobs in the CSRA is a primary indicator of local economic health and vitality. That is why it is important for the region to understand employment conditions. The employment data presented in this analysis were obtained from a sample of the U.S. Bureau of Labor Statistics' Census of Employment and Wages

SHIFT-SHARE RESULTS FOR THE CSRA

THE INDUSTRIAL MIX COMPONENT

The industrial mix component is found by calculating the percent growth rate for an economic sector at the national level and subtracting from it the national growth component. Thus, the industrial mix component measures how well an industry has grown, net of effects from the business cycle.

Table E-13 focuses exclusively shift-share analysis of the performance of each county in the CSRA relative to employment nationwide between 2010 and 2020.

The purpose of shift-share analysis is to perform a numerical sort on the data that offers a construct for describing two key differences between the growth of employment in Burke County and the nation at large. The objective is to answer two different but interrelated questions. First, did the difference in employment growth arise because of initial dissimilarities in the industry composition of employment? Or, second, did the difference arise because of disparities in the performance of local industries in contrast with their national counterparts?

Differences between the extent and composition of local employment growth with comparison to the nation are broken down into the hypothetical components: national growth, industry mix, and regional shift. Each component attempts to account for a separate aspect of the disparity between the overall growths of employment locally vs. nationally over 2010-2020.

National Growth

This component is the most straightforward. It calibrates the growth in Burke County employment that may be attributed to overall national conditions and trends. If the industry composition and growth of employment had been the same locally as nationally, then Burke Counties employment growth over 2010-2020 would have matched the overall national rate of **10.34%**.

Industry Mix

The industry mix component seeks to address and answer the question: "Did county employment growth of **x %** outpace the overall national average (**10.34%**) because employment was more concentrated toward slower growing industries when compared to the nation?" That is, did county employment growth over 2010-2020 underperform the nation simply because its industry mix was weighted more heavily toward industries that experienced slower growth at the national level?

The results are derived by multiplying local employment in each sector for 2010 by the

difference between the national growth rate for each sector and the total national employment growth rate (**10.34%**). The industry mix results report positive values for those industries that experienced employment growth above the **10.34%** national average, while negative values are posted for those industries that grew at rates less than **10.34%**.

The most crucial result from the industry mix calculation is the "TOTAL" derived from summing over all industries. The negative value reported reveals that the industry composition employment for Burke County was tilted toward slower growing industries. Positive results would have indicated just the opposite.

Regional Shift

The third shift-share component, tagged the "Regional Shift", computes the gain (or loss) in local employment from an industry growing faster (or slower) than the same industry nationally. When employment in a local industry grows faster (or declines less) than its counterpart nationally there occurs a positive "shift" in the net "share" of national employment captured by that industry locally.

Table E-13: Shift-Share Analysis of Employment Growth, 2010-2020							
County	Actual Growth		National Growth		Industry Mix		Regional Shift
Burke	93.35%	=	10.34%	+	-.72%	+	83.73%
Columbia	25.52%	=	10.34%	+	-.78%	+	15.97%
Glascok	2.64%	=	10.34%	+	.91%	+	-6.79%
Hancock	1.56%	=	10.34%	+	.72%	+	-9.50%
Jefferson	5.34%	=	10.34%	+	-2.0%	+	-3.00%
Jenkins	12.72%	=	10.34%	+	-3.51%	+	5.59%
Lincoln	6.55%	=	10.34%	+	-2.34%	+	-1.45%
McDuffie	14.26%	=	10.34%	+	-1.93%	+	5.85%
Richmond	8.01%	=	10.34%	+	-3.03%	+	0.71%
Taliaferro	12.34%	=	10.34%	+	-1.38%	+	3.38%
Warren	26.78%	=	10.34%	+	-0.90%	+	17.35%
Washington	-2.06%	=	10.34%	+	-0.51%	+	-11.88%
Wilkes	-6.29%	=	10.34%	+	-2.70%	+	-13.93%

SHIFT-SHARE RESULTS FOR THE CSRA- COUNTY BY COUNTY

Burke County's employment growth over 2010-2020 of **93.35%** surpassed the **10.34%** growth of employment nationally by **83.01%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries outperformed their counterparts nationally.

Columbia County's employment growth over 2010-2020 of **25.52%** surpassed the **10.34%** growth of employment nationally by **15.19%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries outperformed their counterparts nationally.

Glascock County's employment growth over 2010-2020 of **2.64%** trailed the **10.34%** growth of employment nationally by **-7.70%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries underperformed their counterparts nationally.

Hancock County's employment growth over 2010-2020 of **1.56%** trailed the **10.34%** growth of employment nationally by **-8.78%**. Accounting for this difference was an industry mix inclined toward industries that experienced faster growth, coupled with the fact that a large share of local industries underperformed their counterparts nationally.

Jefferson County's employment growth over 2010-2020 of **5.34%** trailed the **10.34%** growth of employment nationally by **-5.00%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries underperformed their counterparts nationally.

Jenkins County's employment growth over 2010-2020 of **12.72%** surpassed the **10.34%** growth of employment nationally by **2.38%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries outperformed their counterparts nationally.

Lincoln County's employment growth over 2010-2020 of **6.55%** trailed the **10.34%** growth of employment nationally by **-3.79%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries underperformed their counterparts nationally.

McDuffie County's employment growth over 2010-2020 of **14.26%** surpassed the **10.34%** growth of employment nationally by **3.92%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries outperformed their counterparts nationally.

Richmond County's employment growth over 2010-2020 of **8.01%** trailed the **10.34%** growth of

employment nationally by **-2.32%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries outperformed their counterparts nationally.

Taliaferro County's employment growth over 2010-2020 of **12.34%** surpassed the **10.34%** growth of employment nationally by **2.00%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries outperformed their counterparts nationally.

Warren County's employment growth over 2010-2020 of **26.78%** surpassed the **10.34%** growth of employment nationally by **16.45%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries outperformed their counterparts nationally.

Washington County's employment change over 2010-2020 of **-2.06%** trailed the **10.34%** growth of employment nationally by **-12.40%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries underperformed their counterparts nationally.

Wilkes County's employment change over 2010-2020 of **-6.29%** trailed the **10.34%** growth of employment nationally by **-16.63%**. Accounting for this difference was an industry mix inclined toward industries that experienced slower growth, coupled with the fact that a large share of local industries underperformed their counterparts nationally.

3.5 BUSINESS CLUSTERS

The development of cluster networks facilitates the interaction and sharing of information among businesses and institutions. More cost effective solutions to common problems may be achieved, such as training programs, collective purchasing, and shared marketing. The following clusters were identified in the region:

CYBER COMMAND

Cyber growth in Augusta is expected to continue growing with a third building being planned for the Georgia Cyber Center. The first building, the Hull McKnight building opened on July 10, 2018, and houses the center's education and training components. Building two, the Shaffer McCartney building opened in January of 2019. This second building houses the center's technology incubator/accelerator space and other private companies. These two buildings consist of a combined 330-thousand square feet. The planned third building will be anchored by Augusta University's School. The CSRA continues to be a growing hub of cyber activity with nearly 2,000 jobs open in the Augusta area. The average pay for these positions are estimated to be \$76,489.

RETAIL CLUSTERS

The Main Streets of incorporated areas in all thirteen counties are home to many retail stores. These are high traffic areas that attract a significant number of shoppers.

TOURISM & HOSPITALITY CLUSTER

The cultural and historic assets of Main Streets provide attractions to support tourism. Significant investments in support of this cluster have been made in recent years, such as the enhancement of walkable areas and the restoration of many historic assets. By promoting a planned, coordinated tourism effort, the region may use its unique assets to bring dollars from visitors into its economy.

MANUFACTURING CLUSTERS

The manufacturing sector in the region encompasses a variety of industries and is concentrated along major arteries such as U.S 25 and U.S 1.

MILITARY CLUSTERS

The areas adjacent to Fort Gordon include significant contractor activity that includes small manufacturers of specialized electronic equipment.

EDUCATION & MEDICAL CLUSTERS

Education and medical clusters are located within the City of Augusta and encompass over a dozen major colleges and hospitals.

3.6 INCOME AND WAGES

Incomes rates throughout the CSRA have historically been lower than the state average. Except for Columbia County, average CSRA per capita income is 44% below the state average (Table E-14). However, income levels in four of thirteen CSRA counties have increased at a faster rate than the state average in the past two decades. All of the CSRA has seen income rates increase since 2000.

Table E-14: Per Capita Family Income for Selected Jurisdictions, 2000-2020

	2000	2010	2020	2000-2020 % Change
Burke County	\$13,136	\$15,934	\$20,050	52.6%
Columbia County	\$23,496	\$29,479	\$35,349	50.4%
Glascocock County	\$14,185	\$16,844	\$24,258	78.1%
Hancock County	\$10,916	\$10,925	\$17,082	56.5%
Jefferson County	\$13,491	\$15,165	\$21,178	60.0%
Jenkins County	\$13,400	\$17,628	\$14,212	6.1%
Lincoln County	\$15,351	\$19,627	\$24,074	56.8%
McDuffie County	\$18,005	\$17,261	\$23,355	29.7%

Richmond County	\$17,088	\$20,604	\$23,842	39.5%
Taliaferro County	\$15,498	\$13,955	\$20,979	35.4%
Warren County	\$14,022	\$15,987	\$24,547	75.1%
Washington County	\$15,565	\$15,033	\$20,535	31.9%
Wilkes County	\$11,597	\$16,933	\$23,265	101%
CSRA Average	\$15,058	\$17,337	\$22,517	49.5%
Georgia Average	\$21,154	25,134	\$32,427	53.3%

Source: U.S. Census Bureau: 2000, 2010, and 2020 ACS 5-Year Estimates

Table E-15 presents the change in average weekly wages by industry between 2010 and 2022. Like the other income and wage indicators noted above, weekly wages have increased over the past decade. The tight labor market created by the COVID-19 pandemic resulted in significant wage increase across all industries in the CSRA. Wages in the Accommodation and Food Service industry saw the largest increase, rising nearly 113% increase.

Table E-15: Weekly Wage Rates for Selected Industries, Q1 2010-2022			
	2010	2022	% Change
Agriculture, Forestry, Fishing and Hunting	\$815	\$867	6.4%
Construction	\$836	\$1,593	90.5%
Manufacturing	\$1,019	\$1,212	18.9%
Wholesale Trade	\$944	\$1,228	30.1%
Retail Trade	\$477	\$658	37.9%
Transportation & Warehousing	\$788	\$919	16.6%
Information	\$917	\$1,114	21.5%
Finance and Insurance	\$972	\$1,519	56.3%
Healthcare & Social Assistance	\$944	\$1037	9.9%
Accommodation & Food Services	\$269	\$572	112.6%
Public Administration	\$747	\$947	26.8%
All Industries	\$759	\$1014	33.6%
Source: Georgia Department of Labor – 1st Qtr. 2010-2022			

3.7 LABOR FORCE ESTIMATES

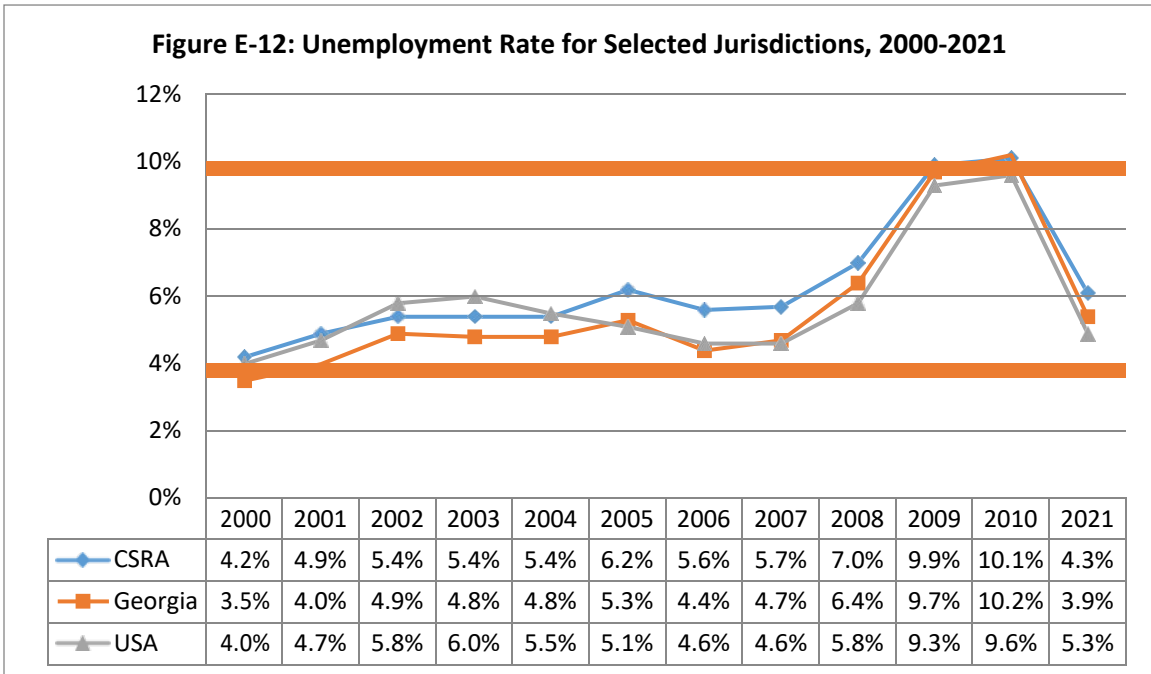
Labor force estimates are presented in Table E-16. The CSRA’s unemployment rate lies at the statewide average (4.3%). The region’s unemployment rate has traditionally been slightly above the state and national averages (Figure E-20). During the peak of the COVID-19 pandemic in 2020, many people in the CSRA were laid off or had their hours cut due to business shutdowns. As vaccines were developed and better treatments became available, business began to reopen. Many people left the workforce and never returned, and others took higher paying jobs, leaving the service industry with a severe worker shortage.



Table E-16: Labor Force Estimates, 2021

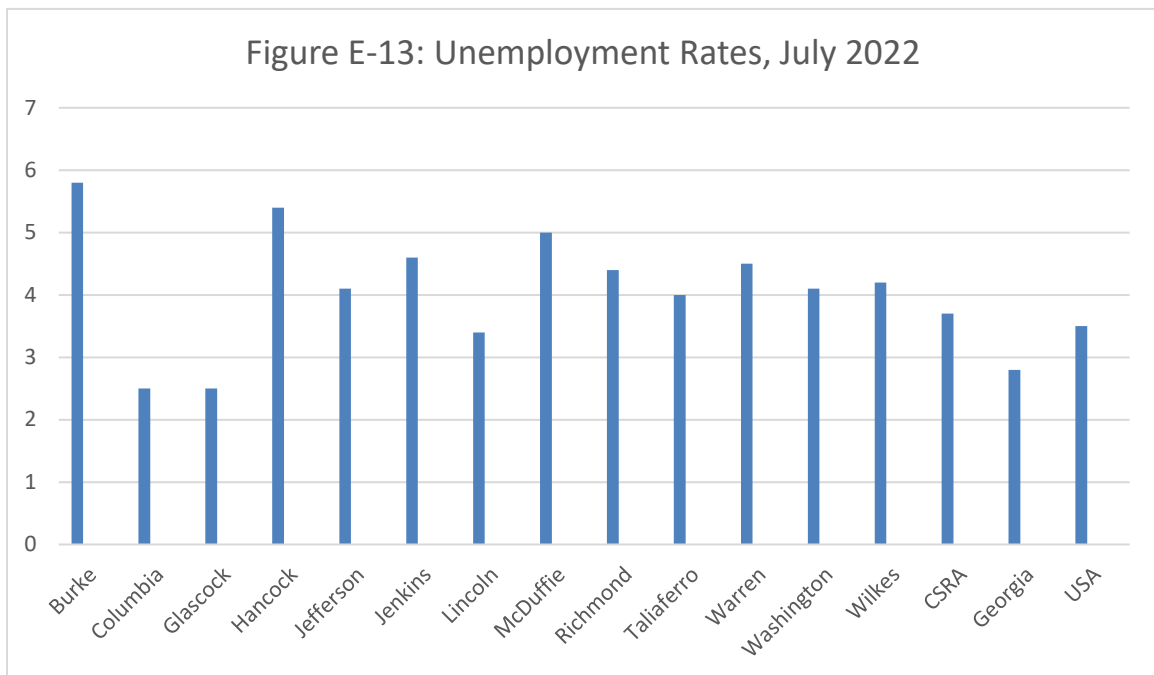
	CSRA	Georgia
Civilian Labor Force	209,902	5,072,155
Employed	200,865	4,983,732
Unemployed	9,037	206,237
Unemployment Rate	4.3%	3.9%

Source: Georgia Department of Labor - 2021 Labor Force Estimates



Source: Georgia Department of Labor; U.S Department of Labor

Examining unemployment rates by county with the most recent available data from the Georgia Department of Labor (July 2022), it becomes clear that unemployment rates have dropped significantly since 2010. (Figure E-13). Burke, Hancock, and McDuffie counties have the highest unemployment rates in the CSRA.



3.8 PROJECTED JOB GROWTH

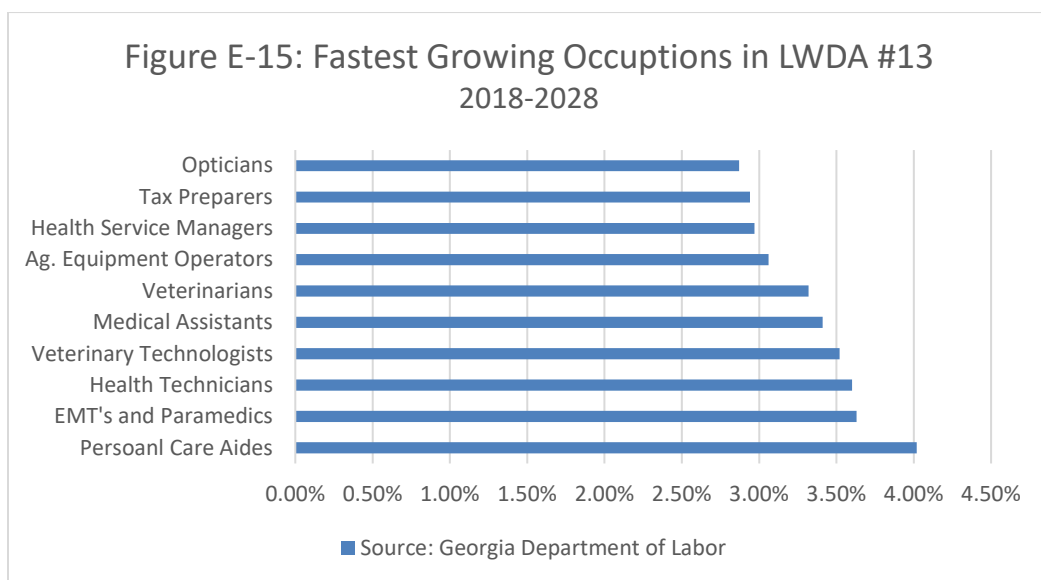
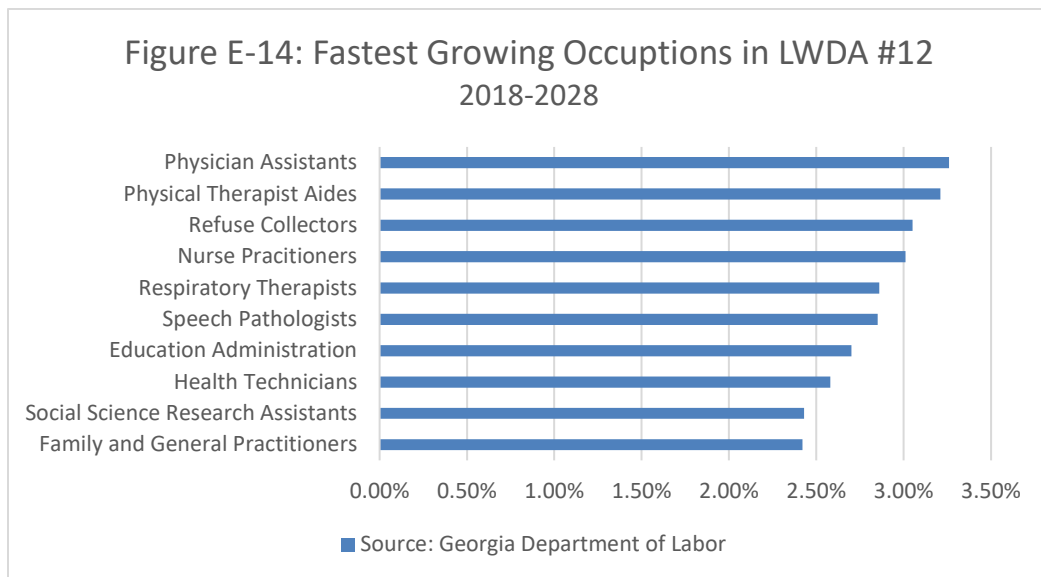
The CSRA economy was built on traditional industries such as manufacturing, which remains a critical sector. Changes in the regional economy have made growth industries such as health care, social services as well as finance and information technology, the areas in which job creation will occur. These industries will play an increasing role in the area's employment picture over the next decade.

This following analysis of projected job growth is based on the *Georgia Area Workforce Trends: Projections to 2028*. The analysis is from the Georgia Local Workforce Development Area (LWDA) as defined by the Georgia Department of Labor. LDWA #12 includes Burke, Jefferson, Jenkins, Jefferson, and Richmond. LDWA # 13 includes Columbia, Glascock, Hancock, Lincoln, McDuffie, Taliaferro, Washington, and Wilkes counties.

The Georgia Department of Labor projects 25,600 occupational openings between 2018-2028.

FASTEST GROWING OCCUPATIONS

The fast-growing occupations will have better employment prospects than occupations with slow or declining employment. Most of the annual job openings will result from both the need to replace workers who change jobs and new job creation. The majority of new job openings in in both workforce development areas will be in health care field.



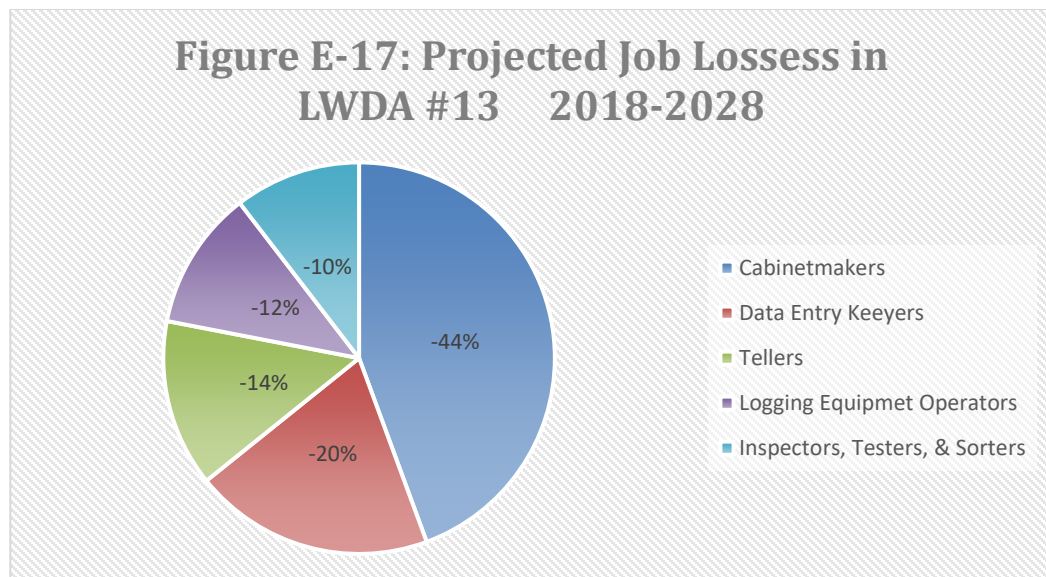
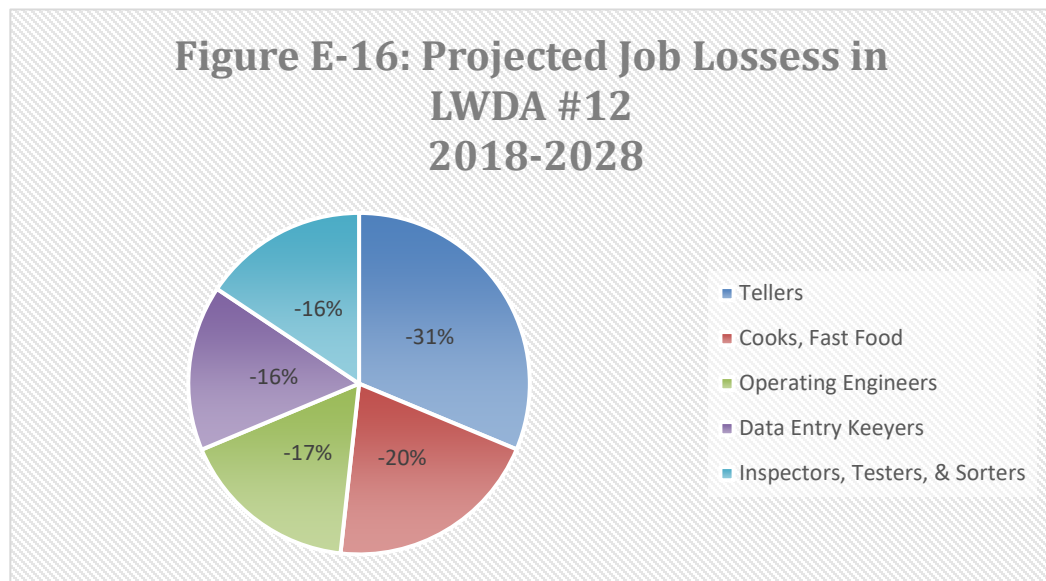
TOTAL INDUSTRY GROWTH

Table E-17 indicates the projected annual occupation openings between 2018-2028. Office administration, food preparation, and sales will have the most openings.

Table E-17: Annual Occupation Openings, 2018-2028			
Occupation	LWDA #12	LWDA #13	Combined
Management	660	610	1,270
Business and Financial	450	190	640
Computer/Mathematical	140	90	230
Architecture/Engineering	40	10	50
Life, Physical, and Social	110	10	120
Community/Social Service	160	120	280
Legal	40	10	50
Education/ Training/ Library	870	550	1,420
Art/Design/Entertainment	230	60	290
Healthcare Practitioners	980	110	1,090
Healthcare Support	610	180	790
Protective Services	370	130	500
Food Preparation	1,990	1,180	3,170
Building/Grounds Maintenance	630	360	990
Personal Care	520	440	960
Sales	1,890	1,010	2,900
Office Administration	2,260	1,060	3,320
Farming, Fishing, and Forestry	290	550	840
Construction	980	370	1,350
Installation / Repair	600	300	900
Production	830	430	1,260
Transportation/ Moving	1,170	600	1,770
Total:	16,560	9,040	25,600
Source: Georgia Labor Market Explorer			

DECLINING INDUSTRIES

The Georgia Labor Market Explorer also provides data for the industries that are expected to see the most decline. Job losses are projected in various sectors. The greatest declines in LWDA #12 are expected to be Tellers followed by Food Service workers. Cabinetmakers and Data Entry personnel will see the sharpest declines in LWDA #13.



PLANNED JOB CREATING PROJECTS

Savannah River Nuclear Solutions and the Augusta Building and Construction Trades Council are expected to sign an agreement which will pave the way for construction of the new Savannah River Plutonium Facility and will provide approximately 2,500 jobs for construction workers, electricians, plumbers, and other skilled jobs. The 2,500 jobs only cover construction of the project and not the permanent employees who will work there. Construction is expected to begin in late 2022.

Denkai America announced it will locate its new manufacturing headquarters in Richmond County. The initial investment will be \$150 million to establish an ED copper foil production facility on a 115-acre site. The goal is to invest a total of \$430 million and create 250 new jobs over the next five years.

Aurubis, a German company will build a \$340 million copper recycling and smelting plant at the Augusta Corporate Park in Augusta, GA. This company will provide 125 new jobs and is slated to start production in January 2024.

Burke County has several promising prospects. The county is in the running for at least three projects: two medium sized companies and a large corporation that is looking to build on a 250-acre site in the industrial park. If the large company selects Burke County, construction will begin almost immediately.

Amazon recently built a warehouse and a fulfillment center in Columbia and is looking to expand. The company recently announced they would be adding more than 800 full-time, seasonal, and part-time roles in the Augusta area. The company is offering up to a \$1,000 sign-on bonus and seasonal employees will have the opportunity to transition to full-time positions.

There are two unnamed projects looking to relocate to Jenkins County. It is unknown the number of jobs that will be created.

McDuffie County has several industries expanding over the next 12 to 18 months. These expansions will create approximately 60 new jobs in the county. There is also another prospect looking to locate in Thomson with another 60-70 jobs expected.

Developing and maintaining a healthy economy requires an understanding of the underlying structures that contribute to individual sectors. It makes little sense to actively recruit very profit margin-sensitive industries if local and state taxes are substantially higher than other localities. It is also counter-productive to recruit major distribution centers if highway infrastructure is limited or in poor condition. Matching economic resources with the right recruiting strategy is vital to economic development efforts.

This section examines the CSRA's economic growth potential by assessing a range of variables businesses use to make location decisions. While determinants vary from industry to industry, most businesses examine the following issues during the site selection process:

- Infrastructure availability and quality
- Health of nearby major metropolitan areas
- Business friendly atmosphere
- Labor availability and costs
- Taxes

CSRA counties have active economic development programs and expend substantial resources providing assistance to their existing business base. Competition for new businesses is fierce, and local and state incentive packages continue to grow. Increasingly, only communities with substantial incentive packages to offer are successful in attracting major new employers.

The region's manufacturing sector has declined in recent years due to changing markets, corporate downsizing, and free trade. Many low-skill manufacturing jobs have left the CSRA for lower cost locations overseas. Decisions on facility closures or downsizing are generally not made locally and are outside of local control or influence. In most cases, local incentives cannot compete with national or international factors affecting the viability of local facilities.

From an industrial/commercial site selection standpoint, the CSRA remains a very attractive location. The availability of public infrastructure to support growth is already in place and has sufficient capacity. The region's challenges come from other similar communities throughout the southeast. These areas (for example, Savannah, GA, Charleston, SC, Memphis, TN) offer many of the same amenities available in the CSRA, and pursue new investment with the same vigor and focus. Competitors may even view CSRA businesses as potential relocation targets for their own efforts.

Cyber growth in Augusta is expected to grow over the next decade. On January 11, 2017 Governor Nathan Deal announced \$50 million in funding to establish the Georgia Cyber Innovation and Training Center in Augusta. This world-class training facility will combine expertise in academia, private industry and government to establish statewide cybersecurity standards.

Augusta's cyber workforce is estimated to be 2,880 not counting the military. The average pay for these positions are estimated to be \$76,489. When counting the military, Augusta's cyber workforce is estimated to be 12,716.

STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS (SWOT)

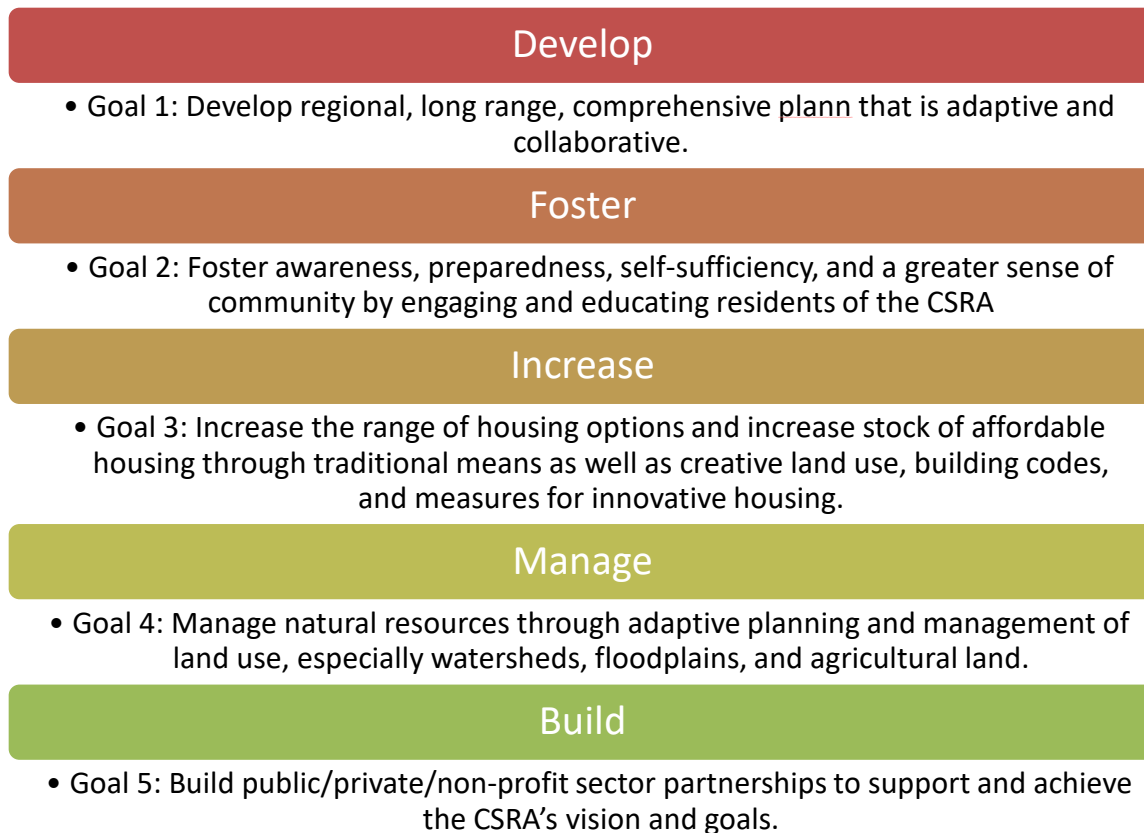
A SWOT (strengths, weaknesses, opportunities, and threats) analysis is a technique/method used to systematically gather and analyze information and identify issues and options facing an area. The SWOT analysis provides information that is helpful in matching resources and capabilities to the competitive environment within which a region operates. This framework helps decision-makers focus activities and resources into areas where they can be most effective, and is a key step in crafting an economic diversification strategy.

	STRENGTHS	WEAKNESSES
I N T E R N A L F A C T O R S	<ul style="list-style-type: none"> • Strong crossroads between Atlanta, Savannah and Columbia, SC. and easy access to ports. • Continued strong growth of the metropolitan economy. • Availability of adequate long-term water supply. • Intellectual capital (higher education opportunities). • International branding of Augusta (Master’s Golf Tournament). • Strong entrepreneurial spirit. • Parallels in strategies among economic development organizations. • Accessible industrial and commercial areas. • Community very responsible to business needs. • Favorable land use and zoning regulations. 	<ul style="list-style-type: none"> • Lack of employees for the service sector. • Tight labor market. • Low broadband infrastructure projects in rural areas. • Lack of “living wages” jobs available. • Unfinished infrastructure projects. • Lack of tech-oriented skilled workers. • Low test scores in schools. • Uneven growth. • Weak population growth in rural areas. • Inflation-rising costs for business and families.
	OPPORTUNITIES	THREATS
E X T E R N A L F A C T O R S	<ul style="list-style-type: none"> • Cyber Command Center. • Fort Gordon mission growth. • Energy sector growth (i.e., Plant Vogtle, Solar). • Area recreational facilities. • Biotech sector growth. • Strong entrepreneurial local business community. • Increased tourism. • Stabilizing and growing national economy. • Growing international markets need trading partners. • Increased foreign investment. 	<ul style="list-style-type: none"> • Loss of jobs in rural counties. • Lack of housing. • Business closures in rural areas. • Declining local revenue base. • Loss of anchor industries. • Lack of broadband infrastructure in rural counties. • Potential of overlap with other economic development organizations. • Too much regional competition (plentiful supply of well-located office space and land available in the southeast and therefor no compelling need for an employer to locate in the studied area). • Fluctuating commodity prices, particularly in natural resources. • Declining Industry Sectors. • Increase in development of automation, robotics and advanced manufacturing.

4.1 ECONOMIC RESILIENCY

In 2021, the CSRA Regional Commission created a resiliency plan called the CSRA Resiliency Framework. The framework represents the commitment of the 13 counties in our region to a more resilient future. This plan was developed with stakeholders representing local governments, non-profits organizations, the private sector, and citizens. During the planning process, the stakeholders identified shocks and stressors that may have a detrimental effect on the local economy and developed strategies to improve community resiliency

Figure D-1 (below) shows the Resiliency Goals established by the planning committee.



In a resilient economic sector, systems and markets can maintain function and quickly rebound from immediate shocks and stressors. There is also a diversified base, not overly reliant on any one sector of the economy. A well-trained workforce is also needed in the area with colleges, universities, and technical schools training the next generation of workers. Business continuity plans, backed up electronic files, and telecommunication redundancies reduce the time needed to get back to full operations.

Figure D-2 shows the key strategies needed to build economic resiliency in the CSRA.

Key strategies to build the resiliency of the CSRA include:

- Diversify the economy
- Build alternative career paths that build on different work and education experiences.
- Foster development of communities with a work, life, and play balance for all economic classes
- Build collaboration between groups focused on economic issues
- Improve economic stability for vulnerable populations.

4.2 INSTITUTIONAL CAPACITY

A key component of economic development understands the needs of existing businesses. Existing businesses may need training or access to capital in order to finance an expansion. They may require assistance finding skilled employees or in resolving land use issues. They may require knowledge of how to tap into new markets for their products. Institutional capacity measures the extent to which area agencies have the knowledge and skills to provide these and other services to businesses.

In the economic development process, government plays several roles: policy maker, financial partner, and regulator. Citizens to balance sometimes competing and conflicting community values and objectives call upon local government policy makers.

DEVELOPMENT AGENCIES

Table D-1 identifies various development organizations that support economic development initiatives in the CSRA.

Table D-1: CSRA Economic Development Organizations

	Number of Employees	Mission/Purpose	Services Offered
Augusta Metro Chamber of Commerce	11	Supporting and strengthening local businesses, and facilitating the location of new businesses	Data and information services, recruiting, property tours.
Burke County Chamber of Commerce	2	Promoting the health and general well-being of Burke County	Data and information services, recruiting, property tours.
Burke County Development Authority	2	Promoting the health and general well-being of Burke County	Data and information services, recruiting, property tours.
Columbia County Convention and Visitors Bureau	4	To recruit and support business location in Columbia County	Data and information services, recruiting, property tours.

Table D-1: CSRA Economic Development Organizations

	Number of Employees	Mission/Purpose	Services Offered
Columbia County Development Authority	3	To encourage new and expanding economic growth in the County	Data and information services, recruiting, property tours.
Augusta Economic Development Authority	5	Attract new business to the Augusta-Richmond County area	Data and information services, recruiting, property tours.
Development Authority of Washington County	1	Leading the economic development for the county	Data and information services, recruiting, property tours.
Forward McDuffie	3	Attract new business to McDuffie County	Data and information services, recruiting, property tours.
Jefferson County Chamber of Commerce	1	Supporting and strengthening local businesses, and facilitating the location of new businesses	Data and information services, recruiting, property tours.
Jefferson County Development Authority	2	Supporting and strengthening local businesses, and facilitating the location of new businesses	Data and information services, recruiting, property tours.
Jenkins County Chamber of Commerce	1	To recruit and support business location in Jenkins County	Data and information, existing business promotion.

Table D-1: CSRA Economic Development Organizations

	Number of Employees	Mission/Purpose	Services Offered
Jenkins County Development Authority	1	To recruit and support business location in Jenkins County	Data and information services, recruiting, property tours.
Lincoln County Development Authority	1	Promote economic development in our county, to create jobs and enhance the quality of life for citizens	Data and information services, recruiting, property tours.
Lincolnton-Lincoln County Chamber of Commerce	1	Supporting and strengthening local businesses, and facilitating the location of new businesses	Data and information services, recruiting, property tours.
Millen Downtown Development Authority	1	Promoting downtown Millen for investments and business location	Data and information services, recruiting, property tours.
Warren County Chamber of Commerce	1	To play an active profitable role in the community	Data and information services, recruiting, property tours.
Warren County Development Authority	1	To assist existing industries, and prospective companies with expansion or site location.	Data and information services, recruiting, property tours.
Washington County Chamber of Commerce	1	To provide the leadership necessary for the growth and development of all East Central Georgia	Data and information services, recruiting, property tours.

Table D-1: CSRA Economic Development Organizations

Washington Downtown Development Authority	1	Promote downtown Washington for investment	Data and information services, recruiting, property tours.
Washington Economic Development Authority	1	Promote the City of Washington for business location	Data and information services, recruiting, property tours.
Washington Urban Redevelopment Authority	1	Revitalize needed parts of the City of Washington	Data and information services, grants, project management.
Washington-Wilkes Chamber of	1	Promoting Washington-Wilkes County for investments and business location	Data and information services, recruiting, property tours.
Washington-Wilkes Payroll Development Authority	1	Promoting Washington-Wilkes County for investments and business location	Data and information services, recruiting, property tours.
CSRA Business Lending	6	To assist CSRA small business through partnerships with area banks	Loan processing, bank and Small Business Center referrals
CSRA Regional Commission	7	To provide planning, management and information services to members counties in a professional, ethical, cost effective and efficient manner; and to serve as a forum for addressing local	Data and information, project planning, grant writing.

The number of development groups reflects the region’s emphasis on economic development. In the past decade, public and private sector interests in the CSRA have focused increasing attention on economic development – particularly on job growth. Gradual losses in traditional manufacturing industries and a declining population base have resulted in concern about the area’s economic future. The decline in sectors such as manufacturing has also placed pressure on the region’s tax base. As economic restructuring occurring on the national and international levels has reduced the number of good paying low-skilled jobs in the manufacturing sector, rural counties have experienced disproportionately higher rates of unemployment.

COUNTY AND CITY GOVERNMENTS

There are a number of ways that municipalities support economic development efforts. First, one of the most significant direct actions municipalities can take is to provide the necessary infrastructure, including:

- Developing long-term facility expansion plans.
- Designing specific systems and projects.
- Raising or borrowing local funds to finance the projects or act as a conduit for state and federal funds; and
- Forming public-private partnerships to jointly develop projects.

Second, municipalities can deliver high quality and cost effective urban services. These necessary services include police and fire protection, parks & recreation, and a well-run land use planning and regulatory process. In addition, municipalities can actively participate in public/private groups designed to help businesses and the development community as they work their way through state and federal regulatory processes.

Third, municipalities can directly impact economic development by conducting market research or by investing and developing properties. For example, municipalities could develop, maintain,

and disseminate data and analysis on local development conditions and trends, as well as monitor important trends and assumptions upon which plans, programs, and strategies are based. In addition, municipalities can buy land, aggregate parcels, and make necessary improvement so that it is ready for new development or redevelopment. For some projects, municipalities (through the use of a development authority) can issue industrial revenue bonds or other tax-free municipal bonds. This also allows joint ventures with private sector partners for appropriate development.

Lastly, municipalities' public investment in urban facilities, such as city/county administrative offices, community centers, and cultural venues can be a factor in inducing further economic development. By targeting a sub-area for an infusion of redevelopment investment and daytime population, nearby businesses may see a greater captive market and also be encouraged to renovate and improve their establishments. Cultural and recreational facilities can have a wide range of economic impact, from simply attracting residents to a particular part of the city (e.g., downtown business district) more frequently to attracting visitors who will bring new revenue to the local economy through tourist expenditures.

CHAMBERS OF COMMERCE

CSRA counties all have active Chambers of Commerce, whose membership consist of hundreds of area businesses, and focused on business promotion, retention and expansion. Traditionally, the Chambers have provided advocacy support, marketing, services and information for their business members, and resources for start-up and growing businesses. They are the first point of contact for all non-industrial development.

Marketing – particularly the dissemination of information on the area - is a major function of area Chambers of Commerce. Most counties have developed chamber websites to provide visitors and potential businesses with information on their respective counties and the support programs they offer.

Figure D-1 presents a screen shot of Warren County's Chamber of Commerce website. The chamber website is typical of other CSRA chamber websites, and includes information about the chamber, a directory of area businesses and calendar of events. Contact information is provided for potential businesses interested in locating in Burke County

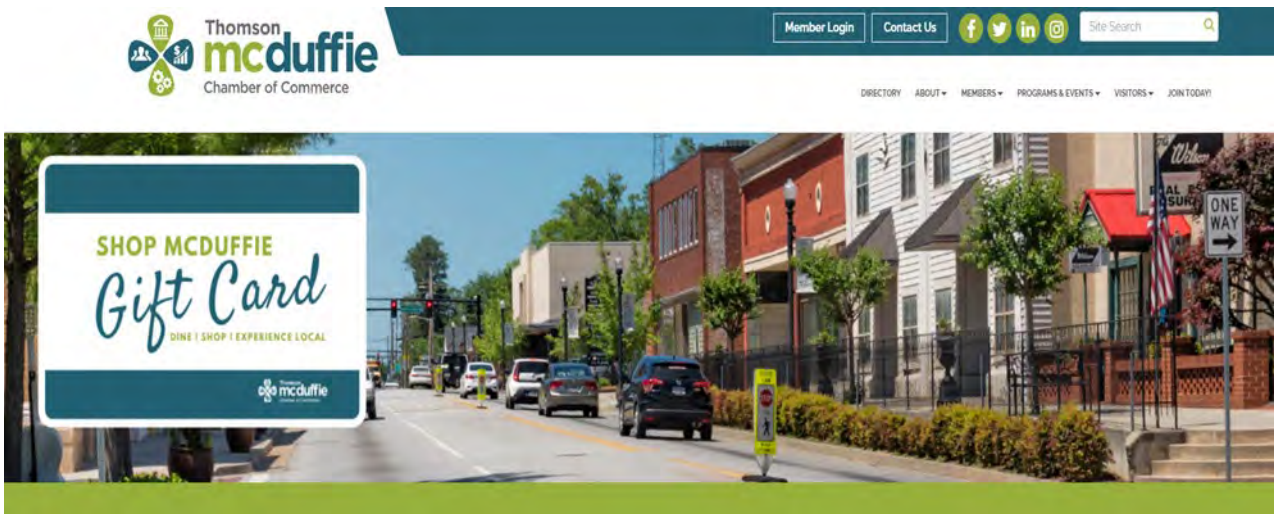
Figure D-3: Warren County Chamber of Commerce Website



Source: Warren County Chamber of Commerce <https://www.warrencountyga.com/chamber.html>

McDuffie County's Chamber of Commerce website is presented in Figure D-2. This website is focused on giving visitors an overview of the business climate in the county. In addition to news on events for current chamber membership, the website includes a very detailed guide on starting a business in McDuffie County.

Figure D-2: McDuffie County Chamber of Commerce Website



Source: McDuffie County Chamber of Commerce
<https://www.thomsonmcduffiechamber.com>

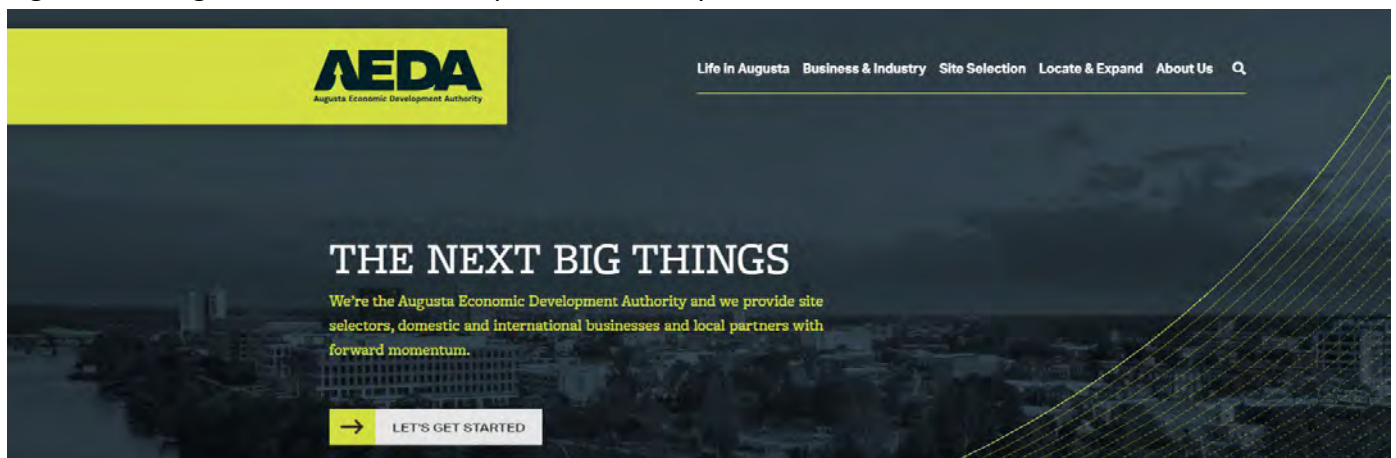
DEVELOPMENT AUTHORITIES

There are several county Development Authorities in the CSRA. Development Authorities are non-profit industrial development organizations, supported by a broad-based board of directors and their respective local governments. Over the years, the Development Authorities have been instrumental in attracting quality businesses to their respective counties. They provide confidential services to prospective businesses, including technical assistance, employee recruitment and training information, site selection services, financial assistance information, community network assistance, business development information, and retention and expansion services.

The Development Authorities have administrative funding and staff resources at their disposal and are charged with overseeing and coordinating all industrial development activities within their jurisdictions. The Development Authorities work to create and maintain an inventory of quality industrial and commercial land and buildings sufficient to meet market demand. They also play a key role in advocating for economic development tools, help organize economic development stakeholders within their county, and serve as a liaison with regional and state agencies.

Development Authorities throughout the CSRA provide similar types of information on their websites: (1) background on their communities, (2) available industrial sites and buildings, (3) aerial and parcel of maps of available sites, (4) information on water and sewer availability, and (5) incentive programs offered by local and state government programs (see Figure D-3 for a sample of content).

Figure D-4: Augusta Economic Development Authority



Source: Augusta Economic Development Authority, <http://www.augustaeda.com/>

DEVELOPMENT STRATEGY

The CSRA's development authorities have active industrial retention strategies, based primarily on the development of industrial and business parks. They have cleared, prepared and developed tracts of underutilized and vacant land as sites for business location and expansion. These activities are financed by a combination of municipal general obligation bonds and state funds.

This focus is simple to understand. At least two-thirds of the new industrial jobs come from expansion of existing businesses. These businesses are already providing their communities with jobs and tax dollars, are more likely to be responsive to community needs, and retain profits in the community. Promoting and assisting existing businesses is essential to ensure the retention and expansion of these companies.

DOWNTOWN DEVELOPMENT AUTHORITIES

Several CSRA cities, including Augusta (Richmond County), Millen (Jenkins County), Sandersville (Washington County), and Washington (Wilkes County) have active downtown development authorities (DDA). These were set up with the objective of revitalizing and enhancing distressed areas of their downtowns but over the years their mission has evolved to support economic development opportunities across a wide range of activities. As independent public units that are governed by a board of directors, DDAs work closely with local government and the private sector to strengthen the economic climate of their downtowns. The DDAs play a leading a coordinated strategy of economic development and civic design.

Marketing through the dissemination of information is relatively modest when compared to county chambers of commerce or development authority websites (see sample in Figure D-4).

Figure D-5: Downtown Development Authority of Augusta



Source: Downtown Development Authority of Augusta

<https://www.augustadda.com/>

REGIONAL DEVELOPMENT AGENCIES

CSRA REGIONAL COMMISSION

The CSRA RC is an association of cities and counties, designated by federal and state law, to engage in regional planning. The agency serves as an economic development and policy coordinating body within the region, bringing economic development stakeholders together to articulate a regional voice for economic development policy direction. The CSRA RC also seeks funding for economic development projects within the region, including federal grants from the Economic Development Administration (EDA), and coordinates with other parties to find additional funding sources for regional projects. It does not duplicate the activities of local and state operating agencies, but supports their needs with complementary regional-level planning and advocacy, and serves as a data center that collects, analyzes, and disseminates information vital to the citizens and governments in the region.



CSRA UNIFIED DEVELOPMENT AUTHORITY

The CSRA Unified Development Authority (UDA) is a joint development authority encompassing all 13 CSRA counties. The CSRA UDA serves to promote the economic development of the CSRA, encourage cooperation among economic development organizations within the member counties, and exercise all the powers and privileges (including tax credits) granted to development authorities pursuant to Georgia law.



AUGUSTA REGIONAL DEVELOPMENT ALLIANCE

The Augusta Regional Development Alliance (ARDA) is a council of the Chambers of Commerce and other economic development organizations throughout the CSRA. The primary purpose of the ARDA is to offer a forum of discussion and problem-solving for economic development professionals, who jointly pursue economic marketing, professional training and enrichment, and other special projects.



STATE GOVERNMENT

The Georgia Department of Economic Development (GDEcD) is the state’s sales and marketing arm, the lead agency for attracting new business investment, encouraging the expansion of existing industry and small businesses, aligning workforce education and training with in-demand jobs, locating new markets for Georgia products, attracting tourists to Georgia, and promoting the state as a destination for arts and location for film, music and digital entertainment projects, as well as planning and mobilizing state resources for economic development



The Georgia Department of Transportation (GDOT) is a key infrastructure provider in the CSRA, and has significant impacts on the area economy. GDOT works with multiple public and private stakeholders on economic development related projects. The State levies a state gasoline tax, a portion of which is administered by GDOT, including an authorized grant program to fund local government transportation projects.



The numerous universities, community colleges, technical and vocational institutions, and the K-12 school system in the region lay the critical groundwork for a skilled workforce and a strong regional economy. Their major role in educating the current and future labor force and facilitating research initiatives linked to the private sector is a crucial component to economic vitality in the region.

STATE WORKFORCE DEVELOPMENT BOARD

The **State Workforce Development Board (SWDB)**, appointed by the Governor, is tasked with administering Workforce Innovation and Opportunity Act (WIOA) funds across the state and overseeing the Governor’s state workforce development initiatives. Their guidance is essential to sustaining Georgia’s competitive advantage nationwide in terms of workforce. The SWDB is comprised of business owners, members of the Georgia General Assembly, statewide agency heads, local elected officials, and representatives from other workforce groups.

QUICK START PROGRAM

Quick Start is an innovative economic development program designed to meet the needs of companies relocating and expanding in Georgia. Quick Start is nationally recognized for providing high-quality workforce training services at no cost to qualified companies. The

program, administered by the Georgia Department of Technical and Adult Education (GDTAE), provides flexible, customized training through a network of technical colleges, satellite campuses and associated universities. Recognized by such publications as *Expansion Management* and *Fortune*, Quick Start has offered services ranging from company orientation and advanced manufacturing technology training to productivity enhancement. Since 1967, more than 3,700 companies and 390,000 Georgia workers have benefited from this no-cost program.

FEDERAL GOVERNMENT

The Department of Housing and Urban Development provides access to community development block grants and economic development loan guarantees. The purpose of these programs is to help communities restore, renew, and create the economic base for future growth.

The Small Business Administration (SBA) provides long-term financial assistance, training services, and management counseling to small businesses and entrepreneurs. Small business incubators, technological transfer centers, and similar public-private partnerships use SBA resources to promote start-ups and nurture growth within the business community. SBA also provides an array of technical and business assistance through their Small Business Development Centers (SBDC).

The Department of Justice administers the Job Training Partnership Act (1994), which provides job training and employment assistance.

The Department of Commerce administers the Economic Development Administration, which assists distressed communities create jobs and spur economic growth and development programs. The Minority Business Development Assistance Agency helps minority groups enter the private marketplace or expand their business, and the International Trade Administration helps United States exporters compete more effectively in the world market.



The Department of Agriculture is the primary rural and small town federal economic development agency. Through its Rural Development Program, the department offers business and industrial loan guarantees, community facility loans, and water and waste disposal grants and guarantees.

The Department of Labor administers the Workforce Investment Act of 1998, which works to consolidate, coordinate, and improve employment, training, literacy, and vocational rehabilitation programs in the United States.

ASSESSMENT

CSRA Counties benefit from strong and substantial institutional capacity, with highly skilled and specialized economic development professionals. The primary organizations working to reinforce and strengthen study area economies (Development Authorities, Chamber of Commerce, downtown organizations) and their affiliates form a strategic alliance among themselves and state/federal agencies to advance economic development in the area.

The partnerships between these organizations and the CSRA RC results in local and regional economic development services needed to implement economic development strategies. Without such partnerships and coordination, individual counties would be forced to provide these functions in-house, requiring higher levels of expenditures to pay and support staff.

The region aggressively promote new development and improved public and private amenities for both existing and prospective businesses. They have invested in infrastructure, land acquisition, and have collaborated with entrepreneurs, offering tax and other incentives to promote private investment.

The type of leadership required for the new services-based economy, partnering government, business and education, has been on-going during the last decade in the area. There are fairly strong linkages around economic development among public, private, education and nonprofit leaders and institutions. Such linkages will only strengthen the CSRA economy.

Institutional strengths are also evident at the state level. Georgia was one of the first on the policy scene with programs to support the transition from manufacturing to the service-based economy. Georgia's Small Business Development Centers are considered to be among the best in the nation and viewed favorably by businesses. The state's Quick Start program resulted in Georgia being ranked first in the nation for its workforce training programs by *Expansion Management* magazine in 2001. Georgia's long track record of small business assistance and workforce development programs has provided the CSRA with a strong competitive advantage.

The CSRA's jurisdictions generally have well established chamber of commerce and development authority websites that provide the necessary information new businesses need to make location decision. The various DDA's should include website additional content on available downtown properties and the types of industry they want to attract.

4.3 DEVELOPMENT TOOLS

The CSRA’s Development Authorities have formal business incentive programs and evaluate each request for assistance on a case by case basis. Decisions on each request are made by the respective Development Authorities and local governments based on the availability of resources, and the cost-benefit of providing the incentives.

In Georgia, the direct actions that local governments can take to encourage economic development have historically been less limited than in other states. In the past two decades, several important tools have been made available to local communities to help encourage development and attract or retain jobs. These include:

- Community redevelopment financing (similar to tax increment financing)
- Tax abatement
- Community empowerment zone designation
- Community renewal programs
- Tax deferrals and exemptions for certain business investments
- Industrial revenue bonds

Table D-2 inventories local, state and federal development tools.

Table D-2: Economic Development Incentives		
Incentive	Provider	Explanation
Revenue Bonds	Local	Financing instruments issued through Development Authorities. Both taxable and tax-exempt revenue bond financing is available at competitive, below-prime interest rates. RBs provide financing for land, building and equipment acquisition for new and expanding manufacturing plants.
SPLOST Funds	Local	The Development Authorities also have SPLOST funds available for short-term loans.
TSPLOT Funds	Local	In 2012, the communities in the CSRA region approved the collection of a special purpose local option sales tax for transportation (TSPLOST) for the next ten years. General TSPLOST information is available at http://www.ga-tia.com . A specific list of the region's 84 regional projects that voters

Table D-2: Economic Development Incentives		
Incentive	Provider	Explanation
		<p>approved, along with the status of each, is available at http://www.ga-tia.com/Project/List/csra.</p> <p>Planning staff work closely with state, local, and metropolitan planning organizations to provide expertise on many transportation related projects. The Commission actively works on projects such as Safe Routes to Schools®, bike and pedestrian programs, Georgia Scenic Byways, corridor management plans and the Transportation Investment Act (TSPLOST) program</p>
CSRA Revolving Loan Fund	Local	CSRA Revolving Loan Fund – An internal revolving loan fund of CSRA Business Lending. Loans up to \$150,000 are available for most purposes.
One Georgia Edge Fund	State	Special financial assistance is provided to eligible applicants for locating economic development projects. Response to applications is quick due to the sensitive nature of projects and their tight timeframes. Eligible applicants include city/county governments, development authorities or other public entities.
One Georgia Equity Fund	State	The purpose of this fund is to provide a program of financial assistance that includes grants or loans and any other form of financial assistance to provide for infrastructure, services, facilities and improvements.
Georgia's Business Expansion and Support Act Job Tax Credit	State	Tax liability for any one-year may be reduced by a maximum of 100%. Eligible businesses include those involved in manufacturing, warehousing, distribution, processing, tourism and research and development. This credit may be carried forward up to ten years. For Augusta, a \$2,500 tax credit is available for the creation of 10 jobs
Georgia's Business Expansion and Support Act Investment Tax Credit	State	Available to manufacturers or telecommunications companies having a presence in Georgia for at least 5 years. The company must spend at least \$50,000 on an expansion project.
Optional Investment Credit	State	Larger credits can, depending on location, offset up to 90% of a manufacturer's increased income tax liability following a

Table D-2: Economic Development Incentives		
Incentive	Provider	Explanation
		major expansion. These larger investment tax credits can be carried forward for 10 years but may not be taken in conjunction with the job or investment tax credits. For Augusta, a minimum investment of \$10 million results in an 8% tax credit.
Retraining Tax Credit	State	Firms providing retraining for employees may receive a tax credit of 25% of their costs, up to \$500 per participant, to a maximum of 50% of state income tax liability.
Corporate Headquarters Tax Credit	State	Companies establishing or relocating their headquarters to Georgia may be eligible for a tax credit if the headquarters is defined as the principal central administrative offices of a company. New jobs created at the new headquarters must be full-time and must pay above the average wage.
Ports Job Tax Credit	State	Companies that increase traffic shipped through Georgia ports by 10% or more in a year may be eligible for larger job tax credits. The amount of the bonus tax credit for qualifying firms is \$1,250 per job. Applicants must also be eligible for job tax credits under the B.E.S.T. legislation.
Research and Development Tax Credit	State	A tax credit is allowed for expenses of research conducted within Georgia for any business or headquarters of any such business engaged in manufacturing, warehousing and distribution, processing, telecommunications, tourism and research and development industries.
Sales Tax Exemptions	State	In certain circumstances, sales tax exemptions are available for manufacturing machinery, raw materials, purchase for resale, machinery purchased new and used directly in the manufacturing process, pollution control equipment, machinery components, computer equipment, primary material handling and electricity.
Small Company Business Growth Tax Credit	State	A tax credit is granted for any business or headquarters of any such business engaged in manufacturing, warehousing, and distribution, processing, telecommunications, tourism, and research & development industries having a state net taxable income which is 20% or more above that of the

Table D-2: Economic Development Incentives		
Incentive	Provider	Explanation
		preceding year if its net taxable income in each of the two preceding years was also 20% or more.
SBA Loans	Federal	SBA 504 can be used for fixed assets, such as land, buildings, machinery and fixtures. SBA 7(a) and Low-Doc can be used for most purposes, including inventory, working capital, vehicles and business acquisitions. CSRA Business Lending administers the SBA 504 program. A bank is the lender on the 7(a) and Low-Doc programs, with the SBA guaranteeing the loans
Source: One Georgia Authority; Georgia Business Expansion and Support Act; SBA Loan Program; CSRA Business Lending		

CSRA counties have historically participated in a variety of state and federal programs and services designed to foster and promote economic growth. Community Development Block Grants (CDBG), Georgia Department of Transportation (GDOT) industrial access funding, and the Governor’s Discretionary Fund (GDF) have all been used to support local economic development initiatives.

State government also aids through grants and loans to local governments under the One Georgia program for industrial infrastructure and other economic development support programs. During the last several years, infrastructure improvements for economic development have accelerated. Since 2002, One Georgia grants have been awarded to 72 CSRA projects totaling \$39,147,355.35 (Table D-3). Data was collected for the Georgia Department of Community Affairs website.

Table D-3: Awarded OneGeorgia Funds			
County	Number of Awards	Amount of awards	DCA Program
Burke	4	\$3,480,000.00	Edge, Equity
Columbia	1	\$115,968.00	Equity
Glascock	1	\$500,000.00	Equity
Hancock	4	\$3,215,000.00	Edge, Equity
Jefferson	9	\$4,299,954.00	Edge, Equity
Jenkins	6	\$3,298,298.21	AIRGeorgia, Equity
Lincoln	4	\$1,793,005.00	Edge, Equity
McDuffie	6	\$2,612,000.00	Bridge, Equity
Richmond	17	\$10,952,610.20	Bridge, Edge, Equity
Taliaferro	1	\$1,000,000.00	Edge
Warren	5	\$2,446,979.00	Equity
Washington	9	\$3,333,976.71	Equity, Edge
Wilkes	5	\$2,099,544.23	Edge, Equity, and Strategic Loan Fund
TOTAL	72	\$39,147,355.35	

Source: Georgia Department of Community Affairs
<http://apps.dca.ga.gov/pad/padsearch.aspx>

The One Georgia EDGE Fund provides financial assistance to eligible applicants that are being considered as a relocation or expansion site and are competing with another state for location of a project; and, where the EDGE Fund is used when the health, welfare, safety and economic security of the citizens of the state are promoted through the development and/or retention of employment opportunities.

The One Georgia Equity Fund provides a program of financial assistance that includes grants, loans and any other forms of assistance authorized by (O.C.G.A.50-34-1 et seq.) to finance activities that will assist applicants in promoting the health, welfare, safety, and economic security of the citizens of the state through the development and retention of employment opportunities in areas of greater need as defined by the Georgia Business Expansion and Support Act (1994).

For businesses and individuals seeking long-term, low-interest rate financing for the construction or improvement of manufacturing facilities, single and multi-family housing projects, exempt financing is available both at the state and local level. The Georgia Department of Community Affairs is responsible for implementing a system for allocating the use of private-activity bonds, as permitted by federal law, in order to further the economic development of the state, to further the provision of safe, sanitary, and affordable housing, and otherwise to further the purposes of the laws of the state which provide for the issuance of such bonds.

ASSESSMENT

CSRA counties have significant track records in providing local incentives to support economic development projects. Because most economic development tools employ a combination of local, state and federal sources, it is difficult to compare local and state incentives to other communities.

CSRA counties use wide discretion in providing public funding to potential businesses. While the region cannot compete with very big metropolitan areas whose incentive packages can get much larger, they are not hampered by the state constitutional and regulatory limits on development incentives in other localities.

4.4 BUSINESS CAPACITY

Business capacity is an important indicator of a community’s ability to diversify its economic base. While government action can facilitate private investment, individual businesses ultimately make the decision to invest. Access to capital and support services is critical to business investment decisions.

ACCESS TO CAPITAL

Financial capital refers to the availability and use of financial resources for new investment. Financial capital, including information and technical assistance, is particularly important to entrepreneurial development. Lack of access to capital can make it difficult or even impossible for investors to start their businesses and for existing businesses to expand and grow their enterprises. Conversely, regions with a full array of capital resources provide investors with the opportunity to start and grow their businesses in the same community.

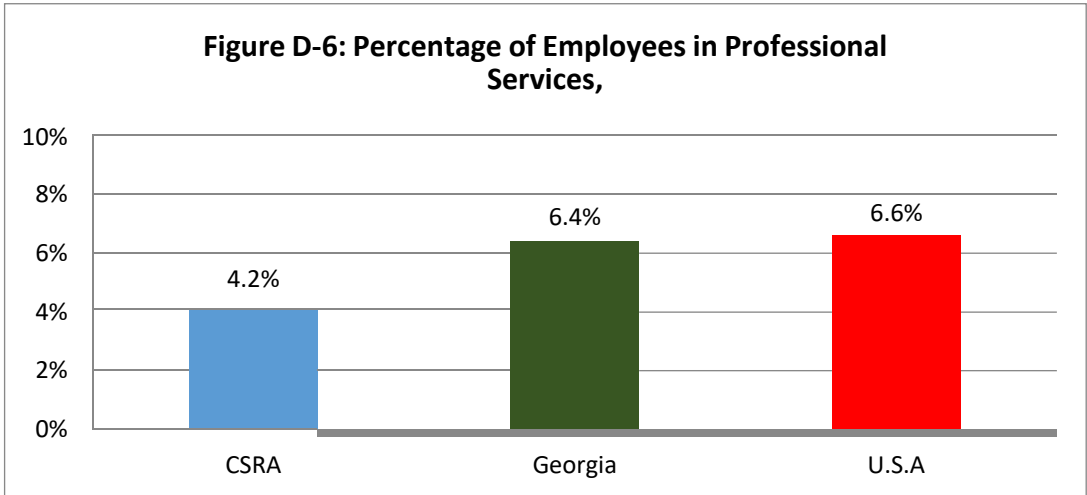
There are dozens of financial institutions that support business growth in the CSRA. These institutions range in size and scope from national banks such as Wells-Fargo to regional banks such as Southern Bank, to locally controlled banks such as the Bank of Burke County.

These banks and institutions render an adequate supply of debt capital in the CSRA. The structure of the banking industry in the region is supportive of capital availability. Typically, national and regional banks are more conservative lenders. The focus is on larger customers with less attention to the small business sector. In the CSRA, the reverse is true. Because of the relatively high number of small businesses, all banks cater to this clientele.

COMMERCIAL AND PROFESSIONAL SUPPORT SERVICES

The commercial and professional support infrastructure includes a number of services that assist entrepreneurs and existing businesses in their activities. This category includes locally available legal, accounting, marketing and other business services, but not banking and financial services (which are included in the previous section on financial capital). Potential investors need easy access to these services, and a one-stop shop with information about availability of services and provider expertise.

The CSRA includes dozens of businesses and 8,572 employees in commercial and professional support services. As a percentage of total employment, commercial and professional support services in the CSRA (4.2%) accounts for substantially less than the state (6.4%) and national (6.6%) averages (Figure D-6).



Source: Calculations by CSRA RC based on ESRI Business Summary (2020)

The availability of legal and accounting services is a source of strength for the region. Both subsectors include a range of independent local firms. Many local accounting and law firms cooperate with partners from across the state, accessing expertise and resources that may not be available locally.

Local providers are capable of assisting most types of businesses either using internal or external resources. The University of Georgia Small Business Center also provides commercial and professional support services to entrepreneurs, assists with business plans, and provides entrepreneurs the opportunity to present their ideas to banking representatives. The mentoring and volunteer counseling program is a major and well known asset.



Cooperation with local universities provides another resource for area businesses. For example, the accounting program at Augusta State University places students in local businesses for internships. Both sides benefit from the program - students gain more hands-on experience, and entrepreneurs and small businesses receive needed assistance. In many cases, businesses later hire interns as regular employees.

ASSESSMENT

Overall, business capacity is fair in the CSRA. The availability of financial capital can assist in establishing and expanding small and mid-size businesses that contribute to the area economies. Interest in SBA loan programs (both by banks and non-profit financial organizations) has increased the area's institutional capacity, thereby contributing to the CSRA's competitive advantage. A significant entrepreneurial base has also been developed over time due to the availability of financial capital.

An issue for the CSRA is the weak existing commercial and professional support infrastructure, when compared to other areas and the state average. Both the number of firms and employees in this area will need to increase in numbers if the sector is to assist existing and new businesses.

Business linkages are well developed among development agencies and the local and networked expertise to help entrepreneurs identify a provider that meets their needs. Consequently, entrepreneurs have to spend less time and energy finding business services with the appropriate expertise and (with few exceptions) remain embedded within the local and regional provider network.

4.5 TAXES

State and local tax structures play an influential role in shaping the CSRA's economic climate. Tax revenues fund the provision of key public infrastructure and services like transportation, education, public safety, and social services that are needed to support business activity and sustain overall quality of life. Yet if the tax burden placed on businesses is prohibitively high, especially for small businesses and start-ups, it can hinder productivity, cause companies to relocate, and diminish the region's ability to attract and retain high value industries. The challenge is to balance the tax burden in a way that is equitable, generating sufficient revenues to fund essential government services, while providing a competitive tax environment for the private sector.

STATE TAXES

Georgia's corporate income tax rate (5.75 percent). This tax applies only to the portion of income that is earned in Georgia. Its main components consist of state and local (a) retail sales and use tax, (b) business and occupation tax, and (c) property tax.

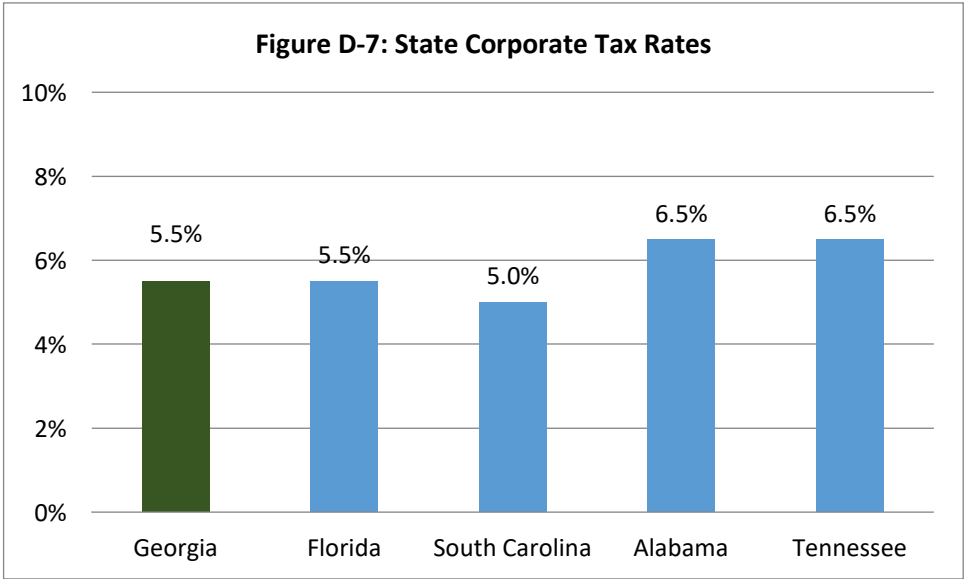
Georgia's license or occupation tax (annual tax based on capital stock and retained earnings commonly referred to as franchise or privilege tax in other states) is determined on a graduated

scale with the maximum tax being \$5,000. Domestic corporations are taxed on 100% of net worth. Out of state corporations are taxed only on net worth apportioned to Georgia.

A 4% statewide sales tax is paid by Georgia companies at the time of purchase. This applies to purchases (other than real estate) delivered or stored in Georgia to be used or consumed in the business. It includes natural gas, oil gasoline, telephone, artificial gas, steam, electricity, and rentals. An additional 2% county tax (Special-Purpose Local-Option Sales Tax) may be used for special local improvements.

There are no significant state tax differences among neighboring states. Taxes range from a low of 5% in South Carolina to a high of 6.5% in Alabama (Figure D-7). Similar to Georgia, all neighboring states have flat tax rates. Tax structures advantages tend to be mirrored regionally as the southeast has among the lowest tax rates in the nation.

There are no constitutional restrictions that limit local governments in recruiting businesses through the use of financial and tax incentives in Georgia.



Source: Federation of Tax Administrators (2022)

https://www.taxadmin.org/assets/docs/Research/Rates/corp_inc.pdf

LOCAL TAXES

CSRA counties and cities receive their tax revenue from two principal sources: property tax and sales tax. Property tax rates in all three counties are significantly below average (an average of some \$3 less per \$1,000 of property valuation than the national average), and among the most competitive in the nation.

As important as local taxes are taxes in adjacent metropolitan areas since many communities like the study area rely on a competitive economic environment in metropolitan areas to get new residents and the corresponding economic development opportunities that come with them. Table D-4 identifies the adjusted property tax rate for Augusta, Savannah and 15 other cities with similar population and regional characteristics included in the City of Savannah's *Comparable Cities Survey*. The survey was designed to evaluate Savannah's financial management goals through analysis of government expenditures and taxation. For validity purposes, city budgets were adjusted as needed to compare service delivery differences among local governments.

According to the survey, Augusta and Savannah's adjusted property tax rates are ranked 13 and 14 respectively among the group of 16 cities, among the best performing in the group. Even among other Georgia metropolitan (i.e. Athens, Macon, Columbus), Augusta enjoys a competitive tax advantage.



ASSESSMENT

Taxation levels are difficult to evaluate because of the methods different localities and states use to calculate them, although it is well known that tax rates in the CSRA are significantly below the state and national averages. Lower levels of taxation have been credited with the boom in southeast economies. Within the southeast region, the CSRA region is among the most competitive.

4.6 LABOR FORCE

Labor is a critical factor in today's global markets. The labor force is defined as the pool of individuals who are 16 years of age and over, and are either employed or who are actively seeking employment. Enrolled students, retirees, stay-at-home parents and other persons not actively seeking employment are excluded from the labor force. It is important to understand the difference between total jobs (identified in the economic trends section) and labor force participation rates. Total jobs are the total of all jobs available in a jurisdiction. The labor force participation rate is the total supply of workers within a jurisdiction (i.e. residents).

DISTRIBUTION OF AREA LABOR SUPPLY

The study area has an abundance of labor within a one-hour commute. A labor supply of approximately 600,000 resides within a 30-mile radius of the study area central point and over 1,200,000 within a 60-mile radius.

LABOR FORCE PARTICIPATION

The labor force participation rate in the CSRA Burke (43.1%) lies below the state (56.3%) and national (63.7%) averages (Table D-4). The relatively higher number of retired persons within those counties results in this substantial differential. Many military retirees settle in the region due to the proximity of the Fort Gordon Army Base.

The COVID 19 pandemic has negatively affected the labor force participation rate, as many never returned to the workforce.

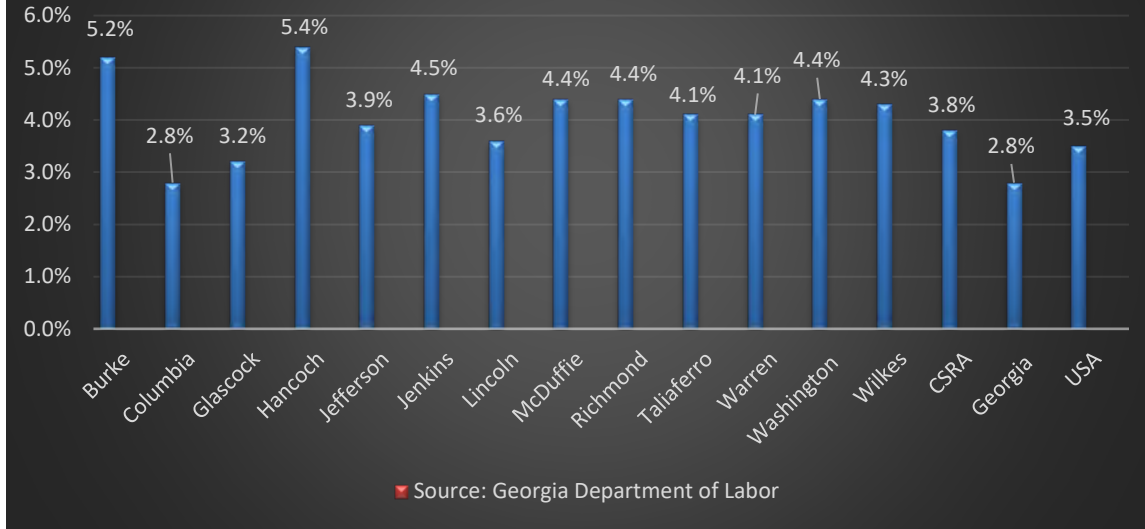
Table D-4: Labor Force Participation Rates, 2020 (Population over 16 years)

	CSRA	Georgia	USA
Work-Eligible Population	380,479	8,296,817	257,754,872
In Labor Force	226,718	5,524,983	163,276,329
% In Labor Force	59.6%	63.3%	63.3%

UNEMPLOYMENT

Unemployment rates are much lower than the past several decades. As of August 2022, Georgia's unemployment rate of 2.8% was lower than the nation rate, 3.5%. Historically, rural CSRA counties have had unemployment rates significantly above the state average. Hancock County has the highest unemployment rate in the region with 5.4%. A county by county breakdown can be found below (Figure D-8).

**Figure D-8: Unemployment Rates
August 2022**



EDUCATION ATTAINMENT OF THE WORKFORCE

Local workforce educational level is a major factor when companies examine potential locations for investment. Graduation rates and educational attainment are indicators of workforce quality.

The CSRA lies below the state and national averages in educational attainment, but that gap has been shrinking. In fact, the CSRA has fewer residents who failed to complete high school when compared to the state and nation. Only 3.8% of CSRA residents over the age of 25 have not completed high school. 4.5% of Georgia residents and 4.9% of USA residents over 25 have not completed high school. Table D-5 shows the education attainment across the region, state, and country. The CSRA has made huge improvements in graduating high school students.

Table D-5: Education Attainment for Population 25+ Years, 2020				
	CSRA Number	CSRA %	Georgia %	U.S.A %
Less than 9 th Grade	12,238	3.8%	4.5%	4.9%
9 th Grade – 12 th Grade (no diploma)	30,773	9.5%	7.7%	6.6%
High School Graduate	103,839	32.2%	27.5%	26.7%
Some College (no Degree)	67,081	20.8%	20.2%	20.3%
Associate Degree	30,364	9.4%	8.0%	8.6%
Bachelor's Degree	48,127	14.9%	19.7%	20.2%
Graduate or Professional Degree	30,090	9.3%	12.5%	12.7%
Total	332,512	100%	100%	100%
Source: U.S. Bureau of the Census, 2020				

LABOR COSTS

For most industries, labor costs are the highest capital cost and regional differences in labor costs can result in winning or losing a business. Competitive labor costs in the southeast have resulted in new auto plants, distribution centers and other large-scale industrial operations where labor costs are a significant portion of expenditures.

Table D-6 presents average weekly wages by industry. Like the other income and wage indicators noted above, the general trend is for wages to be significantly below the state average. While some sectors like Agriculture, Forestry, Fishing & Hunting, and Construction have higher weekly wages, in other categories the CSRA average is significantly lower.

Table D-6: Weekly Wage Rates for Selected Industries, Q1 2022

	CSRA	Georgia	Region vs. State Difference
Agriculture, Forestry, Fishing and Hunting	867	818	5.0%
Construction	1,593	1,327	16.7%
Manufacturing	1,212	1,216	-0.3%
Wholesale Trade	1,228	1,697	-38.8%
Retail Trade	658	722	-9.7%
Transportation & Warehousing	919	1,101	-16.5%
Information	1,114	2,290	-106%
Finance and Insurance	1,519	2,123	-39.8%
Healthcare & Social Assistance	1,037	1,161	-12.0%
Accommodation & Food Services	365	431	-18.1%
All Industries	1014	1,197	11%

Source: Georgia Department of Labor - 1st Qtr. 2022; Georgia Employment & Wages 2021 GDOL

ASSESSMENT

The labor force presents challenges for the CSRA. Below average labor force participation rates present a challenge to economic development efforts. Since 1990, labor force growth in the region has been relatively flat. The more residents are able to participate in the economy, the higher the probability of attracting new businesses and retaining existing ones.

Education attainment is significantly below the state and national averages. The region's weaknesses lies both in high school completion rates end at the upper level of the educational attainment scale, where the CSRA still lags in the percentage of residents holding bachelor, graduate and professional degrees. This challenge is especially important in attracting hi-tech and information technology jobs to the region. Despite the poor economy, some industries report a shortage of high-skill and high-tech workers. It may simply take time for the skills of the workforce to improve to the level needed by the region's higher-tech businesses. On the other hand, it will also take time for the CSRA's base of higher-tech businesses to reach a critical mass that can attract and keep skilled workers in the region. The challenge of balancing the needs of the region's employers, large and small, with the skills of the region's workforce will continue into the future.

The CSRA's low labor costs, as expressed in wage rates, provide it with a competitive advantage over other parts of the state and the nation. The region's low cost of living will continue to attract new residents and, by extension, increase the available labor supply available to existing and prospective businesses.

4.7 EDUCATION

PUBLIC SCHOOL SYSTEMS

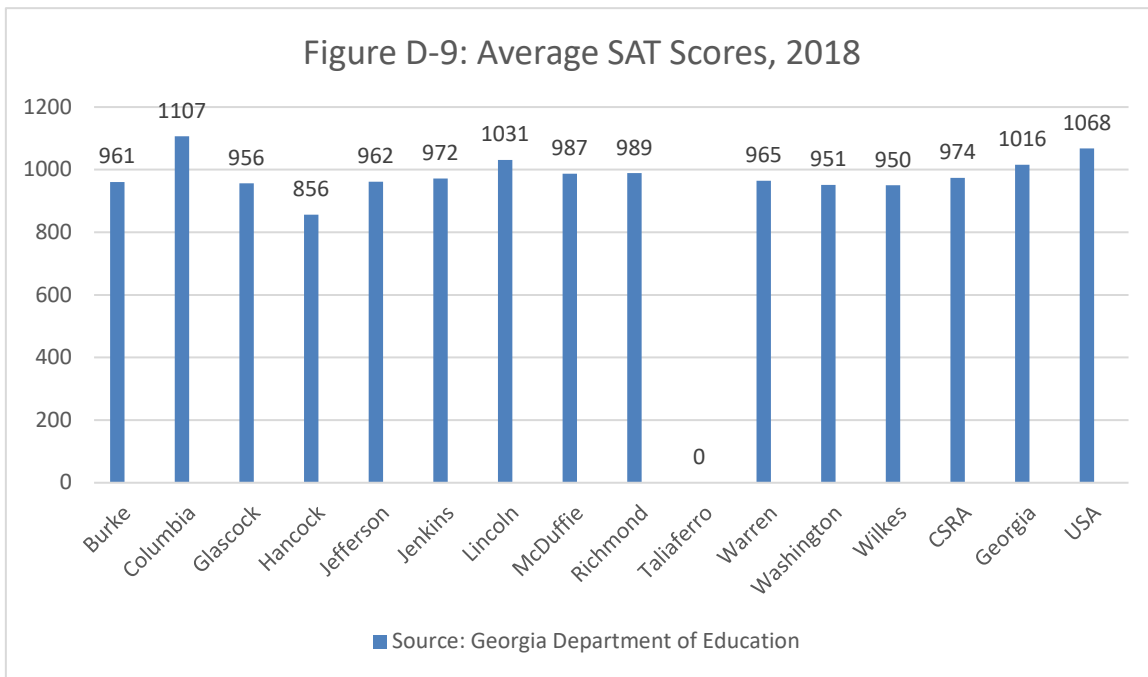
Public school systems are important for economic development in three ways. First, it is these schools that provide the education and skill foundation for future employees and business leaders in the study area. Secondly, school boards are among the largest employers of area residents. Increases or decreases in the level of employment by schools will impact the community's economic activity. Thirdly, the quality of public schools is a significant consideration to business leaders that are deciding where to locate their companies. Conversely, the quality of the public school system may be a key factor to skilled workers that are considering relocating to an area.

Any economy depends on an educated and healthy labor force. Labor is highly mobile, but the local systems and institutions that provide ways to support human resources are very important for community economic development. For example:

- Good schools attract families and are an important variable when firms decide where to locate.
- Availability of post-secondary training that can be tailored to a particular employer's or industry's needs is important for location decisions.

The CSRA counts hundreds of elementary, middle and high schools, and enrolls tens of thousands of students. How these schools perform on state and national standardized tests will determine readiness for higher education and employment opportunities.

SAT Scores for the CSRA are presented in Figure D-9. At 974, SAT scores for the region are 4.3% below the state average and 9.6% below the national average. Columbia and Lincoln counties are the only two counties with SAT scores above the state average.



Georgia Milestones Assessment System

The EOCT program was retired after the November 2014 Mid-Month administration. The Georgia Milestones Assessment System has replaced the EOC beginning with the 2015 school year. This is a comprehensive summative assessment program and represents a single system of summative assessments that span all three levels of the state's educational system—elementary, middle and high school. The system is designed to send consistent signals about student's preparedness for the next level.

Table D-6: Georgia Milestones Assessment System Scores (Grade 8)- Spring 2022

County	English	Math	Science	Physical Science	Social Studies
Burke	493.73	482.25	463.40	545.93	493.64
Columbia	522.02	526.23	495.32	577.53	529.50
Glascok	502.84	523.78	507.49	-	489.35
Hancock	485.96	471.24	470.04	-	473.18
Jefferson	490.18	473.65	470.59	-	488.58
Jenkins	495.48	506.75	519.18	-	507.67
Lincoln	516.61	524.85	514.78	-	513.73
McDuffie	495.10	480.34	452.03	510.79	489.08
Richmond	489.77	468.53	442.73	499.70	471.40
Taliaferro	496.47	476.88	467.88	-	481.41
Warren	500.75	507.08	473.72	-	486.03
Washington	491.80	490.27	478.31	521.04	487.44
Wilkes	509.71	503.83	484.47	-	509.28

Source: Georgia Department of Education, 2022

For an explanation for the scores, please visit the Georgia Milestones Assessment System at:

https://www.gadoe.org/Curriculum-Instruction-and-Assessment/Assessment/Documents/Milestones/Resources/EOG_Score_Interpretation_Guide_Spring_2022.pdf

HIGHER EDUCATION

Although many educational institutions have broad missions that include meeting the needs of a wide range of individuals and employers, it is primarily the local and regional two- and four-year institutions that are best able to focus on and respond to local economies. Technical colleges in particular have done an excellent job of responding to the needs of small and mid-sized businesses, and have demonstrated they can successfully juggle a variety of missions.

Table D-7 presents an inventory of area technical and comprehensive four-year colleges. Technical colleges graduate thousands of area students annually in over 100 diploma and certificate programs that include a wide variety of technical skills.

Four-year colleges and universities are important for businesses needing highly skilled workers as they provide advanced educational opportunities for the CSRA's residents. They also serve as major employers, generating significant economic impacts. There are three major colleges in the CSRA area: Augusta State University, Medical College of Georgia, and Georgia Southern University. There region is also home to a number of smaller four-year colleges, including the Paine College and East Georgia College.

Table D-7: Area Technical and Comprehensive Colleges		
School	Enrolled Students	Program Areas
Augusta University	9,606	Undergraduate degree, some graduate degree
Augusta Technical College	4,237	Certificates and diplomas in technical fields
East Georgia College	3,063	Liberal arts
Oconee Fall Line Technical College	1,428	Certificates and diplomas in technical fields
Georgia Southern University	20,517	Comprehensive undergraduate, graduate & professional
Medical College of Georgia	9,274	Medicine, health sciences, doctoral
Ogeechee Technical College	2,079	Certificates and diplomas in technical fields

Paine College	370	Undergraduate degree
University of Phoenix (Augusta Campus)	1,773	Undergraduate professional programs
Source: College websites		

ASSESSMENT

The K–12 education system in the CSRA is not as strong as it should be compared to elsewhere in the state. It may be an obstacle to the recruitment of new firms and residents. While SAT scores continue to climb in the past decade, performance on state achievement tests is still below the state average. Fortunately, the problem is recognized by leaders and strategies for improvement are being implemented. The success of these strategies will determine whether study area counties can turn this challenge into an asset, in support of existing and prospective businesses.

Area higher education institutions – technical colleges, comprehensive colleges as well as medical/doctoral institutions - are an asset to the CSRA’s economic development efforts. The technical colleges are credited with rapid response to industry changes and developing a technically sophisticated workforce that enhances employment opportunities for residents. The area’s four year colleges are supplying the region’s industries with highly skilled technology and financial service-sector workers that are crucial for the area economy. They are also an intricate component of institutional and business capacity.

4.8 INFRASTRUCTURE

The availability and quality of physical and communications infrastructure play an important role in economic development efforts. It is paramount to industrial and commercial development. While investment in infrastructure is not sufficient to guarantee success, it is often a necessary baseline.

Local governments play a major role in infrastructure. Beyond direct provisions of infrastructure such as roadways and utilities, they have the ability to influence infrastructure and investment

decisions through their regulatory role. Market conditions establish lease rates, building and land availability, and construction costs. Individual counties can impact these costs through zoning regulations, utility costs, and tax rates. Each industry will have specific infrastructure needs that they account for in site suitability analyses. There are, however, general infrastructure issues that are common to most industries.

BROADBAND INFRASTRUCTURE

Explosive growth in wireless and fiber-optic communication has provided many urban areas in Georgia with excellent broadband infrastructure. In many larger cities of the state, there are multiple providers who compete by offering lower prices and faster broadband speeds. However, not all the regions of the state have benefited from fiber-optic growth. Most areas of the CSRA outside of the urbanized parts of Columbia and Richmond Counties lag in both choice and quality of service. Most of these areas are not served by any land broadband service provider, making slower satellite internet service the only option. The CSRA RC considers broadband the region's top infrastructure priority and has been aggressively pursuing state and federal funding to remedy this deficiency by extending broadband infrastructure to areas of the region that currently lack it.

In today's hi-tech economy, telecommunications infrastructure is as vital to business development decisions as water, sewer and road systems. Telecommunications is critical in attracting and cultivating new employers as well as keeping existing businesses competitive. From small businesses to large manufacturers, telecommunications is a critical element in operating efficiency and access to the global marketplace.

TRANSPORTATION INFRASTRUCTURE

AIR SERVICE

The CSRA is served by two commercial services airports- one within the region and the other in proximity to the CSRA's southern counties. Augusta Regional Airport currently has 14 daily departures and 14 daily arrivals to four major hubs (Atlanta, Charlotte, Dallas, and Washington DC) from two carriers (Delta & American). In Calendar Year 2010, the annual passenger volume at the Augusta airport was 246,587 and peaked in 2109 with 673,631 passengers. The number of passengers declined in 2020 (318,388) because of the lockdowns associated with the COVID-19 pandemic. The number of passengers arriving in Augusta is gradually returning to normal, with 575,000 expected in 2022.

The airport depends heavily on the large companies in the area and the Department of Defense as customers. Local companies provide passengers on commercial flights, but several of them

also have corporate jets at the airport. These companies need their own jets, because their destinations (other company locations) are frequently in areas that do not have high quality air service. Currently, hangar space is a full capacity with no room for recent aircraft inquiries and no ramp available for development purposes. There are numerous projects being studied or underway:

- Terminal area planning study ongoing to accommodate current and projected growth.
- A consolidated rental car service facility is currently under construction off airport grounds, and this will free-up airport property for development. The estimated completion date is June 2023.
- Parking lot expansion is out to bid.
- Augusta University's Air-Med hangar is under construction. The estimated completion date is December 2022.

Savannah/Hilton Head International Airport is served by 6 airlines (Delta, U.S. Air and American Eagle, Allegiant Air, United, and Continental), that provide 37 daily flights to/from Dallas-Fort Worth, Newark, New York, Miami, Atlanta, Detroit, Washington, Charlotte and Chicago. In Calendar Year 2000, the annual passenger volume at Savannah/Hilton Head was 1,199,995, compared to 799,066 to Calendar Year 2009. The airport depends on the tourist traffic and the recession has resulted in decreased passenger volume.

Both airports lobby carriers to offer competitive prices for flights in and out of Augusta and Savannah. For many business customers, the convenience of a smaller airport (shorter checking and security check times) offsets higher prices. A direct flight to Atlanta or Charlotte which leaves early in the morning presents various connection options for business travelers.

Recently completed and planned improvements at both airports include terminal expansion, and associated runway and road improvements. These improvements could make the airports more attractive to business customers.

SURFACE TRANSPORTATION

The CSRA includes several U.S. and State Highways, and numerous local streets and roads which serve regional linkages to other parts of Georgia and the southeast.

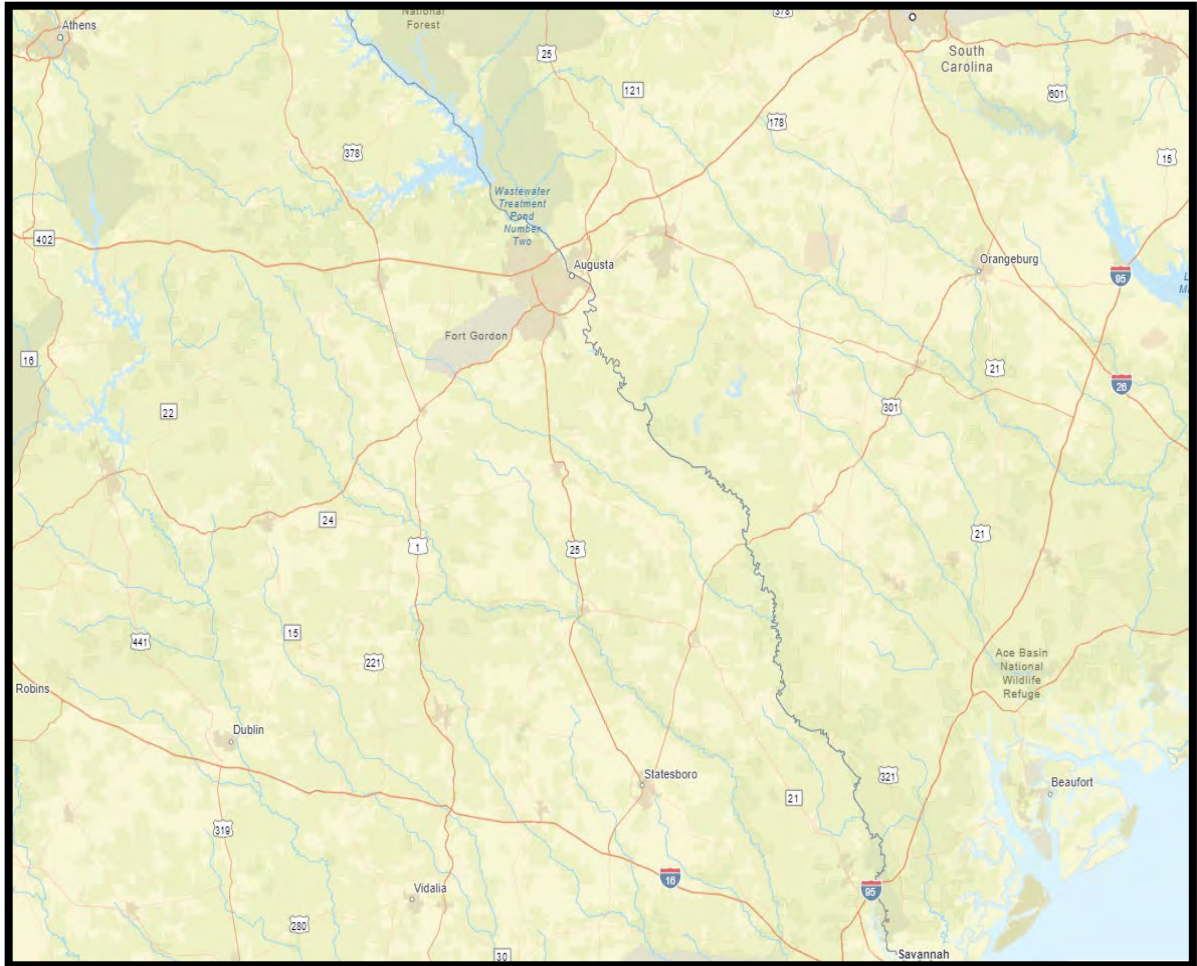
Interstates 20 and 520 are major east-west routes that connect the CSRA to South Carolina to the east and to the all of the nation’s southeastern states to the west (Figure D-10). U.S. Routes 1 and 25 are the CSRA’s major north–south highways that connect the region with Florida to the south and the Atlantic states to the north. Both these highways are part of the Governors Road Improvement Program (GRIP), which seeks to extend four-lane highways to all regions of Georgia. Both highways have been expanded to four lanes throughout the CSRA.

Table D-8 presents Levels of Service (LOS) for major roadway segments in the CSRA. LOS is a qualitative measure describing operational conditions of a roadway in terms of average speed, travel time, maneuverability, and traffic interruptions during peak travel periods. The measure contains six LOS categories, ranging from A to F, each describing the operating conditions associated with them: LOS A indicates free flow conditions while LOS F indicates excessive delays resulting in high levels of congestion. LOS is calculated by determining the ratio of traffic volume to roadway capacity for segments of individual roadways based on accumulated flow from collector roads within the traffic shed. The typical design level of a road represents an operational LOS C. This indicates that roads are designed to adequately handle 65% of the traffic capacity while maintaining a stable flow of traffic.

Table D-8: Level of Service Ratings for Selected Roadways		
Highway	Peak AADT	LOS Rating
I-520	92,500 (@Wheeler Road)	C or better
I-20	78,600 (@Columbia County Line)	C or better
U.S 1	35,100(@Barton Chapel Rd.)	C or better
U.S 25	33,500 (@ Bobby Jones Exp.)	C or better
Source: Georgia Department of Transportation Annual Traffic Counts (2021); Levels of Service Estimates by CSRA RC		

The data contained in Table D-8 suggests that the CSRA has increasing traffic counts in the Augusta metropolitan area. Traffic congestion is becoming more common along I-20 in Columbia County because of the population explosion and the new Amazon warehouses.

Figure D-10 shows the major highways across the CSRA.



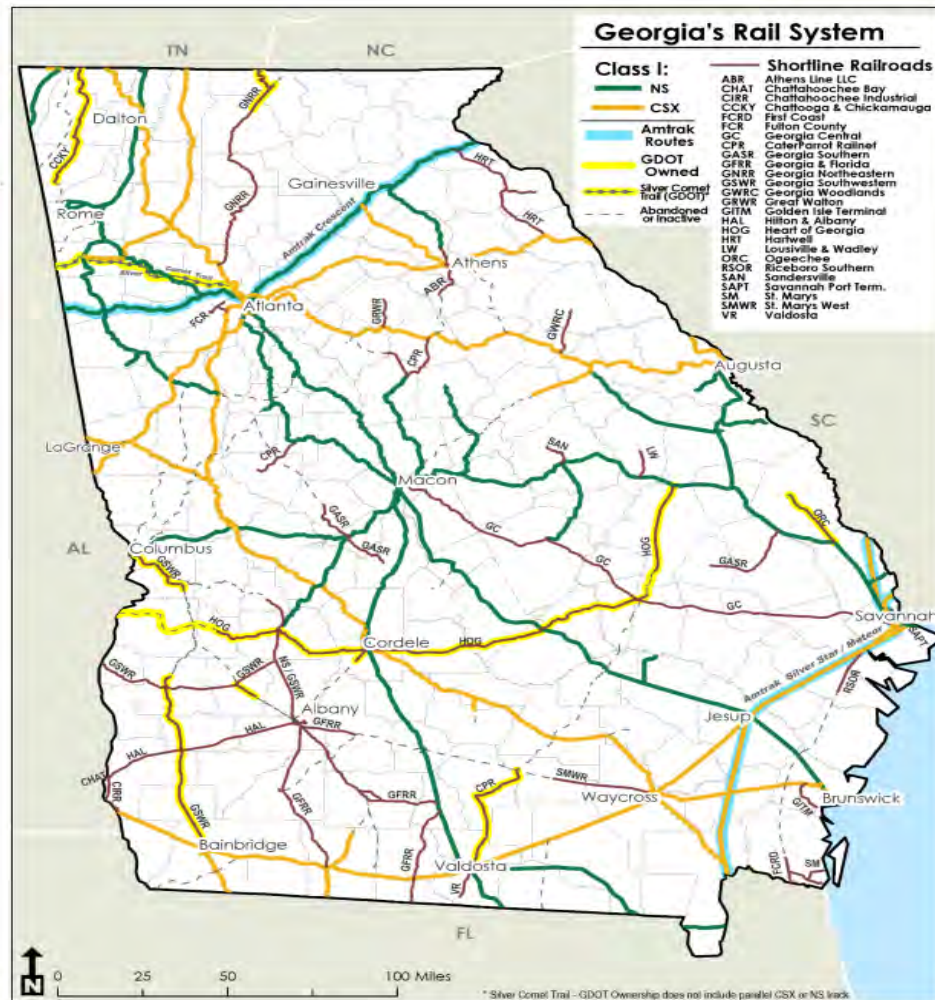
Source: Georgia Department of Transportation

FREIGHT TRANSPORTATION

Rail services can be a critical recruitment tool. The CSRA supports a robust freight transportation system that makes it a nexus for the movement of goods. Similar to the highway network, the region is a crossroads of major rail lines. Rail lines include a north-south Norfolk Southern line linking Augusta with Savannah and east-west CSX line linking Augusta with Atlanta. These rail lines support freight transport with daily trips through the region carrying grain products, clay and cement, metal & paper products, and minerals, as well as other materials for various manufacturing processes. Figure D-11 shows Georgia's Rail System.



Figure D-11 Georgia's Rail System



Source: Georgia State Rail Plan, 202

PORTS

The CSRA is served by two major nearby ports (Figure D-12). The Port of Savannah is a major U.S. seaport. Its extensive facilities for oceangoing vessels line both sides of the Savannah River approximately 18 miles (29 km) from the Atlantic Ocean. Operated by the Georgia Ports Authority (GPA), the Port of Savannah competes primarily with the Port of Charleston in Charleston, South Carolina to the northeast, and the Port of Jacksonville in Jacksonville, Florida to the south. The GPA operates one other Atlantic seaport in Georgia, the Port of Brunswick, located at Brunswick, Georgia, as well as two interior ports linked to the Gulf of Mexico, Port Bainbridge and Port Columbus.

Figure D-12 CSRA Proximity to Ports

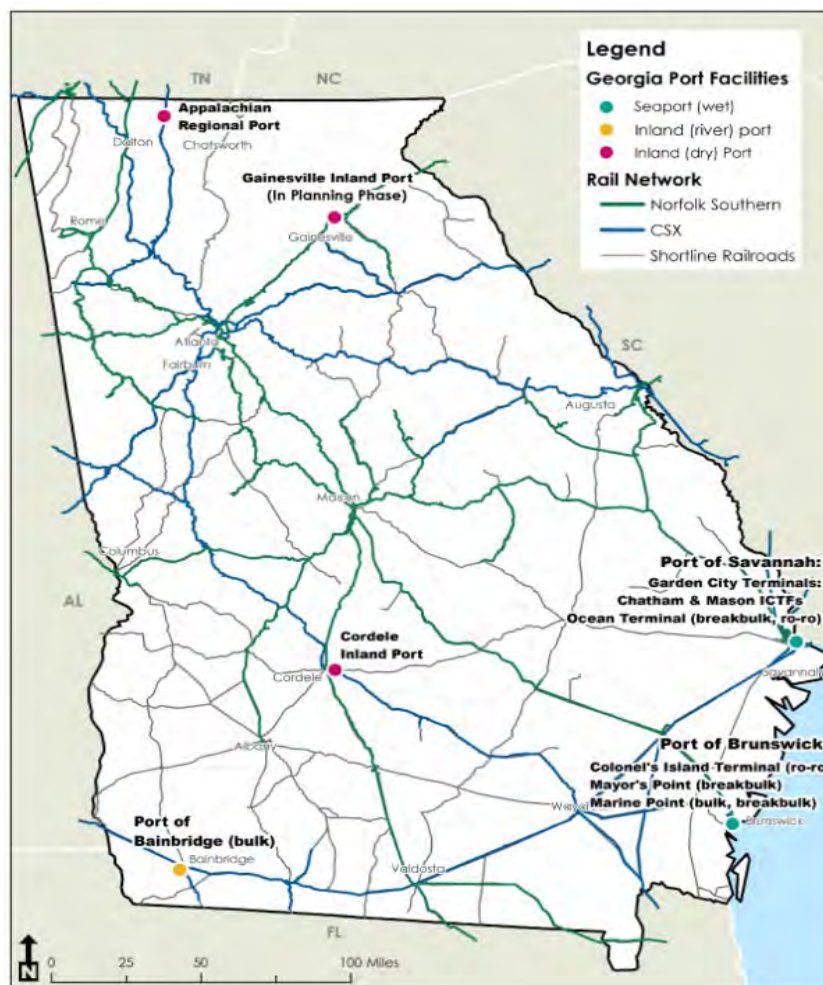


Figure D-12: CSRA Proximity to Ports

Source: Georgia Port Authority

As of 2022, Georgia's deep water ports and inland barge terminals support more than 561,000 jobs throughout the state annually, and contribute \$33 billion in income, \$140 billion in revenue, and \$3.8 billion in state and local taxes to Georgia's economy.

In August 2022, the Georgia Ports Authority reported the Port of Savannah handled 575 TEU's, an increase of 18.5% over the same month last year.

The Port of Savannah has moved a record amount of cargo in 2021, seeing containers up 20% when compared to the previous year. Overall, the port processed 5.6 million TEC's for the year. In 2007, the Port of Savannah moved 2.3 million TEU's, and increase of nearly 145% in the past 14 years. Further expansion is expected as the port expects to add 500,000 TEU's of annual capacity in 2022.

South Carolina Ports handled 2.85 million TEU's at Wando Welch Terminal, North Charleston Terminal and Leatherman Terminal in FY 2022. For pier containers, SC Ports moved 1.58 million containers during the same time period. Overall, SC Ports saw a 12% uptick in cargo in 2022, with more than 164,000 additional containers moving through the Port of Charleston than the year prior.

ASSESSMENT

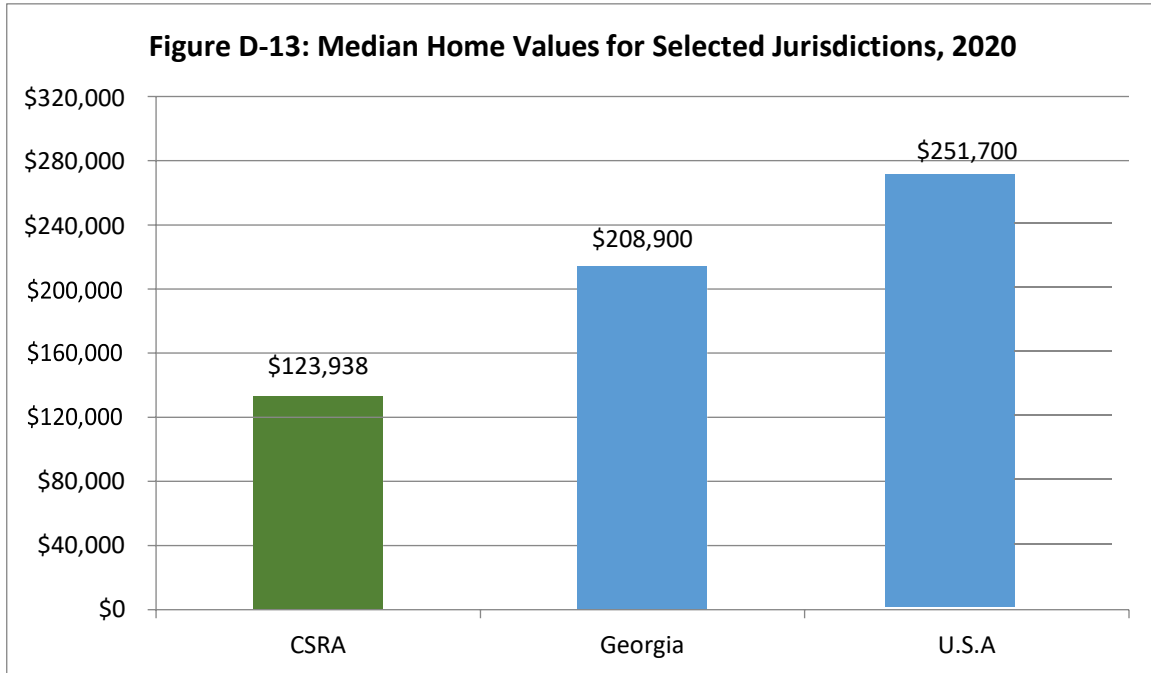
Adequate broadband infrastructure and services available in the CSRA are limited to small parts of the urban area. The land-based broadband network will need to be greatly expanded in all rural CSRA counties if these jurisdictions are to be competitive in economic development and growth initiatives.

The CSRA contains a thorough and efficient surface transportation system, particularly its road network. Even during peak traffic periods, the LOS in most of the CSRA's more congested roadways does not exceed level C. This provides an important competitive advantage as more and more industrial site locaters select areas void of significant congestion problems.

Given the proximity to transloading facilities in the CSRA and neighboring regions, CSRA jurisdictions are benefiting from rail service. Existing lines have the capacity to provide expanded freight service to existing and new businesses desiring such service. The availability of TRANS-FLO terminal capability with 46 rail carload/unload capacity and projected redesign of an entire rail terminal area to meet increasing capacity as a result of new industrial tenants in Augusta highlights the importance of rail to the CSRA.

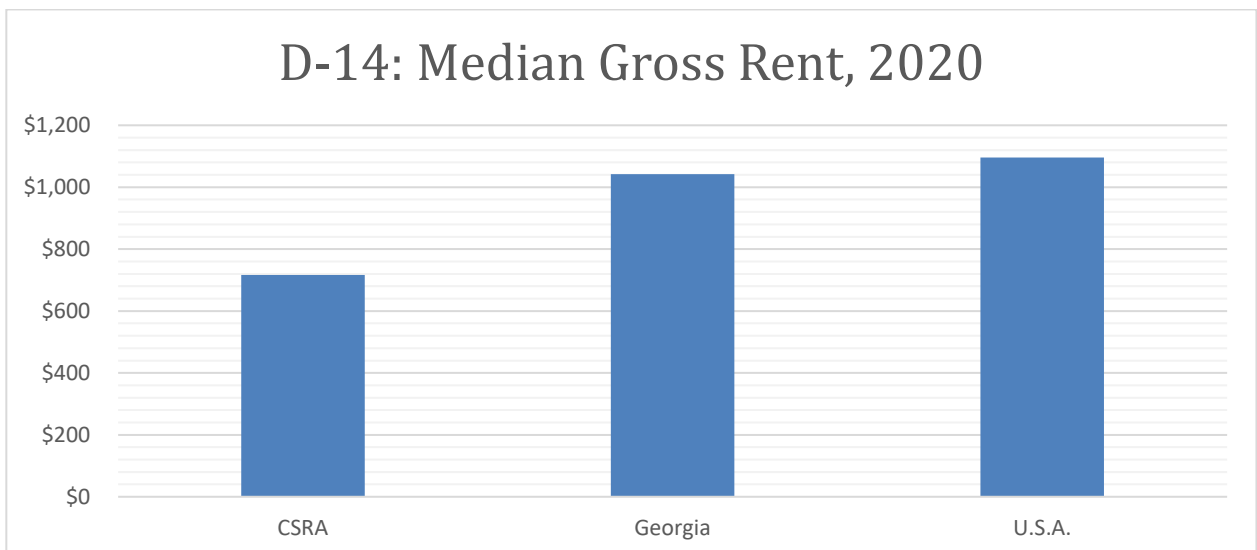
4.9 HOUSING

The availability of an affordable and adequate housing is critical for the growth of any area. Median housing values in the CSRA is \$126,938, significantly below the state (\$208,900) and national (\$251,700) averages (Figure D-13). These values reflect the lower housing values commonly found in rural parts of Georgia.

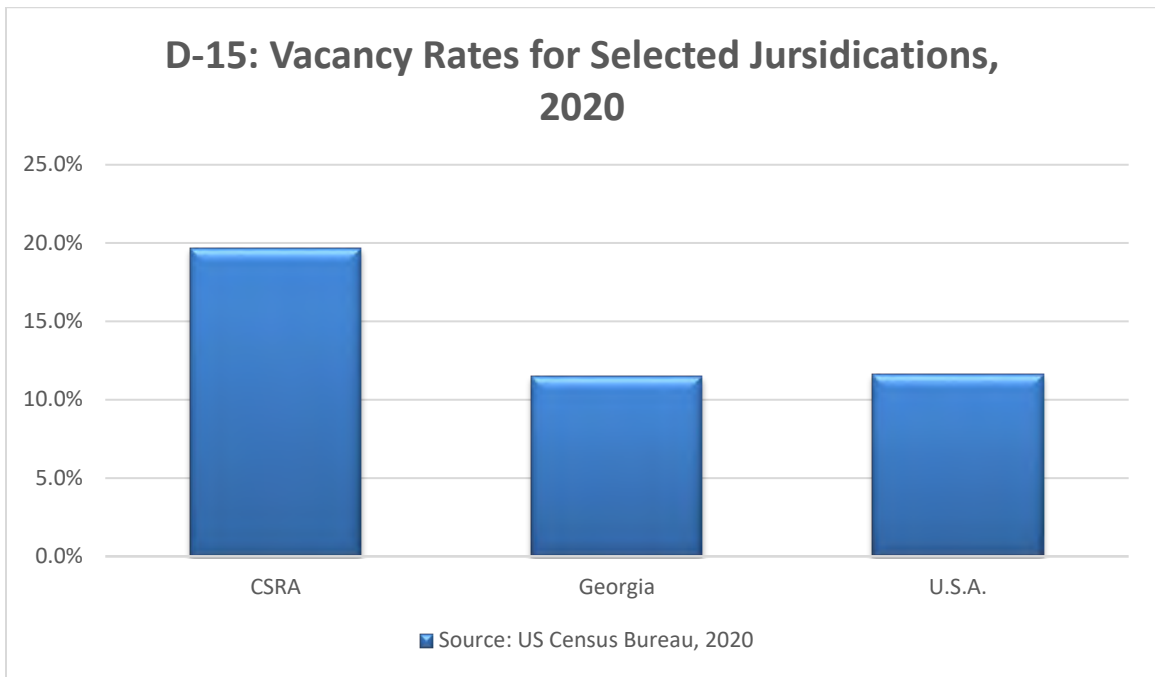


Source: U.S. Bureau of the Census (2020), S2506

Rents are similarly more affordable in the CSRA than elsewhere in the state and the nation. Median monthly rents average approximately (\$610), significantly below the state (\$879) and national (\$928) averages (Figure D-14).



The CSRA's vacancy rates average approximately 19.7%, significantly above the state (11.5%) and national (11.6%) averages (Figure D-15). Although this may reflect the availability of an adequate housing supply, the condition of these units is not known.



COUNTY COMPREHENSIVE PLANS

The purpose of a comprehensive plan is to offer guidance for the development of a county in the current and changing economy. Comprehensive plans are designed to analyze development trends, highlight potential problem areas, and provide possible strategies to the public and local government officials to use in their efforts to improve their county over the next five years. A review of all thirteen of the CSRA's comprehensive plans highlights the following cross-cutting economic development strategies:

- Infrastructure improvements are needed in order to help recruit new businesses.
- Build on major employers.
- Focus on retaining and expanding existing firms and industries.
- Actively support the chambers of commerce and development authorities.
- Make the necessary airport improvements.
- Focus on downtown commercial and residential development.
- Upgrade and expand existing industrial parks and develop new ones.
- Recruit small businesses and aggressively as major ones.
- Diversify local economies.

AUGUSTA AREA DIVERSIFICATION INITIATIVE

Conceived as a proactive regional endeavor to develop a framework for sound decision-making in the years ahead, the purpose of the Augusta Area Diversification Initiative (AADI) is to facilitate the implementation of economic policies designed to avoid overdependence on defense expenditures. The AADI represents an attempt to deal with short and long-range economic development issues. The overall plan goal is to foster a strong and diverse economy through a mix of industries that provide a healthy balance of goods-producing and service-producing jobs. Objectives and strategies to achieve this goal include:

- Target industrial recruitment which enhances economic diversification with a focus on value-added and niche manufacturing.
 - Target available financial resources to value-added and niche manufacturing.
 - Enhance labor force skills by guiding technical and occupational training in cooperation with technical schools and area colleges.
 - Survey hi-tech and niche manufacturers about skills needs.

- Work as needed with individual companies on expansion plans.
- Promote the Laney Walker Enterprise Zone for niche manufacturing.
- Encourage growth of warehousing and distribution industries within existing industrial parks and new locations along major highways and interstates.
 - Assemble large acre parcels to promote warehousing and distribution.
 - Adapt existing industrial parks to meet warehousing and distribution specifications.
 - Use federal transportation funds strategically to promote warehousing and distribution.
- Encourage the growth of business services and information technology.
 - Promote Augusta’s low business costs to recruiters.
 - Encourage capital improvement planning to target office space-oriented infrastructure improvements.
 - Conduct thorough inventory of downtown office space.
 - Promote former military IT labor supply to potential recruits.
 - Develop matching and mining database to link former military labor with existing and recruited businesses.
 - Coordinate with technical and four-year colleges to respond to increase in business services and information technology employment.
- Encourage the growth of biomedical industries.
 - Recruit top-notch biomedical faculty.
 - Promote MCG success to encourage venture capital.
 - Ensure appropriate land use around MCG to permit biomedical industry growth.
 - Encourage growth of existing business incubators.
- Expand the Augusta area’s tourism economy.
 - Support tourism-oriented projects such as a convention center and performing arts center.
 - Target funding to support the variety of arts programs and festivals which attract visitors to Augusta.
 - Coordinate with the Georgia Department of Economic Development to update the existing tourist survey.
- Encourage the growth of master planned communities.
 - Promote the Augusta area as a retirement destination.
 - Ensure sufficient land use for large retirement-scale communities.
- Develop downtown as a primary residential, office, tourist and retail destination.
 - Develop a downtown master plan.
 - Establish a Business Improvement District.
 - Locate future major tourist venues such as conference centers and performing arts centers in the downtown area.

- Market city and state funding programs to small businesses.
- Redevelop vacant properties with the use of grants and tax credits.
- Expand existing downtown festivals and special events.
- Retain and expand existing businesses.
 - Focus business expansion and job retention programs on targeted sectors and industries.
 - Monitor trends, issues and opportunities involving key sectors and industries.
 - Assist with targeted sector and industry retention/expansion business plans.
 - Host regular meetings with major employers to discuss current operations and expansion plans.
- Develop and nurture industry clusters for targeted sectors and industries.
 - Promote business assistance programs that support the cluster approach.
 - Expand incubator facilities where entrepreneurs can grow their businesses and receive specialized assistance during the early phases of their operations.
 - Refine the locational and supportive requirements for each cluster.
 - Expand the technical and professional training capabilities of area colleges in those areas supporting targeted sectors and industries.
- Strengthen institutional capacity geared towards targeted sectors and industries.
 - Ensure that local policies, regulations, and decision-making processes consider impacts on economic diversification efforts.
 - Conduct training sessions for public officials and staff on economic development to educate individuals regarding private sector perspectives of land development.
 - Coordinate among economic development partners to efficiently and effectively address economic development issues and opportunities and minimize duplication of effort.
 - Develop partnering relationships with other regions throughout the nation to build economic development coalitions.
- Build upon the existing education and workforce training that focuses on targeted sectors and industries.
 - Support cooperative efforts to coordinate education and job training programs among the school boards, technical and four-year colleges, and state workforce programs.
 - Encourage linkages between area colleges and employers that feature quality employment opportunities to retain skilled graduates.
 - Conduct a survey of employers to determine what targeted sector and industry certification and programs they would support.
 - Work with area business schools to enhance entrepreneurial curriculum.
 - Periodically evaluate programs to be responsive to the changing job market.

- Provide an adequate supply of commercial and industrial sites to support new and expanding firms wishing to locate or expand in the Augusta area.
 - Develop an infrastructure plan with a focus on the needs of sectors and industries in target clusters.
 - Regularly benchmark local development review processes against competitor regions with similar target sectors and industries.
 - Participate in the capital improvement plan process to lobby for economic development projects.
 - Develop well-planned clustered employment centers in existing areas and downtown.
 - Prepare a market analysis of available infill sites.
 - Target financial incentives to encourage the revitalization and utilization of historic and older commercial and industrial districts for redevelopment.
 - Designate the necessary acreage of vacant prime industrial land for a 20-year planning period.
 - Update inventories of industrial lands at least every ten years to reestablish the 20-year supply of industrial lands.
 - Develop industrial land banking system for large sites to preserve large parcels at key locations for future industrial sites.
- Market and promote target sectors and industries.
 - Market the Augusta area's sizable skilled labor force as an economic development advantage for new and expanding businesses.
 - Centralize website information on development statistics, demographics, local trends, employment statistics, and other data meaningful to developers and site locators.
 - Communicate regularly with key stakeholders and the general public regarding economic development issues, progress and impact.

The CSRA's economy underwent economic changes similar to other regions of the nation. For the urbanized area, this included the rapid rise of high technology jobs and the support services that sustain this industry. For rural CSRA areas, the changes resulted in declining manufacturing activity and the growth of the services sector. Industry growth is key in maintaining the CSRA's economic vitality and competitiveness over time. The loss of manufacturing jobs has hurt the region. These jobs require specific skill sets and are among better paying employment opportunities. In addition, the loss of manufacturing jobs creates negative ripple effects in related sectors.

As the CSRA's economic base shifted, the nature of the businesses also changed. The backbone of area economies has long been the presence of a number of very large employers – both in the productions and service sectors. However, in the last 15 years, the number of large employers has diminished, and the importance of small businesses has grown.

In today's economy, economic development – particularly diversification - is a necessary and critical undertaking. A healthy and relative independence of sectors can ensure that a downturn in any area does not necessarily mean a downturn in the whole economy. Entering new markets and sectors is crucial for future growth and survival of any locality. The challenge of economic development is to distinguish between issues that can be improved and changed and issues which are outside the capability of local areas. Resources can then be focused on those areas within local capabilities and capacities. Therefore, the success of any long-term strategy is dependent on:

- Understanding the risks, capabilities and opportunities involved in a particular economic development strategy.
- Being able to promote and build on the strengths.
- Knowing when to overcome a weakness and when to live with it.
- Recognizing opportunities and embracing them.

5.1 ISSUES IN ECONOMIC DEVELOPMENT

NATIONAL AND GLOBAL INTEGRATION

Several ongoing trends have resulted in changes to the way economies function, both nationally and internationally. These include:

- *Increasingly Global Markets:* The world economy is becoming more integrated and the CSRA has become less immune from national and global economic events. Economic development policy must therefore consider national and international economic factors for many of the region's key employers.
- *Rapidly Advancing Technological Innovation:* Technological innovation is enhancing productivity and changing the way goods and services are produced. Encouraging continued growth in productivity (including new investment and a focus on work force preparedness) is key to study area economies ability to compete.

Combined, these trends, often referred to GCT (globalization, convergence and technology), are fundamentally reshaping the nature of local and regional economies. Relationships between businesses are changing – customers are now able to search worldwide for specialized products or services. Convergence is dissolving the boundaries that traditionally kept industries apart, and is redefining many industries and markets. Knowledge and expertise are now as important as business, capital and plant assets.

REGIONAL ECONOMIC CHALLENGES

The CSRA faces several economic development challenges in the coming decades, including infrastructure needs, declining municipal revenues and needed downtown revitalization. Cities and counties throughout the region have experienced a decline in revenues due to changes in federal and state revenue distribution policies. Furthermore, more and more federal and state mandates are either under-funded or not funded at all, thereby increasing local government financial burdens. At the same time, residential development has consumed large amounts of municipal services and tax funds, much more than it contributed to the revenue stream. Commercial and industrial users, on the other hand, have paid more in taxes than they have consumed in county services.

Evolving federal economic development policy is also changing. Since the 1970s, the federal government has withdrawn much of its state and local funding for local economic development initiatives. Local governments are on their own to a much greater extent than they have been in the past and are forced to take active roles in sustaining and stimulating job creation in a complex and interdependent global economy. CSRA jurisdictions have tasked their respective development authorities and chambers of commerce with this workload. These agencies have strived to support and retain the economic base that they have and broaden economic activities to reduce the vulnerabilities to global influences that can occur in any one of their primary economic activities.

Compounding these regional issues is that metropolitan areas such as Augusta support localities far beyond the metropolitan areas. There are 13 counties (11 of them rural) in the CSRA that all depend on the well-being of the Augusta economy. Historically, the rural CSRA localities pursued an undifferentiated, low-cost, commodity producing strategy instead of a value-added niche strategy. The rural CSRA is now faced with fierce global competition forcing companies to cut costs by substituting capital for labor to generate productivity improvements. Unskilled and semi-skilled labor has been hit hard by competition from low wage jurisdictions.

Rural CSRA communities have responded with their own industrial attraction programs, but it is unclear whether the strategy will be successful. Industrial attraction efforts have been stymied by the downturn in the national economy, the increasing relocation of manufacturing overseas, and a decline in relocation activity among prospective firms. Companies that have relocated to Augusta are lured by the facilities and incentives available from their development authorities, which are beyond the means of rural communities. CSRA communities are not alone in this situation, as numerous localities in Georgia with newly constructed industrial parks have been unable to attract tenants.

5.2 GOALS AND ACTION STRATEGIES

The following CEDS Plan goals and action strategies were developed within the framework of specific sectors and industry areas, which include:

- Niche and value-added manufacturing
- Warehousing and distribution related industries
- Business services and information technology
- Tourism
- Retiree attraction
- Downtown development

NICHE MANUFACTURING

The CSRA has a long, rich heritage in manufacturing, and continues to have a significant proportion of the work force employed in this sector, particularly when compared to the state and the national averages. Traditional industries in chemical products and precision manufacturing will continue to be an important part of the economy for years to come. Many CSRA manufacturing firms represent high-wage, high-skill, and high-output jobs—jobs that in many cases are better described as hi-tech as anything else. Advanced manufacturing processes, involving computer controlled processes, tight logistical planning, and specialized technical and engineering focus, is the hallmark of many study CSRA employers.

Although manufacturing is a primary employment sector, there have been plant closures, layoffs, and job losses by larger manufacturers. While CSRA manufacturers will continue to face challenges to maintain their position in the national and global economy, there are opportunities in niche market segments.

Many innovative communities and businesses are creating additional manufacturing jobs by using rather than exporting raw materials as intermediary inputs. This process, known as value-added manufacturing, is already occurring within the CSRA. Golf cart manufacturers, for example, use otherwise exportable aluminum and steel to develop golf carts. Existing firms have created both a skilled work force as well as network of suppliers and business relationships that will attract and foster the growth of these sub-sectors.

CSRA jurisdictions can further value added manufacturing by profiting from existing forestry products that are currently exported to other markets. Rural CSRA jurisdictions are among the highest forestry producing regions in the southeast but very few furniture manufacturers are located in the region. Manufacturing better products rather than more products, increasing the production of local by-products and improving the quality of products would generate more local jobs and spending, spur exports, and potentially reduce the need to import goods-producing materials from other areas.

Niche manufacturing is centered on developing customized products. Examples include windows with specific architectural standards, parts for limited edition autos, etc. The CSRA is ideally placed for this type of activity because of its accessible transportation system and proximity to major metropolitan areas in the southeast. In addition, these types of services provide positive spillovers because of their demand for supporting staff, specialized software applications, and strategic and business consulting services.

Niche manufacturing operations also tend to be smaller in scale and generally do not require significant land acreage. Existing vacant plants and properties could be improved and redeveloped in locations within the CSRA's cities and nearby unincorporated areas. This would help introduce new employment activities and help stabilize neighborhood conditions as well. Designated areas for this type of manufacturing would therefore include existing industrial parks and downtown area sites.

A focus on value-added and niche manufacturing is not easy for economies without the necessary skill level. However, there are other places to learn from that have managed to develop this manufacturing subsector. Atlanta, with relatively few business and technology-focused colleges for a city of its size two decades ago, underwent a dramatic transformation from a largely low-cost manufacturing economy to a service, pharmaceutical and information technology economy. Recruitment of highly skilled manufacturing to the CSRA can be achieved by ensuring a quality workforce to fill industry needs. Area technical colleges, with substantial experience in preparing skilled graduates, and the Quick Start program are ideal for this activity.

Goal: Target industrial recruitment which enhances job creation with a focus on value-added and niche manufacturing.

Action 1: Pursue both mid-size and large regional industrial parks.

Action 2: Target financial resources to value-added and niche manufacturing.

Action 3: Enhance labor force skills by guiding technical and occupational training in cooperation with technical schools and area colleges.

Action 4: Survey hi-tech and niche manufacturers about skills needs.

Action 5: Promote designated areas in or near CSRA cities for niche and value added manufacturing.

Performance Measure 1: The number of new niche and value added jobs.

Performance Measure 2: The number of new niche manufacturers located in or in proximity to established employment clusters.

Performance Measure 3: Satisfaction rates of labor force by value-added and niche manufacturers.

WAREHOUSING AND DISTRIBUTION RELATED INDUSTRIES

Augusta is recognized as a mid-regional center for distribution industries. Located in close proximity, rural CSRA jurisdictions are ideally placed to develop as transportation distribution hubs. Within a 240-mile radius, there is a market of over 25 million consumers. In addition, with major four-lane highways and low levels of congestion, rural CSRA areas are competitively placed to attract and sustain this industry.

Policy: Encourage growth of warehousing and distribution industries within existing industrial parks and new locations along major highways.

Action 1: Assemble large acre parcels to promote warehousing and distribution.

Action 2: Adapt existing industrial parks to meet warehousing and distribution specifications.

Action 3: Use federal and state transportation funds strategically to make improvements to support warehousing and distribution.

Performance Measure 1: The number of warehousing and distribution industry jobs.

Performance Measure 2: The number of warehousing and distribution industries benefiting from road and highway improvements.

BUSINESS SERVICES AND INFORMATION TECHNOLOGY

Industries such as health, business, and financial services currently provide a good share of the CSRA's employment and will continue to provide an increasing number of well paid jobs in the future. Hospitals and business service providers have shown steady employment growth in the past few years. Information technology will also play an increasingly important role as automation becomes an integral part of many jobs within these industries.

Because of the expansion of hi-tech and the higher paying jobs associated with the industry, advanced-technology firms can potentially create new jobs while increasing wealth. High-tech businesses are sources of ideas and innovations that increase the likelihood of new business

start-ups. This should also make the CSRA a real competitor for small operations whose site requirements may not be as important as larger businesses.

Office uses will continue to serve a support role for the region's economies. The market for office uses in the CSRA will primarily be for small business and professional service firms. Current demand has been met mostly by storefront space in combination with retail/residential uses.

Goal: Encourage the growth of business services and information technology.

Action 1: Promote the CSRA's low business costs to recruiters.

Action 2: Conduct thorough inventory of available office space.

Action 3: Coordinate with technical and four-year colleges to respond to increase in business services and information technology employment.

Performance Measure 1: The number of business services and information technology jobs.

TOURISM

Tourism is a major industry in Georgia but relatively small in the CSRA when compared to other historic southern communities. Tourism is an important sector because it is still underdeveloped with high growth potential. The CSRA has an established cultural tourism industry, with numerous events, visual performance arts and culture. The region's location – in between Atlanta and Charlotte - also provides great potential as a gateway community to travelers from the southeast and throughout the nation.

It is true that most tourism-related jobs are low paying jobs, but it is also true that these are the kinds of jobs that are appropriate for the skill level of some segments of the CSRA's labor force (including students and low-skilled residents). They are better alternatives than no jobs at all which very likely would be the case were it not for the area's tourism industry.

Goal: Expand the CSRA's tourism economy.

Action 1: Support tourism-oriented projects such as enhancement projects.

Action 2: Target funding to support programs and festivals which attract visitors.

Action 3: Develop rural historic sites for educational, recreational, and tourism related activities. This may involve property acquisition of sites.

Performance Measure 1: The number of visitors annually.

Performance Measure 2: Levels of grant funding for enhancement projects.

DOWNTOWN DEVELOPMENT

Downtown districts throughout the CSRA are one of the region's most important assets. Their historic charm and pedestrian friendly design makes them desirable areas for economic development. The districts are also easily accessible and centrally located, serving as activity centers for the residents as well as visitors. These downtowns have great potential as centers for entertainment, culture, and office-based business development.

Master planning is needed for the CSRA's downtowns to focus on economic development. Setting aside land uses for the type of economic growth activities recommended on this Plan should go hand in hand with planning for public investments and institutional uses.

The presence of so many small businesses in the CSRA's downtowns illustrates their importance to the overall economic health of these communities. Considerable potential for small business growth exists in encouraging business start-ups and enabling them to expand. Businesses that employ residents, use local materials, and sell local products are a key component of economic growth. CSRA jurisdictions should continue efforts to provide land use designations that provide small businesses opportunities to start and grow. Although local assistance to help finance private business start-ups and expansion is limited, several state and some federal financing programs (i.e. tax credits, SBA loans, etc.) are available.

Goal: Develop downtowns as a primary residential, office, tourist and retail destinations.

Action 1: Develop economic development-focused master plans as part of the comprehensive planning process.

Action 2: Explore Business Improvement Districts.

Action 3: Locate future tourist venues in or near the downtown areas.

Action 4: Market city and state funding programs to small businesses.

Action 5: Redevelop vacant properties with the use of grants and tax credits.

Action 6: Expand existing downtown festivals and special events.

Performance Measure 1: The number of new residents annually.

Performance Measure 2: The number of tourists annually.

Performance Measure 3: The amount of retail sales annually.

5.3 BUSINESS RETENTION AND EXPANSION

Providing support for existing businesses is an important component of sustaining jobs. Existing businesses provide over two-thirds of new jobs in the CSRA. Encouraging and nurturing these businesses is the key to a stable economic base and the long-term viability.

Goal: Retain and expand existing businesses.

Action 1: Focus business expansion and job retention programs on targeted sectors and industries.

Action 2: Monitor trends, issues and opportunities involving key sectors and industries.

Action 3: Assist with targeted sector and industry retention/expansion business plans.

Action 4: Host regular meetings with employers to discuss current operations and expansion plans.

Action 5: Preserve Fort Gordon's operating environment by implementing the Joint Land Use Plan and utilizing appropriate land use tools to prevent encroachment.

Performance Measure 1: The number of retained and expanded targeted businesses.

Performance Measure 2: The number of assisted industries with expansion plans.

Performance Measure 3: The number of meetings with major employers held annually.

5.4 THE CLUSTER APPROACH

There is a new emerging economy that is entrepreneurial, knowledge intensive and niche-based. The growth and development of significant industry clusters can serve as the basis to capitalize on the new emerging economy.

Business clusters center on a strategy that builds upon the natural economic linkages between sectors. Simultaneous development of sectors creates a more optimal outcome than if those sectors developed separately and without linked approaches. Focusing economic development on clusters can facilitate information exchange and build stronger ties among firms within clusters. By promoting stronger ties among businesses, companies can realize benefits such as lower operating costs, integrated products, shared transportation expenses, more efficient production, and increased access to a specialized workforce.

DESIGNING AND IMPLEMENTING CLUSTER-BASED APPROACHES

In *Cluster-Based Economic Development: A Key to Regional Competitiveness (1997)*, the U.S. Economic Development Administration identifies five overall imperatives for any successful cluster-focused effort:

- 1) Recruit highly committed leadership.
- 2) Develop a strategy to ensure adequate resources throughout the process.
- 3) Choose the right geographic level of focus.
- 4) Find tools to sustain momentum between stages.
- 5) Engage potential implementing institutions from the earliest stages of the process.

Cluster implementation centers of four mutually reinforcing principles:

- Proving collective service delivery (i.e., cluster-wide entrepreneurial support, one-stop shops, joint lobbying)
- Targeting funding and investment to clusters (i.e. cluster-based infrastructure, multi-firm public funding options)
- Coordinate networking among cluster businesses (i.e. workshops and conferences)
- Adapt workforce to cluster environment (i.e. specialized skills centers, cluster-college training agreements)

A good example of the successful implementation of the cluster-based approach is in Augusta, where area workforce adaptation to business clusters is seen in the biomedical cluster. Here, some technical and four-college enrollment is driven by the cluster. Augusta Tech, Augusta State University and the Medical College of Georgia have adapted curricula collaboratively with cluster firms and allowed the demand and supply to be driven by businesses. Skills have become more specialized, resulting in high rates of employment for graduates. The curricula also emphasize industry-led instruction, resulting in colleges operating as continually learning knowledge networks.

Goal: Develop and nurture industry clusters for targeted sectors and industries.

Action 1: Promote business assistance programs that support the cluster approach.

Action 2: Develop small-scale incubator facilities where entrepreneurs can grow their businesses and receive specialized assistance during the early phases of their operations.

Action 3: Refine the locational and supportive requirements for each cluster.

Action 4: Tap into the technical and professional training capabilities of area colleges in those areas supporting targeted sectors and industries.

Performance Measure 1: Growth of business clusters firms and employees.

5.5 INSTITUTIONAL CAPACITY

Business support needs often fit into several broad categories: property selection and development, workforce procurement and training, infrastructure improvements, facility modernization, and financial support. Institutional capacity is a major determinant of successful job creation. Without the skill and knowledge base of economic development organizations, economic initiatives will not succeed.

COORDINATED APPROACH

For institutional support, critical organizations are local governments, development authorities and chambers of commerce. These agencies have clearly delineate roles and responsibilities for various economic development functions (i.e., downtown revitalization, industrial park development, business retention, marketing, administration of grants/loans) that create focused, efficient and effective delivery of economic development services.

Economic development initiatives efforts depend, in large part, on the support of the local governments to carry out planning policies. Local governments play a key role in providing leadership to ensure that economic development plans and policies of other organizations working to strengthen the economy are coordinated, implemented, and monitored.

A coordinated and cooperative approach to economic development initiatives should be institutionalized in the planning process. It is important to use the skills and abilities of participating partners internally within economic development agencies and externally in the community. Local governments have numerous untapped resources, which for the most part are dissipated in many directions. The challenge is to harness this interest and energy, focus it in a common direction and use it to drive economic development initiatives.

STRATEGIC ALLIANCES

Most CSRA jurisdictions lack any formal strategic alliances with other regions throughout the state. These relationships would allow CSRA communities to tap into an economic development knowledge base that would assist in business recruitment and retention.

Goal: Strengthen institutional capacity geared towards targeted sectors and industries.

Action 1: Ensure that local policies, regulations, and decision-making processes consider impacts on economic development efforts.

Action 2: Conduct training sessions for public officials and staff on economic development to educate individuals regarding private sector perspectives of land development.

Action 3: Coordinate among economic development partners to address economic development issues and opportunities and minimize duplication of effort efficiently and effectively.

Action 4: Develop partnering relationships with other regions throughout the nation to build economic development coalitions.

Action 5: Provide training for local development authority board members.

Performance Measure 1: The number of training sessions conducted.

Performance Measure 2: The number of meetings among economic development officials.

Performance Measure 3: The number of economic development partnerships.

Performance Measure 4: The number of trainings offered to development authority board members.

5.6 EDUCATION AND WORKFORCE DEVELOPMENT

The development of job skills needed by the current and future workforce must be a constant priority for schools and businesses. As technology advances, business and industry continue to experience a shift in needed employee skills. The information age has produced a shift from production skills to information-processing and problem-solving skills. Most new jobs demand an ability to adjust to forces requiring continual changes in products, processes, and management structures. Schools and business colleges should examine their effectiveness in producing entrepreneurs and managers capable of competing in the global economy.

Sustained long-run economic growth requires technological transformation and structural change. The leading technology regions are investing heavily in programs to enable the workforce to learn and re-learn competencies and skills required in that dynamic economic world. In addition, an unprecedented requirement for adult retraining and continuous adult learning to keep pace with the changing needs of business and industry is now present. Low and semi-skilled workers can no longer command the wages they once did as a result of global competition and labor cost pressures. Given the number of manufacturing jobs lost in the last decade, workforce training is a necessary element to assist with worker transitions as well as offering a diverse labor pool for businesses.

Goal: Build upon the existing education and workforce training that focuses on targeted sectors.

Action 1: Support cooperative efforts to coordinate education and job training programs among the school boards, technical and comprehensive colleges, and state workforce programs.

Action 2: Encourage linkages between area colleges and employers that feature quality employment opportunities to retain skilled graduates.

Action 3: Conduct a survey of employers to determine what targeted sector and industry certification and programs they would support.

Action 4: Work with area business schools to enhance entrepreneurial curriculum.

Action 5: Periodically evaluate programs to be responsive to the changing job market.

Performance Measure 1: Educational attainment of resident population.

Performance Measure 2: Performance of K-12 systems.

Performance Measure 3: The number of entrepreneurial courses at business schools.

5.7 LAND USE AND INFRASTRUCTURE

Land is a basic requirement for commercial and industrial activity. CSRA jurisdictions encourage economic growth in locations suited for those uses based upon available public facilities, land capability and an orderly development pattern. Economic growth in the industrial sector is dependent on, among other factors, the availability of lands that are suitable for industrial use, served by required urban services, and of adequate size for business expansion or the location of new industries.

Traditionally, infrastructure for economic development was thought to revolve around water and sewer projects. Since industrial recruitment formed the core economic development strategy, this made sense. As the economy has shifted to a more service-based focus, infrastructure requirements have changed. Broadband internet is critical for the economic health of any community. Many CSRA communities lack the proper broadband capacity to be successful in attracting targeted sectors. While incorporated areas are often serviced by an ISP provider, there is usually a monopoly that renders the service cost prohibitive. In the unincorporated areas, there is very little broadband coverage.

DEVELOPMENT PATTERNS

Redevelopment of abandoned or underutilized sites where infrastructure and services are readily available provides a wider range of opportunities for business location. Older commercial and industrial districts offer great potential as alternative venues to more suburban locations for economic growth. The downtown business districts are good examples of venues with such potential. By limiting new development through the extension of infrastructure, existing underdeveloped properties can be appropriately repaired and utilized.

Many of these locations are in the heart of impoverished neighborhoods that have many underutilized, older commercial and industrial buildings. Redevelopment provides the opportunity for nearby job-training and employment to those in the neediest areas, adds tax revenues to municipalities, and stimulate other revitalization efforts.

In addition to vacant and underutilized sites that are suitable for redevelopment, rehabilitation of historic or older buildings is another option for business location. The CSRA contains a significant number of unique historic structures that provide an ideal location for small businesses. Smaller spaces, lower costs, and central location all contribute to attracting and retaining small businesses. By maintaining an inventory of older buildings, cities and downtown development authorities can assist potential businesses to identify structures that meet their needs.

It is clear that existing revenue streams are not sufficient to keep up with demand for public services and facilities. In the past, CSRA jurisdictions dispersed their capital improvement expenditures throughout their areas strategically, thereby avoiding the problem of providing

partial solutions to multiple areas. Given the limited resources available for infrastructure, local governments have to continue their adopted strategic approaches to investment of public funds.

The resurgence of compact, self-sufficient neighborhoods where people meet their lifestyle needs has created a renewed interest in mixed-use development. The economics of mixed-use derive from the notion that mutually supporting activities have a synergistic effect on each other. If housing and office uses are combined, for example, a market is created for shops and services that could not be supported by either alone. In addition, combining these activities in a more compact and focused growth environment, provides additional land for economic growth within an area.

Mixed-use development can fill an important market niche. At a smaller scale, mixed-use provides a way to introduce commercial and office use into residential areas. Within mixed-use centers, the possibility exists for business owners to occupy living space above their business establishments. The concept can be used as to support infill projects in existing areas and as magnet projects to stimulate neighborhood development.

Goal: Provide an adequate supply of commercial sites to support new and expanding firms wishing to locate or expand.

Action 1: Develop an infrastructure plan with a focus on the needs of target sectors.

Action 2: Participate in the capital improvement plan process to lobby for economic development projects.

Action 3: Promote enhanced infrastructure that is suitable for attracting industry.

Action 4: Educate community leaders on the need for suitable infrastructure for job creation.

Action 5: Apply for state and federal infrastructure grants – particularly for broadband, water & sewer projects.

Action 6: Support local revenue generating policies, such as SPLOST, to help fund infrastructure improvements.

Action 7: Encourage regional infrastructure sharing between counties.

Action 8: Develop well-planned clustered employment centers in existing areas and downtowns.

Action 9: Prepare a market analysis of available infill sites.

Action 10: Target financial incentives to encourage the revitalization and utilization of historic and older commercial and industrial districts for redevelopment.

Action 11: Designate the necessary acreage of vacant commercial land for a 20-year planning period.

Action 12: Update inventories of commercial lands and properties at least every ten years.

Action 13: Increase the number and quality of affordable housing units by developing action plans, and partnering with developers.

Action 14: Support the construction and expansion of roadways projects such as I-20, I-520, GA 17, Fall Line Freeway and the Savannah River Parkway.

Action 15: Support regional transportation funding.

Action 16: Expand capacity and runway lengths of CSRA airports.

Performance Measure 1: Funds targeted for revitalization efforts.

Performance Measure 2: Designated commercial acreage in future comprehensive plans.

Performance Measure 3: Amount of state and federal infrastructure funds obtained in the CSRA.

Performance Measure 4: Amount of local revenue generating funds targeted to economic development projects.

Performance Measure 5: The number of quality affordable housing units.

Performance Measure 6: Amount of regional transportation funding.

5.8 MARKETING AND PROMOTION

There are a number of techniques CSRA jurisdictions can use to market and promote targeted industries. These include:

PRINT ADVERTISING

Print advertising typically has two objectives: (1) increase awareness as a business location, and (2) generate inquiries. Advertising in economic development magazines is the overwhelming favorite among economic developers. Targeting ads directly to new facility decision makers is important to avoid the message getting lost.

TRADE SHOWS

Trade shows are a very cost-effective way of generating a high number of development leads. These are typically coordinated with state agencies. Economic development organizations can attend key trade shows. Trade shows provide an opportunity to contact a large concentration of prospects for target sectors and industries.

BUSINESS MISSIONS OR PROSPECTING TRIPS

These are trips outside the area, focusing on a source area for economic development leads. To keep travel costs down, missions are often held in conjunction with trade shows, or with the state development groups.

EVENTS

Events are a way to communicate to a broad audience. They are most useful for retention purposes, but can also serve as effective attraction techniques. Events generally include new business receptions, awards for existing businesses, and executive tours for industrial prospects and key site consultants.

PUBLIC RELATIONS

Many communities use public relations as a central component of their economic development strategy. Public relations include news releases, articles about CSRA economies, success stories in magazines, newspapers, and other media. Press coverage adds credibility and name-recognition, encouraging targeted industries to respond. Public service announcements are typically released for new company recruitment, funding, survey and study results, and accomplishments of agency staff.

WEB SITES

Most communities have their own web site with clear links to data useful to corporate site selectors and their consultants. This means including community profiles in addition to in-depth facts such as economic profiles, data books, site and building inventories, infrastructure, business climate factors, and industry profiles. Including such data requires coordination among different stakeholders. This is particularly true for buildings and sites. The major area real estate companies maintain excellent databases of all existing inventory, trends in the market, costs and usually historical information on sites or buildings.

Presently, no website exists to provide centralized information for the entire region. The development authority and chamber of commerce websites are the most detailed but other economic development organizations maintain their own data and information.

SITE VISITS / TOURS

Prospect visits are very important in the decision making process. They provide the opportunity to show firsthand what an area has to offer. Many prospects lack a perception of the areas they are considering. Site visits provide prospects a chance to evaluate a region's strengths, weaknesses and potential for its future. Site visits typically include meetings with economic development leaders, discussion of permitting process and general economic trends.

Goal: Market and promote target sectors and industries.

Action 1: Enhance the marketing capabilities of each CSRA county to attract new industry and employment opportunities.

Action 2: Market the CSRA's available labor force as an economic development advantage for new and expanding businesses.

Action 3: Centralize website information on development statistics, demographics, local trends, employment statistics, industrial lands and buildings inventories, and other data meaningful to developers and site locators.

Action 4: Communicate regularly with key stakeholders and the general public regarding economic development issues, progress and impact.

Action 5: Educate local companies about financial and business development resources available from government sources.

Performance Measure 1: The number of press articles, print advertisements, trade shows, direct mail, and business mission trips annually.

Performance Measure 2: The number of website hits annually.

Performance Measure 3: Number of information packets on available government financial and business resources.

5.9 IMPLEMENTATION

For economic development strategies to succeed, it is necessary to be realistic about the strengths, weaknesses, opportunities and threats. There is considerable energy in the CSRA to make things happen – smart people, unique economic specialty areas, counter-cyclical business activity that provides a stable base – and to sustain a vibrant, dynamic and diversified regional economy.

COLLABORATIVE APPROACH

It is not until all of the above-mentioned factors are combined and integrated that the CSRA will achieve its economic development vision. A focus on integrated education, entrepreneurship, and enhancement of existing sectors and industries, can drive the regional economy to success. For this strategy to succeed, each key entity involved in the implementation of the strategy must have clear accountabilities for implementing the strategy and the capacity to commit the resources required.

The primary form of implementation will be through an increased level of co-operation between the partners and relevant agencies. The objective is that a greater understanding of activities and areas of expertise can be learned and drawn upon to respond to situations as they arise. The form that these initiatives take will vary according to individual requirements, but specific projects, joint approaches for funding, and collaboration on recruiting are just a few of elements which come to the fore.

PERFORMANCE MONITORING

Economic development stakeholders will monitor and ensure the implementation of the CEDS Plan, undertaking periodic reviews, identifying appropriate modifications required in the strategy content and/or implementation mechanisms, and reporting back to all interested parties. This enables stakeholders to monitor progress toward meeting economic development goals.

These actions will be carried out in recognition that the CEDS Plan must be flexible and that changes may have to be made for a variety of reasons, including:

- Responding to changes in the CSRA's economies.
- Responding to consultation with other organizations.
- The effectiveness of the partners' overall objectives and activities.

Benchmarks are a way to measure and evaluate progress toward economic development goals. The preceding section contains a list of performance measures that will be used to assess the success and progress of the economic development action strategies.

Table A-1 details an action plan work program detailing specific actions needed to meet the economic development vision.

Table A-1: Action Plan Work Program			
Activity		Implementation Timeline*	Responsible Party
TOPIC: TARGETED SECTORS (MANUFACTURING)			
Goal: Target business recruitment which enhances economic development with a focus on value-added and niche manufacturing.			
A.	Develop mid-size and large regional industrial parks	Ongoing	City/county governments; Development Authorities
B.	Target available financial resources to value-added and niche manufacturing.	Ongoing	City/county governments; Development Authorities
C.	Enhance labor force skills by guiding technical and occupational training in cooperation with technical schools and area colleges.	Ongoing	Development Authorities; area colleges
D.	Survey hi-tech and niche manufacturers about skills needs.	Ongoing	Development Authorities
E.	Promote designated areas in or near cities for niche and value added manufacturing.	Ongoing	Development Authorities
TOPIC: TARGETED SECTORS (WAREHOUSING AND DISTRIBUTION)			
Goal: Encourage growth of warehousing and distribution industries within existing industrial parks and new locations along major highways and interstates.			
A.	Assemble large acre parcels to promote warehousing and distribution.	Ongoing	City/county governments; Development Authorities
B.	Adapt existing industrial parks to meet warehousing and distribution specifications.	Ongoing	City/county governments; Development Authorities
C.	Use federal/state transportation funds strategically to promote warehousing and distribution.	Ongoing	CSRA RC; City/county governments; Development Authorities
TOPIC: TARGETED SECTORS (BUSINESS SERVICES / INFORMATION TECHNOLOGY)			
Goal: Encourage the growth of business services and information technology.			

Table A-1: Action Plan Work Program			
Activity		Implementation Timeline*	Responsible Party
A.	Promote low business costs to recruiters.	Ongoing	Development Authorities
B.	Conduct thorough inventory of available office space.	Short-Range	City/county governments; Development
C.	Coordinate with technical and four-year colleges to respond to increase in business services and information technology employment.	Ongoing	Development Authorities
TOPIC: TARGETED SECTORS (TOURISM)			
Goal: Expand the region's tourism economy			
A.	Support tourism-oriented projects such as enhancements projects.	Long-Range	Chambers of Commerce; downtown development
B.	Target funding to support the variety of arts programs and festivals which attract visitors.	Ongoing	City/county governments; chamber of commerce; downtown
TOPIC: TARGETED SECTORS (DOWNTOWN DEVELOPMENT)			
Goal: Develop downtown as a primary residential, tourist and retail destination.			
A.	Develop economic development-focused master plans as part of the comprehensive planning process.	Short-Range	CSRA RC; City/county governments; chamber of commerce; development authorities; downtown development
B.	Explore Business Improvement Districts.	Short-Range	Downtown Development
C.	Locate future major tourist venues in or near downtown areas.	Long-Range	Chambers of commerce, downtown development
D.	Market city and state funding programs to small businesses.	Ongoing	City/county governments;

Table A-1: Action Plan Work Program			
Activity		Implementation Timeline*	Responsible Party
			of commerce, downtown
E.	Redevelop vacant properties with the use of grants and tax credits.	Ongoing	CSRA RC; City/county governments; chambers of commerce,
F.	Expand existing downtown festivals and special events.	Ongoing	City/county governments; chambers of commerce,
TOPIC: BUSINESS RETENTION AND EXPANSION			
Goal: Retain and expand existing businesses.			
A.	Focus business expansion and job retention programs on targeted sectors and industries.	Ongoing	Development Authorities; chambers of
B.	Monitor trends, issues and opportunities involving key sectors and industries.	Ongoing	Development Authorities; chambers of
C.	Assist with targeted sector and industry retention/expansion business plans.	Ongoing	Development Authorities; chambers of
D.	Host regular meetings with major employers to discuss current operations and expansion plans.	Ongoing	Development Authorities; chambers of
E.	Preserve Fort Gordon's operating environment	Ongoing	CSRA RC; City and County
TOPIC: BUSINESS CLUSTERS			
Goal: Develop and nurture industry clusters for targeted sectors and industries.			
A.	Promote business assistance programs that support the cluster approach.	Ongoing	Development Authorities; chambers of

Table A-1: Action Plan Work Program			
Activity		Implementation Timeline*	Responsible Party
B.	Develop small-scale incubator facilities where entrepreneurs can grow their businesses and receive specialized assistance during the early phases of their operations.	Ongoing	Development Authorities; chambers of commerce
C.	Refine the location and supportive requirements for each cluster.	Ongoing	Development Authorities; chambers of commerce
D.	Tap into the technical and professional training capabilities of area colleges in those areas supporting targeted sectors and industries	Ongoing	Development Authorities; chambers of commerce
TOPIC: INSTITUTIONAL CAPACITY			
Goal: Strengthen institutional capacity geared towards targeted sectors and industries.			
A.	Ensure that local policies, regulations, and decision-making processes consider impacts on economic planning efforts.	Ongoing	Development Authorities; chambers of commerce
B.	Conduct training sessions for public officials and staff on economic development to educate individuals regarding private sector perspectives of land development.	Ongoing	CSRA RC; Development Authorities; chambers of commerce
C.	Coordinate among economic development partners to address economic development issues and opportunities and minimize duplication of effort efficiently and effectively.	Ongoing	CSRA RC; Development Authorities; chambers of commerce
D.	Develop partnering relationships with other regions throughout the nation to build economic development coalitions.	Ongoing	Development Authorities; chambers of commerce
E.	Provide training for local development authority board members	Ongoing	CSRA RC; Development
TOPIC: EDUCATION AND WORKFORCE DEVELOPMENT			

Table A-1: Action Plan Work Program			
Activity		Implementation Timeline*	Responsible Party
Goal: Build upon the existing education and workforce training that focuses on targeted sectors and industries.			
A.	Support cooperative efforts to coordinate education and job training programs among the school boards, technical and four-year colleges, and state workforce programs.	Ongoing	Development Authorities; chambers of commerce
B.	Encourage linkages between area colleges and employers that feature quality employment opportunities to retain skilled graduates.	Ongoing	Development Authorities; chambers of commerce
C.	Conduct a survey of employers to determine what targeted sector and industry certification and programs they would support.	Ongoing	Development Authorities; chambers of commerce
D.	Work with area business schools to enhance entrepreneurial curriculum.	Ongoing	Development Authorities; chambers of commerce
TOPIC: LAND USE AND INFRASTRUCTURE			
Goal: Provide an adequate supply of commercial and industrial sites to support new and expanding firms wishing to locate or expand in the CSRA area.			
A.	Develop an infrastructure plan with a focus on the needs of sectors and industries in target clusters.	Short-Term	Development Authorities; downtown development authorities; chambers
B.	Participate in the capital improvement plan process.	Ongoing	Development Authorities; downtown development authorities; chambers
C.	Promote enhanced infrastructure to attract industry	Ongoing	CSRA Development Authorities; RC;

Table A-1: Action Plan Work Program

Table A-1: Action Plan Work Program			
Activity		Implementation Timeline*	Responsible Party
			authorities; chambers of commerce
D.	Educate community leaders on suitable infrastructure for job creation	Ongoing	CSRA RC; Development Authorities; downtown development authorities; chambers of commerce
E.	Apply for state and federal infrastructure grants – especially for broadband, water, and sewer projects.	Ongoing	CSRA RC; Development Authorities; downtown development authorities; chambers of commerce
F.	Support local revenue generating policies	Ongoing	CSRA RC; Development Authorities; downtown development authorities; chambers of commerce
G.	Encourage regional infrastructure sharing between counties	Ongoing	CSRA RC; Development Authorities; downtown development authorities; chambers of commerce
H.	Develop well-planned clustered employment centers in or near existing downtowns.	Ongoing	Development Authorities; downtown development authorities; chambers of commerce
I.	Prepare a market analysis of available infill sites.	Short-Term	CSRA RC; Development Authorities; downtown development authorities; chambers of commerce
J.	Target financial incentives to encourage the revitalization and utilization of historic and older commercial districts for redevelopment.	Ongoing	Development Authorities; downtown development

Table A-1: Action Plan Work Program			
Activity		Implementation Timeline*	Responsible Party
			authorities; chambers of commerce
K.	Designate the necessary acreage of vacant commercial land for a 20-year planning period.	Ongoing	Development Authorities; downtown development authorities; chambers of commerce
L.	Update inventories of commercial lands and properties.	Ongoing	CSRA RC; Development Authorities; downtown development authorities; chambers of commerce
M.	Increase the number and quality of affordable housing	Ongoing	CSRA RC; Cities and Counties
N.	Support the construction and expansion of major roadways projects in the region.	Ongoing	CSRA RC; Cities and Counties
O.	Support regional transportation funding	Ongoing	CSRA RC; Cities and Counties
P.	Expand the region's airports.	Ongoing	CSRA RC; Cities and Counties
TOPIC: MARKETING AND PROMOTION			
Goal: Market and promote target sectors and industries.			
A.	Enhance marketing capabilities of CSRA counties.	Ongoing	Development Authorities; downtown development authorities; chambers of commerce
B.	Market the CSRA's available labor force as an economic development advantage for new and expanding businesses.	Ongoing	Development Authorities; downtown development authorities; chambers of commerce

Table A-1: Action Plan Work Program			
Activity		Implementation Timeline*	Responsible Party
C.	Centralize website information on development statistics, demographics, local trends, employment statistics, and other data meaningful to developers and site locators.	Ongoing	CSRA RC; Development Authorities; downtown development
D.	Communicate regularly with key stakeholders and the general public regarding economic development issues, progress and impact.	Ongoing	Development Authorities; downtown development authorities;
E.	Educate local companies about financial and business development resources	Ongoing	Development Authorities; downtown development authorities;

* Short-Range (5 year period) Long-Range (10 year period)

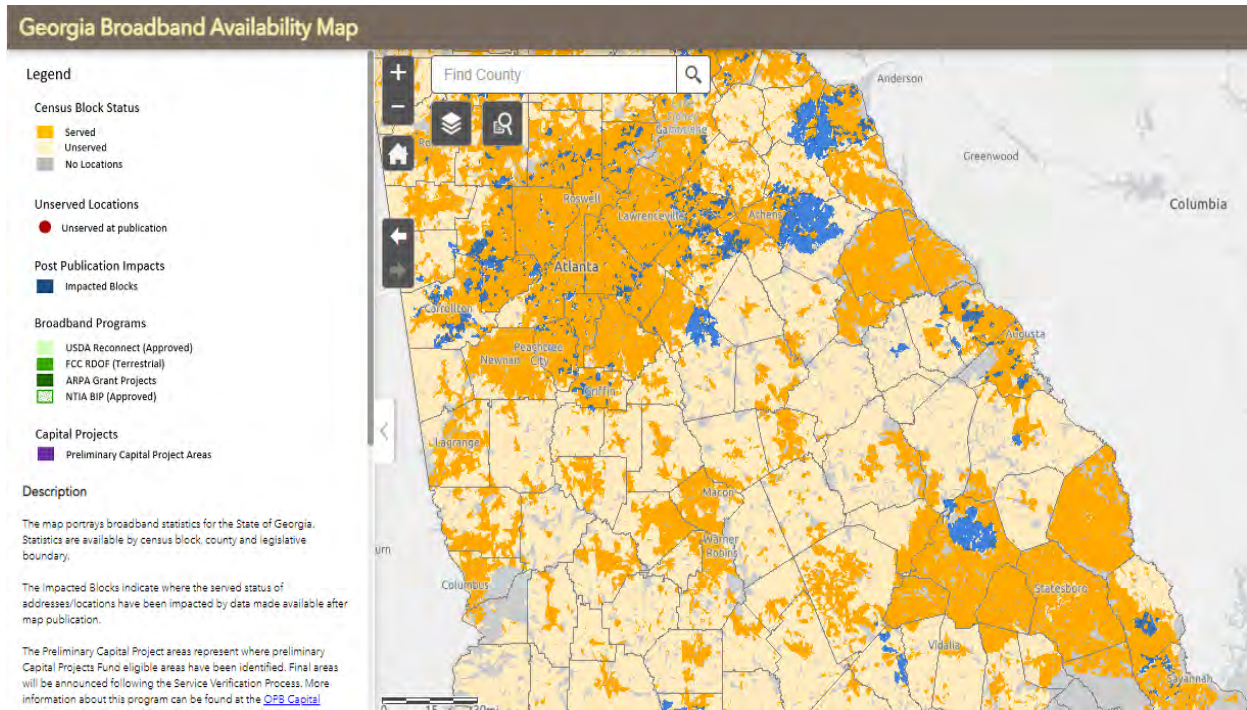
5.10 STRATEGIC PROJECTS

RURAL BROADBAND INFRASTRUCTURE

Broadband has become essential to business, education, healthcare, agriculture, and overall quality of life. Unfortunately, high-speed internet access remains out of reach for many residents of rural Georgia. In 2018, the state launched the Georgia Broadband Program which set a goal of providing broadband services throughout the state to underserved areas with minimum of 25 Mbps download and 3 Mbps upload speeds.

Figure I-1 indicated the locations that are served and unserved by broadband services. There have been numerous grants and projects approved to broadband expansion.

Figure S-1: Georgia Broadband Availability Map, 2022



Source: Georgia Department of Community Affairs, Georgia Broadband Program

REGIONAL PARKS

The development of one to two regional parks is paramount to maximizing resources and promoting the CSRA area. A large tract of land has been identified and preliminary discussions have begun among UDA members. Additionally, the support and development of a mega-site industrial park is a regional priority. The EDD will work with individual counties, cities, the UDA to coordinate the development of these crucial regional parks as well as smaller multi-county endeavors.

DEVELOPMENT OF NEW EXIT OFF 1-20

A new exit west of the City of Thompson presents an opportunity for new development in McDuffie County. Land is readily available at this site, but water and sewer are needed. The development of this exit will create another access point to McDuffie County as well as the area surrounding Clarks Hill Lake.

BROWNFIELD REDEVELOPMENT

Abandoned Brownfield sites once provided economic vitality and jobs to communities and are now avoided by new industry, developers and lenders. Productively reusing Brownfield sites prevents sprawl, encourages revitalization and creates new jobs for the region. Cleaning up, reinvesting in and redeveloping these properties shifts development pressures away from undeveloped land and links economic vitality and jobs with environmental protection. The EDD will work with local governments to identify and seek out funding for potential redevelopment projects. This will include increasing the number of Brownfield Assessment and Cleanup projects and creating a regional revolving loan fund.

MAINTAIN AND CREATE ADEQUATE ROADWAY, WATER AND SEWER INFRASTRUCTURE THROUGHOUT THE REGION

One of the challenges of the region is keeping infrastructure current and maintaining the capacity needed for new businesses. The EDD supports infrastructure improvement projects throughout the region and considers each project essential to creating and retaining jobs. Particularly important are the CSRA's water and sewer projects and widening GA 17 from I-16 and I-85 in order to better serve companies that use the Port of Savannah.

PROMOTE HIGH TECH / BIOTECH INDUSTRY CLUSTERS

Thousands of highly skilled, signal-trained, soldiers end their military service at Ft. Gordon and leave the area in order to find work. National Science Center Foundation and Global Emergency Resources are hoping to draw from that resource by developing a high tech, science-oriented park adjacent to Fort Gordon. The region is now home to Army Cyber Command and all of the spin off industries that relate. In the next planning cycle, the EDD will better be able to set goals and plans related to this rapidly emerging sector.

6.0 ACHIEVEMENTS SINCE FY2018-2023 PLAN

TOPIC: TARGETED SECTORS (MANUFACTURING)

Goal: Target business recruitment which enhances economic development with a focus on value-added and niche manufacturing.

Bank of America recently approved a \$100,000 investment in a new workforce development initiative at Augusta Technical College. This new program is called FAST: Focused, Accelerated Skills Training, which is designed to provide short term training and certification programs to students enrolled in the program. This investment will fund a Manufacturing Fundamentals Bootcamp as well as Forklift and OSHA training. Augusta Technical College is in the process of hiring a Manufacturing Instructor and will market and recruit new students facing underemployment or unemployment because they lack the needed skills local employers require.

Augusta Technical College Grovetown's campus will soon focus on advanced manufacturing. A new 75,000 building will provide training space focusing on manufacturing procedures as well as provide office space for new industries locating to the region. Other building space is earmarked for current industries that need space to perform research, development, and prototyping new products.

Augusta Corporate Park in Richmond has landed a new tenant. Pure Cycle Technologies is making a \$440 million investment and will bring nearly 100 high paying jobs to the site in 2023. Pure Cycle Technologies is a polypropylene recycling company and will be the second manufacturing company to join Augusta Corporate Park.

TOPIC: TARGETED SECTORS (WAREHOUSING AND DISTRIBUTION)

Goal: Encourage growth of warehousing and distribution industries within existing industrial parks and new locations along major highways and interstates.

The White Oak Business Park in Columbia County has doubled in size with the recent purchase of an additional 342 acres. The business park now encompasses 612 acres and has recently landed two large Amazon centers. Amazon opened a 600,000-square-foot distribution center and a 278,000-square-foot sortation center in the business park. These two centers employ nearly 1,000 workers. In addition, an unnamed developer has placed 18 acres under contract at the business park and plans to construct a building of at least 170,000 square feet that would be leased to a new tenant.

Augusta Technical College's McDuffie County is expanding and will concentrate on all aspects of supply chain management. A new truck-driving range on the campus will be designed to help more students earn their commercial driver's license and a new 50,000 square foot

building will be designed to put supply chain theory into practice. This program will enable students to quickly move into the nearby Amazon centers or other warehousing/distribution industries in the region.

TOPIC: TARGETED SECTORS (BUSINESS SERVICES / INFORMATION TECHNOLOGY)
Goal: Encourage the growth of business services and information technology.

Governor Kemp recently announced a collaborative initiative between the state and Amazon Web Services to provide cloud computing training and education to 5,000 learners statewide by 2024. Through this initiative, local high schools and technical colleges will offer cloud computing courses and credentials that align with skills needed to pursue in-demand technical careers. The state of Georgia will work with Amazon to provide educational institutions with no-cost, ready-to-teach, cloud computing curricula that prepares students for industry-recognized certifications and in-demand cloud jobs.

Augusta Technical College is working with local public school districts to explore the idea of establishing “college and career” academies. At these academies, high school students could pursue instruction for technical jobs while earning college credit. These programs would be targeted to careers that are in most demand.

Augusta University and Augusta Technical College have recently formed a partnership to offer a new program that offers a pathway to an information technology degree. This program allows students in Augusta Tech’s Associate of Applied Science in Cybersecurity program to roll directly into Augusta University’s program so students can earn a Bachelor of Science in Information. Cyber students from both schools take classes at the Georgia Cyber Center. As part of the collaborative ecosystem, and onsite internship coordinator work with the students to help them secure internship opportunities with industry partners.

TOPIC: TARGETED SECTORS (TOURISM)			
Goal: Expand the region’s tourism economy			
A	Support tourism-oriented projects such as enhancements projects.	Long-Range	Chambers of Commerce; downtown

McDuffie and Wilkes counties have recently applied for grants that will support tourism projects in the region. One project is along the Little River Water Trail. The plan is to add two access points along the river in McDuffie County. These two proposed sites will provide ADA accessible kayak launches, parking spaces, restrooms and a pavilion that can be used by families, schools, and civic organizations. In Wilkes County, the Kettle Creek Battlefield Association seeks to acquire nearly 180 acres. The plan is to increase add additional monuments, Revolutionary Soldier Grave markers, and hiking/biking trails. Both of these

projects will increase tourism in the area

TOPIC: BUSINESS RETENTION AND EXPANSION

Goal: Retain and expand existing businesses.

The Washington County Development Authority announced the expansion of several businesses in the county. Endurance Poly Producers recently invested nearly \$5 million and hired 21 full-time employees. The company is expected to hire additional workers in the near future. Fowler Flemister Concrete and Mawson Infrastructure Group have also increased operations in Washington County. The Washington County Development Authority announced these three companies have invested a total of \$83 million and created 90 new jobs in the county.

The U.S. Commerce Department recently awarded the city of Waynesboro a \$1.5 million grant for a water well and water treatment facility to accommodate a new dairy processing and packing plant in the Waynesboro-Burke County Industrial Park. This new plant is expected to create nearly 200 jobs in the area.

TOPIC: BUSINESS CLUSTERS

Goal: Develop and nurture industry clusters for targeted sectors and industries.

The Augusta Economic Development Authority received an \$8.5 million grant to connect Fort Gordon personnel and their spouses with area cyber jobs. This project will place about 1,000 transitioning service members, veterans, and military spouses in training for cyber industry certifications that will lead to full-time employment in the area. Partners in the program include the Georgia Cyber Center, the CSRA Alliance for Fort Gordon, the CSRA Regional Commission, WorkSource East Central Georgia, ICF Inc., Augusta University, SofTact Solutions, MOSAIC Technologies Group LLC, and Security Onion Solutions LLC.

TOPIC: EDUCATION AND WORKFORCE DEVELOPMENT

Goal: Build upon the existing education and workforce training that focuses on targeted sectors and industries.

Bank of America recently approved a \$100,000 investment in a new workforce development initiative at Augusta Technical College. This new program is called FAST: Focused, Accelerated Skills Training, which is designed to provide short term training and certification programs to students enrolled in the program. This investment will fund a Manufacturing Fundamentals Bootcamp as well as Forklift and OSHA training. Augusta Technical College is in the process of hiring a Manufacturing Instructor and will market and recruit new students facing underemployment or unemployment because they lack the needed skills local employers require.

TOPIC: LAND USE AND INFRASTRUCTURE

Goal: Provide an adequate supply of commercial and industrial sites to support new and expanding firms wishing to locate or expand in the CSRA area.

Augusta-Richmond County was recently awarded nearly \$3.5 million to address the affordable housing issue. The grant will be used to help lower income families rehabilitate their current home, provide assistance to low-income homebuyers, construct affordable rental housing, and expand tenant-based rental help and to provide additional support to those experiencing eviction or homelessness. In addition, developers are working on three separate housing projects in Augusta that will provide an addition 200 affordable housing units within the next year. Other affordable housing units are currently under development in Columbia County.

TSPLOST

Voters in the 13 counties in the CSRA overwhelmingly voted to renew the one-cent sales tax for another ten years. The 2020 TSPLOST is expected to result in a \$1 billion investment in the CSRA's transportation infrastructure. Since 2011, \$625 million has been collected and 55 projects have been completed in the CSRA. There are currently 16 projects under construction.

COVID Challenges

The economic challenges caused by the COVID-19 pandemic on the CSRA continue to decline. The unemployment rate has fallen from a high of 6.0% in September 2020 to 2.9% in September 2021. While more people are returning to the workforce, employers in the CSRA and across Georgia are still struggling to find workers. As of November 2021, the Georgia Department of Labor's website states there are nearly 190,000 jobs open statewide.

Supply chain issues and inflation are also causing problems in the CSRA. Supply chain disruptions are being further exacerbated by an ongoing truck driver shortage. Because trucks are involved in nearly every link in the supply chain system, the shortage of truck drivers is creating bottlenecks at ports and distribution centers resulting in delays. The demand for goods and services has exceeded the supply and this has resulted in inflation. Rising prices and lack of supplies are all having a detrimental effect on local businesses.

COVID Opportunities

While the COVID-19 pandemic has caused problems for the CSRA, it is also bringing new opportunities and much needed resources into the region. On March 11, 2021, President Biden signed the American Rescue Plan into law. This plan allocated \$3 billion in supplemental funding to assist communities nationwide in their efforts to recover from the pandemic. The State of Georgia is projected to receive at least \$17 billion. This assistance will be spread out to local governments and individuals.

Education: The Georgia Department of Education and the University System of Georgia will receive nearly \$5.6 billion in funding. These funds will be available until September 30, 2023.

Breakdown of Local School Funding in American Rescue Plan for the CSRA:

- Burke County School District: \$14.1 million
- Columbia County School District: \$24.7 million
- Glascock County School District: \$790,000
- Hancock County School District: \$4.9 million
- Jefferson County School District: \$9.4 million
- Jenkins County School District: \$5 million
- Lincoln County School District: \$2.4 million
- McDuffie County School District: \$11.5 million
- Richmond County School District: \$112.4 million
- Taliaferro County School District: \$972,000
- Warren County School District: \$3.6 million
- Washington County School District: \$12.3 million
- Wilkes County School District: \$4.6 million

In addition, colleges and universities in the CSRA will receive nearly \$45 million in funding from the American Rescue Plan.

Breakdown of College and University Funding in the CSRA:

- Augusta Technical College: \$15.7 million, of which \$7.9 million must be used for student grants.
- Augusta University: \$17.6 million, of which \$8.8 million must be used for student grants.
- East Georgia State College: \$9 million, of which \$4.7 million must be used for student grants.
- Paine College: \$2.6 million, of which \$1.3 million must be used for student grants.

Augusta Regional Airport: The Augusta Regional Airport received over \$ 2 million in funding from two grants awarded by the U.S. Department of Transportation. The first award was funded through the Coronavirus Relief and Response Supplemental Appropriations Act, totals \$2.6 million and will provide relief for costs related to operations, personnel, cleaning to combat the spread of pathogens at the airport. The second grant will bring an additional \$70 thousand to the airport. This will provide economic relief for rent and minimum annual guarantees, on air-port car rental, on-airport parking and in-terminal concessions located at the facility.

Additional funds will be available to communities across the CSRA for the following projects:

- Expanding broadband to rural communities
- Improving water, sewer, and storm water systems
- Food banks
- Rural health departments
- Affordable housing