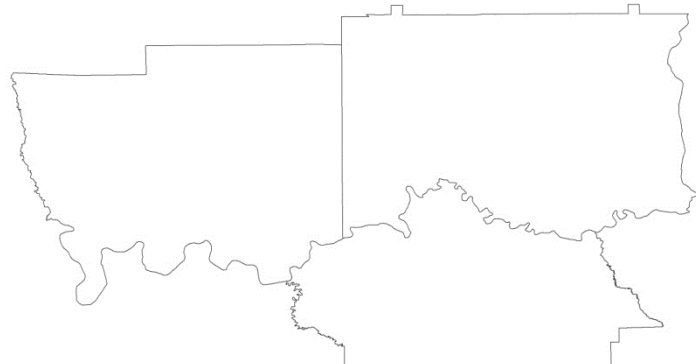


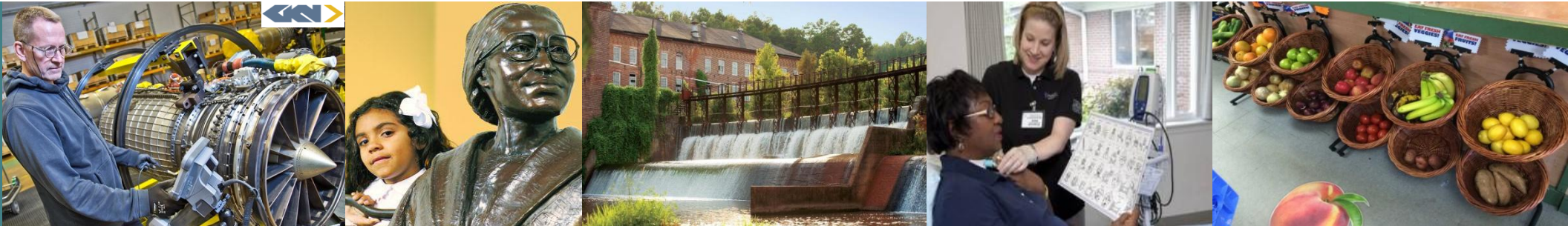


Central Alabama Regional Planning and Development Commission

CARPDC



CENTRAL ALABAMA



COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

GROWING COMMUNITIES TOGETHER

ACKNOWLEDGEMENTS

A Special Thanks to Participants of the CEDS Stakeholder Workshops

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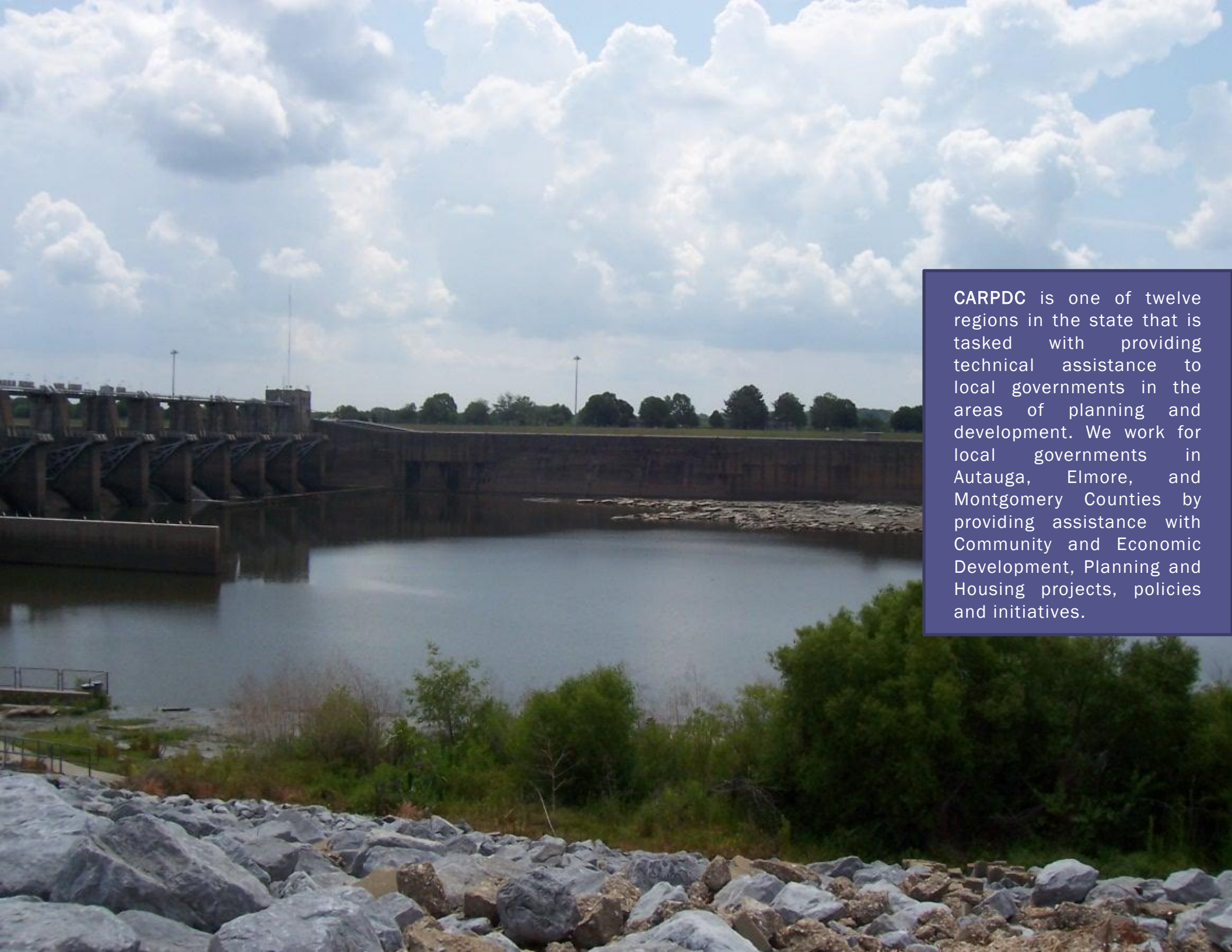


2017 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY REWRITE

Performed by:

Central Alabama Regional Planning and Development Commission
(CARPDC)

And Approved by their Board of Directors
February 8, 2018



CARPDC is one of twelve regions in the state that is tasked with providing technical assistance to local governments in the areas of planning and development. We work for local governments in Autauga, Elmore, and Montgomery Counties by providing assistance with Community and Economic Development, Planning and Housing projects, policies and initiatives.

Central Alabama Regional Planning and Development Commission

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY - 2017

“Growing Communities Together”

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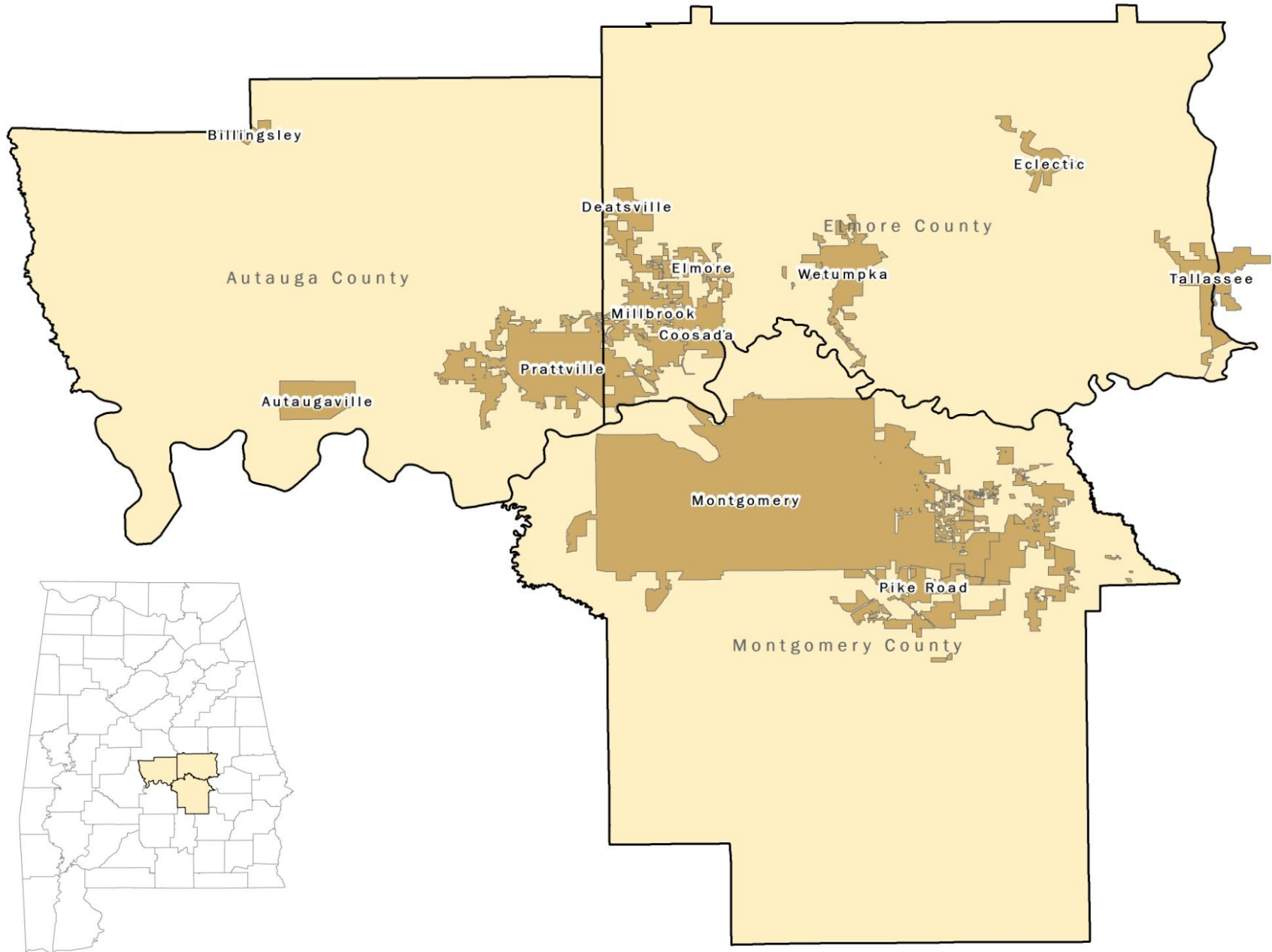
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THE CENTRAL ALABAMA REGION





CENTRAL ALABAMA

SECTION I | INTRODUCTION

2017 CEDS

SECTION I | INTRODUCTION

Background + Purpose

In 2015, Central Alabama Planning and Development Commission (CARPDC) produced a Comprehensive Economic Development Strategy, as its first formal act of participation in a continuous economic development planning process, as required by the Economic Development Administration (EDA) under its Economic Development District (EDD) program. While CARPDC has participated in the CEDS process for many years, we are proud to be doing so now as an officially recognized EDD.

This new 2017 CEDS represents a complete rewrite and reformatting of our earlier CEDS documents and will be the beginning of a continuous process to further economic development and economic resiliency in the Central Alabama Region.

The CEDS process is an opportunity for CARPDC to address economic development through a regional approach rather than just county by county.

Using this regional approach allows to address the economic changes occurring in our region in a more comprehensive manner and to begin building cooperation and coordination among the governments, agencies, businesses and special interest groups represented by our region.

Development of the 2017 CEDS will allow us to continue the economic development planning process begun in 2015; bringing together both public and private sector partners working together to develop and maintain regional goals and fostering economic competitiveness for our region.

An EDA approved CEDS is required in order for our region to qualify for federal investments under the Public Works and Economic Development Act of 1965. These EDA investments will serve to support and enhance public and private investments put in place to strengthen economic competitiveness in areas suffering from economic instability, distress or job loss.

The EDA requires a new or updated CEDS be developed every five years; this 2017 CEDS serves as this District's new plan.

During the upcoming five year period, the CEDS Strategy Committee and the staff of CARPDC will work together to monitor the region's economic trends and determine if modifications to the plan are needed. If it is determined that changes to the plan are needed they may be handled through amendments adopted by the CARPDC Board of Directors.

CEDS Strategy Committee

As part of the 2017 CEDS Update a new Strategy Committee is being formed. This Strategy Committee will act as the principal facilitator of the economic development planning and implementation process, and will be responsible for developing, updating, replacing and recommending amendments of goals and/or strategies. The Strategy Committee represents major community, business and economic development interests of our region, allowing us to access local skills and resources, as well as recognize the interests of all stakeholders. The Committee will include representatives of local governments, business, industry, finance, agriculture, labor, utilities, education, community organizations, public health agencies, the elderly, disabled, the unemployed, underemployed, racial or ethnic minorities, and women.

During the development of the Central Alabama region CEDS, two regional meetings were held to review conditions and determine issues throughout the region. Local issues were also brought to the table during these regional meetings, which included citizens, business leaders and elected officials from all three counties. Additionally, the plan document was made available during a 30 day period for public review and input.

The results of the meetings and the public input received, has enabled the CARPDC to formulate an initial plan of action to address economic development and resiliency from a regional perspective that is conducive to local growth.

Staff Support

The Strategy Committee has the full support and cooperation of the staff of CARPDC in carrying out the day-to-day functions required to ensure success of the process. These functions may include, but are not limited to, collecting and analyzing information on the area's economy, identifying strategy options, and preparing detailed implementation plans.

The Committee should ensure, through coordination with CARPDC leadership, that adequate staff resources are available to perform these functions.

Committee Work Program

The first functions of the Strategy Committee will be to develop a work program to provide the Committee with an agenda for carrying out its duties, establishing bylaws and making recommendations to the Board of Directors regarding adoption and amendment of the CEDS. The work program should describe tasks to be performed, identify the individual, organization, or work group responsible for completing each task, and establish timetables.

For the process to succeed, the Committee should take advantage of technical and financial assistance available from public and private sources. These sources include Federal, state, and local governments, foundations, educational institutions, local organizations, and major corporations. Under their planning, technical assistance, or economic adjustment programs, Economic Development Administration (EDA) support may be used to help organize or carry out the CEDS, and for updating or refining strategies.

KEY STATISTICS

363,564

2016 POPULATION
ESTIMATE

388,351

2040 POPULATION
ESTIMATE

36.4

MEDIAN AGE

\$50,618

MEDIAN HOUSEHOLD
INCOME

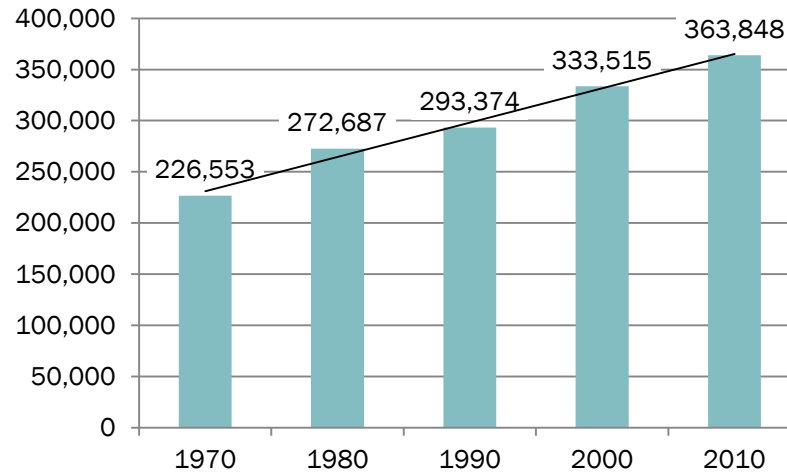
167,197

CIVILIAN LABOR
FORCE

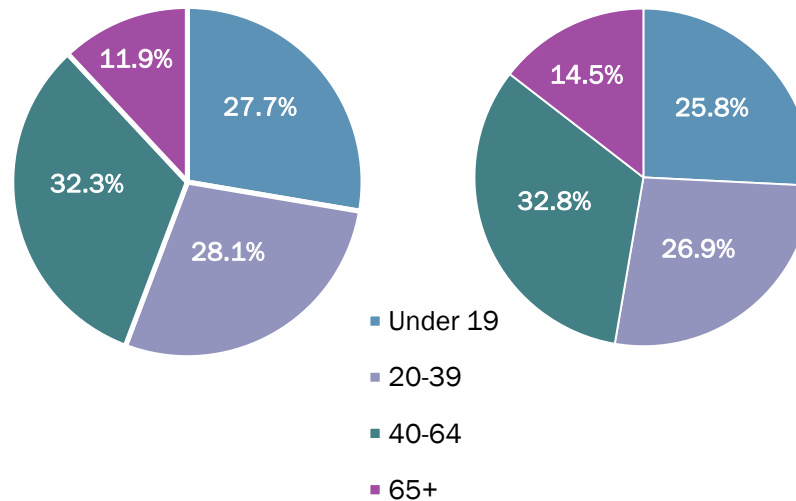
5.4%

REGIONAL
UNEMPLOYMENT RATE

POPULATION GROWTH (1970 - 2010)



AGE DISTRIBUTION (2010 - 2015)



MUNICIPALITY POPULATION

2010 | 2016 EST.

AUTAUGA COUNTY	54,660 55,416
ELMORE COUNTY	79,465 81,799
MONTGOMERY COUNTY	229,723 226,349
<hr/>	
AUTAUGAVILLE	870 854
BILLINGSLEY	144 141
COOSADA	1,224 1,214
DEATSVILLE	1,154 1,157
ECLECTIC	1,001 1,026
ELMORE (TOWN)	1,262 1,307
MILLBROOK	14,640 15,413
MONTGOMERY (CITY)	205,764 200,022
PIKE ROAD	5,406 8,777
PRATTVILLE	33,960 35,606
TALLASSEE	4,819 4,759
WETUMPKA	6,528 8,219





CENTRAL ALABAMA

SECTION II | REGIONAL DEMOGRAPHICS + ASSETS

2017 CEDS

SECTION II | REGIONAL DEMOGRAPHICS + ASSETS

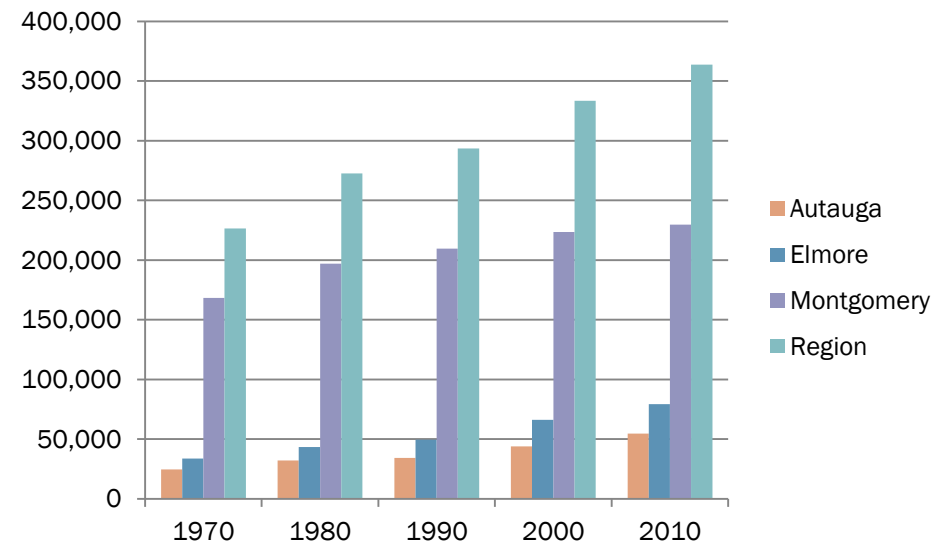
CENTRAL ALABAMA OVERVIEW

The Central Alabama region comprises three counties with a total landmass of approximately 2,060 square miles. This, when apportioned, equates to a population density of 177 persons per square mile. The 2010 Census estimated over 7,500 miles of roadway in the region – two of the most significant roadways are interstates 65 and 85.

Population Over Time

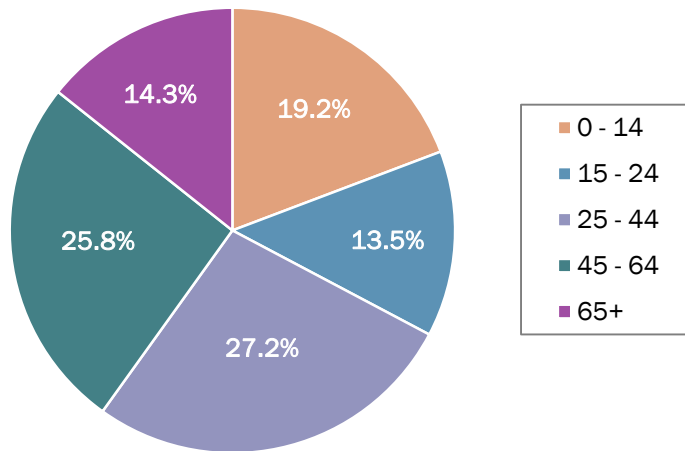
From 1970 to 2010, the population of the Central Alabama region increased substantially with each passing decade. Autauga and Elmore Counties grew exponentially (121.6% and 135.9% respectively) while Montgomery County’s population increased by 36.6%. In this forty year period, the overall regional population grew 60.6%; an increase that was predominately influenced by figures linked to Montgomery County’s population. The exponential growth in Autauga and Elmore possibly indicates that more of the population prefers to live in the rural areas while choosing to work and play in the more urbanized areas of the region.

Central Alabama Population by County, 1970 – 2010



According to the 2010 Census, the total population grew to 363,848 – a nine percent (9%) increase from the 2000 Census figure of 333,515 persons. Despite the overall increase, however, some municipalities had begun to show slight declines in population. Migration data grants more insight into the reasons behind these losses – some of the most common involve employment opportunities in other areas of the region and state.

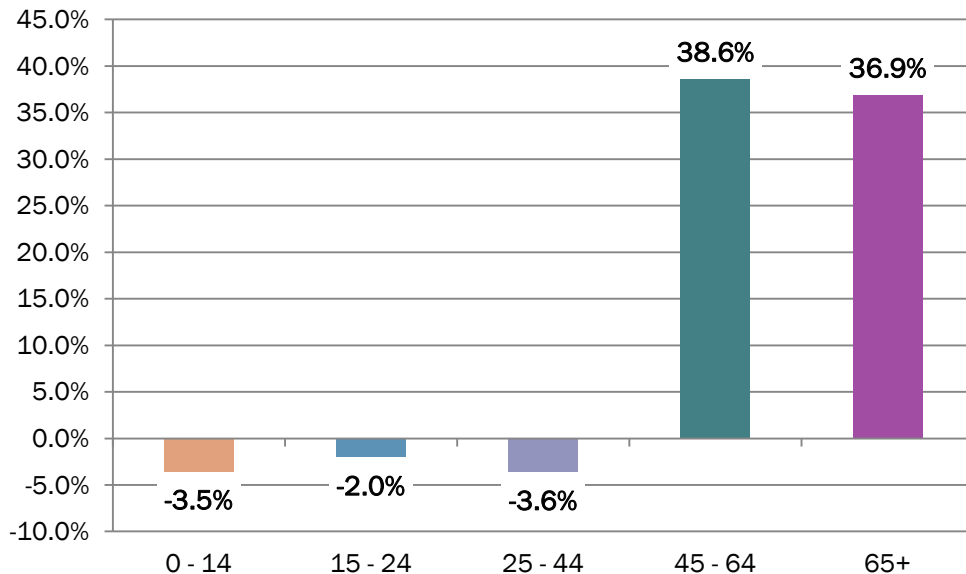
Regional Population Distribution by Age Cohort, 2016



Age + Population

The 2016 population estimates project the 25 - 44 group as the largest in the region. These individuals are pursuing professional degrees, jumpstarting careers, becoming entrepreneurs, and in some cases, starting families. In fifteen years, there has been a 3.6% decline in this age group, with similar trends in the 0 - 14 and 15 - 24 populations. On the other hand, the 45 - 64 and 65 and up age groups each increased by over 30%. Although the reasons for these occurrences may vary, this trend mirrors demographic shifts in other Regions throughout the country.

Regional Population Trends by Age Cohort, 2000 - 2015
Percent Change



Aging populations have proven to have significant impacts on economic growth. Pension systems receive less investment as the number of contributing individuals decreases; however, the number of retirees that rely on these systems for supplementary (or post-retirement) income increases. According to one publication, by 2030, the Census Bureau estimates that the number of working-age people available to support each retiree will fall from just over five today to barely three.^a

The demand on Medicare and the Social Security system will become more significant. Moreover, the need for specific services, transportation, housing, and employment opportunities will increase as the population continues to age.

[a] Source: <https://www.pbs.org/newshour/nation/how-america-can-overcome-the-challenges-of-an-aging-population>

CURRENT POPULATION + PROJECTIONS

Racial + Ethnic Diversity

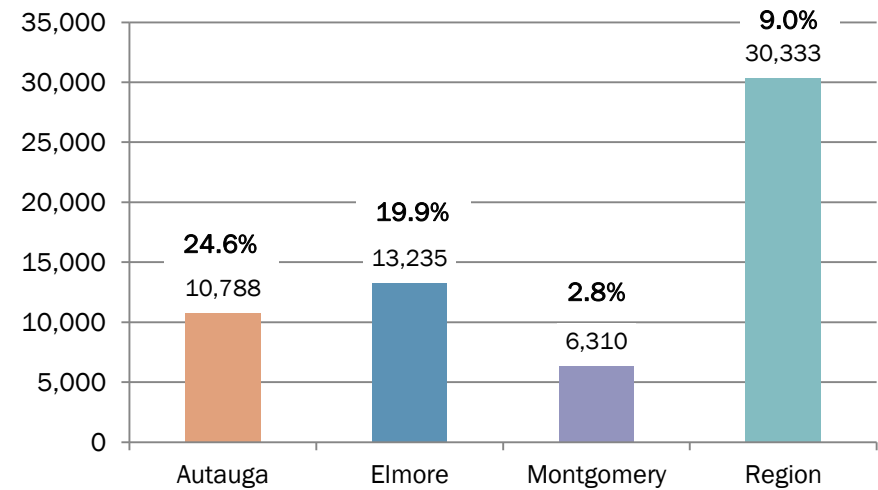
Over half of Central Alabama’s population is white (52.06%). Most of the region’s municipalities’ populations follow this trend; one exception is the City of Montgomery, where the population is 59.4% black. Since the 2010 Census, Central Alabama’s Hispanic population has grown an estimated 8.09%.

Population Change

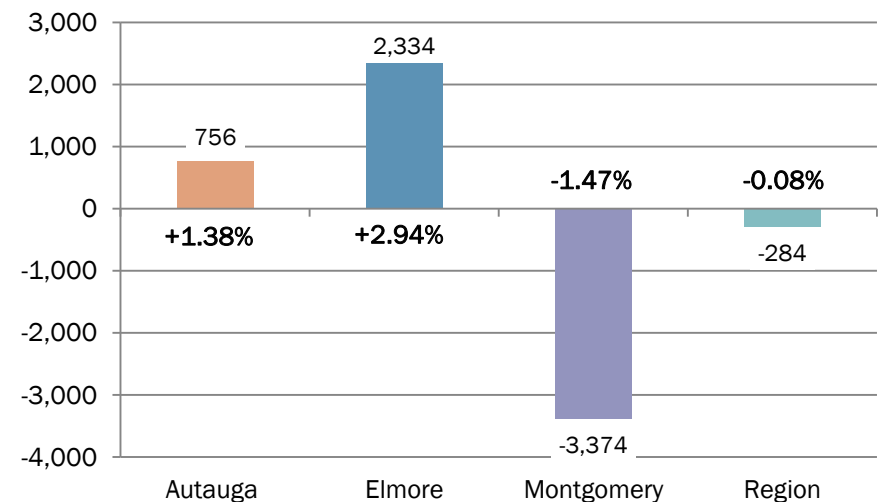
The American Community Survey (ACS) five-year estimates continue to report declining figures in multiple parts of the region. At the municipal level, most population gains and losses are modest; falling in the one to five percent range. On the other hand, there have been considerable population increases in some of our municipalities, such as Pike Road and Wetumpka.

The largest municipalities in the region are Millbrook (15,413), Prattville (35,606), and the City of Montgomery (200,022) while the smallest municipalities are Billingsley (141), Autaugaville (854), and Eclectic (1,026). Autauga and Elmore Counties continue to experience increases in population; Montgomery County’s population, however, has declined considerably despite Pike Road being one of the fastest growing municipalities in Central Alabama.

Regional Population Change by County, 2000 – 2010
Percent + Absolute Change



Regional Population Change by County, 2010 – 2016
Percent + Absolute Change



REGIONAL POPULATION PROJECTIONS (2020 – 2040)

	Census 2000	Census 2010	April 1, 2015 Est.	2020	2025	2030	2035	2040	2017 series	
									Change 2010 - 2040	
									Number	Percent
Alabama	4,447,100	4,779,736	4,855,847	4,941,485	5,031,739	5,124,710	5,220,021	5,319,305	539,569	11.28868
Autauga	43,671	54,571	55,333	56,705	58,464	60,327	62,388	64,771	10,200	18.69125
Elmore	65,874	79,303	81,357	83,991	86,641	89,231	91,708	93,933	14,630	18.44823
Montgomery	223,510	229,363	226,487	226,832	227,480	228,160	228,882	229,647	284	0.123821
Region	333,055	363,237	363,177	367,528	372,585	377,718	382,978	388,351	25,114	12.4211

Source: U.S. Census Bureau and Center for Business and Economic Research, The University of Alabama, March 2017.

CBER is the lead agency of the Census Bureau's State Data Center program and a member of the Federal-State Cooperative Program for Population Estimates and Projections. From these Census Bureau programs, the Center receives federally-produced population estimates and projections data and publications.

According to the Center for Business and Economic Research (CBER), the overall population of the Central Alabama region will increase by 12% by 2040; a figure that parallels the state's projected growth of 11%. The most significant increases in population will take place in Autauga and Elmore Counties, with Elmore County being the fastest growing in the region. It is anticipated that Montgomery County will begin recovering from these declines in 2020.

It is noted that CBER's projections were derived by population change between the last two Censuses as well as data provided by the Alabama Department of Health on births and deaths between 2000 and 2010 per each county.

The projected growth potentially increases the diversity of the population itself, which would in turn enhance the region's appeal to major industries. Diversity, with regard to population and workforce, is one of several items companies observe about an area when deciding to where to expand.

EDUCATION

National + State Education Trends – The Effects of the Great Recession

Public investment in K-12 schools – crucial for communities to thrive and the U.S. economy to offer broad opportunity – has declined dramatically in a number of states over the last decade. Worse, most of the most funding cutting states have also cut income tax rates, weakening their main revenue source for supporting schools.

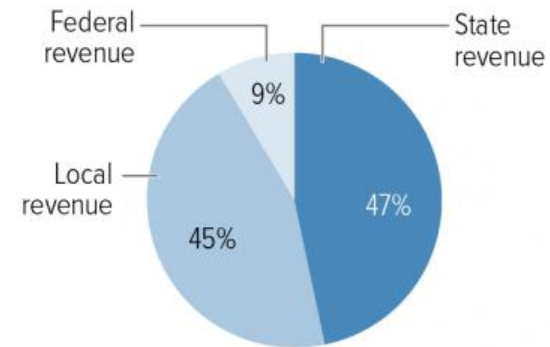
Steep state-level K-12 spending cuts have had serious consequences, some of which include weakening a key funding source for school districts, slowing the economy’s recovery from the recession and impeding reforms widely acknowledged to boost student achievement.

States typically distribute most of their funding through a formula that allocates money to school districts. Each state uses its own formula. Many states, for instance, target at least some funds to districts with greater student need (e.g., more students from low-income families) and less ability to raise funds from property taxes and other local revenues. However, typically this targeting doesn’t fully equalize educational spending across wealthy and poor school districts.^b

(b | Source: Center on Budget and Policy Priorities 2016)

States Provide Nearly Half of School Funding

Share of total K-12 education funding, 2014



Note: Numbers do not add to 100% due to rounding.

Source: Census Bureau, "Public Elementary-Secondary Education Finance Report, 2014 Data," June 2016

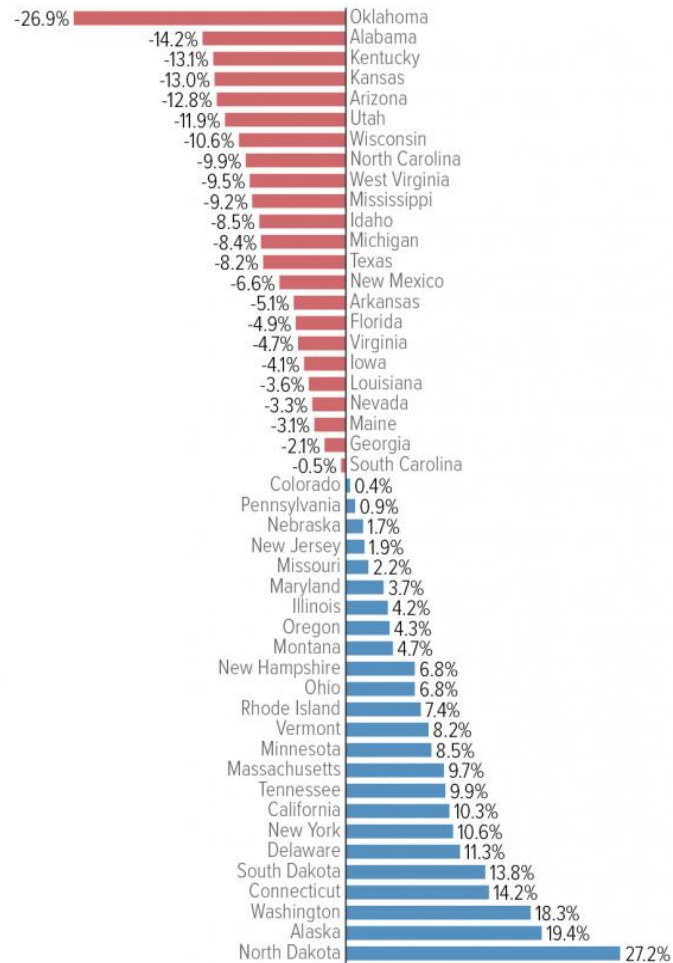
CENTER ON BUDGET AND POLICY PRIORITIES | CBPP.ORG

In Alabama, local public schools are chiefly dependent on state support, although many wealthier systems get a boost by raising local taxes and some poorer systems get more help from federal grants. The state’s school districts are still spending fewer dollars per student than they did in 2008, after adjusting for inflation. Alabama is one of few states that uses a resource-based formula to fund education. In 2015, 61 of the 136 school districts in the state spent more in federal funding than local funding. In 15 school districts, most of which are in Alabama’s Black Belt Region, federal funding made up more than 20% of overall dollars per student.^c

(c | Source: Alabama’s school finance formula outdated, unfair, experts say, 2016, and Funded: State Policy Analysis - Alabama)

State General Funding Per Student Still Lower Than 2008 in 23 States

Percent change in state formula funding* per student, inflation adjusted, fiscal years 2008-2017



*General or formula funding is the primary form of state K-12 funding. States also typically provide revenue for other, more specific purposes, such as bus transportation and contributions to school employees and pension plans.

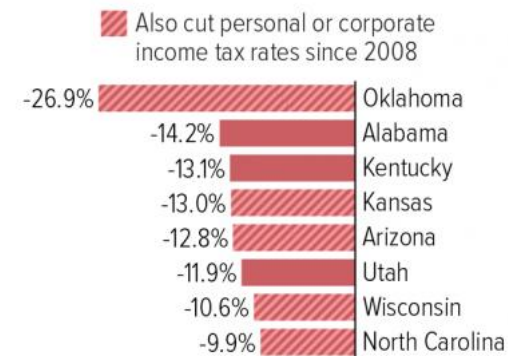
Note: Hawaii, Indiana, and Wyoming are excluded because the data necessary to make a valid comparison are not available.

Source: CBPP budget and enrollment analysis.

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Five of Eight States With Deepest K-12 Cuts Also Cut Income Taxes

States with deepest formula funding cuts,* 2008-2017



*General or formula funding is the primary form of state K-12 funding. States also typically provide revenue for other, more specific purposes, such as bus transportation and contributions to school employees and pension plans.

Source: CBPP budget and enrollment analysis.

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The Central Alabama region, for the 2014-2015 school year, spent between \$7,837 - \$8,272 per pupil. These expenditures comprise 70.4% state funding, 13.8% federal funding, and 15.8% local funding. Autauga County is noted as spending the lowest amount per pupil (\$645) in the state, which is a stark difference from the City of Mountain Brook's figure of \$12,162. Additionally, the City of Tallassee school system received the least amount of state funding, but provided the most local funds of any school system in the region.*

*Pike Road school statistics were not given.

Career + Technical Education Funding

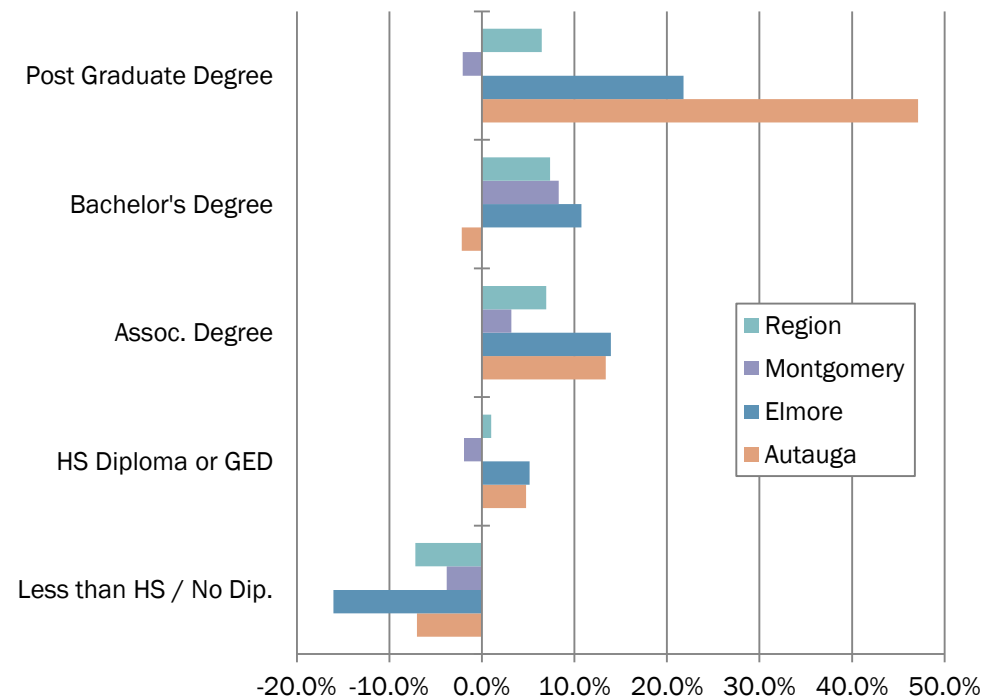
Alabama provides specific funding for career and technical education (CTE) programs. It does so in three ways: by applying multipliers to inflate the student count used to generate funding for secondary staff units; by funding salaries for dedicated CTE program staff; and through a program-specific allocation.

To account for CTE program costs, the state applies a multiplier of 1.4 to 7.4% of each district's seventh- and eighth-grade enrollment and a multiplier of 2.0 to 16.5% of each district's high school enrollment. This generates additional staff funding that districts may use for CTE programs. The state also funds Career Technical Education Directors and Career Technical Education Counselors for each school district, and provides separate funding for CTE program operations and maintenance.^d

Regional Educational Attainment

In 2015, the American Community Survey (ACS) estimated that 64.7% of the Central Alabama population completed high school and more than 19% of the population attained a bachelor's degree or higher. These figures represent an increase of 2% since the 2010 Census. Additionally, nearly a quarter of the Regional population earned associate's degrees.

Central Alabama Educational Attainment by County, 2010 - 2015



Science and engineering was the most popular field of study among persons 25 and older in the Region with a bachelor's degree or higher. *Business and arts, humanities, and others* were second and third, respectively. This trend is the same at the state and national levels. Similarly, Central Alabama mirrors Alabama and U.S. figures in the fields of bachelor's degrees reported. (Top fields are *business, education, and science and engineering related fields*.)

^d | Source: Funded: Alabama Report - A Detailed Look at Alabama's Funding Policies)

HOUSING

The 2015 Census shows housing in the Central Alabama Region includes a higher percentage, 73.1%, of single-family units than was reflected for the State of Alabama 70.2%; however, the Region's owner-occupied units were slightly lower, at 56.4%, than that of the state at 57.7%. This owner occupancy rate, for the Region, also reflects a 3.2% decrease from those shown in 2011 which mirrors decreases at the state level.

In the region, 39% of all residential structures have been built since 1990 compared with 37.2% for the state. When compared with the nation as a whole, it is clear that the age profile of housing structures in Alabama and the Central Alabama region, while similar, are significantly ahead of the age profile of housing in the country, with 30.4% of homes built during the same period.

According to the 2015 Census, the Central Alabama region also has a lower rate of vacant housing units 12.7%, than that of the State of Alabama at 16%, but is right in line with that of the U.S. at 12.3%.

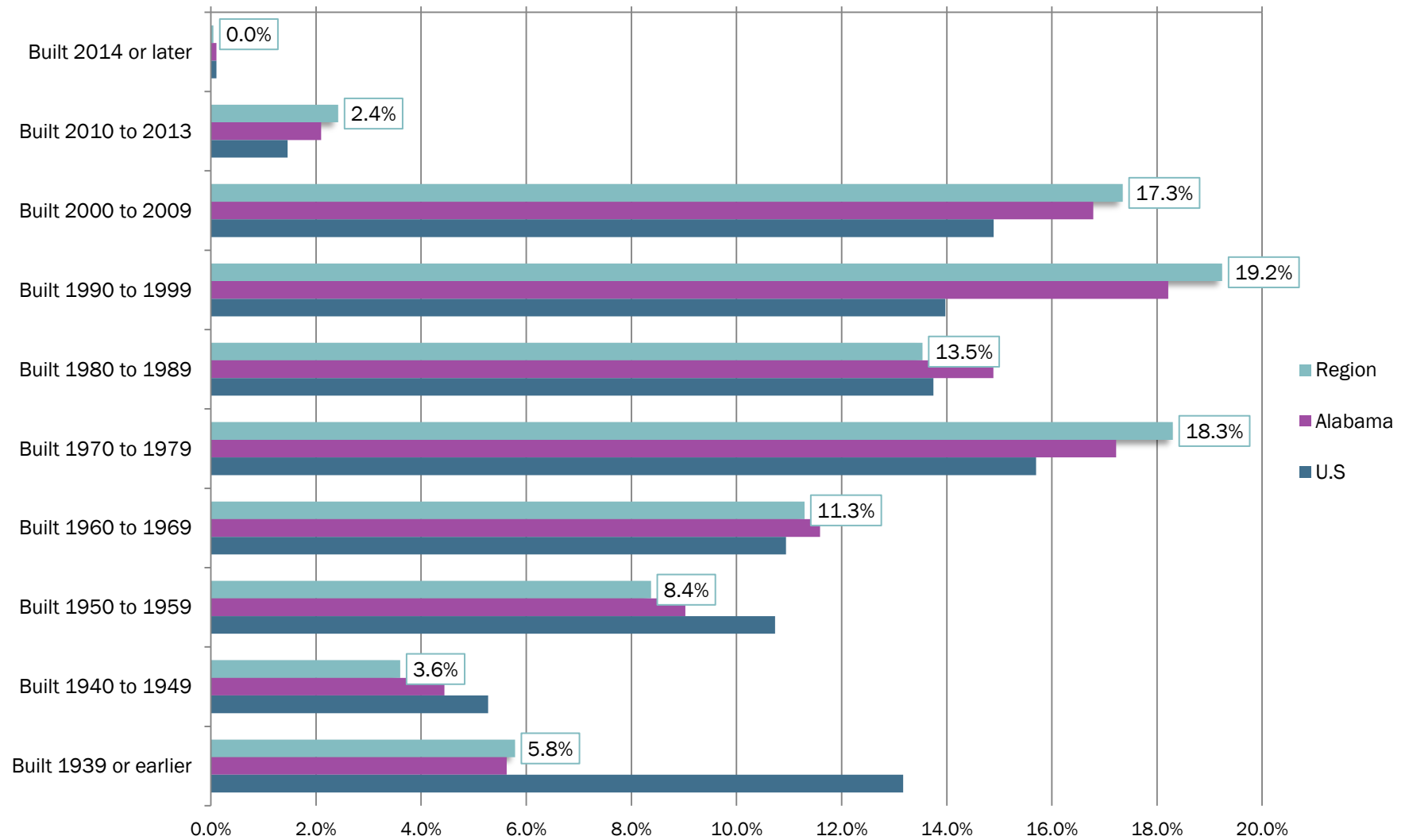
Occupied housing units in the Central Alabama region and the State of Alabama are far less reliant on fossil fuels than those in the nation as a whole. Fifty-three percent (53%) of the occupied houses in the Central Alabama region use electricity as their primary heating source.

Utility or bottled gas is only slightly lower in the region at 45.6% as compared to the state at 35.3% and nation at 53.4%. Additionally, in Central Alabama 0.6% of the housing units heat with fuel oil, kerosene or other petroleum fuels, slightly higher than the state at 0.2%, and substantially lower than the nation as a whole at 5.6%. Some 0.4% of occupied housing units in Central Alabama heat with wood, again less than the state at 1.1% or nation 2.1%. Solar and other alternative energy sources have barely been tapped as a source of home heating fuel.

STRATEGIC FINDINGS: HOUSING

The housing stock in the Central Alabama region is relatively new as compared to other parts of the county and provides a wide range of housing styles and price points from which residents may choose. The region has reliable sources of energy, affordable land for development and low taxes all of which make this area a desirable place to live, work and invest in new development. While housing starts slowed after the recent recession, as the economy improves it is anticipated that new development will once again reach robust levels of activity.

PERCENTAGE OF TOTAL HOUSING UNITS BY YEAR STRUCTURE BUILT (2010 - 2015)



HEALTHCARE

The Effect of Health on Economic Growth: Theory and Evidence (November 2001)^e examines previously under explored variables that micro-economists have identified as fundamental components of human capital: work experience and health. The main finding was that good health has a positive, sizable, and statistically significant effect on aggregate output. The authors central argument is that the in the past studies have identified labor quality narrowly with education and that this practice ignores strong reasons for considering health to be a crucial aspect of human capital, and therefore a critical ingredient of economic growth. Healthier workers are physically and mentally more energetic and robust. They are more productive and earn higher wages. They are also less likely to be absent from work because of illness (or illness in their family). Improvements to health and reductions in costly chronic diseases are key drivers of economic growth. Communities also need quality wellness, preventive and healthcare services; an adequate supply of trained healthcare providers; modern, accessible facilities; and a motivated, wellness-oriented population in order to achieve optimum public health.



(e | Source: *The Effect of Health on Economic Growth: Theory and Evidence*, November, 2011)

The consequences of poor public health and illness generate an economic burden to individuals, companies and regions. An unhealthy population generates costs in preventable healthcare expenditures; higher premiums from insurance companies; as well as greater costs to business and public expenditures on Medicaid and Medicare. These expenditures come at the expense of other investments. Unnecessary healthcare costs shift investments away from education, transportation, infrastructure, housing and businesses in the public and private sectors, all fundamental to economic growth, creating an unhealthy cycle. (NYAM, 2011).

Chronic Diseases constitute a major public health problem in Alabama. According to the Center for Disease Control and Prevention (CDC), the combination of a population that is aging, along with unhealthy lifestyle choices, will result in an epidemic of chronic disease that, "...will radically change the quality of life of our citizens and potentially bankrupt the healthcare system." In 2015, approximately 51,896 persons died in Alabama. The 2015 mortality rate was 909 deaths per 100,000 population, substantially higher than the national rate of 725 persons per 100,000 population. Alabama's mortality rate ranks third highest in the country. Deaths from chronic disease conditions accounted for a substantial portion of this mortality burden in Alabama.

The leading cause of mortality, both in Alabama and in the United States overall, was heart disease, followed by cancer.^f

Obesity in the Central Section continues to rise among adults and children, and is high across the region. According to a study by the Trust for America's Health and the Robert Wood Johnson Foundation, the percentage of obese adults in Alabama rose from 22.6% in 2000 (up from the 1990 rate of 11.2%) to levels released in August 2017 of 35.7%. This obesity rate places Alabama 3rd in the country for overweight and obesity among the 51 states. Likewise, Alabama's childhood overweight and obesity rates are high showing 16.3% for children 2-4 years of age; 35.5% for ages 10-17; and 16.1% for high school students.^g

The "Alabama State Nutrition, Physical Activity, and Obesity Profile" points out that 46% of adults in Alabama reported consuming fruit less than one time per day and 25.8% reported consuming vegetables less than one time daily. The participation in physical activity by Alabamians was reported as 45.4% of adults stated they achieved the equivalent of at least 150 minutes (2.5 hours) of moderate intensity activity per week. The level of activity in adolescents was reported at 24.8% stating they were physically active at least 60 minutes per day on all 7 days in the previous week.

^(f) | Source: Center for Health Statistics, Statistical Analysis Division)

^(g) | Source: Alabama State Nutrition, Physical Activity, and Obesity Profile 2016, CDC)

It is important to make healthy options available, accessible and affordable and to educate citizens on how excess calorie intake and physical inactivity contribute to obesity, which is associated with the leading “preventable” chronic diseases, including heart disease, stroke, diabetes and some cancers.^g

The data shows the average rate of obesity and overweight in the CARPDC region is approximately 32% with individual county rates as follows: Autauga 31.3%, Elmore 30.1% and Montgomery 34.6%. Overweight and obese populations in the Central Alabama region are potentially at higher risk for degenerative, chronic conditions such as diabetes, cardiovascular and cerebrovascular disease, arthritis and cancer.

In Alabama, combined with the rapid aging of the population, obesity has already fueled a dramatic increase in diabetes, from 6.1% in 1990 to 14.6% in 2016 and hypertension from 23.1% in 1990 to 40.4% in 2015. According to the Center for Health Statistics, death rates from chronic disease have varied by county in the Central Alabama region.^h From 2009-2015, Autauga County saw increases in deaths from cancer and diabetes and a significant decrease in those from heart disease. Elmore County saw increases in deaths from heart disease and diabetes, and a decrease in those from cancer.

Montgomery County saw an increase in deaths from heart disease but a decrease in those from cancer and diabetes. Overall, 2015 death rates from these diseases have remained high compared to those of the state and the nation as a whole.

STRATEGIC FINDINGS: HEALTH

A number of healthcare challenges must be addressed in the Central Alabama region: the high rate of obesity, the growing rate of chronic disease, particularly diabetes, heart disease and cancer; the disparity in access to healthcare between urban and rural populations and recruitment of physicians and healthcare providers to assure a sufficient supply of, and access to, effective healthcare throughout the Region. In addition, an increase in healthy eating habits needs to be developed through citizen education and access to healthy, local foods.

^{(h} | Source: StateofObesity.org: a project of the Trust for America’s Health and the R. Wood Johnson Foundation, 2017.)

REGIONAL DEATH RATES PER 100,000 POPULATION (2009 + 2015)

2015 Death Rates per 100,000 population					
	Autauga Co.	Elmore Co.	Montgomery Co.	Alabama	United States
Heart Disease	200.6	235.7	193.8	266.9	168.5
Cancer	231.3	178.0	202.2	213.0	163.0 (2013)
Diabetes	30.7	14.7	42.8	25.8	21.3
2009 Death Rates per 100,000 population					
	Autauga Co.	Elmore Co.	Montgomery Co.	Alabama	
Heart Disease	252.2	215.8	188.7	254.0	
Cancer	175.3	205.7	215.5	217.8	
Diabetes	27.6	13.9	45.1	27.0	

Source: Center for Health Statistics



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CENTRAL ALABAMA

SECTION III | INDUSTRY + ECONOMIC DEVELOPMENT

2017 CEDS

KEY STATISTICS

287,799

POPULATION 16
YEARS AND OVER

+15,885

NET JOB
INFLOW (2015)

\$40,117

PER CAPITA
INCOME

\$50,618

MEDIAN HOUSEHOLD
INCOME

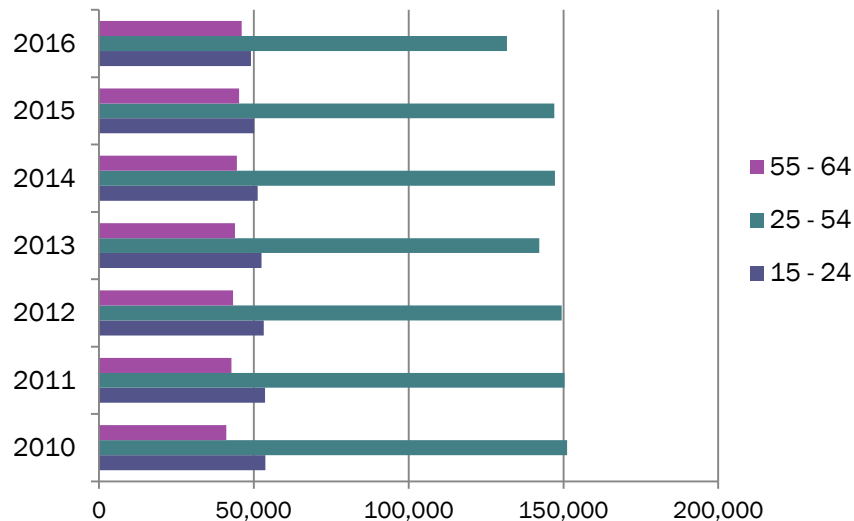
7,996

NUMBER OF
ESTABLISHMENTS
(2016)

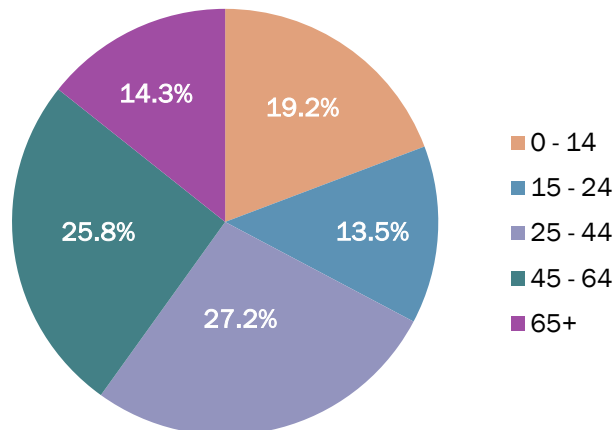
5.4%

REGIONAL
UNEMPLOYMENT RATE

WORKING POPULATION GROWTH
(2010 - 2016)



REGIONAL POPULATION
COMPOSITION (2016)



ANNUAL AVERAGE EMPLOYMENT
(2016)

TOTAL ALL INDUSTRIES :	119,732
GOODS PRODUCING :	23,569
SERVICE PROVIDING :	96,163
<hr/>	
NATURAL RESOURCES + MINING :	570
CONSTRUCTION :	5,347
MANUFACTURING :	17,651
TRADE, TRANSPORTATION + UTILITIES :	28,270
INFORMATION :	2014
FINANCIAL ACTIVITIES :	7,158
PROFESSIONAL + BUSINESS SERVICES :	19,709
EDUCATION + HEALTH SERVICES	17,721
LEISURE + HOSPITALITY	16,898
OTHER SERVICES	4,391

SECTION III | INDUSTRY + ECONOMIC DEVELOPMENT

SHIFTS ACROSS THE NATION

In 2017, the U.S. Bureau of Labor Statistics reported that national employment is projected to increase by 11.5 million over the 2016-26 decade, an increase from 156.1 million to 167.6 million. This growth, 0.7% annually, is faster than the 0.5 percent rate of growth during the 2006-16 decade, a period heavily affected by the 2007-09 recession.

As the labor force continues to get older, the **overall labor force participation rate is projected to decrease to 61.0% by 2026**. This rate is down from 62.8% in 2016 and from the peak of 67.1% in 2000, prior to the 2007 - 2009 recession.

As the baby-boom generation ages, the share of **workers age 55 and older** - a cohort with a low labor force participation rate - **is projected to grow to 24.8% percent by 2026**.

About 9 out of 10 new jobs are projected to be added in the **service-providing sector** from 2016 to 2026, resulting in more than 10.5 million new jobs, or 0.8 percent annual growth. The **goods-producing sector** is expected to increase by 219,000 jobs, growing at a rate of 0.1 percent per year over the projection decade.

Occupational employment is expected to increase by 7.4 percent between 2016 and 2026. All occupational groups are expected to add jobs over the projections decade except for the production occupations group, which is projected to decline by 4.1 percent.

***Healthcare support occupations** (23.2 percent) and **healthcare practitioners and technical occupations** (15.2 percent) are projected to be among the fastest growing occupational groups during the 2016-26 projection decade.ⁱ*

WORKFORCE OVERVIEW

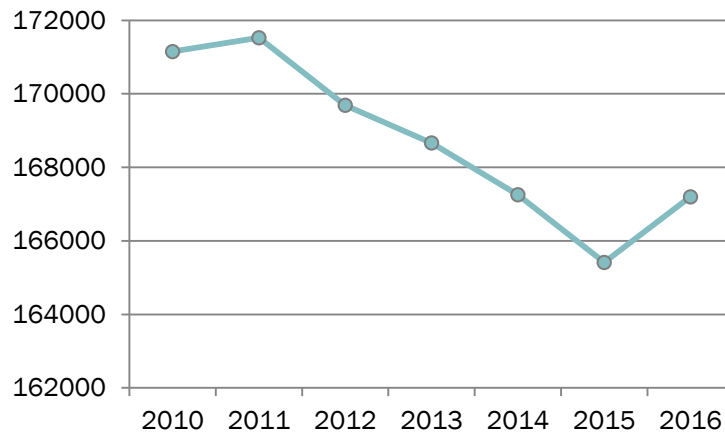
Central Alabama's civilian labor force grew by 18,464 persons (12.1%) between 2000 to 2010, reaching a peak high of 171,525 persons in 2011. Within the same time frame, regional employment increased from 143,376 to 154,685 (7.8%). From 2000 to 2016, both the labor force and employed populations fluctuated; ultimately resulting in employment increasing by 10.1% and the labor force growing by 9.5%. Labor force fluctuations paralleled activity at the state level, however, employment trends have not increased within the region as they have within the state.

(i | Source: Bureau of Labor Statistics 10-17 News Release)

INDUSTRY + WORKFORCE

LABOR FORCE + EMPLOYMENT STATISTICS

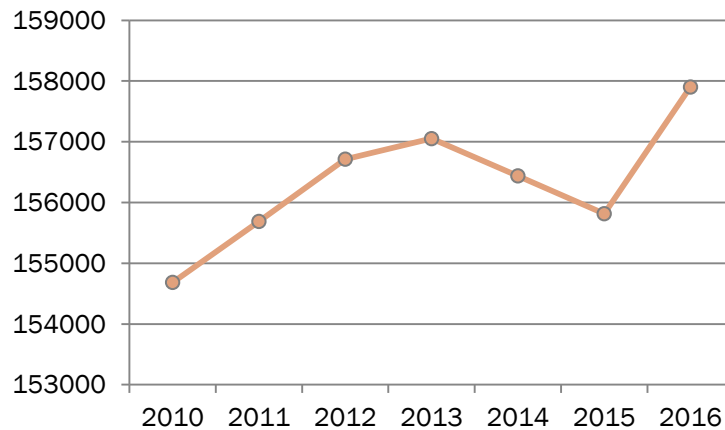
Regional Civilian Labor Force, 2010 - 2016



Central Alabama's labor force began to decline in 2011, falling nearly 1% each year until 2015, where the population began to show signs of increasing at the same rate.

	Autauga	Elmore	Montgomery	Region	Alabama
2010	25,713	36,683	108,753	171,149	2,196,042
2011	25,836	36,597	109,092	171,525	2,202,670
2012	25,740	36,629	107,320	169,689	2,176,337
2013	25,744	36,835	106,085	168,664	2,168,411
2014	25,610	36,567	105,077	167,254	2,162,386
2015	25,303	36,309	103,801	165,413	2,152,289
2016	25,649	36,726	104,822	167,197	2,168,608

Regional Employment, 2010 - 2016



Employment (the number of employed persons in the Region), on the other hand, increased by 2% over the last six years, peaking at 157,902 employed persons in 2013.

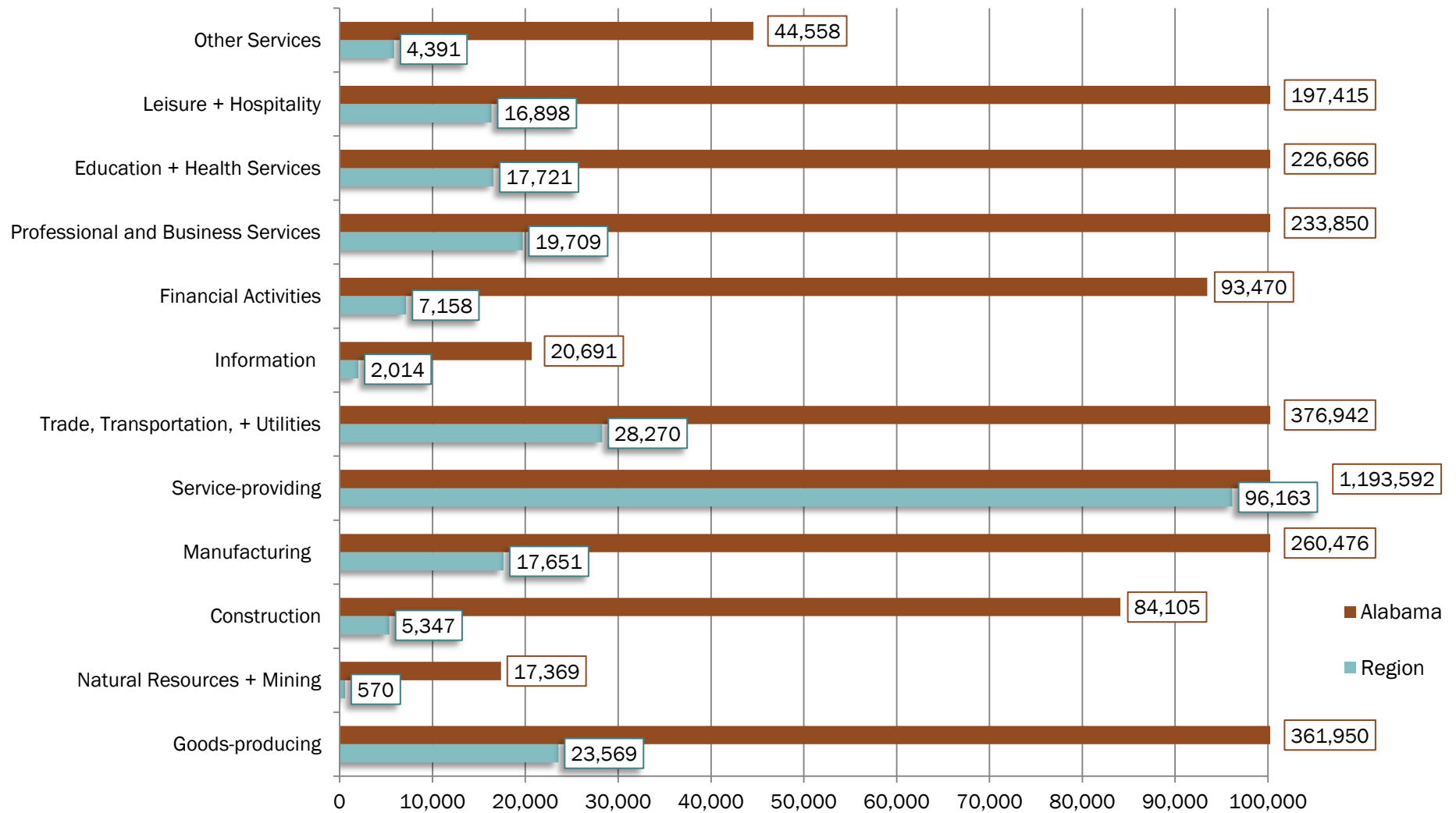
	Autauga	Elmore	Montgomery	Region	Alabama
2010	23,431	33,362	97,892	154,685	1,964,559
2011	23,677	33,521	98,491	155,689	1,990,413
2012	23,961	34,087	98,666	156,714	2,003,290
2013	24,140	34,565	98,347	157,052	2,011,636
2014	24,111	34,474	97,854	156,439	2,015,436
2015	23,971	34,461	97,384	155,816	2,020,675
2016	24,297	34,917	98,688	157,902	2,038,775

Since the last Census, unemployment trends in the region, as well as the state, have significantly changed- Central Alabama's trends by 76.7% and the state's trends by 43.9%. These impacts are reflected through the decline in Regional unemployment rate from 9.3% in 2010 to 5.4% in 2016.

Inflow and outflow figures collected on the region's labor market size indicate that there were 150,596 persons employed within Central Alabama Region in 2015. Almost 90% (134,711) of these individuals lived within the region. Data also shows an approximate net job inflow of 15,885 jobs.

Inflow/Outflow Report (2015)	
Selection Area Labor Market Size - Primary Jobs	
Employed in the Region	150,596
Living In the Region	134,711
Net Job Inflow (+)	15,885
In-Area Labor Force Efficiency	
Living + Employed in the Region	102,844
Living in the Region but Employed Outside	31,867
Employed in the Region but Living Outside	47,752
Inflow Job Characteristics	
Internal Jobs Filled by Persons Outside of Region	47,752
Workers Aged 29 or Younger	11,672
Workers Aged 30 to 54	26,211
Workers Aged 55 or older	9,869
Outflow Job Characteristics	
External Jobs Filled by Residents of the Region	31,867
Workers Aged 29 or Younger	8,704
Workers Aged 30 to 54	16,930
Workers Aged 55 or older	6,233

INDUSTRY AGGREGATIONS BY ANNUAL AVERAGE EMPLOYMENT (2016)



Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics

ECONOMIC DEVELOPMENT

Critical Issues

The following issues and barriers have been identified as the most critical to be addressed:

- **Need to revitalize the region’s downtowns and neighborhoods**
- **Need for improved workforce development, especially in healthcare and in preparation for industry growth**
- **Aging population, with growing demand for healthcare services**
- **Growing population with chronic diseases**

Vibrant Downtowns/Municipal Cores Challenged by Economy, Natural Disasters

Vibrant downtowns or town centers are at the heart of healthy communities and provide social and cultural experiences for residents in surrounding areas. Healthy downtowns have architectural and historical resources, including commercial buildings and traditional, time-honored geographic community centers with walkable pedestrian-based venues that represent the tenets of smart growth. Downtowns that offer quality, upper-story housing provide an opportunity to attract talent and investment.

It is a national and local trend that a talent-based workforce desires downtown housing options, diverse services, cultural experiences, and a legitimate “quality of place.” There is an increasing interest for downtown living within the ranks of young professionals, families, and retirees.

The downtowns and community centers in the Central Alabama region have unique and historically significant buildings; however, there is a large stock of buildings that require significant rehabilitation to make them viable for both commercial and residential tenants.

Revitalizing the Central Alabama region’s downtown centers will provide opportunities for smart and sustainable community development and growth, increased tax bases and ancillary economic benefits. A movement to revitalize the downtowns and community cores of the region is already underway in places like Prattville and Wetumpka and should be a priority of other communities in the region. Such a movement in the region’s town centers would not only improve a community’s “sense of place”, and economic base, but would also play a role in recapturing the value of surrounding neighborhoods that have underused or deteriorated public assets.

WORKFORCE DEVELOPMENT

Workforce Development Councils of Alabama

Prior to October 2016 there were ten (10) regional Workforce Development Councils (WDCAs) established to provide a direct link to the workforce needs of business and industry at the local level. After October 2016 the WDCAs were reconfigured into seven (7) regions. In both their forms, the Councils are business-driven and business-led and work with their member counties to develop a regional strategic plan and comprehensive workforce development system that supports local economic and job development activities. Additionally, the Councils make funding recommendations for grant applications submitted, based on the documented needs of the region as identified in their strategic plans.

Unless otherwise indicated the regional data used in this section has been derived from data and reports created during the period when there were ten WDCAs and the Central Alabama region was known as region 7, which included not only Autauga, Elmore and Montgomery counties, but also Butler, Crenshaw and Lowndes counties.

The following information is based on the “State of the Workforce Report X: Alabama” published in April 2016 through the University of Alabama.

Employment

Workforce Development Region 7 (WDR7) had an unemployment rate of 6.0 percent in March of 2016, with 10,961 unemployed. An underemployment rate of 26.2 percent for 2015 means that the region has an available labor pool of 56,289, which includes 45,328 underemployed workers who are looking for better jobs and are willing to commute farther and longer for such jobs.

Commuting Impacts

In Alabama net out-commuting increased more than 50 percent between 2005 and 2014 and commute times and distances jumped as well. This implies that congestion worsened and will remain a challenge particularly in major metropolitan areas such as Montgomery in the Central Alabama region. Persistent congestion can slow the pace of economic development and therefore continuous maintenance and development of transportation infrastructure and systems will be important.

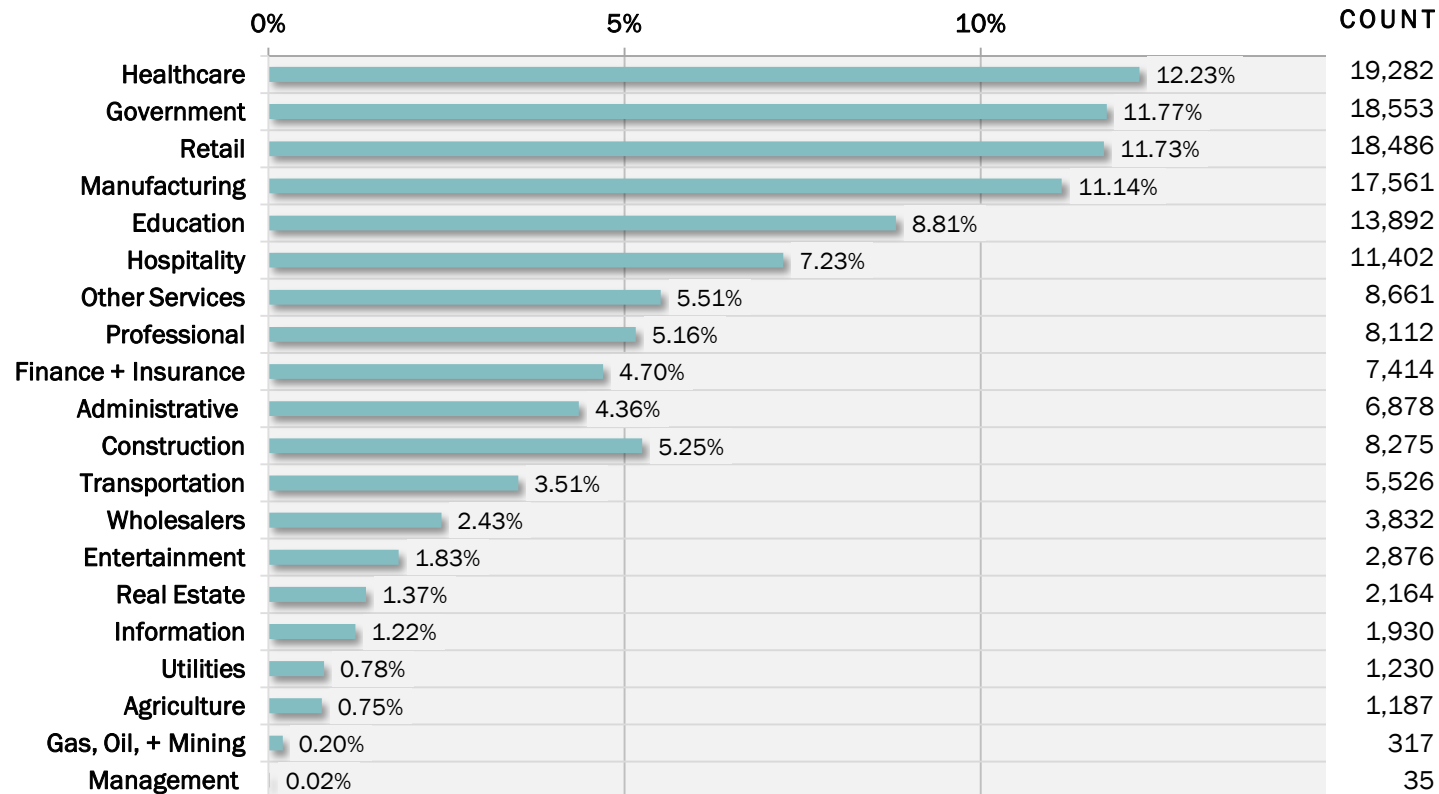
According to census data, within the Central Alabama region, the commuting numbers breakdown as follows: Autauga County has 6,286 employees commuting into the county for work and 16,426 commuting out; Elmore County has 10,773 employees commuting in and 23,503 commuting out for work and Montgomery County

has 61,408 workers commuting into the county and 22,653 commuting out for employment.#

MANUFACTURING

According to the 2016 State of the Workforce Report, by sector the top five employers in Alabama are manufacturing, healthcare and social assistance, retail trade, accommodation and food services, and educational services. These five industries provided approximately 58.9 percent of the state total, in the first quarter of 2015.

Based on 2015 data for the Central Alabama region the top five employers by sector (in descending order) are: healthcare, government, retail, manufacturing and education. These five industries provide approximately 56 percent of the region’s total jobs. The appearance of government in this list can be explained by the location of the Alabama State Capitol in the Central Alabama region (Autauga, Elmore, and Montgomery Counties) which is the center of State government activities and home to major government offices and functions.



Manufacturing appears in concentrated in pockets dispersed throughout the region. Major pockets appear in Prattville, Tallassee and Montgomery (city). The top twenty industries in the region are listed in the table below:

Top 20 Manufacturing Companies by Employment	
Hyundai	3100
MOBIS Alabama	1400
Koch Foods	1250
Rheem Water Heaters	1147
GKN Aerospace	1000
Glovis Alabama	832
US Foods	600
International Paper - Prattville	575
Neptune Technology	550
Glovis Logistics	545
Madix	494
Big Lots Stores	450
Lear Corp. Montgomery	440
DAS North America	417
Berry Plastics	370
STERIS Corporation	340
Hanil USA	330
Kowa Pharmaceuticals	330
Kinedyne LLC	184
Frontier Yarns	125

Shovel Ready Sites

For the purposes of this document a site is considered shovel ready if it has undergone the various permitting, engineering and expansion of basic infrastructure required for new construction based on a community’s desired development plan. By their nature and definition, shovel ready sites are equipped with the infrastructure needed for development including natural gas, electric services, broadband fiber, and municipal water and sewer. Rail service is also becoming critical infrastructure.

“Site certification remains one of the most effective site marketing tools for economic development professionals desiring to create a competitive advantage in successfully locating significant manufacturing operations. Certifying sites confirms site readiness to a point that creates a benefit in the site selection process, leverages job creation, and attracts capital investment.

For corporations desiring to locate manufacturing facilities, access to certified sites presents a unique site screening advantage that reduces overall site location risk, saves time, and reduces site development costs.”^j

“To meet the needs of industry, Alabama’s economic development community is working to designate an inventory of industrial sites with key

(j | Source: “Site Certification: Now More than Ever, A Critical Tool for Successfully Locating Projects”)

documentation for accurate, timely project evaluation. This documentation is crucial, as companies have less time and shorter deadlines in which to evaluate sites.

AdvantageSite is a voluntary program that allows communities to demonstrate due diligence has been done. This does not imply that other properties in Alabama don't meet the same criteria. It does mean designated sites have undergone a vetting process to show that important information about a site is readily available. A site awarded *AdvantageSite* designation has met certain standards related to ownership, accessibility, infrastructure, planning and zoning, and environmental and geotechnical due diligence.”#

There are twenty-three (23) Certified Advantage Sites across Alabama; the Central Alabama region is fortunate to have seven (7) of those within its borders. At least six (6) of these seven (7) sites are 100 acres or more; five (5) are located in Montgomery County, and one each of the remaining two are located in Autauga and Elmore counties. While these sites certainly provide industries wishing to locate in this Region a step up in the location process, these are not the only sites available across the region and it may well be that other sites are more suited to certain industries location or market needs. In Montgomery County there are a total of ten (10)

industrial sites with more than 4,000 available acres. The Montgomery Chamber is working to identify additional development-ready industrial sites in an effort to increase available site inventory. In Elmore County there are a total of six (6) industrial sites with more than 782 available acres. Autauga County has three (3) industrial sites and one (1) business park with approximately 696 available acres.

Broadband Communications

The information technology industry is expanding across the country, and Alabama has dialed into that progress. The state's IT companies generate almost \$1 billion annually and employ tens of thousands. As other notable Alabama industries such as automotive, aerospace and life sciences continue to develop, so will the need for cutting-edge technology. The minds trained to create those solutions are right here in Alabama.

More than merely a support system, information technology serves as a major stand-alone sector of Alabama's economy. The Alabama IT sector employs over 15,000 Alabamians and generates greater than \$1 billion in annual revenue across industries like banking and finance, government, education, consumer products, GIS and utilities.^k



4,400+

IT graduates in the Past Five Years



14

Four-Year Institutions with IT Degrees



11,000

Employed



\$1 Billion

Annual Revenue

In the Central Alabama region internet access is widespread with Montgomery County having 96.4% access to 25 mbps, in Elmore County 88.9% have access to 25mbps, and in Autauga County 77.0% have access to 25mbps. The rural areas of Autauga and Elmore counties suffer due to their distance from major metropolitan hubs which restricts business development, affects quality of life and limits opportunities.¹

Residents and businesses in these rural areas of the region who are without access to basic high speed internet service cannot participate effectively and fully in today's economy, limiting economic growth and educational opportunities. The lack of high speed service often means that (1) potential employees do not want to relocated

to the area; (2) current employees are unable to telecommute; (3) healthcare providers are unable to extend telemedicine to remote areas; (4) large companies and the universities cannot transfer or exchange large volumes of data; (5) farmers are unable to start new value-added enterprises to enhance their earnings; and (6) residential property values are depressed where internet is unavailable or prohibitively expensive.

In early 2016 the City of Montgomery announced the formation of a partnership to establish the exchange, known as MGMix, the state's first Internet Exchange, a facility where Internet service providers and networks of proxy servers exchange Internet traffic. A few months later, officials announced a cyber strategy for Montgomery that would involve collaboration between business, military, government and universities. The 100 Gig benchmark is seen as crucial to attracting companies that handle large amounts of data, such as Netflix, Amazon, Microsoft and Apple. In addition, Auburn University at Montgomery has signed a peering agreement to become the first university to join MGMix. This Internet Exchange has the potential to not only change the economic outlook for the City of Montgomery and Montgomery County but for the Central Alabama region as a whole.

(1 | Source: <https://broadbandnow.com/Alabama>)

In the long term there is a need to extend broadband to the rural areas of our region in response to the need for greater access to high-speed data. Doing so will increase our global competitiveness and advance our strategic economic development priorities, including:

- Seamless healthcare information exchange, which requires equitable digital transmission of patient records, telemedicine, and creation of virtual rural clinics
- Regional entrepreneurial business development, including the needed strategies to retain college and university student talent in the Region
- Attraction of new business development, especially those reliant on data processing and transmission and open-access fiber networks
- Partnerships between universities and the private sector to bring about advancements in technology and encourage research and development collaboration among the Region's colleges and universities.
- Promotion of the region as a tourism destination, as well as increased support for other visitor-related businesses in the more rural areas of the region.

- Telecommuting for employees living in rural areas and/or for organizations that have embraced green initiatives to reduce mass commuting in single-occupancy vehicles

Healthcare

As mentioned earlier, the Healthcare industry is the number one employer in the Central Alabama region.

Attracting and retaining highly skilled health care professionals, together with integration of new technology, are fundamental in assuring effective and efficient delivery of healthcare services in the Region.

Increases in chronic diseases, and costs associated with managing them, will be major factors affecting economic growth. It is believed that chronic disease prevention and chronic care improvement will be two of the fastest growing fields in healthcare.

Healthcare occupational projections for the Central Alabama Works region for the period 2014-2024 reflect significant opportunities for growth. Of the top fifty occupations with the largest projected number of annual openings in the region four are in the field of healthcare. Registered nurses are projected to show a 1.20

percent annual growth rate with a 12.63 percent change for the 10 year period; Nursing Assistants are projected to show a 1.36 percent annual growth rate with a 14.48 percent change for the period; Personal Care Aides are projected to show a 2.23 percent annual growth rate with a 24.71 percent change for the period; and Home Health Aides are projected to show a 2.58 percent annual growth rate with a 28.97 percent change for the period.

Demand for workers across all healthcare occupations is projected to grow by some 0.76 percent during the ten year period from 2014-2024. In Central Alabama, the challenge is the anticipated shortages. Average job openings during the period are estimated at 9,940 while potential projected replacements are projected at only 7,310. Workforce shortages, predicted in healthcare occupations also provide opportunities for collaboration at several levels. The region's colleges and community colleges currently collaborate with healthcare providers and offer a full range of education programs to support the sector.

Aging Population

The Center for Demographic Research at Auburn University Montgomery estimates that that the Central Alabama population, age 65 and over, will increase by some 82% during the two decades between 2015-2035. By county this increase breaks down as follows: Autauga = 107%; Elmore = 108%; and Montgomery = 65%. Overall the increase in our region's senior populations will be 24% of the total Central Alabama population by 2035.

American Community Survey 2016 data estimates that, at present, some 31,625 Central Alabama households include at least one person over the age of 65, or 22.6% of all households in the region. Of those households, an estimated 13,996 are one-person households where the resident is 65 or older and living alone, or some 10% of Central Alabama households. As these individuals age over the coming two decades, it is likely that their need for proximity to medical services, and resources required for daily living, will increase and that generally their ability to live independently may be compromised.

Genworth Financial, source of an annual Cost of Care Survey canvassing long-term care providers nationally, predicts two thirds of individuals over 65 will require home or institutionally-based long-term care during their remaining lifetimes.

Genworth's Alabama State-Specific Data from the 2017 Cost of Care Survey reports the median annual cost of institutional nursing home care in the Montgomery area is approximately \$79,000 per year, while annual median costs for assisted living in the region are about half as much. Home health aides or licensed housekeepers delivering services in a home-based environment can cost nearly \$37,000 annually. Clearly, these expenses threaten to be a burden in the future.^m

There are a variety of living options for aging individuals in Central Alabama ranging from Assisted Living and Retirement Communities to Nursing Homes and Alzheimer's care facilities. While these facilities may be adequate for current needs, with the projected growth rates and the increasing rate of retirement for baby-boomers, it is important that attention be given to maintaining an adequate level of service. As baby-boomers age many may seek housing in age-friendly communities where transitions from levels of need are not accompanied by relocation from known communities and friends.

ECONOMIC RESILIENCY

The SWOT Analysis conducted by the CEDS committee identified a variety of vulnerabilities that have caused or could potentially cause major economic problems, both locally and regionally. According to EDA, "in the context of economic development, economic resilience becomes inclusive of three primary attributes: the ability to recover quickly from a shock, the ability to withstand a shock, and the ability to avoid the shock altogether." EDA further states that these shocks or disruptions can often be categorized in the following ways:

- Downturns or other significant events in the national or international economy which impact demand for locally produced goods and consumer spending;
- Downturns in particular industries that constitute a critical component of the region's economic activity; and/or
- Other external shocks (a natural or man-made disaster, closure of a military base, exit of a major employer, the impacts of climate change, etc.)

In the past, the Central Alabama region has experienced a number of shocks to the economy among them are flooding of residential and business districts, an economic recession, and the closing of a number of major employers across the region.

Flooding and residual damage from coastal storms have been the primary causes of property damage in the region. Additionally, we have seen, by the experiences of other regions such as West Alabama, how devastating a major storm event can be in terms of loss of life, property damage and the destruction of major economic generators. While most of our counties Hazard Mitigation Plans comprehensively address mitigation of casualties and property damage there is little if any discussion of economic resiliency. In other words, how will we address the expeditious recovery of the major tax generating businesses and industries in our communities?

Economic resiliency efforts need to be developed and put in place in our region in order to quickly put our local governments back on their feet financially in order that they may reestablish services to their citizens.

Economic Resiliency is not only discussed in this section of the CEDS, but is actually woven throughout the entire document. The purpose of this chapter is to discuss how resiliency is a multi-faceted issue with many different components. However, the overall purpose of economic resiliency is to save and create as many jobs as possible, so that when a shock occurs, which is inevitable, the community, region, and people have options.

Economic vs. Physical Shocks

When examining the types of shocks that a community needs to plan for, most can be categorized in one of two ways, economic shocks and physical shocks. Economic shocks are those which are caused primarily by economic forces such as the closing of a major factory that results in great loss in employment, a national recession, or a change in regulations that affect importing and exporting. Physical shocks are those which cause harm to either the built or natural environment, or both, such as flooding, tornadoes or a hurricane. Obviously physical shocks are economic in nature as well, so the issue is not just repairing the physical damage, but repairing the economic damage caused by destroyed property and loss of income and businesses. Whether the shock comes as an economic shock or a physical shock, it's important that all aspects of the community be resilient: people, the built environment, and industries.

Hazard Mitigation

Economic resiliency is important for both economic shocks and physical shocks, but hazard mitigation is a tool that is mainly focused on physical shocks. Hazard mitigation planning is often focused primarily on natural disasters in which we usually have some advance warning, but hazard mitigation should also focus on physical

shocks that come with no warning. Each county in the Region has adopted a hazard mitigation plan which outlines how to prepare for and react to hazards and the resources available in the event of a disaster. These plans can be found by visiting the appropriate county's website. The Alabama Emergency Management Agency website, www.ema.alabama.gov, and also www.ready.gov offer information about planning for and responding to many different types of disasters.

COMBATING ECONOMIC AND PHYSICAL SHOCKS

Creating Resilient People

- **Education** – In order to have a resilient workforce, training and education should support local industry and should be adaptable and flexible enough to change as new industries emerge, or as existing industries grow and evolve over time.
- **Communication** – The Region should strive for excellent communication, whether it involves communication about jobs and training opportunities, or advance warning for storms and disaster preparedness.
- **Quality of Life** – Healthy, happy people tend to be more adaptable and resilient in times of hardship and an excellent quality of life can make an area marketable and appealing to new industry.

- **Safety** – Providing a safe environment, either on a daily basis through good building and infrastructure, or during a time of physical crisis, such as the availability of shelters and efficient evacuation routes during a storm.

Creating Resilient Environment

- **Structures** – Implementing building codes that result in strong construction create a built environment that is less vulnerable to natural disasters, and will sustain the test of time.
- **Infrastructure** – New and up to date infrastructure that is stronger and more resilient, that can withstand a natural disaster, is a marketable feature for recruiting new industry.
- **Land suitability** – Building on land that is most suitable for development reduces vulnerability to natural disasters.
- **Site Redevelopment** – Redevelopment of an existing or underutilized site is often more efficient and cost effective than developing a new site.

Creating Resilient Industry

- **Diversity** – The Region should strive to have a diverse industrial base. The old saying, “Don’t put all your eggs in one basket,” applies here. For example, a textile plant closing won’t impact tourism or automotive industries.

- **Adaptability** – As technologies changes and economies wax and wane, industry needs to be adaptable to the current market and the workforce should be adaptable to meet those changing needs.
- **Innovation** – Industry innovation often goes hand in hand with diversity and adaptability and often occurs as a response to a physical or economic shock.

ECONOMIC DEVELOPMENT OPPORTUNITIES TO PURSUE

The following economic development opportunities are among those identified by the CEDS Committee, in the SWOT analysis, as essential drivers to strengthening the region's economic development efforts:

Tourism

- Capitalization of cultural, historical, and natural history assets
- Improve marketing of entertainment and tourism activities

Improvements to Alternative Transportation System

- Multi-use trails, bike lanes, sidewalks, share the road programs
- Improve perception of alternative modes of transportation

Better Use of Educational Resources

- Workforce development
- Increasing opportunities for Pre-K Programs

Improve Education

- Use H.S. education as an opportunity to make graduates workforce ready
- Improve Vocational Education
- Engagement of technical workforce instructors

Develop International Relationships

- Development of sister-city programs
- High School Exchange
- Foreign Officers School

Support the State's efforts with Black Belt Counties

- Black belt commission
- I-85 Improvements

Marketing of Region

- Joint Marketing for economic and tourism for entire region
 - Improve social media presence
 - Improve visibility of communities along interstate highways
 - Increase awareness of Regional airports and their services

In identifying these opportunities, the Committee understood that they were laying the groundwork for the strategies that would evolve over time from collaborative thinking, risk-taking and an aggressive entrepreneurial spirit. The Committee believes the Central Alabama region has the potential to be a leading, business-friendly climate, with an exceptionally trained workforce that assists employers of every size, from major universities to small rural-based business operations.



Autauga Creek is the largest of Autauga County's creeks. It serves as a focal point for the downtown area and is the site of the historic Pratt Mill at the heart of downtown. This creek is also used for recreation by residents and tourists kayak and canoe. Many of the Region's creeks generally run from a higher elevation in the north and flow south into the Alabama River..



CENTRAL ALABAMA

SECTION IV | NATURAL + RECREATIONAL ASSETS

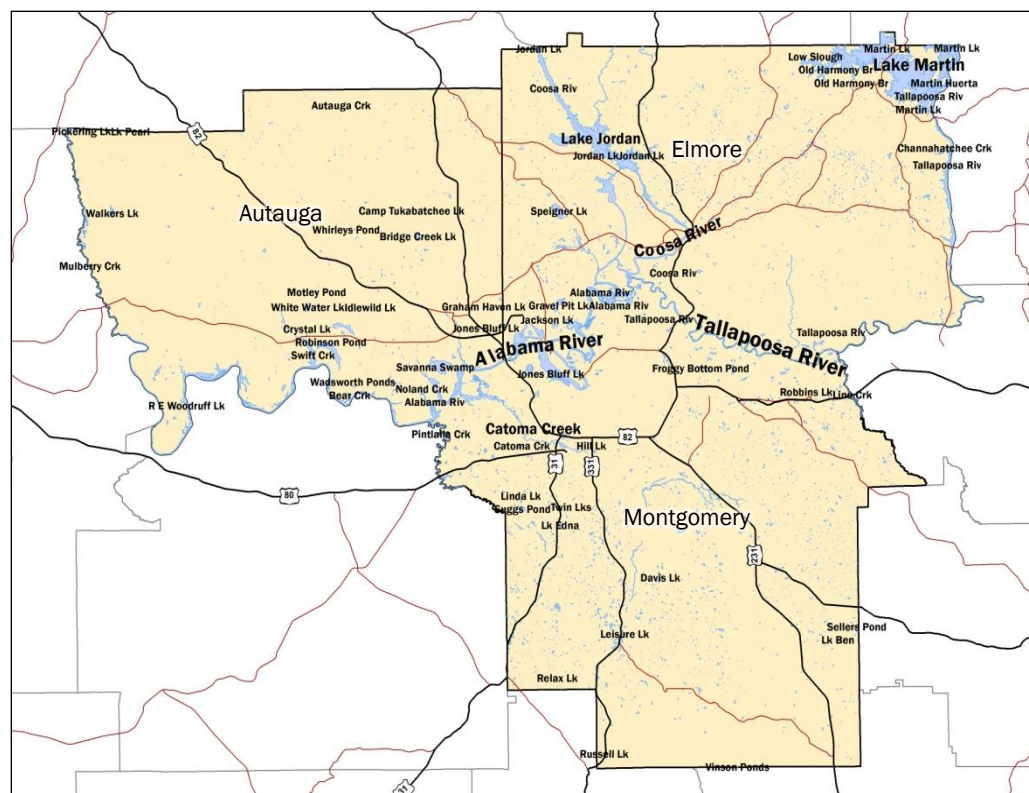
2017 CEDS

SECTION IV | NATURAL + RECREATIONAL ASSETS

NATURAL RESOURCES

The Central Alabama region has an abundant supply of natural resources including rivers, creeks, lakes, and forestland. Many residents in the region often refer to the area as the **River Region** due to its number of rivers. The region features the headwater of the Alabama River, formed at the confluence of the Coosa and Tallapoosa Rivers in Elmore County, four miles southwest of Wetumpka, and ten miles north of Montgomery. The area also features two large lakes, Lake Martin and Lake Jordan. These lakes offer area residents and tourists recreational opportunities including fishing, water sports, and boating. These lakes also provide essential power to the region through hydropower generation.

Autauga County features the Alabama River, which forms its boundary with Lowndes and Montgomery Counties. In addition to the river, there are a few significant creeks including Autauga Creek, Mulberry Creek, Littler Mulberry Creek, and Swift Creek.



North Autauga County is the site of numerous spring water sources. The springs in this area are rare in Alabama and produce very pure water. This natural resource has prompted recent investment by a water bottling company for production in Autaugaville.

Elmore County is the site of four large man-made lakes: Lake Martin, Lake Jordan, Yates Lake and Thurlow Reservoir. Alabama Power, the state's largest utility company, owns and manages the lakes. These lakes offer many forms of recreation and generate significant property and sales tax revenue for Elmore County and its municipalities.

Lake Martin is a large reservoir formed by the Martin Dam and Tallapoosa River. When Alabama Power created the lake in 1926, it was the world's largest man-made lake at the time. Lake Martin's shoreline equals 880 miles, second only to Lake Guntersville. Elmore County's portion of the lake's shoreline equals 201 miles, or 23% of the lake. The far northeastern section of the county borders the lake. Only Tallapoosa County has more Lake Martin shoreline. Alabama Power's Martin Dam has produced hydropower on this lake since 1926. The lake is one of the largest recreational sites in the state, and is an ideal natural playground for boating, sailing, fishing, skiing, wake boarding, and camping.



Lake Martin covers 41,150 acres across 880 shoreline miles, with 201 miles of shoreline bordering Elmore County.



Lake Jordan

Lake Jordan is a reservoir on the Coosa River that covers 4,480 acres in Elmore County. Similar to Lake Martin, it also produces hydropower for Alabama Power Company. Although much smaller than Lake Martin at just 118 miles of shoreline, Lake Jordan is also used recreationally for boating, fishing, camping, and water sports. Lake Jordan is just north of the City of Wetumpka and has two Alabama Power Company dams, Jordan and Bouldin Dams, completed in 1928-1932.



Thurlow Dam

Yates Lake (2,000 acres) and **Thurlow Reservoir** (574 acres), also known as Lake Tallassee, are located downstream from Lake Martin in Elmore County. These are small lakes formed by the Yates and Thurlow Dams, with Thurlow Dam lying adjacent to downtown Tallassee. These lakes are small impounded sections of the Tallapoosa River, without the sloughs that Martin and Jordan have. Alabama Power Company built Yates Dam in 1928, and Thurlow Dam began operation in 1930.

Montgomery County does not have a lake of significant size, but features the **Alabama River** and **Catoma Creek**, a sizeable creek just south of the Alabama River. Much of the City of Montgomery's north side borders the river. The City has a riverwalk and amphitheater on the banks of the river downtown. The county has 6,000 acres of water area in stocked fish ponds and other ponds suitable for livestock and crop irrigation.

The river system of the Region consists of the Alabama River, Coosa River, and Tallapoosa River. The Coosa River in Elmore County has the most whitewater rapids of the three rivers, and attracts thousands of whitewater kayakers to its fast-flowing waters. The Alabama River forms the northern border of Montgomery County and flows adjacent to downtown Montgomery. The Tallapoosa River flows just east of downtown Tallassee. All three rivers are used for recreational purposes such as boating, fishing, and water sports.

USA Today named the City of Montgomery the #1 Historic City in its 2014 "Best Historic City" ranking.

TOURISM + RECREATION

The region's tourism is best viewed through the lens of its rich history and natural resources of lakes and rivers. Much of our nation's Civil Rights struggle unfolded in Montgomery, and this history has been largely preserved for tourists and students. The Alabama Tourism Department estimates that Alabama's tourism industry equated to \$13.3 billion of spending by 25.8 million visitors in 2016, generating \$836 million in state and local tax revenues. *Montgomery County is the 5th most visited county in Alabama, with 1,725,857 visitors in 2016.*

Recreation also is a driver of tourism and enhances the quality of life for residents in the Central Alabama region. Central Alabama offers many forms of recreation for visitors and residents. Whether it is golfing, boating, kayaking, sailing on Lake Martin, or paddling down Autauga Creek through downtown Prattville, there are numerous outdoor adventures to experience. The City of Montgomery hosts an annual Division-1 college football game and is the home of the AA minor league Montgomery Biscuits baseball team. The team's home field, Riverwalk Stadium, built around a historic train station, provided a much-needed economic catalyst for downtown revitalization when it was constructed in 2004.

Heritage Tourism

The Central Alabama region is full of historic sites that are popular stops for tourists. There are 38 National Historic Landmarks (NHL) in Alabama, and five of these are in the region. Four of these are in the City of Montgomery, and one NHL site is in Elmore County. These five sites comprise 13% of the state's NHL sites.

The City of Montgomery was recently recognized as the best history city in the country by *USA Today*. From Civil Rights to Civil War history, there is something for every history enthusiast in the city.

Civil Rights Tourism

The City of Montgomery is home to numerous Civil Rights sites that draw thousands of tourists annually. From the Freedom Rides Museum at the Montgomery Greyhound Bus Station to the Dexter Parsonage Museum, Montgomery offers tourists ample opportunities to explore our country's civil rights history.

Perhaps the most popular civil rights site is the **Dexter Avenue King Memorial Baptist Church** in downtown Montgomery. Designated a National Historic Landmark in 1974, this church served as the focal point for the Montgomery Bus Boycott. Dr. Martin Luther King preached here during his time in Montgomery, and is the only church where he served as a senior pastor. Visitors to the **Dexter Parsonage Museum** can learn how Dr. King and his family lived from 1954 – 1960. Much of the home's furnishings featured in the museum were used by Dr. King's family during their stay here. The museum is located just a few blocks from the King Memorial Baptist Church.



Dexter Ave. Baptist Church

The **Rosa Parks Museum** is a public history museum focusing on the Montgomery Bus Boycott, while also serving as an active memorial to the life of Civil Rights pioneer Rosa Parks. Troy University operates the museum which includes permanent exhibits, a time machine, significant civil rights archives, classrooms, and an auditorium for educational events.

Other significant civil rights sites in Montgomery include:

- **City of Saint Jude**, final campsite of the Selma-to-Montgomery March
- **First Baptist Church** (Ripley Street)
- **Civil Rights Memorial and Center**
- **National Center for the Study of Civil Rights & African American Culture** at Alabama State University
- **Montgomery Interpretive Center** at Alabama State University, part of the Selma-to-Montgomery National Historic Trail (opening 2018)
- **Freedom Rides Museum** at the historic Greyhound Bus Station



National Center for SCR

Other Heritage Tourism

Fort Toulouse – Fort Jackson historic park in Wetumpka attracts 56,230 visitors annually, and is designated by the National Park Service as a National Historic Landmark. This site was the home for the French Fort Toulouse, and Fort Jackson, named for President Andrew Jackson. The park offers visitors walking trails where they can explore scenic views of the Coosa and Tallapoosa Rivers.

The **Alabama State Capitol** in Montgomery draws 152,847 annually and host many events both inside the Capitol and on the grounds. The State Capitol is generally a must-see for tourists visiting Montgomery, with guided tours available for groups.

The **Museum of Alabama**, inside the Alabama Department of Archives and History in Montgomery, is the state’s premier Alabama History museum. This museum attracts 49,000 visitors a year and hosts hundreds of field trips from schools across the state.

ARTS + CULTURE

The Region also has many cultural venues that bring in tourists. Attracting more than 300,000 visitors a year, the **Alabama Shakespeare Festival** is a performing arts venue located in Montgomery’s 250-acre Blount Cultural Park. It offers year-round plays, musicals, and concerts. Blount Cultural Park is also the home to the **Montgomery Museum of Fine Arts**, owned and operated by the City of Montgomery. The Park is the cultural center of the three-county Region due to being the home of these two arts venues. It is also a recreational asset for the region, with miles of walking trails, picnic pavilions, and a dog park.

The **Montgomery Zoo and Mann Museum** draws almost a quarter million visitors annually, and is a unique asset for a City of Montgomery’s size. The City of Montgomery owns and operates the 42-acre zoo, one of only three zoos in the state. The zoo generates significant sales tax revenue for the city through its gift shop and food purchases. It is also used as a recruitment tool for the city, as it is a significant cultural and educational attraction that contributes to the quality of life in the region.

In 2016, 242,166 people visited the Montgomery Zoo to see over 500 animals from five different continents.

Millbrook in Elmore County is home to the scenic **Alabama Nature Center**, an outdoor recreation and destination center on 350 acres just two miles from Millbrook's City Hall. The Center includes the 23,000 square foot NaturePlex, which has a hands-on museum, theater, and a classroom. Visitors can see live animal programming, explore the gardens, or take a hike led by a center naturalist. The nonprofit Alabama Wildlife Federation owns and operates the center, which welcomes 50,000 students annually for educational field trips.

Jasmine Hill Gardens and Museum in Wetumpka covers 20 acres and features year-round floral blooms mixed with classical outdoor Greek sculpture. This attraction sits atop a high bluff that offers visitors scenic views. The gardens are operated by a nonprofit and are considered "Alabama's Little Corner of Greece." This venue is a popular site for weddings, receptions, and other private parties. It also hosts school groups for educational field trips.

To spur tourism and interest in its downtown, Main Street Wetumpka recently launched the **Tulotoma Snail Trail**, a cultivated place project named for the rare snail species indigenous to the Coosa River. The City of Wetumpka is partnering with Main Street to create the trail and the Elmore County Museum is the first stop on the trail. Future stops will connect through downtown and provide a unique insight for residents and tourists alike. Each stop will contain an artistic element created by local artists.

Montgomery and Elmore Counties both have casinos operated by the Porch Band of Creek Indians. Wind Creek Casino and Hotel in Montgomery County is a full service casino featuring live music nightly and a resort-style hotel that sits just near the Montgomery-Elmore County line. A larger Wind Creek Hotel and Casino in Wetumpka features a high-rise hotel overlooking the Coosa River, with multiple restaurants and gaming venues. These Vegas-style casinos attract many tourists from outside of the Region and the state and generate significant tax revenue for the region.

Recreational Tourism + Sports

The Region's two large lakes, **Lake Martin** and **Lake Jordan**, provide a large outdoor playground for residents and tourists alike. These lakes are both located in Elmore County and provide a tourism boost for the county.

Lake Martin, perhaps the state's most travelled lake, has 201 miles of its shoreline are in Elmore County. Lake Martin draws many visitors from outside of the state as they are drawn to the lake's size, clean water, fishing, and campgrounds. Water sports such as skiing, wakeboarding, and jet-skiing are popular during the summer vacation season when the water levels are highest. This recreation impacts the local economy by supporting large scale marinas, restaurants, boat rental companies, fishing guides, hotels/condos, gas stations, and grocery stores. The lake also is big enough to support large sailboats, so there are a few sailing and yacht clubs. Lake Martin has the largest economic impact in the Region of the area's lakes.



Autauga Creek Canoe Trail

Also in Elmore County is **Lake Jordan**, just north of Wetumpka. It is smaller than Lake Martin but offers all the same recreational activities of boating, fishing, camping, and water sports. On a much smaller scale, Yates Lake and Thurlow Reservoir both add to the recreational assets in Elmore County.

The **Coosa River** in Elmore County also is a significant recreational asset. The Coosa offers paddlers challenging whitewater rapids not found anywhere else in central Alabama. The river hosts a few professional whitewater kayaking competitions annually, as well as attracting novice paddlers from across the state. The popularity of whitewater kayaking on the Coosa generates local sales tax revenues from outfitters, convenience stores, and restaurants.

Autauga Creek Canoe Trail in Prattville is a recreational draw and brings paddlers into downtown Prattville as the creek runs right through the heart of the downtown historic district. This is a well-marked trail that features a map of take-ins and take-outs for boaters.

Elmore County's most visited tourist attraction is Prattville's **Capitol Hill Golf Course on the Robert Trent Jones Golf Trail**. This site features three 18-hole courses and has hosted a professional LPGA golf tournament. Every year golfers from across the country play 80,000 rounds of golf at this facility, making it the most popular course on Alabama's Robert Trent Jones Golf Trail. This golf facility has a significant impact on sales and lodging tax revenue not just in Prattville, but the entire Region.

Sports are also a tourism driver in the region. Every year baseball fans flock to downtown Montgomery to see the AA minor league **Montgomery Biscuits** baseball team play. Biscuits baseball brought in **230,742 fans** in the 2016 season. Since 2014, the City of Montgomery has hosted an annual college football bowl game, the **Camellia Bowl**, which has a significant economic impact for the region. The game is held in Cramton Bowl, a city-owned facility, and Raycom Media is the event's corporate sponsor. Other notable Montgomery events:

- **BassMaster** professional fishing tournaments
- **NAIA Men's Soccer** National Championship Tournament
- **NCAA Blue Gray National Tennis Classis** – annual men and women's Division 1 tennis tournament featuring 16 teams, held at the City of Montgomery's tennis parks

- **Alabama State University** collegiate sporting events
- **Auburn University Montgomery** collegiate sporting events





Emory Folmar Complex

Local Recreational Events + Assets

The City of Montgomery hosts many high school sports championships, including baseball, softball, and tennis. The City is the site of the annual USTA state junior tennis tournament, held at the City's two main tennis facilities. The City has also hosted the Alabama High School All-Star Week, which includes 350 athletes representing six sports in a week-long completion. These events bring families from across the state to Montgomery for periods of a few days to a week. Amateur sporting events generate sales and lodging tax revenue for the City and the entire Region. The region offers sizeable recreational assets, including:

- **Multiplex at Cramton Bowl:** multi-use 70,000 SF indoor facility operated by City of Montgomery that has space for 15 volleyball courts, gymnastics, 6 tennis courts, indoor track, and 2 soccer fields
- **Emory Folmar YMCA Soccer Complex:** seating capacity of 4,000, 10 lighted fields, indoor practice field
- **Lagoon Park Golf Course:** the region's premier municipal golf course, operated by City of Montgomery
- **Wetumpka Sports Complex:** large baseball facility with 10 lighted fields, 10 batting cages, 2 soccer fields
- **Swayback Bridge Trail:** Mountain biking and hiking trails north of Wetumpka bordering Lake Jordan, maintained by a local trail association. Site of the annual Coosa River Challenge race, which brings in hundreds of adventure racers from all across the state.
- **David Whetstone Jr. Sports Complex, Prattville:** 7 baseball fields, youth tournaments
- **Mill Creek Sports Complex, Millbrook:** 6 baseball fields, 2 batting cages, youth tournaments

CENTRAL ALABAMA REGIONAL TOURISM THREE-YEAR SNAPSHOT

TRAVEL-RELATED EMPLOYMENT

County	2014	2015	2016	2015 - 16 Growth Rate
Autauga	438	403	472	17.4%
Elmore	1,897	2,093	2,158	3.1%
Montgomery	11,268	11,981	12,157	1.5%

TRAVEL-RELATED EARNINGS

County	2014	2015	2016	2015 - 16 Growth Rate
Autauga	\$11,632,572	\$11,162,945	\$15,233,796	36.5%
Elmore	\$46,148,195	\$51,134,119	\$53,051,331	3.7%
Montgomery	\$288,466,248	\$308,821,805	\$317,611,642	2.8%

TRAVEL-RELATED EXPENDITURES

County	2014	2015	2016	2015 - 16 Growth Rate
Autauga	\$33,761,173	\$30,334,502	\$41,686,022	37.4%
Elmore	\$129,718,145	\$141,391,696	\$150,081,448	6.1%
Montgomery	\$723,426,438	\$777,836,573	\$814,669,396	4.7%

LODGING TAX REVENUE

County	2014	2015	2016	2015 - 16 Growth Rate
Autauga	\$163,444	\$146,855	\$201,809	37.4%
Elmore	\$652,141	\$710,829	\$754,515	6.1%
Montgomery	\$3,281,158	\$3,527,940	\$3,694,998	4.7%



CENTRAL ALABAMA

SECTION V | INFRASTRUCTURE

2017 CEDS

SECTION V | INFRASTRUCTURE : TRANSPORTATION + UTILITIES

TRANSPORTATION

Roadways + Rail

The region is served by two interstates, I-65 and I-85. I-65 provides access to Birmingham and Huntsville to the north, and Mobile to the south. I-85 provides access to the north and east to Auburn and Atlanta, but does not travel further south or west of Montgomery, as it ends at the intersection of I-65 just south of downtown Montgomery. **U.S. Highways 331, 231, 31, 82, and 80** are the five major US Highways in the region. Major State Highways include 14, 110, 229, and 143. There are two private toll roads, both connecting Montgomery County to Elmore County in the northern and northeastern portions of Montgomery County.

Alabama River is the home for **the Port of Montgomery**, a small port located just north of downtown Montgomery. This navigable river converges with the Tombigbee River just north of Mobile Bay.

CSX and **Norfolk Southern** provide service throughout the region, providing ample rail infrastructure for existing and future industry.

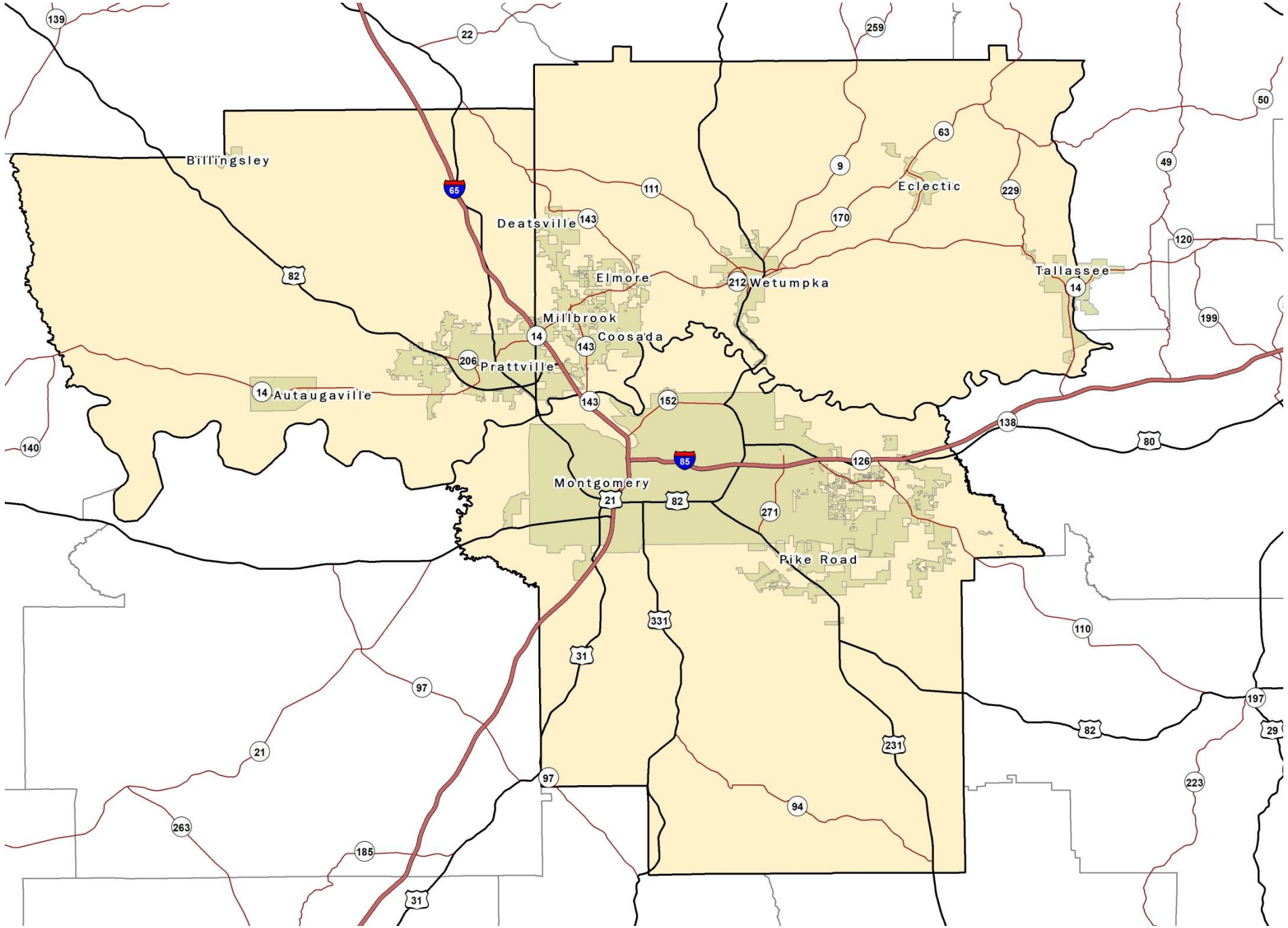
Airports

Montgomery Regional Airport is located just six miles southwest of Montgomery's downtown. The airport serves 16 counties in Central Alabama, with **369,744** travelers using the airport in FY 2016. The Montgomery Airport Authority estimates the airport has a **\$1.32 billion economic impact**. The airport had a total of 186,542 departures and 183,202 arrivals in FY 2016.

American Airlines and Delta Airlines provide daily nonstop flights from Montgomery to Atlanta, Charlotte, and Dallas. Beginning in 2018, the airport will offer nonstop flights to Reagan National Airport in Washington D.C. The airport is also an asset for large companies like Hyundai that have a need for international flights connecting out of Atlanta. The Hyundai manufacturing facility is located just a few miles south of the airport. The airport's parking area was recently upgraded, as well as other minor improvements to the terminal.

Prattville, Wetumpka, and Tallassee have municipal airports serving individuals and corporate clients. These small airports are a recruiting tool for economic development, as many prospective companies want to fly directly into the city that they are considering for an expansion.

CENTRAL ALABAMA REGIONAL ROAD NETWORK



UTILITIES

Electricity	Alabama Power Company provides electricity for the majority of the region's residents.
Electric Co-ops	Dixie Electric and Central Alabama Electric provide electricity in areas not served by Alabama Power.
Natural Gas	Spire and Southeast Gas provide natural gas for most of the region.
Internet/Cable Phone + TV	Charter, Wow, and AT&T provide internet, phone, and cable television service. Broadband internet is not available in some of the rural areas of the region. However, this has improved in recent years.

WATER + SEWER SERVICE

Autauga County: There are 6 water systems total, covering 3 municipalities and unincorporated areas. The Town of Billingsley's Water System extends well outside their town limits into Chilton County.

Elmore County: There are 10 water systems total, covering 7 municipalities and unincorporated areas.

Montgomery County: The municipalities of Montgomery and Pike Road and some unincorporated portions of east Montgomery County are served by the Montgomery Water Works and Sewer Board. Outside of the Montgomery Water Works service area there are 8 community water systems.

IT INFRASTRUCTURE

The **Montgomery Internet Exchange (MGMix)** is a cooperative alliance established in 2016. This high-speed data exchange is the first of its kind in Alabama, and just the fourth internet exchange in the Southeast. The City of Montgomery partnered with Montgomery County Commission, the State of Alabama, Maxwell-Gunter Air Force Base, and Cyber College of the Air Force to launch MGMix. It is located in downtown Montgomery's RSA Data Center and is connected to 18 companies, including global technology giants **Verisign**, **Akamai Technologies**, and **Hurricane Electric**. Auburn University Montgomery joined MGMix June 2017. The Air Force's Air University is also connected to MGMix. The exchange recently upgraded to **100-gigabyte capacity** which could help attract major technology companies to the region, as well as benefiting existing companies.



CENTRAL ALABAMA

SECTION VI | SWOT ANALYSIS

2017 CEDS



- Location of Region
- Transportation Network
- Rivers + Lakes
- Water Quality + Supply
- Education Resources
- Recreation + Tourism
- Available Land
- Military Base
- Diversity in Area
- Robert Trent Jones Golf Trail
- RSA Investment
- Strong Existing Industry
- Reliable Energy Supply
- Historic Assets
- Strong Workforce
- Low Cost of Living
- Low Cost of Doing Business
- Medical Care
- Prison System
- State Government



- Under-Employment
- Participation in Vocational Training
- Public Education
- Social Media [Presence]
- Highway 14 (Needs to be widened)
- Not Pro-active in Long-Range Planning
- I-65 Corridor
- I-85 Corridor in Montgomery
- Highway 82 + Troy Highway (Hwy 231)
- Drug Screening Failure
- Lack of Work Ethic
- Lack of Public Transportation
- Level of Underserved Population



- [Enhance] I-65 Corridor + I-85
- Tourism
- River Systems
- Improvements to Alternative Transportation System
- Better Use of Educational Resources
- Improve Education
- Development + Implementation of Comprehensive Plans
- [Establish] Partnerships
- Develop International Relationships
- Support the State's Efforts with Black Belt Communities
- Marketing of Region
- Base Closure Issues - Redevelopment (Planning)



- Unplanned Growth + Closures
- Decrease in Industrial Diversity
- Flight of Industry
- Stresses on Public Safety Providers
- Loss of Quality of Life - Planning/Funding
- [Inability] to Meet Needs of Aging Population
- Lack of Sanitary Sewer and Water in Some Areas

SWOT

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

SECTION VI | SWOT ANALYSIS

Strengths

Location

- Centrally located with interstates located nearby & logistically close to mobile port
- Proximity to state government

Transportation Network

- CSX Rail hub
- Interstates
- Airport and planned future expansions
 - Current has two 8000+ foot runways
 - Plan for an additional runway to accommodate Air National Guard F35s – announcement expected in September 2017

Rivers + Lakes

- Asset for tourism and quality of life
- Good Water Quality/Clean
- Power/Energy Generation

Water Quality + Supply

- Plenty of supply and established water treatment centers
- Water quality continues to improve through local efforts to improve run-off handling resulting in cleaner rivers and streams
- MS-4 permitting standards also are working to improve water quality
- Improvement in public education regarding water quality and supply

Education Resources

- Full-range of educational opportunity
- Public & Private Institutions and Quality City/County School systems
- Workforce development programs in high schools
- Career Tech opportunities in Community Colleges and High School
- Entrepreneurship centers/Ag. Centers
- New Vocational-Technical Center in Montgomery (old Montgomery Mall)
- Montgomery Regional Workforce Training Center
- Partnerships for dual enrollment between City of Montgomery/Montgomery County/ AIDT “Montgomery County Technical Network”
- Restructuring of Head Start
- Pre-K Early Childhood Education Charter Programs
- Higher Quality Measurement Standard due to failure of ACT Inspire Program

Strengths

Recreation + Tourism

- Rivers/Lakes: watersports, kayaking, fishing, etc.
- RTJ Golf
- Alabama Wildlife Federation
- Cultural/historical tourism
- Minor League
- Casino
- Lanark
- Wetumpka: Impact Crater, Telatoma Snail Trail
- Alabama Birding Trail
- Sports Tourism: Central Alabama Sports Commission
- Agri-Tourism

Available Land

- Plenty of developable land (green and brown sites)
- Affordable land
- Access to infrastructure

Military Base

- Billions in economic impact
- Foreign citizens
- Exposure
- Officer training school
- Brain-center for Air Force
- Huge data-center – conduit for recruitment of higher level professionals
- Prestige for area
- Joint Land Use Study – City of Montgomery/Maxwell
- DOD Data Center

Diversity in Area

- River-Region is accepting to other cultures
- Global perspective
- Open for business
- Increase in foreign held industry

Robert Trent Jones Golf Trail

- LPGA and other tournaments
- Local economic impacts
- Youth/College Tournaments
- 90 thousand rounds of golf played per year

RSA Investment

- Incentivizes companies to move here
- Recruiting sponsorships for region
- Existing relationships with industries
- Real estate investments
- RSA one of the best funded retirements systems in the country

Strong Existing Industry

- Key national and internal industry, which also helps recruit new industry
- Workforce
- Internet Exchange:
 - The only one in Alabama and one of only four in the US
 - Key to attracting big business
- Hyundai and suppliers
- Small Business Groups – in both metro and outlying areas
- GKN
- Hospital System

Strengths

Reliable Energy Supply

- Lack of downtime helps production for industry
- Helps in recruitment
- Affordable

Historic Assets

- Wright brothers/Aerospace Industry
- Asset for film industry
- Civil Rights Trail & Heritage Museum
- Fort Toulouse
- Tuskegee Airmen's Museum
- City of St. Jude
- Confederate Trail
- State Archives
- Community Walking Tours

Strong Workforce

- Sector specific (healthcare, IT)

Expansion of Medical and Education

Low Cost of Living

- Affordable real-estate
- Low taxes

Low Cost of Doing Business

- Dollar will go farther
- Start-up cost
- Affects companies bottom line

Medical Care

- Baptist was ranked Top 15
- Hospital in each regional county
- Jackson Hospital Heart & Robotics
- UAB Hospital Medical School Campus

Prison System

- Employment opportunity

- Community College Provides Job Training at the prisons to exiting inmates

State Government

- Strong Employer
- Access to State Leadership

Weaknesses

Under-employment

- Strain on social services
- Leads to criminal lifestyle
- Less money in economy

Participation in Vocational Training

- Not enough promotion and perception issue towards vocational training
- Lack of individuals access, funding and transportation to take advantage of training
- Lack of capacity to accept the participants wishing to enter programs

Public Education

- Poor performance of school systems
- Perception of public education
- Funding of education system
- State takeover of Montgomery Schools
- Temporary shutdown of Head Start Program
- K-12

Social Media

- Lack of use to promote communities assets: Historic, Tourism, Career Opportunities, Industrial development, Etc.
- Job Training Opportunities
- Government Access

Weaknesses

Access to Medical Care

- Shortage of Specialist
- Limited number of trauma centers
- Physician retention
- Prevalence of prominent diseases (heart disease/diabetes)
- Shortage of nurses and need for more certified nursing assistants
- Shortage of nurse practitioners
- Lack of mental health resources – especially in rural areas

Highway 14 (needs to be widened)

- Bridge improvements (Elmore and Tallassee)
- Alignment issues in Prattville
- Need for traffic signalization and street lighting on both 14 and Cobbs Ford Road
- Need to resolve drainage issues and provide for improvements to infrastructure

Not Pro-active in Long-range Planning

- Implementation
- Lack of executive support for funding elements of the plan
- Lack of continuity between administrations
- Lack of willingness to enforce regulations
- No formal meeting structure for cross-jurisdictional planning
- Need to education local leaders on Comprehensive Planning

I-65 Corridor

- Lack of access & interchanges that can handle industrial traffic
- I-65/I-85 interchange needs renovation and safety improvements

I-85 Corridor in Montgomery

- Needs widening between Montgomery and Atlanta
- Funding for improvements is an issue
- Need for improved truck routes to take some traffic off I-85

Highway 82 + Troy Highway (231)

- Need for widening and/or shoulder improvements
- Need for enforcement of speed limits, particularly for truck traffic
- Need for installation of traffic signals and street lighting

Drug Screening Failure

- Workers have problem passing drug tests. Thus, diluting workforce.
- Loss of training cost when employee cannot pass drug screening.
- Business and Industry are expressing concern to local leaders regarding their inability to recruit qualified workers locally

Lack of Work Ethic

- Technology and entitlements
- Human Resources organizations need to shift its thought process with regard to work ethic and how younger works view productivity

Weaknesses

Lack of Public transportation

- Need for alternative transportation in rural areas
- Pollution
- Lack of accessibility to public transportation
- Need for integration of public transit with automobile traffic
- Need to expand scheduling of public transit routes to include third shift and late night workforce

Level of Underserved Population

- Lack of public transportation to rural areas impacts opportunities for:
 - Proper education for children and parents
 - Access to quality Healthcare
 - Access to healthy/local foods

Opportunities

I-65 Corridor + I-85

- Access to the Port of Mobile
- Aerospace and Automotive Access
- Extension of I-85 to MS to promote tourism and product delivery
- Passenger Rail feasibility study underway may offer solutions to transportation improvement needs
- Improve industrial park access

Tourism

- Continued capitalization of cultural, historical, and natural history assets
- Revitalization
- Recreation
- Consider entertainment industry as economic development
- Improvements to marketing of entertainment and tourism activities such as that of regions aquatic resources and activities
- Develop wayfinding plan to allow ease of access to region's tourism resources

River Systems

- Waterway tourism

Improvements to Alternative Transportation System

- Multi-use trails, bike lanes, sidewalks, share the road programs
- Establish more Park and Ride Programs/facilities
- Improve perception of alternative modes of transportation
- Look into opportunities for ride-sharing and how that helps to enhance the public transportation system

Better Use of Educational Resources

- Workforce development
- Public awareness program of resources
- Increasing opportunities for Pre-K Programs

Opportunities

Improve Education

- Use H.S. education as an opportunity to make graduates workforce ready
- Improve Vocational Education
- Co-ops and opportunities for Virtual Learning
- 2-Year College (Dual enrollment)
- Life skills
- Focus on rural communities and their access to various forms of education
- Engagement of technical workforce instructors

Development & Implementation of Comprehensive Plans

- Provide training on how communities can implement their plan

Partnerships

- Better use of public-private partnerships
- Better use of joint public partnerships
- Cross City/County Interactions

Develop International Relationships

- Capital investment and jobs
- More than industrial development
- Development of sister-city programs
- Education
- High School Exchange
- Foreign Officers School

Support the State's Efforts with Black Belt Counties

- Black belt commission
- I-85 Improvements

Marketing of Region

- Joint Marketing for economic and tourism for entire region
 - Improve social media presence
 - Improve visibility of communities along interstate highways
 - Increase awareness of regional airports and their services
- Airport – improved customer service and expansion of destinations. Availability of land around the airport.
- Improve signage along interstate system for what municipalities are off each exit and distance signs to Montgomery.
- Regional way-finding system for tourism

Base Closure Issues – Redevelopment (Planning)

- Gain additional military programs from other closed bases.
- Increased State involvement – National Guard

Threats

Unplanned Growth + Closures

- Stresses on Infrastructure and other services
- Loss of Jobs & Revenue
- Blighting from abandoned buildings
- Sprawl: uncontrolled growth; unadvisable utility extensions into unincorporated areas

Decrease in Industrial Diversity

- Guard against becoming dependent on only one or two types of industrial development
- Recruitment of “Mega” projects threatens availability of developable industrial lands

Threats

Flight of Industry

- Need for more Research & Development companies
- Weakened industry programs and relationships
- Need for more funding and retention programs to support small business and industries
- Loss of education dollars
- Loss of population/workforce
- Loss of general fund revenue

Stresses on Public Safety Providers

- Need for additional resources to support public safety in rural areas: sheriff's department, volunteer fire, etc.
- Loss of trained volunteer firefighters due to job constrains and relocations
- Revenue streams

Loss of Quality of Life – Planning/Funding

- Need to use long range planning measures to protect against loss of identity, historic character, etc. as communities grow
- Loss of quality of life amenities leads to increases in crime

Ability to Meet Needs of Aging Population

- Transitioning of resources to provide needed services
- Lack of access to Healthcare
- Lack of access to Transportation
- Need for appropriate Senior Programs

- Housing & Housing Styles/Sizes: Handicap accessible single family, senior living neighborhoods, etc.

Ability to Meet Needs of Aging Population

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- Housing & Housing Styles/Sizes: Handicap accessible single family, senior living neighborhoods, etc.

Lack of Sanitary Sewer and Water in Some Areas

- Need for on-going plans for maintenance of infrastructure
- Capacities over/under create strain on local government finances
- Lack of sanitary sewer and deteriorated infrastructure causes ADEM violations and threats to pollution of our natural resources



CENTRAL ALABAMA

SECTION VII | DEVELOPMENT STRATEGIES

2017 CEDS

SECTION VI | DEVELOPMENT STRATEGIES



AL Rural Action Commission Meeting

Vision Statement

*“The Central Alabama region will be a cooperative and unified region offering facilities, services and opportunities that can maintain a stable and prosperous population through a diverse economy while becoming a **destination for visitors.**”*

GOALS + STRATEGIES

The recommended goals and strategies for regional economic development in the Central Alabama region include:

GOAL I

Create a cooperative system of regional economic development with strong regional markets.

STRATEGIES:

- Promote I-65 and I-85 corridors as prime transportation corridors and locations for industrial recruitment and development.
- Seek out sources of funding for recruitment and retention of business and industry.
- Support the planning and development of new industrial and commercial parks and sites in the Region.
- Train public officials on the economic development process to help them attain better marketing skills.
 - Establish an Economic Development Training Program – see Auburn University & EDAA
- Increase marketing of the region as a destination for businesses, visitors, and new residents.
- Market Region as an information technology hub to include fiber optics, broadband, GIS, etc.

GOAL II

Coordinate a seamless education and training system that meets the needs of business and industry.

STRATEGIES:

- Increase the region's participation in, and support of, a workforce development strategy.
- Seek out sources of funding for recruitment and retention of business and industry.
- Continuously improve educational facilities and programs for pre-K-12, higher education, and workforce development.
- Forge partnerships between schools and regional businesses through apprenticeships, mentoring programs and other programs.
- Provide parents with materials and learning opportunities on the value of early childhood education and keeping their children in school.

GOAL III

Provide cost-effective multi-modal transportation and public infrastructure systems in an effort to promote quality economic development for the region.

STRATEGIES:

- Develop and maintain a regional transportation plan that identifies and prioritizes transportation needs.
- Encourage development of job and healthcare access transportation.
- Enhance recreation and tourism through the continued development and expansion of regional trail systems, to include blue-ways and greenways, as well as other forms of recreational trails.
- Develop regional broadband communication plans.
- Develop a regional water & sewer study to identify water supply needs and capacities.
 - Work with local providers to develop long range water service plans which include planning for additional water production facilities, enhancing water storage capacity and planning for future water capacity needs.
 - Work with local providers on long term maintenance plans for existing sanitary sewer facilities, and develop plans to determine future sewer needs and capacities.

GOAL IV

Develop strong local and regional leadership skills.

STRATEGIES:

- Encourage collaboration and cooperation among local and regional leaders.
- Sponsor leadership training programs to support capacity building among leaders.
- Encourage leaders to exert the political will needed to implement plans and achieve long term progress through mutual collaboration.



GOAL V

Expand the availability and promotion of healthy food.

STRATEGIES:

- Develop and equip healthy food retail and wholesale markets within the Central Alabama region.
- Stimulate demand for and reducing critical barriers to food access.
- Cut food waste by preventing food waster losses through the donation of unused food to feed hungry people
- Supporting market development opportunities for composting and animal feed.
- Encourage local governments to preserve active farmland through their regulatory processes.
- Work with regional organizations in the development of local healthy food policies.

RESOLUTION

WHEREAS, the Central Alabama Regional Planning & Development Commission (CARPDC), was formed with the objective of promoting economic development and coordination in the Central Alabama District; and

WHEREAS, as a designate Economic Development District (EDD) by the Economic Development Administration (EDA), the Central Alabama Region is provided annual funding from EDA to perform economic development planning tasks; and

WHEREAS, the Comprehensive Economic Development Strategy (CEDS) is one of the tasks required by the EDA to be prepared every five (5) years with annual updates; and

WHEREAS, the CARPDC has prepared the 2017 five-year CEDS for Region 9;

NOW, THEREFORE, BE IT RESOLVED, by the Board of Directors of the Central Alabama Regional Planning & Development Commission, that the 2017 CEDS is hereby APPROVED this the 8th day of February, 2018.



Margaret White, Secretary

ATTEST:



Greg Clark, Executive Director

