

REGIONAL VISION PLAN

Piedmont Triad Region,
N.C.

Submitted by:

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LIVE GROW WORK

Market Street brings original insights and clarity to the evaluation and revitalization of the places where people live, grow and work. *Market Street* inspires trust in all community stakeholders – citizens, educators, leadership and industry – because our holistic, proactive process takes into account all the aspects that shape community life. Through honest and informed assessments, *Market Street* can equip you with the tools to create meaningful change. Our solutions successfully merge our unique vision with your economic and social realities.

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BACKGROUND

The Piedmont Triad Region (“Triad” or “Region”), defined as the 12-county area that is the jurisdiction of the Piedmont Triad Partnership and several other regional organizations, is a diverse region with multiple assets and continuing needs. The Piedmont Triad Partnership (“PTP”) contracted with *Market Street Services*, a national economic and workforce consulting firm headquartered in Atlanta, Georgia, to gain a better understanding of where the Piedmont Triad Region is today, to update its *Regional Vision Plan*, and to move the Piedmont Triad Region towards its goals. The North Carolina legislative mandate from Section 13.6 of House Bill 1414 provides funding for the state’s seven regional economic development partnerships to develop and implement strategic vision plans that accomplish the following tasks:

1. Perform a comprehensive study of the region’s resources and existing businesses located in the region to determine what business clusters exist and the boundaries of those clusters, to develop ways to strengthen those clusters, and to determine in what areas the region has a competitive advantage that could lead to the development of future clusters.
2. Ensure that the benefits of the economic development plan are widely dispersed and that the plan provides real opportunities in rural areas as well as in urban and suburban areas.
3. Develop focused and targeted economic development initiatives related to the recruitment and development of new businesses and the retention of existing businesses.
4. Provide a mechanism for continuous monitoring of the regional economy and competitiveness indicators and for updating the strategic economic development plan to take account of changing economic conditions.
5. Recommend infrastructure investments to meet the region's current and anticipated future needs.
6. Integrate the North Carolina Community College System and The University of North Carolina into economic development efforts and planning.
7. Create leadership networks that span the public and private sectors and that facilitate communication within clusters, between members of complementary clusters, and between members of the public and private sectors.

Market Street has outlined a process for the Piedmont Triad Region to address the legislative mandate and succeed in uniting all regional communities under the

umbrella of quality growth and sustainable development. At the end of the strategic visioning period, the Triad will have a regional roadmap guiding local communities towards a visionary future together.

The four phases of the project are described below:

- I. ***Competitive Realities.*** A realistic assessment of the Region's demographic and economic trends and its business competitiveness compared to three peer metropolitan areas. Complementing the quantitative data analysis is feedback gathered and compiled into a ***Regional Input Summary.***
- II. ***Target Cluster Analysis.*** Identifies primary business sectors that have the highest probability of sustained success for the future of the Region's economy. The ***Target Cluster Analysis*** examines national trends and builds upon the work of the ***Competitive Realities.***
- III. ***Regional Vision Plan.*** Developing the ***Plan*** brings together all subsequent project deliverables and provides a blueprint for the Region's future actions. The ***Plan*** addresses targeted business clusters, entrepreneurship, improving factors that affect business competitiveness, and leveraging regional partnerships.
- IV. ***Implementation Plan.*** Effective implementation is critical to the ultimate success of the ***Regional Vision Plan.*** The Steering Committee and ***Market Street*** will work together to designate lead organizations, provide program assessments, determine funding reallocations, establish timetables, and recommend marketing and communication approaches.

As the third stage of ***Market Street's*** work for the Piedmont Triad Region, this ***Regional Vision Plan*** is the culmination of the research components from the earlier phases of this project. The ***Plan*** presents a vision for the future of the Region and a strategy for achieving the Region's goals.

STEERING COMMITTEE

A Steering Committee, chaired by Tom Ross, Executive Director of the Z. Smith Reynolds Foundation, and Watts Carr, Chairman of the Piedmont Triad Partnership Board of Directors, was established at the beginning of the strategic planning process to provide guidance and leadership. The Committee was selected from both public and private sectors throughout the 12-county Piedmont Triad Region to provide broad representation of businesses, economic development groups, higher education institutions, K-12 education systems, elected officials, and tourism assets.

The Steering Committee has been responsible for reviewing and providing feedback on project deliverables and participating in discussions about the future direction of the Region. It has made decisions about the final selection of the goals and objectives in the *Regional Vision Plan* and reached consensus on a vast majority of the detailed action steps. The Steering Committee approved unanimously on June 23, 2005 that the *Vision Plan* provides the strategies that need to be implemented to move this Region forward.

The following are the chairmen and members of the Steering Committee.

Co-Chairmen

Watts Carr	Piedmont Triad Partnership
Tom Ross	Z. Smith Reynolds Foundation

Members

Evelyn Acree	Mechanics and Farmers Bank, Winston-Salem
Dennis Barry	The Greensboro Partnership
Robert Brown	B & C Associates, High Point
Steve Googe	Economic Developers Advisory Council/Davidson County Economic Development Commission
Lyons Gray	Piedmont Triad Partnership
Nate Hall	Piedmont Triad Council of Governments
Phil Hanes	Cultural Affairs – City of Winston-Salem
Wade Hobgood/Susan Booth	North Carolina School of the Arts, Winston-Salem
Keith Holliday	Greensboro Mayor
Jose Isasi	Latino Communications, Inc., Winston-Salem
Allen Joines	Winston-Salem Mayor
David Jones	NC Zoological Park, Asheboro
Mary Kirk	Montgomery Community College
Harold Martin	Winston-Salem State University
Jim Melvin	Joseph M. Bryan Foundation, Greensboro
Judy Mendenhall	International Home Furnishings Market Authority, High Point
James Merrill	Alamance-Burlington School System

Jeff Miller	High Point Regional Hospital
Adnan Mjalli	TransTech Pharma, High Point
Dave Norbury	Piedmont Triad Entrepreneurs Network
John O’Leary	Thomas Built Bus, High Point
Dan Pugh	Northwest Piedmont Triad Council of Governments
James Renick/Phil Halstead	North Carolina A&T State University, Greensboro
Steve Ross	Burlington Mayor
Frank Sells	Surry Community College
Ralph Shelton	Southeast Fuels Incorporated, Greensboro
Becky Smothers	High Point Mayor
Patricia Sullivan/John Merrill	UNC Greensboro
Priscilla Taylor	UNC Board of Governors, Greensboro
Barbara Todd	Yadkin County Schools
Craven Williams	Greensboro College
Ralph Womble	Hanes Dye & Finishing, Winston-Salem

Market Street’s role in this process has been primarily as a researcher and facilitator, providing information and initial recommendations on the strategies in the *Vision Plan*.

REVIEW OF PREVIOUS FINDINGS

In the previous phases of this project, *Market Street* conducted quantitative and qualitative research to understand the issues facing the Piedmont Triad Region. The *Competitive Realities* report explained in detail the quantitative analysis, as it related to the Region's economic structure, demographic characteristics, and business climate and competitiveness. Qualitative information came from the interviews, focus groups, and surveys conducted during the *Regional Input* phase, as well as from discussions with the Steering Committee that led this planning process. The findings from this research are summarized in the following sections.

Demographics and the Economy

- ✓ The Region's population is older than its peer metro areas.¹ The Piedmont Triad has a smaller proportion of children 17 and under, and a larger proportion of residents age 45 and over than the three benchmark areas analyzed.
- ✓ The Region's per capita income (\$27,912 in 2002) is lower than many metro areas in the Southeast, including Charlotte-Gastonia-Concord, NC-SC; Richmond, VA; Nashville-Davidson-Murfreesboro, TN; Raleigh-Durham-Cary, NC; Louisville, KY-IN; Birmingham-Hoover, AL; Memphis, TN-MS-AR; Jacksonville, FL; and Virginia Beach-Norfolk-Newport News, VA-NC.
- ✓ There are significant economic disparities among the Region's counties, and between minorities and whites. Caswell and Montgomery Counties have the lowest per capita income, about 30 percent lower than the most prosperous counties of Forsyth and Guilford.
- ✓ The Region's labor force has decreased in size, indicating a lack of confidence in the labor market.
- ✓ The Region's labor force participation rate in 2000 (59.2 percent) was considerably lower than that of North Carolina, the United States, and the peer metro areas, and has decreased since 1990.
- ✓ The Region has a higher proportion of its employment in the manufacturing sector than do the state and the United States. The Piedmont Triad may go through additional adjustments to its economy as it moves away from manufacturing and more towards service-related businesses.

Business Competitiveness

- ✓ SAT scores and dropout rates have improved, but the Region still lags behind other areas. SAT scores have improved over the last three years, but

¹ In the *Competitive Realities* document, Greenville-Spartanburg-Anderson, South Carolina; Memphis, Tennessee; and Virginia Beach-Norfolk-Newport News, Virginia were chosen as benchmark comparative regions for the Piedmont Triad.

still lag behind North Carolina and the United States. The high school drop out rates have decreased, closely matching those of the State, but still greater than those of two of the three benchmark regions.

- ✓ Educational attainment also lags the state and the U.S., as well as two of the three benchmark regions. It is also troubling that there is great variation in educational attainment among the counties in the Region.
- ✓ The Region's key competitive strengths are its transportation infrastructure, community colleges, and cost of living. The Region is well served by interstate highways and federal roads; twenty-two colleges and universities serve over 80,000 students in the Region; and the cost of living, particularly housing costs, health care, and utilities, is lower in Winston-Salem than the national average.
- ✓ The number of higher education institutions is an asset, and their research capacity and collaborative efforts are developing. North Carolina Agricultural and State University, the University of North Carolina-Greensboro, and Wake Forest University are the three institutions offering doctorate degrees in the Region.
- ✓ Quality of life in the Region is good, but it is threatened by air quality issues and lack of coordinated land use planning. The American Lung Association ranked the Piedmont Triad 16th among 25 metro areas with the worst ozone air pollution. The population density of the Piedmont Triad urbanized area (Greensboro, Winston-Salem, and High Point) decreased by 11.4 percent between 1990 and 2000, meaning that land is being consumed at a faster rate than population growth.

Issues Raised Through Regional Input Process

The participants in the focus groups, interviews, and on-line survey raised many issues that the quantitative assessment identified as well. The primary issues raised include the need to 1) further develop the research capacity of the Region's universities; 2) attract and retain younger workers and the "creative class;" 3) get regional entities to work together on planning for land-use, transit, and water and sewer capacity; 4) support existing businesses, small businesses, and entrepreneurs; 5) have the leadership be more open and inclusive; and 6) work together to fully leverage the Region's potential. The ultimate findings of the focus groups, surveys, and interviews raised the following questions:

- ✓ How do we define regionalism? Do we really mean Triadism?
- ✓ What will the success of this *Regional Vision Plan* look like?
- ✓ What is necessary to establish the Region's identity or brand?
- ✓ What are the components for attracting and retaining young people? What regional assets need to align to make this happen?
- ✓ How can this Region be more inclusive of rural areas and minorities?
- ✓ What can the Region do to increase the number of quality job opportunities?
- ✓ What strategies need to be implemented to support entrepreneurs, small businesses, and existing businesses?

- ✓ How can coordination of air quality and land use planning be improved?

Primary Issues to Address

The presentation of these previous findings led to the Steering Committee's identification of these issues for the Piedmont Triad Region to address:

1. Air quality problems affect not just manufacturing operations, but also quality of life.
2. The Region's air quality is heavily influenced by its transportation system. Public transportation options in the Region can reduce reliance on the automobile and serve aging and low-income populations.
3. The Region needs to address solid waste disposal.
4. The Region's water supply problems need to be addressed.
5. The Piedmont Triad needs a comprehensive land-use planning effort that will address the need to preserve and create greenspace. If existing development patterns persist, the Region's vital tourism business will be adversely affected by the loss of greenspace.
6. Throughout the Region, including the smaller communities, the central business districts need to be strengthened.
7. The Region needs stronger collaboration and a regional strategy to approach business retention and attraction. Piedmont Triad should not just focus on hard infrastructure and assets, but use creative solutions for business recruitment and retention.
8. The Region needs to build a culture of entrepreneurship and intrapreneurship based on existing assets.
9. There should be an effort to grow, recruit, and retain smart people of all ages.
10. There are concerns regarding race relations within the Region.
11. The Region's high illiteracy rates are contributing to the low labor force participation rates as illiterate people have difficulty finding jobs.
12. There is a leadership drain from the Region. We need to identify more leaders from the private sector. The nature of leadership and dialogue in the Piedmont Triad is changing, and it needs to reflect the demographic changes in the Region as well.
13. There needs to be a regional identity or brand. A region-wide project or festival could help create a Piedmont Triad brand and build trust within the Region.
14. Piedmont Triad needs more effective regional communication, marketing, and public relations – both externally and internally. The fragmentation of the media industry negatively affects a sense of regional identity.
15. The Region needs to create a sustained, multi-jurisdictional structure for working together.

Nearly Two Decades of Similar Issues

It is interesting to note that many of the issues highlighted in these research efforts are consistent with long-standing concerns of the Piedmont Triad – for almost the past two decades. In September 1987, leaders from Forsyth and Guilford Counties participated in a Triad Regional Planning Conference convened to begin looking at issues from a regional perspective. The main issues identified through this process were²:

1. Need to define “Triad” region.
2. Need for increased communication.
3. Infrastructure (telephone, transportation, water, and sewer).
4. Psychological problems.
5. Environmental concerns.
6. Funding of regional authority.
7. Conflicting local ordinances and development controls.
8. Lack of media support/understanding.
9. Lack of affordable housing.
10. Regard for individual landowners.

In 1999, *Market Street* conducted an organizational analysis of economic development entities in Guilford and Forsyth Counties. The key issues that were identified were:

1. No trust exists between the cities or counties.
2. There is no chance of consolidated economic development efforts.
3. There is no common vision.
4. There is no definition of the region.
5. More, diverse stakeholders are needed at the table.
6. Most people are unhappy with past efforts of the Piedmont Triad Partnership.
7. A new regional organization is not needed, but the Piedmont Triad Partnership needs to be completely reorganized.
8. All 12 counties need to be there.
9. Winston-Salem and Greensboro cannot lead the effort.
10. Need a functioning, multi-county development authority.

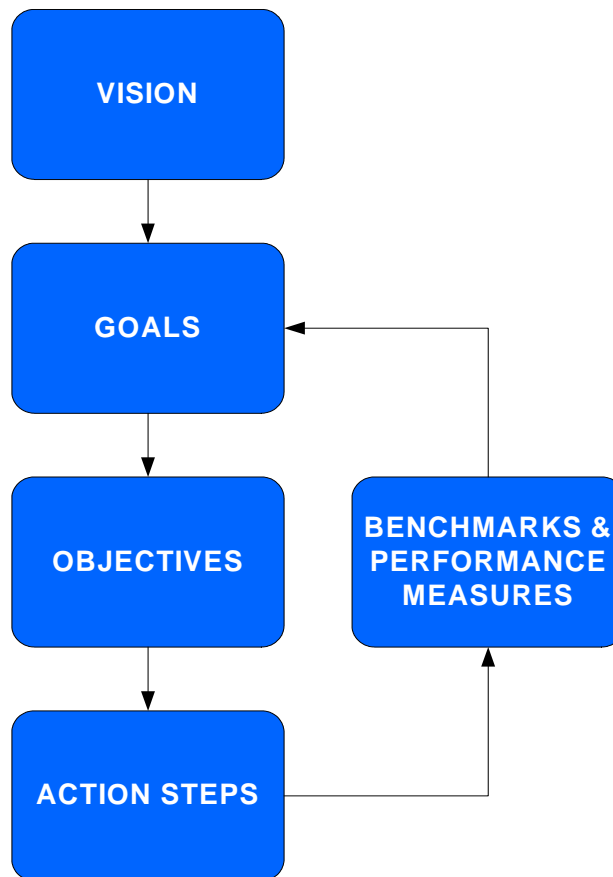
The persistence of certain issues from 1987 to 2005 illustrates that the Piedmont Triad still has fundamental concerns that need to be addressed before it can move forward. The Region needs to make sustained efforts and long-term investments in core areas to improve its economic development competitiveness. This *Regional Vision Plan* is an important opportunity for the Region to work together to overcome its issues from the past and tackle challenges it faces in the future.

² Source: “Summary Report.” Triad Regional Planning Conference. September 22-23, 1987. Page 23 (“Problems and Impediments.”)

METHODOLOGY

This *Regional Vision Plan* presents a vision for the Piedmont Triad Region’s future, and outlines five primary goals that the Region will strive for to achieve that vision. Each goal includes a set of objectives that represent the key strategies to focus on to attain that goal. Recommended action steps are provided for each objective. Action steps are the specific policies the Region will need to implement the objectives, and ultimately achieve the goals. While the focus of this *Plan* is on the 12 counties that are the jurisdiction of the Piedmont Triad Partnership and other regional organizations, the definition of regional boundaries can depend on the particular issue at hand. Involvement of additional or fewer counties during the implementation of the *Plan* should certainly be considered based on relevancy to the issue being addressed.

Process of Achieving the Piedmont Triad Region Vision



For this *Plan* to be successful, the progress of implementation must be monitored to keep the work focused on the most pressing issues and completed in a timely manner. This can be done by regularly collecting and analyzing data pertaining to

the benchmarks and performance measures that accompany each goal in this *Regional Vision Plan*. The benchmarks and performance measures will allow the Piedmont Triad to gauge the impact of individual action steps and assess the overall progress of achieving the goals. Benchmarks are the ultimate measurable goals that the implementation efforts are striving for, while the performance measures are the more specific measures to monitor the successful attainment of these benchmarks. For example, a benchmark might be exceeding national job growth rates, and the performance measure would then be the percent growth in the Region's jobs. Benchmarks and performance measures will enable the Piedmont Triad Region to track the progress of strategy elements and determine if additional efforts are needed to reach the Region's goals. However, as an Urban Institute report notes, performance measurements do have limitations: they cannot reveal the full extent to which a program caused the measured results; they cannot measure certain non-quantifiable outcomes like an area's "culture of entrepreneurship;" and they do not replace the need for political judgment, good management, creativity, etc., in the decision-making process.³ However, performance measurements can nevertheless identify trends, and trends can indicate progress, or the lack thereof.

While every attempt was made to ensure that the benchmarks and performance measures included in this document are as exhaustive as possible, the Piedmont Triad Region is encouraged to monitor the progress of this *Plan* to the level of detail they see fit. For example, performance measures can be analyzed at the county level as well as the regional level to understand if a particular county is far behind or ahead of the rest of the Region. Additionally, sometimes up-to-date data are not always publicly available. In these instances, the Piedmont Triad Region may have to work with local and regional organizations to collect the necessary data.

Because this plan is a "living" document, it will change and adapt over time to shifting economic, political and social conditions. Monitoring the progress of each strategic component will enable regional decision-makers to determine the effect of policies and programs on overall regional goals, and also elements of the *Plan* that need to be expanded, contracted, or altered.

This *Regional Vision Plan* focuses on what needs to be done to move the Region toward its vision for the future. It avoids discussion about who is responsible, when the strategy should be implemented, and how the strategies will be financed. These are topics that are addressed in the next phase, the *Implementation Plan*. The *Regional Vision Plan* focuses only on what needs to be accomplished, because by isolating this component, regional stakeholders can imagine the real possibilities for achieving its goals without being hampered by worrying about how to get there.

³ Hatry, Harry P. *Performance Measurement: Getting Results*. Washington, D.C.: The Urban Institute, 1999, p. 3.

VISION STATEMENT

The Piedmont Triad's vision statement is vitally important and is the cornerstone of the *Regional Vision Plan*. It must be widely accepted and understood by the Steering Committee and regional leadership. No goal statements or action steps should be included in the Plan that do not move the Piedmont Triad Region toward the achieving the vision. The vision statement articulates the preferred future envisioned by the Piedmont Triad Region's residents, businesses, and elected leaders. It describes an ideal, a model not yet achieved. The vision serves as a guide for regional decision-making and long-term initiatives.

The vision statement for the Piedmont Triad Region is:

The Piedmont Triad will be a dynamic region, working in unison toward a stronger economic future and an enhanced quality of life. A foundation and value system of broad diversity, educational excellence, and progressive leadership will make the Piedmont Triad an unparalleled place to live, work, and visit.

A REGIONAL VISION PLAN FOR THE PIEDMONT TRIAD

Based on the quantitative and qualitative research, five main goals and subsequent objectives were identified for the Piedmont Triad Region:

Goal 1: Education and Workforce Development

The Region will develop a highly skilled and well-trained workforce prepared to serve existing and future businesses.

- Objective 1:** Improve student performance and instill confidence in the K-12 education system.
- Objective 2:** Work to increase educational attainment in the Region, particularly for minorities, rural areas, and those under age 30.
- Objective 3:** Provide the education, training, and job search support needed for older, displaced factory workers to achieve self-sufficiency through the remainder of their working years.
- Objective 4:** Continue to develop and maximize the Region's research capacity of its colleges and universities, and seek opportunities for collaborative efforts.
- Objective 5:** Develop and enhance education and training programs and strengthen the connections between businesses and higher education institutions to prepare the workforce for jobs in the target cluster areas.

Goal 2: Leadership, Communication, and Partnership Building

The Region's leadership will establish the framework to align goals, effectively boost local morale, build trust, and maximize cooperation among regional constituencies.

- Objective 1:** Establish "rules of engagement" – a framework and principles of collaboration for elected officials, economic development organizations, chambers of commerce, and other organizations from multiple jurisdictions to work together on economic development issues and the *Regional Vision Plan*.
- Objective 2:** Create multi-jurisdictional vehicles and organizational structures that promote regional cooperation and allow sharing of resources.

- Objective 3:** Develop a regional identity that unifies the Region but does not compromise the unique qualities of individual counties and cities.
- Objective 4:** Develop regional media outlets that present news and information from all parts of the Region.
- Objective 5:** Build the regional leadership capacity that is inclusive of minorities, rural areas, multiple generations, and is necessary for the Region to succeed.

Goal 3: Economic Growth, Diversification, and Sustainability

The Region will diversify its economic base, generate quality job growth, and increase local wealth in the short term, and ensure economic sustainability in the long term.

- Objective 1:** Develop and expand the target clusters to create jobs and diversify the economy.
- Objective 2:** Coordinate the support infrastructure and create the culture and environment that will allow high-growth entrepreneurs to thrive.
- Objective 3:** Coordinate the support infrastructure to promote entrepreneurship and help lifestyle entrepreneurs attain self-sufficiency.
- Objective 4:** Increase the assistance and resources to support existing businesses and their expansion.

Goal 4: Infrastructure Development

The Region will commit resources to build the infrastructure needed to support economic growth and a high quality of life throughout the Region.

- Objective 1:** Develop a regional transportation plan that will accelerate and expand transportation infrastructure improvements, improve air quality, and accommodate alternative modes of transportation, including mass or public transportation.
- Objective 2:** Improve cellular and high-speed internet access in rural areas.
- Objective 3:** Develop an accepted plan to address solid waste disposal in the Region.

- Objective 4:** Ensure that the water supply and water quality in all of the Region's counties is adequate to support existing residents and businesses, as well as future growth.

Goal 5: Quality of Life Enhancement

The Region will be a place where people of all ages, incomes, and ethnicities want to live and have a high quality of life.

- Objective 1:** Expand arts, cultural, recreational, and entertainment activities that will attract people from all parts of the Region.
- Objective 2:** Work to attract and retain young people in the Region.
- Objective 3:** Improve air quality and exceed EPA air quality attainment standards in a way that enhances quality of life without hampering economic growth.
- Objective 4:** Create a framework for region-wide, coordinated land-use planning that preserves greenspace and is aligned with transportation infrastructure plans.

GOAL 1: EDUCATION AND WORKFORCE DEVELOPMENT

The Region will develop a highly skilled and well-trained workforce prepared to serve existing and future businesses.

Creating new jobs in the Piedmont Triad Region is worthless if the workforce is not prepared to fill them. Education and workforce development are about building human capital. Older economic structures, particularly in the South, were based on advantages in natural resources and low-cost labor. If the Piedmont Triad Region wants to move its economy forward, it must be prepared for the high-skilled jobs of the future.

The Region has some key issues to address in education and workforce development, for children as well as adults. The Region must work to provide a continuum of education opportunities that include pre-school, the K-12 system, higher education institutions, and retraining opportunities. Workers need to continually upgrade their skills in order to remain competitive in this global labor market.

Objective 1: Improve student performance and instill confidence in the K-12 education system.

Quality education is critical to successful economic development; it is about developing the workforce for the future. Qualitative and quantitative research indicates that the quality of the K-12 education system is a concern for the Piedmont Triad Region. The Region's SAT scores and proportion of high performing schools lag behind the state. Some people said that it was difficult to recruit potential employees to move to the Region, because they were not impressed with the education their children would be receiving. Some specific issues that were mentioned with the K-12 education system include overcrowding, lack of family importance placed on education, children living in poverty, high school performance and dropout rates, teacher recruitment and retention, and the need for the business community to be engaged.

Currently, the only region-wide organization that deals with K-12 issues is the Piedmont Triad Education Consortium. The focus of this group is on professional development for teachers and administrators, including training and legislative agendas. The group also encourages superintendents and higher education institutions to meet to discuss K-12 issues. The Consortium could be a resource for the Region to improve the K-12 system, but it does not include parents or business leaders.

ACTION STEPS

- ✓ Create a Regional Education Council that includes parents, teachers, administrators, workforce development providers, and business leaders from all counties in the Region.
 - Meet regularly to share experiences, successful programs, and practices to find the best options for dealing with similar issues.
 - Include representatives from minority groups as well as rural areas.
 - Discuss possibilities for collaborative efforts and maximizing resources.
 - Explore ways to engage the business community in hands-on learning, after-school programs, and curricula development.
 - Use the Piedmont Triad Education Consortium as a resource.
 - Engage the North Carolina Zoo and the Region's museums and other educational attractions to have a greater role in the K-12 education system.
- ✓ Develop a teacher recruitment and retention program that includes rewards for improved academic performance.
 - Involve the colleges and universities that offer education degree programs, as well as the community colleges, in a serious recruitment effort.
 - Identify innovative teacher recruitment strategies, such as housing subsidies or establishing a teaching fellows program, and expand existing recruitment efforts.
 - Offer incentives for teachers to work in low-performing schools.
 - Explore options for sabbaticals and exchange programs to re-energize teachers and enrich their experience.
 - Encourage business leaders and other organizations to be mentors for teachers.
- ✓ Increase parental involvement in student learning and parent-teacher interactions.
 - Maximize the use of technology to allow parents to see test scores, report cards, and maintain contact with teachers and counselors through the internet.
 - Increase efforts to engage parents of low-performing students and at-risk youth.
 - Hold information sessions and have information packets to explain to parents what the nature of their involvement in their children's education should be, and teach them appropriate ways to help.
- ✓ Pool resources to fund innovative ways to prevent dropouts and increase graduation rates.
 - Expand the capacity of alternative schools and programs and allow students from multiple counties to attend.
 - Increase student involvement in after-school activities that build self-confidence and interactive skills, stimulate creativity, and increase motivation.

- Initiate a scholarship program that targets at-risk students in middle school and early high school. Award these students with scholarships that they receive upon graduation.
 - Work with all affected regional partners, including social service, faith-based, and law enforcement agencies, to effectively use their assistance.
- ✓ Work with high schools and community colleges to develop progressive curricula that provide options for workforce preparedness (vocational preparation) and a smooth transition from high schools to community college programs.
 - Consider the ability for high school students to receive credit for community college courses that apply towards their community college degrees.
 - Invite community colleges to teach technical and workforce preparedness classes in high schools.
 - Align the course curricula so that the high school workforce preparedness classes complement and feed into the community college courses.
- ✓ Increase efforts to elevate the performance of students who are recent immigrants.
 - Provide more resources for transition support, such as translation services, English as a Second Language (ESL) programs, and bilingual counseling.
 - Promote cultural awareness, teach tolerance, and increase interaction between immigrant and non-immigrant students.
 - Coordinate programs with local Hispanic leadership to determine the priority needs of students and identify ways to engage and educate parents on the need for uninterrupted education.
- ✓ Expand the reach of pre-K programs, particularly to low-income and minority households.
 - Maximize the use of existing state programs and funds, such as Smart Start and More at Four, and seek additional grants from other sources.
 - Engage in best practice efforts to improve the quality of daycare facilities and pre-K programs.

Objective 2: Work to increase educational attainment in the Region, particularly for minorities, rural areas, and those under age 30.

Educational attainment is an issue for the Region; the percent of the Region's adults age 25 and over with at least a high school degree lags behind the state and the nation. There is great variation in educational attainment among the counties in the Piedmont Triad Region, particularly between rural and urban counties, and educational attainment is lower among blacks and Hispanics. Data from the North Carolina Employment Security Commission showed that of the job applicants in the Piedmont Triad Region between January 2004 and February 2005, 28 percent of applicants age 18 to 24 had less than 12 years of education. This figure is much higher than the percent of applicants age 25 to 64 with less than 12 years of school, 18 percent. This raises concern about the future of the Region's workforce given the educational attainment of this young population.

ACTION STEPS

- ✓ Initiate a *Value of Education* marketing effort to increase understanding about the need for higher levels of education attainment.
 - Target minorities and rural areas where many parents do not have high levels of education.
 - Educate school-aged children as well as adults on the education levels needed for a wide range of jobs.
 - Integrate the effort with a best-practice parental involvement program and involve school counselors to ensure that there are multiple channels of encouragement.
 - Stress the importance of lifelong learning.
- ✓ Expand the reach and depth of career exploration and awareness programs.
 - Begin at early grade levels.
 - Seek involvement of businesses in programs like job shadowing, mentors, apprenticeships and internships, and summer career academies.
 - Work on improving the perception of community colleges as a viable option for those who are not prepared or inclined to attend a four-year university.
- ✓ Create an incentive program for GED completion, and consider additional incentives to continue education beyond the GED.
- ✓ Ensure that higher education programs are aligned with the skills and knowledge that businesses need.
- ✓ Implement best-practice literacy programs.
- ✓ Increase online educational offerings to provide continuing education options for those who work or cannot attend classes in person.
- ✓ Establish support among businesses, community colleges, and universities region-wide for legislative change to allow undocumented residents to earn degrees and take classes at in-state tuition rates.

- ✓ Coordinate the training and workforce preparation efforts of community colleges, workforce development providers, and other non-profit service providers.
 - Identify ways to pool resources to address common problems.
 - Consider jointly providing certain programs or services.
- ✓ Strengthen the relationships between the Region's K-12 schools and the colleges and universities.
 - Expand and publicize summer programs designed to introduce students to college curricula and research activities.
 - Send community college program brochures to targeted households.

Objective 3: Provide the education, training, and job search support needed for older, displaced factory workers to achieve self-sufficiency through the remainder of their working years.

Layoff announcements and discussions with regional stakeholders highlight the fact that there are thousands of manufacturing and factory workers who were dislocated, many from the textiles and furniture industries. These factory workers tend to be older, but their re-employment needs seem to vary. We expected the Employment Security Commission data to show that job applicants age 45 to 64 (presumably many are laid-off factory workers) would have lower educational attainment rates, but in reality there was not a large difference between their educational attainment rates and that of applicants age 25 to 44. However, the Region has not met the need to re-employ these displaced workers; many have lost confidence and have dropped out of the labor force.

Guilford Technical Community College (GTCC) has established a Quick Jobs program to help dislocated workers find re-employment as quickly as possible. The program is only about one year old and offers job-specific training in 90 days or less in areas that are perceived to have job openings. Courses are designed based on the program administrators' observation of job advertisements and GTCC's employer network. According to Bob Plain, the program coordinator at GTCC, the employer network needs improvement and expansion. Since the program's inception, about half (6,000) of the estimated dislocated workers in Guilford County have attended Quick Jobs information sessions, and about 1,000 have signed up for the classes. Those who complete the courses are usually successful in finding re-employment.⁴

The Quick Jobs program appears to be the only sustained effort marketed as a re-employment program, but other community colleges in the Region do have some short-term training classes. A few community colleges have designed custom programs to address the needs of a specific group of dislocated workers.

One program to use as a possible model is Project New Start, spearheaded by the Franklin-Vance-Warren Opportunity, Inc. This job assistance and training program for tobacco workers serves Vance, Wilson, and Transylvania Counties and is funded by the Tobacco Trust Fund Commission and a contribution from the North Carolina Rural Economic Development Center. The program is thorough in its efforts, through tracking participants with a database and making frequent follow-up calls. About 125 participants have found re-employment; many others have developed job transition plans, received employability and job search training, and some have received emergency services, such as help with food, clothing, or housing.

⁴ Source: Bob Plain. About 85 percent of those who successfully complete the Quick Jobs courses find re-employment.

ACTION STEPS

- ✓ Expand GTCC's Quick Jobs program to other counties in the Region.
 - Seek increased funding for the program.
 - Link the program with job search assistance, such as resume preparation and interviewing skills.
 - Strengthen the ties between the programs offered and available jobs, and publicize these ties.
- ✓ Ensure that community colleges across the Region are working more with companies that have announced mass layoffs.
 - Ensure that efforts are coordinated with the Employment Security Commission and the Region's workforce development providers.
 - Publicize programs and services available to displaced workers.
 - Assign counselors to work with displaced workers to identify their specific needs, recommend re-employment approaches, and provide ongoing support.
- ✓ Establish support groups for displaced workers to convene and discuss their job search efforts.
 - Create a positive atmosphere where people learn from each other's experiences.
 - Have an effective job coach present who can give advice on education and training options as well as industries where jobs are in demand.
- ✓ Be proactive about training and educating factory workers even before layoffs occur.
 - Ask businesses for their support and participation by allowing flexible schedules for employees, paid time off, or financial assistance with tuition.
 - Educate businesses about the value of educational attainment for their employees. Prove the value by funding a set of employees to get their GED or take additional classes as an example; measure factors such as productivity, job satisfaction, and absenteeism.

Objective 4: Continue to develop and maximize the Region's research capacity of its colleges and universities, and seek opportunities for collaborative efforts.

Research capacity is critical to innovation and the creation of new knowledge. Research universities are important because not only do they perform research activities to create new knowledge, they also teach the workforce of the future to be able to do so. Involvement of the Piedmont Triad Region's colleges and universities is needed to train the Region's workforce in the target cluster areas, particularly in health care and biotechnology. The Region needs to focus its research and development in niche areas where it already has or is developing expertise.

Also important is the ability of higher education institutions to collaborate with each other, not just on research but also on curriculum development and other areas. Collaboration maximizes resources, and public and private funding sources are increasingly looking for ways to leverage their investments. The number of colleges and universities in the Region is an asset, but their research and collaborative efforts are still developing. The creation of a National Institute of Design is a new effort for the Region's colleges and universities to develop design-related curricula with courses from multiple institutions. However, it will take a long time for this initiative to have the same impact as the Savannah College of Art and Design, which serves seven times as many students and has twice the number of faculty as the North Carolina School for the Arts.

Wake Forest University and Winston-Salem State are the primary academic institutions leading the development of the Piedmont Triad Research Park. Also, North Carolina A&T University and UNC-Greensboro have begun to collaborate on research projects. Their most visible joint project is the Greensboro Center for Innovative Development (also known as Millennial Campus), which will include a science research park on the south side of the campus. Research areas would include biotechnology, food and nutrition, and others. This is a long-term project that will require fundraising and development of both physical space and research capacity.

ACTION STEPS

- ✓ Continue to apply for grants and research funding.
- ✓ Consider the formation of a Regional Research and Development Council, led by business in cooperation with universities and economic developers.
 - Identify research and development needs that universities and businesses could work on together.
 - Make R&D and technology policy recommendations to state and federal officials.
 - Identify possibilities for joint applications for federal grants.
- ✓ Hire a business representative who acts as a liaison between universities and businesses interested in the universities' resources.

- Provide contacts to specific departments, faculty members, or offices that can help with research, product design and development, and technical assistance.
- ✓ Elevate awareness of the capacity of technology transfer offices.
 - Make faculty and researchers aware of technology transfer options.
 - Publicize the availability of university research and technology to businesses in the Region.

Objective 5: Develop and enhance education and training programs and strengthen the connections between businesses and higher education institutions to prepare the workforce for jobs in the target cluster areas.

The six target business clusters identified in the *Target Cluster Analysis* represent the areas of greatest opportunity for the Region to leverage its existing strengths to create jobs. A key part of developing the target clusters is training a workforce that is prepared for jobs in the target cluster areas.

ACTION STEPS

- ✓ For each cluster, designate a few workforce development professionals to become cluster experts.
 - Work with businesses to understand the training and workforce needs of the cluster.
 - Communicate these needs back to workforce development agencies and higher education institutions.
- ✓ Create industry training consortiums for each business cluster.
 - These are working meetings to discuss workforce and training needs of each cluster and to strengthen the relationships among those involved.
 - Include businesses, workforce development professionals, community colleges, economic development professionals, and colleges and universities.
- ✓ Expand existing programs and develop new training and education programs to prepare the workforce in the target cluster areas.
 - Ensure that there is the whole spectrum of education options, from community college level to post-graduate degrees.

Goal 1: Benchmarks

The bolded benchmarks and corresponding performance measures are the most significant.

- ✓ Create and convene a Regional Education Council.
- ✓ **Increase average composite SAT scores by 50 points by 2010.**
- ✓ Increase per pupil expenditures by 3 percent annually by 2010.
- ✓ **Increase the percentage of Schools of Excellence to 32 percent by 2010.**
- ✓ **Increase the percentage of Schools of Distinction to 32 percent by 2010.**
- ✓ Reduce teacher turnover rates to less than 10 percent by 2010.
- ✓ Increase the number of education program graduates by 25 percent by 2010.
- ✓ Develop a web-based interface for parents to see test scores, report cards, and maintain contact with teachers and counselors.
- ✓ **Reduce high school dropout rates to below 4 percent in all counties by 2010.**
- ✓ Increase the interaction between high schools and community colleges.
- ✓ Increase the graduation rate of students who are recent immigrants by 50 percent by 2010.
- ✓ Increase enrollment in pre-K programs by 30 percent by 2010.
- ✓ **Increase the proportion of adults age 25 and over with at least a high school degree to 80 percent by 2010.**
- ✓ **Increase the proportion of adults age 25 and over with at least a bachelor's degree to 25 percent by 2010.**
- ✓ Increase the number of community college degrees awarded by 10 percent by 2010.
- ✓ Increase the percentage of adults with a literacy proficiency level of at least 3 to 50 percent by 2010.
- ✓ Create a *Value of Education* marketing effort.

- ✓ Increase the number of students involved in career exploration and awareness programs by 40 percent by 2010.
- ✓ Increase the percentage of Limited English Proficient students receiving specific programmatic attention to 90 percent by 2010.
- ✓ Increase total local job placement from the Region's community colleges by 10 percent by 2010.
- ✓ **Reduce the number of unemployed, displaced factory workers by 60 percent by 2010.**
- ✓ **Increase research expenditures at the Region's universities by 20 percent by 2010.**
- ✓ Create and convene a Regional Research and Development Council.
- ✓ Increase the number of technology transfer license agreements between universities and businesses by 25 percent by 2010.
- ✓ Designate cluster experts among the Region's workforce development professionals.
- ✓ **Create industry training consortiums for each business cluster.**

Goal 1: Performance Measures

- ✓ Number of attendees at Regional Education Council meetings.
- ✓ Number of Regional Education Council meetings per year.
- ✓ Number of programs initiated by the Regional Education Council.
- ✓ **Average composite SAT score for each county and for the Region.**
- ✓ Per pupil expenditures for each county and for the Region.
- ✓ **ABC status breakdown for each county and for the Region by elementary, middle, and high schools. (i.e. percentage of Schools of Excellence, Schools of Distinction, etc.)**
- ✓ Number of teachers from previous school year who have stayed for the current school year, for each county and for the Region.
- ✓ Number of graduates from education programs of four-year colleges and universities in the Region.

- ✓ Percentage of school systems in the Region with web-based interfaces for parents to see test scores, report cards, and maintain contact with teachers and counselors.
- ✓ Number and type (ex: web, phone, in-person) of parent-teacher and parent-counselor interactions for each county and for the Region.
- ✓ Average change in grade point average of students in each county whose parents have: no interactions, weekly interactions, monthly interactions, semester interactions, and annual interactions with teachers and counselors.
- ✓ **High school dropout rates by county and for the Region, as defined and measured by the North Carolina Department of Public Instruction.**
- ✓ Percent of high schools in the Region with a formal credit transfer and transition process to community colleges.
- ✓ Percent of immigrant students who graduate from high school.
- ✓ Enrollment in pre-K programs by county and for the Region, also as a percentage of children age two to four and by household income bracket.
- ✓ **Percent of adults age 25 and over for each county and for the Region who have at least a high school degree and who have at least a bachelor's degree. Also analyze by race and ethnicity. Can also look at percent of adults with associate's degrees and graduate degrees.**
- ✓ Total number of certificates, diplomas, and associate degrees awarded by the Region's community colleges.
- ✓ Percent of adults age 18 and over with a literacy proficiency level of at least 3, as defined by the National Institute for Literacy.
- ✓ Number of dollars spent on the *Value of Education* marketing effort.
- ✓ Number of institutions and organizations participating in the *Value of Education* marketing effort.
- ✓ Percent of elementary, middle, and high school students participating in career exploration and awareness programs.
- ✓ Percent of Limited English Proficient students who receive specific programmatic attention in the current school year.

- ✓ Percent of students from the Region's community colleges who have graduated or completed programs in the last year and found a job within three months.
- ✓ **Percent of manufacturing workers who were laid off in the last three years who are unemployed.**
- ✓ **Total dollars spent on research and development activities at the Region's colleges and universities.**
- ✓ Number of attendees at Regional Research and Development Council meetings.
- ✓ Number of Regional Research and Development Council meetings per year.
- ✓ Number of programs initiated by the Regional Research and Development Council.
- ✓ Number of technology transfer license agreements signed between the Region's universities and businesses.
- ✓ Number of designated cluster experts from workforce development organizations for each target cluster.
- ✓ Proficiency among cluster experts of industry knowledge and understanding of education, training, and skill levels needed for each target cluster.
- ✓ **Number of target clusters that have formed industry training consortiums.**
- ✓ **Number of attendees at industry training consortium meetings for each target cluster.**
- ✓ **Number of industry training consortium meetings per year for each target cluster.**
- ✓ **Number of programs initiated by the industry training consortiums.**

GOAL 2: LEADERSHIP, COMMUNICATION, AND PARTNERSHIP BUILDING

The Region's leadership will establish the framework to align goals, effectively boost local morale, build trust, and maximize cooperation among regional constituencies.

Lack of leadership and inability for community leaders to work with each other will cripple any efforts to work on a regional strategic plan. The Piedmont Triad Region needs to overcome its history of internal competition and understand that it can achieve more by working together to make the entire Region competitive with other metropolitan areas. Working together requires building trust among the Region's varied constituents, and establishing the framework that will allow cooperation to occur.

Objective 1: Establish “rules of engagement” – a framework and principles of collaboration for elected officials, economic development organizations, chambers of commerce, and other organizations from multiple jurisdictions to work together on economic development issues and the *Regional Vision Plan*.

As shown by the results of the 1987 Triad Regional Planning Conference and *Market Street's* 1999 economic development analysis for Guilford and Forsyth Counties, the Piedmont Triad Region has a long history of divisiveness, mistrust, and lack of communication across counties and cities. Although there have been some recent efforts by the universities and some of the chambers of commerce to increase dialogue with each other, the Piedmont Triad Region and its economic development entities are far from engaging in true regional cooperation. In addition to the high profile intra-region competition for the Dell site, economic developers have been known to offer incentives for companies to move from another county within the Region.

A number of Steering Committee members identified the need to establish “rules of engagement,” or a framework and principles of collaboration for organizations to work together on economic development issues. These principles would guide the way in which the organizations should conduct themselves and interact with each other. Having a set of agreed-upon ground rules will help set expectations, build trust, and enable effective partnerships.

ACTION STEPS

- ✓ Identify the key stakeholders for each economic development issue.
- ✓ Convene stakeholders to discuss the framework for rules of engagement.

- Topics include adequate representation during discussions, communication protocol and openness, media relations, and the process for making decisions and taking action.

Objective 2: Create multi-jurisdictional vehicles and organizational structures that promote regional cooperation and allow sharing of resources.

Most of the Region's economic development, philanthropic, and other organizations serve a single city or county; there are only a handful of organizations that serve multiple counties, much less the entire 12-county Piedmont Triad Region. The lack of regional "thinking" and regional cooperation was a major factor in the heated competition to provide Dell with a specific site within the Piedmont Triad Region. Many regarded the project as a win-lose situation rather than creating solutions that would produce a win-win situation.

The division of the Region into two Councils of Governments, multiple chambers of commerce, and other territory-based organizations hampers regional efforts. Consolidation of some of these organizations will help focus resources on issues that multiple cities or counties have in common. However, the Region's current leaders may not be ready to merge these organizations into more unified structures.

At the very least, the Region's governmental units and economic development organizations need to establish a way to prevent the competition over the Dell project from occurring in the future. Some sort of multi-jurisdictional structure or agreement that allows for sharing of resources would help encourage regional cooperation rather than competition.

In 2003, the North Carolina state legislature passed the Multi-jurisdictional Revenue Sharing Bill, which allows multiple jurisdictions to jointly develop a site by sharing costs as well as revenues. The five-county Kerr Tar Region, in the northeastern part of North Carolina, may be the first to successfully take advantage of the new legislation. It is working on a plan to develop the Kerr-Tar Hub, a 500 to 600 acre business park to attract technology companies to the rural region. The counties established an agreed-upon set of site selection criteria, based on mostly quantitative and some qualitative factors. The group then asked an independent, third-party consultant to recommend the final selection of the first Hub site for development. A few sites in the other counties will be developed concurrently. The participating counties are now in the process of creating a multi-jurisdictional, non-profit entity to develop and manage the Hub site.

One multi-jurisdictional development idea in the Piedmont Triad Region that is in the beginning stages of discussions is the "Heart of the Region". This project would create a master plan for the 53,000 acres of land along Interstate 40 from the Piedmont Triad International Airport to Kernersville in Guilford and Forsyth Counties. Unless a coordinated land-use plan is developed, the fragmented growth that has occurred in other parts of the Region will also occur along this centrally located corridor. Transportation and infrastructure development are other

components that need the cooperation of the multiple jurisdictions involved. Creating a tax-sharing district has not yet been discussed.

ACTION STEPS

- ✓ Consider a regional revenue sharing agreement that allows multiple counties to benefit from the site selection of a new or expanding company.
 - Consider development of a multi-county business or industrial park.
 - Use the Kerr-Tar Hub process as a starting point.
- ✓ Create a contractual agreement that requires appropriate local government jurisdictions and non-governmental organizations to participate as a single entity in the negotiation of any clearly defined mega-project.
 - Create strict criteria to determine the best possible location in the Region for the project.
 - Develop a cost and revenue sharing plan.
- ✓ Support the development of the Heart of the Region project.
 - Explore possibilities for an arrangement to share costs and revenues.
 - Ensure that the master plan take into consideration mass transit options, greenspace, and cluster development.

Objective 3: Develop a regional identity that unifies the Region but does not compromise the unique qualities of individual counties and cities.

One issue identified during by Steering Committee members as well as the feedback from the *Regional Input* phase was that there is no clear consensus on the definition of the “region” in which Piedmont Triad citizens live or work. To many, their “region” does not extend beyond their county lines. To others, the “region” is the same as the “Triad,” or the three primary cities, Greensboro, Winston-Salem, and High Point. Not very many of the Piedmont Triad’s citizens identify with the 12-county region that makes up the service area for the Piedmont Triad Partnership and a few other organizations.

A number of Steering Committee members noted that oftentimes, the issue at hand will determine the geographical definition of the Region. Some view the establishment of a regional identity or brand as a precursor to achieving regional cooperation, while others believe that in the act of working together and creating successes, a regional identity will develop.

While not the most critical economic development issue, establishing a regional identity is important for marketing the Region from within and to those outside of the Region. A name or phrase for the Piedmont Triad Region is not the only component of a regional brand or identity. Finding the Region’s identity also involves agreeing on a theme or quality of the Region on which to focus, that a large number of citizens can relate to and feel proud about, and that conjures an image of the Region in a unique and positive light.

ACTION STEPS

- ✓ Conduct a survey of the Region’s businesses, organizations, government entities, and residents to understand their perception of their regional identity.
 - Distinguish between what they consider to be their community and what they consider to be their region.
 - Identify the unique qualities of their community (city or county) and the unique qualities of their region.
- ✓ Use the survey results to create a brand for the Region that is marketed internally and externally.
 - Keep in mind that those who are not familiar with North Carolina may confuse the difference between the Triangle and the Triad.
- ✓ Encourage local counties and cities to use this regional brand in their marketing materials in addition to their own brand.

Objective 4: Develop regional media outlets that present news and information from all parts of the Region.

Several survey respondents and Steering Committee members discussed the fragmented media market in the Piedmont Triad Region. Very few of the Region’s media outlets (except for the *Business Journal* and a few others) consider all three of the Region’s major cities to be part of their market. One person noted that when the weather is reported on the news in High Point, the Piedmont Triad’s other cities do not even appear on the weather map. The lack of a single, dominant daily newspaper impedes communication and efforts to “think regionally.”

Although many people find it frustrating having to read multiple newspapers to get a full picture of what is going on in the Region, the media organizations say that their market is based on what their advertisers want. And advertisers perceive their market to be limited to a small part of the Piedmont Triad Region. The media organizations also think that the majority of the general public is not concerned with news from outside of their immediate area.

One concern that the television outlets do have is the split of Greensboro—Winston-Salem—High Point into two metropolitan areas (MSAs). Advertisers pay based on the size of the metropolitan area, and any drop in the size of the metro area size ranking would reduce the rates that the television stations get from advertisers.

ACTION STEPS

- ✓ Convene leaders from newspaper, television, and radio outlets to discuss the issue of fragmentation.
 - Explore opportunities to present news from multiple parts of the Region.
 - Consider conducting a survey to measure the desire for media coverage of multiple parts of the Region.
 - Explore ways to educate advertisers on the potential benefits of a larger media market.
 - Discuss the possibilities for market consolidation.
- ✓ Determine if there are outside or local investors who could buy and consolidate existing media outlets.
- ✓ Explore the feasibility of creating a free, weekly publication focused on arts, entertainment, and activities covering the entire Region.
 - Use Creative Loafing and the Nashville Scene as models and consider asking them about expansion into the Piedmont Triad market.

Objective 5: Build the regional leadership capacity that is inclusive of minorities, rural areas, multiple generations, and is necessary for the Region to succeed.

Leadership came up as an issue in many of the Steering Committee discussions as well as feedback from the interviews, focus groups, and surveys of the *Regional Input* phase. The following are some of the specific responses that interview and focus group participants mentioned as one of the top issues in the Region:

- “Huge void in leadership – county commissioners not willing to move forward.”
- “Need more youth in leadership positions.”
- “There is one thing missing in the Triad – core leadership.”
- “We need to diversify the leadership base and bring younger people and minorities into leadership. We’re not going to see much progress until that ‘nut is cracked’ and the entrenched power structure becomes more inclusive.”
- “We need some ‘wins,’ new leadership, and new wealth in the community.”

Many survey respondents also had specific comments about the need for leadership:

- “We have great opportunity for the future only if the leadership is focused on end results for the entire community and not solely for themselves.”
- “Growth/suburban sprawl is uncontrolled, with little vision on the part of leadership towards the future. Political divisiveness and infighting among leadership prohibits the ability of the region to grow, a necessity to attain real strides in this area.”
- “90% of our problems are lack of leadership.”
- “Not enough businesses and government leaders are promoting community values of cooperation for mutual benefit. Social capital is sorely lacking in many areas.”
- “We have diversity of the population; however, those diverse persons are not integrated well into the community and are not reflected in leadership.”
- “We need better cooperation among the city and county governments as well as better leadership from our elected officials. We also need to encourage and support our corporate leaders to take stronger positions with regard to economic development and recruitment.”
- “Attract more leaders from the private sector to leadership positions in organizations such as the Piedmont Triad Partnership. Current leadership is too heavily weighted with governmental representatives, who are naturally protective of parochial interests.”

The Region needs to develop public and private sector leaders who are prepared to address issues on a regional basis. The primary leadership issues that regional stakeholders identified were related to developing young and minority leaders,

engaging business and other private sector leaders, and electing leaders who have vision and understand the benefits of cooperation and regionalism.

Another potential source of regional leadership is the philanthropic community. Currently, the focus of most of these organizations is a single city or county. For example, Greensboro, High Point, and Winston-Salem/Forsyth County each have their own United Way operations, in addition to individual chapters in Alamance, Caswell, Davidson, Davie, Randolph, and Rockingham Counties. The Echo Council, a group formed by the Winston-Salem Foundation, has begun discussions about the possibility of a philanthropic hub for Forsyth County. Such an initiative could increase interaction among philanthropic organizations, encourage more civic engagement, and improve the use of scarce resources.

Each of the Region's counties has some type of leadership development program, and the Piedmont Triad Partnership Foundation funds the Piedmont Triad Leadership Network program to promote regional leadership. While these programs provide training in leadership skills and education on how local governments work, they do not harness the momentum that the programs generate. Leadership development would be more effective if participants completed the programs and had a specific project or problem to tackle.

ACTION STEPS

- ✓ Educate citizens and elected officials on the concept of regionalism, how individual cities and counties in the Piedmont Triad Region are inter-related, and the benefits that can be achieved by working together.
 - Integrate these efforts with establishing a regional identity.
- ✓ Organize formal planning retreats for elected officials and appointed leaders to discuss regional issues. Employ a professional facilitator to ensure that the discourse is amicable and constructive.
 - Help elected officials learn best practices by visiting other metro areas that have achieved successful results on similar issues.
- ✓ Engage business leaders and recruit them to work on regional issues.
 - Encourage regular feedback sessions between government officials and business and community leaders.
- ✓ Encourage more involvement in volunteer and community activities by young adults.
- ✓ Integrate leadership development programs with project or issues that participants can work on once they finish the program.
- ✓ Increase efforts in minority leadership development.
 - Consider providing scholarships or making free for minorities the region's leadership development program.
 - Include churches and faith-based organizations in efforts to identify and develop minority leaders.
- ✓ Explore opportunities to tap into the leadership development expertise of the Center for Creative Leadership.

- ✓ Consider consolidation, or at least coordination, of the Region's United Way activities.
 - Expand the Winston-Salem Foundation Echo Council's vision for a philanthropic hub to include Greensboro, High Point, and other parts of the Region.

Goal 2: Benchmarks

The bolded benchmarks and corresponding performance measures are the most significant.

- ✓ **Establish “rules of engagement” for future economic development issues.**
- ✓ Draft and reach agreement on a regional revenue sharing arrangement.
- ✓ **Draft and reach agreement on responding to future mega-projects.**
- ✓ **Draft and reach agreement on sharing of costs and revenues for the Heart of the Region project.**
- ✓ Conduct a survey of the Region’s businesses and residents to understand their perception of their regional identity.
- ✓ **Develop a widely accepted “brand” for the Piedmont Triad Region.**
- ✓ Hold at least two forums on media fragmentation.
- ✓ Develop a region-wide weekly newspaper focused on dining, entertainment, and local activities.
- ✓ Create and deploy a Regionalism Education program so that 75 percent of elected officials have attended this program by 2010.
- ✓ Hold annual planning retreats for elected officials to discuss regional issues.
- ✓ Increase minority participation in the Region’s leadership development programs to 15 percent of all participants by 2010.
- ✓ **Increase the number of people in the Region who can be identified as strong leaders who represent and can pull together the entire Piedmont Triad Region to five by 2010.**
- ✓ **Change the composition of the group of people who are widely considered leaders in the Piedmont Triad Region to be 15 percent age 30 and under, 15 percent minority, 40 percent women, and includes at least two people from each county.**

Goal 2: Performance Measures

- ✓ **Number of counties in the Region that agree to the rules of engagement.**

- ✓ **Number and extent of breaches to the rules of engagement.**
- ✓ Number of counties in the Region that agree to a revenue sharing arrangement.
- ✓ Number of times the revenue sharing agreement is used, compared to number of times it could have been used but was not.
- ✓ **Number of counties in the Region that agree to an approach for responding to future mega-projects.**
- ✓ **Number of times the mega-project agreement is used, compared to number of times it could have been used but was not.**
- ✓ **The existence of a Heart of the Region revenue and cost sharing agreement.**
- ✓ **Percentage breakdown of the Region's residents who identify themselves as being part of a county, city, the Triad, or the larger Piedmont Triad Region.**
- ✓ **Number of organizations, such as chambers and tourism boards, that include the Piedmont Triad Region's brand or logo on their marketing materials.**
- ✓ Number of forums held on media fragmentation.
- ✓ Number of attendees at each media fragmentation forum.
- ✓ Existence of a region-wide newspaper, in addition to the *Business Journal*.
- ✓ Number of participants in the Regionalism Education program.
- ✓ Number of times the Regionalism Education program is held each year.
- ✓ Number of participants in the annual planning retreats for elected officials.
- ✓ Percentage of the Region's counties and cities represented at the annual planning retreats.
- ✓ Percent of participants in the Region's leadership development programs who are minorities.
- ✓ **Number of people in the Region who can be identified as strong leaders who represent and can pull together the entire Piedmont Triad Region.**

- ✓ Percent breakdown of the group of people who are widely considered to be leaders in the Region, by race and ethnicity, age, sex, and county representation.

GOAL 3: ECONOMIC GROWTH, DIVERSIFICATION, AND SUSTAINABILITY

The Region will diversify its economic base, generate quality job growth, and increase local wealth in the short term, and ensure economic sustainability in the long term.

The fact that the Piedmont Triad Region has a greater share of its employment in manufacturing sectors than North Carolina or the United States puts it at risk of losing more jobs as globalization continues to impact U.S. manufacturing companies. Hardest hit are the Region's textiles and furniture manufacturing sectors. The Region needs to employ strategies to diversify its economic base away from traditional manufacturing sectors. Diversification also protects the Region's economy from drastic shocks should a particular business sector suffer. The target sectors recommended in the *Target Cluster Analysis* provide strong opportunities for the Region to diversify its economy.

Economic growth is not just about new business recruitment. Even more important is the need to grow existing businesses and nurture entrepreneurs. It is small companies and entrepreneurs that are typically the most innovative and create the most local jobs. Yet they often do not receive the support they need to grow.

Objective 1: Develop and expand the target clusters to create jobs and diversify the economy.

In the *Target Cluster Analysis*, *Market Street* identified six target business clusters that have the strongest growth prospects for quality job creation in the Region. The main criteria used to identify and recommend target clusters were:

- ✓ Does the Region have a significant presence in this target cluster, in terms of employment quantity or concentration?
- ✓ Are the industries in the target cluster export sectors?
- ✓ Does the target cluster have good growth prospects nationally?
- ✓ Is there wealth creation potential in the target cluster, in terms of high wages and advancement opportunities?
- ✓ Is the existing workforce prepared to take jobs in this target cluster, and do community colleges and universities provide needed education and training programs related to this target cluster?
- ✓ Do all of the targets combine to provide opportunities for rural, urban, and suburban areas of the Region?

Using extensive qualitative and quantitative research, *Market Street* has categorized the Piedmont Triad Region's target clusters into tiers. The first tier represents targets

that have the strongest growth prospects for all counties in the Region. These are: Health Care (including Biotechnology), Logistics, and Wholesale Trade. The second tier includes target clusters that are more specialized in the Region: Finance and Insurance, and Food Processing. The third tier of target clusters is comprised of the Arts, which includes design and film. This target is still emerging and is fairly fragmented in the Region. In addition, tourism was identified as one area of emphasis that can provide opportunities for job creation, particularly in rural parts of the Region.

Target clusters are not just for traditional business recruitment. Developing clusters is a much more holistic economic development approach, which includes business recruitment as just one component. Successfully developing target clusters must include a combination of supporting existing businesses, establishing communication networks, developing education and training programs, and creating an environment attractive to both businesses and workers. The Piedmont Triad Region can further develop target clusters by identifying missing linkages and establishing support infrastructure.

Having target clusters does not mean ignoring other opportunities that come along. Creating a positive business environment includes factors like education and workforce development, infrastructure, business costs, and quality of life. A strong business climate will attract and create opportunities for growth in many business sectors.

TARGET SECTORS

Health Care

The health care sector includes services, research, and manufacturing sub-sectors. The sector is defined as follows:

- Health Care Products and Services
 - Medical Equipment and Supplies Manufacturing (NAICS 3391)
 - Ambulatory Health Care Services (NAICS 621)
 - Hospitals (NAICS 622)
 - Nursing and Residential Care Facilities (NAICS 623)
- Biotechnology
 - Research and Development in the Physical, Engineering, and Life Sciences (NAICS 54171)
 - Pharmaceutical and Medicine Manufacturing (NAICS 3254)

With the aging of the Baby Boom generation and continuing advancements in diagnostics and procedures, demand for health care products and services will only increase. The U.S. Bureau of Labor Statistics predicts that employment in health care services will grow by 32.4 percent from 2002 to 2012, compared to 14.8 percent

growth in jobs overall. Additionally, nine out of the 20 fastest-growing national occupations will be in this sector.

The greatest impact in the health care target for the Piedmont Triad Region in terms of number of jobs and reach into rural counties will be in health care services and medical supplies and device manufacturing. Sub-sectors of particular focus are health care practitioners, laboratories and testing, health care services for senior citizens, and medical equipment and supplies. Biotechnology is still an emerging sub-sector and the reach of its growth will be limited in the near term. There may be some greater opportunities in the Region for bio-manufacturing.

The Region must work to improve workforce recruitment and retention in health care fields. This includes providing a smooth continuum from the classroom to the workplace. Moses Cone and other hospitals have been working with the local nursing schools to provide scholarships, internships, and other recruitment programs. Currently, no region-wide health care industry council exists to facilitate discussions and interactions among health care employers to address major issues like workforce retention. The Winston-Salem Chamber of Commerce did establish recently a Health Council focused mainly on Forsyth County, but it does include a few members for Greensboro and High Point.

ACTION STEPS

- ✓ Establish a region-wide health care industry group for existing health care businesses throughout the Region. This might be an expansion of the Winston-Salem Chamber's Health Council.
 - Meet regularly to discuss business challenges and opportunities.
 - Seek the help of and communicate with economic development officials.
 - Source opportunities for cross-firm linkages, joint workforce efforts, and other cluster synergies.
- ✓ Actively recruit specific health care companies to the Region.
 - Focus on firms in existing sub-sector strengths and complementary industry categories, such as health care services, medical device and supplies manufacturing, laboratory testing, and medical records technologies.
 - Encourage existing companies in the Region to assist in recruitment efforts.
- ✓ Designate a few economic developers to become cluster experts.
 - These individuals would represent the entire Region in cluster development efforts.
 - They can lead the effort in working with existing businesses, attending trade shows, and marketing the Region to the health care sector.
- ✓ Promote the adoption of advanced technologies for patient care and patient processing (medical records, patient intake, etc.).

- ✓ Initiate a region-wide recruitment and retention program for nurses.
 - Tap available resources such as the North Carolina Center for Nursing and the North Carolina Area Health Education Centers.
 - Coordinate the region's hospitals to work on increasing the size of the labor pool.
 - Include efforts to improve working conditions and job satisfaction.
- ✓ Community colleges, universities, and the Region's health care businesses should work together to align course curricula with workplace needs.
 - Create or expand degree offerings to support the target cluster.
 - Continually communicate existing and future job openings.
- ✓ Continue research and development in the biotechnology sub-sector.
 - Once focal areas within biotechnology are identified, market the focal areas to attract businesses and research funding.
 - Identify opportunities in bio-manufacturing.

Logistics

The logistics sector (NAICS 484, 488, 492, 493) includes truck transportation, warehousing and storage of goods, courier and shipping services, and support activities related to modes of transportation; the sector is also referred to as *distribution*. Given the Region's extensive highway transportation network, its location, and its accessibility, the logistics cluster is a natural fit and will leverage the Region's strengths.

The most exciting opportunity and challenge for the Region is to leverage the new FedEx hub to fully develop linkages throughout the logistics sector. There are opportunities for suppliers, such as trucks, parts, and repair services, and even more opportunities for customers who would benefit from FedEx's immediate shipping services.

Having a readily available workforce with skills and experience in truck driving, warehousing and distribution operations, and logistics and scheduling systems is important to growing the Region's logistics cluster. Training programs should be further developed, and workforce retention is also an issue.

According to a *Business Journal* special report on transportation, logistics, and warehousing, the Triad region has a shortage of large, modernized warehouse space. Most of the existing available warehouses that are over 100,000 square feet were used for textile storage and are functionally obsolete.⁵ The Region's real estate brokers expect demand for large warehouse spaces (even 250,000 to 300,000 square feet) to grow, particularly with the completion of the FedEx facility.

ACTION STEPS

- ✓ Actively recruit logistics companies to the Region.

⁵ Rash, Michelle Cater. "Dichotomy a challenge in warehousing market." *The Business Journal Service the Greater Triad Area*. March 25-31, 2005. p. 14.

- Develop the cluster to provide a wide range of services, from trucking to warehousing to supply chain software.
- ✓ Designate a few economic developers to become cluster experts.
 - These individuals would represent the entire Region in cluster development efforts.
 - They can lead the effort in working with existing businesses, attending trade shows, and marketing the Region to the logistics sector.
- ✓ Create a logistics service providers group to facilitate discussion among logistics businesses.
 - Work to identify opportunities to expand the cluster.
 - Assist in the recruitment of potential customers, such as manufacturing or wholesale companies.
 - Discuss needs for training and infrastructure improvement.
 - Play a role in region-wide transportation planning.
- ✓ Engage businesses, community colleges, and universities in the process of developing logistics and supply chain management training and degree programs.
 - Address continuing education needs for full-time workers, including programs to help workers move into management positions.
 - Accelerate the development of university-industry partnerships like those begun by UNC-Greensboro and N.C. A&T University.
- ✓ Encourage the upgrade of existing warehouses for modern users.
 - Focus on warehouses larger than 100,000 square feet in prime locations.

Wholesale Trade

Wholesale trade firms buy large lots of goods, usually from manufacturers, and sell them in smaller quantities to businesses, governments, other wholesalers, or institutional customers. They provide businesses a nearby source of goods made by many different manufacturers, and they simplify product, payment, and information flows by acting as intermediaries between the manufacturer and the final customer. The Region's transportation network and developing logistics sector are key assets to attracting and expanding wholesale businesses.

Wage and salary jobs in wholesale trade are projected to grow by 11.3 percent over the 2002 to 2012 period, compared with the 14.8 percent rate of growth projected for all industries combined. Wholesale trade generally offers good opportunities for self-employment and small business ownership.

Because wholesalers are so varied in the products they sell and the markets that they sell to, there is currently very little interaction among the Region's companies to discuss common needs and ideas. Wholesalers may have similar problems with regulations, workforce retention, or road conditions, and as a group, they may be better able to find ways to address these issues. Also, the business of wholesale trade

is inextricably linked to logistical functions. Supporting these linkages through industry trade groups or forums helps to ensure that needs of both sides are being met.

ACTION STEPS

- ✓ Establish a wholesale business industry group to discuss common issues, like workforce, training, transportation infrastructure, and regulations.
 - Communicate with the logistics group to identify opportunities to work together and to address related issues.
 - Seek the help of and communicate with economic development officials.
- ✓ Actively recruit wholesale companies to the Region.
 - Identify existing businesses to serve as industry representatives for visiting prospects and site selectors.
 - Effectively market the Region's transportation infrastructure, geographic location, and logistics services to the corporate relocation community.
- ✓ Designate a few economic developers to become cluster experts.
 - These individuals would represent the entire Region in cluster development efforts.
 - They can lead the effort in working with existing businesses, attending trade shows, and marketing the Region to the wholesale trade sector.
- ✓ Work with existing businesses to seek opportunities for expansion.
 - Leverage the expertise of logistics service providers to improve productivity and efficiency through process improvement and technology usage.
- ✓ Link wholesale trade training and education to logistics curricula.
 - Develop university-industry partnerships with UNC-Greensboro, N.C. A&T University, and the Region's community colleges.

Finance and Insurance

The finance industry is quite diverse, with retail operations that serve consumers and business owners, investment banking operations that serve larger institutions, and secondary markets that buy and sell financial instruments based on risk tolerance. The insurance industry has a similar market setup, with various risk management products sold to households, businesses, and institutions, as well as secondary markets for re-insurance and other instruments. National employment in finance and insurance grew 15.1 percent between 1996 and 2003, compared to 8.5 percent for all jobs.

The Piedmont Triad Region's finance and insurance cluster has a diverse group of businesses that includes:

- Commercial banks, savings institutions, credit unions
- Credit cards and consumer lending, mortgage banking
- Investment banking, securities and commodities trading, portfolio management
- Insurance carriers, claims adjusters, agencies and brokerages
- Pension fund management, trust fund management, real estate investment trusts

Due to the heavy concentration of existing jobs in Guilford and Forsyth Counties, future growth in finance and insurance is likely to be focused on these counties.

To prevent job cuts resulting from frequent consolidation activity from having a long-term effect on employees, the Region should develop this sector to the fullest possible extent in terms of breadth of services. This means focusing not only on banks, but also credit cards, other types of lending, claims adjusters, various types of insurance, and portfolio management. Skills are often portable among firms even if they offer different types of services.

The Region's finance and insurance sector also lacks a business group for meeting to discuss common needs and issues. This does not have to be solely at the chief executive level; department heads can also meet to discuss topics such as human resources, technology needs, or education and training.

ACTION STEPS

- ✓ Actively recruit finance and insurance companies to the Region.
 - Emphasize the quality of life and higher education assets.
 - Develop the range of the cluster – expand it to include portfolio management, multiple types of lending, claims adjusters, and multiple types of insurance companies.
- ✓ Designate a few economic developers to become cluster experts.
 - These individuals would represent the entire Region in cluster development efforts.
 - They can lead the effort in working with existing businesses, attending trade shows, and marketing the Region to the finance and insurance sector.
- ✓ Businesses, community colleges, and universities should collaborate frequently to ensure that workforce needs and course curricula are aligned.
 - Encourage businesses to recruit from the Region's community colleges and four-year institutions.
 - Develop internships and other opportunities for students to have hands-on training and establish relationships with local companies.
- ✓ Hold industry roundtables for multiple groups with varying foci.
 - Offer them for different levels and functions, such as for executives, technology managers, and human resource managers.

- Offer them for large businesses as well as small, locally owned operations.

Food Processing

Food Manufacturing (NAICS 311) is a very broad category that includes a number of manufacturing, milling, refining and processing sub-sectors. The industry is typically shielded from downturns in the economy, because households continue to consume food even in tough economic times. Local economic developers should concentrate on the high-end niches in these categories that provide well-paying, higher skill jobs without the workplace hazards characteristic of certain food processing employment. The sub-sectors that have higher value-added products include pet food manufacturing, snack food products, prepared food, and other specialty foods.

As a target cluster, food processing is meant to provide job opportunities to those without specialized skills or high education levels, particularly in the rural areas of the Region. Production workers account for nearly 50 percent of all food-processing jobs, most of which require little formal education or training.

Important location factors for food processing include land costs, labor costs, natural gas costs and accessibility, transportation networks, and proximity to major highways. Food processing facilities typically use a large volume of water to process food products and clean plant equipment, yielding large amounts of wastewater that must be treated. Logistical support is vital to the industry's operations.

The greatest challenge for this target cluster is to move from low-value production (poultry processing dominates) to high value-added products. There will need to be considerable efforts made to fully develop the target cluster. Linkages among food processing companies, between food processing companies and suppliers, and any sort of industry support infrastructure are yet to be established.

ACTION STEPS

- ✓ Actively recruit food processing companies to the Region.
 - Seek high-value production, in areas such as pet food manufacturing, snack food products, prepared food, and other specialty foods.
 - Identify areas to create buyer and supplier linkages.
- ✓ Designate a few economic developers to become cluster experts.
 - These individuals would represent the entire Region in cluster development efforts.
 - They can lead the effort in working with existing businesses, attending trade shows, and marketing the Region to the food processing sector.
- ✓ Partner with state and local farms and organizations to source the most effective crops to grow for food processing-related products.

- Work to develop relationships between regional growers and the Region's food processing companies to facilitate ongoing supply linkages.
- ✓ Seek the expertise of logistics companies to improve shipping and order management functions.
- ✓ Use the research capacity of the Region's universities to make improvements in food safety and storage, nutrition, and product development.
 - Encourage collaboration between universities and food processing companies.
- ✓ Consider the development of a food-based, or "kitchen," incubator.
 - Commercial kitchen space would be shared among participants to allow them to ramp up production of food products.
 - Use other kitchen incubators across the country as models.

Arts

"Arts" is a very broad term that includes multiple types of media and activities. Americans for the Arts identified six creative industries in which arts could be categorized: museums/collections; performing arts; visual/photography; film, radio, and TV; design/publishing; and schools/services.

The arts have traditionally been regarded as a cultural amenity that has a positive impact on the quality of life in a community. However, the arts can also be regarded as a viable component of economic development. There are arts and media professionals who earn a living in the business world, either through freelancing or steady employment, doing design work for profit-driven firms. Individual artists are finding new markets through the internet, arts and music festivals, and other direct sales routes. While the economic impact of the arts in terms of direct and indirect employment (the multiplier effect) is likely to be limited in its reach, the arts play an important role for promoting entrepreneurship and self-sufficiency.

The Piedmont Triad Region has a tremendous number of assets in the arts; however, they tend to be fragmented by location and organization. The main challenges for developing this emerging cluster include coordination across organizations and cities, achieving regional branding without sacrificing the uniqueness of individual communities, improving the interactions between professionals and universities, and leadership development.

ACTION STEPS

- ✓ Create a region-wide arts industry council that includes artists, galleries, businesses, universities, tourism representatives, and economic development professionals.
 - Meet regularly to generate support and discuss linkages, common needs, and opportunities for coordination.
 - Identify potential target markets, and suggest ideas for a theme to unify the Region.

- Suggest opportunities for events and capital investments to unify the Region.
- Encourage leadership development, particularly among young professionals.
- ✓ Work with universities and the North Carolina School of the Arts to improve the transition from students to professionals.
- ✓ Develop a strategy to attract and retain arts-related professionals.
 - Advocate for low-cost housing in urban areas.
 - Create informal networking opportunities in multiple areas of the Region.
- ✓ Create a short business development training program for artists.
 - Expand the efforts of the National Arts Leadership Institute at the North Carolina School of the Arts, and also engage the efforts of community colleges and the universities.
 - Courses could cover marketing, starting a business, and managing finances.
 - Ask the Region's prominent artists to speak and discuss their keys to success.
- ✓ Work with the Region's K-12 schools to offer arts-related programs for multiple skill and interest levels.
- ✓ Work with tourism development professionals to make them aware of events and activities, and to engage their help in marketing.
 - Seek ways to have a coordinated source of information for multiple counties and activities.
- ✓ Raise the profile of the Region for film-making.
 - Increase funding for the RiverRun International Film Festival.
 - Coordinate efforts with community colleges to expand and market programs in media technology and film-making technology (lighting, sound, etc.).

Tourism

The tourism industry is a means for many communities to leverage local recreational and cultural assets to help stimulate job growth in an otherwise shaky economy. Tourists and the dollars they spend in a community can bolster area tax receipts, bring business to local stores and restaurants, and lead to the development of amenities that benefit existing residents' quality of life as well. Making a locality attractive for tourists has the corresponding effect of augmenting the area's appeal for relocating businesses and workers. After all, every visitor to an area is also a potential resident, business owner or marketing tool advertising the community's strengths to friends, relatives and co-workers.

The Piedmont Triad Region has wide range of tourism assets that encompass outdoor recreation, arts and culture, sporting events, dining and shopping, and entertainment. However, very few of these assets are marketed on a regional basis, thus limiting their potential impact. Greensboro and Winston-Salem each have their

own Convention and Visitors Bureaus, and many of the other counties have their own tourism entities as well. It does not appear that these organizations work together on marketing efforts.

Integrated tourism development can be a positive economic development tool if the following issues are addressed:

- Tourism resources can be used more effectively when they are pooled to market a larger area. It is not just about a larger amount of marketing dollars; marketing a larger area means that there are more assets to attract visitors.
- Conventions, events, and other business-related travel should be included in an overall tourism strategy. There is tremendous competition for these types of meetings and overcapacity in the convention business, so this area should not be the only focus of the tourism strategy.
- As a whole, the Piedmont Triad Region has not established a brand or identity to market to visitors. While there is much work to be done to achieve consensus on this issue, regional branding represents an opportunity going forward.
- The Region must identify niches and target markets. By trying to be everything to everyone, the Region is at risk of not effectively reaching anyone.
- The full range of tourism development includes organizations that are not primarily tourism focused, but are affected by tourism. One example is the Piedmont Land Conservancy, which has a role in protecting and providing the natural resources that constitute the Region's outdoor recreational activities.
- In the process of establishing a brand, the Region must still be able to preserve and cherish the identity of individual communities. The Region's individual cities and counties need to learn to balance self-promotion with a larger community or regional context.
- Tourism is not just about marketing, but also requires product development. Multi-day stays have substantially more economic impact than one-day trips, but the local tourism infrastructure must enable visitors to stay longer. Hotels, restaurants, and package trips are examples of infrastructure missing in some of the Region's communities. Visitors need to be able to have an integrated travel experience from beginning to end.

ACTION STEPS

- ✓ Establish a regional tourism authority that will be funded to promote the Piedmont Triad Region.
 - Create a tourism advisory council to oversee the tourism authority that includes representation from all of the Region's counties.
 - Identify product development and infrastructure needs.
 - Offer packages that include attractions and events from multiple parts of the Region; it could be part of a themed package.
- ✓ Develop a regional tourism plan.
 - Address marketing, product development, and infrastructure development.
 - The plan could create sub-regions with distinct focuses, based on history, culture, and geographic interests.
 - Ask the Region's convention and visitor bureaus and tourism offices to provide support for regional marketing efforts.
- ✓ Create a recreational tourism group to focus on developing outdoor-based recreation assets in the Region.
 - Influence the development of greenways and other greenspace.
 - Support the development of the Yadkin/Pee Dee Lakes Project, i.e. the development of North Carolina's Central Park.
- ✓ Include the arts cluster in tourism development.
- ✓ Establish formal links among wine industry groups, tourism programs, and economic development groups.
- ✓ Create a tourism education program for local businesses, particularly in the rural parts of the Region.
 - Teach local businesses strategies for marketing to tourists, and explain how they can get involved in local tourism development.
 - Also enhance formal training and education programs in areas such as culinary skills and hospitality management.
- ✓ Recruit conventions, business travel, and sporting events.

Objective 2: Coordinate the support infrastructure and create the culture and environment that will allow high-growth entrepreneurs to thrive.

High-growth entrepreneurs are those that experience fast rates of revenue growth and have the potential to increase employment substantially. These types of entrepreneurs are important to the regional economy, not just from a job creation perspective, but also for their likelihood of innovation and technology improvements. Also known as gazelle firms, high-growth entrepreneurs – as defined by the Joint Venture Silicon Valley Network – are those firms that have sales growth of greater than 20 percent for each of the last four years, starting with at least \$1 million in sales.⁶ Other organizations have similar definitions for high-growth start-ups. In any case, high-growth entrepreneurs have different needs than that of lifestyle entrepreneurs, including different methods of establishing networks and seeking capital.

During the *Regional Input* phase, *Market Street* spoke with numerous Piedmont Triad Region entrepreneurs and small business development service providers to understand the opportunities and obstacles to starting and growing a business in the Region. The results of this analysis are as follows:

- The entrepreneurial environment in the Region is still developing. There are many lifestyle businesses, but not as many high growth, “fundable” businesses. However, the Region’s strong quality of life, affordable cost of living, and central location make it a place worth staying to start a business.
- The network of service providers is also developing and is a result of only five years of work. There is a breadth of services provided, but there is a lack of depth. An advocacy role needs to be established to represent the needs of entrepreneurs and pull in information and resources from the various service providers, universities, governments, and economic development organizations.
- Entrepreneurs need to improve their own networks. Currently, the Piedmont Triad Entrepreneurial Network is the main organization for entrepreneurial support, but it lacks the resources to host more industry-focused roundtables, mentoring groups, and CEO-level interactions.
- There is a lack of importance and resources placed on small businesses by the government and media. The Region’s chambers of commerce are not doing much to support entrepreneurship.

⁶ <http://www.jointventure.org/publications/index/2005index/progress/innovative/fastgrowth.html>.

- The Region's entrepreneurial culture can be energized by attracting people to the Region and keeping them here. Examples include experienced entrepreneurs from other parts of the country and young professionals.

These issues highlight the Region's challenge and need for more coordination of resources, information, and networks related to entrepreneurship and small business development.

ACTION STEPS

- ✓ Coordinate the activities of PTEN and YEO.
 - Occasionally hold joint meetings and networking activities.
 - Invite the incubators to participate in joint events as well.
- ✓ Consider creating a business plan competition that recruits entrepreneurs from outside of the Region.
 - Make one of the requirements that the entrepreneur locate the business within the Piedmont Triad Region.
 - The focus of this competition is on high-growth entrepreneurs.
- ✓ Coordinate the Region's support infrastructure for entrepreneurs: venture capitalist and other funding, SBTDCs, incubators, etc.
 - Increase resources for PTEN to lead the effort.
 - Meet regularly to discuss activities and programs.
 - Share databases of information.

Objective 3: Coordinate the support infrastructure to promote entrepreneurship and help lifestyle entrepreneurs attain self-sufficiency.

Efforts to nurture local entrepreneurs and fledgling businesses are crucial components of any local economic development strategy. Including the self-employed, small businesses account for half of the private, non-farm U.S. workforce, pay 44 percent of the total U.S. private payroll, and generate over 50 percent of the nation's private Gross Domestic Product (GDP).⁷ Small businesses also contributed the largest share of the millions of new jobs created during the late 1990s.

To focus solely on the recruitment and development of target sectors – and even the growth of the Piedmont Triad Region's existing large businesses – would do a disservice to the community's long-term economic well-being. Whether it is a high-growth company or a lifestyle business, entrepreneurship is a path to self-sufficiency, and local economic developers should ensure that potential job-creating businesses are given every chance to take root and grow. Supporting entrepreneurship in a community is a component of economic development that involves both a cultural shift and the dedication of resources.

Lifestyle businesses are different from high-growth firms in that their focus is on providing a steady income and type of lifestyle. Unlike high-growth entrepreneurs, lifestyle entrepreneurs are generally less willing to take significant risks, and their operations tend to remain small for the duration of the company. Lifestyle entrepreneurs also typically need more basic education on starting businesses and obtaining traditional methods of financing. However, lifestyle entrepreneurship is important to the Region's economy, because it is a way to achieve self-sufficiency as well as a high quality of life.

ACTION STEPS

- ✓ Evaluate the possibility of creating additional SCORE chapters.
 - Assess the interest of local retired entrepreneurs.
 - Assess the feasibility of creating a chapter to serve the northern and western parts of the Region, particularly the less urban areas.
- ✓ Consolidate, or at the very least coordinate, the services of the two Small Business and Technology Development Center (SBTDC) offices.
 - Identify opportunities to pool resources to better serve the entire Region.
- ✓ Increase entrepreneur education and exposure in K-12 schools.
 - Expand the Rural Entrepreneurship through Action Learning (REAL) program in to more of the Region's rural high schools.

⁷ U.S. Small Business Administration. <http://www.sba.gov/advo/stats/sbfaq.txt>. Accessed February 8, 2005.

- Expand the Junior Achievement programs to more of the Region's schools.
- ✓ Evaluate the feasibility of creating incubators in the rural part of the Region.
 - The focus will need to be on the local strengths of the economy.
 - The purpose here is entrepreneur development and to create small businesses that are not necessarily high-growth businesses.

Objective 4: Increase the assistance and resources to support existing businesses and their expansion.

In the desire to increase local economic activity and successfully recruit new firms and employment to an area, the needs of existing businesses can often be overlooked. A number of firms in the Piedmont Triad Region have already expressed dismay at the amount of resources and attention paid to recruiting Dell, while they saw few resources for existing companies looking to expand. By taking existing businesses for granted, however, the Region runs the risk of alienating these firms and losing them to another location.

Supporting existing businesses involves carefully paying attention to their needs and creating a positive business environment. It is crucial that communities help local businesses upgrade the efficiency of their current operations, expand their customer bases, and improve relationships with other area firms, purchasers, and suppliers. In addition, proactive measures of ensuring high-speed internet availability, good transportation and utility infrastructure, and efficient service at government agencies are ways to improve the business environment.

ACTION STEPS

- ✓ Create business calling programs in the counties where the program does not currently exist.
 - Meet regularly to share information on business needs and discuss ways that the other counties in the Region can help address these needs.
- ✓ Create a “business growth advocate” position that represents existing businesses and can identify potential resources for addressing their needs.
 - This person would have an understanding of resources of universities, government agencies, economic development organizations, and small business and entrepreneur support organizations.
- ✓ Consider the creation of a Business Assistance Office located within one of the main universities.
 - This office would provide local businesses with technical assistance – such as product design, research, and process improvement – using the expertise of faculty members of multiple regional universities.
 - This office would work with the university technology transfer offices.
- ✓ Improve efforts in minority and women business development.
 - Identify the needs of minority and women business owners.
 - Tap the resources of the North Carolina Minority Business Development Center.
- ✓ Gather the resources needed to ensure that the High Point International Home Furnishings Market remains competitive with the Las Vegas World Market Center.

- Seek the support of economic development organizations and chambers of commerce across the Region on issues related to the Market, including legislative support and funding.
- Engage the Region's political and business leaders in advocating fair pricing for hotels and rental cars during the Market period to be competitive with rates in Las Vegas.
- Increase citizen awareness of the impact of the Market on the entire Piedmont Triad Region, and create events or programs to engage citizens in the experience of the Market.
- ✓ Seek ways to mitigate job losses in furniture manufacturing.
 - Follow market trends and focus on high-end or customized products.
 - Identify opportunities in kitchen cabinetry and wood flooring to provide jobs for those transitioning from furniture manufacturing.
 - Identify training needs to upgrade skills of artisans and furniture factory workers.
- ✓ Capitalize on federal budget priorities by seeking opportunities in homeland security and defense.
 - Recognize that this is a broad area that includes many industry sectors.
 - Continue to apply for research funding for universities.
 - Revitalize the efforts of the Piedmont Triad Homeland Security Alliance to share ideas on homeland security and defense opportunities.

Goal 3: Benchmarks

The bolded benchmarks and corresponding performance measures are the most significant.

- ✓ **Maintain unemployment rates below 5 percent.**
- ✓ **Increase the Region's labor force participation rate to 75 percent by 2010.**
- ✓ **Reduce poverty rates in all counties to less than 10 percent by 2010.**
- ✓ **Increase per capita income to \$38,000 by 2010.⁸**
- ✓ **Achieve an annual employment growth rate of 2 percent by 2010.**
- ✓ **Diversify the Region's economy so that manufacturing makes up less than 18 percent of total employment by 2010.**
- ✓ Create an active, region-wide, Health Care Industry Group; Logistics Service Providers Group; Wholesale Business Industry Group; Finance and Insurance Industry Roundtables; and Arts Industry Council.
- ✓ Designate cluster experts among the Region's economic developers.
- ✓ Increase the number of nurses in the Region by 25 percent by 2010.
- ✓ Establish sustained funding for the RiverRun International Film Festival.
- ✓ Increase the Region's venture capital investments to \$20 million annually by 2010.
- ✓ Create a SCORE chapter in the northwestern part of the Region.
- ✓ Expand PTEN's budget by 15 percent annually.
- ✓ Establish the REAL program in at least 25 percent of the high schools in Surry, Yadkin, Stokes, Rockingham, Caswell, Randolph, and Montgomery Counties.
- ✓ Establish the Junior Achievement program in at least 25 percent of the Region's high schools.

⁸ As discussed in the *Competitive Realities* report, the Piedmont Triad Region's per capita income was \$27,912 in 2002, which is equivalent to \$29,991 in 2005 dollars (with inflation). Assuming a 2.5 percent inflation rate, this is equivalent to about \$34,000 in 2010. The benchmark is set higher than this "constant" figure.

- ✓ Increase the number of people who come to the Piedmont Triad Region from elsewhere and start a company by 30 percent by 2010.
- ✓ Hold quarterly meetings for entrepreneur and small business development support organizations.
- ✓ **Increase the number of new business starts by 5 percent each year.**
- ✓ Establish a business calling program in every county by 2007.
- ✓ **Increase the number of jobs created by expansions of existing businesses by 5 percent each year.**
- ✓ **Increase the percentage of minority-owned businesses to 18 percent by 2010.**
- ✓ **Increase the percentage of women-owned businesses to 30 percent by 2010.**
- ✓ Maintain attendance at the International Home Furnishings Market through 2010.
- ✓ Establish a funded Regional Tourism Authority.
- ✓ Develop a regional tourism plan.

Goal 3: Performance Measures

- ✓ **Unemployment rates by county and for the Region, monthly and annual averages.**
- ✓ **Labor force participation rate by county and for the Region. LFPR is defined as the number of people who are working or looking for work as a percentage of the total working age population (18 to 69).**
- ✓ **Poverty rates by county, as measured by the percent of people in each county who have household incomes below the poverty levels defined by the Department of Housing and Urban Development (HUD).**
- ✓ **Per capita income by county and for the Region. PCI is defined as total personal income divided by the total population for a geographical area.**
- ✓ **Total number of jobs by county and for the Region on an annual average.**
- ✓ **Percentage breakdown of total jobs in the Region by industry sector (2-digit NAICS).**

- ✓ Number of target clusters that have formed industry groups.
- ✓ Number of attendees and industry group meetings.
- ✓ Number of industry group meetings per year for each target cluster.
- ✓ Number of target clusters with economic development cluster experts.
- ✓ Percent of cluster experts who fully understand the workforce and business needs of the target clusters.
- ✓ Number of nurses working in the Region.
- ✓ Annual funding levels for the RiverRun International Film Festival.
- ✓ Number of organizations providing sustained funding to the RiverRun International Film Festival.
- ✓ Number of SCORE volunteers reaching out to entrepreneurs in Surry, Stokes, Yadkin, Davie, and Forsyth Counties.
- ✓ Annual budget for PTEN.
- ✓ Number of high schools in which the REAL program has been established.
- ✓ Number of high schools in which the Junior Achievement program has been established.
- ✓ Number of entrepreneurs who have started a company in the Region each year and who are from outside of the Region.
- ✓ Number of meetings each year between entrepreneurs and small business development support organizations to discuss needs for coordination and program changes.
- ✓ **Gross number of new businesses created each year.**
- ✓ Number of counties with a business calling program.
- ✓ **Number of jobs created each year by expansion of existing businesses in the Region.**
- ✓ **Percentage of businesses that are minority-owned and percentage that are women-owned.**

- ✓ Attendance at the International Home Furnishings Market.
- ✓ Total annual funding for the Regional Tourism Authority.
- ✓ Number of counties participating in the regional tourism plan.

GOAL 4: INFRASTRUCTURE DEVELOPMENT

The Region will commit resources to build the infrastructure needed to support economic growth and a high quality of life throughout the Region.

Infrastructure development is about creating a favorable business environment that can accommodate population and business growth. While traditional hard infrastructure – such as highways, water, and utilities – remains important, telecommunications infrastructure is also vital for today's economy.

Objective 1: Develop a regional transportation plan that will accelerate and expand transportation infrastructure improvements, improve air quality, and accommodate alternative modes of transportation, including mass or public transportation.

In the survey component of the *Regional Input* phase, respondents overwhelmingly cited the Region's location and transportation infrastructure as being its greatest strength. With its highway network and central location between Atlanta and Washington, D.C., the Region is extremely accessible for both businesses and residents. With the arrival of FedEx and the targeting of logistics-related businesses, the Region must ensure that its transportation infrastructure is prepared for future population and business growth, not just in terms of highway infrastructure, but also the airport, railroads, and other modes of transportation. Aging and low-income residents create a need for public or mass transportation.

The Piedmont Authority for Regional Transportation (PART) is the only organization focused on regional transportation planning. Its efforts have also begun to cover regional coordination of land-use planning as well. PART is increasing its work on promoting mass transit and planning passenger rail service between Clemmons and Burlington. These efforts are a long way from fruition, but are gaining some momentum. It also operates the regional bus service and is building additional park-and-ride lots to the bus service.

The Region's highway infrastructure is very important for the Region's businesses. According to a *Business Journal* special report on transportation, logistics, and warehousing, the Triad region has a shortage of full-service truck stops. There are currently three full-service truck stops in Mebane, Whitsett, and Lexington. These truck stops provide places to eat, shower, shop, and rest overnight. There is available land for a truck stop along the Region's interstates, but some communities may resist

due to their preference for large-scale commercial development that would create more jobs.⁹

ACTION STEPS

- ✓ Develop a regional, long-range transportation plan.
 - Consider not just highways, but also mass and public transit, bicycle lanes, and multi-modal access.
 - Identify priority projects and seek funding for them.
- ✓ Create a Citizens Advisory and Advocacy Group to provide input, support for regional transportation projects.
 - Work closely with PART.
 - Ensure that representation is from all parts of the Region, as well as from retirees, low-income households, neighborhoods, and businesses.
- ✓ Generate support for mass transit in the Region.
 - Educate citizens and elected officials on the long-term benefits and cost of the projects.
 - Consider funding options that would provide regional and long-term support, including taxation.
- ✓ Work to improve capacity on the Region's roads.
 - Create options for improving air quality and traffic flow, such as truck-designated lanes and high-occupancy vehicle lanes.
 - Continue coordinated efforts to lobby for accelerated construction of Interstates 73 and 74.
- ✓ Develop a coordinated, regional strategy to market the Federal Express hub and leverage opportunities for investment and job creation.
 - Involve business representatives as well as economic development groups and elected officials.
- ✓ Develop more full-service truck stops in the Region.
 - Facilities should include places to eat, shower, shop, and rest overnight.
 - Identify 15 to 20 acre sites along the interstate highways.
 - Possible ideal locations include the intersection of I-85 Business and I-40, along I-85 Bypass in southern Greensboro, and the intersection of I-40 and US 52.
- ✓ Identify needs for improving the rail system.
 - Explore ways to avert more freight traffic from highways.
- ✓ Seek ways to improve road access to the Piedmont Triad International Airport, particularly from the western and southern parts of the Region.

⁹ Rash, Michelle Cater. "Give me a break: Truckers say Triad needs more stops." *The Business Journal Service the Greater Triad Area*. March 25-31, 2005. p. 15.

Objective 2: Improve cellular and high-speed internet access in rural areas.

Multiple participants from the *Regional Input* phase noted that lack of cellular and high-speed internet service was a problem in the rural areas of the Piedmont Triad Region. Building cellular networks and telecommunications fiber is an expensive undertaking that is generally left to private-sector service providers. However, there may be a few ways that the public sector can accelerate the development of cellular service and high-speed internet access.

In January 2001, North Carolina established the Rural Internet Access Authority, which was renamed the e-NC Authority in January 2004. The e-NC initiative is a state effort to improve access to the internet in rural areas. The program has awarded grants for basic computer and internet training, funded the planning of a few Business and Technology Telecenters, and funded other projects to improve internet access and usage. All of the Piedmont Triad Region's rural counties have received some form of funding from the e-NC Authority, with total grant awards ranging from \$10,000 for Davie County to \$420,000 for Rockingham County, where one of the Business and Technology Telecenters will be located.

ACTION STEPS

- ✓ Identify a few priority areas that would need cellular or high-speed internet service the most.
 - Possible areas are along major roads or highways, or near schools and government facilities.
 - Assess the likelihood that businesses and residents in these priority areas would subscribe to cellular or high-speed internet service if they were available.
- ✓ Approach private cellular and internet service providers to discuss the feasibility of expanding service in the rural counties, particularly in the priority areas.
 - Seek the support and expertise of the Winston-Salem leaders, who were successful in establishing wireless connectivity in the downtown area and raised the profile and importance of internet access.
- ✓ Secure additional funding from the e-NC Authority.
 - Continue to apply for grants, and lobby for sustained legislative support of the e-NC program.
- ✓ Apply for federal funding opportunities, such as the Community Connect Grant Program through the Rural Utilities Service of the U.S. Department of Agriculture.

Objective 3: Develop an accepted plan to address solid waste disposal in the Region.

Landfills are generally regarded as “locally unwanted land uses,” or LULUs. Communities need them but do not want them located nearby. The urban areas of the Piedmont Region are growing and quickly running out of solutions for dealing with their solid waste disposal. On the other hand, the rural and suburban parts of the Region do not want to become the dumping ground for the cities’ trash.

The issue of solid waste disposal can be dealt with more effectively on a regional basis, because rural areas have the capacity to help urban areas. Also, combined operations can generate efficiencies and reduce capital costs.

ACTION STEPS

- ✓ Hold regional roundtable discussions to explore possibilities for establishing a framework to deal with this issue.
 - Include rural and urban counties in the discussions.
- ✓ Establish agreed-upon, objective criteria for the future location of solid waste facilities.
 - Use the criteria to identify potential sites for new solid waste facilities.
- ✓ Widely implement waste reduction programs that mitigate the need for new landfills.
 - Create programs for business, construction, and household waste – such as recycling, re-use of building materials, and composting of yard waste.
- ✓ Consider consolidating the operations of multiple jurisdictions to gain cost savings from joint contracting.

Objective 4: Ensure that the water supply and water quality in all of the Region's counties is adequate to support existing residents and businesses, as well as future growth.

As the Piedmont Triad Region grows, water supply and water quality will become increasingly urgent issues. Water supply affects economic development by constraining business and residential growth. Water quality impacts health and quality of life, in terms of drinking water and recreational use of rivers and streams. Industrial waste, urban runoff, and stormwater runoff are major factors that affect water quality. Land-use planning decisions contribute to runoff and waste; and environmental impacts should be considered with any development guidelines.

Water supply and water quality are issues that must be dealt with on a regional basis, because what one county does affects the others. The Piedmont Triad Council of Governments (PTCOG) conducted a Water Supply and Wastewater Capacity Assessment in March 2004. The critical issues that they found affecting the seven-county PTCOG region were:

- Water source deficiencies
- Lack of emergency supply interconnections among water systems
- Limitations on wastewater capacity due to discharge limits
- Aging infrastructure
- Political constraints barring equitable distribution of source water

The PTCOG report also provided recommendations for addressing water supply issues. The recommendations included water conservation and re-use programs, innovative water supply solutions, regional planning, and developing interconnections among systems.

ACTION STEPS

- ✓ Implement the recommendations from the PTCOG Water Supply and Wastewater Capacity Assessment.
 - Implement water conservation and water re-use programs.
 - Develop water shortage response plans.
 - Develop interconnected systems in case of emergencies.
- ✓ Create a regional water planning council to address water supply, water quality, and wastewater management issues.
 - Involve the Region's local governments.
 - Develop long-term, regional plans for increasing water supply and wastewater treatment capacity.
 - Seek state support for its planning efforts.
 - Identify ways to address water quality issues, including strengthening construction and development regulations, and working with PART to influence land-use guidelines.

Goal 4: Benchmarks

The bolded benchmarks and corresponding performance measures are the most significant.

- ✓ **Develop a regional, long-range transportation plan.**
- ✓ Create a Citizens Advisory and Advocacy Group to work with PART.
- ✓ Double the number of full-service truck stops in the Region.
- ✓ Increase high-speed internet access to 85 percent of the households in Yadkin, Surry, Stokes, Rockingham, Randolph, Montgomery, and Caswell Counties.
- ✓ Increase cellular service to cover all state roads in the Region.
- ✓ Hold regional roundtable discussions for solid waste disposal.
- ✓ Implement waste reduction programs across the Region.
- ✓ **Establish agreed-upon criteria for the future location of solid waste facilities.**
- ✓ Create a regional water planning council.
- ✓ **Increase water supply and water quality for each of the Region's counties, such that it is adequate to support growth through 2015.**

Goal 4: Performance Measures

- ✓ **Creation of a long-range, regional transportation plan.**
- ✓ Number of members of the Citizens Advisory and Advocacy Group for PART, and counties represented.
- ✓ Number of meetings each year between the Citizens Advisory and Advocacy Group and PART.
- ✓ Number of full-service truck stops in the Region.
- ✓ Percentage of households in rural counties with access to high-speed internet service.
- ✓ Percentage of miles of major roads in the Region with cellular service coverage.

- ✓ Number of attendees at solid waste roundtable discussions, and counties represented.
- ✓ Number of solid waste roundtable discussions each year.
- ✓ Per capita tons of solid waste sent to the Region's landfills.
- ✓ **Capacity of existing and planned solid waste facilities.**
- ✓ **Number of counties reporting a water supply shortage.**
- ✓ **Percent of the Region's natural waters (streams, rivers, etc.) that have poor water quality.**

GOAL 5: QUALITY OF LIFE ENHANCEMENT

The Region will be a place where people of all ages, incomes, and ethnicities want to live and have a high quality of life.

Quality of life is a subjective term that has a different definition for each individual. Basic quality of life factors, such as health and safety, are areas that most people can agree on. Preferences for cultural and recreational amenities differ for different types of people. However, having more choices that a Region can provide for its citizens is more likely to attract a diverse group of people who want to live there.

For the Piedmont Triad Region, enhancing its already high quality of life is about valuing its existing assets and providing a welcoming environment for diverse types of people.

Objective 1: Expand arts, cultural, recreational, and entertainment activities that will attract people from all parts of the Region.

Part of improving quality of life and making the Region an attractive place to live is enhancing the opportunities for social, cultural, and recreational enrichment. The Piedmont Triad Region has a great number of cultural and recreational assets, but they tend to be localized to individual cities or counties. As with tourism, increasing the market area for an event or attraction can make the Region's offerings stronger.

Greensboro and Winston-Salem have made important efforts to improving their downtowns and cultural amenities, but the result is often unnecessary competition. For example, both cities have their own symphony orchestra. A consolidated symphony might improve its quality and could still perform in the two cities. Another example is the new minor-league baseball stadium in Greensboro. Winston-Salem is also considering building a new stadium for its team. Such efforts may improve the amenities in the individual city, but they do little to unite and raise the overall profile of the entire Piedmont Triad Region.

ACTION STEPS

- ✓ Continue to work towards creating vibrant downtown areas that complement rather than compete against each other.
 - Encourage residential development in downtown areas.
 - Develop design standards that improve walkability, safety, and attractiveness of downtown areas.
- ✓ Create region-wide councils that facilitate sustained discussion and awareness of efforts in each county.
- ✓ Collaborate on plans and activities to achieve maximum impact.

- Consider the consolidation of certain cultural and recreational activities or organizations.
- ✓ Market events and activities to all parts of the Region.
 - Consider linking events and activities in multiples parts of the Region.
- ✓ Seek opportunities to use the assets of Greensboro and Winston-Salem in other parts of the Region.
 - For example, encourage the symphony orchestras to play in parks or other venues in the rural counties a few times per year.
- ✓ Identify potential funding sources to upgrade existing outdoor facilities and develop new parks, athletic fields, and children's play areas.
- ✓ Also identify ways to provide the Region's residents with more access to sustainable outdoor recreational activities in natural settings, such as hiking and biking trails or farm tours.

Objective 2: Work to attract and retain young people in the Region.

The need to attract and retain young people in the Piedmont Triad Region was an issue mentioned by many of the interview, focus group, and survey participants. The fact that the Region is older than its peer metro areas highlights this issue. The main reason that young people do not stay in the Region is lack of job opportunities, although social outlets and cultural or entertainment amenities are also factors.

The Region has a great number of colleges and universities, and it needs to retain its college graduates in the area, as well as encourage those who left the Region for education to come back. This group represents the future workforce, and the Region cannot afford the brain drain of losing them.

The city of Memphis has been successful in focusing on recruiting professionals. Their efforts included a “welcome wagon” through Leadership Memphis, a website with relocation information, and working with businesses to show their recruits around the city. Leadership Memphis attempts to engage new residents in their programs and helps to provide information to incoming residents even before they arrive.

Other strategies discussed in this report will help to retain the younger generation. Downtown development, development of the arts, and expanding recreational and entertainment activities make the Region more attractive from a quality of life viewpoint. Efforts to inspire young entrepreneurs and developing the target business clusters will help with job creation, which is a primary concern to many college graduates looking to start their careers. The following are additional recommendations for recruiting and retaining young people.

ACTION STEPS

- ✓ Create a graduate retention program, with a focus on helping them find jobs.
 - Work with businesses to create internship programs, particularly those that offer the prospect of employment after graduation.
 - Host job fairs that are target recent college graduates and are open to all of the Region’s colleges and universities.
 - Use alumni networks to reach out to college graduates.
 - Offer incentives such as loan forgiveness for college graduates to move to or stay in the Region.
- ✓ Emulate the efforts of Action Greensboro’s synerG organization in other parts of the Region.
 - Create social opportunities for creating networks among young people.
 - Consider hosting joint events with the Region’s entrepreneur, leadership, and business organizations.

- ✓ Work with the Region's businesses to introduce recruits to the area and help answer any relocation questions.

Objective 3: Improve air quality and exceed EPA air quality attainment standards in a way that enhances quality of life without hampering economic growth.

Eight counties in the Piedmont Triad Region are designated as Marginal non-attainment areas for eight-hour ozone levels. The main contributors of ozone are nitrogen oxide and volatile organic compounds, much of which come from coal-fired power plants and vehicles, and any business that uses combustion of fossil fuels in its operations. Also, the EPA has designated Guilford and Forsyth Counties as being non-attainment areas for fine particulate matter (PM_{2.5}). The cause of this pollution is similar to the cause of increased ozone levels.

The economic development consequences of non-attainment are restrictions on the pollutants of new or expanding businesses, and eventually, federal transportation funds could be withheld.

The Piedmont Triad Region submitted an Early Action Compact (EAC) plan to the EPA, which outlines a plan to reach attainment by the end of 2007. This delays the consequences associated with non-attainment until 2007. Some of the EAC strategies have been included in PART's work program. However, the EAC is not likely to be strong enough to make a significant improvement in the Region's air quality in the long term, particularly with the opening of the FedEx facility and other logistics-based businesses. Also, the EAC does not have the power to require the municipalities and counties to change their existing policies and actions. To really make a difference in air quality over the long run, the Region will need more drastic strategies that require the counties and cities to participate.

ACTION STEPS

- ✓ Involve the Region's transportation and land-use planning agencies in developing a long-term plan to improve air quality.
 - Discuss the feasibility of creating a single regional organization for sustained management and implementation of the plan.
- ✓ Implement stronger measures to achieve a real improvement in air quality.
 - Consider requirements such as stricter vehicle emissions testing and employer participation in transportation management solutions.
- ✓ Create an organization like Atlanta's Clean Air Campaign.
 - Establish this as the regional information resource for improving air quality.
 - Work with employers to educate them on commute program options.
 - Create an education and marketing campaign on the causes and consequences of poor air quality.
 - Create ride-matching database for carpools and vanpools.
 - Provide contests and incentives for commuters to use alternative transportation options.

Objective 4: Create a framework for region-wide, coordinated land-use planning that preserves greenspace and is aligned with transportation infrastructure plans.

Lack of land-use planning can contribute to sprawling land-use patterns and the demand for new infrastructure that may not have been necessary with proper planning. Good land-use plans can help reduce traffic congestion, maximize use of existing infrastructure, and concentrate development in the most appropriate places. Currently, many of the rural counties in the Piedmont Triad Region do not have zoning regulations or long-term land-use plans.

PART has begun the Region's first efforts to coordinate local land-use plans. It has established some land-use policy guidelines that have been adopted by many jurisdictions, but only a few have actually changed their development guidelines to reflect the policies. PART is in the process of creating a new set of land-use guidelines and has involved developers, builders, and financiers in the process to eventually get the support of elected officials.

ACTION STEPS

- ✓ Provide more support to PART for advocating adoption of transit-oriented development and land-use guidelines.
 - Educate citizens and elected officials on the value of land-use planning.
 - Use examples from other areas around the country that have been successful in their efforts.
- ✓ Encourage jurisdictions to review their planning and zoning regulations and create options for non-traditional development patterns.
 - For example, remove requirements that prevent transit-oriented development, such as set-backs and parking ratios.
 - Another example is removing zoning regulations that prevent mixed-use development.
- ✓ Support the development of the "Heart of the Region" as a pioneer project.
- ✓ Develop a regional greenspace plan.
 - Support the development and expansion of linear greenways.
 - Identify areas that would primarily be used for conservation and those used primarily for recreation.
 - Partner with the Piedmont Land Conservancy and the Land Trust for Central North Carolina in these efforts.

Goal 5: Benchmarks

The bolded benchmarks and corresponding performance measures are the most significant.

- ✓ Create region-wide councils for culture, recreation, and entertainment planning discussions.
- ✓ **Increase the proportion of the Region's population age 21 to 34 by 10 percent by 2010.**
- ✓ **Increase the proportion of college students staying in the Region after graduation by 10 percent by 2010.**
- ✓ **Achieve EPA attainment standards for ozone by 2007, and maintain attainment.**
- ✓ **Reduce fine particulate matter pollution in Guilford and Forsyth Counties to reach EPA attainment standards.**
- ✓ Create an organization like Atlanta's Clean Air Campaign.
- ✓ **Increase funding for PART by 40 percent by 2010.**
- ✓ **Develop a framework and agreements for coordinated land-use planning.**
- ✓ Develop a regional greenspace plan.

Goal 5: Performance Measures

- ✓ Number of attendees at region-wide cultural and recreational councils.
- ✓ Number of meeting each year of the region-wide cultural and recreational councils.
- ✓ Number of multi-county programs initiated by the cultural and recreational councils.
- ✓ **Percent of the Region's total population that is age 21 to 34.**
- ✓ **Percent of the Region's college students who stay in the Region after graduation.**
- ✓ **EPA ozone level attainment ratings.**

- ✓ EPA fine particulate matter attainment ratings.
- ✓ Annual funding for PART.
- ✓ Number of counties agreeing to coordinate land-use planning.
- ✓ Number of counties participating in the regional greenspace plan.

CONCLUSION

This *Regional Vision Plan* provides a blueprint for the Piedmont Triad Region's future. The Region has a tremendous opportunity to capitalize on its strengths and create a stronger economic future. To do that however, it must overcome leadership and communication obstacles that have persisted in the Region for more than 20 years. Achieving the Region's vision for the future involves addressing fundamental issues like education and workforce development. The Region must continue to leverage its best assets – quality of life, location, and its transportation network – to recruit and retain not only businesses, but also people.

There are no silver bullets for elevating the Region's profile and creating jobs in the Piedmont Triad Region. Attaining the goals outlined in this *Plan* involves hard work, making choices, and a willingness to change. The Region can achieve its vision with the help of a diverse set of stakeholders from all parts of the Region.

The goal, objectives, and action steps put forth in this *Plan* are just a starting point for progressing and lasting change in the Piedmont Triad Region. Although this document is a work plan for the next five years, priorities change based on changing conditions in the Region. As goals and objectives are accomplished, local focus may shift and the ideas and actions in this document should be modified to reflect this. The next and final component of the Region's strategic process is the *Implementation Plan*, which will focus on the organizations, funding, and timetable needed to successfully implement the Region's goals.