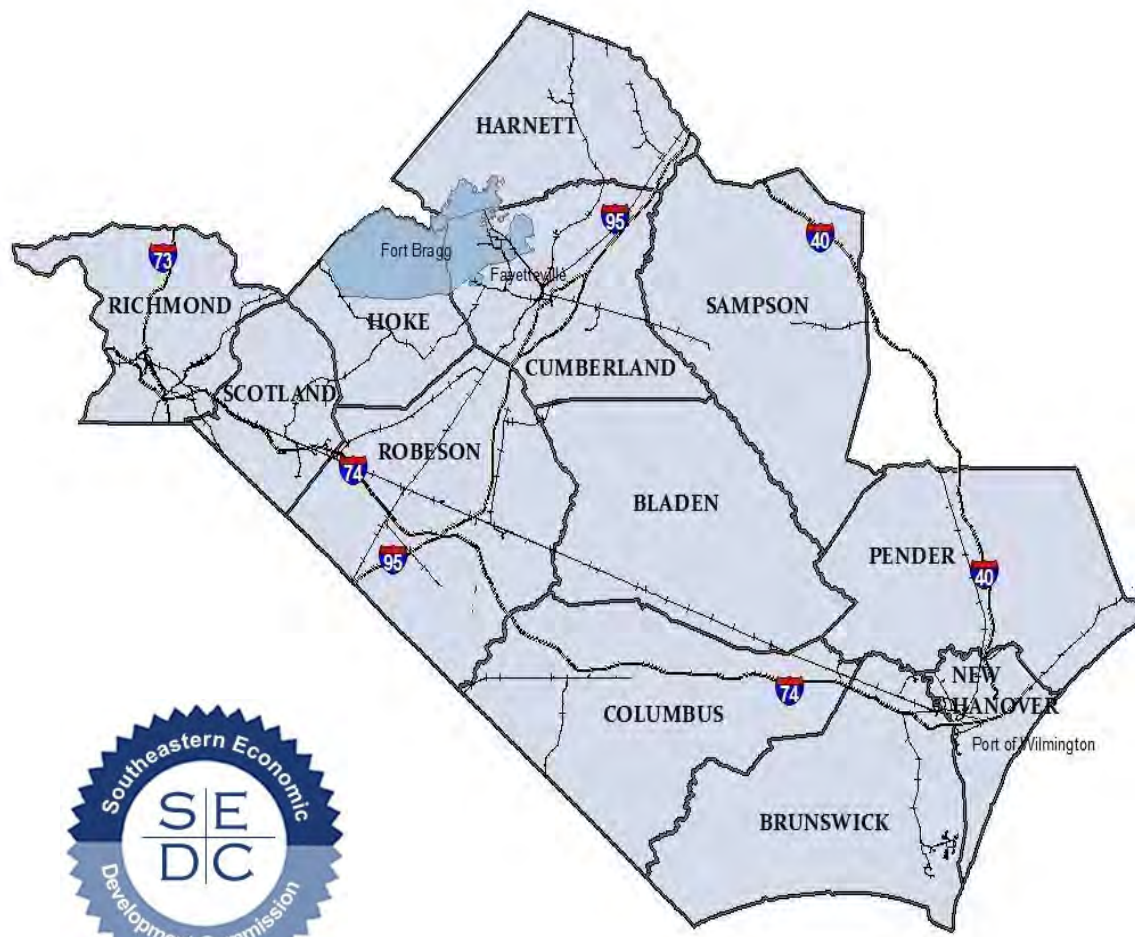


Comprehensive Economic Development Strategy

2012-2017

Southeastern
Economic
Development
Commission

Elizabethtown,
North Carolina
September 2012



ACKNOWLEDGEMENTS

This document was prepared by the Southeastern Economic Development Commission in collaboration with the three regional Councils of Government—Cape Fear Council, Lumber River Council and Mid-Carolina Council—located within the SEDC Region.

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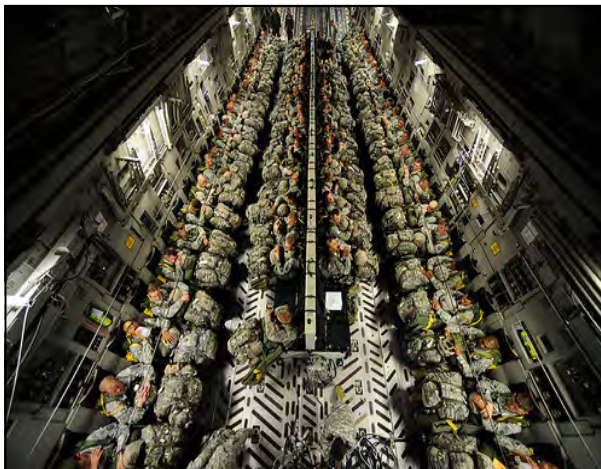
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Above— Map: SEDC Region

Below (left to right): Soldiers await airdrop (Courtesy Fort Bragg Airborne Corp); Container ship, Wheat harvesting, (Courtesy Pub-
licdomainphotos.com).



The **Southeastern Economic Development Commission (SEDC)** Region consists of the twelve counties in the extreme southeastern corner of North Carolina. These counties include Bladen, Brunswick, Columbus, Cumberland, Harnett, Hoke, New Hanover, Pender, Richmond, Robeson, Sampson and Scotland. The westernmost county, Richmond, has joined the SEDC Region since the last Comprehensive Economic Development Strategy was prepared in 2007.

This region is the largest Economic Development District in North Carolina. Its size and geographic location make it a hugely diverse region extending from the coastal plain to the piedmont. The local economies range from the two metropolitan areas—Fayetteville which includes Fort Bragg—and Wilmington on the coast. The counties in between these two designated metro areas are more rural in nature.



Economic Shifts

In the period between 1990 and 2010, this region was decimated by job losses—over 38,000 in manufacturing alone—as a structural shift in the region's economy took place as companies downsized and shifted production offshore to countries with lower wages, and less business and environmental protection regulation. Small towns once dependent on textiles and apparel lost their only major employer and the existing labor force was left with few, if any, options for reemployment at the wage and benefit level of their former jobs.

Simultaneously, the shift toward “knowledge jobs” began in the nation, our State and region. Recognizing this structural shift in the economy, the State and Federal governments stepped in with strategic investments in workforce training programs geared to the adult and dislocated workers. Thousands of dislocated and adult



Executive Summary

workers have received some form of worker training assistance. Many have gone on to secure new jobs in new fields of work and have experienced once again the satisfaction that comes with good work and being able to care for your family. While recruitment efforts for the large-investment/large-employment industries continue, these efforts are coupled with focus on meeting the needs of the existing businesses and on growing our own businesses in the region. Universities and community colleges have responded with programs that assist entrepreneurs bring to fruition their good ideas.

The particularly difficult challenge for our region has been the current recession. Incomes in this region typically lag behind the State average and poverty rates are high. Three counties in the SEDC region have been designated as Persistent Poverty counties as they have experienced poverty rates above 20 percent for three consecu-

tive decades. The SEDC region is also home to the poorest county in the State. Jobs have been slow to return, unemployment is high and many business and industries are reluctant to rehire or to expand without further signals of economic recovery.

Our Economic Clusters

Through our Visioning Meetings and the Online Survey we conducted for this Comprehensive Economic Development effort, we heard from hundreds of folks who recognize these challenges but also have an overwhelming desire to make things work. We have identified eight major clusters of economic development activity which honor the diversity within the region and offer real opportunity for job creation. With community support and continued strategic investments we believe that our economy will grow in Advanced Manufacturing, Agribusiness, Biotechnology, Film, Healthcare, Military De-

fense, Tourism and Transportation and Logistics. This report includes an introduction to each cluster together with recommended objectives and strategies.



Vision for Our Future

Collaboration and partnerships are essential to developing a sustainable economy in our region. The objectives and strategies contained in this report reflect that we see strength in our diversity, understand our asset base and adaptive capabilities. Together these will drive the economic recovery in this region from within and show that “We are Open for Business”.

Photos Left to Right: Arvin Manufacturing (courtesy Scotland County); Biotechnologist (Courtesy Publicdomainphotos.com); and Hydroponic beans, Robeson County farm operation (Courtesy City of Lumberton).



Community and Private Sector Participation

Participants and the Process

The Economic Development Administration's (EDA) Comprehensive Economic Development Strategy (CEDS) process help community leaders examine strengths and obstacles in the region setting forth goals and objectives necessary to solve the economic problems and capitalize on the resources of the region. The CEDS is a twelve-county effort to generate a regional strategy for economic development with the ultimate goal of a stronger, more diverse regional economy. It provides a regional economic development framework, through with federal agencies, such as the EDA, evaluate need for grant assistance. The key to an effective CEDS is an ongoing economic development planning process developed with broad-based and diverse public and private sector participation.

The planning process is led by the Southeastern Economic Development Commission, the Economic Development District designated by the EDA. The CEDS development process was carried out in collaboration with the three Regional Councils of Government in the region. The CEDS Plan will be blended into a statewide plan which will guide investments to support sustainable economic development in North Carolina. The North Carolina Association of Regional Councils is leading the initiative—NC Tomorrow—in collaborative partnership with assistance from the US Economic Development

Administration, North Carolina Department of Commerce—Division of Community Development, the US Department of Housing & Urban Development and the SAS Institute of Cary, NC to create a statewide Strategy for Comprehensive Economic Development for North Carolina. For more information, visit www.nctomorrow.org.

The CEDS Strategy Committee and Staff

The SEDC Board of Directors (See Appendix 3) invited members of organizations representing the main economic interests of the region to serve on the SEDC CEDS Strategy Committee. Representatives included for-profit business interests which constituted a majority of the Strategy Committee. In addition, the Strategy Committee included representatives drawn from the local governments in the region as well as non-profit and community leaders, public officials, private individuals, minority and labor groups, and representatives of workforce development boards and institutions of higher education. The following individuals serve on the CEDS Strategy Committee:

Private Representation (14)

Leon Martin, Senior Vice President, First Citizens Bank (Bladen)
Henry Edmund, President, Security Savings (Brunswick)

Don Hughes, Vice President of Operations, Brunswick EMC (Brunswick)
Dean Hilton, Vice President, Hilton Action & Realty (Bladen)
Paul Barnes, Vice President of Sales & Marketing, Aberdeen & Rockfish RR Co.
Brett Bostic, President, Bostic Building (New Hanover)
Jimmy Smith, Director of Economic & Community Development (Pender)
Glen Walters, Senior VP, Regional Executive, Lumbee Guaranty Bank (Robeson)
Randall Jones, Public Relations, Lumber River EMC (Robeson)
Barbara Knight, Human Resources Director, DuPont Fayetteville Works (Bladen)
Jay Todd, Chief Operating Officer, Service Thread (Scotland)
Wade Dunbar, President, Dunbar Insurance (Scotland)
Jerry Milton, Vice President, Southeastern Interiors (Harnett)
Jill Smith, Director, Safety, Campbell Oil Company (Bladen)

Public and Non-Profit Representation (12)

Chuck Heustess, Director, Bladen's Bloomin' Agri-Industrial, Inc. (Bladen)
Gary Lanier, Director, Columbus County EDC (Columbus)
Amy Cannon, Deputy County Manager, County of Cumberland (Cumberland)

Community and Private Sector Participation

Linda Revels, Board Clerk, County of Hoke (Hoke)

Randall Johnson, Executive Director, NC Biotechnology Center (New Hanover)

Mark Lanier, Chancellor's Office, University of NC at Wilmington (New Hanover)

Rick Sago, County Manager & Economic Developer, County of Richmond (Richmond)

Jimmy Tate, County Commissioner, County of Pender (Pender)

Blondell McIntyre, Administrator, Lumber River Workforce Development Board

John Swope, Executive Director, Sampson County EDC (Sampson)

Charles Chrestman, President, Robeson Community College (Robeson)

Greg Taylor, Executive Director, Fort Bragg Regional Alliance (Cumberland)

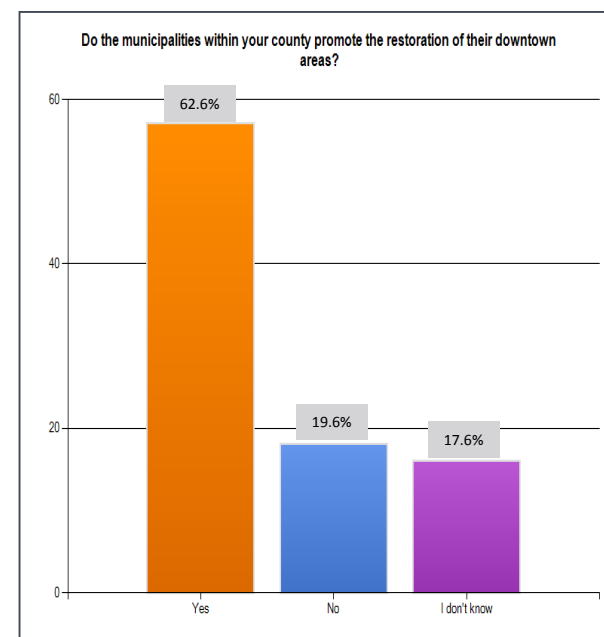
The SEDC staff worked in collaboration with the three Regional Councils of Government (COG) in the Region to establish additional Ad-Hoc Advisory Committees (*See Appendix II*) to support and provide knowledge of the sustainability principles being incorporated in the SEDC CEDS Plan as part of a collaborative effort—the NC Tomorrow Initiative. The SEDC Board of Directors and the District Staff supported the work of the CEDS Strategy Committee and Ad-Hoc Advisory Committee. The Strategy Committee and the Ad-Hoc Advisory Committees met regularly starting in October 2011 to con-

tinue the CEDS process and initiate the development of a new 5-year CEDS Plan for the Region. Throughout the process, the CEDS Strategy provided ongoing guidance for creating the CEDS.

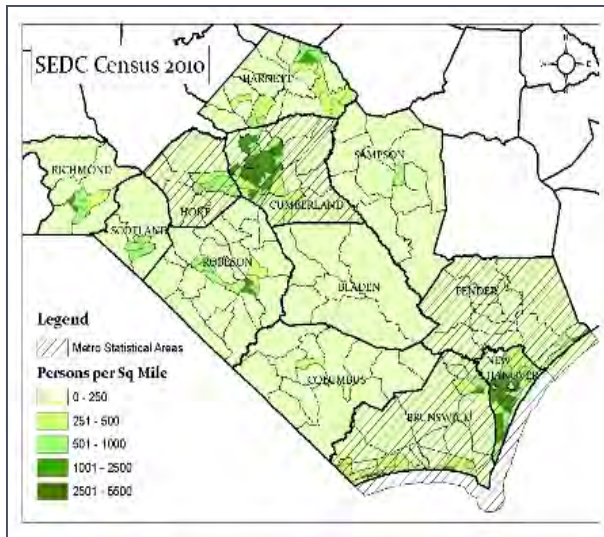
During the CEDS process, the SEDC Staff worked in collaboration with the COGs to facilitate regional meetings with the SEDC CEDS Committee and Ad-Hoc Committee Members as well as additional leaders in the private, public and non-profit sectors to further discuss the CEDS process, existing conditions, and economic development opportunities and visioning for southeastern North Carolina. Throughout the region, eight public meetings were facilitated to conduct the SWOT analysis to help shape the vision, goals, objectives, strategies for the CEDS. The SWOT analyses were used as a baseline to continue discussions about the Region's vision and potential for future economic growth. The analyses from the regional meetings were cross-referenced to identify the top identified strengths, weaknesses, threats and opportunities for the entire region.

Online Survey

An online survey process was used as another method to identify strengths, weaknesses and opportunities in the region. The survey was distributed to a regional resource group, businesses and made available to the general public in the region. This vital step allowed citizens to express their thoughts and add unique perspectives to the process. Nearly 300 people responded. This survey included questions about infrastructure needs, vibrant and livable communities and competitive advantages. Below is a sample of responses from a question administered through the survey in the Lumber River Region.



Regional Profile



Map 1: SEDC Region

Table 1: Population Growth Comparisons 2000-2010 By County

County	Percent Growth 2000-2010	Increased Number Persons 2000-2010
Bladen	9.1%	2,938
Brunswick	46.9%	34,310
Columbus	6.1%	3,340
Cumberland	5.4%	16,453
Harnett	26.1%	23,700
Hoke	39.3%	13,244
New Hanover	26.4%	42,352
Pender	27.1%	11,146
Richmond	0.1%	42
Robeson	8.9%	10,998
Sampson	5.4%	3,274
Scotland	0.6%	205
North Carolina	18.5%	1,486,170
SEDC Region Total	15.4%	162,002

Population and Labor Force Characteristics

By the most recent population count (2010 Census) about 1.2 million persons call the SEDC Region “home”. This is an increase of 15.4 percent over the last decade, almost at pace with the Statewide growth rate of 18.5percent.

Growth, however, has not been even across the region. Brunswick, a coastal county in the Wilmington Metropolitan Statistical Area (MSA), experienced the largest rate of growth at 47 percent—almost a doubling of the county population within a ten year period.

The counties of Harnett, Hoke, New Hanover and Pender followed with rates of increase over 20 percent. Not coincidentally, each of these counties is located within either the Fayetteville or Wilmington MSA where growth has been strongest. **Table 1** illustrates growth by county in the last decade.

Conversely, rates of growth in most of the rural, interior counties have been negligible. Richmond and Scotland grew by less than one percent. In all, seven of the 12 counties within the SEDC Region grew by less than 10 percent—just about half of the State’s rate of growth in that same period. **Map 1** provides an illustration of the varied urban and rural nature of the SEDC region counties. Projected population growth estimates continue this trend.

Projected Population Change SEDC Region

Source: NC State Office of Budget and Management

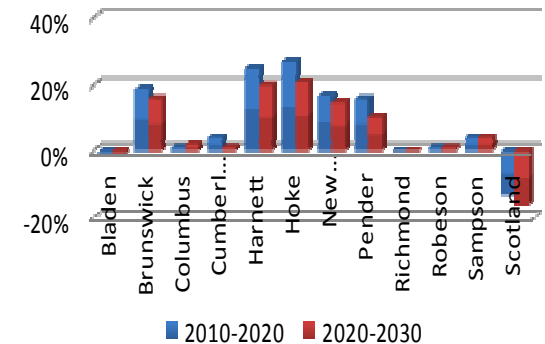
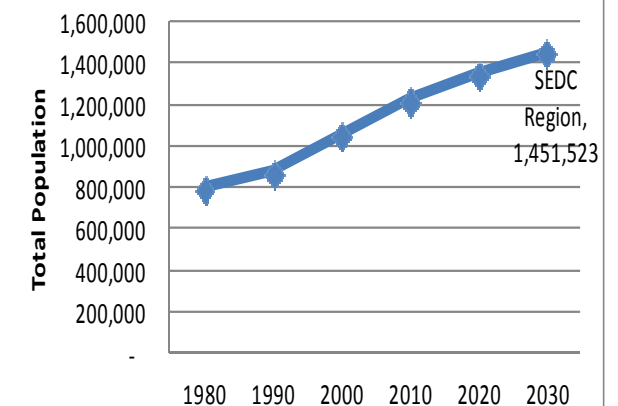


Chart 1: SEDC Region Population

Chart 2: SEDC Region Population 1980-2030

SEDC Region Population 1980-2030

Source: NC State Office of Budget and Management



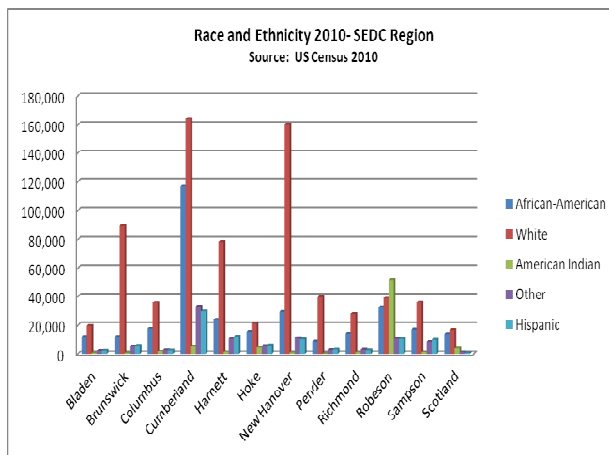
Regional Profile

Total population increase estimated for the SEDC region between 2010 and 2030 is just over 223,000 persons. The majority of this increase is attributable to six counties: Brunswick, Cumberland, Harnett, Hoke, New Hanover and Pender counties. Population loss is projected for Bladen, Richmond and Scotland counties with the estimated decrease in Scotland being the most significant. (See Charts 1 and 2)

Race and Ethnicity

The racial makeup of the region is fairly consistent by county with majority white population (60 percent), followed by African Americans (26 percent), Other Races (8 percent) and American Indians (6 percent). However, Robeson County is the exception among the 12 counties with a majority American Indian population (38 percent) followed by whites (29 percent) and African

Chart 3: Race and Ethnicity 2010-SEDC Region



Americans (24 percent) making it the only truly tri-racial county in the region and in the State. American Indians, primarily members of the Lumbee Tribe, grew to be the majority population during the 1980s. (See Chart 3)

Ethnicity within the SEDC Region leans to members of the Hispanic population. The region is home to over 98,000 Hispanic persons (2010) with 31 percent of this population found in Cumberland County.

Age

The most remarkable demographic change in the population is found in the distribution of age across the population. In 2000, exactly 116,731 persons were counted as aged 65 and over in the SEDC Region. By 2010 that figure had reached 154,672—an increase of 32.5 percent. An estimated 38,000 persons either moved to the area to retire or naturally aged into this bracket during the last decade.

The percent change in the number of people per Census-designated age categories have been calculated for the decade between 2000 and 2010. Chart 4 shows that counties such as Brunswick have experienced an **86 percent increase** in the number of persons 65 and older—a reflection of the attraction of the county to retirement-aged individuals. Hoke, New Hanover and Pender each experienced at least a 30 percent increase in population of this group.

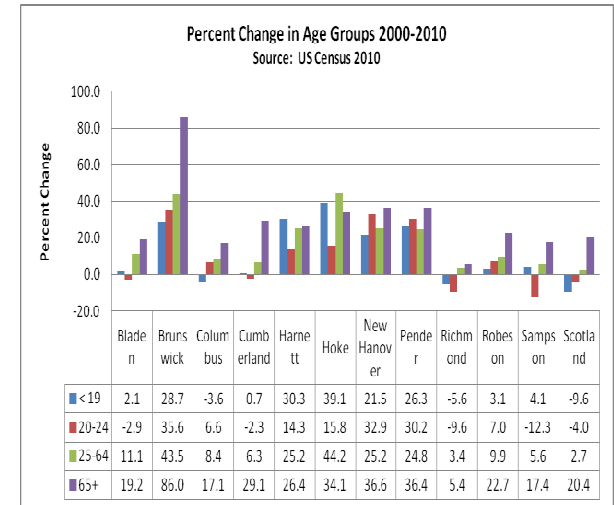


Chart 4: Percent Change in Age Groups 2000-2010

Chart 4 also shows the phenomenon of “Brain Drain” or the loss of college-aged young adults who leave the region and do not return primarily because they cannot find good-paying, challenging jobs in the region. Counties such as Bladen, Cumberland, Richmond, Sampson and Scotland have experienced a **loss of population in the 20-24 age group**. Columbus, Richmond and Scotland counties also experienced a drop in the population 19 and under.

Another disturbing trend emerged when evaluating the people of “working age”—25 to 64 years of age. In every county but Hoke, the percent of population advancing to the 65+ age group exceeds the percent in the working age group. Our region’s increase was 33 percent compared to 27 percent for the State.

Regional Profile

Educational Attainment 2000-2010 SEDC Region and North Carolina Population 25 Years and Older
Source: US Census, ACS

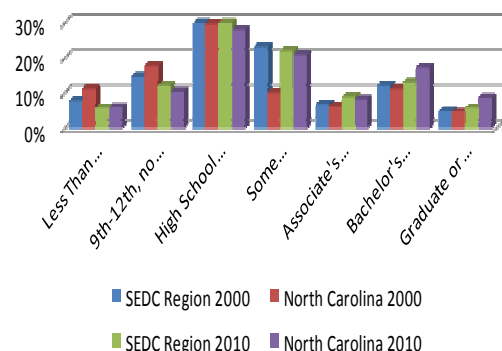
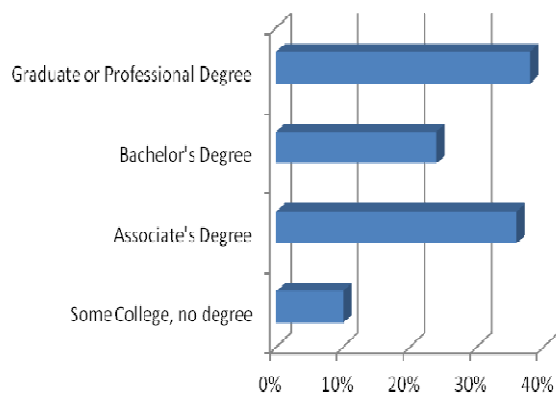


Chart 5: Educational Attainment 2000-2010

Chart 6: Percent Increase in College Exposure and Degrees

Percent Increase in College Exposure and Degrees 2000-2010 SEDC Region
Source: US Census, ACS



Educational Attainment

Advancing the level of education in the population has been linked to better economic outcomes for individuals and the communities in which they live by numerous studies and by the Census Bureau itself. The level of education has an integral link to the wage-earning capacity of individuals. According to an analysis conducted by the US Census for their *Current Population Reports* series, "Higher levels of educational attainment are associated with higher earnings. In 2009, adults with professional degrees earned more than any other education level, with mean monthly earnings of \$11,900 for full-time workers. On average, adults with a master's degree earned \$6,700 per month and those with a bachelor's degree earned \$5,400 per month. Adults with an associate's degree earned \$4,200 per month on average while those with some college but no degree earned \$3,600 monthly." (Current Population Reports, 2011).

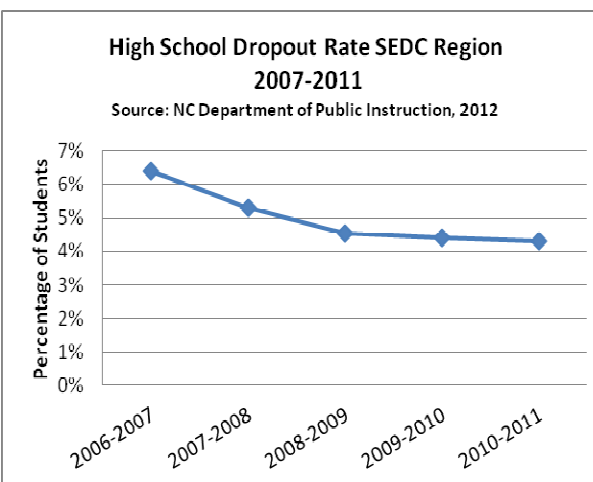
Changes 2000-2010

Educational attainment in the SEDC region is advancing. As shown in the **Chart 5**, the percentage of the population 25 years and older with less than a high school education and without a diploma has declined over the last decade. On the other end of the educational attainment spectrum, the percentage of population with Associate's, Bachelor's and Graduate degrees

has also increased.

Referring to **Chart 6** we see that efforts within the region to increase the number of youth with college exposure and degrees is rising. In 2010 across the SEDC region there were 133,068 persons aged 25 and over counted as having less than a high school education; 33,951 with a high school diploma or GED; 165,293 with some college but no degree (a 10 percent increase over 2000 and the largest group by sheer number); 66,659 with an associate's degree (36 percent increase over 2000); and 146,365 with a bachelor's degree or higher (a 28 percent increase over 2000). These increases are likely connected to the push in the North Carolina Public School System to move high school student towards a college education, particularly the traditional, four-year institutions.

Chart 7: High School Dropout Rates 2007-2011



Regional Profile

High-School Dropout Rates

Work to encourage students to stay in school appears to be successful when viewed statewide. In 2010-2011 North Carolina experienced a **record low** number of high school dropouts—3.43 percent—the lowest recorded rate ever recorded in North Carolina. (NCDPI, Consolidated Report 2010-2011) Dropout rates in eight of the region's 12 counties followed the State trend and declined in the 2011 school year compared to the 2010 year. Dropout rates in four counties—Bladen, Columbus, Richmond and Scotland—increased. The largest percentage increase was experienced in Scotland County. All told, across the twelve counties, a total of 2,100 high school students were counted as dropouts from the system in 2010-2011. *(See Chart 7)*

Educating our Population and Developing 21st Century Skills

Given this age of “globalization” where competition for jobs is increasing, both the college-prep education and the skilled training of students is critical to our economic future. Today's challenge for the K-12 system seems to be not only on securing high graduation rates and sending as many children as practical on to higher education, but also on ensuring that the graduates have the appropriate skills to prepare them for participation in the workforce. At the minimum level, this translates to basic math and language skills, in addition to developing the ability to

think quickly, process information readily and communicate and problem-solve with others.

Much attention is being placed on the need for students to possess the technical skills needed to compete for jobs in the 21-Century economy. The NC State Board of Education and the North Carolina Department of Public Instruction (NCDPI), Community Colleges and traditional Four-year Colleges recognize this need and are working to address it. A Strategic Plan is being implemented by the NC State Board of Education and NCDPI to integrate STEM—Science, Technology, Engineering and Mathematics—learning further into the K-12 system. (NCSBE/NCDPI 2012 STEM Strategic Plan)

Re-Assert the Value of Skilled Trades

However, the diverse demographic nature of the SEDC region makes a “one-size-fits-all” approach to educational development inadequate to meet today's challenges. For many of the interior counties with low-incomes and high poverty rates which influence educational attainment, the challenge to integrate a STEM education curriculum and draw students to this will likely be significant due to budget constraints. In addition, concern is growing in our region for the students with a desire and talent for skilled trades which are not met in a system which encourages its students toward a four-year education.

This concern was voiced in the CEDS visioning meetings and the online survey. Respondents stated that **a parallel track of educating students to the opportunities found in skilled trade jobs must be pursued.** Parents, educators, business owners and economic developers alike voiced a concern that not all high school students in the region should be focused only on a traditional four-year education. Elevating the trade career tracks by involving companies, economic developers and educators in marketing to these students is essential for our regional economic future.

“North Carolina has arguably the finest business climate in America. However, the state is undergoing a critical economic transformation, moving rapidly from a low-skill, low-wage economy to a high-skill, knowledge-based economy driven by technology and innovation. These changes demand an adaptable workforce - one with the science, technology, engineering and mathematics (STEM) skills embedded within the critical 21st Century skills required for successful citizenship. To maintain North Carolina's supremacy, future workers must have the STEM skills leading companies demand and the citizenship the 21st Century now requires for success.”

Excerpted From: **North Carolina's Science, Technology, Engineering, and Mathematics (STEM) Education Strategic Plan, North Carolina Department of Public Instruction, 2011**

Regional Profile

	PCPI 2000	PCPI 2010	Percent Change
Bladen	\$ 28,445	\$ 28,406	-0.1%
Brunswick	\$ 29,743	\$ 32,220	8.3%
Columbus	\$ 28,278	\$ 28,300	0.1%
Cumberland	\$ 31,090	\$ 42,523	36.8%
Harnett	\$ 28,683	\$ 28,537	-0.5%
Hoke	\$ 22,093	\$ 30,972	40.2%
New Hanover	\$ 37,637	\$ 35,085	-6.8%
Pender	\$ 27,900	\$ 30,381	8.9%
Richmond	\$ 25,644	\$ 27,741	8.2%
Robeson	\$ 23,621	\$ 24,599	4.1%
Sampson	\$ 26,580	\$ 29,729	11.8%
Scotland	\$ 26,802	\$ 28,525	6.4%
SEDC Region	\$ 28,043	\$ 30,585	9.1%
North Carolina	\$ 35,337	\$ 35,007	-0.9%

Table 2: Per Capita Person Income. Source: StatsAmerica

Table 3: Poverty 2000-2010. Source: StatsAmerica

	Percent in Poverty 2000	Percent in Poverty 2010	Estimated Number of Persons
Bladen	18.5%	22.3%	7,847
Brunswick	13.2%	16.5%	17,726
Columbus	19.9%	26.9%	15,628
Cumberland	13.1%	18.2%	58,136
Harnett	14.6%	16.7%	19,151
Hoke	16.2%	19.0%	8,921
New Hanover	12.0%	18.1%	36,683
Pender	13.9%	16.7%	8,720
Richmond	17.5%	28.1%	13,106
Robeson	23.6%	31.5%	42,263
Sampson	16.2%	21.4%	13,574
Scotland	18.6%	27.2%	9,835
SEDC Region	16.4%	21.9%	251,591

Income and Poverty

Per Capita Income

Job losses and record unemployment statewide have wreaked havoc on income in North Carolina. The slow recovery from the extended recession has stagnated wage and salary increases for those with jobs. For those without, extended unemployment insurance has been a blessing but the incredibly slow return of jobs to this region has placed further downward pressure on incomes here.

The Per Capita Personal Income (PCPI) is utilized by the EDA to help assess the economic distress of an applicant for funds. The PCPI includes income from all sources: income from labor, proprietor's income, government transfer payments (welfare and Social Security) dividends, interest and rent. The 2010 PCPI for the SEDC Region is \$30,585. As **Table 2** shows, this is much lower than the PCPI for North Carolina—\$35,007.

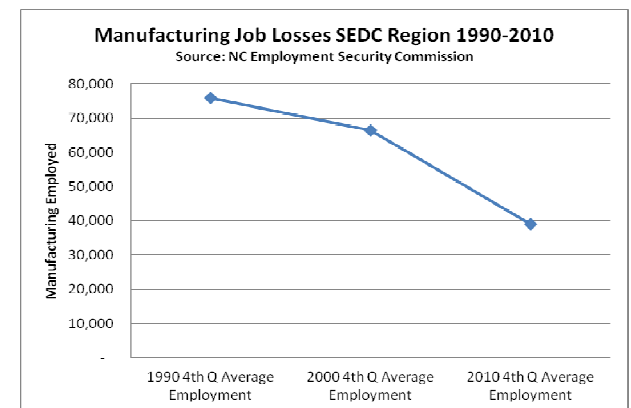
Again, reflecting the diversity within the SEDC Region, the change in PCPI over the last decade has ranged from remarkably positive to remarkably negative. In counties such as Cumberland and Hoke where the influx of military due to base realignment has bolstered the population, per capita income has grown—over 36 percent in Cumberland and 40 percent in Hoke between 2000-2010. Conversely, losses in the PCPI have been experienced by three counties—Bladen,

Harnett and New Hanover. Very modest gains have been made in others. Overall, the PCPI increased by only 9.1 percent for the SEDC Region from 2000 to 2010.

Poverty

As income levels have declined or remained stagnant, the number of persons living in poverty in the SEDC region has increased. About 252,000 persons—21.9 percent of the region's population—had incomes below the poverty level in 2010. (**See Table 3**) Poverty rates in all twelve counties increased between 2000 and 2010. **Bladen, Columbus and Robeson are among the State's ten counties that experience "persistent poverty"** which is defined by the US Department of Agriculture as a county that has at least 20 percent of the people in the county have lived in poverty from 1970-2000. (BTC Brief, *The Legacy of Hardship*).

Chart 7: Manufacturing Job Losses



Regional Profile

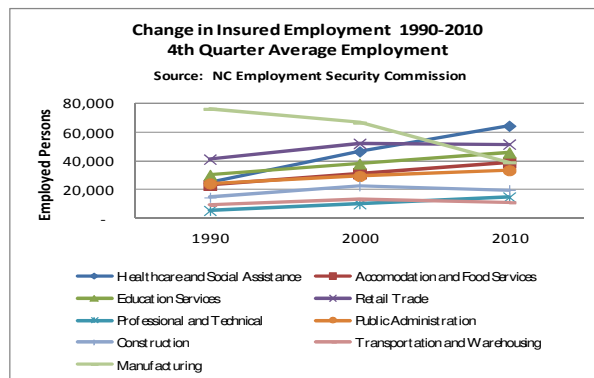
Employment, Wages and Unemployment

Within the SEDC Region there were 559,604 persons considered to be in the civilian labor force at the end of June 2011. As shown in **Table 4**, of these, over 63,000 or 12.2 percent were unemployed. Here we examine the changes in employment, wages and unemployment of the labor force highlighting the effects of structural change on our economy and the impacts of recession on the profile of jobs which are emerging and fastest growing in the region.

Employment

Using data available from the NC Employment Security Commission we have examined the changes in employment across the region over a twenty year period between 1990 and 2010. In 1990, the economy of this region was fairly stable and growing but heavily reliant on manufacturing.

Chart 8: Employment Change 1990-2010



In the mid-nineties the effects of off-shoring were evident. By 2010, exacerbated by the effects of the cyclical recessions, the number employed in manufacturing-related jobs had dropped by 36,000 persons. (*See Chart 7*)

Occupational change in the region has been toward the middle and lower-end service sector jobs. Over the twenty year span, the largest gain in employment across the SEDC region has been in Healthcare Services where 39,550 jobs were gained 1990-2010. Accommodation and Food Service experienced the second largest gain of 15,751 jobs followed by Education Services at 15,558 and Retail Trade at 10,375. The “middle tier” jobs that manufacturing provided—those with decent wages and some benefits—are gone with very few exceptions, leaving behind tremendous rates of unemployment which have been exacerbated by cyclical changes in the global and national economies. Workers who were able to locate a new job have taken lower wage positions typically without benefits in service sector occupations. **Chart 8** illustrates the gains and losses over the period by field of employment over the 20 year period.

Job Openings and Fastest Growing Occupations

While there are efforts underway at the region’s universities and community colleges, coupled with the efforts of the Workforce Development Boards to train and educate workers for the “knowledge jobs” of the future, the region’s fastest growing jobs are lower-paying service jobs. **Table 5** shows that for all of the Workforce Development Board

County	Total Labor Force	Employed	UI Rate
Bladen	15,720	13,658	13.1%
Brunswick	50,489	44,688	11.5%
Columbus	24,167	20,814	13.9%
Cumberland	142,251	127,739	10.2%
Harnett	49,297	43,565	11.6%
Hoke	22,292	20,096	9.9%
New Hanover	107,246	96,580	9.9%
Pender	24,318	21,390	12.0%
Richmond	20,166	17,364	13.9%
Robeson	56,969	49,049	13.9%
Sampson	32,892	29,932	9.0%
Scotland	13,797	11,376	17.5%
SEDC Region	559,604	496,251	12.2%

Table 4: Labor Force and UI Rate: NC Employment Security Commission

Table 5: Most and Fastest Growing Employment 2012: NC Employment Security Commission

Workforce Development Board Region	Most Employed Occupation	Fastest Growing Occupation	Occupation with Most Total Openings	Mean Hourly Wage 2012 Retail Sales
Cape Fear	Retail Sales	Personal and Home Care Aides	Retail Sales	\$11.26
Cumberland County	Retail Sales	Network Systems and Data Communications Analysts	Retail Sales	\$11.22
Lumber River	Home Health Aides	Personal and Home Care Aides	Home Health Aides	\$10.76

Regional Profile

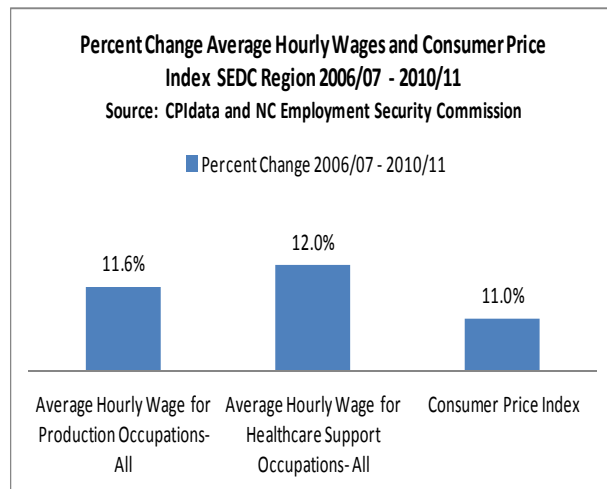
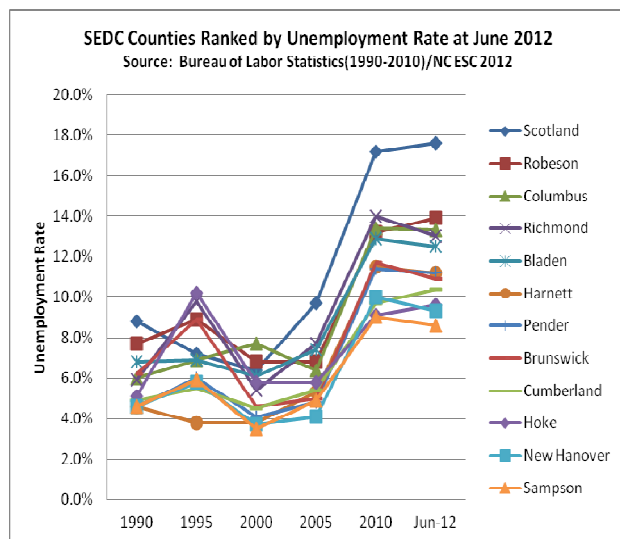


Chart 9: Comparison of Percent Change CPI and Average Annual Wages

Chart 10: SEDC Counties Ranked by UI Rate—June 2012



Regions, most employment is found in Retail Sales. Further, based on analysis done by the NC Employment Security Commission, the fastest growing occupations predicted through 2018 have been identified. For the Cape Fear and Lumber River regions, Home Health Aides is the fastest growing occupation with an average hourly wage between \$8.83 - \$9.85. Only in the Cumberland County region do we see the “Knowledge Jobs” of network and computer analyst positions emerging as the fastest growing. The 2012 average hourly wage for these occupation is \$33.08.

Stagnant Wages

For most of the region’s unemployed, finding a new job in the service sector has meant lower wages and little or no benefits. Comparatively, a production (manufacturing) worker today in the SEDC Region averages \$14.78 per hour, a retail sales employee \$10.91, and a home health aide \$9.37 per hour.

Compounding the effects of reduced wages, the impact of the recession has been to stagnate wage growth, even in the higher wage occupations. Comparing data on occupational wages to change in the Consumer Price Index—the government’s key inflation indicator—wages in both production occupations (manufacturing) and healthcare support occupations have grown about **one percent** over the period 2006/07 to 2010/11 above the rate of inflation. **Chart 9** illustrates this comparison.

Unemployment

Massive job losses starting in the mid 1990’s and extending into the current decade have left a significant mark on the region. Vacant factories can be found in just about every community, most in a state of complete abandonment and leaving towns and counties with unpaid property taxes. Only in isolated cases have companies shuttering plants worked out arrangements with towns or counties to donate the properties, offering the opportunity for creative reuse at some future time.

From 1995 to 2012 (June) the NC Employment Security Commission reports that 1,060 establishments in the region have closed. The peak occurred in 2010 with 163 businesses closing in one year and is likely a result of the impact of the current recession on top of the underlying structural change occurring in the region’s economy.

Chart 10 shows the annual change in the unemployment rate from 1990 through June 2012. Current unemployment rates range from a low of 8.6 percent in Sampson County to a high of 17.6 percent in Scotland County as of June 2012. The average rate of unemployment for the SEDC region in June 2012 was 12.2 percent. The current (seasonally adjusted) unemployment rate for North Carolina is 9.4 percent and for the United States is 8.3 percent.

Regional Profile

Commuting Patterns

As industries and businesses streamline processes and become more efficient to function in the global, competitive economy, fewer workers with specific skill sets are needed. Therefore, the ability of workers to move to jobs that are available takes on greater significance in the current and future economy of the region. The commuting patterns in to and out of the counties within the SEDC Region between 1990 and 2010 are shown in **Chart 11**.

As the chart shows, only four counties in the region actually experience a net gain of workers—Cumberland, New Hanover, Scotland and Bladen. In 2010, over 25,000 workers commuted out of the counties where they live to work in one of these four counties. The employment draw for the metro areas of the SEDC region—New Hanover (Wilmington MSA) and Cumberland (Fayetteville MSA) are significant.

Net losses of workers from the neighboring counties likely result from this movement to regional employment centers. Since the 1960 Census, Scotland County has experienced a net immigration of workers. For Bladen County, net immigration is a new occurrence and is likely the result of job growth at the Smithfield Foods

plant in Tar Heel coupled with the county's efforts in support of entrepreneurship and growing jobs from within. Most of the counties in the SEDC region have active programs to encourage entrepreneurship.

The impacts of out-migration for work are felt at the household, community and county levels. For households, the lack of jobs in their resident counties means absorbing additional costs in gasoline, automobile maintenance and childcare. Spending more on these items leaves less disposable income upon which a household is expected to survive. For communities and counties the net loss of workers translates to fewer dollars spent supporting their resident counties. Workers that travel out of county spend on gas, food and similar items closer to their actual job location. Finally, as demand for services and amenities in the resident counties grows, the areas without a jobs base are left with the residential tax base upon which to generate income for these services. With fewer and geographically dispersed residents, the ability to raise revenue through property tax increases and provide for needed services convenient to the population is a continual challenge.

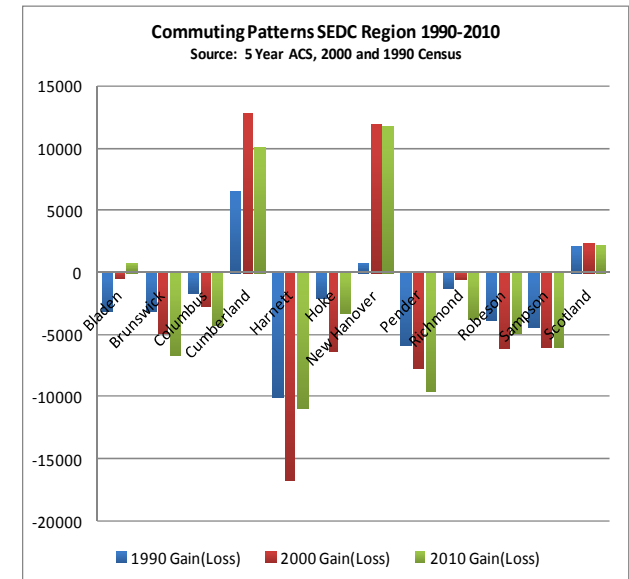


Chart 11: Commuting Patterns

Photo: Commuting Traffic in Wilmington, NC. Photo Courtesy of Publicdomainphoto.com.



Future prosperity for rural workers, in particular, may depend not only on education and training but on the willingness to travel distances to work. In 2010, everyday 25,000 workers left their home county and traveled to work in another county.

Regional Profile

Housing Type - SEDC Region 2010
Source: American Community Survey 5 Year Estimates

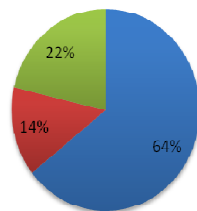


Chart 12: Housing Tenure and Mobile Homes SEDC Region 2010

Table 6: Housing Stock SEDC Region 200-2010/Source: ACS 5-Year Estimates

County	2000 Total Housing Units	2010 Total Housing Units	Percent Change
Bladen	15,316	17,718	14%
Brunswick	51,431	77,482	34%
Columbus	24,060	26,042	8%
Cumberland	118,425	135,524	13%
Harnett	38,605	45,545	15%
Hoke	12,518	18,211	31%
New Hanover	79,616	101,436	22%
Pender	20,798	26,724	22%
Richmond	19,886	20,738	4%
Robeson	47,779	52,751	9%
Sampson	25,142	27,234	8%
Scotland	14,693	15,193	3%
SEDC Region	468,269	564,598	17%

Housing

The housing inventory in each of the SEDC Region counties increased between 2000 and 2010. In 2000, the region supported a total of 468,269 units compared to 564,598 units in 2010—a 17 percent increase. *(See Table 6)*

Brunswick County was responsible for the majority of that increase (34 percent) as a result of the influx of retirees to this coastal county coupled with the development of seasonally-occupied housing along the beach. The next highest increase was experienced in Hoke County (31 percent) as developers worked to meet the housing demand generated by persons relocated to Fort Bragg as a result of base realignment and the presence of FORSCOM. **Table 6** shows the increases in housing stock by county.

Housing Tenure and Presence of Mobile Homes

Chart 12 shows that the majority of households in the region occupy single-family homes (64 percent) and only 14 percent of the units are multi-family. Mobile homes, driven by the facts that they are more affordable in the rural counties and more attractive as investments in the coastal counties, are prevalent throughout the region and account for 22 percent of the SEDC Region's housing stock.

Affordability

As reported during the regional visioning meetings, housing affordability is a significant

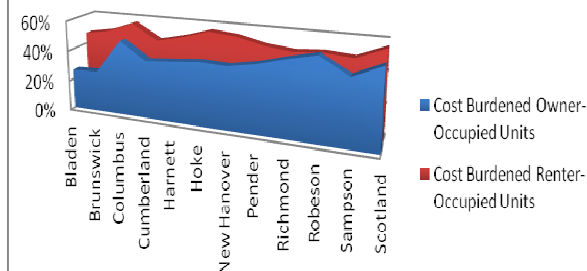


Above: Luxury Townhomes on the Intracoastal Waterway, Brunswick County

Chart 13: Cost-Overburdened Households 2010

Percent of Households Paying More than 30 Percent of Income for Housing 2010

Source: American Community Survey, 5 Year Estimates



Regional Profile



Above: Replacement Housing through a Hoke County Community Development Block Grant program.

problem in certain portions of the SEDC Region. For the rural, inland counties where poverty rates are high, mobile homes represent the more affordable housing option than stick-built homes. In Bladen, Columbus, Robeson and Sampson counties, mobile homes make up **a third** of the occupied housing.

Affordability was also reported as a problem in the coastal counties by young professionals that are unable to qualify for the available housing due to high prices.

The challenge of housing affordability in the SEDC Region is also present when examining the number of households paying more than 30 percent of their income for housing. This is a widely accepted measure of affordability in the housing industry. **Chart 13** shows that in the 12 counties, 43 percent of households in owner-occupied housing are “cost overburdened”. The figure is a

staggering 51 percent of rental-occupied housing in these counties.

Infrastructure: Transportation, Telecommunications and Water/Sewer

Transportation infrastructure—highways, railways, airport, water transportation—and water and wastewater systems provide vital services to the residents of the SEDC Region. They also form a network essential to attract new business and industry and support our existing business community. The current condition of much of the infrastructure in the SEDC region is like that across most of North Carolina and the nation—it is in need of investment and repair. We have made recent infrastructure investments in the SEDC Region, through private and public sources, but there is much remaining to be accomplished. Below a brief summary of condition and needs

Photo: US Highway 74 in Scotland County.



for the region’s major infrastructure assets to support job retention and growth in the region.

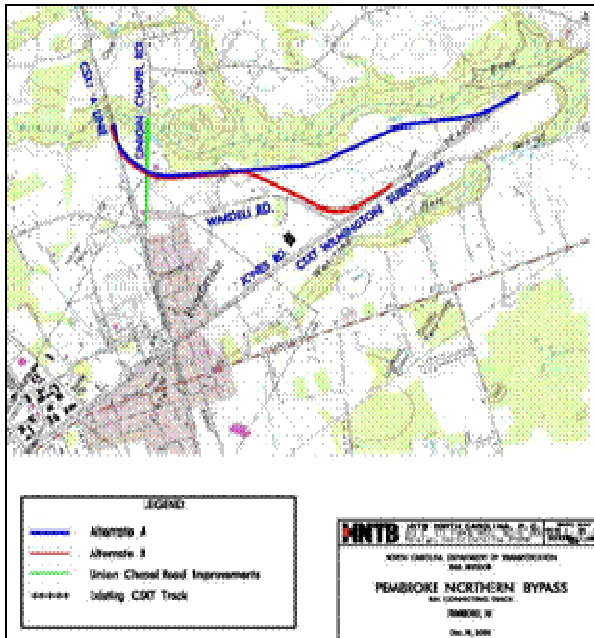
Highway System

Interstates 95 and 40 together with and US Highway 74 form a triangle of major highway access over the SEDC region stretching from Fayetteville to Wilmington and from Wilmington west toward Charlotte. A number of secondary roads provide a network of connections between major highways.

Interstate 95 is a major north-south transportation corridor for the east coast. I-95 extends through Cumberland, Harnett, and Robeson Counties within the SEDC Region. Annual Average Daily Trips recorded at Lumberton in 2011 exceed 51,000; in Cumberland 38,000-44,000 ADT and in Harnett 48,000 ADT. (NCDOT, Traffic Volume Maps) Plans for needed improvements of the I-95 corridor and how to pay for those improvements are currently under study by the NC Department of Transportation. In response to the concerns expressed by the public and members of the NC Legislature to tolling as a means to pay for these needed improvements, an Economic Impact Study is currently underway to evaluate the various physical improvements needed and the means to finance those.

Us Highway 74—our major east-west highway—has been designated by the NC Department of Transportation, Commerce and Environment as a Strategic Highway Corridor. The designation recognizes the significance of this corridor to the

Regional Profile



Above—Map 2: Needed Rail Connector Project at Pembroke.
Source: NCDOT.

North Carolina's central location linking the Mid-Atlantic to the Southeast will translate to higher freight volumes on the State's railways. Its location and transportation assets give it competitive advantages. Efficient and reliable rail transportation is imperative to the competitiveness of North Carolina manufacturers, agricultural producers, construction industry and military.
Source: NCDOT 2009 State Rail Plan, pages 2-3.

future economic growth of the region and the State. Several transportation projects along the Highway 74 corridor have expanded sections to a separated four-lane highway with controlled access. The remaining high priority projects in Richmond County are identified as critical projects for this CEDS.

Many opportunities for coordination exist between the Rural Transportation Planning Organizations and the Metropolitan Planning organizations that serve the SEDC Region. Each of these groups have identified core projects which aim to reduce inefficiencies and maximize the opportunity to move people and freight under current budget constraints. A detailed list of proposed highway transportation projects is included under **Section 7: Goals, Objectives and Strategies**.

Rail System

NCDOT reports that the demand for both passenger and freight rail is growing in the State. Drivers of increased rail demand within the SEDC Region include a growing population seeking efficient, multi-modal forms of transportation, manufacturers, agriculture producers and processors, the Port of Wilmington and the US Military. Within the region, rail service is provided by private companies including CSX, Northern and Southern and a group of smaller short line rail companies.

Deficiencies in the rail system highlighted in our regional visioning meetings include the need for

a CSX-Fort Bragg connector in downtown Fayetteville and the rail connector at Pembroke. **(See Map 2)** The Fort Bragg Regional Alliance and the NC Ports Authority have identified these projects as **essential** to moving personnel and equipment to the Port of Wilmington. Fort Bragg operations find it easier to utilize the Port of Charleston in South Carolina due to ease of rail access and improvements which the Department of Defense has made at that port. Comparatively, Fort Bragg operations incur increased transportation expense and time delays in moving people, equipment and supplies utilizing the Wilmington Port.

The NC Department of Agriculture has also identified the turn at Pembroke as essential to supporting the growth of agricultural exports which support the future growth of the SEDC Region. A detailed list of proposed rail transportation projects is included under **Section 7: Goals, Objectives and Strategies**.

Ports

The presence of the State Port at Wilmington was identified in the visioning meetings as a regional strength and a threat. The port, located midway along the eastern seaboard offers a 42-foot navigational channel and terminal facilities serving container, bulk and breakbulk operations. The Wilmington Port is one of few South Atlantic ports with readily available berths and storage areas for containers and cargo. (NCSE 2011 Regional Profile, page 20)

Regional Profile



Photo: Port of Wilmington, Photo Courtesy of NC Ports.

The strength of the Port lies in its ability to serve the import/export needs of the region, the State and the Southeast and through doing this creating significant economic value to the region and the State. In fact, a study conducted by The Institute for Transportation Research and Education (ITRE) at North Carolina State University found that Port services contributed almost \$6.4 billion to the economic activity of the State in 2009 and supported almost 62,000 jobs. (ITRE, page iv)

The threat lies in the inability of the Wilmington Port to deepen its navigational channel to handle post-Panamax shipping vessels. With the improvements to the Panama Canal expected to be completed in 2014, a new generation of shipping vessel requiring a deeper draft will now be able

to access the East Coast ports directly from Asia. The State of North Carolina began investigations in 2006 to develop an International Deep Water Port on the coast within the SEDC Region. However, these investigations and efforts to support the development of a deep water port have been dropped for lack of political will to move forward with a further Feasibility Study.

A detailed list of proposed port improvements projects is included under **Section 7: Goals, Objectives and Strategies**.

Airports

Our Region is home to two major public airports serving both domestic and international flights and providing freight service. Fayetteville Regional Airport maintains two runways one of which is capable of handling jet traffic—7,700 and 4,800 feet. Wilmington International Airport maintains two runways—7,700 and 8,000 feet—both capable of handling jet traffic.

The military in our region maintain two Army air fields—Simmons and Pope Air Field. In addition, there are ten publicly-owned, general aviation airports located in the SEDC Region with varying capabilities to handle corporate and freight air traffic.

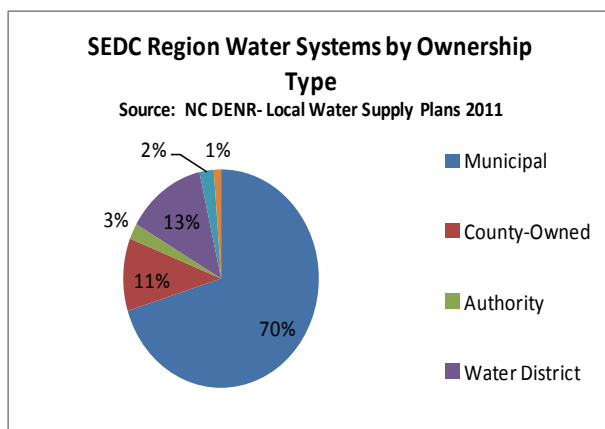


Photo: C-130 Cargo Transport. Photo courtesy of Publicdomainphotos.com.

In anticipation of the improved Panama Canal, many Port Authorities are actively working to increase their capacity to handle shipping containers and to accommodate Post-Panamax vessels, as well as to improve intermodal transportation connections. A port must have a terminal with at least 45 feet of draft and at least 45-50 feet in a navigable channel to handle Post-Panamax ships. As of early 2011, only Norfolk, Charleston (at high tide) and New Orleans met the requirement in terms of depth, but many ports across the East and Gulf Coasts are working to remain competitive. (Source: Freight Transportation and Economic Development, NADO Research Foundation, February 2012, Page 4)

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Chart 14: Water Systems by Ownership Type. Source: NCDENR Local Water Supply Plans.



The airbase located between Maxton and Laurinburg known as the Laurinburg/Maxton Airbase (**See Map 3**) has been identified by a State Logistics Study as a potential *Logistics Village* location. The goal of the **Seven Portals Study—Southeast Region Report** was to explore ways in which transportation assets—air, rail, highway and port connectivity—can help expand the state’s economy and support strategically-located *Logistics Villages*. The facility was named as the first in priority of logistics villages in the southeastern region of the State due to its availability of developable land, adequate and improving roads, and ready access to most infrastructural needs. (Southeast Region Report, page 3). The strategic physical location of this facility with direct interstate access to the Ports of Wilmington and Charleston make it attractive for future economic development.

- **Water Systems**

Of these systems over half—59 percent—are

Within the SEDC Region there are six major regional systems to which most of this available excess supply can be attributed. These systems include the Cape Fear Public Utility Authority in Wilmington, Fayetteville Public Works Commission, Brunswick County Water System, Harnett County Regional Water System, Robeson County Water System and the Richmond County Water System. Together, they produce 95 percent of the available water capacity in the region and serve 761,000 of the region's total estimated population of 1.2 million persons with treated drinking water. Together, Fayetteville PWC and the Harnett County Regional Systems also supply 100 percent of water demand at Fort Bragg.

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In the spring of 2012, a second major regional facility owned by the Lower Cape Fear Water and Sewer Authority was placed online in Bladen County to provide a surface water alternative for the Smithfield Foods plant in Tar Heel (Bladen County). The world's largest hog processing facility, the Smithfield Plant utilizes 3 MGD of the plant's 4 MGD capacity and employs over 5,000 persons in the region. The Bladen Bluffs facility responded to the State of North Carolina's demand that the Smithfield Plant move to a surface water supply as groundwater sources in the region were being noticeably depleted. A cone of depression was developing in the county and threatened the viability of the region's groundwater supply for the future. **(See Map 4)** The groundwater monitoring effort which revealed this cone was partially funded by a grant from EDA to the Lumber River Council of Governments, a regional planning organization that has developed a 30-year history in supporting water management in the region.

The Bladen Bluffs facility (see photo at right) was a win-win for economic development and the region's environment. The facility is expandable under a permit which allows 30 MGD to be withdrawn from the river at this location.

• Sewer Systems

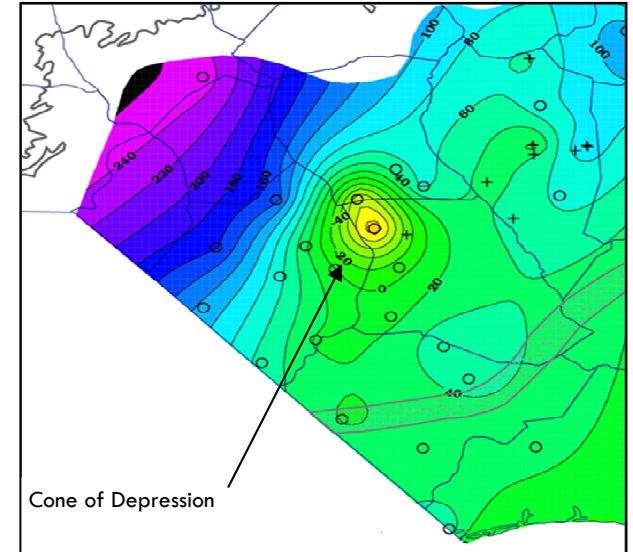
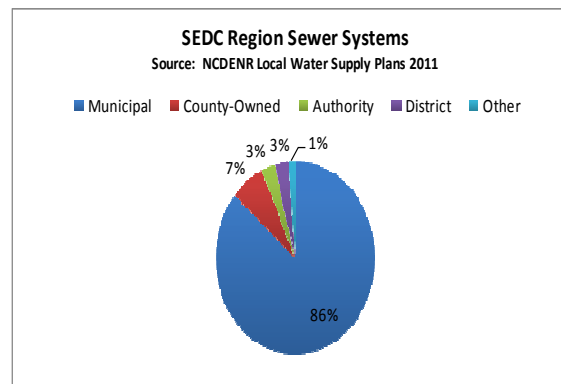
Within the SEDC Region there are 73 public sewer systems. Ownership of these systems

resides primarily with municipalities—about 86 percent. **Chart 15** shows the distribution by ownership.

The current permitted capacity or purchase volume of these systems is 160 MGD. The average daily demand taken over a yearly period is 54 MGD, and the maximum daily demand is 86 MGD across all facilities. Excess capacity is available in each of the systems in varying amounts.

Over half of the sewer systems are regional in nature. The Cape fear Public Utilities Authority and the Harnett County Regional Water System are the largest of the regional systems within the SEDC Region.

Chart 15: Sewer Systems by Ownership Type. Source: NCDENR Local Water Supply Plans.

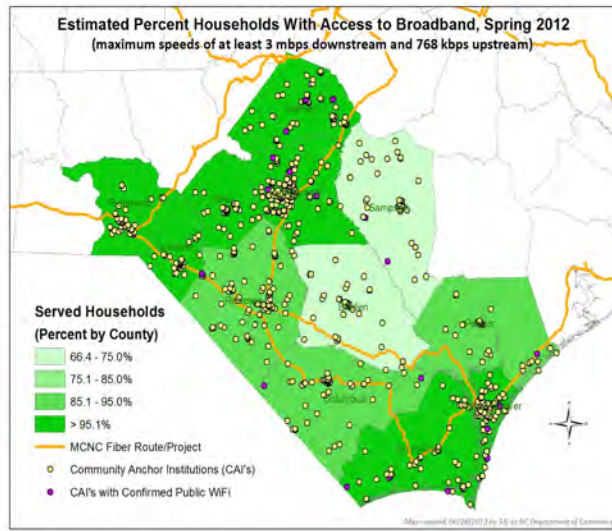


Map 4: Cone of Groundwater Depression at Smithfield Foods Plant in Tar Heel, NC Source: GeoResources.

Photo: Bladen Bluffs Regional Water Facility. Source: LCFWSA.



Regional Profile



Map 5: Households with Access to Broadband, Spring 2011, SEDC Region. Source: NC Broadband, NC Department of Commerce

Telecommunications

The ability of our citizens, businesses and industries to communicate effectively and quickly via the internet underpins the economic success of our region. Today, our schools from K-12 through colleges and universities all need to be able to rely on internet connectivity to provide our students with a globally competitive education. Whether on-campus or through distance learning opportunities, educational services are increasingly reliant on internet technology.

This is also true for our region's businesses and industries. Whether connection through a point-of-sale device, web-marketing, access the

healthcare records by hospital staff or simply driving the complex machinery of today's manufacturers, internet access is essential to grow and retain jobs.

As in other states, the most widely available internet service in North Carolina is provided via DSL (Digital Subscriber Line) where data is carried over telephone company lines. While the most widely available, it is typically the slowest and least reliable service. Much preferred today are the "high speed" types of access where the internet is always available thru cable, fiber or wireless service providers. This type of internet service, called "Broadband" is typically demanded by business, industry and educational institutions.

Within the SEDC Region, challenges with both high speed internet service and broadband width—the amount of data that can be carried over a fiber line—exist and stymie economic development. Participants in the visioning sessions indicated that reliable, high-speed telecommunication service was uneven across all twelve counties. To further investigate broadband coverage in the SEDC region, we have collaborated with NC Broadband within the NC Department of Commerce, a group charged with Broadband mapping, and addressing capacity building and digital literacy. Efforts to address the "digital divide" or gap between rural and urban access and use of broadband technology drive their work.

While the State together with organizations such as the Golden LEAF Foundation are making strategic investments in laying fiber to key institutions in rural counties, much work remains to be done to extend access to all citizens in the SEDC Region. **Map 5** shows the estimated number (less than 65 percent) of households by county with access to broadband service, either in their home or through a Community Anchor Institution. As the map illustrates, Bladen and Sampson counties—both rural in nature—have the lowest number of households with access. Making broadband available to schools, businesses and homes, educating citizens on the benefits of broadband internet service and building the capacity of the region to utilize the service will support our sustainable economic future. **Projects and strategies to ensure this happens are included under Goal 2.**

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Community Colleges and Universities

The SEDC Region is home to eight community colleges, three four-year universities and three private four-year colleges. Together these educational institutions form a strong network providing services to youth and lifelong learners, and extend specialized workforce training programs which support special our business and industry sector. Total enrollment for FY2011-2012 was over 87,000 students. **(See Table 7 for enrollment)**

Community Colleges

Our eight community colleges (all members of the North Carolina Community College System), provide programs ranging from general education, specialized industrial training and early college which provides opportunities for high school students to take courses and experience the college world for credit prior to high school graduation. Enrollment for FY 2012 at our eight colleges is over 44,000 students.

A recent and promising investment in the community colleges has been the connection of each to NCREN, the North Carolina Research and Education Network. Funded by the State in collaboration with private foundations, NCREN provides a seamless connection to high speed "Internet2" and provides sharing of virtual resources.

Investments in workforce development at the community colleges in the region are extensive. Given the magnitude of job loss and the need

for job retraining, our community colleges have served thousands of dislocated workers with retraining services. The Career Readiness Certificate Program offered at all of our locations is a nationally-recognized certificate that business and industry alike seek from candidates certifying to a series of necessary workplace skills.

Our community colleges are also home to the Small Business Centers which are part of the NC Small Business Center network which is recognized as the most extensive state-funded network in the nation supporting small businesses.

Universities and Four-Year Colleges

The SEDC Region is home to Universities part of the North Carolina System at Wilmington, Pembroke and Fayetteville. UNC-Pembroke has been recognized by US News and World Report as one of the most diverse universities in the nation. UNC-Wilmington has been recognized by the same group as the fifth best public regional university in the South. (NCSE, 2011 Regional Profile, page 36). All provide undergraduate and graduate level degrees.

Methodist University in Fayetteville, Campbell University in Buies Creek and St. Andrews University in Laurinburg round out the region's higher education resources as the three private colleges and universities in the SEDC Region. Campbell is home to one of the state's premier Law Schools. Methodist University offers both undergraduate and graduate degrees; St. Andrews offers undergraduate only.

Photo: Robeson Community College Workforce Development Center, funded in part by a grant from EDA. Photo courtesy of Robeson Community College.



Table 7: Enrollment Statistics, 2011. Source: UNC System/NC Community College System/Private Colleges and Universities

Institution	2011-2012 Enrollment
Community Colleges	
Bladen	2,392
Brunswick	2,011
Southeastern	2,871
Fayetteville Technical	15,776
Cape Fear	12,751
Robeson	3,604
Sampson	2,035
Richmond	2,855
	44,295
Colleges and Universities*	
Campbell	5,912
Fayetteville State	6,235
UNC-Pembroke	6,664
UNC-Wilmington	13,156
Methodist	10,891
St. Andrews	506
	43,364
*Includes full-time and part-time undergraduate and graduate students	

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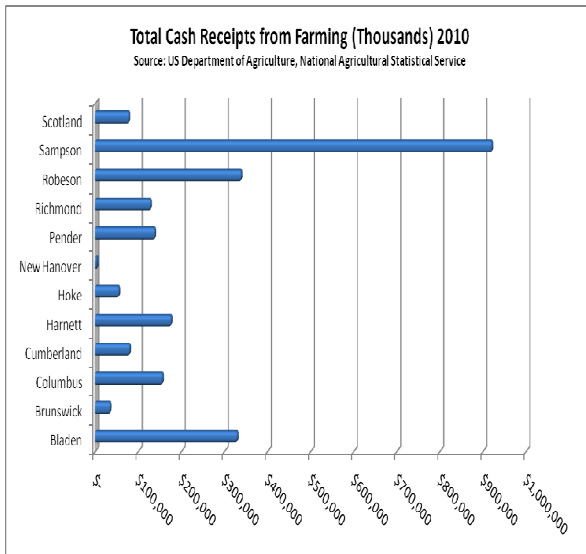


Chart 16: Total Cash Receipts from Farming SEDC Region

Photo: Farm Operator, Pick-Your-Own Strawberries location in Robeson County.



Agricultural Economy

Agriculture—both in farming and food processing—remains a dominant industry not only in terms of acres under production or in use for farming across the SEDC Region, but also in employment and value of product to the local economy. Continued support of this industry and assistance with diversification strategies to strengthen the industry are needed to ensure employment and income in the region.

Importance of Agriculture to North Carolina

The most recently available statistics (2011) indicate that agriculture—food, fiber and forestry—contributed more than \$70 billion to the State's economy in 2010, 18 percent of State income, and accounted for 17 percent of the State's workforce. According to the USDA, North Carolina is the most diversified production state in the nation with over 80 commodities and 8.6 million of 31 million State acres in agricultural production. North Carolina is home to 52,400 farms and a value of farm exports exceeding \$2.74 billion. Agriculture is the State's leading industry. (NCDA Website)

Importance of Agriculture to the Region

North Carolina's leading commodities include cotton, soybeans, corn, wheat, hogs & pigs, poultry, nursery and greenhouse products, and fruits/vegetables all of which dominate the farming industry in our Southeastern Region. Sampson (#2), Robeson (#5) and Bladen (#6),

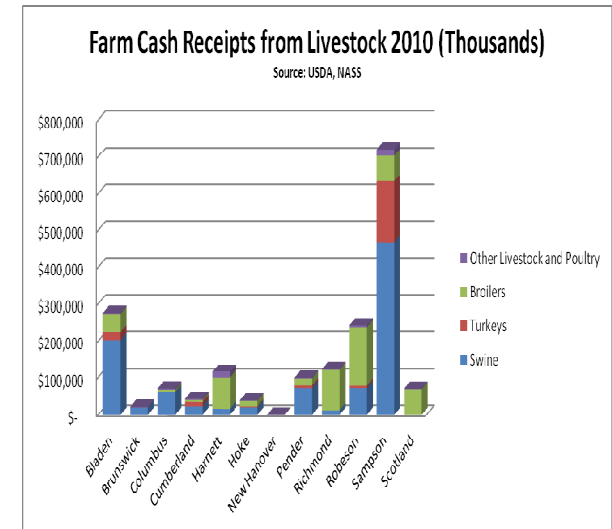
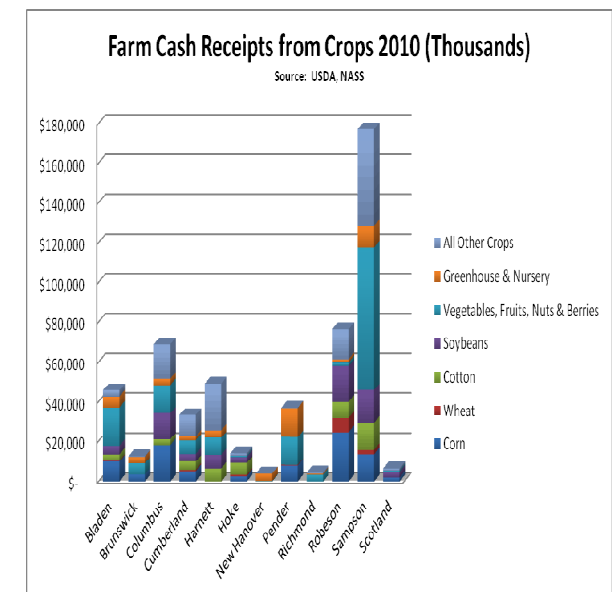


Chart 17: Livestock Farm Cash Receipts for the SEDC Region

Chart 18: Crop Cash Receipts for the SEDC Region



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counties all ranked within the top ten counties statewide in Farm Cash Receipts in 2010. **Charts 16, 17 and 18** illustrate the value of cash receipts to the region for Total, Livestock and Crop Cash Receipts.

Food Processing

The Southeastern Region is home to the largest food processing facility for swine in the world. Smithfield Foods, located in Bladen County, is also the region's largest employer supporting over 5,000 employees. Three other food processing facilities—Perdue Farms (Richmond County), Mountaire Farms (Robeson County) and second Smithfield Foods facility in Sampson County—make up four of 11 businesses in the region with employment over 1,000 at each location.

In addition to animal food processing, the region is home to several produce processing businesses such as Campbell's Soup Company in Maxton. The company operates one of its largest canning facilities in the country and is a major regional employer and purchaser of regionally grown produce.

Significance of Exporting

Export of agricultural products play a significant and growing role in the State's total economy as well as the economy of the SEDC region. In 2010, North Carolina ranked 12th in the United States in value of exports (NCDOA). According to the NCDOA, "Agricultural exports help boost farm

prices and income while supporting jobs both on the farm and off the farm in food processing, storage and transportation." On July 28, 2011, the Raleigh News and Observer reported that exports make up fully one-third of North Carolina's \$9.6 billion in farm cash receipts. (News and Observer) North Carolina's top exports last year included tobacco, red meats, poultry and soybeans, all of which are grown in this region. Today, with increasing emphasis on farming and processing in a global environment, the growth potential of this sector is important to Southeastern NC. **(See Table 8 for growth in exports)**

As noted by the USDA Agricultural Research Service and the NC Department of Agriculture and Consumer Services, world demand for products exported by North Carolina is growing. Yet, simultaneously, competition from other sources mounts placing incredible emphasis on the ability of farmers in our region to move product quickly and efficiently to the market. Access to roads, rail and ports are critical to the future of agriculture in Southeastern NC.

he Governor's Logistics Task Force delivered a report in August 2010 regarding how to enhance statewide logistics to increase job creation and retention. The report included data on the need for expanded port access for agricultural products. **(See Chart 19)** The report notes that currently, most NC agricultural products leave the country via out-of-state ports (Virginia and South Carolina). (Statewide Logistics Plan, NCDOT website)

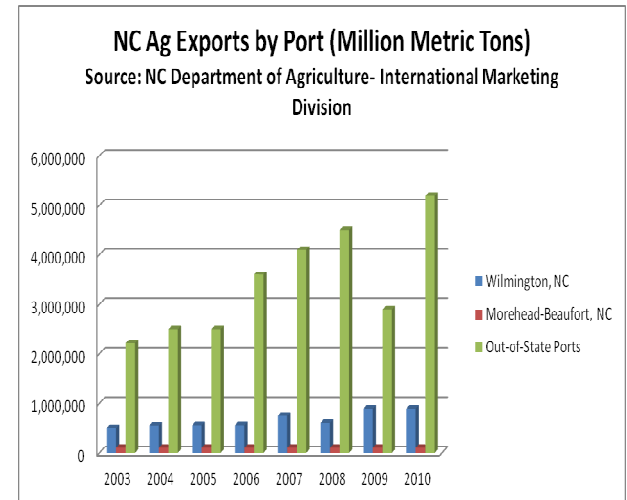


Chart 19: NC Agricultural Exports 2003-2010

Table 8: Growth in Agricultural Exports 2001-2010 (millions).
Source: NC Department of Agriculture and Consumer Services

Commodity	2001	2005	2010	Percent Change 2001-2010
Live Animals and Meat	\$ 171.5	\$ 253.2	\$ 524.7	206%
Poultry	\$ 228.2	\$ 282.2	\$ 249.0	9%
Soybeans	\$ 101.8	\$ 113.1	\$ 267.3	163%
Wheat	\$ 75.7	\$ 126.9	\$ 151.0	99%
Vegetables	\$ 21.7	\$ 22.2	\$ 34.7	60%
Fruits	\$ 13.4	\$ 21.6	\$ 35.1	162%

Regional Profile

The Future of Agriculture in SEDC Region

Indicators point to a solid future for the agriculture in Southeastern NC. Yet, strategies aimed at expanding exports, supporting the family farm, investing in sustainable agriculture and educating our youth on the value of farming as a career are needed. Strategies under Goals 1,2 and 5 of this report include those that enhance connections between farmer to end-user, encourage the growth of agricultural entrepreneurs, support expansion into alternate crops with medicinal and energy values and grow our agricultural tourism sector.

Photo: Charlois Cattle. Photo courtesy of Robeson County Extension Service.



Environment

The condition of our natural environment in the region impacts our public health, economic and recreational opportunities, among many others. Our overall quality of life is, arguably, connected to the quality of the environment in which we live and work. Protection for and wise use of our natural environment—air, land and water resources—are essential to support the economic growth and development of the region while also being sustained for future generations. Included in the section below is a summary of current condition of the region's air, land and water resources, based on available data.

Land Resources

Hazardous Waste Protection

Hazardous waste has been a problem for the region given the number of manufacturing processes historically located here. With the off-shoring of manufacturing that has occurred in last two decades, the instance of non-compliance with hazardous waste standards has sharply declined.

- **EPA Superfund Sites**

The EPA Superfund was established by law in 1980 to address abandoned hazardous waste dump sites. The program is structured to allow the EPA to clean up such sites and to compel re-

sponsible parties to perform cleanups or reimburse the government for EPA-lead cleanups. (EPA website). Like all other states, North Carolina has a number of these sites which have been remediated. There are no active Superfund sites within the SEDC region today. Table 8 shows the number and location by county of remediated sites.

- **Brownfields**

Brownfields are real property, the expansion, redevelopment, or reuse of which may be complicated by the presence or potential presence of a hazardous substance, pollutant, or contaminant. Cleaning up and reinvesting in these properties protects the environment, reduces blight,

Table 9: EPA Superfund and NC Brownfield Sites—SEDC Region.
Source: EPA Superfund Program Website, NCDENR Brownfields Website.

County	Number of Remediated EPA Superfund Sites	Number of Active Eligible NC Brownfield Projects	Number of Finalized NC Brownfield Agreements
Bladen	6	0	0
Brunswick	21	0	0
Columbus	20	0	0
Cumberland	35	1	1
Harnett	8	0	0
Hoke	4	0	0
New Hanover	74	2	4
Pender	8	0	1
Richmond	10	0	1
Robeson	12	0	1
Sampson	5	0	0
Scotland	14	1	2
TOTAL SITES	217	4	10

Regional Profile

and takes development pressures off green spaces and working lands. (NCDENR Brownfields website)

Within the SEDC region, there are a number of Brownfields projects either under contract with NCDENR or in the process of becoming eligible. **Table 9** shows the status and location by county of these projects.

Forest Resources

In 2010, North Carolina completed its first ever assessment of forested land. As a result of this assessment, the Division of Forest Resources now has a strategic plan for the use and sustainability of the State's forested lands. (See www.ncforestassessment.com)

In the SEDC Region there are just over 1.2 million acres of forested land. As is also true for the state, the majority of that—76 percent—is in private hands. (**See Table 10**) Forest resources in the region support wildlife habitat and offer numerous opportunities for recreation. For example, Bladen State Forest, a 33,000 acre forest near Elizabethtown, is operated by the State as a commercial demonstration forest. More than 5,000 acres have been set aside as rare ecosystems and are currently being managed as natural areas (NC State Forest Assessment).

Forest resources also supports jobs and incomes in the region. According to statistics from the NC Employment Security Commission, the SEDC Region is home to 54 of the State's 463 timber and logging business establishments in 2011.

Total wages for this period were just over \$3.3 million and the average weekly wage was \$897.00 making it comparable to the region's higher paying manufacturing jobs and computer analyst occupations. (NCESC, 4th Quarter 2011)

Water Resources

Rivers

Two rivers traverse the SEDC Region- the Cape Fear and the Lumber. The Lumber River is the only State and Federally-Designated river in the region. It stretches over 115 miles from the border of Scotland and Hoke counties to the State's border with South Carolina in Robeson County. In 1989, the State Legislature designated the entire length of the river a Natural



Photo: Canoeing on the Lumber River. Photo courtesy of NC Lumber River State Park.

Table 10: Forest Resource Data 2010 SEDC Region. Source: NC Forest Service, NC Department of Agriculture and Consumer Services.

				Ownership				
County	Total Land Acres	Total Forested Land	Percent Forested	Federal	State	Local	Forest Industry	Private
Bladen	560,000	393,100	70%	0%	8%	0%	9%	83%
Brunswick	547,100	422,000	77%	3%	0%	0%	37%	60%
Columbus	599,600	395,100	66%	0%	0%	0%	34%	66%
Cumberland	418,000	200,000	48%	8%	3%	2%	5%	82%
Harnett	380,800	210,000	55%	3%	1%	0%	3%	94%
Hoke	250,400	171,000	68%	51%	3%	2%	0%	45%
New Hanover	127,300	52,200	41%	0%	10%	1%	0%	89%
Pender	557,300	420,800	76%	0%	10%	0%	28%	62%
Richmond	303,400	233,600	77%	2%	8%	2%	24%	65%
Robeson	607,300	277,200	46%	0%	0%	0%	8%	92%
Sampson	605,100	334,200	55%	0%	2%	0%	4%	95%
Scotland	204,300	137,600	67%	0%	16%	0%	4%	80%
SEDC Total	1,925,400	1,212,500	63%	6%	5%	1%	13%	76%

Regional Profile

and Scenic River. The federal government has designated 87 miles as a National Wild and Scenic River. It is the only blackwater river in North Carolina with this designation. Together with the State Park, the Lumber River provides the opportunity for recreation in swimming, boating and hiking.

The Cape Fear River headwaters are located near Greensboro and the river flows over 200 miles south and east through Fayetteville, Elizabethtown and on to Wilmington. A series of three locks and dams, all located in Bladen County, makes the river navigable from Wilmington to Fayetteville. The Cape Fear is also a blackwater river but does not have the Federal designation carried by the Lumber River. Opportunities for boating, fishing, swimming, canoeing and other recreation are available along its length.

Atlantic Ocean

The counties of New Hanover and Brunswick include 71 miles of Atlantic shoreline and numerous towns that have built upon the ocean amenities. In addition to beachfronts, this coastal region also includes wetland areas which are also major natural attractions for people and wildlife alike. Using the Travel Economic Impact Model (TEIM) the Division of Tourism estimates that the direct economic impact of tourist dollars spent in 2011 for New Hanover County was \$426 million and for Brunswick County was \$418 million ranking them the 9th and 10th in the State for 2011.

Table 11 Employment and Wages by 2-Digit Sector, SEDC Region, 4th Quarter 2011. Source: NC Employment Security Commission

NAICS 2-Digit Sector	Percent of Total Employment	Average Weekly Wage	Total Wages (Millions) for 4th Quarter 2011
Ag/Forestry/Fishing	1%	\$ 549	\$17.3
Mining	0%	\$ 781	\$.80
Utilities	1%	\$ 1,317	\$40.0
Construction	5%	\$ 763	\$175.0
Manufacturing	9%	\$ 998	\$382.0
Wholesale Trade	3%	\$ 913	\$110.3
Retail Trade	13%	\$ 449	\$266.2
Transpo/Warehouse	3%	\$ 752	\$95.3
Information	1%	\$ 804	\$52.3
Finance/Insurance	2%	\$ 891	\$92.0
Real Estate	1%	\$ 604	\$42.5
Prof and Tech Serv.	4%	\$ 1,034	\$228.7
Management	0%	\$ 1,176	\$20.4
Administrative and Waste Services	5%	\$ 517	\$128.9
Educational Services	11%	\$ 710	\$.35
Health Care/Assist.	17%	\$ 800	\$606.9
Arts/Recreation	1%	\$ 373	\$22.5
Accommodations and Food Serv.	10%	\$ 256	\$121.0
Other Services	2%	\$ 487	\$50.8
Public Admin.	9%	\$ 897	\$369.0

Medical Facilities and Healthcare

Our hospitals, clinics, and health care organizations are critically linked to the health of our citizens and to the economic well-being of the region. As our “baby-boom” population ages, more and better quality diagnostic and treatment options are demanded. Medical hospitals and related businesses have responded, developing some of the State’s most advanced facilities available. However, for persons with low-to-moderate incomes, affordability and access remain a challenge, particularly in the interior, rural counties of the region.

Employment

Within the SEDC Region, the Healthcare sector is the major employment sector and was responsible for 17 percent of the regional employment according to the most recent data from the NC Employment Security Commission. **(See Table 11)** The sector generated over \$606 million in total wages during the final quarter of 2011—more than any other sector of employment. Manufacturing at \$382 million and Public Administration at \$369 million place second and third, respectively.

Healthcare which includes long-term care facilities, in-home care providers, hospitals, doctors, dentists, etc., employed over 338,000 persons 4th Quarter 2011. With an expected annual growth rate of 3.2 percent between now and 2016 the healthcare sector will likely remain a dominant sector for the region.

Regional Profile

Average weekly wages, however, are lower when compared to Utilities, Professional and Technical Services and Management positions. Delving into the many occupations within the Healthcare sector reveals that the number of lower paying home health care assistant positions far outnumbers the higher paying medical professional positions which carry significantly higher wages.

Growth in this sector has been driven by a number of factors including the influx of retirees from outside the region seeking needed healthcare, the overall aging of the region's population and increased demand for healthcare services, and the availability of federal and state healthcare programs which provide affordable access to healthcare for the lower-income persons of the region.

Photo: Cape Fear Regional Hospital facility in Cumberland County. Photo courtesy of Cape Fear Hospital System.



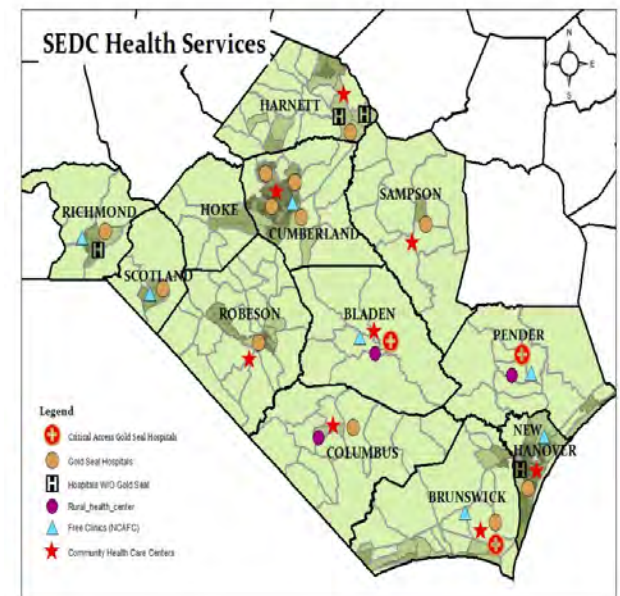
As noted earlier in the *Regional Profile* section of this report, the age distribution in these twelve counties is changing reflecting the aging of the population. In 2010 about a fifth of the region's population—about 65,000 people—were aged 60 and above compared to 15 percent in 2000. The percentage of folks over the age of 80 years has increased by 10,500 in that same period from 3 to 6 percent of the total population. Additionally, the number of persons “middle aged”—40 to 59 years—has dropped significantly as that group is aging forward. These shifts are highly relevant to the economy of the region. First, the demand for health care services specifically tailored to the aged adult is growing. Second, the demand for suitable, affordable retirement options is increasing.

Economic Impact of Healthcare

In addition to the labor income mentioned above, the overall impact of the Healthcare industry on the region is found in the revenue collected by the industry—hospitals, clinics, doctors, etc.—and also in the revenue collected by local suppliers and retail and service revenue related to employee spending. In 2008, the NC Office of Rural Health and Community Care commissioned a study to estimate the overall economic impact of Healthcare on the North Carolina Economy. The study estimated an amazing \$46.3 Billion in direct impact and another \$41.4 in indirect and induced spending.

In 2008 the NC Office of Rural Health and Community Care commissioned a study to estimate the economic impact of healthcare on the NC Economy. Using the IMPLAN model, the study estimated that \$4.8 Billion in Direct, and \$2.3 Billion of Indirect and Induced in healthcare goods and services were produced in the twelve counties of the SEDC Region.

Source: NC Department of Health and Human Services, Health Care and North Carolina's Economy, 2008.



Map 6: Health Services Within the SEDC Region. Source: NC Dept. of Health and Human Services, Hospital websites, NC Association of Free Clinics

Regional Profile

County	Physicians per 10,000 Population 2000	Physicians per 10,000 Population 2010	Dentists per 10,000 Population 2000	Dentists per 10,000 Population 2010	Registered Nurses per 10,000 Population 2000	Registered Nurses per 10,000 Population 2010
Bladen	6.8	6.0	1.5	2.3	54.2	44.8
Brunswick	10.1	10.4	2.4	3.2	43.6	46.3
Columbus	8.8	10.7	2.0	1.7	89.9	73.4
Cumberland	14.6	16.1	3.5	3.6	75.1	86.9
Harnett	6.7	6.5	1.8	1.6	39.8	34.1
Hoke	4.5	2.7	1.5	1.5	30.6	24.1
New Hanover	30.1	31.6	5.8	7.2	129.5	138.5
Pender	5.4	4.8	2.5	3.4	40.4	34.7
Richmond	12.0	11.2	2.5	2.4	81.0	75.3
Robeson	11.3	11.4	2.5	1.9	53.1	70.7
Sampson	7.8	9.0	1.6	1.9	57.2	50.7
Scotland	15.8	17.2	1.5	2.5	75.8	92.0
North Carolina Average	19.8	21.7	6.0	4.4	90.0	97.3

Table 12: Comparison of Healthcare Professionals per 10,000 Population, 2000-2010 Source: NC Department of Health and Human Services

The study estimates that \$4.8 Billion in direct and another \$2.3 Billion of indirect and induced impact were registered in the twelve counties of the SEDC Region. (NC Department of Health and Human Services Study, page 8)

Facilities and Service Availability

Participants in the visioning meetings and the online survey conducted for this CEDS agree that the availability of healthcare has remarkably improved since the 2007 CEDS was prepared. This can likely be attributed to growth in the number of facilities and clinic locations. County Health Departments have established satellite clinics and the major hospitals in the region have continued to invest in expansions at their main and branch locations.

Within the SEDC Region, hospital facilities accredited by the Joint Commission with a “Gold Seal” are available in every county but Hoke. (*See Map 6*) The Joint Commission is a nonprofit organization that accredits more than 19,000 health care organizations and programs in the United States. (Joint Commission website) This is significant in that a majority of state governments have come to recognize Joint Commission accreditation as a condition of licensure and the receipt of Medicaid reimbursement. Several of these—New Hanover Regional Medical Center and Cape Fear Valley Medical Center—provide state-of-the-art cardiovascular, cancer and trauma services. In addition, each county has either a State-supported Rural Health Center, a free clinic staffed by volunteer health profession-

als, or a Federally-qualified Free Health Clinic.

Service Gap Remains

While these facilities provide critical health and wellness and dental services, they do not reach all in need. As shown in Table 13, the number of physicians, dentists and registered nurses are below the North Carolina Average for 2000 in need. As shown in **Table 12**, the number of physicians, dentists and registered nurses are below the North Carolina Average for 2000 and 2010.



Photo: New Nurses—Pinning Ceremony, Richmond Community College, Spring 2012. Photo Courtesy of Richmond Community College.

Regional Profile



Photo Above: Film locations Weyman Chapel—Columbus County



Photo: Town of Dundarrach—Hoke County.



Photo: NC-11 Bridge, Bladen County.

Photos courtesy of NC Film Office.

Film

According to the NC Film Office and an article published July 25, 2012 by the Raleigh News and Observer, July 25, the North Carolina film industry is booming. North Carolina film production for 2012 at \$300 million already exceeds the 2011 record setting number—\$220 million. The record 35 production companies also accounted for a nearly 15,000 job opportunities. (NC Film Office, *Raleigh News and Observer*, July 25, 2012)

Currently under production in various NC counties are three television series, including the new series, *Revolution*, and the award winning series, *One Tree Hill*. Big-budget feature films include *The Hunger Games*, which was filmed entirely in North Carolina and *Iron Man 3*, which was filmed, in part, in Wilmington (New Hanover County). Production companies specializing in commercials are also flocking to North Carolina. Commercials for Mountain Dew, Verizon, Bank of America and Under Armour, among others, have been filmed here in the last year. (*Raleigh News and Observer*, July 25, 2012)

Economic Incentives

As divided as the NC Legislature has been on most issues in the past two sessions, supporting the NC film industry has been one topic they have agreed upon. North Carolina now has some of the most attractive film incentives available in the country.



Photo: Film location in Harrells—Sampson County. Photo Courtesy of NC Film Office.

A new 25 percent film incentive was signed into law by Governor Beverly Perdue. It provides a refundable tax credit based on the direct in-state spending by film companies on goods, services and labor. The spending floor is \$250,000 and the cap has been raised from \$7.5 million to \$20 million. The 6.9 percent corporate income tax on the incentive has been eliminated.

The Effect on Rural Counties

Southeastern NC, specifically New Hanover and Brunswick counties, have the longest standing market for the film industry in the state, and have been the industry anchor. However, film locations today span over 30 counties. The NC Film Office has 3,286 locations in the 12 counties of the SEDC Region listed as potential locations for productions. The television series, *Revolution*, is being filmed in several counties within the SEDC Region in addition to New Hanover.

Regional Profile



Photo: Wrightsville Beach, New Hanover County. Photo courtesy of beachblogspot.



Photo Left: Railroad Museum, Hamlet, NC. Photo courtesy of City of Hamlet.



Photos Above and Left: Servicemen and women from across Fort Bragg and Pope Air Force Base light the Eternal Flame in

a ceremony honoring lives lost September 11, 2001 and servicemen and women killed in Afghanistan and Iraq. Photos courtesy of XVIII Airborne Corp, Ft. Bragg.

Tourism

Economic Impact

Overall in 2011, visitors to and within the state spent \$18 billion, an increase of 8 percent over the previous year. For the first time, state tax receipts as a result of visitor spending neared \$1 billion and local tax revenues totaled nearly \$561 million. (NC Division of Tourism, 2011)

In the SEDC Region, tourist venues stretch from the Brunswick and New Hanover County beaches, the unique meteor-formed lakes in Bladen County inland to Fort Bragg in Cumberland. Tourist spending in each of the twelve SEDC counties was up in 2011 from the 2010 figures, making this one of our regions most important economic drivers.

In 2011, tourism brought over \$1.8 billion to the region in wages, tourist spending, sales and taxes collected, and was responsible for over 17,840 jobs.

Agri-Tourism is Growing

Directly linked to the strength of the agriculture sector in the region, agri-tourism venues are taking hold inspired by entrepreneurs seeking to diversify farming operations. In 2007 there were 42 venues ranging from pick-your-own vegetables, herb farms, hunting sites and wineries registered with the NC Agritourism Office in the Marketing Division of the NC Department of Agriculture and Consumer Services. Participants in



Photo: Lu-Mil Vineyards, Bladen County. Photo courtesy of Klein Consulting.

the visioning meetings and the online survey agree that we need to grow this number and develop better connections between our region's farmers and the institutions. A list of strategies and projects to strengthen tourism is included under **Section 7** of this report.

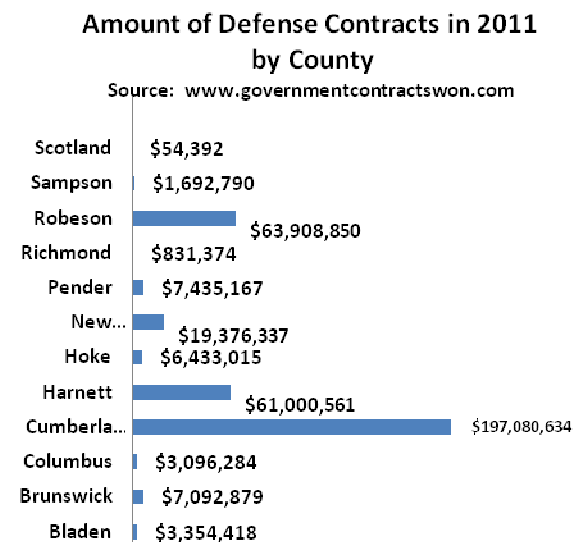
Growing grapes and making wine is a long-term commitment to a community, both financially and physically. New vineyard plantings require three to five years before yielding a full crop, with another one to three years of aging for wine to be ready for sale. Unlike many industries, once vineyards and wineries have been established they are effectively rooted and tied in place – a North Carolina vineyard cannot simply be relocated to another region or outsourced to another country. Wine and grapes are inextricably tied to the soil from which they are grown. Moreover, wine and their products and allied industries diversify local economies and create employment and new market opportunities. (Frank, Riverman and Co., Page 5)

Regional Profile



Photo: New US Army Forces Command Center at Fort Bragg.
Photo courtesy of BRAC Regional Alliance.

Chart 20: Defense Contracts by County, 2011.



Military Presence

The SEDC region encompasses one of the largest, busiest military installations in the world, and the largest in the United States—Fort Bragg. It is located just west of Fayetteville, N.C. and stretches 256 square miles (160,832 acres) into six counties. It includes almost 10 percent of the U.S. Army's active component forces. Fort Bragg is home to the U.S. Army Forces Command (FORSCOM), U.S. Army Reserve Command (USARC), XVIII Airborne Corps, U.S. Army Special Operations Command, the 82nd Airborne Division, Joint Special Operations Command, and Simmons and Pope Army Airfields.

More than 55,000 military service members and about 12,000 civilian personnel work at Fort Bragg, with about 25,000 family members living on post. (Source: www.bragg.army.mil) In addition to the normal growth at the base, significant relocations occurred in 2011 as the U.S. Army Reserve Command and Army Forces Command were moved from Fort McPherson in Georgia under the Base Realignment and Closure legislation (BRAC). As a result of the relocation, 18,200 jobs will be created by 2013. With a new round of BRAC anticipated in 2015, the region is working diligently to plan for both ongoing and future changes in the region.

Economic Impact

According to the garrison command, Fort Bragg has an estimated economic impact of more than

\$26 million per day or \$9.5 billion annually. (Source: www.fayobserver.com) Most recently, statistics from Fort Bragg estimate the direct and indirect impact as more than \$10.9 billion annually and \$29.9 million daily in economic impact is generated in the local economy.

The impact is felt in the region by families, businesses and defense contractors. According to an economic study conducted by the Fort Bragg Regional Alliance (formally known as the BRAC Regional Task Force), FORSCOM alone has a \$30 billion annual obligation authority for defense and other contracts that provides unmatched opportunities for enterprising businesses that want to compete for these dollars. In 2008 locally owned companies received about \$90 million of Fort Bragg's \$500 million in procurement awards, not including subcontract awards. Military spending increased to more than \$371 million in the SEDC Region in 2011. (*See Chart 20*) Numerous defense-related companies have made the move or are in the planning stages to relocate to the Fort Bragg region which includes eight of the counties in the SEDC Region. (Source: www.bractrf.com) Growth is expected to continue to 2030.

"With the additions of Army Forces Command and Army Reserve Command, Fort Bragg will host more general officers than any other Army installation in the country outside the Pentagon."

- Gen. Dan K. McNeill, USA ®, N.C. Military Foundation Chair
Former Commanding General, U.S. Army Forces Command

Analysis of Economic Development Challenges and Opportunities

How We Conducted the Process

Early in the planning, a process was undertaken to develop a clear understanding of the region's strengths, weaknesses, threats and economic development opportunities. Following an initial assessment of these factors input of stakeholders and experts in their fields were sought to gain a more in-depth analysis.

Information was also gathered using several other methods. Included in this were regional public meetings, online surveys, and one-on-one discussions with education, industry and agency representatives. Through this we gained an in-depth understanding of the economic develop-

ment problems and opportunities in the region and identified the strengths and weaknesses posed by both external and internal forces affecting the regional economy.

During the CEDS process, the SEDC Staff worked in collaboration with the three Regional Councils of Government to facilitate regional public meetings with the SEDC CEDS Committee Members and the Ad-Hoc Committee Member as well as additional leaders in the private, public and non-profit sectors to further discuss core assets, strengths, and critical issues and barriers related to economic problems and opportunities. Each regional meeting began with evaluating the strengths, weaknesses, opportunities and

threats identified in the 2007 CEDS to determine what external and internal forces still affects today's regional economy.

SWOT Analysis (Visioning Meetings)

Each of the Regional Councils of Government, working in collaboration with the SEDC, conducted a series of SWOT (strengths, weaknesses, opportunities, and threats) analysis meetings called Visioning Meetings. In all, seven Visioning Meetings were held early in the process at locations making it convenient for local leaders to attend. Participants were asked to help us envision our economic future with special emphasis on the people and other resources needed to help build and sustain that future.

The SWOT analysis was used as a baseline to begin discussion about the Region's vision; goals, objectives & strategies; and potential for future economic growth. The analyses were cross-referenced with the established goals and strategies to make sure that the CEDS process was accomplishing what the community, private sector, and public sector thought were important regarding the Region's strengths weaknesses, and opportunities.

Following on the next page is a summary of the Strengths, Weaknesses, Opportunities and Threats we have identified for the 2012-2017 period:



Photo: LRCOG Region Participants in a Visioning Meeting. Photo courtesy of Klein Consulting.

Analysis of Economic Development Challenges and Opportunities

STRENGTHS

- 1) Human capital, including universities and community colleges;
- 2) Geographic location, easy transportation access, no traffic congestion;
- 3) Available, affordable land and buildings;
- 4) Natural resources and cultural heritage;
- 5) Quality of life – “small town feel”;
- 6) Tremendous Agricultural and forestry expertise;
- 7) Availability of adequate health-care.
- 8) Military presence in the region.

WEAKNESSES

- 1) Lack of skilled, flexible workforce;
- 2) Lack of political clout;
- 3) Transportation, including inadequate public and multimodal options;
- 4) Lack of high-speed internet;
- 5) Access to natural gas;
- 6) Lack of affordable housing;
- 7) Lack of well-paying, high skilled

- jobs “brain-drain”;
- 8) Inadequate *RURAL* healthcare;
 - 9) Failures in K-12 Public Schools.

OPPORTUNITIES

- 1) Biotech commercialization of new products, including agricultural opportunities in bio-fuels;
- 2) Grow impact of film industry in the region;
- 3) Logistics and distribution hubs, related to NC Ports;
- 4) Development of deep water port;
- 5) Regionalism combined with public-private partnerships;
- 6) Expand entrepreneurship and existing businesses around emerging clusters, agriculture and agri-tourism;
- 7) Build upon the Region’s Higher Education Institutions;
- 8) Improve K-12 Education System.

THREATS

- 1) Inadequate, crumbling infrastructure;
- 2) Transportation deficiencies;
- 3) Gaps in the K-12 Education System;
- 4) Still “Two” North Carolina and the gap

is widening;

- 5) Volatile political environment;
- 6) Resource gap in both state and federal programs to assist new or expanding businesses;
- 7) State and Federal level Defense Department cuts;
- 8) Lack of a deep water port.

Observations from Participants

Participants in the Visioning Meetings and the Online Survey came from incredibly diverse backgrounds and offered unique observations on the region, its people and economy. A few of those observations are noted below:

- High levels of education attainment indicate that our region can sustain jobs that require the full spectrum of skill-sets within the workforce. However, our challenge continues to be keeping these graduates in the region after graduation.
- Whether by rail, by road, by sea or sky, the central location of the region make it perfect for logistics and distribution and an optimal point for access to markets and customers, keeping freight and delivery costs low.
- A major asset of the region is the **available, affordable land & buildings** for economic development activities.

Analysis of Economic Development Challenges and Opportunities

- *Our low cost of living low tax rate and low construction cost should make us very attractive.*
- *The region is rich in **agricultural and forestry expertise** creating opportunities for partnerships and collaboration in developing uses for bio-fuels, easier-to-produce food and better healthcare.*
- *The region offers an exceptional quality of life that contributed to a highly desirable place to live, work and play. A moderate climate, a culture rich in history, outdoor recreational opportunities, abundant waterways, quality health care facilities, low cost of living and low construction cost produce an enviable quality of life to attract business and keep skilled workers in the region.*
- *We do need to learn how to partner better with each other and trust each other more. Our economic future may depend on it.*

Consistency with Other Plans

Other government-sponsored materials and plans were considered and incorporated in the analysis of the economic development problems and opportunities and economic clusters within the region. The Committee and Staff reviewed current economic development related materials, including industry target studies, cluster analyses, and other relevant materials available in the Region.

Among these was the recent (2012) *Workforce Needs Analysis and Strategic Plan for the NC Southeast Region* completed by the North Carolina Southeast Regional Partnerships (NCSE). The study identified the NCSE region clusters as: 1) transportation & logistics; 2) aerospace & aviation; 3) renewable & non-renewable energy; 4) building products materials; 5) food processing & agri-business; and 6) metalworking. These clusters identified in the Plan are consistent with the seven key economic clusters that were identified for the SEDC region during the CEDS process.

The *Workforce Needs Analysis and Strategic Plan*, which was funded in partnership with the Economic Development Administration and the North Carolina Workforce Development Board, integrates local workforce strategies with economic development strategies that respond to the cluster needs. The overarching themes and goals are consistent the CEDS Plan for the region and indicates a need for regional approaches:

- 1) collaboration & innovation;
- 2) shared resources—region and statewide;
- 3) seamless connections between K-12 to North Carolina Community College System to University;
- 4) Strong private sector involvement.

EDA Economic Recent Investments in the Region

The Economic Development Administration (EDA) has been an active partner in the SEDC Region for 40 years. As our region has grappled with significant structural and cyclical economic change, EDA has been a critical asset in developing and funding the projects on the following page which have helped to sustain our region.

Analysis of Economic Development Challenges and Opportunities

SOUTHEASTERN ECONOMIC DEVELOPMENT COMMISSION

INVESTMENT LIST 2001-2011

Fiscal Year	Applicant County	Project County	EDA Program	Project Number	Application Short Name	Project Short Description	Total Project Cost	Private Investment	Jobs Created	Jobs Saved	EDA Investment
2010	Bladen	Multi-Co	T9	046906455	Southeastern NC REDC	Workforce Analysis	\$200,000	\$0	0	0	\$100,000
2011	Bladen	Bladen	EA	047906252	Bladen's Bloomin'	Business Incubator	\$1,000,000	\$10,000,000	500	0	\$800,000
2001	Brunswick	Brunswick	PW	0401104747	Brunswick County	Reg Wastewater Trtmt Fac	\$5,618,333	\$15,000,000	375	0	\$1,000,000
2005	Columbus	Columbus	T9	047905517	City of Whiteville	Upgrade WWTP	\$5,602,124	\$8,500,000	0	1239	\$1,500,000
2003	Columbus	Columbus	PW	040105248	Columbus County	WWTP Construction	\$1,817,000	\$50,800,000	197	124	\$860,000
2002	Cumberland	Cumberland	PW	040105110	City of Fayetteville	Sewer Extension	\$2,324,250	\$8,000,000	0	240	\$1,000,000
2011	Cumberland	Cumberland	TA	040606585	Fayetteville PWC	Sustainable development	\$100,000	\$0	0	0	\$50,000
2009	Harnett	Harnett	PW	040106174	Harnett County	Infrastructure Improvement	\$2,183,852	\$56,000,000	100	0	\$1,000,000
2001	Harnett	Harnett	T9	046904961	Harnett County	Economic Adj. Strategy	\$120,000	\$0	0	0	\$60,000
2002	Pender	Brunswick	PW	040105042	Pender County	Sewer Line Improvements	\$1,089,000	\$6,000,000	378	60	\$552,000
2006	Robeson	Robeson	PW	040105765	Robeson Com. College	Workforce Dev. Center	\$3,366,197	\$56,253,700	338	0	\$1,000,000
2002	Robeson	Robeson	PW	040105081	Town of Pembroke	Sewer Extensions	\$1,800,000	\$12,800,000	47	416	\$900,000
2008	Robeson	Multi-Co	STP	048606094	Lumber River COG	Water Resource Study	\$150,000	\$0	0	0	\$100,000
2011	New Hanover	New Hanover	STP	048606529	Cape Fear Future	Marketing materials	\$100,000	\$0	0	0	\$50,000
2012	Richmond	Richmond	PW	040106657	Richmond Com. College	Workforce Trng. Center	\$3,108,429	\$38,000,000	0	435	\$2,038,364
2009	Sampson	Sampson	STP	048606084	Sampson County	Logistics Corridor Project	\$200,000	\$0	0	0	\$100,000
2007	Scotland	Scotland	T9	047905973	City of Laurinburg	Workforce Trng. Center	\$2,600,000	\$27,400,000	230	0	\$1,000,000
2003	Scotland	Scotland	T9	047905330	City of Laurinburg	Sewer main & Pump station	\$700,000	\$3,374,820	50	350	\$350,000
2011	Scotland	Scotland	EA	040106545	Scotland County EDC	Business Incubator	\$1,000,000	\$6,000,000	180	0	\$800,000
TOTALS							\$33,079,185	\$298,128,520	2,395	2,864	\$13,260,364
Total Jobs Created and Retained									5,259		

Economic Clusters

Competitive Advantages, Opportunities and Challenges to Success

What is an “Economic Cluster”?

The concept of “economic clusters” was originally proposed by Dr. Michael Porter, a Harvard Business School professor and Director of the Institute for Strategy and Competitiveness.

With the emergence of global thinking, the demand for higher productivity and greater efficiency by business has grown. Clusters have emerged as the way both policy and practice of economic development occur today.

The definition of Economic Clusters: “Clusters are geographic concentrations of interconnected companies, specialized suppliers, service providers, and associated institutions in a particular field that are present in a nation or region. Clusters arise because they increase the productivity with which companies can compete. The development and upgrading of clusters is an important agenda for governments, companies, and other institutions. Cluster development initiatives are an important new direction in economic policy, building on earlier efforts in macroeconomic stabilization, privatization, market opening, and reducing the costs of doing business.” (Michael Porter. The Institute for Strategy and Competitiveness, Harvard Business School. *Competition and Economic Development*. 2012.)

Our Economic Clusters

After examining the information gathered from the visioning meetings, online survey and follow-up interviews, a group of **EIGHT key economic clusters** were identified for the SEDC Region. Our Economic Clusters are listed below. These established clusters together with a group of emerging clusters referred to as “adaptive capabilities” are our economic drivers for the near future:

- ◆ Advanced Manufacturing
- ◆ Agribusiness
- ◆ Biotechnology
- ◆ Film
- ◆ Healthcare
- ◆ Military Defense
- ◆ Tourism
- ◆ Transportation and Logistics

Advanced Manufacturing: Metalworking

According to the **2011 State of the Region** report issued by NC’s Southeast Economic Development Partnership, the metalworking sector has been a major employer in the region, reaching the peak of its employment in 1997. (State of the Region 2011, page 10) By 2010, given the forces of the economic downturn and loss of area industry, that number had been reduced by half.

Workers in this region have built a reputation as having highly developed metalworking skills, but chances of losing this craft expertise are real. The remaining employers in the region requiring metal workers continue to battle the effects of a slowing economy. In response, the community colleges offering a metal working curriculum have dropped. In addition, where offered, the number of metalworking courses have declined. Compounding this, area high schools provide limited counseling on the potential value of this skilled trade shutting off the pathway from school to career.

Today’s metalworking trade supports industries as variant as healthcare, aerospace, and traditional manufacturing. Metalworking occupations include, among others, sheet metal, paintings and coating, structural metal, machining of parts, welders, metal fabricators, computer-controlled metal machining, and laborers.

Economic Clusters

A partnership between the region's community colleges, existing industry and area High Schools are needed to develop a regionally-based metalworking trade curriculum tailored to the needs of current businesses but flexible enough to meet expected need. A local champion is needed to lead this effort.

Competitive Advantages: The SEDC Region maintains a competitive advantage over other regions of the state due to the following factors:

- 1) Base of existing metalworking employees.
- 2) Location advantage of the region between Wilmington and Charlotte where higher demand for metalworking trade people exists.
- 3) Availability of skilled trades workers to start or support new small businesses in the region.

Threats: Major threats to the continued viability of the Metalworking cluster include:

- 1) Aging of the existing metal workers, fear of losing that knowledge transfer.
- 2) Global Competition and the absence of a deep water port in the region capable of handling shipping which will result from the Panama Canal Expansion.

Opportunities: Opportunities for continued growth of this cluster include:

- 1) Potential increase in demand for this trade from manufacturing reshoring.

Agribusiness – Farming and Food Processing

Agriculture—both in farming and food processing—remains a dominant industry not only in terms of acres under production or, but also in employment and value of product to the region's economy. Continued support of this industry and assistance with diversification strategies to strengthen the industry are needed to ensure employment and income in the region.

Competitive Advantages: The SEDC Region maintains a competitive advantage over other regions of the state due to the following factors:

- 1) Climate conducive to growth (rainfall, temperature, soils),.
- 2) Ease of transportation access in major highways ,rails and water.
- 3) Available land.

Threats: Major threats to the continued viability of the Agri-business cluster include:

- 1) Input prices (fuel, energy and raw materials) continue to rise.
- 2) Regulation is driving costs up.

- 3) The number of farms are declining and the average age of the farm owners is increasing. The majority of farm operators are between 45 and 64, but the fastest growing group of farm operators is those 65 years and older (2007 Census of Agriculture).
- 4) New economic opportunities that can be found in Agritourism/attracting entrepreneurs to the cluster, and in the continued diversification of the economy surrounding farming are needed but not receive the support they need to flourish. Business planning, financial literacy and planning help are needed.

Opportunities: Opportunities for continued growth of this cluster include:

- 1) Diversification through entrepreneurial development such as growing Medicinal crops and developing Agritourism venues.

Biotechnology

The SEDC Region contains excellent opportunities for emerging and established biotechnology companies. Wilmington has one of the largest clusters of contract research organizations (CRO) in the state and nation.

Additionally, the University of North Carolina at Wilmington is developing a \$30 million marine biotechnology research and commercialization center

Economic Clusters

to take advantage of the region's proximity to the coast. Agricultural biotech is growing due to the region's strong agricultural base and network of universities and community colleges engaged in biotech research and business assistance through Bio-accelerators. Industrial biotech holds great potential because of the region's abundant renewable feedstocks for a wide variety of bioproducts. The North Carolina Biotechnology Center has a regional office to lead development in this sector.

Competitive Advantages: The SEDC Region maintains a competitive advantage due to the following factors:

- 1) The active engagement of major universities and community colleges in biosciences.
- 2) The presence of the NC Biotechnology Center in the region.
- 3) Natural resource advantages of the region.

Threats: The major impediment to biotechnology sector today are:

- 1) Competition for funding.

Opportunities: Opportunities for continued growth of this cluster include:

- 1) Emerging agricultural biotech, marine biotech, clinical research and renewable by-product businesses.
- 2) Strong support for entrepreneurs.

Healthcare

Within the SEDC Region, the Healthcare sector is **the major employment sector** and was responsible for 17 percent of the regional employment according to the most recent data from the NC Employment Security Commission. The sector generated over \$606 million in total wages during the final quarter of 2011—more than any other sector of employment. Manufacturing at \$382 million and Public Administration at \$369 million place second and third respectively.

Competitive Advantages: The SEDC Region maintains a competitive advantage over other regions of the state due to the following factors:

- 1) Investment in sector-based workforce training.
- 2) Location advantage of the region between Wilmington and the Research Triangle for easy referral – about an hour's drive in either direction.
- 3) Location advantage for retirement living.
- 4) Robust local healthcare facilities.

Threats: The major impediment to healthcare sector today are:

- 1) Insufficient number of health care professionals to meet the region's demand for service.
- 2) The cost of care and the lack of healthcare

coverage among the population.

- 3) Increased incidence of diabetes in the population. Age-adjusted diabetes death rates in over half of the SEDC counties are twice the state rate. (NC Department of Health and Human Services, 2011).
- 4) Increased incidence of obesity in children aged 5-11. The rate has increased by more than 10 percent in the last four years. (NC Department of Health and Human Services, 2011).

Opportunities: Opportunities for continued growth of this cluster include:

- 1) Continued investment in sector-based workforce training.
- 2) Education programs for youth on healthier eating.
- 3) Connecting schools to local farmers for purchase of produce and vegetables.

Film

For 20 years North Carolina has consistently been one of the top ten location destinations for film, television, and commercial productions in the United States. Southeastern NC, specifically New Hanover and Brunswick counties, have the longest standing market for the film industry in the state, and have been its industry anchor. Over the past two decades, over \$5.2 billion dol-

Economic Clusters

lars have been spent directly by the industry on local goods and services in the four county region alone.

Competitive Advantages: The SEDC Region maintains a competitive advantage over other regions of the state due to the following factors:

- 1) Available buildings and film locations across the region.
- 2) Availability of ready workers to support the industry.
- 3) Strong State support for expanding the industry utilizing business incentives.

Threats: Major threats to the continued viability of the Film cluster include:

- 1) Global competition for recruitment of the industry.

Opportunities: Opportunities for continued growth of this cluster include:

- 1) Emerging regional markets.

Tourism

The SEDC Region's natural scenic beauty, rich history and culture, major military presence, vibrant cities and small towns, and central east coast location make it an ideal travel destination. Direct air access into the state from national and interna-

tional destinations has helped to position it as a preferred international travel destination. Enhanced promotion of the heritage, natural resources and destination will encourage growth in tourism.

Competitive Advantages: The SEDC Region maintains a competitive advantage over other regions of the state due to the following factors:

- 1) Location midway along the East Coast.
- 2) Rich natural and cultural resources.
- 3) Easy transportation access.
- 4) Willing and available workforce.

Threats: Major threats to the continued viability of the Film cluster include:

- 1) Competition from neighboring states.

Opportunities: Opportunities for continued growth of this cluster include:

- 1) Emerging markets.

Transportation and Logistics

The ability to transport raw materials and end products effectively and efficiently is crucial to the economic success of this region. The presence of major four-lane highways, rail, airports and

water transport through ports located on the coast make this group of five counties a prime location for transportation and logistics businesses. Our region ranks further behind the state's major metropolitan areas of Charlotte, the Research Triangle and the Piedmont Triad regions for employment in this sector.

Competitive Advantages: The SEDC Region maintains a competitive advantage over other regions of the state due to the following factors:

- 1) Excellent transportation access.
- 2) Inventory of buildings for warehousing.
- 3) Availability of workers to start or support new small businesses in the region.

Threats: Major threats to the continued viability of the Agri-business cluster include:

- 1) Cluster-specific marketing is needed.
- 2) Global Competition and the absence of a deep water port in the region capable of handling shipping which will result from the Panama Canal Expansion.

Opportunities: Opportunities for continued growth of this cluster include:

- 1) Manufacturing reshoring.
- 2) Economic growth in exporting.

Economic Clusters

Military Defense

The benefits of military spending are evident through the defense contracts valued at more than \$371 million that were awarded in the SEDC Region in 2011—impacting at least one business in every county in the district. Businesses in the region have received over \$3.4 billion in military contracts since 2000. (Source: GovernmentContractsWon.com).

Companies based in Cumberland County, which is home to Fort Bragg, won 50.9% of these contracts. Those in neighboring Harnett County received 26.3% of the region's total awards, while defense contractors in Robeson County captured 11.3%. In 2011, more than 1,300 contracts were awarded in the region. Military spending leads to more production that ultimately creates more jobs. Defense agencies rely on the private sector to build and manufacture its equipment and goods. The result is increased jobs and employment in the private sector. Meanwhile, military personnel learn new skills they may apply to later civilian life. Therefore, military spending also improves human capital in the region.

Competitive Advantages: The SEDC Region maintains a competitive advantage over other regions of the state due to the following factors:

- 1) Fort Bragg is located in the region.
- 2) 10,000+ exiting military personnel entering civilian life annually.

- 3) Defense contractors looking to locate near Fort Bragg.

Threats: Major threats to continued viability of the Military Defense cluster include:

- 1) Potential Defense budget cuts.
- 2) Possible 2015 Base Realignment and Closing plan (BRAC).
- 3) Growth limitations Fort Bragg.

Opportunities: Opportunities for continued growth of this cluster include:

- 1) Ongoing growth and sustainability resulting from the 2005 BRAC.
- 2) Defense growth at Fort Bragg and Camp MackAll resulting from potential 2015 BRAC.

- 3) Rail improvements—Fort Bragg Connector and Pembroke Turn.



Photo: Above—Dedication of the Forces Command Building. Photos courtesy of BRAC Regional Alliance.

Photo: Below—New Forces Command Building at Fort Bragg,



Plan of Action

Plan of Action

The Comprehensive Economic Development Strategy (CEDS) document was created by the Southeastern Economic Development Commission as part of a region-wide effort to assess, define, and accomplish the economic development goals of the region. In turn, the CEDS helps to serve as a guide for regional economic development efforts by outlining the overarching goals, objectives, and strategies formulated by the CEDS Strategy Committee, Regional Councils of Government Ad-Hoc Committees, and the private and public sector leaders in the region.

The plan of action will implement the goals, objectives and strategies of the CEDS in a manner that:

- a) Promotes economic development and opportunity;
- b) fosters effective transportation access;
- c) enhances and protects the environment;
- d) maximizes effective development and use of the workforce consistent with any applicable state or local workforce investment strategy;
- e) promotes the use of technology in economic development, including access to high-speed telecommunications; balances resources through sound management of physical development; and

- f) obtains and utilizes adequate funds and other resources.

The Action Plan will implement the goals, objectives and strategies that were formulated through the regional visioning meetings. Addi-



tional data was collected through an online survey that was distributed to the twelve-county region and is also incorporated in the goals, objectives, and strategies within the Action Plan. The identified goals are designed to:

- a) Build on the region's competitive advantages;
- b) Establish and maintain regional infrastructure;
- c) Create revitalized and vibrant communities;
- d) Develop healthy and innovative workforce; and
- e) Encourage entrepreneurs and small business growth in the region.

On the following pages, the goals, objectives and strategies are listed—including the lead agency, strategic partners, estimated cost and resources, actions and barriers, and the performance measures to be used to ensure progress is made on a consistent basis. In addition to these, a list of vital projects has been identified to ensure these priorities are realized. This list will be reviewed, revised and amended on an annual basis as activities are accomplished and priorities change.

“It’s not the plan that is important, it’s the planning.”

Dr. Graemae Edwards

Goals, Objectives and Strategies

Goal #1: Build on the region's competitive advantages and leverage the marketplace

Objective 1: Identify the region's clusters of economic development that offer competitive advantages.

The development process for the 2012-2017 Comprehensive Economic Development Plan (CEDS) which included visioning (SWOT) meetings and an online survey identified the SEDC Region's competitive economic clusters as: 1) Advanced Manufacturing, 2) Agri-business, 3) Bio-Technology, 4) Film, 5) Military Presence, 6) Healthcare, 7) Film and 8) Tourism. Support for these sectors is needed to ensure continued economic diversification and job growth in the region.

Strategies

1) Advanced Manufacturing: This economic cluster encompasses all high-tech manufacturing business including those such as Building Products, Advanced Textiles, Aviation and Aerospace and Metalworking. Below are specific strategies to enhance the viability of this economic cluster viable in the region.

a) Metalworking: This region was once known for its highly-skilled metalworkers. The loss of manufacturing jobs in the region has reduced their workforce numbers. With the

changes brought about by globalization and the potential for manufacturing reshoring, rebuilding this sector is vital to create jobs in the region. Partnerships between the region's community colleges and existing industry are needed to develop a regionally-based metalworking trade curriculum tailored to the needs of current businesses, yet flexible enough to meet expected need. A local champion is needed to lead this effort.



Photo: Arvin Worker. Photo courtesy of Scotland County Government

Lead Agency: Bladen's Blooming Agri-Industrial

Strategic Partners: Community Colleges, County Economic Developers, K-12 Schools, Industry Partners, Lumber River Workforce Development Board, NC's Southeast

Actions: 1) Convene working group; 2) Deter-

mine best location for regionally-based curriculum to be offered; 3) Develop curriculum; 4) Market to region's High Schools to secure participants.

Estimated Cost: \$30,000

Alignment of Resources: NC Department of Commerce, Rural Center, Golden Leaf Foundation

Barriers/Issues: Marketing to participants

Performance Measures: Group convened; curriculum determined; marketing developed and deployed; students secured for program.

2) Agri-Business: The agri-business cluster is represented by our region's farmers, producers and food manufacturing businesses. This cluster provides the majority of employment and income for the rural counties within this district. In fact, Sampson (#2), Robeson (#5) and Bladen (#6), counties all ranked within the top ten counties statewide in Farm Cash Receipts in 2010. Assistance with diversification strategies to strengthen the industry cluster are needed to ensure future employment and income in the region.

a) Develop Marketing Venues: Retrofit the State Farmer's Market facility in Lumberton to accommodate venues for improved market access for the region's farmers including: 1) a shared use kitchen, 2) a restaurant facility, 3) a livestock sale barn and loading platforms

Goals, Objectives and Strategies

Goal #1: Build on the region's competitive advantages and leverage the marketplace

(currently growers must travel out of the region to sell stock and 4) online marketing connecting buyers to producers in the region.

Lead Agency: County Cooperative Extension Directors/Feast Down East

Strategic Partners: NC Department of Agriculture and Consumer Services, NC Department of Transportation, DownEast Connect, County Extension Directors, Robeson County, City of Lumberton, UNC-Pembroke, area Farmers, area Chambers of Commerce, Tourism Councils, Economic Developers, Area COGs.

Actions: Convene group, secure estimate of improvement costs, develop plans for financing necessary improvements and secure funding.

Estimated Cost: \$30,000 (cost estimates, Plans to finance including grant/loan applications, group staffing).



Photo: Feast DownEast Online Farmer's Market. Photo courtesy of Feast Downeast.

Alignment of Resources: NCDACS, Private Foundations, Local Contributions.

Barriers/Issues: Group Collaboration, Funding

Performance Measures: Group convened, shared leadership developed, cost-estimate secured, financing plans developed.

b) Strengthen the Local Foods Network: Grow our Local Foods Network including our Sustainable Agriculture programs, local farmers markets, community-supported agriculture and food-to-schools in the region and expand program participation.

Lead Agency: County Cooperative Extension Services, Feast Down East.

Strategic Partners: DownEast Connect, Local Farmers, County School Systems, Fort Bragg, NC Department of Agriculture and Consumer Services, regional Universities and Community Colleges.

Actions: 1) Create a Southeastern North Carolina Regional Sustainable Local Food Advisory Council, similar to the statewide Local Food Advisory Council appointed by the legislature in SB 1067; 2) Develop solutions for achieving "GAP" Certification for more local growers to meet this demand; 3) Identify and pursue additional distribution points for local food in Southeastern North Carolina, similar to the Feast Down East Processing and Distribution Center in Burgaw. Plan and find funding to

develop distribution centers in Supply, Lumberton, Jacksonville and Fayetteville.

Estimated Cost: \$150,000

Alignment of Resources: NC Department of Agriculture and Consumer Services, Rural Center, Golden LEAF, Local Partners.

Barriers/Issues: Getting schools, institutions and restaurants to change their food providers, insufficient funding for setting up new distribution points.

Performance Measures: Increased cash receipts by local farmers selling through network programs and facilities.

Photo: Lu Mil Vineyards, Winery and Restaurant, Agritourism Venue, Bladen County.



Goals, Objectives and Strategies

Goal #1: Build on the region's competitive advantages and leverage the marketplace

c) Enhance Agri-Tourism in the Region:

Convene a working group of agri-tourism business and support service providers to assess the successes of and barriers to growth of the region's existing Agritourism businesses. Develop a plan of action to address the barriers and to promote expansion of agri-tourism opportunities in the region which should consider a web portal and conference/expo.

Lead Agency: County Cooperative Extension Directors.

Strategic Partners: Local Tourism Councils, NCDACS, Local Economic Developers, Local Entrepreneurs, Private Railroads, Local Craft Guilds, BioAg Center, UNC-Pembroke.



T. Lengner, Venus Fly Traps in micropropagation lab at Southeastern Community College. Courtesy of the North Carolina Biotechnology Center/Nick Pironio.

Actions: 1) Group convened; 2) Barriers identified and plans made to address these.

Estimated Cost: \$20,000

Alignment of Resources: NCDACS and Private Foundations.

Barriers/Issues: Funding

Performance Measures: Additional agri-tourism businesses served and jobs created.

3) Biotechnology: Biotechnology, a science which is grounded in the study and principals of the biological sciences – cells, proteins and genes. Biotechnology research and manufacturing aids in growing our food, developing medicines and energy-efficient alternative fuels. Investments in Biotechnology enterprises and research are growing across the State. A study conducted by the Battelle Institute for North Carolina cites the impact of direct biotechnology sector revenues at \$41.2 billion and the total economic impact of the sector at \$64.4 billion and creating 226,000 jobs. (Battelle Institute, *Highlights*, page 1) Efforts in the southeast are lead by the NC Biotechnology Center in Wilmington.

a) Grow the region's existing cluster of biotechnology companies, including clinical research companies, and cultivate our biotechnology-related natural, institutional and workforce assets for commercialization in agricultural bio-

technology, marine biotechnology, biodefense, bioenergy, biorenewables, and industrial biotechnology.

Lead Agency: NC Biotechnology Center Southeastern Region.

Strategic Partners: NCSE, UNCW Center for Marine Science and MARBIONC, UNCP, FSU, community colleges, county economic developers.

Actions: 1) Assist companies and entrepreneurs in locating, creating, and expanding companies, including entrepreneurial ventures, in the region, 2) Market the region's natural, institutional, and workforce assets to national and international target audiences.

Estimated Cost: \$250,000 to three distinct targeted marketing efforts for agricultural biotechnology, clinical research, and biorenewables. \$200,000 to build commercialization expertise and to support commercialization activity. \$500,000 to form targeted equity fund for biotechnology-related entrepreneurial ventures.

Alignment of Resources: EDA, Workforce Investment Act and NC Rural Center.

Barriers/Issues: Underdeveloped entrepreneurial community, limited commercialization experience and opportunity, lack of funding for new ventures.

Performance Measures: Investment by biotechnology-related businesses in the region,

Goals, Objectives and Strategies

Goal #1: Build on the region's competitive advantages and leverage the marketplace

number and quality of jobs added by biotechnology businesses, number of start-ups in region.



W. Watanabe and P. Carroll, Carolina Black Sea Bass, UNCW Marine Aquaculture Program. Photo courtesy of UNCW

b) Complete development of the Columbus County Alternate Energy and Agricultural Biotechnology Complex. The Columbus County Economic Development Commission, North Carolina Biotechnology Center Southeastern Office, and Southeastern Community College have partnered

to develop the Columbus County Alternative Energy and Agricultural Biotechnology Complex, an endeavor to develop the county's and the region's biotechnology and biorenewable assets located at the Columbus County Landfill. The Complex concept includes a number of technologies and companies with potentially symbiotic relationships, including the following: 1) landfill methane capture for use in an energy co-generation process also using forestry waste, which then transfers heated wastewater to heat nearby greenhouses for micropropagation and associated agricultural production; 2) pyrolysis to convert municipal waste to fuel for county buses and other vehicles; 3) an energy-producing solar panel farm.

Lead Agency: Columbus County Economic Development Commission.

Strategic Partners: NC Biotech Center Southeastern Office, SEDC, NCSE, Southeastern Community College, NC Commerce, Brunswick Electric Membership Corporation, NC Department of Agriculture and Consumer Services.

Actions: 1) pursue funding for greenhouses and related infrastructure; 2) construct greenhouses, training facility and other infrastructure to allow companies to operate in the Complex; and 3) work with economic development partners to create and execute an external marketing plan to promote the Complex outside the region and state.

Estimated Cost: \$360,000 for greenhouses; \$500,000 for site improvements, heat exchanger, power lines, and natural gas lines; \$50,000 over 2 years to market the complex to additional companies and investors.

Alignment of Resources: Tobacco Trust Fund, Golden LEAF Foundation, EDA, NC Commerce, Workforce Investment Act, NC Rural Center, private investment in energy-generating components.

Barriers/issues: securing funding for initial greenhouses, uncertainty in market for renewable energy credits, competition from other regions and other states.

Performance Measures: number of jobs generated by companies in or related to the Complex, dollars invested by companies in or related to the Complex, energy generated by methane capture, pyrolysis, co-generation plant and solar collection, cost savings for solid waste operations.

4) Film: For 20 years North Carolina has consistently been one of the top ten location destinations for film, television, and commercial productions in the United States. Specifically, New Hanover and Brunswick counties have the longest standing market for the film industry in the state, and have been its industry anchor. Over the past two decades, over \$5.2 Billion dollars have been spent directly

Goals, Objectives and Strategies

Goal #1: Build on the region's competitive advantages and leverage the marketplace

by the industry on local goods and services in the four-county region alone.

a) Enhance State and private sector support of the Film Industry through tax incentives and workforce education and training.

Lead Agency: NC Film Commission

Strategic Partners: Local film commissions, Community Colleges, UNCW and Private Sector Partners.

Actions: 1) extend the state tax incentives or work through the General Assembly's Tax Reform process in 2013 to propagate North Carolina's attractive environment for movie/TV production, 2) Identify education resources needed to increase the industry's workforce in order to keep North Carolina competitive with other states.

Estimated Cost: \$30,000

Alignment of Resources: Golden Leaf Foundation and NC Rural Center.

Barriers/Issues: Collaboration across a very large region with multiple partners.

Performance Measures: Continued film interest in state/region; community colleges adopting programs for film training.

5) Healthcare: Within the SEDC region, health-

care is the second major employer and job growth is expected to continue in this cluster to meet the growing demand for service. Support for this economic driver of our economy is vital, and we must also ensure that a range of accessible and affordable healthcare services are available to support the well-being of our residents and workforce.

a) Grow Healthcare Jobs in the Region.

Build on the existing and successful sector-based approach to the healthcare industry to retain and expand the region's healthcare workforce and physical infrastructure. Our region's Workforce Development Boards are comprised of the region's healthcare leaders. However, the demands of the Workforce System seldom allow the time for this group to lift above these demands and engage in comprehensive regional healthcare planning to support the growth and development of this vital sector. A separate meeting venue where strategies to support the future of our region's healthcare cluster must be developed.

Lead Agency: Local Workforce Development Boards

Strategic Partners: Major healthcare providers in the region, Community Colleges, UNC- Pembroke and Private Sector Partners, Lumbee Tribe, Veterans Affairs Hospital, Womack

Hospital, UNC-Wilmington.

Actions: Establish a region-wide Healthcare Working Group, develop a list of critical issues for deliberation by the group, explore areas of collaboration, feed ideas and recommendations back through the Local Workforce Development Boards to the three sub-regions within SEDC.

Estimated Cost: \$30,000

Alignment of Resources: Lumber River and Cape Fear Workforce Development Boards.

Barriers/Issues: Collaboration across a very large region with multiple partners.

Performance Measures: Group established, critical issues agenda adopted.

6) Military Presence: This economic cluster encompasses the defense-related companies and contractors in the region that compete for the \$30 billion in annual obligation authority for defense contracts from the US Army Forces Command (FORSCOM). With the 2005 Base Realignment and Closure (BRAC) completed and the relocation of the FORSCOM and the US Army Reserve Command (USARC), Fort Bragg is now home to the highest concentration of general officers other than the Pentagon. These moves are bringing thousands of new personnel and defense contractors to the region. The defense industry encompasses 7% of North Carolina's statewide gross domestic product (GDP) and

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Goal #1: Build on the region's competitive advantages and leverage the marketplace

brings \$23 billion into the State annually. (www.ncse.org)

a) Market the region to the Defense Industry:

North Carolina's Southeast and the Research Triangle Regional Partnership have recently partnered with the Fort Bragg Regional Alliance to assist with marketing the Fort Bragg region to the Defense Industry. Performing the essential maintenance and reset of the military in the region represents one of the greatest opportunities for the region and cost savings for the military—including the use of an integrated supply chain, shorter transport distances, skilled labor, favorable business climate and being closer to the customer. Collectively, these steps would help create job opportunities in the military defense cluster throughout the region.

Lead Agency: Fort Bragg Regional Alliance

Strategic Partners: North Carolina's Southeast, Research Triangle Regional Partnership

Actions: Continue marketing the region to the defense industry; Continue to promote the region at defense shows, such as AUSA; Create and revise marketing materials as necessary; conduct surveys of the local companies to identify barriers to their success at winning defense contracts and sub-contracts; Work with the installation, NC Military Business Center, and NC Commerce to identify ways to

improve opportunities for local contractors.

Estimated Cost: \$150,000 annually

Alignment of Resources: Ft. Bragg Regional Alliance, State and local governments

Barriers/Issues: Potential defense budget cuts; Failure to capitalize on the exiting military workforce; State and/or local funding could become insufficient to sustain the effort.

Performance Measures: Additional defense-related contracts, companies, and jobs attracted to the region.

b) Preparation for 2015 Base Realignment and Closure: The region is anticipating the announcement of another round of BRAC in 2015. The region needs to be prepared for the benefits and burdens resulting from BRAC. However, the proposed funding restrictions at the Department of Defense (DOD) will mean that the military must be more efficient and cost effective in the future. Even without a BRAC, this could create growth opportunities at Fort Bragg and Camp Mackall. We need to be actively engaged with our military partners in identifying potential opportunities for such efficiency generating opportunities that also mean positive economic impact for the region. Growth at Fort Bragg can mean growth for the entire region.

Lead Agency: Fort Bragg Regional Alliance

Strategic Partners: Fort Bragg, county govern-



Photo courtesy of Publicdomainphotos.com.

ments, the cities of Fayetteville and Spring Lake, NC Southeast, and the State of North Carolina.

Actions: Work with our military partners to identify growth opportunities presented by a new BRAC or the restricted resource environment. Prepare to respond to the needs of a new BRAC commission by proactively gathering the information; Prepare for a new BRAC commission by reviewing the reams of documentation from BRAC2005.

Estimated Cost: \$150,000 annually

Alignment of Resources: Fort Bragg Regional Alliance, State and local governments, military partners

Barriers/Issues: School over-capacity issues in Hoke and Harnett counties; Completion of

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road improvements; Compatible Land Use issues; Shortage of availability of space on Fort Bragg; the underutilization of Camp Mackall.

Performance Measures: Progress on the remaining action items in the Comprehensive Regional Growth Plan (CRGP) to ensure adequate infrastructure in the counties that surround Fort Bragg; Progress on the Compatible Land Use issues; The region is ready to respond to the efforts of a new BRAC commission; Potential growth opportunities Fort Bragg are identified and promoted to the proper audiences.

7) Tourism: Visitors traveling to and within the state of North Carolina spent a record \$18 billion in 2011, supporting more than 40,000 North Carolina businesses and directly supporting nearly 200,000 jobs all across the state. State and local tax revenues generated as a result of visitor spending totals more than \$1.5 billion annually. Consistently, North Carolina ranks as the 6th most visited state in the United States, and the 4th most popular summer travel destination, behind Florida, California and New York.

a) Expand coastal tourism opportunities in the Cape Fear Region. The Cape Fear region's natural scenic beauty, rich history and culture, a vibrant downtown in Wilmington, charming

small towns, and central east coast location make it an ideal travel destination. Direct air access into the state from national and international destinations has helped to position it as a preferred international travel destination



Photo courtesy of the City of Lumberton.

Lead Agency: Tourism Development Authority

Key Partners: NC Department of Commerce, Chambers of Commerce, Industry Partners

Actions: Create a social media strategy and message for region Details include: 1) generate larger online awareness by developing regional tourism websites, 2) expand key word search on all websites, 3) increase geo-targeted 'pay per click' buys in key North Carolina markets, 4) use Search Engine Marketing and Search Engine Optimization to increase non-paid traffic, 5) generate system to manage online information requests, 6) use email blasts, expand email databases with giveaway incentives, 7) post messages about regional destinations on major free social media sites (Facebook).

Estimated Costs: \$40,000

Resources: NC Department of Commerce

Barriers/Issues: Use of social media takes dedicated effort, research and regular refreshing sites with new content

Performance Measures: Increased visits, tourism expenditures, sales tax revenues, jobs created in hospitality businesses

b) Explore tourism development opportunities for counties along the I-95 corridor and enhance existing agricultural tourism venues in the region.

Lead Agency: County Tourism groups and associations

Key Partners: NC Department of Commerce, Chambers of Commerce, Agriculture Industry Partners—wineries, pick-your-own farms, etc.

Actions: Create a social media strategy and message for region. Details include: 1) generate larger online awareness by developing regional tourism websites, 2) expand key word search on all websites, 3) increase geo-targeted 'pay per click' buys in key North Carolina markets, 4) use Search Engine Marketing and Search Engine Optimization to increase non-paid traffic, 5) generate system to manage online information requests, 6) use email blasts, expand email databases

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Goal #1: Build on the region's competitive advantages and leverage the marketplace

with giveaway incentives, 7) post messages about regional destinations on major free social media sites (Facebook)

Estimated Costs: \$40,000

Resources: NC Department of Commerce, Golden Leaf Foundation

Barriers/Issues: Use of social media takes dedicated effort, research and regular refreshing sites with new content.

Performance Measures: Increased visits, tourism expenditures, sales tax revenues, jobs created in hospitality businesses.

8) Transportation and Logistics: The transportation advantages of a shipping port, major highways, rail, and air transportation assets coupled with the supply of vacant buildings make the region highly marketable to Distribution and Logistics companies. Today, the ability to integrate the means of shipping and have strategically available warehousing is essential to managing costs and remaining competitive in the global marketplace. The presence of the Port at Wilmington enhances the location advantage for export and import of products.

a) Invest in modernizing the State Ports for enhanced global services and market the location advantage and availability of adaptable, vacant warehouse space in the region.

Lead Agency: NC's Southeast Economic Development Partnership/ NC Ports.

Strategic Partners: Region's Rural Transportation Planning Organizations, NCDOT, Region's Economic Developers, Railroad Company Representatives, Private Industry Partner.

Actions: Marketing of port access continues; vacant buildings inventory developed.

Estimated Cost: In-Kind by NCSE

Alignment of Resources: NC's Southeast Economic Development Partnership

Barriers/Issues: None Known

Performance Measures: Additional companies and jobs attracted to the region.

Objective 2: Develop a plan to leverage the region's competitive advantages

Strategies

a) Expand film industry investments in the region, and identify education resources needed to increase the industry's workforce in order to keep NC competitive with other states. Increase workforce with appropriate technical training for industry.

Lead Agency: North Carolina Film Commission

Strategic Partners: NCSE, local film commissions, UNCW and Private Sector Partners, community colleges.

Actions: 1) extend the state tax incentives or work through the NC General Assembly's Tax Reform process in 2013 to propagate NC's attractive environment for movie/TV production; 2) Identify education resources needed to increase the industry's workforce in order to keep NC competitive with other states.

Estimated Cost: \$30,000

Resources: EDA

Barriers/Issues: Collaboration across a very large region with multiple partners.

Performance Measures: Continued film interest in state/region; community colleges adopting programs for film training

b) Promote tourism in the region through increased social media, increased website interaction and promotion to travel writers and media outlets.

Lead Agency: Tourism Development Authority

Key Partners: NC Department of Commerce, Chambers of Commerce, Industry Partners

Actions: Create a social media strategy and message for region Details include: 1) generate larger online awareness by developing re-

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gional tourism websites; 2) expand key word search on all websites; 3) increase geo-targeted 'pay per click' buys in key North Carolina markets; 4) use Search Engine Marketing and Search Engine Optimization to increase non-paid traffic; 5) generate system to manage online information requests; 6) use email blasts, expand email databases with giveaway incentives; 7) post messages about regional destinations on major free social media sites (Facebook).

Estimated Costs: \$40,000

Resources: EDA

Barriers/Issues: Use of social media takes dedicated effort, research and regular refreshing sites with new content.

Performance Measures: Increased visits, tourism expenditures, sales tax revenues, jobs created in hospitality businesses

c) Grow the region's significant, existing industry cluster of clinical research companies, biotechnology companies, and biotechnology-related natural, institutional and workforce assets. The jobs associated with these companies are generally high-paying, clean jobs that require a trained, knowledge-sector workforce. The North Carolina Biotechnology Southeastern Office has created the NC Coast Clinical Research Initiative to grow the region's significant, existing industry cluster of clinical research companies, biotechnology companies, and biotechnology-

related natural, institutional and workforce assets. Three broad areas of need addressed by this economic development initiative include the following: 1) Building community cohesion, 2) Increasing community visibility, recognition, and support in Southeastern NC and beyond with a wider national and international reach with this marketing message, and 3) Increasing and enhancing local clinical trials.

Lead Agency: NC Biotech Center Southeastern Office

Strategic Partners: NCSE, County Economic Developers, UNCW

Estimated Cost: \$50,000 to meet broad initiative goals; \$100,000 to market the industry cluster.

Actions: 1) Work with the existing cluster of companies, investors, healthcare, research and educational resources to convene events and other activities which build community cohesion; 2) Work with clinical research partners to create and execute external marketing plan to promote the cluster outside the region and state; and 3) Work with clinical researchers and healthcare providers to enhance and increase the number of clinical trials conducted locally.

Resources: EDA

Barriers: Insufficient funding, competition from other regions and other states

Performance Measures: Number of jobs re-

tained and generated by clinical research companies, \$ invested by clinical research companies, number of clinical trials conducted in the region.

d) Study the potential for development of a business and industry campus at the intersection of I-95 and I-74 in Lumberton. Determine land availability, infrastructure improvement needs, and designation as a Foreign Trade Zone.

Lead Agency: Regional Tourism Authorities/LRCOG

Strategic Partners: Local Government Recreation Staff, Local Tourism Councils, Area Entrepreneurs, NC State Parks and NCSU.

Actions: 1) Convene group; 2) Develop parameters for study; 3) Secure consultant to conduct study; 4) Study completed, results shared, plan of action pursued.

Estimated Cost: \$50,000

Alignment of Resources: EDA, NC Department of Commerce, Rural Center, Golden LEAF, Local Contributions

Barriers/Issues: Funding

Performance Measures: Collaboration formed, study conducted, knowledge of advantage of this strategic location spread.

e) Facilitate reuse vacant buildings in the region, focusing on overlooked opportunities in good locations close to services and other ad-

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Goal #1: Build on the region's competitive advantages and leverage the marketplace

vantages. Steps to act on this strategy include: 1) Inventory vacant buildings and assess their feasibility for renovation and potential for reuse, and 2) Market and pursue funding for high-potential buildings through the NC Rural Center, NC Commerce and other sources.

Lead Agency: Three Regional Councils of Government

Strategic Partners: NCSE, local economic developers, local governments

Actions: 1) Design inventory procedures; 2) convene local developers and key local stakeholders; 3) gather input from real estate professionals and redevelopers on feasibility and best uses; 4) prepare summary findings and lists of priority properties for each region.

Estimated Cost: \$60,000 for inventory with pre-

liminary assessment of best use and feasibility

Alignment of Resources: NC Commerce, Golden LEAF Foundation, NC Rural Center, EDA

Barriers/Issues: lack of funding for inventory and preliminary feasibility studies

Performance Measures: Dollars invested in vacant buildings, additional jobs created in vacant buildings

f) Study the feasibility, expanding on the work in the **2011 Seven Portals Study**, to establish an Intermodal Transportation Facility at the Laurinburg-Maxton Airport located in the I-74 corridor.

Lead Agency: Laurinburg-Maxton Airport Commission

Strategic Partners: Local Economic Developers, NC Southeast, SEDC

Actions: Secure consultant; conduct study

Estimated Cost: \$30,000

Alignment of Resources: NC Department of Commerce, Rural Center, EDA, Laurinburg-Maxton Airport Commission

Barriers/Issues: Funding

Performance Measures: Feasibility study completed

g) Promote the region's unique cultural heritage. Identify and support cultural tourism opportunities and entrepreneurs in the region.

Lead Agency: Lumbee Tribe/Scotland Games Hosts

Strategic Partners: NC Indian Economic Development Commission, County Officials, Local Chambers of Commerce, Local Tourism Groups, County Economic Developers, Community Colleges and Universities

Actions: 1) Convene group, 2) Determine if outside contractor is needed or if leadership from within the group is sufficient, 3) Assess local and regional resources, 4) define and pursue opportunities for supporting cultural tourism and pursue these.

Estimated Cost: \$20,000

Alignment of Resources: Lumbee Tribe, NCIEDC, NC Department of Commerce

Barriers/Issues: Funding

Performance Measures: Opportunities to promote the unique cultural heritage of the region defined and pursued, markets opened for artisans.

h) Promote the region's natural resources as a potential contributor to the market value of tourism in the region. Promote the region's natural heritage and resources and acknowledge the market value of tourism in the region to encourage continued growth in the industry.

Lead Agency: Regional Tourism Authorities/LRCOG



Photo: Annual canoe race, *Rumba on the Lumba* celebration.
Photo courtesy of the City of Lumberton.

Goals, Objectives and Strategies

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Strategic Partners: Local Government Recreation Staff, Local Tourism Councils, Area Entrepreneurs, NC State Parks, NCSU, NC Commerce

Actions: 1) Convene regional tourism authorities, 2) Update inventories of natural heritage resources, 3) Research and quantify the impact of nature-based tourism in each county and the region, 4) Market the region's natural resources to target audiences.

Estimated Cost: \$20,000 for research (i.e. ECU Institute for Sustainable Tourism)

Alignment of Resources: Tourism Development Authority contributions, foundations

Barriers/Issues: Funding

Performance Measures: Increased tourism visits to facilities in and around natural heritage sites promoted in marketing, and documented revenues from visits.

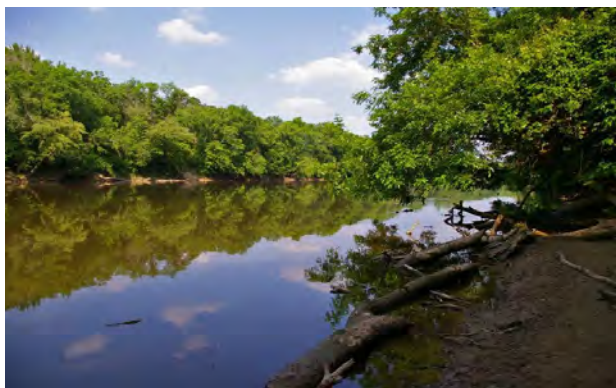


Photo: Cape Fear River, Harnett County

Objective 3: Conduct an analysis that identifies the existing and potential improved place brand for the region.

Strategies

a) Retain a branding consultant to work with the SEDC, Area COGs, area economic development professionals and local governments to conduct a branding analysis to create a stronger regional identity.

Lead Agency: Southeastern Economic Development Commission/NC Southeast Partnership

Strategic Partners: CEDS Regional Ad Hoc Committee, SEDC, Area COGs, NC's Southeast, Local Economic Developers and Local Governments.

Actions: 1) Create a sustained marketing campaign with leadership and budget support from collaborating partners in the region. This campaign would focus on our competitive advantages, high-potential industry sectors and market internationally to encourage foreign companies to locate in the region; and 2) Conduct industry-specific surveys to define what is good about our market, what features led to expansion or relocation decisions by those who have recently located in

the region.

Estimated Cost: \$80,000

Alignment of Resources: EDA and local contributions

Barriers/Issues: The military is seen as the major driver in the region; however there are also other strengths (agriculture, healthcare, etc.) that are often overlooked. A connection between the military and other important drivers in the region can be difficult.

Performance Measures: Collaboration of efforts across the region to strengthen regional identity.

Objective 4: Develop a regional marketing plan

Strategies

a) Partner with and support NC Southeast Economic Development Partnership in their development of materials to market the region.

Lead Agency: NC Southeast Partnership/Southeastern Economic Development Commission

Strategic Partners: CEDS Regional Ad Hoc Committee, SEDC, LRCOG, MCCOG, CFCOG, Local Economic Developers, Local Governments

Goals, Objectives and Strategies

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Estimated Cost: In-kind by NC's Southeast Economic Development Partnership

Alignment of Resources: NC Department of Commerce and local contributions

Actions: 1) NCSE convenes regional group for input on the Annual Marketing Plan

Barriers/Issues: Collaboration over a large geographic region

Performance Measures: Marketing materials and plan developed.

Objective 5: Identify new adaptive capabilities of the regional economy

Strategies

a) Promote the region's biorenewable resources to attract, retain, and foster startup companies that use renewable material sources to manufacture industrial bioproducts and energy/fuel. Viable, renewable biomass resources include the following: woody biomass including wood waste; agricultural products and residues including animal waste; municipal solid waste and county landfill waste; food and beverage production/processing waste; and industrial waste (including industrial CO₂) for remediation with algae. Potential biotechnology-derived products include bioplastics, bioenergy, biolubricants, advanced biofuel, biotextiles, other biomaterials (e.g., for the aerospace industry or advanced medical device industry), animal and fish feed supplements, biopharmaceuticals, and natural products, among many others. The southeastern region of North Carolina is rich with assets suitable to feed the growth of a biorenewable biotechnology industry, based on the region's existing industry base, wide range of biomass feedstocks, agricultural production, and marine biotechnology strengths. Additional resources are needed to complete this work and to convey the outcomes of this work to the world.



Photo: Photo courtesy of the Publicdomainphotos.com.

Lead Agency: NC Biotech Center Southeastern Office

Strategic Partners: NCSE, Biofuels Center of NC, County Economic Developers, NC Department of Agriculture, and NC Forest Service.

Estimated Cost: \$50,000 for comprehensive study; \$100,000 to market the industry cluster.

Actions: 1) Target the region's location advantages for producing renewable bioproducts; 2) Support a range of existing biotechnology-related companies that use biorenewable feedstocks, assist in attracting new biorenewable biotechnology companies to the region, and foster new biotechnology-related entrepreneurial ventures, focused on biomass conversion for biorenewable products; 3) Promote the region's biomass resources as a renewable energy source and an alternative to fossil fuels

Resources: EDA, USDA, USDOE, NC Rural Center

Barriers: Insufficient funding, competition from other regions and other states

Performance Measures: Number of jobs generated by biorenewable companies, dollars invested by biorenewable companies, number of jobs generated by biorenewable companies, and jobs generated by related businesses.

b) Promote the region's forest resources and wood waste (slash) as renewable energy sources and an alternative to fossil fuels. Market the region's forest resources, forestry-related workforce and other assets including quality industrial sites to companies using wood waste for

Goals, Objectives and Strategies

Goal #1: Build on the region's competitive advantages and leverage the marketplace

wood-to-energy operations in Southeastern North Carolina.

Lead Agency: NC Southeast Partnership

Strategic Partners: NC Biotechnology Center, County Economic Developers, NC Ports, NC Forest Service and NC Department of Transportation.

Estimated Cost: \$55 million investment for wood pellet terminal and \$1 million for rail connection to terminal at Port of Wilmington.

Actions: 1) Promote the region's forest resources as a source for wood pellets for international energy production; 4) Improve the capacity of the Port of Wilmington to handle exports of wood pellets and wood chips to international locations.

Resources: EDA, NC Ports, NC Department of Transportation, NC Rural Center

Barriers: Insufficient funding, competition from other regions and other states

Performance Measures: Increased volume of wood pellet exports, number of jobs generated by wood pellet processing companies, and jobs generated by smaller forestry-related businesses.

c) Promote the development of an integrated Local Foods Network represents the opportunity to grow new jobs, create cost savings and improve the health of the region's citizens

through more direct and obvious connections between suppliers and end users. Such a Network could link our region's K-12 schools, hospitals and other institutions, restaurants and individual consumers with locally grown foods.

Lead Agency: UNC-Pembroke, Feast Down East

Strategic Partners: County Schools, County Agricultural Extension Offices, County Health Department, Lumbee Tribe, DownEast Connect, local farmers, regional health providers, restaurant owners and individual consumers, regional Universities and Community Colleges.

Actions: 1) Create a Southeastern North Carolina Regional Sustainable Local Food Advisory Council, similar to the statewide Local Food Advisory Council appointed by the legislature in SB 1067; 2) Develop solutions for achieving "GAP" Certification for more local growers to meet this demand; 3) Identify and pursue additional distribution points for local food in Southeastern North Carolina, similar to the Feast Down East Processing and Distribution Center in Burgaw. Develop distribution centers in Supply, Lumberton, Jacksonville and Fayetteville.

Estimated Cost: \$150,000 for each new distribution point

Alignment of Resources: NC Department of Agriculture and Consumer Services, Rural Center, Golden LEAF, USDA-Rural Development, Lo-

cal Partners

Barriers/Issues: Getting, schools, institutions and restaurants to change their food providers, insufficient funding for setting up new distribution points.

Performance Measures: Increased cash receipts by local farmers selling through network programs and facilities.



Photo: Elizabethtown Farmer's Market. Photo courtesy of Klein Consulting.

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

Highly functional and integrated infrastructure is required to support economic growth and development in the 21st century. To compete successfully in the global economy, our region must have infrastructure systems that are both highly functional and available for strategic use, but also meet the basic needs of the residents of our region.

Objective 1: Identify and upgrade the region's infrastructure assets (transportation, workforce, water/sewer/natural gas, broadband, housing, education, healthcare, green space, access to capital and energy assets).

Strategies

a) Complete regionally-significant high priority transportation projects. Regionally-significant projects are those that will have a major influence on the economy, benefitting more than one county and provide enhanced connectivity to employment centers and better access to local amenities. The Tables below outline these projects for the SEDC Region.

HIGHWAYS

Name	Lead	Estimated Cost	Resource	Strategic Partners
I-140 from US 421 to US 17 south of NC 87 (Brunswick County, connecting to New Hanover County)	NC Dept. of Transportation	\$521,109,000	NC Dept. of Transportation	Wilmington Urban Area MPO
Construct a new bridge south of the Cape Fear Memorial Bridge (CFMB) will add capacity, improve access to the State Port at Wilmington and relieve congestion on the CFMB.	NC Dept. of Transportation	\$1,030,589,000	NC Dept. of Transportation	Wilmington Urban Area MPO
Hampstead (US 17) Bypass-(New Hanover County and Pender County)-Construction of a bypass in the Hampstead area will increase US 17 capacity and improve safety.	NC Dept. of Transportation	\$220,240,000	NC Dept. of Transportation	Wilmington Urban Area MPO
Increase safety and provide better connectivity between the region's employment centers and metropolitan areas elsewhere in the state. An alignment of new I-74 along the US 74 corridor is recommended as it maximizes economic benefit in this high-value strategic corridor and avoids the environmentally-sensitive Green Swamp.	NC Dept. of Transportation	\$1,538,000,000	NC Dept. of Transportation	Cape Fear Area RPO

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

HIGHWAYS (continued)

Name	Lead Agency	Estimated Cost	Resource	Partners
I-74/US 74 Upgrade to Interstate Standards—(New Hanover County, Brunswick County, Columbus County, Robeson County and Scotland County) Improvements are needed to add capacity, improve safety.	NC Department of Transportation	TBD	NC Dept. of Transportation	Cape Fear Area RPO, Lumber River Area, Wilmington Urban Area MPO
Complete all sections of I-73/74 that are missing or below interstate standards. (Most immediate needs are TIP projects R-3421 in Richmond County and I-3801 in Scotland County.	NC Department of Transportation	\$223,618,000	US DOT and NC Department of Transportation	Local RPOs, Region's Local Governments
Widen I-95 and upgrade deficient interchanges	NC Department of Transportation	\$94,115,000	USDOT and NC Department of Transportation	Local RPOs, Region's Local Governments
Widen US 1 to four lanes from Rockingham north to existing four lane section. This project (TIP Project R-2501) completes the widening of US 1 in Richmond County from south of Hoffman to the South Carolina line.	NC Department of Transportation	\$168,730,000	NC Department of Transportation	Local RPOs and Local Governments
Continue Progress of Interstate 295 (Fayetteville Outer Loop)— \$100 million recently approved for I-295.	NC Department of Transportation	\$600,000,000	NC Department of Transportation	Mid Carolina and Lumber RPOs, Fayetteville MPO And Local Governments
NC 24 – Construct a four-lane divided facility, part on new location, connecting Maxwell/Clinton Road in Cumberland County to I-40 in Duplin County.	NC Department of Transportation	\$410,189,000	NC Department of Transportation	Mid-Carolina RPO and Fayetteville MPO
NC 87 – Widen to multi-lanes from US 74/76 in Columbus County to the Elizabethtown Bypass in Bladen County.	NC Department of Transportation	\$234,407,000	NC Department of Transportation	Mid-Carolina RPO and Fayetteville MPO
US 401: Widen to multi-lanes North of Fayetteville in Cumberland County to Fuquay-Varina in Wake County	NC Department of Transportation	\$223,851,000	NC Department of Transportation	Mid-Carolina RPO, Fayetteville MPO and the Capital Area MPO

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

RAIL

Name	Lead Agency	Estimated Cost	Resource	Partners
Pembroke Northeast Connector Project. This project will involve the acquisition of new right of way and construction of new tracks north of Pembroke, NC to create a direct connection between the CSXT's A-line and its SE-line to the Port of Wilmington. The connection is needed to support rail transport from Fort Bragg to the Wilmington Port (Bragg now using Charleston, SC), and expansion of exports from North Carolina businesses including agricultural products.	NC Department of Transportation	\$14 million	NC Department of Transportation	Regions' Regional Transportation Planning Organizations, Local Governments
Extend a rail spur to serve the Pender Commerce Park and other industrial sites on the US 421 corridor.	Pender County	\$1,032,000	NC Department of Commerce, EDA, NC Department of Transportation	NC Southeast, SEDC, NC State Ports
Creating dual use of rail lines by CSX and Norfolk Southern to provide improved access and competitive rates for businesses shipping goods by rail.	NC Department of Transportation	TBD	NC Department of Transportation	Governor's Logistics Task Force, Cape Fear Area RPO, Wilmington Urban Area MPO, East Carolina RPO, Goldsboro MPO
Re-establishing rail service between Whiteville, Tabor City & Conway, SC (Columbus County) Carolina Southern Railroad suspend its service due to unsafe bridges. This rail line provides a critical link between Columbus County industries and Horry County, SC, and is the subject of Horry County's unsuccessful application for 2012 TIGER IV funds for track and bridge rehabilitation.	NCDOT coordinating with Horry County, SC	\$23.2 million	USDOT TIGER funds, NCDOT	Columbus County EDC, Cape Fear Area RPO, NCSE
Restoration of rail lines between Wallace and Castle Hayne (New Hanover County and Pender County) About 27 miles of rail line was taken up in the early 1980's. Restoration would provide rail access from the Wilmington area to the northeast as well as another transportation mode for the region's agricultural products.	NC Department of Transportation	\$65 million	NC Department of Transportation	Cape Fear Area RPO, Wilmington Urban Area MPO, East Carolina RPO, Goldsboro MPO, NC Ports
Complete passenger rail from Fayetteville to Wilmington.	NC Department of Transportation	\$125 million	NC Department of Transportation	Local RPOs, Fayetteville MPO and Region's Local Governments

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

AIRPORTS

Name	Lead Agency	Estimated Cost	Resources	Partners
Laurinburg-Maxton Airport Facility: Complete needed taxiway and hangar improvements to the Laurinburg-Maxton Airport facility to enhance the location as a critical link in shipment of exports.	LM Airport Commission	\$7.5 million	NC Department of Transportation-General Aviation Division, EDA	Local economic development professionals, local governments, NC Department of Transportation—General Aviation Division
Curtis L. Brown Jr. Field - Industrial Development: Land Acquisition & Taxiway Development	Town of Elizabethtown	\$2.3 million	Town of Elizabethtown, EDA, Golden LEAF	Town of Elizabethtown, Bladen's Bloomin

PORTS

Name	Lead Agency	Estimated Cost	Resources	Partners
<p>Improvements to the State Port at Wilmington:</p> <ol style="list-style-type: none"> 1. Maintain dredging of the Cape Fear Navigation Channel 2. Terminal operating technology, gate and roadways 3. 'Last mile' improvements (not including Cape Fear River Bridge) 4. Inland port and distribution improvements 	ALL: NCDOT/NC State Ports Authority	<p>Not Available</p> <p>\$8.2 million</p>	NC Department of Transportation, EDA, public-private financing	NC Department of Transportation, NC Department of Commerce, US Army Corp of Engineers, NC Department of Agriculture and Consumer Services, NC's Southeast, SEDC, Local Economic Developers, Private Sector Business Exporters

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

WATER AND SEWER

Name	Lead Agency	Estimated Cost	Resources	Partners
Hoke County Regional Sewer System: Phase 1-B to support and promote quality growth occurring in close proximity to Fort Bragg, and between Raeford and Fayetteville. Phase 1-A will serve the US401 corridor, including two new medical facilities - First Health of the Carolinas and Cape Fear Valley - creating 300 new jobs in Hoke County over the next five years. Hoke County will complete phase 1-A of the regional sewer system project by fall of 2012.	Hoke County	\$1.6 million (Phase 1-A) \$14.6 million (Phase 1-B)	Hoke County, NC Rural Center, CDBG, Golden LEAF, EDA, Lumber River Electric Membership Corporation	Hoke County, First Health of the Carolinas, Cape Fear Valley
Linden Water & Sewer District	Cumberland County	\$8 million	USDA, NCDENR	Cumberland County, Town of Linden
Vander Water & Sewer District	Cumberland County	\$7 million	USDA, NCDENR	Town of Vander, Cumberland County
Grays Creek Water & Sewer District	Cumberland County	\$10 million	USDA, NCDENR	Cumberland County
Cedar Creek Water & Sewer District	Cumberland County	\$10 million	USDA, NCDENR	Cumberland County
Town of Elizabethtown: Water and sewer improvements to serve new hospital facility between Mercer Mill Road and Executive Drive	Town of Elizabethtown	\$1.18 million	Town of Elizabethtown, EDA, NCDOC, USDA	Town of Elizabethtown, Bladen County, Hospital, Bladen's Bloomin
Water & Sewer Improvements	Pender County	\$5 million	Pender County	
Town of Elizabethtown: Sewer Plant Expansion and Upgrade	Town of Elizabethtown	\$5 million	USDA, EDA, NC Rural Center	Bladen County
Industrial Park Infrastructure	Robeson County	\$3 million	USDA, NCDOC, Golden LEAF, NC Rural Center, Robeson County	Town of St. Pauls, Robeson County
Town of Pembroke Wastewater Treatment Upgrades	Town of Pembroke	\$2 million	USDA, Golden LEAF, NC One Fund, Town of Pembroke, EDA, Robeson County	Robeson County, Town of Pembroke

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

INDUSTRIAL PARKS AND BUSINESS INCUBATORS

Name	Lead Agency	Estimated Cost	Resources	Partners
Cedar Creek Business Center Shell Building	Cumberland County	\$2.75 million	NCDOC, County Gov't	CCBC, Cumberland County
Mega Site Development	Cumberland County	\$35 million	USDA, Rural Center, EDA, Golden LEAF and local Gov't	Cumberland County, City of Fayetteville
Southeast Regional Business Campus: industrial park development	Scotland County Economic Development Corporation	TBD	EDA, City of Laurinburg, Scotland County, NC Rural Center, Golden LEAF	Local government, NC's Southeast, SEDC
Small Business Innovation Center (SBIC)	Scotland County Economic Development Corporation	\$1.1 million	EDA, Golden LEAF, Scotland County EDC	Local government, SEDC
Expand Incubator at Brunswick Community College Workforce Training Center	Brunswick Community College	\$375,000	EDA, USDA, Golden LEAF	Brunswick County EDC, Brunswick County
Industrial Shell Building: Burgaw	Pender County	\$2 million	Pender County	
Business Incubator	Columbus County	\$1.2 million	Golden LEAF, EDA, Columbus County	Columbus County EDC
I-40 Exit 348 Industrial Park	Sampson County	\$2 million	Sampson County, NC Rural Center, Golden LEAF, CDBG, USDA, NCDOC, EDA	Sampson County, Sampson County EDC
COMtech Industrial Incubator	COMtech	\$1.6 million	COMtech, Golden LEAF, EDA	Robeson County, SEDC
Delco Industrial Park: infrastructure	Columbus County	\$250,000	EDA, Columbus County	Columbus County EDC

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

INDUSTRIAL PARKS AND BUSINESS INCUBATORS (continued)

Name	Lead Agency	Estimated Cost	Resources	Partners
I-40 Exit 355 Industrial Park	Sampson County	\$9 million	Sampson County, NC Rural Center, Golden LEAF, CDBG, USDA, NCDOC	Sampson County, Sampson County EDC
I-40 Exit 364/NC-24 Industrial Corridor	Sampson County	\$10 million	Sampson County, NC Rural Center, Golden LEAF, CDBG, USDA, NCDOC, EDA	Sampson County, Sampson County EDC
UNCP Entrepreneurship Incubator	University of NC at Pembroke	\$ 1.9 million	UNCP Foundation, Golden LEAF, EDA	UNCP, SEDC, Town of Pembroke
Columbus Alternative Energy and Biotechnology Center: infrastructure	Columbus County	\$100,000	EDA, Columbus County	Columbus County EDC, NC Biotechnology Center - SE Office
Natural Gas to the Elizabethtown Industrial Park	Bladen's Bloomin' Agri-Industrial, Inc.	\$5 million	Bladen County, Town of Elizabethtown, State & Federal Funding	Bladen County, Bladen's Bloomin', Town of Elizabethtown
Industrial Park Improvements: US 421	Pender County	\$1.5 million	Pender County, EDA, Golden LEAF	Wilmington Development, Inc., Pender County

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

Objective 2: Develop multi-modal transportation plans that address existing and future year capacity deficiencies.

Strategies

a) Continue existing efforts to develop multi-modal Comprehensive Transportation Plans for all counties in the region.

Lead Agency: Region's Councils of Government, Regional RPOs and MPOs

Strategic Partners: Local Governments, Wilmington and Fayetteville Metropolitan Planning Organizations, Capital Area Metropolitan Planning Organization, North Carolina Department of Transportation, WAVE Transit.

Actions: Continue efforts to assist in upgrading the regional transportation plans

Estimated Cost: In-Kind by Regional Councils of Government as funding allows.

Alignment of Resources: Regional Councils of Government

Barriers/Issues: Lack of additional funds for Transportation Planning in the current budget environment.

Performance Measures: Approved Comprehensive Transportation Plans for each County in

the Region.

b) Secure funding for the Wilmington Multimodal Transportation Center to be located downtown between 3rd and 4th Streets. Such a facility would allow easy transfers between rail, motor vehicle, bicycle, bus and pedestrian modes of travel in a location convenient to downtown.

Lead Agency: WAVE Transit

Key Partners: Wilmington MPO, City of Wilmington, Wilmington Downtown Inc.

Actions: 1) develop schematic plans for facility; 2) explore interim uses for site acquired for the Center; 3) Identify potential financing alternatives.

Estimated Cost: \$36 million

Alignment of Resources: NCDOT, Federal Transit Administration, City of Wilmington, New Hanover County, public-private financing

Barriers/Issues: Funding

Performance Measures: Completion of Multimodal Transportation Center, use by transit riders.

Objective 3: Identify whether water, sewer and natural gas infrastructure can accommodate future growth.

Strategies

a) Work with the region's economic developers to Identify information and mapping resources available from natural gas suppliers in the region. Using this information, assess available capacity and plan for completion of utility extensions necessary to serve high-priority industrial corridors.

Lead Agency: Region's Economic Developers

Strategic Partners: Local Governments, SEDC and Region's COGs

Actions: Gas Utility infrastructure identified

Estimated Cost: None Known

Alignment of Resources: None needed

Barriers/Issues: Information considered proprietary by natural gas providers.

Performance Measures: Case-by-case project information more likely the result.

b) Complete extension of natural gas service to Progress Energy's Sutton Steam Plant, converting this plant's three coal-fired boilers to gas. This priority project, which will assure compliance with air quality standards in Wilmington MSA, should be carried out in a manner that maximizes the benefit to prime industrial sites.

Lead Agency: Piedmont Natural Gas (PNG)

Key Partners: Progress Energy, DENR Air Quality, Wilmington MPO, Brunswick EDC

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

Estimated Cost: \$217 million

Source: Piedmont Natural Gas

Barriers: Difficulties with siting easements relative to prime industrial sites

Performance Measures: Project completed on schedule (June 2013), dollars of business investments, number of jobs added by PNG customers along route of pipeline, air quality improvements at Progress Energy's Sutton plant.

c) Build on the work of the LRCOG to develop digital mapping capacity for water and sewer for systems in the region without digital mapping capacity.

Lead Agency: Regional Councils of Government

Strategic Partners: Local Systems Owners, County Economic Developers, Rural Center

Estimated Cost: \$150,000

Alignment of Resources: EDA, Rural Center, Local Contributions

Actions: Potential systems identified and served

Barriers/Issues: Funding

Performance Measures: Changes to Local Land Use Ordinances

d) Support the development of regional water and sewer systems. Regional collaborations offer an economy of scale to operations and can help address unserved areas and support economic development activity.

Lead Agency: Regional Councils of Government

Estimated Cost: \$60,000

Alignment of Resources: NC Department of Environment and Natural Resources

Actions: Apply for 205(j) Grants from the North Carolina Department of Environment and Natural Resources (NCDENR)

Barriers/Issues: Agreement from local govern-



Photo: Director Jim Perry of the LRCOG leads the Ellerbe Town Board in a discussion of progress on their regional sewer connection with the City of Rockingham.

ments to participate; Grant approval from NC Department of Environment and Natural Resources

Performance Measures: Changes to Local Land Use Ordinances

e) Identify and address needs of utility systems facing moratoria and Standard Orders

of Consent limits on new users.

Lead Agency: Regional Councils of Government

Key Partners: Local municipal and county governments, water/sewer utility providers, funding consultants

Actions: 1) Examine Moratorium and SOC list to determine nature of issues, 2) identify priority localities, likely those with partial funding in place, 3) update preliminary engineering reports or find funding for preliminary engineering, 4) seek regional solutions, 4) pursue Small Cities CDBG Infrastructure and other funding for high impact improvements.

Estimated Costs: \$15,000 for COG staff work, \$30,000 for PERs, \$3,500/application

Alignment of Resources: Small Cities CDBG

Barriers: Funding

Performance Measures: Number of systems able to add new users, number of jobs generated by new users

Objective 4: Develop and pursue the implementation of intermodal connectivity between roads, rails and ports to support expanded exports of regional commodities.

Strategies

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

a) Implement the recommendations of the *State Logistics Study* for the region.

Lead Agency: NC Department of Transportation

Strategic Partners: Rural Transportation Organizations, SEDC, North Carolina Departments of Agriculture and Commerce, local economic developers and planners, Cooperative Extensive County Directors, and transportation providers – rails, truck carriers and port officials.

Estimated Cost: None Known

Alignment of Resources: None needed

Actions: Study recommendations implemented

Barriers/Issues: Funding

Performance Measures: List of Intermodal Transportation Priorities for Export of Good

Objective 5: Strategically expand the region's telecommunication and broadband infrastructure to support sustainable and competitive growth

Strategies

a) Develop a comprehensive assessment of the current status of broadband service in the region including planned public and private investments.

Lead Agency: NC's Broadband- NC Department of Commerce

Strategic Partners: Lumber River Workforce Development Board, Community Colleges, UNC-Pembroke, UNC-Wilmington, Fayetteville State University, K-12 Schools, Regional Councils of Government, SEDC, telecommunication service providers

Estimated Cost: In-Kind by NC Broadband

Alignment of Resources: NC Department of Commerce

Actions: Assessment conducted and results shared

Barriers/Issues: None Known

Performance Measures: Assessment developed; needs identified and shared

b) Organize technology planning teams within the region with inclusive, cross-disciplinary membership. The teams will explore opportune ties to optimize return on public and private investment in broadband infrastructure and capabilities.

Lead Agency: Regional Councils of Government

Strategic Partners: local governments, community colleges, Community Development Corporations, UNCW, UNC Pembroke, Fayetteville State University

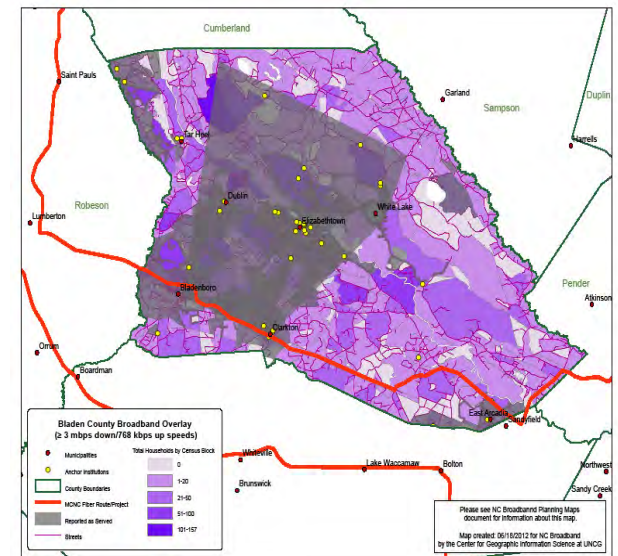
Estimated Cost: \$15,000, \$5,000/ per region

Alignment of Resources: EDA, NC Commerce, USDOL, USDA

Actions: Convene key stakeholders to serve as champions for planning teams

Barriers/Issues: Resistance from Broadband providers,

Performance Measures: Number of individuals engaged in teams, number of completed plans.



Map 7: Bladen County showing extensive areas of the county (not shaded grey) without high speed internet service. Map courtesy of NC Broadband.

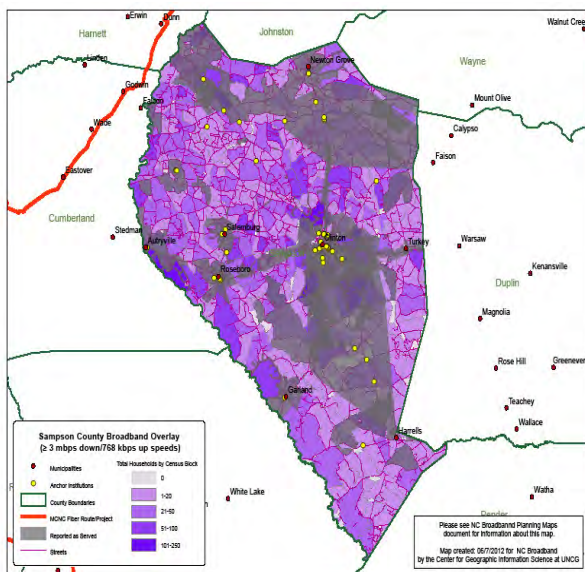
Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

Objective 6: Develop plans for equitable and affordable housing choices.

Strategies

a) Develop a public/private Regional Housing Working Group: The goal of the group should be to expand housing choices available to families in the region. Conduct an inventory of available and affordable housing choices based



Map 8: Sampson County Broadband Coverage. Map Courtesy of NC Broadband.

upon the demographic profile of each county within the region. Conduct an inventory of housing-related programs and organizations within the region. Examine the potential of non-profit groups in the region to develop housing projects. Employ best practice methods to increase and coordinate foreclosure prevention, mitigation and reoccupancy efforts. Examine housing choices surrounding the region's job centers and commuting patterns to understand the impact of extended travel to work on affordability. Analyze study recommendations and develop an Action Plan.

Lead Agency: Regional Councils of Government

Strategic Partners: Homebuilders Association, Realty Community, Fayetteville Area MPO, Lumber River RPO, Capital Area MPO, Region's housing assistance providers, Community Development Corporations

Estimated Cost: \$90,000

Alignment of Resources: NC Department of Commerce, Local Contributions

Actions: 1) Working Group convened; 2) Inventory conducted; 3) Gaps and best practices identified; 4) Information shared.

Barriers/Issues: Funding

Performance Measures: Inventory developed, access to affordable housing expanded

b) Improve coordination of housing rehabilitation programs with weatherization programs and energy efficiency initiatives to make effective use of funds.

Lead Agency: Regional Councils of Governments

Strategic Partners: CDBG Entitlement CDBG staff (Cities of Wilmington and Fayetteville), Holland Consulting Planners and other Small Cities CDBG consultants, Four County Community Services-Weatherization Program, NCHFA, NC Commerce Assistant Secretary Jonathan Williams, Progress Energy, NC Electricities, PWC of Fayetteville and Local Housing Authorities

Estimated Cost: none, except for staff time

Alignment of Resources: NC Commerce Division of Community Investment and Energy,

Actions: 1) convene working group to frame issue, 2) explore benefits of coordination with Four County director and NC Commerce staff, 3) propose possible pilot projects, 4) ultimately propose recommendations for coordinating programs.

Barriers/Issues: Lack of interest in coordination, practical difficulties coordinating programs on different funding cycles

Performance Measures: Number of homes rehabilitated with coordinated funding; additional funds leveraged.

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

Objective 7: Enhance the capacity of the N.C. Ports to meet the needs of North Carolina Businesses in the changing, global economy

Strategies

a) Improve the Cape Fear Navigation Channel to meet vessel requirements.

Lead Agency: NC Department of Transportation and NC State Ports Authority

Strategic Partners: Army Corps of Engineers, county economic developers, DENR-Coastal Management.

Estimated Cost: to be determined from U.S. Army Corps of Engineers (USACE) feasibility study

Alignment of Resources: NCDOT, NC Commerce

Actions: complete USACE study, follow-up on recommendations

Barriers/Issues: Funding, permitting, potential groundwater intrusion

Performance Measures: Completed turning radius, increased shipping volumes

b) Improve terminal operating technology, gate and roadway configurations to facilitate

on-terminal freight movement.

Lead Agency: NC Department of Transportation/ NC State Ports Authority

Strategic Partners: City of Wilmington, Wilmington Metropolitan Planning Organization

Estimated Cost: \$8.2 million

Alignment of Resources: NC Department of Transportation, EDA

Actions: Complete engineering for specific projects, initiate construction

Barriers/Issues: Funding

Performance Measures: Improved travel time, loading, unloading.

c) Upgrade last mile and interstate grade highway access to reduce time and congestion.

Lead Agency: NC Department of Transportation/ NC State Ports Authority

Strategic Partners: City of Wilmington, WBD and other county economic developers, Wilmington Metropolitan Planning Organization

Estimated Cost: Not available.

Alignment of Resources: NC Department of Transportation

Actions: complete detailed plans with Wilmington MPO, coordinate with plans for new bridge



Photo courtesy of Publicdomainpictures.net.

Barriers/Issues: Funding, delays in permitting, constructing improvements, difficulties citing improvements with minimal impact on nearby neighborhoods

Performance Measures: Improved travel times, decreased congestion on local streets

d) Improve rail connectivity and competitive service to expand market reach for businesses in the region and throughout the state. Specific proposed improvement priorities include:

- 1) Providing Dual Class 1 rail service to the Port of Wilmington.
- 2) Completing the Pembroke Northeast Connector Project, (the 'Pembroke Turn') .
- 3) Expanding the reach of short lines serving the

Goals, Objectives and Strategies

Goal #2: Establish and Maintain a Robust Regional Infrastructure

region, evaluating costs and economic benefits of establishing rail service between Whiteville and Leland, Chadbourn and Bladenboro and other potential projects.

Lead Agency: NC Department of Transportation

Strategic Partners: NC's Southeast Partnership, county economic developers

Estimated Cost: to be determined

Alignment of Resources: NC and US Departments of Transportation

Actions: pursue rail-related recommendations in NC Maritime Study

Barriers/Issues: Insufficient funding for improvements, difficulties getting CSX and Norfolk Southern to agree to dual use arrangements

Performance Measures: Increased shipping by rail, increased efficiency

e) Address concerns of the US Department of Defense for improving logistics movements to the NC Ports and Sunny Point. Providing more efficient access for moving supplies to and from the region's military bases is critical to serving and retaining North Carolina's military presence.

Lead Agency: NC Department of Transportation

Strategic Partners: Military Growth Task Force, NC Defense Logistics Initiative staff, Wil-

mington MPO, Cape Fear RPO, Fayetteville MPO, Department of Defense, MCCOG, CFCOG

Estimated Cost: to be determined

Alignment of Resources: NC Department of Transportation, US Department of Defense

Actions: review recommendations from NC Maritime Study, NC Defense Logistics Initiative, find funding for key priorities

Barriers/Issues: Funding to implement improvements

Performance Measures: Volume of shipments moving through the Port of Wilmington

f) Improve distribution capabilities to attract new shippers to North Carolina and provide more competitive inland pricing for moving goods for North Carolina-based suppliers and manufacturers. Competitive inland transportation costs are a critical factor in retaining and growing business in North Carolina.

Lead Agency: NC Department of Transportation/ NC State Ports Authority

Strategic Partners: NCSE, county economic developers

Estimated Cost: Not available

Alignment of Resources: NC Department of Transportation

Actions: Follow up on recommendations in the NC Maritime Study.

Barriers/Issues: Funding

Performance Measures: Increased use of State Ports by North Carolina businesses.

g) Advance a Virtual Logistics Village Initiative to leverage the region's assets, including the Port of Wilmington, Wilmington International Airport (ILM), industrial sites suited for distribution and logistics in the Port Enhancement Zone, and the highway network connecting them.

Lead Agency: NC State Ports Authority/NC's Southeast Economic Development Partnership/SEDC/Wilmington Business Development

Strategic Partners: BEDC, CEDC, county and municipal governments, Wilmington MPO, UNCG faculty assigned to pursue SE region Logistics Village

Estimated Cost: to be determined

Alignment of Resources: to be determined

Actions: 1) Convene working group to frame recommendations, 2) establish entity to prepare management plan and organize support, 3) formalize relationships and roles

Barriers/Issues: Insufficient support to get beyond concept discussions

Goals, Objectives and Strategies

Goal #2: establish and maintain a robust regional infrastructure

Performance Measures: Number of businesses locating in region as a result of Logistics Village, number of jobs created in region

h) Pursue completion of a Feasibility Study on a deep water port in North Carolina as recommended by the US Army Corp of Engineers. This assessment should look at the long-term challenges facing North Carolina Ports in light of changes in international shipping, especially the size of post-Panamax container ships, and future prospects for the Port of Wilmington.

Lead Agency: NC Department of Transportation

Strategic Partners: County economic developers, NC's Southeast Economic Development Partnership, Regional Councils of Government, Brunswick County, City of Wilmington and other local governments in vicinity of alternate sites

Estimated Cost: \$10 million

Alignment of Resources: NC Department of Transportation, EDA

Actions: 1) Form steering committee to oversee assessment and coordinate with NCDOT

Barriers/Issues: Other ports along the Atlantic and Gulf Coasts have a head start in preparing for new vessels and may have competitive advantages.

Performance Measures: NC Department of Transportation decision on course of action



Photo courtesy of Publicdomainphotos.com.

Goals, Objectives and Strategies

Goal #3: Create Revitalized and Vibrant Communities

Our communities are where we work, live, raise our families and join with one another to create a better future for those that will follow us. How our communities develop, how we move around within them, enjoy recreational opportunities, and become engaged in the civic process that governs them are critical supports to the economic development of our region. The objectives and strategies below are focused on creating revitalized and vibrant communities within our region.

Objective 1: Promote environmentally sustainable patterns of development

Strategies

a) Identify development corridors within the region and connect county planning to support development within these corridors when they cross county boundaries. Explore policies for guiding growth and optimizing infrastructure investment. This strategy should explore the potential for mixed-use activity centers and hubs aligned with long-range plans for transit service.

Lead Agency: Regional Councils of Government/

Lower Cape Fear Sustainable Communities Consortium/Sustainable Sandhills

Strategic Partners: Local government planning staff and managers, Metropolitan and Rural Transportation Organizations, Rural Land Use Advisory Commission, Fort Bragg Regional Alliance,, NC Department of Commerce

Estimated Cost:\$30,000

Alignment of Resources: In-kind staff

Actions: 1) Convene local planners to scope out concept and tasks, 2) prepare map combining current local governments land use plans, 3) assess potential corridors, 4) explore potential policies for guiding land use, transportation and utilities along select corridors

Barriers/Issues: Insufficient interest in multi-jurisdictional coordination, lack of staff time to devote to the effort, lack of consensus on vision for preferred development policies

Performance Measures: Number of corridors with completed multi-jurisdictional plans, number of local governments adopting plans

b) Provide an **Educational Forum** for the region's planners, economic developers, educators and elected officials on sustainable development and management practices for the region including Voluntary Agriculture Districts, Agricultural Zones, Green Growth Tool Box and others.

Lead Agency: County Cooperative Extension Directors

Strategic Partners: Local governments, economic developers, educators and elected officials and environmental organizations

Estimated Cost: \$15,000

Alignment of Resources: NC Department of Agriculture

Actions: Provide Forum

Barriers/Issues: None Known

Performance Measures: Forum convened; increase in program participation, additional farmland preserved

c) Identify Industrial Opportunity Areas as prime sites to encourage job growth in locations with minimal impact on the environment. This strategy should recommend infrastructure improvements, policies and incentives for businesses to choose these locations.

Lead Agency: Regional Councils of Government/ Lower Cape Fear Sustainable Communities Consortium/Sustainable Sandhills

Strategic Partners: NC Southeast Economic Development Partnership, County economic developers, municipal and county governments

Estimated Cost: \$20,000 per region

Alignment of Resources: in-kind staff time

Actions: 1) Convene stakeholders, 2) set criteria

Goals, Objectives and Strategies

Goal #3: Create Revitalized and Vibrant Communities

for GIS-based analysis, 3) explore potential policies to protect areas for industrial use, 4) explore policies for protecting adjacent areas from incompatible uses, 5) devise potential incentives for locating in Industrial Opportunity Areas.

Barriers/Issues: Insufficient interest in concept, lack of staff time to devote to process,

Performance Measures: Number of Industrial Opportunity Areas designated in regional and local plans, number of local governments incorporating concept into local plans

d) Map and protect the region's "green infrastructure", natural heritage gems and areas of environmental concern. This strategy should also identify policies and development standards to protect these resources, including options for low impact design and streamlined watershed protection.

Lead Agency: Regional Councils of Government/Lower Cape Fear Sustainable Communities Consortium/Sustainable Sandhills

Strategic Partners: Local municipal and county governments' planning and parks departments, NC Department of Environment and Natural Resources, The Nature Conservancy, NC Coastal Federation, NC Coastal Land Trust

Estimated Cost: \$20,000 per region

Alignment of Resources: In-kind staff time,

One North Carolina Naturally, NC Commerce

Actions: 1) Scope out existing data sources with technical staff team, 2) convene local government and state participants, 3) select mapping standards and procedures, 4) produce initial maps for each region, 5) identify infrastructure gaps and opportunities

Barriers/Issues: lack of sufficient staff time to devote to the strategy

Performance Measures: Green infrastructure mapped, development standards initiated

e) Assist local governments with modifications to planning and zoning ordinances to maximize energy efficiency and to incorporate clean energy systems in public buildings. Encourage county and municipal governments with plans for new public buildings to evaluate the cost-benefit of solar and energy efficient smart design as a means to saving tax payer dollars over the life of the structure.

Lead Agency: Regional Councils of Government

Strategic Partners: County and municipal planners, UNC-Pembroke, UNC-Wilmington and Fayetteville State University

Estimated Cost: In-Kind from existing programs

Alignment of Resources: None needed

Actions: 1) Ensure that local governments are aware of assistance opportunities

Barriers/Issues: Effort may slow/cease when cur-

rent programs are completed

Performance Measures: Number of communities assisted.

f) Support brownfield work in communities with assessments underway, and collaborate on redevelopment efforts throughout the region.

Lead Agency: Cape Fear COG/Lower Cape Fear Sustainable Communities Consortium

Strategic Partners: City of Wilmington, City of Fayetteville, Town of Navassa, DENR Solid Waste Division-Brownfield's staff and county economic developers.

Estimated Cost: \$400,000 for regional assessment

Alignment of Resources: Environmental Protection Agency

Actions: 1) Convene meeting of EPA Brownfield's grantees and recent unsuccessful applicants 2) identify potential sites in region, 3) frame concept for EPA regional assessment application

Barriers/Issues: Insufficient staff time, highly competitive EPA funding

Performance Measures: New EPA funding for regional efforts, sites with completed assessments, new investment in Brownfield sites.

Goals, Objectives and Strategies

Goal #3: Create Revitalized and Vibrant Communities



Photo courtesy of Publicdomainphotos.com.

Objective 2: Ensure that underserved and distressed communities are engaged in the planning process

Strategies

a) Encourage the use of Social Media with translation options to offer a point of connection between underserved or economically distressed communities and local government services.

Lead Agency: Regional Councils of Government

Strategic Partners: Community Development Organizations

Estimated Cost: In-kind from Councils of Governments

Alignment of Resources: None needed

Actions: Incorporate things such as Twitter, Facebook, and Websites into the Economic Development Process as well as advertising in minority news publications and on minority oriented television and radio stations

Barriers/Issues: Getting underserved groups to the table

Performance Measures: New participants in the economic development process

b) Develop community-based, community-supported plans to stimulate new investment in distressed areas, aiming for both job creation and housing. This strategy should assess the feasibility and community support for designating high poverty areas in the region by the NC Department of Commerce and the potential for comprehensive improvements of redevelopment areas:

- 1) Agrarian Growth Zones, which qualify job-creators for enhanced tax credits and rewards for hiring area residents and long-term unemployed; and
- 2) Community Revitalization Strategy Areas, using Small Cities CDBG funds for coordinated projects in target neighborhoods.
- 3) Choice Neighborhood status in the vicinity of

older public housing communities that are designated locally for redevelopment.

Lead Agency: Regional Councils of Government

Strategic Partners: County economic developers, local housing authorities, municipal and county governments, Community Development Corporations

Estimated Cost: \$30,000

Alignment of Resources: NC Commerce, US Department of Housing and Urban Development

Actions: 1) Map areas that appear to meet eligibility requirements; 2) review potential AGZ's with county economic developers and pursue designation for eligible areas; 3) review potential Community Revitalization Strategy Areas with municipalities and Community Development Corporations; 4) prepare preliminary 'sketch' plans for qualifying areas for which there is strong community interest; 5) advocate for community revitalization opportunity to be included in State Small Cities CDBG Plans.

Barriers/Issues: Lack of staff time, funding

Performance Measures: New investment in Agrarian Growth Zones, new funding for community revitalizations strategy areas, new funding for Choice Neighborhoods, completed plans for distressed areas.

Goals, Objectives and Strategies

Goal #3: Create Revitalized and Vibrant Communities



Photo: Walkable neighborhood in the Cape Fear Region. Photo courtesy of Cape Fear Regional Council.

Objective 3: Invest in healthy, safe and walkable neighborhoods

Strategies

a) Ensure that each county within the region has in place a Comprehensive Transportation Plan that addresses healthy, safe and walkable communities.

Lead Agency: Region's Metropolitan and Rural Transportation Planning Organizations
Strategic Partners: County and municipal plan-

ners, North Carolina Department of Commerce, NC Department of Transportation

Estimated Cost: None Known

Alignment of Resources: None Needed

Actions: Request Comprehensive Transportation Plans for each county through NCDOT and Apply for Bicycle and Pedestrian Planning Grant Funds from NCDOT

Barriers/Issues: Availability of NCDOT Staff

Performance Measures: Pedestrian and Bike Plans included in County Comprehensive Transportation Plans.

b) Encourage the region's small cities to participate in the NC Certified Retirement Community Program and provide support for Lumberton's active certification. In 2010, the North Carolina Legislature designated Lumberton as THE FIRST Certified Retirement Community in the state.

Lead Agency: Area Agencies on Aging

Strategic Partners: City leaders, retirement and health services providers, NC Department of Commerce, Area COGs

Actions: Identify potential communities

Estimated Cost: None Known

Alignment of Resources: None needed

Barriers/Issues: None Known

Performance Measures: Communities identified



Photo: New downtown renovations, Elizabethtown . Photo courtesy of Klein Consulting.

c) Assist local governments as needed in developing sidewalk ordinances and conducting sidewalk inventories. Encourage local governments to provide for sidewalks and greenways in their development standards. Under this strategy the COGs will review ordinances and highlight best practices as models within the region.

Goals, Objectives and Strategies

Goal #3: Create Revitalized and Vibrant Communities

Lead Agency: Regional Council of Government
Strategic Partners: County and municipal planners

Estimated Cost: None Known

Alignment of Resources: None Needed

Actions: Ordinances reviewed and modified

Barriers/Issues: None Expected

Performance Measures: Changes in the Local Ordinances Regarding Sidewalks and Pedestrian Facilities; Best practice models developed

d) Improve public transportation systems by assessing and promoting opportunities for expanded service coverage area and time period of service.

Lead Agency: Region's Metropolitan and Rural Transportation Planning Organizations

Strategic Partners: County Public Transportation providers, NC Department of Transportation

Estimated Cost: None Known

Alignment of Resources: None needed

Actions: Sustain the existing process of identifying needed public transportation projects

Barriers/Issues: Lack of interest

Performance Measures: Updated Comprehensive Transportation Plans.

e) Support the enhancement of existing bikeways and trails within the region and identify new projects that encourage this transportation

and recreational opportunity. Support development of city greenways and the East Coast Greenway in the region.

Lead Agency: Region's Metropolitan and Rural Transportation Planning Organizations

Strategic Partners: NC Department of Transportation, Local Governments, Recreational Committees, East Coast Greenway Alliance.

Alignment of Resources: NC Department of Transportation, NC Department of Environment and Natural Resources, Local Governments.

Actions: 1) Map resources on bikeways and greenways identified and secured; 2) Potential Project List developed and shared

Barriers/Issues: None Known

Performance Measures: Collaboration occurs and Potential Project List developed and shared resulting in increased focus on funding needed projects.

f) Study the potential development of a Rails-to-Trails network in the region. The purpose of Rails-to-Trails is to create a nationwide network of trails from former rail lines and connect corridors to build healthier places for healthier people. Currently there are no designated Rails-to-Trails segments in the Lumber River region but there are numerous rail lines that have been removed.

Lead Agency: Region's Rural and Metropolitan



Photo: Designated bikeway in the City of Wilmington. Photo courtesy of Cape Fear Regional Council.

Transportation Organizations

Strategic Partners: NC Department of Transportation, Rails to Trails Conservancy, Local

Governments, Recreational Committees

Estimated Cost: \$20,000

Alignment of Resources: NC Department of Transportation, NC Department of Environment and Natural Resources, Local Governments

Actions: 1) Convene group, 2) determine if outside consultant is needed or if assessment can be conducted in-house, 3) conduct

Goals, Objectives and Strategies

Goal #3: Create Revitalized and Vibrant Communities

assessment and develop a plan of actions, 4) share results.

Barriers/Issues: Funding

Performance Measures: Additional Rails to Trails segments secured.

Objective 4: Promote vitality in the region's downtowns and 'Main Street' centers

Strategies

a) Continue efforts to support the Main Street Program, Small Town's Main Street Program and the North Carolina STEP program as means to engage citizens in the restoration and preservation of downtowns.

Lead Agency: Regional Councils of Government

Strategic Partners: Main Street program directors, NC Downtown Development Association, local governments, North Carolina Department of Commerce, Rural Center

Estimated Cost: None Known

Alignment of Resources: NC Commerce, NC Rural Center

Actions: 1) Prepare a list of priority projects in the region's Main Street, Small Towns Main Street, and STEP Towns, 2) examine priority projects for potential funding

sources

Barriers/Issues: Funding of projects

Performance Measures: Completion of Main Street and STEP Programs

b) Keep town centers functional by modifying planning ordinances that separate uses where needed and taking into consideration preservation of historically significant properties.

Lead Agency: Regional Councils of Government

Strategic Partners: Local Governments, Business Owners, Local Economic Developers. North Carolina Department of Commerce, Rural Center

Estimated Cost: None Known

Alignment of Resources: None Needed

Actions: 1) Modify ordinance, 2) create City Center Tax Incentive Programs

Barriers/Issues: Approval from Local Governing Boards

Performance Measures: Ordinances modified, tax incentive programs developed which yield new downtown businesses

c) Encourage adaptive reuse and historic preservation of priority buildings. This strategy should organize partners in the region for mutual support and assist with utilizing tax credits and other incentives for redevelopment.

Lead Agency: Regional Councils of Government

Strategic Partners: NC Commerce, Wilmington Downtown Inc., Main Street organizations, real estate professionals and architects specializing in historic preservation, Preservation North Carolina, NC Downtown Development Association

Estimated Cost: \$5,000 per region

Alignment of Resources: In-kind staff time, NC Commerce

Actions: 1) Convene working group to scope ideas and test interest in support network, 2) conduct 'how-to' seminars

Barriers/Issues: Staff time and outside expertise to devote to seminars

Performance Measures: Number of buildings reused, funds invested in preserving priority buildings, number of jobs created in reused buildings



Photo: Downtown Fayetteville at Christmas. Photo courtesy of nc140.com.

Goals, Objectives and Strategies

Goal #4: Develop Healthy and Innovative People

Years ago, the “economy” that concerned us consisted of what was local. Advances in communications and technology have changed that to a global frame of reference. How we prepare ourselves to live in that global environment determines our success within it. Our workforce must be skilled, agile and adaptable in order to succeed. The education, training and guidance we provide to our region’s youth, in particular, will greatly influence our economic future. Develop-

Photo Below: Sgt. 1st Class Walter Veazey, a jumpmaster instructor, U.S. Army Advanced Airborne School, prepares Nick Boyce, a 16-year-old Overhills High School student for his jump from the 34-foot tower at Fort Bragg. Boyce was one of about 30 teenagers who participated in the Teen Soldier For A Day event Tuesday, Aug. 16, 2011. The teens experienced physical readiness and drill and ceremony training, simulators, meals-ready-to-eat and other Soldier experiences during the annual event last year. (Photo by Stephanie Tatum/Fort Bragg PAO)



ing healthy and innovative people within the region so that they may enjoy success in a global economy is our priority. Below are objectives and strategies that will move us forward in developing our people and our economy.

Objective #1: Foster development, recruitment and retention of a skilled workforce.

Strategies

a) In today’s lagging regional economy, the volunteer members of the region’s workforce development boards rarely have time to lift above their meeting-to-meeting responsibilities to strategically establish the region’s workforce goals. A planned strategic planning effort for workforce program providers and administrators outside of the normal Workforce Development Board Meeting Environment is needed. Include the community colleges and universities, workforce service providers and economic developers. Develop a joint plan of action to better serve the long-term workforce needs of the region, to enhance operational efficiencies and explore opportunities for collaboration.

Lead Agency: Region’s Workforce Development



Photo: Participant in the Teen Soldier For A Day event Tuesday, Aug. 16, 2011. year. (Photo by Stephanie Tatum/Fort Bragg PAO)

Boards

Strategic Partners: Region’s colleges and universities, county and regional economic developers and workforce program delivery agents, NC’s Southeast Economic Development Partnership

Estimated Cost: \$45,000

Goals, Objectives and Strategies

Goal #4: Develop Healthy and Innovative People

Alignment of Resources: Collaboration of Workforce Development Boards

Actions: 1) Retain outside assistance to conduct a strategic planning/visioning effort; 2) document and share results.

Barriers/Issues: Agreement on need for the process.

Performance Measures: Development of holistic workforce planning.

b) Align education efforts (K-12, 2 year and 4 year degree programs) with labor market realities. Enhance existing career pathways from K-12 schools to business and industry to ensure craft skills needed by current and potential employers are developed and that youth are prepared for skilled jobs.

Lead Agency: Region's Workforce Development Boards

Strategic Partners: County Schools Systems, business and industry representatives, Community College CTE Directors

Estimated Cost: None known

Alignment of Resources: None needed

Actions: Develop curriculum changes in middle and high schools

Barriers/Issues: None Known

Performance Measures: New or revitalized skilled curriculum programs, increased youth engagement.

c) Enhance STEM (Science, Technology,

Engineering and Math) educational opportunities for the region's youth aiming for a traditional 4-year college degree and beyond. Grow the number of students completing a 4-year experience.

Lead Agency: NC Department of Public Instruction

Strategic Partners: Local economic developers, community colleges representatives, business and industry representatives, UNC-Pembroke, UNC-Wilmington, Fayetteville State University, Area Chambers of Commerce, Cape Fear Future, Region's Workforce Development Boards, Center for Community Action, PTAs

Estimated Cost: None Known

Alignment of Resources: None needed

Actions: 1) Employ recommendations from the recently completed North Carolina STEM Strategic Plan, 2) Provide STEM resources to parents and teachers

Barriers/Issues: None Known

Performance Measures: Increase in number of STEM-competent high school graduates.

d) Enhance leadership training opportunities for young adults including summer programs so that the region's youth will be ready to join the workforce. Nourish youth leadership programs and expand organizational partnerships to engage young adults in entrepreneurship and the business life of the region.

Lead Agency: UNC-Pembroke/UNC-Wilmington/Fayetteville State University

Strategic Partners: School Principals and Board of Education members, NC Department of Public Instruction, Fort Bragg, PTA, Community Youth Programs, Brunswick Housing Opportunities and other Community Development Corporations, 4-H, Region's Workforce Development Boards

Estimated Cost: To be determined from community interests

Alignment of Resources: NC Rural Center, Area Universities

Actions: 1) Assemble working group of youth leadership program staff, 2) assess successful models and focus of programs that are underway, 3) explore opportunities for new youth leadership programs in areas with interested host organizations.

Barriers/Issues: Funding

Performance Measures: Number of youth involved in programs, number of youth receiving business plans guidance.

Objective 2: Identify and analyze all educational resources and conduct a gap analysis if needed

Strategies

Goals, Objectives and Strategies

Goal #4: Develop Healthy and Innovative People

a) Provide an educational forum for the region's County School Board members which highlights the importance of K-12 education to the region's workforce. Explore strategies to strengthen the connection between educational providers, local business/industry and the citizens of the region. The following strategies, among others, should be considered:

- 1) Support university and community college initiatives to provide affordable higher education opportunities and to increase graduation rates;
- 2) Encourage early college for qualifying high school students;
- 3) Expand and enhance internships for students in regional private sector and public sector organizations;
- 4) Identify and build other partnerships between businesses, community colleges and universities to increase employment opportunities;
- 5) Utilize the Entrepreneurship Centers and SBTDC (Small Business and Technology Development Center) along with the Small Business Centers at regional community colleges to create and grow start-ups, small businesses and entrepreneurial networks;
- 6) Expand participation in degree programs for veterans and military dependents.

Lead Agency: A Collaboration of Regional Economic Development Partners

Strategic Partners: County School Board members, County school principals, Parent-Teacher Association members, UNC-Pembroke, UNC-Wilmington, Community College Presidents, other Economic Development Partners

Actions: Forum conducted; results recorded and shared

Estimated Cost: \$20,000

Alignment of Resources: Local contributions

Barriers/Issues: Lack of understanding on part School Board Members of the link between the type of education provided and success in the workplace.

Performance Measures: Forum held, gaps identified, strategies developed for enhancement of skilled trade and STEM education in the region.

b) Expand innovative career track programs that prepare students for high-skill jobs. Many of the region's high schools have developed innovative approaches to train students for productive careers. Examples include the Columbus County Career and Technology Academy programs in metals machining and manufacturing and broadcasting and communications technology; and the Health Occupations curriculum at South Columbus High School. The most effective models prepare students for careers, using

equipment and technologies that businesses in growing sectors use. Opportunities exist to replicate the most productive models in other southeastern counties.

Lead Agency: Region's Workforce Development Boards

Strategic Partners: NC Southeast Partnership, county economic developers, county school systems, private businesses, NC Department of Public Instruction, NC Commerce and local chambers of commerce

Actions: 1) convene exploratory meeting among school systems, 2) identify private sector allies, 3) celebrate recent graduates and highlight their 'success stories'

Estimated Cost: to be determined

Alignment of Resources: Foundations, US Department of Labor, NC Department of Public Instruction

Barriers/Issues: Funding modern equipment, cost of establishing new programs

Performance Measures: Number of students entering and completing new programs, number of students placed in private jobs

c) Conduct an education and marketing campaign to ensure that high school-aged children are reached with guidance and information on current occupational needs in the region. Data from a workforce skill gap study to be re-

Goals, Objectives and Strategies

Goal #4: Develop Healthy and Innovative People

leased in June 2012 indicates that 60%-70% of jobs in the region over the next decade will not require a traditional 4-year degree but will require at least a high school diploma. To address this demand, awareness of job opportunities in trades must be raised.

Lead Agency: Private Sector Committee of the Region's Workforce Development Boards

Strategic Partners: County School Board members, County high school principals and guidance personnel, Parent-Teacher Association members, county economic development professionals

Actions: Marketing campaign conducted; results recorded and shared

Estimated Cost: 20,000

Alignment of Resources: EDA, Local contributions

Barriers/Issues: None Known

Performance Measures: Increase in numbers of skilled trade students

Performance Measures: Students consider and pursue skilled trade careers

Objective 3: Enhance the digital literacy and technical skills of the region's workforce

Strategies

a) Assess the region's existing resources that support the 'tech-ready' workforce. A comprehensive inventory of network technology training programs would compare output with projected needs and identify gaps. Target e-commerce training programs to assist entrepreneurs and home-based businesses, encouraging the growth of tech-savvy small businesses.

Lead Agency: NC Broadband- NC Department of Commerce

Strategic Partners: Regional Councils of Government, NC Broadband external consultants (SNG, Lone Eagle), Community Colleges and private technical training institutes and UNCW Entrepreneurship Center

Estimated Cost: \$4,500

Alignment of Resources: NC Department of Commerce

Actions: 1) Inventory existing tech training programs, 2) project needs and gaps, 3) identify vulnerable communities needing specialized training, 4) target e-commerce training programs to entrepreneurs and home-based businesses.

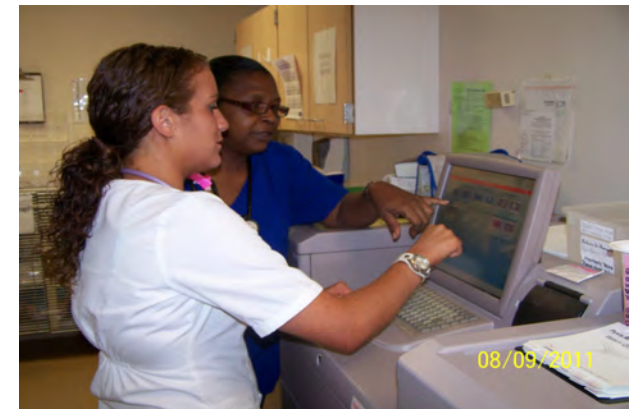
Barriers/Issues: Digital literacy programs often miss vulnerable populations, delivery of training can be costly and complicated

Performance Measures: Assessment completed by December 2013, development of on-line training resource portal, ultimately the num-

ber of people and businesses participating in training

Economic development focused on the recruitment of large industry to our region once generated the jobs and income to sustain our region's economy. When these plants left the region seeking cheaper labor overseas, our region experienced a tremendous loss of jobs leaving a record number of people unemployed. While some of these manufacturing facilities still exist in the region and are a vital part of our economy, diversifying our jobs base to include small businesses and entrepreneurs is an essential strategy to secure our economic future. A priority for this region is to develop a culture where entrepreneurs can thrive.

Photo: Nurses in Robeson County Clinic train on new digital patient software. Photo courtesy of Lumber River Workforce. Dev. Staff.



Goals, Objectives and Strategies

Goal #5: Encourage Entrepreneurs and Small Business Growth

Objective 1: Foster entrepreneurs and small businesses in the region as they provide needed employment options for the region's workforce and strengthen the regional economy.

Strategies

a) Conduct an inventory of entrepreneurial education resources and make recommendations for enhanced collaboration between service providers. Evaluate the where resources are available, education offered and use of services within the past twelve months to better determine if gaps exist in the regional system to support budding and existing entrepreneurs. Move toward a "One-Stop" approach to service provision to ease access to services.

Lead Agency: Collaboration of Entrepreneurial Service Funders

Strategic Partners: Entrepreneurial Development Providers and Business Owners, UNC Wilmington, NC Biotechnology Center, Entrepreneurship Center, Fayetteville State Center for Entrepreneurship

Estimated Cost: \$60,000

Alignment of Resources: NC Department of

Commerce, Rural Center, Golden Leaf Foundation, Local Contributions

Actions: 1) Convene group; 2) Conduct inventory and evaluation; 3) share information gathered; 4) Develop plan to address changes needed

Barriers/Issues: Collaboration across a large geographic region

Performance Measures: Gaps identified and addressed; systems moves closer to "one-stop" service

b) Deliver educational programs and one-on-one business counseling assistance to entrepreneurs, in partnership with SBTDCs and Small Business Centers at the community colleges.

Lead Agency: Entrepreneurship Center at UNCW

Strategic Partners: Small Business Centers at community colleges, SBTDC, county economic developers

Estimated Cost: \$300,000 per year

Alignment of Resources: Private contributions, foundations, NC Rural Center

Actions:

- 1) Develop a Mentor Program that "matches" experienced entrepreneurs with first-time entrepreneurs
- 2) Offer assistance with business plan development, accessing capital

3) Coordinate events and programs to provide fledgling entrepreneurs with "free" access to experts in legal, accounting, IT, insurance and marketing

4) Develop programs targeted to high-growth startups on topics such as building a board, fundraising, compliance/regulatory issues

Barriers/Issues: Raising funds to support programs

Performance Measures: Start-ups launched (target-8), new jobs added (target-50-75).

Objective 2: Help existing companies and small businesses expand

Strategies

a) Help companies see the opportunity for growth through International expansion by hosting Global events that focus on this topic, providing access to International resources and partners such as the NC and U.S. Department of Commerce, SBTDC's International Business Development group.

Lead Agency: Entrepreneurship Center at UNCW

Strategic Partners: NC Department of Com-

Goals, Objectives and Strategies

Goal #5: Encourage Entrepreneurs and Small Business Growth

merce, US Department of Commerce, SBTDCs:

Estimated Cost: \$25,000 per year (included in Objective 1 above)

Alignment of Resources: private contributions, NC Department of Commerce, US Department of Commerce

Actions: Conduct seminars, arrange consultations with state and federal experts, connect inexperienced entrepreneurs with veteran entrepreneurs doing global trade

Barriers/Issues: Funding

Performance Measures: Increased business activity, increased exports, increased jobs

b) Help companies understand the government procurement process and recognize the opportunities that government contracting can provide.

Lead Agency: NC Military Business Center

Strategic Partners: NCSE, Entrepreneurship Center, Small Business Centers, county economic developers.

Estimated Cost: Unknown, to be determined by NC Military Business Center

Alignment of Resources: NC Military Business Center, NC Department of Commerce

Actions: Arrange seminars, conduct workshops, connect entrepreneurs to companies experienced in military procurement

Barriers/Issues: Funding

Performance Measures: Increased business activity.



Photo: Employee of local entrepreneurial business, Del-Ton, Inc.. With assistance from the Economic Development Community, including a grant to fund a portion of the incubator building costs, the entrepreneur has expanded from a company of two to over 20 employees today. With additional assistance from the local sponsor and the EDA, this employer is expected to expand to over 40 employees.

List of Vital Projects

HIGHWAYS

Name	Lead	Estimated Cost	Resource	Strategic Partners
I-140 from US 421 to US 17 south of NC 87 (Brunswick County, connecting to New Hanover County)	NC Dept. of Transportation	\$521,109,000	NC Dept. of Transportation	Wilmington Urban Area MPO
Construct a new bridge south of the Cape Fear Memorial Bridge (CFMB) will add capacity, improve access to the State Port at Wilmington and relieve congestion on the CFMB.	NC Dept. of Transportation	\$1,030,589,000	NC Dept. of Transportation	Wilmington Urban Area MPO
Hampstead (US 17) Bypass-(New Hanover County and Pender County)-Construction of a bypass in the Hampstead area will increase US 17 capacity and improve safety.	NC Dept. of Transportation	\$220,240,000	NC Dept. of Transportation	Wilmington Urban Area MPO
Increase safety and provide better connectivity between the region's employment centers and metropolitan areas elsewhere in the state. An alignment of new I-74 along the US 74 corridor is recommended as it maximizes economic benefit in this high-value strategic corridor and avoids the environmentally-sensitive Green Swamp.	NC Dept. of Transportation	\$1,538,000,000	NC Dept. of Transportation	Cape Fear Area RPO
I-74/US 74 Upgrade to Interstate Standards-(New Hanover County, Brunswick County, Columbus County, Robeson County and Scotland County) Improvements are needed to add capacity, improve safety.	N C Dept. of Transportation	TBD	N C Dept. of Transportation	Cape Fear Area RPO, Lumber River Area, Wilmington Urban Area MPO
Complete all sections of I-73/74 that are missing or below interstate standards. (Most immediate needs are TIP projects R-3421 in Richmond County and I-3801 in Scotland County.	NC Department of Transportation	\$223,618,000	US DOT and NC Department of Transportation	Local RPOs, Region's Local Governments
NC 87 – Widen to multi-lanes from US 74/76 in Columbus County to the Elizabethtown Bypass in Bladen County.	NC Department of Transportation	\$234,407,000	NC Department of Transportation	Mid-Carolina RPO and Fayetteville MPO
Continue Progress of Interstate 295 (Fayetteville Outer Loop) - Recently approved for \$100 million.	NC Department of Transportation	\$600,000,000	NC Department of Transportation	Mid Carolina and Lumber RPOs, Fayetteville MPO And Local Governments
NC 24 – Construct a four-lane divided facility, part on new location, connecting Maxwell/Clinton Road in Cumberland County to I-40 in Duplin County.	NC Department of Transportation	\$410,189,000	NC Department of Transportation	Mid-Carolina RPO and Fayetteville MPO

List of Vital Projects

RAIL

Name	Lead Agency	Estimated Cost	Resource	Partners
Pembroke Northeast Connector Project. This project will involve the acquisition of new right of way and construction of new tracks north of Pembroke, NC to create a direct connection between the CSXT's A-line and its SE-line to the Port of Wilmington. The connection is needed to support rail transport from Fort Bragg to the Wilmington Port (Bragg now using Charleston, SC), and expansion of exports from North Carolina businesses including agricultural products.	NC Department of Transportation	\$14 million	NC Department of Transportation	Regions' Regional Transportation Planning Organizations, Local Governments
Creating dual use of rail lines by CSX and Norfolk Southern to provide improved access and competitive rates for businesses shipping goods by rail.	NC Department of Transportation	TBD	NC Department of Transportation	Governor's Logistics Task Force, Cape Fear Area RPO, Wilmington Urban Area MPO, East Carolina RPO, Goldsboro MPO
Re-establishing rail service between Whiteville, Tabor City & Conway, SC (Columbus County) Carolina Southern Railroad suspend its service due to unsafe bridges. This rail line provides a critical link between Columbus County industries and Horry County, SC, and is the subject of Horry County's unsuccessful application for 2012 TIGER IV funds for track and bridge rehabilitation.	NCDOT coordinating with Horry County, SC	\$23.2 million	USDOT TIGER funds, NCDOT	Columbus County EDC, Cape Fear Area RPO, NCSE
Restoration of rail lines between Wallace and Castle Hayne (New Hanover County and Pender County) About 27 miles of rail line was taken up in the early 1980's. Restoration would provide rail access from the Wilmington area to the northeast as well as another transportation mode for the region's agricultural products.	NC Department of Transportation	\$65,000,000	NC Department of Transportation	Cape Fear Area RPO, Wilmington Urban Area MPO, East Carolina RPO, Goldsboro MPO, NC Ports
Extend a rail spur to serve the Pender Commerce Park and other industrial sites on the US 421 corridor.	Pender County	\$1,032,000	NC Department of Commerce, EDA, NC Department of Transportation	NC Southeast, SEDC, NC State Ports

List of Vital Projects

AIRPORTS

Name	Lead Agency	Estimated Cost	Resources	Partners
Laurinburg-Maxton Airport Facility: Complete needed taxiway and hangar improvements to the Laurinburg-Maxton Airport facility to enhance the location as a critical link in shipment of exports.	LM Airport Commission	\$7.5 million	NC Department of Transportation-General Aviation Division, EDA	Local economic development professionals, local governments, NC Department of Transportation - General Aviation Division
Curtis L. Brown Jr. Field - Industrial Development: Land Acquisition & Taxiway Development	Town of Elizabethtown	\$2.3 M	Town of Elizabethtown, EDA, Golden LEAF	Town of Elizabethtown, Bladen's Bloomin

PORTS

Name	Lead Agency	Estimated Cost	Resources	Partners
<p>Improvements to the State Port at Wilmington:</p> <ol style="list-style-type: none"> 1. Maintain dredging of the Cape Fear Navigation Channel 2. Terminal operating technology, gate and roadways 3. 'Last mile' improvements (not including Cape Fear River Bridge) 4. Inland port and distribution improvements 	ALL: NCDOT/NC State Ports Authority	<p>Not Available</p> <p>\$8.2 million</p>	NC Department of Transportation, EDA, public-private financing	NC Department of Transportation, NC Department of Commerce, US Army Corp of Engineers, NC Department of Agriculture and Consumer Services, NC's Southeast, SEDC, Local Economic Developers, Private Sector Business Exporters

List of Vital Projects

WATER AND SEWER

Name	Lead	Estimated Cost	Resource	Strategic Partners
Hoke County Regional Sewer System: Phase 1-B to support and promote quality growth occurring in close proximity to Fort Bragg, and between Raeford and Fayetteville. Phase 1-A will serve the US401 corridor, including two new medical facilities - First Health of the Carolinas and Cape Fear Valley - creating 300 new jobs in Hoke County over the next five years. Hoke County will complete phase 1-A of the regional sewer system project by fall of 2012.	Hoke County	\$1.6 million (Phase 1-A) \$14.6 million (Phase 1-B)	Hoke County, NC Rural Center, CDBG, Golden LEAF, EDA, Lumber River Electric Membership Corporation	Hoke County, First Health of the Carolinas, Cape Fear Valley
Linden Water & Sewer District	Cumberland County	\$8 million	USDA, NCDENR	Cumberland County, Town of Linden
Vander Water & Sewer District	Cumberland County	\$7 million	USDA, NCDENR	Town of Vander, Cumberland County
Grays Creek Water & Sewer District	Cumberland County	\$10 million	USDA, NCDENR	Cumberland County
Cedar Creek Water & Sewer District	Cumberland County	\$10 million	USDA, NCDENR	Cumberland County
Town of Elizabethtown: Water and sewer improvements to serve new hospital facility between Mercer Mill Road and Executive Drive	Town of Elizabethtown	\$1.18 million	Town of Elizabethtown, EDA, NCDOC, USDA	Town of Elizabethtown, Bladen County, Hospital, Bladen's Bloomin
Water & Sewer Improvements	Pender County	\$5 million	Pender County	
Town of Elizabethtown: Sewer Plant Expansion and Upgrade	Town of Elizabethtown	\$5 million	USDA, EDA, NC Rural Center	Bladen County
Industrial Park Infrastructure	Robeson County	\$3 million	USDA, NCDOC, Golden LEAF, NC Rural Center, Robeson County	Town of St. Pauls, Robeson County
Town of Pembroke Wastewater Treatment Upgrades	Town of Pembroke	\$2 million	USDA, Golden LEAF, NC One Fund, Town of Pembroke, EDA, Robeson County	Robeson County, Town of Pembroke

List of Vital Projects

INDUSTRIAL PARKS AND BUSINESS INCUBATORS

Name	Lead Agency	Estimated Cost	Resource	Partners
Cedar Creek Business Center Shell Building	Cumberland County	\$2.75 million	NCDOC, County Gov't	CCBC, Cumberland County
Mega Site Development	Cumberland County	\$35 million	USDA, Rural Center, EDA, Golden LEAF and local Gov't	Cumberland County, City of Fayetteville
Southeast Regional Business Campus: industrial park development	Scotland County Economic Development Corporation	TBD	EDA, City of Laurinburg, Scotland County, NC Rural Center, Golden LEAF	Local government, NC's Southeast, SEDC
Small Business Innovation Center (SBIC)	Scotland County Economic Development Corporation	\$1.1 million	EDA, Golden LEAF, Scotland County EDC	Local government, SEDC
Expand Incubator at Brunswick Community College Workforce Training Center	Brunswick Community College	\$375,000	EDA, USDA, Golden LEAF	Brunswick County EDC, Brunswick County
Industrial Shell Building: Burgaw	Pender County	\$2 million	Pender County	
Business Incubator	Columbus County	\$1.2 million	Golden LEAF, EDA, Columbus County	Columbus County EDC
I-40 Exit 348 Industrial Park	Sampson County	\$2 million	Sampson County, NC Rural Center, Golden LEAF, CDBG, USDA, NCDOC, EDA	Sampson County, Sampson County EDC
COMTech Industrial Incubator	COMtech	\$1.6 million	COMtech, Golden LEAF, EDA	Robeson County, SEDC
Delco Industrial Park: infrastructure	Columbus County	\$250,000	EDA, Columbus County	Columbus County EDC

List of Vital Projects

INDUSTRIAL PARKS AND BUSINESS INCUBATORS (continued)

Name	Lead	Estimated Cost	Resource	Strategic Partners
I-40 Exit 355 Industrial Park	Sampson County	\$9 M	Sampson County, NC Rural Center, Golden LEAF, CDBG, USDA, NCDOC	Sampson County, Sampson County EDC
I-40 Exit 364/NC-24 Industrial Corridor	Sampson County	\$10 M	Sampson County, NC Rural Center, Golden LEAF, CDBG, USDA, NCDOC, EDA	Sampson County, Sampson County EDC
UNCP Entrepreneurship Incubator	University of NC at Pembroke	\$ 1.9 M	UNCP Foundation, Golden LEAF, EDA	UNCP, SEDC, Town of Pembroke
Columbus Alternative Energy and Biotechnology Center: infrastructure	Columbus County	\$100,000	EDA, Columbus County	Columbus County EDC, NC Biotechnology Center - SE Office
Natural Gas to the Elizabethtown Industrial Park	Bladen's Bloomin' Agri-Industrial, Inc.	\$5 M	Bladen County, Town of Elizabethtown, State & Federal Funding	Bladen County, Bladen's Bloomin', Town of Elizabethtown
Industrial Park Improvements: US 421	Pender County	\$1.5 M	Pender County, EDA, Golden LEAF	Wilmington Development, Inc., Pender County

Performance Measures

The Importance of Performance Measures

It is of utmost importance that the District be able to measure its performance in order to evaluate the successful implementation and development of the CEDS. The following quantitative and qualitative measures have been established to provide an objective way to measure the progress toward achieving the goals identified in the region. These measures will be reviewed on an annual basis within a CEDS progress report submitted to EDA by the SEDC.

GOAL 1: Build on the Region's Competitive Advantages and Leverage the Marketplace

- ◆ Number of jobs created and/or retained within the Region's competitive economic clusters.
- ◆ Increase number of the reuse of vacant buildings.
- ◆ Increase of cultural and natural heritage tourism opportunities.
- ◆ Establish an improved place brand for the region.
- ◆ Development of a regional marketing plan.

GOAL 2: Establish and Maintain a Robust Regional Infrastructure

- ◆ Number of existing and new businesses

helped by infrastructure improvements.

- ◆ State and federal dollars invested in the region for infrastructure projects.
- ◆ Establish an intermodal connectivity plan to support expanded exports of regional commodities.
- ◆ Amount of private sector investment resulting from infrastructure improvements.
- ◆ Number of investments in roads, rail, airport, transit, port and local technology infrastructure.

GOAL 3: Create Revitalized and Vibrant Communities

- ◆ Identified Industrial Opportunity Areas to encourage job growth with minimal impact on the environment.
- ◆ Number of brownfields redeveloped.
- ◆ New investment in distressed areas resulting in job creation and housing.
- ◆ Improved public transportation systems in the region.
- ◆ Restoration and preservation of downtowns throughout the region.

GOAL 4: Develop Healthy and Innovative People

- ◆ New partnerships formed to advance the connection between workforce development, education and economic develop-

ment.

- ◆ Lower dropout rates.
- ◆ Increase percentage of high school graduates.
- ◆ Increase percentage of residents with four-year degree.
- ◆ Increase per capita income.

GOAL 5: Encourage Entrepreneurship and Small Business Growth

- ◆ Number of jobs created.
- ◆ Number of jobs retained.
- ◆ Lower unemployment rate.
- ◆ Number of new businesses created.
- ◆ Amount of private investment in the region.

While the measures above incorporate the five performance measures required by the Economic Development Administration to evaluate the District's successful development and implementation of the CEDS, they go beyond to include ways to measure the success for each of the five goals included in this plan. In addition to those listed above, the District will continue to track the number of jobs created in the region; number and types of investments undertaken in the region; number of jobs retained in the region; amount of private sector investment in the region; and changes in the economic environment of the region.

Performance Measures

Specific Measureable Targets

The measurable outcomes shown below will be both direct and indirect results of the implementation of the CEDS. The process will be ongoing and accumulative. The District will focus on all goals and objectives identified by the Strategy Committee and other local economic development strategies aimed at sustainable job creation and private investment. The District will work closely with public and private allies and partners in the region to bring sustainable economic advancement to southeastern North Carolina.

The Southeastern District has established the following quantifiable performance measures to specifically address the regulatory requirements of the Economic Development Administration:

1) New Jobs

- ♦ *2,520 New jobs created in the region by September 2017.*

2) Number and types of investments undertaken in the region by September 2017

- ♦ *35 Infrastructure investments*
- ♦ *10 Facility investments*
- ♦ *8 Technical Assistance investments*

3) Retained Jobs

- ♦ *3,680 Jobs retained in the region by September 2017.*

4) Private Sector Investment

- ♦ *\$215,000,000 in private sector investment in the region by September 2017.*

5) Changes in the economic environment of the region:

The economic environment for the region will show significant improvement over the next five years. Changes in the economic environment relate to changes in the wider economy. Indicators such as the current and projected economic growth, inflation and interest rates; unemployment and labor supply; labor costs; levels of disposable income and income distribution; impact of globalization; and likely impact of technological or other change on the wider economy will be evaluated to determine significant changes of the economic environment of the region by September 2017.

Less Tangible but Equally Valuable Targets

As highlighted in the Visioning Meetings and in the Online Survey our region faces many challenges—we are a large geographic region, we have unique cultural and racial diversity, we have very significant diversity in financial well-being. We are a region that contains some of the State's poorest counties and some of its wealthiest. Education attainment levels vary, and we have been a region that has historically relied on large manufacturing investments to provide our jobs and income.

Today, we recognize our challenge is to overcome the barriers—economic, racial, cultural, political, financial—respect our differences and find our common good. To do this, we must face the challenges as a region, and as a people who see the strength of that diversity.

So, reaching out, embracing change, agreeing to meet with people we would not ordinarily meet with to seek that common good is, while less tangible than a job created or a dollar invested, perhaps more valuable for us and our sustainable future.



Appendices

Appendix I

Members of the SEDC Comprehensive Economic Development Strategy Advisory Committee

2012 Southeastern Economic Development Commission CEDS Advisory Committee

Private Representation (14)

Leon Martin, Senior Vice President, First Citizens Bank (Bladen)
Henry Edmund, President, Security Savings (Brunswick)
Don Hughes, Vice President of Operations, Brunswick EMC (Brunswick)
Dean Hilton, Vice President, Hilton Action & Realty (Bladen)
Paul Barnes, Vice President of Sales & Marketing, Aberdeen & Rockfish RR Co.
Brett Bostic, President, Bostic Building (New Hanover)
Jimmy Smith, Director of Economic & Community Development (Pender)
Glen Walters, Senior VP, Regional Executive, Lumbee Guaranty Bank (Robeson)
Randall Jones, Public Relations, Lumber River EMC (Robeson)
Barbara Knight, Human Resources Director, DuPont Fayetteville Works (Cumberland)
Jay Todd, Chief Operating Officer, Service Thread (Scotland)
Wade Dunbar, President, Dunbar Insurance (Scotland)
Jerry Milton, Vice President, Southeastern Interiors (Harnett)
Jill Smith, Director, Safety, Campbell Oil Company (Bladen)

Public and Non-Profit Representation (12)

Chuck Heustess, Director, Bladen's Bloomin' Agri-Industrial, Inc. (Bladen)
Gary Lanier, Director, Columbus County EDC (Columbus)
Amy Cannon, Deputy County Manager, County of Cumberland (Cumberland)
Linda Revels, Board Clerk, County of Hoke (Hoke)
Randall Johnson, Executive Director, NC Biotechnology Center (New Hanover)
Mark Lanier, Chancellor's Office, University of NC at Wilmington (New Hanover)
Rick Sago, County Manager & Economic Developer, County of Richmond (Richmond)
Jimmy Tate, County Commissioner, County of Pender (Pender)
Blondell McIntyre, Administrator, Lumber River Workforce Development Board
John Swope, Executive Director, Sampson County EDC (Sampson)
Charles Chrestman, President, Robeson Community College (Robeson)
Greg Taylor, Executive Director, Fort Bragg Regional Alliance (Cumberland)

Appendix II

Members of the Regional Ad-Hoc Committees from the Regional Councils of Government

Cape Fear Council of Governments

NAME	AFFILIATION
Mr. Andy Anderson	Community Innovations
Mr. Jonathan Barfield, Jr.	New Hanover County
Mr. Jim Bradshaw	Brunswick Economic Development Comm.
Mr. Kemp Burdette	Cape Fear River Watch
Mr. Carl Byrd, Sr.	New Hanover County
Ms. Carol Caldwell	DREAM Center Columbus County
Mr. Martin Cooke	Brunswick County
Ms. Carolyn Crocker	NC Commission on Indian Affairs
Mr. Wes Davis	Pender Adult Services
Mr. John Elliott	Progress Energy
Mr. Paul Gerald	G & G Health Care
Ms. Camilla Herlevich	NC Coastal Land Trust
Ms. Mary Lee Hudson	Greater Whiteville Chamber
Mr. Don Hughes	Brunswick Electric Membership Corp
Ms. Velma Jenkins	Brunswick Community College
Mr. Randall Johnson	NC Biotech Center
Mr. Gary Lanier	Columbus Economic Development Comm.
Mr. Mark Lanier	UNC-W
Ms. Connie Majure-Rhett	Wilmington Greater Chamber
Mr. Foster McKoy	City of Northwest
Mr. Lynwood Norris	Columbus County
Ms. Laura Padgett	City of Wilmington
Mr. F.D. Rivenbark	Pender County
Mr. Dan Ryan	The Nature Conservancy
Mr. Scott Satterfield	Wilmington Business Development
Mr. Harry Simmons	Town of Caswell Beach
Ms. Tracy Skrabal	NC Coastal Federation
Ms. Debbie Smith	Town of Ocean Isle Beach
Mr. Jimmy Smith	Four County Electric
Ms. Karen Sphar	Southport/Oak Island Chamber
Mr. William Sue	Brunswick County

Mid-Carolina Council of Governments

NAME	AFFILIATION
Mr. Bill Aiken	Sampson Community College
Mr. Paul Barnes	Aberdeen and Rockfish Railroad Road
Mr. William Brooks	BB&T Bank
Mr. Pete Campbell	US Fish and Wildlife Service
Ms. Maurizia Chapman	Fayetteville MPO
Ms. Susan Holder	Sampson County Government
Ms. Vickie Crane	Sampson Co. Convention and Visitors Bureau
Mr. Greg Burns	NCDOT Division 6
Mr. Chad Ham	Fayetteville Public Works Comm.
Mr. R. P. "Pat" Jones	Citizen -Town of Salemburg
Mr. Jon Parsons	Fayetteville State University
Mr. Glen Prillaman	Fort Bragg
Ms. Monita McLaurin	NC Div. of Community Planning
Mr. Carnell Robinson	City of Dunn
Mr. Victor Sharpe	City of Fayetteville
Mr. Raymond Spell	Sampson County Government
Mr. John Swope	Sampson County Economic Dev. Deevlopment
Mr. Greg Taylor	BRAC Regional Task Force
Ms. Deborah Teasley	Southern Region AHEC
Mr. Kent Wooten	Sampson County Extension Service
Mr. Adolphus Thomas	City of Fayetteville
Cape Fear Continued	
Mr. Jimmy Tate	Pender County
Ms. Brenda Troy	Workforce Development Board
Mr. Craig Umstead	Management Advisory Consulting
Mr. Jose Vergara	Seaside Software
Mr. Howard Walker	Town of Burgaw
Ms. Toni Whitaker	The Affordable Housing Coalition of South-
Ms. Resea Willis	Brunswick Housing Opportunities
Mr. Ivan Wilson	Town of Lake Waccamaw
Mr. Jimmy Yokeley	State Port Authority

Lumber River Council of Governments

NAME	AFFILIATION
Mr. Leon Martin	First Citizens Bank
Mr. Derrick Staten	Lumbee Bank
Mr. Randall Jones	Lumber River EMC
Mr. Wade Dunbar	Dunbar Insurance
Dr. Lynn Welborn	Bladen CC Small Business Center
Mr. Steve Yost	North Carolina's Southeast
Mr. Chuck Heustess	Bladen County Economic Dev.
Mr. Don Porter	Hoke County Economic Dev.
Ms. Linda Revels	Hoke County Government
Mr. Hubert Sealey	Robeson County Government
Ms. Blondell McIntyre	Lumber River Workforce Dev. Board
Mr. Dean Hilton	Hilton Auction and Realty
Mr. Greg Icard	Scotland County Economic Dev.
Mr. Jay Todd	Service Thread
Mr. Durham White	Southeast Regional Medical Ctr.
Mr. John Alford	Scotland County Government
Mr. Tim Johnson, PE	NCDOT District 8
Mr. Tryon Lowry	Lumbee Tribe
Mr. Jim McCaskill	Richmond County Government
Ms. Shannon Newton	Scotland County Government
Ms. Nancy Walker	Laurinburg Housing Authority
Mr. Brad Martin	REMAX Realty
Ms. Teresa Oxendine	UNC-Pembroke Regional Center
Mr. Enrique Torres	Telamon Corporation
Dr. Dale McInnis	Richmond Community College
Mr. Ben Moss	CSX Railroad
Ms. Cathy Locklear	Robeson County Extension Service
Mr. Wade Dunbar	Wesley Pines Senior Lifestyle Community
Mr. Johnnie Marshburn	UNCP – Small Business Technology

Appendix III

Southeastern Economic Development Commission 2012 Board of Directors

Mr. Chuck Heustess, *Vice Chairman*, Bladen County

- Executive Director, Bladen County EDC

Mr. Don Hughes, Brunswick County

- VP Operations, Brunswick EMC

Mr. Gary Lanier, Columbus County

- Executive Director, Columbus County EDC

Ms. Amy Cannon, Cumberland County

- Deputy County Manager, County of Cumberland (Cumberland)

Mr. Carnell Robinson, Harnett County

- Mayor Pro Tem, Town of Dunn

Ms. Linda Revels, Hoke County

- Clerk, County of Hoke Board of Commissioners

Mr. Randall Johnson, New Hanover County

- Executive Director, NC Biotechnology Center—Southeast Office

Mr. Jimmy Tate, Pender County

- County Commissioner, County of Pender

Mr. Rick Sago, Richmond County

- County Manager & Economic Developer, County of Richmond

Mr. Hubert Sealey, Robeson County

- County Commissioner, County of Robeson

Mr. John Swope, *Chairman*, Sampson County

- Executive Director, Sampson County EDC

Mr. Greg Icard, Secretary-Treasurer, Scotland County

- Executive Director, Scotland County EDC



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This report was prepared under an award
from the U.S. Department of Commerce, Economic Development Administration.

Investment Award Number

04-83-06654