Coastal Regional Commission of Georgia
Economic Development District

Comprehensive Economic Development Strategy (CEDS)

Prepared for: U.S. Department of Commerce
Economic Development Administration

Prepared By: CEDS Strategy Committee
Coastal Regional Commission of Georgia

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Thank you one, and all, for your help in drafting this critically important document.

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Executive Summary

This Comprehensive Economic Development Strategy (CEDS) brings together the public and private sectors to create an economic roadmap to strengthen the coastal Georgia regional economy. This CEDS analyzes the coastal Georgia regional economy and serves as a guide for:

- Establishing regional goals and objectives;
- Developing and implementing a regional plan of action; and
- Identifying investment priorities and funding sources.

Additionally, the aim of the CEDS is to serve as a tool to integrate coastal Georgia's human and physical capital with economic development planning and goals. Integrated economic development planning provides flexibility to adapt to global economic conditions and fully utilize coastal Georgia's unique advantages to maximize economic opportunity.

Section 1, *Background—Coastal Georgia Regional Economy*, presents a factual and inclusive picture of the current economic development conditions in the region with a discussion of the economy; population; geography; workforce development; transportation access; resources; environment; and other pertinent information. The analysis also contains strategic findings that identify problems, issues, and opportunities posed by external and internal forces affecting coastal Georgia's regional economy. The analysis considers and identifies past, present, and projected future economic development investments in the region.

The Coastal Regional Commission (CRC) conducted a survey and interviews with economic development professionals, the CEDS Economic Development Committee, and elected officials to gain a broad cross section of perspectives from the coastal Georgia region. Surveys were provided online as well as sent to public and private economic development professionals.

Section 2, *Analysis of Economic Development Problems, Issues, and Opportunities*, looks to identify challenges and opportunities present in the coastal Georgia region. The rate of growth, both present and anticipated, presents important challenges to the region. One of these challenges is the growing service sector that is providing a number of lower wage jobs. Also, there are a number of important opportunities including the vibrant ports and associated logistics, distribution, and warehousing industries.

Workforce investment strategies are a critical aspect of preparing the coastal region for present and future employment opportunities. Employment in some areas of the coast is limited by the number of available skilled workers. The local workforce investment board, Coastal Workforce Services, has an updated strategic plan. Excerpts of the recommendations from this strategic plan are included in this section.

This section also identifies and analyzes the economic clusters within the coastal Georgia region.

Section 3, *Goals and Objectives—Defining Regional Expectations*, sets forth goals and objectives to address the economic problems of the region. All strategic projects, programs,

and activities identified in the CEDS Plan of Action (Section 6) work to fulfill the goals and objectives identified in this section. The goals represent broad, primary regional expectations.

One key goal of the CEDS is to provide guidance to the coastal Georgia region to attain sustainable, quality growth and create a diverse economic region. A second key goal is to support the guiding principles from the Regional Plan of Coastal Georgia that are to guide the 10 coastal counties to share in jobs and investment that are created through the integrated balance of sustainable economic development initiatives. This plan contains an Economic Development element and was created through significant public and private input. Information from this plan is included in this document.

Section 4, Community and Private Sector Participation, discusses community and private sector participation in the development and implementation of the activities and projects identified in the CEDS. This section details existing partnerships that support economic development in the region.

Section 5, *Strategic Projects, Programs, and Activities*, identifies regional projects, programs, and activities designed to implement the Goals and Objectives of the CEDS. This section includes projects that were disclosed to the CRC. Due to the nature of economic development projects, public disclosure is not always in the best interest of the community and the project. This section contains two separate lists. The first list is called the Suggested Projects List (SPL). The SPL contains suggested projects, programs, and activities. Each project within the SPL is also assigned a lead organization that is responsible for execution of the project.

The second list is called the Vital Projects List (VPL). The VPL contains a prioritization of vital projects, programs, and activities that addresses the region's greatest needs. A project contained in the VPL could also be identified to enhance the competitiveness of the region.

Section 6, *Plan of Action*, discusses a series of actions that may be undertaken to implement the goals and objectives of the CEDS. These strategies will promote economic development and opportunity; foster effective transportation services; encourage entrepreneurship and business incubation; enhance and protect the environment; maximize effective development of the workforce consistent with State and local workforce investment strategies; promote the use of technology in economic development; balance resources through sound management of physical development; and obtain access to funds through mechanisms such as EB-5 Regional Centers and CDFIs.

This Plan of Action also contains a section that discusses the methodology for integrating the CEDS with the State of Georgia's economic priorities.

Section 7, *Performance Measures*, describes a list of performance measures that may be used in evaluation by the CRC to gauge successful implementation of the CEDS. Some of these key performance measures track the number of jobs created, the number and types of investments that will be undertaken in the region, the number of jobs retained in the region, the amount of private sector investment in the region, the changes in the economic environment of the region, cluster development, and the diversification of the economy. Two additional measures that provide a strong assessment of the direction of an economy are per capita income and bank deposits.

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The performance measures noted in Section 7 may be tracked by the Regional Commission and are potential measures for tracking economic growth and diversity.

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Introduction

The Coastal Georgia Comprehensive Economic Development Strategy (CEDS) is designed to bring together the public and private sectors in the creation of an economic roadmap to diversity and strengthen the regional economy. By implementing this strategy, the region is eligible for economic development assistance investment from the U.S. Department of Commerce, Economic Development Administration (EDA). The region served by the Coastal Regional Commission (CRC) is also an Economic Development District (EDD) designated by EDA. Economic development assistance investments from EDA can help fund local infrastructure projects, technology-led economic development projects, and strategies to respond to sudden and severe economic dislocations (e.g., major lay-offs, plant closures, BRAC).

The Coastal Georgia CEDS is a regional plan and is not intended as a replacement for local plans, but rather as a consolidating document suggesting ways in which localities can accomplish more by working together. Some goals are easier to reach and have greater impact when planned and implemented on a regional basis.

The Coastal Georgia CEDS is strategic, not comprehensive, in nature. Limitations in time and resources create a focus on a few strategic issues rather than create a comprehensive plan addressing all aspects of the region. The CEDS process results in a strategy that has the capacity to respond to conditions and is adaptable to needs.

The Coastal Georgia CEDS will analyze the regional economy and serve as a guide to establishing regional goals and objectives, a regional plan of action, and the investment priorities and funding sources. The CEDS also identifies the lead organizations assigned responsibilities for its execution. As a performance-based strategic plan, this CEDS will serve a critical role in the region's efforts to grow our economic base in the face of accelerated growth, economic dislocations, competition, and other events challenging regional economic vibrancy. This CEDS is the result of a continuing economic development planning process, developed with broad-based and diverse public and private sector participation.

The organization responsible for the development of this CEDS is the Coastal Regional Commission (CRC). As a recipient of Planning Investment funds from EDA, the CRC serves as the planning organization for the Coastal Georgia Economic Development District (EDD), which is comprised of the member governments of the CRC region (ten counties and 35 cities) in Map 1:

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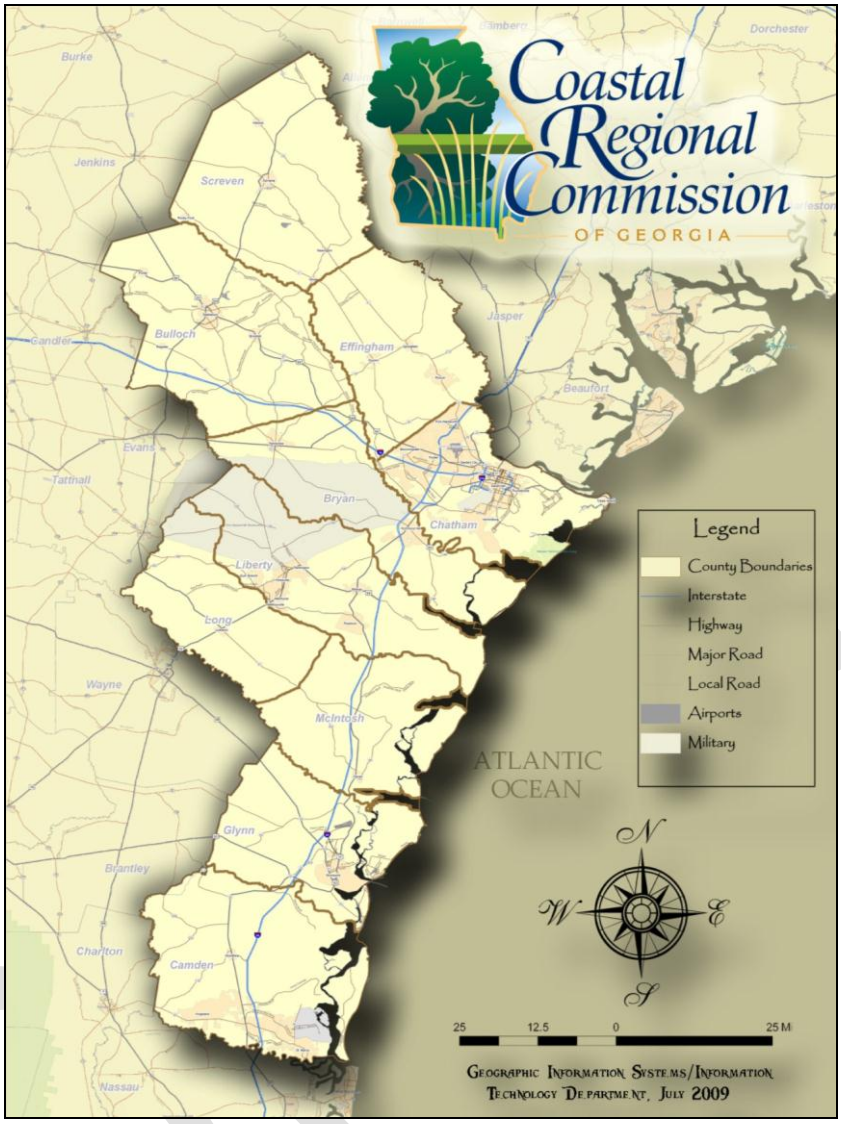
Map 1 Coastal Regional Commission EDD



CEDS Strategy Committee

The CEDS Strategy Committee is responsible for developing, implementing, and revising the Comprehensive Economic Development Strategy with the assistance of CRC staff. The Strategy Committee is also responsible for outlining the methodology for cooperating and integrating the CEDS with the State of Georgia's economic priorities, incorporating relevant material from other government sponsored plans, and ensuring consistency with applicable State and local workforce investment strategies.

The CRC CEDS Strategy Committee represents the main economic interests of the region, and includes private sector representatives as a majority of its membership. The 2012 Coastal Georgia CEDS Strategy Committee has been appointed by the Council of the Coastal Regional Commission and is comprised of representatives from each county, including

representation from minority, higher education, workforce development, public and private sectors as required by EDA regulations.

Table 1: CEDS Economic Development Committee

Member	County	Representation
Linda Barker	Bryan County	Private Sector
Chap Bennett	Effingham County	Private Sector
Chris Blaine	Chatham County	Private Sector
David Boland	Glynn County	Private Sector
Allen Brown	Liberty County	Private Sector/Chamber and Development Authority
Jason Coley	McIntosh County	Private Sector/Chamber and Development Authority
Dan Coty	Glynn County	Private Sector
Walter Gibson	Bulloch County	Public Official
Dorothy Glisson	Screven County	Private Sector- Individual
Russell Keen	Bulloch County	Private Sector/Higher Education
Clarence Knight	Camden County	Minority/Community Leader
William Miller	Long County	Minority/Private Sector/ Workforce Development
Tom Ratcliffe	Liberty County	Private Sector
Sean Register	Bryan County	Private Sector/Development Authority
Craig Root	Camden County	Private Sector

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1 Background—Coastal Georgia Regional Economy

Challenges to the economic prosperity of coastal Georgia are increasing in number. The recovery from the recent recession has been slow, and the region has experienced a lack of funds to fully implement the planning and economic development needs of a region with a high growth rate and critical workforce issues. Planning investments, such as those offered by EDA, are essential for providing the tools needed to assist the Coastal Georgia EDD in realizing its potential. The EDA's investment in economic and infrastructure development activities has been beneficial to both local and State units of government. It has also been important to special purpose units of government (e.g. local development authorities, Georgia Ports Authority) within the Coastal Georgia EDD. Some of these jurisdictions have experienced substantial success in terms of economic growth, capacity to provide services for future growth, expansion opportunities, increased productivity, and operations efficiency. Coastal Georgia must find ways to ensure that the past positive trends in economic development are continued into the future in light of the deepening of the Savannah Port.

One challenge facing the region is that the cost of living is increasing in the area without a corresponding increase in wages. This has led to a lack of affordable housing in the major employment areas in the region, and has contributed to changes in the commuting patterns of much of the regional workforce. Accessibility to the region's abundant natural resources is becoming more and more difficult as the population increases and land use patterns change to accommodate this growth.

In general, the economic conditions of the region include:

- a growing service industry that usually contributes lower paying jobs;
- a high dependency on the tourism industry;
- an economy impacted by national trends;
- a proliferation of logistics, warehousing and distribution industries near ports and interstate highways;
- a workforce that is not meeting growth needs due to retirement and the lack of availability of skilled personnel;
- a transition in the traditional manufacturing industry to utilization of new technologies and practices;
- a rapidly increasing cost of living for the region; and
- a lack of affordable housing in employment centers.

1.1 Economy

The economy of a region is impacted by a number of important issues, including employment opportunities, income, workforce, and demographic characteristics. The Coastal Georgia region has a very bright future due to the appeal of the coastal region for employers, retirees, families, and individuals of all ages. Underlying patterns in the economy are changing rapidly. These issues are discussed in greater detail in the following pages.

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1.1.1 Commuting Patterns

The most recent data available for commuting patterns is derived from the U.S. Census Bureau's 2006-2010 5-year American Community Survey (ACS) estimates[1]. Based on the ACS data, 91.6 percent of the region's workers aged 16 years or older travels to work in a car, truck, or van. This percentage has not declined since the 2000 decennial Census, when 91.7 percent of the region's workers commuted in an automobile. The majority of these individuals travel alone. Less than 4 percent of the region's workers commute by walking, bicycling or utilizing public transportation.

The average time the region's workers spend traveling to employment according to the most recent ACS estimates is 22.1 minutes. 11 percent of the region's workers travel more than 45 minutes to work. Anecdotal evidence today suggests individual commuters experience travel times greater than this data suggests.

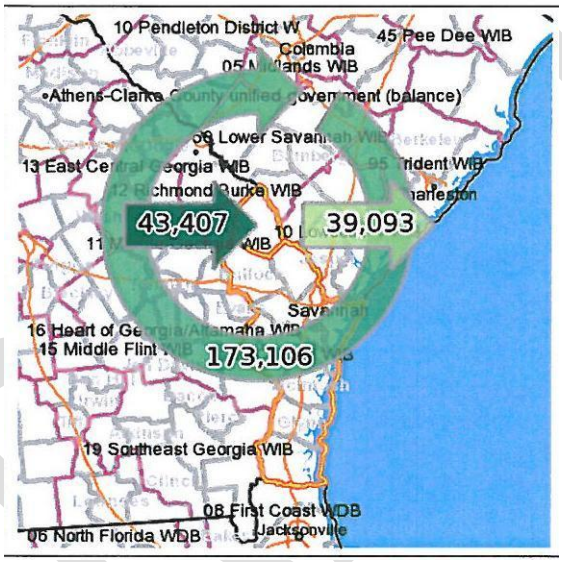


Figure 1: 2009 Inflow/Outflow Job Counts[2]

Figure 1 shows that in 2009, almost as many residents of the region commuted to jobs outside the area (39,093) as employees commuted to jobs within coastal Georgia from other counties and states (43,407). 20% of the primary jobs within the region were held by outside commuters, and 18.4% of employed coastal Georgia residents left the region for employment. 80% of the region's workers are able to maintain employment within the region, which is a relatively high percentage compared to workforce investment areas around the state.

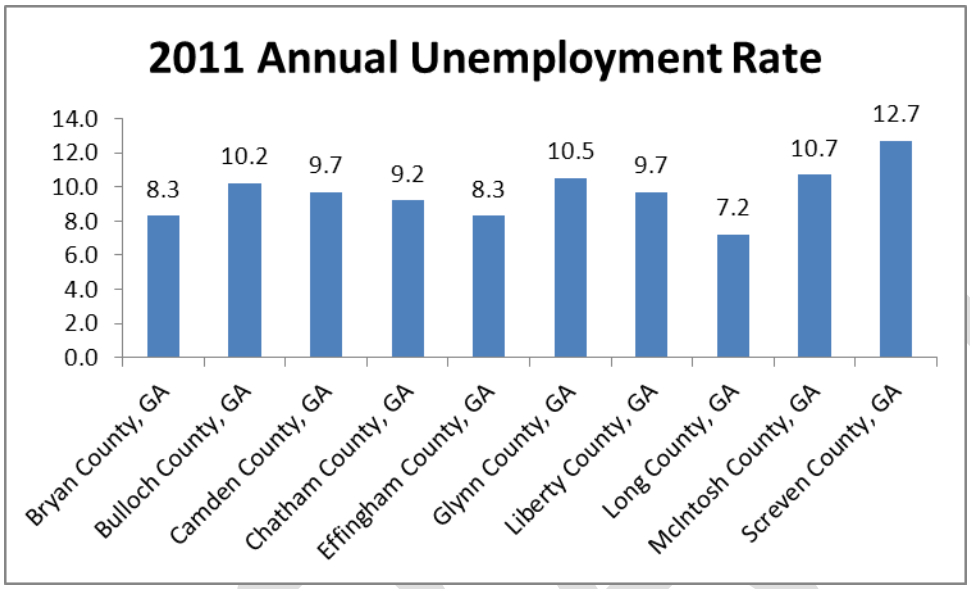
[1] U.S. Census Bureau http://factfinder2.census.gov

[2] U.S. Census Bureau http://onthemap.ces.census.gov/

1.1.2 Unemployment

According to the Georgia Department of Labor's 2012 Area Labor Profile[3], the region's 2011 labor force was 310,820, with total employment of 281,372, leaving total unemployment at 29,448, or at a rate of 9.5%. This is significantly higher than the employment figures at the time the 2007 CEDS was initially drafted.

Chart 1 2011 Unemployment Rate by County[4]



1.1.3 Income and Wages

The 2010 regional per capita personal income (PCPI[5]) was $30,129 which is approximately 87% of Georgia's 2010 PCPI of $34,747 and 75% of the U.S. PCPI of $39,937. The local PCPI in 2010 ranged from a high in Bryan County at $39,394 to a low in Long County of $21,497.

For all industries in the ten-county coastal region the 2011 average weekly wage was $729. This is 84% of the average weekly wage for all industries for the state ($867[6]). Table 2 shows the average weekly wages for each county in the region. The highest wages are found in the more urbanized counties.

[3] Georgia Department of Labor *Area Labor Profile*

http://explorer.dol.state.ga.us/mis/Profiles/rc/12%20-%20Coastal%20Georgia%20RC.pdf

[4] Georgia Department of Labor *Labor Market Explorer* http://explorer.dol.state.ga.us

[5] U.S. Bureau of Economic Analysis http://www.bea.gov/

[6] Georgia Department of Labor *Georgia Employment and Wages 2011*http://explorer.dol.state.ga.us/mis/Current/ewcurrent.pdf

Table 2: Average Weekly Wage, 2011[7]

County	Bryan	Bulloch	Camden	Chatham	Effingham	Glynn	Liberty	Long	McIntosh	Screven
Average Weekly Wage	$585	$587	$709	$760	$669	$697	$697	$498	$538	$562

1.1.4 Employment by Occupation

Table 3 shows the change in employment from 2000-2010 in each of the 11 major economic sectors as identified by the Georgia Statistics System's Employment Analysis[8]. The most important industries in terms of the absolute number of jobs created as well as the growth rate of employment were Education and Health Services, which grew by 45.4% over the decade, and Public Administration, which grew by 20.5%. The sectors to suffer the greatest job losses were Manufacturing and Construction.

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[7] Georgia Department of Labor *Georgia Employment and Wages 2011* http://explorer.dol.state.ga.us/mis/Current/ewcurrent.pdf

[8] Georgia Statistics System http://www.georgiastats.uga.edu/ssharega.html

Table 3: Employment Changes 2000-2010

Sector	Employment 2000	Employment 2010	Employment Change	Percent Growth 2000-2010
Trade, Transportation, and Utilities	48,256	50,020	1,764	3.7
Education and Health Services	33,877	49,243	15,366	45.4
Leisure and Hospitality	29,749	33,907	4,158	14.0
Manufacturing	26,862	20,681	(-6,181)	(-23.0)
Professional and Business Services	21,894	23,307	1,413	6.5
Public Administration	15,062	18,148	3,086	20.5
Construction	12,659	9,781	(-2,878)	(-22.7)
Financial Activities	8,202	9,115	913	11.1
Other Services	7,784	7,031	(-753)	(-9.7)
Information	3,572	2,381	(-1,191)	(-33.3)
Natural Resources and Mining	976	856	(-120)	(-12.3)
TOTAL	208,893	224,470	15,577	7.5

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1.2 Population

1.2.1 Total Population

The total population of the region recorded in the 2010 Census was 654,810, a 17.3% increase over the 2000 Census population count of 558,350. The Georgia Governor's Office of Planning and Budget projects that the regional population will increase to 878,998 by the year 2025[9]. Leaders in the coastal region suggest that the total population may have been

[9] Georgia Department of Labor *Area Labor Profile*

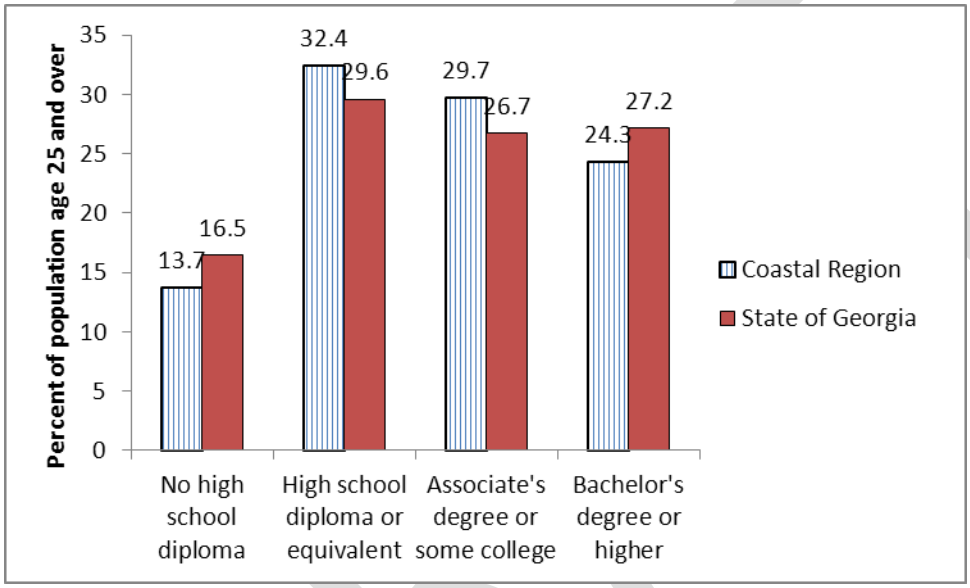
http://explorer.dol.state.ga.us/mis/Profiles/rc/12%20-%20Coastal%20Georgia%20RC.pdf

significantly undercounted. This may be further exacerbated by the Census Bureau's inability to count some military personnel and undocumented immigrants. Also, seasonal residents play a role in total population because the total population of the vacation areas on the coast fluctuates throughout the year.

1.2.2 Educational Attainment

See Chart 1 for comparison of educational attainment between the coastal region and the State of Georgia:

Chart 2: Educational Attainment[10]



1.3 Geography

The geological history of the region has created the string of ocean islands (barrier islands) and marsh islands (hammocks) through a series of fluctuations in sea level. The higher ridges along the mainland were formed as primordial sand dunes when the higher sea level made the shoreline many miles further inland than where it is today. The region is very flat, with minor exceptions, having the typical topography of the coastal plain found throughout the southeastern U. S. Elevations gradually increase as one moves inland, and the only natural contours are the remnants of prehistoric sea levels and associated movement of materials. Due to the low contour of the region, rivers meander, having many miles of bending, winding channels creating ox-bow lakes, broad floodplains, and the most extensive marsh wetlands on the east coast.

Marshlands and lagoons that were located behind these primordial barrier islands trapped a range of sediments brought by a combination of ocean tides and discharge from major rivers having upland drainage basins many thousands of square miles in area. These sediments,

[10] 2006-2010 ACS Estimates http://factfinder2.census.gov

including various types of sand, clay, and loam, vary from a few inches to many feet in thickness. The earlier deposits served as the natural base for vegetation, which in turn led to the formation of organic-rich topsoil as the debris of thousands of generations of plant and animal life were deposited.

1.4 Workforce Development

The Coastal Workforce Services (CWS) region includes Bryan, Bulloch, Camden, Chatham, Effingham, Glynn, Liberty, Long, and McIntosh Counties. The Coastal Workforce Services region does not include Screven County while the CRC does include Screven County. In 2005, Market Street, Inc. presented the Coastal Workforce Services Strategic Plan, which was subsequently updated in 2008, 2009, 2010 and 2011[11]. The priority workforce development issues in the Coastal Workforce Services region as purported in the strategic plan are summarized here. A series of reports including *A Review of Trend Data* (analysis of existing studies), *Supply Analysis* (analysis of the workforce), *Demand Analysis* (analysis of the employers), and *Summary of Public Input* (garnered via focus groups and an online survey) were presented to the Steering Committee. Those reports formed the foundation for identifying the key issues facing coastal Georgia.

Sections 1.4.1 through 1.4.4 are key conclusions reported in the Strategic Plan and most recent update.

1.4.1 Review of Trend Data

The priority workforce development issues in the Coastal Workforce Services region and its component communities include:

- A high level of poverty threatens the quality of the region's labor pool, and presents obstacles to the effective educating and training of the nine counties' existing and future workforce;
- Low rates of educational attainment, inferior skill levels for high-wage, New Economy industries, and a poor work ethic and level of occupational "soft skills" further threaten quality economic development in the region. These factors risk disinvestment and expansion outside the region by existing companies, and pose a difficulty in recruiting new firms to the area;
- There is a "disconnect" between educational and workforce providers, regional businesses and the available and potential workforce, thereby threatening the effective, sustainable economic growth that would raise average incomes and improve quality of life;
- The lack of affordable housing, combined with strong growth in low-paying service and tourism sector employment, is creating obstacles to the co-location of jobs and workers in their areas of residence; and

[11] Coastal Workforce Services *2011 Comprehensive Local WIA Plan Update* http://www.coastalworkforceservices.org/storage/py11Update.pdf

- Integration of workforce strategies with economic development strategies is essential to make the region's workforce and economy more competitive and sustainable.

1.4.2 Supply Analysis

Based on the analyses in the Strategic Plan, the following key points describe the coastal region's labor force:

- Because the coastal Georgia region is so large and diverse, its component communities often experience very different patterns of growth, infrastructure needs, workforce issues, etc.;
- The population and labor force have effectively sustained strong growth, but this trend may weaken as the population ages with the retirement of the Baby Boom generation. The resulting contracted workforce, lower birth rates, and larger fixed-income retired population could strain regional resources in the short and long term;
- High poverty rates, low labor force participation rates, and low per capita income levels suggest that the existing population is in great need of more economic opportunities to develop and sustain an acceptable standard of living;
- The coastal region's public school systems, based on the number of failing schools, high drop-out rates, and other indicators, are falling behind the standard necessary to effectively educate the region's youth and decrease the percentage of the population without a high school diploma. In the 21st century, a high school diploma and, increasingly, a two- or four-year degree, are critical to obtaining and maintaining a viable career path; and
- Counties with a large number of low-income families and "at-risk" youth also had differing needs for certain workforce development programs. These communities often experience high dropout rates, and have more critical needs for programs that target youth early in their school years to make them aware of potential careers and post-educational options.

1.4.3 Demand Analysis

The following are the key points of the detailed analysis of the demand-side of coastal Georgia's economy, determined by analyzing indicators of establishments, employment, wages and earnings, key sectors, and small business resources.

- Coastal Georgia has strength in several sectors expected to continue to be strong at both the national and local level: Transportation and Warehousing, Tourism, Aerospace, Wood Products, and Health Care, and certain growing sub-sectors of Manufacturing (Transportation Equipment and Nonmetallic Mineral Products);
- The tourism employment opportunities upon which portions of the region are reliant do not offer wages that will help raise the low per capita income and average earnings of the region's workforce;

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- Coastal Georgia has many economic strengths in a diversity of fields (Manufacturing, Transportation and Warehousing, Tourism, Health Care, and Military-related activities) that it could effectively leverage if the proper, strategic steps are taken;
- Employment opportunities are limited for the region's "hidden" workforce – the long-term unemployed, military spouses, persons with disabilities, workers displaced from low-skill occupations who have not obtained additional skills or education, high school dropouts, etc.; and
- Long-range industry projections indicate industries projected to have the most growth in our area through 2016 include food services, health care, social assistance, recreation, manufacturing, and warehousing and storage. With the growing emphasis on "green" jobs and technologies, the region is also well-suited to take advantage of emerging industries that may provide jobs involving protecting ecosystems, reducing waste and pollution, reducing energy usage, or lowering carbon emissions.

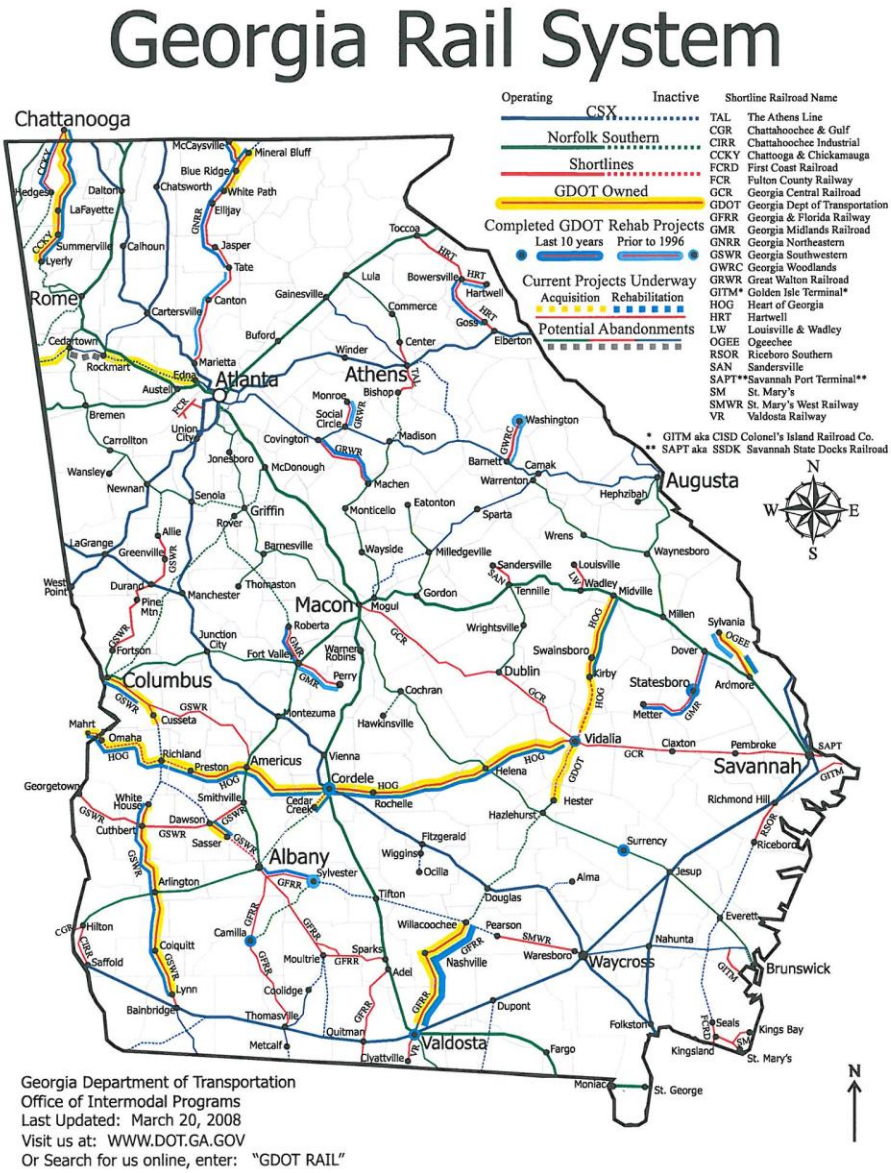
1.5 Transportation Access

Interstate 95 bisects the region from the South Carolina border in the north to the Florida border in the south. This interstate is the primary north/south corridor between New York City, New York and Miami, Florida. Interstate 16 is the primary east/west connector for central Georgia, connecting Savannah in the east with Macon and access to Interstate 75 (access to Atlanta) in the west. Interstate 16 crosses Interstate 95 in Pooler, near the Savannah port facilities, making the northern part of the region a prime location for industrial development dependent upon access to multi-modal transportation and infrastructure.

The Savannah/Hilton Head International Airport provides the region with access to international passenger and cargo air service. The airport is located strategically near the junction of Interstates 95 and 16 and the Savannah Ports, while being only minutes from the historic downtown Savannah tourism destinations.

The region is served by two Class I railroads (CSX and Norfolk Southern) and various short line operators, with access in every county except for McIntosh[12]:

[12] Georgia Department of Transportation
http://www.dot.state.ga.us/maps/Documents/railroad/Georgia_Rail_Map_plain.pdf



Map 2 Rail System

1.6 Resources and Environment

The coastal region contains a number of vital resources to support its economic activity, such as timber, fishing, and boating access. The diversity of the coastal region's resources provides its inhabitants and visitors with a wealth of ecological, economic, and recreational advantages. This brief overview hints at the importance of all the coastal Georgia resources. Additional information is available in the Regional Plan of Coastal Georgia[13] and the Regional Important Resources Plan[14].

1.6.1 Georgia Ports Authority

Georgia's accessible ports are a major advantage for the manufacturing and distribution companies located throughout the region. Savannah's Mason Intermodal Container Transfer Facility enables a seamless transfer of shipping containers onto trains and shortens the ship-to-market transit time to its delivery area. Facilitating global trade through strategic U.S. East Coast gateways, the Georgia Ports Authority is a leader in the operation of modern terminals and in meeting the demands of international business. Georgia's ports combine industry innovations with proven flexibility to create new opportunities along the entire global logistics pipeline, delivering what the market demands.

Port of Savannah

The Port of Savannah specializes in the handling of container, reefer, breakbulk, and roll-on, roll-off (RoRo) cargoes.

The port includes:

- The Garden City Terminal is Savannah's ultra-modern, dedicated container terminal. At 1,200 acres, it is North America's largest single-terminal container facility.
- The 208-acre Ocean Terminal is a combination breakbulk and RoRo facility handling forest and solid wood products, steel, automotive and heavy equipment, project shipments and heavy-lift cargoes.

Port of Brunswick

The Port of Brunswick specializes in the handling of breakbulk, agri-bulk, and RoRo cargoes. Three facilities comprise the Port of Brunswick:

- At 1,700 acres, Colonel's Island Terminal moves both RoRo and agri-bulk commodities. Its autoport facility handles more than 12 major manufacturers.
- Mayor's Point Terminal is a 22-acre dedicated breakbulk facility with 11 acres of open space, a 30-ton gantry crane and is serviced by CSX and

[13] Coastal Regional Commission *Regional Plan of Coastal Georgia* http://www.crc.ga.gov/docs/2011_Regional_Agenda_Update_KS_122711.pdf

[14] Coastal Regional Commission *Regional Important Resources Plan* http://www.crc.ga.gov/docs/RIR_CRC%20Resource%20Plan_NewACUB_1_2012.pdf

Norfolk Southern rail systems. Mayor's Point Terminal is a 22-acre facility specializing in forest products and general cargo.

- The Marine Port Terminal's 172-acre facility handles a diverse mix of breakbulk and bulk commodities.

Ports and Channel Maintenance

Shipping channels and harbors serving the world-class ports in Savannah and Brunswick require extensive dredging in order to maintain the depths required to accommodate ocean-going vessels. The millions of cubic yards of material removed in these operations are placed in "spoil areas" approved by the U.S. Army Corps of Engineers. Conditions for carrying out dredge operations and for disposing of dredge material are permitted and monitored by the regulatory branch of the Corps. Dredging for harbor and channel maintenance is essential to ensuring the economic benefits of coastal ports. The deepening of the Savannah Harbor is one of the highest priority economic development projects in the State of Georgia.

1.6.2 Military Bases

Military facilities are critical to Georgia, which is one of the largest recipients of federal defense spending. The Coastal region is home to Fort Stewart, Hunter Army Airfield, the Federal Law Enforcement Training Center, the Townsend Bombing Range, and Kings Bay Naval Submarine Base. Two installations in particular provide the backbone of coastal Georgia's defense-related employment:

- Fort Stewart and Hunter Army Airfield combine to form the largest armor training base east of the Mississippi, covering 280,000 acres including parts of Liberty, Long, Tattnall, Evans, Bryan, and Chatham counties in Southeast Georgia. Hunter Army Airfield is home to the Army's longest runway on the east coast (11,375 feet) and the Truscott Air Deployment Terminal. Together these assets are capable of deploying units such as the heavy armored forces of the 3rd Infantry Division or the elite light fighters of the 1st Battalion, 75th Ranger Regiment. Fort Stewart and Hunter Army Airfield are the home of the 3rd Infantry Division, and support over 22,000 active duty personnel and 35,000 of their family members. The installations employ over 1,000 civilian workers. The estimated economic impact of the base on southeast Georgia is $7.13 billion in 2011[15].
- Kings Bay Naval Submarine Base in Camden County houses several U.S. Navy Trident nuclear submarines on the 16,000-acre installation. The Navy employs approximately 9,000 workers (military, civilian, and contractors) at the base. The economic impact of Kings Bay payroll in 2009 was estimated to be $600 million, with additional economic benefits imparted through goods and services and retirees[16].

[15] Coastal Regional Commission *Economic Impact Statement* http://www.crc.ga.gov/planning/jlus/ECI_Trifold_May2011.pdf

[16] Camden Partnership *Economic Impact Statement*

http://www.thecamdenpartnership.org/economic-impact?layout=blog

1.6.3 Prime Agricultural Land

Prime agricultural land has always been a scarce commodity in the coastal region. Agriculture is not economically profitable in most of the coastal counties, with the exception of Bulloch, Screven, Long, and portions of northwestern Effingham counties. The lack of farming in the region is not caused by a recent decrease in prime farmland. The tidal and non-tidal marshes and wetlands that comprise nearly 50% of the land area in the region are not conducive to farming.

1.6.4 Forest Lands

Coastal Georgia has an enormous area of land used for commercial forests. Of the region's total land area, about 3,300 square miles, is forested[17]. In addition to this commercial forest, another 17% of the land area in the region is held by local, state, or federal government entities, and much of this land is also forested. Although forestry itself is a relatively small employer in the region, manufacture of paper and other forestry products is a major enterprise, employing workers in plants scattered throughout the region.

Forestry as an economic enterprise is also important because timber companies own much of the land on the fringes of developed areas, including lands that are periodically marketed for residential and commercial uses. Due to the sheer size of these tracts and their proximity to developing areas, projects proposed on former timberland are often among the largest, in terms of both gross acreage and volume of construction. In some cases, forestry companies have their own development subsidiaries, while others may simply sell the land to independent developers.

1.6.5 Climate

The coastal region is classified as subtropical, with both latitude and proximity to the Atlantic Ocean resulting in moderate temperatures. Average winter temperature is about 45 degrees and the average summer temperature is near 80 degrees. Temperature exceeds 90 degrees from 75 days (coastal) to 80 days (inland) a year. Freezing temperatures in winter are infrequent (averaging 12 days a year on the coast, 25 days a year inland) and seldom last longer than half a day at a time. Humidity is high, averaging between 60 percent and 75 percent.

Annual rainfall ranges between 49 and 54 inches, with slightly higher levels just inland from the coast. Snow is rare and short-lived, although in winter hail and freezing rain are not uncommon. Seasonally, rainfall is greatest between June and September, when over one-half of the annual rainfall occurs in one-third of the year. Because of this pattern, there is a seasonally high water table (superficial aquifer) in October. November is the driest month, with an average of about two inches of rain. Year round, there are between 75 and 80 days when more than one-tenth of one inch of rain falls.

Like any coastal area along the Atlantic seaboard, coastal Georgia is subject to hurricanes and severe tropical storms. Due to the contour of the eastern shoreline of the Southeast, Georgia is more protected from the open ocean and therefore somewhat less prone to

[17] The University of Georgia Cooperative Extension *Georgia County Guide* 2007

hurricane risk than many other coastal areas. Historically, storms of hurricane intensity occur less than once in 10 years and very few of these have produced severe damage.

1.6.6 Wetlands

With about half of the region's land area equally divided between tidal and freshwater wetlands, public programs regulating their use are of obvious concern to coastal Georgia.

The Section 404 program under the Clean Water Act does not prohibit development activities within jurisdictional wetlands. However, due to the extensive requirements for identifying potential impacts, seeking alternative sites and devising methods of controlling impacts, the development of such areas is severely restricted. Banks, developers and others involved in land development are justifiably apprehensive of projects in areas that could be construed as jurisdictional wetlands. On the other hand, there are many exemptions from the federal law, including agriculture (for existing acreage in farmland), silviculture (forestry), and isolated (non-contiguous) wetlands.

1.6.7 River Basins and Floodplain

There are five river basins in the coastal region: The Savannah, the Ogeechee, the Altamaha, the Satilla, and the St. Marys. Most of the coastal land area is within the 100-year floodplain, as determined by the Federal Emergency Management Agency (FEMA) and depicted on the federal flood insurance maps.

1.6.8 Barrier Islands

All 100 miles of Georgia's ocean beaches are on the seaward faces of barrier islands. In spite of their obvious attraction for commercial and residential use, ten of the 18 major barrier islands along Georgia's coast are in public ownership. Except for Jekyll Island in Glynn County, none of these publicly owned islands are accessible by car from the mainland. The rest are designated for wildlife management, environmental research, and/or undeveloped recreational uses. Of the total land area of the 15 largest barrier islands, about 65 percent is in public ownership (36 percent state and 29 percent federal). The Georgia barrier islands are unparalleled in the continental United States as undisturbed islands in their natural state. Because of their uniqueness, importance to environmental research and habitat for numerous species, and particularly because of their ownership, it is unlikely that development will occur on any of the undeveloped islands in the foreseeable future. Due to the focused concentration of development potential on only three of the ten largest barrier islands in Georgia, those with this potential are confronting considerable growth pressure.

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2 Analysis of Economic Development Problems and Opportunities

The Regional Plan of Coastal Georgia (2010) was the result of a comprehensive planning process that included participation from local cities and counties, involvement of stakeholders, support from partners and collaboration with other regional leaders. The list in Table 4 is a compilation of many of the issues and opportunities that were identified during planning processes. This list was refined through stakeholder input, and the strategies in the Regional Work Program correspond to these issues and opportunities.

Table 4: Regional Plan of Coastal Georgia Issues and Opportunities

Economic Development: Issues
Shift from higher paying manufacturing jobs to lower paying service jobs.
Lack of sufficient jobs or economic opportunities for rural residents.
Few jobs for skilled laborers.
Need for more employment diversity – too much reliance on a few large industries.
Lack of labor skills to support a diverse group of industries.
Perception of low educational attainment for local residents in Coastal Georgia.
Only a minor portion of local economies are small and minority businesses.
Lack of communication between governments, authorities, businesses and citizens in planning and implementing economic development plans.
Viability of many downtowns is diminished by a shift from locally owned retail stores to regional shopping centers.
Some developers perceive Coastal Georgia as a tough place to do business.
Lack of support programs for entrepreneurs.
Competition from South Carolina and Florida to attract desired businesses.
Need more local services and retail so residents can meet their consumer needs in their community.
Need to promote expansion of existing businesses and new industry.
New development is favored over existing redevelopment opportunities.
Decline in coastal commercial fisheries industry.

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Global economic factors and anti-forestry attitudes threaten the traditional silviculture industry in Coastal Georgia.
Jobs lost due to competition with lower labor costs, lower taxes, and relaxed environmental regulations available in foreign countries.
Water consumption limits on industry, commercial, forestry, pose constraints for growth and development.
Economic growth and development may be constrained by limits on processing wastewater.
Need to coordinate the location of available housing with major employment centers.
High number of brownfield sites in the region.
Corridor management on I-95 and I-16 and the interchange gateways is needed to ensure orderly and attractive development.
Lack of funding for attractive landscaping and litter management programs necessary to maintain the scenic quality of corridors.
Coordinated informational and directional signage along entrance corridors to direct tourists.
Need for scenic routes as alternatives to the Interstates.
Balancing the need for billboards and signs with character and aesthetics of the region.
Important natural, cultural and historic sites and structures are undeveloped and/or underutilized.
Lack of access to undeveloped barrier islands constrains tourism potential.
Lack of regional tourism marketing collaboration.
Lack of regional tourist attraction information resource.
Economic Development: Opportunities
Make the most of tax collections and funding for tourism in lieu of new state and local tax increases.
Focus limited financial resources toward infrastructure improvements such as sidewalks, lighting, and crosswalks along critical gateway intersections and corridors.
Draft a regional way-finding master plan.
Promote coordination of marketing for festivals and events related to the important natural, historic, and cultural resources of the coast.
Seek funding and support for implementation of the Coastal Georgia Greenway, Georgia Coastal Rail Trail and Southern Passages development plans.
Develop and adopt regulations that will create uniform billboard standards and amortization of non-

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conforming billboards.
Establish regional water taxis along the coast to barrier islands and the Savannah River.
Capture a greater share of regional tourism dollars.
Promote and support agri-tourism and associated programs.
Highlight pristine nature of barrier islands in tourism materials.
Focus efforts to share cost where appropriate across the region to promote tourism.
Disseminate existing model ordinance for community appearance and property maintenance.
Promote more high value, environmentally sound industries.
Market regional labor force, especially for industries requiring large numbers of highly trained employees.
Market existing industrial parks with the infrastructure in place.
Promote proximity to the ports and regional transportation.
Capture skills and knowledge of retirees relocating to the region.
Enhance catastrophic incident preparedness by working with the All Hazards Council in preparation of a Regional Catastrophic Preparedness Plan.
Protect agricultural uses to retain vital farmland and support local business by providing agriculture services and materials.
Encourage participation in existing regional leadership programs.
Reduce public costs (and taxes), share revenues, protect environmentally sensitive areas, manage economic opportunities, and maintain local control of growth and development by fostering cooperation between jurisdictions.
Support the quality K-12 educational systems already in place.
Take advantage of the numerous options for advanced education and workforce development.
Promote the strong healthcare and engineering educational opportunities in the region.
Tap into the supply of professionals, technical information, and expertise available in the region (i.e. SCORE)
Market competitive tax and utility rates.
Support existing local chambers of commerce and development authorities in their promotion the area's towns, counties, and local businesses.
Coordinate efforts with two regional development authorities operating in Coastal Georgia.

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Attract businesses with airports, transit systems, and other regional transportation initiatives.
Promote available commercial property and infill properties in the already-populated areas of the region.
Encourage private and public partnerships to redevelop neglected areas under Georgia's Urban Redevelopment Act.
Support the viable coastal fisheries industry through state and local programs.
Maintain undeveloped land in the region that is best suited for forestry purposes.
Recruit growth industries that can use the skills of workers in declining industries.
Develop use of alternative fuels.
Develop or enhance collaboration between local economic development agencies and community based organizations.
Begin international outreach by tapping into Georgia Department of Economic Development mechanisms.

2.1 Local Workforce Investment Strategies

The following Strategy Overview was developed through a strategy planning process engaged by Coastal Workforce Services (CWS) and reported in the Strategic Plan. This section provides a broad overview of the basic goals and objectives that comprise the strategy as pursued by CWS. The goals and objectives were derived from the key findings of four deliverables of the strategy development process – Review of Trend Data (analysis of existing studies), Supply Analysis (analysis of the workforce), Demand Analysis (analysis of the employers), and Summary of Public Input (garnered via focus groups and an online survey).

The full description of the goals and objectives can be found in the Strategic Plan document. The Workforce Board will monitor progress and continue to set policy for the program.

The following are the goals and objectives of Coastal Workforce Services *(CWS)*[18]*:*

Goal 1: Enhance program coordination and service delivery of Coastal Workforce Services operations.

Objective 1: Address the perception that Coastal Workforce Services is not meeting the needs of all constituencies in the nine counties *[Screven County is not a part of the CWS region]*.

Objective 2: Enhance regional coordination through the efforts of the Workforce Investment Board and the Executive Director.

[18] Market Street Inc. *Coastal Workforce Services Strategic Plan*

Objective 3: Leverage available funding by creatively utilizing federal Workforce Investment Act funding and other potential resources.

Goal 2: Raise awareness among all regional workers and employers about Coastal Workforce Services programs and other area workforce development resources.

Objective 1: Create and implement a multi-faceted marketing plan for the work of Coastal Workforce Services and the Region's workforce development system.

Objective 2: Ensure that all constituencies throughout coastal Georgia are served with timely and accurate information.

Goal 3: Renew partnerships with regional private sector, education, training and community development partners to maximize breadth, integration and impact of Coastal Workforce Services programs; and to eliminate gaps and redundancies in regional workforce development efforts.

Objective 1: Institutionalize and strengthen the ties between all constituencies in the Region: Coastal Workforce Services, the private sector, educational resources, training programs, and community development organizations.

Goal 4: Address the primary issues facing the workforce, and respond to staffing needs of employers in the region.

Objective 1: Enhance accessibility to employment, education, and workforce development resources.

Objective 2: Raise job and career awareness among the youth of coastal Georgia.

Objective 3: Address the needs of the "hidden" workforce.

The action steps that are described in detail in the Strategic Plan will allow Coastal Workforce Services to begin the process of enhancing its operations and the workforce development system of coastal Georgia. The Strategic Plan is a working document which is revised as significant changes occur and new needs arise in the region.

2.2 Development Investments

Economic Development Administration (EDA) has supported a number of projects in the Coastal Georgia region over the years. Map 3 presents a summary of Public Works projects from 1975 to 2011. The CRC is continually working with member jurisdictions to develop projects suitable for EDA funding.

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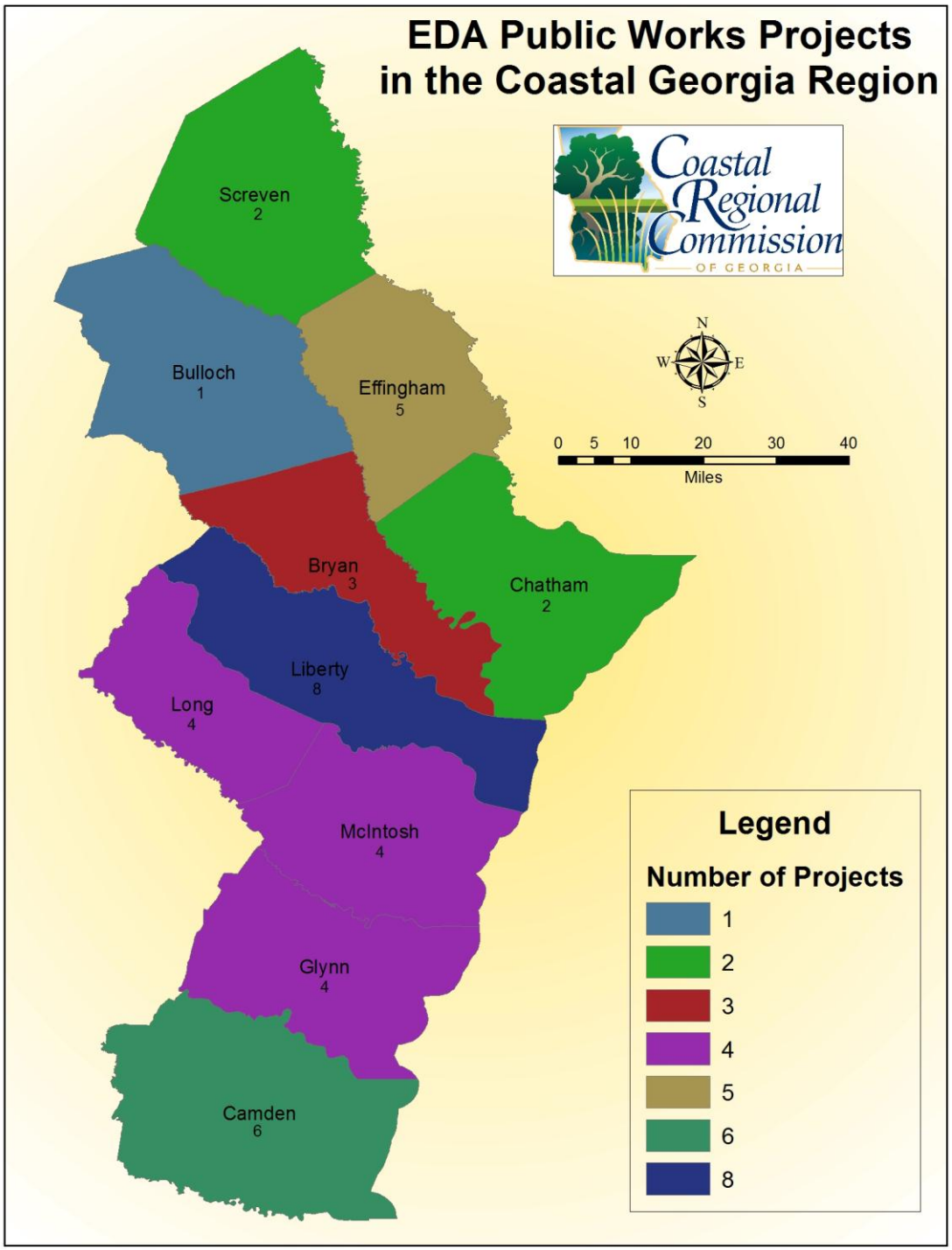
Map 3: EDA Public Works Projects Map



2.3 Economic Clusters

This CEDS document has various components that reflect the importance of clusters in a regional economy. This is evident in the "Plan of Action" and the "Past Development Investments" components of the report which highlight the past and new investments that directly support these clusters. The Coastal Region is home to over 150 registered foreign-owned companies, and over 90 of these companies directly relate to the clusters of the region with the most dominant influence being related to the Port of Savannah and the Logistics/Transportation cluster. With the deepening of the port and the anticipated increase in trade, the port as well as the ancillary industries associated with the cluster will be in a growth mode for the next decade and many of these projects are included in the "Plan of Action" section.

EDA has made significant investments in the Coastal Region related to the Port and the infrastructure needs of the foreign-owned companies operating within any one of the coastal counties with the most recent investment to benefit Liberty County and the Firth-Rixson facility and Chatham County with the Mitsubishi facility at the Port.

The Logistic/Transportation cluster is also an economic priority with the State of Georgia, which developed an economic growth strategy creating "Centers of Innovation" to target resources to the state's dominant clusters. The Center of Innovation for Logistics and Transportation is located in the region in Savannah. In fact in 2011 Michael E. Porter conducted a cluster performance /competitiveness study for the State of Georgia and based on number of total employees, three of the top ten clusters for Georgia are located in the Coastal Region. As the economic clusters emerged in the coastal region it was basically a horizontal impact, but the growth of each cluster is now beginning to create vertically influenced clusters which have a greater and more sustainable impact.

The primary clusters of the Coastal Region can be identified as the following:

(1) Logistics/Transportation
- Marine transportation
- Transportation arrangements
- Warehousing
- Terminals
- Air transportation
- Trucking rail transportation

(2) Aerospace Vehicles and Defense
- Aircraft
- Defense equipment
- Missile and space vehicles
- Aircraft maintenance/ancillary

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(3) Forest Products
- Paper/paper products
- Prefabricated materials
- Pellets/biomass
- Lumber

(4) Hospitality/ Tourism
- Attractions
- Accommodations
- Services

(5) Military
- Defense systems
- Civilian support
- Services

Current activities and proposed projects in the region that relate to economic clusters and add value to the economic base include energy, agribusiness, movie studios and advanced manufacturing. The CEDS document contains various anticipated projects that will encourage the growth of the clusters and correspondingly provide opportunities to place into motion a regional economic development strategy that will create family-sustaining jobs, leverage investments and maintain the region's global competiveness.

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3 Goals and Objectives—Defining Regional Expectations

The essence of a Comprehensive Economic Development Strategy is to establish a document that will identify, define and establish a direction for economic growth for a specific geography. This document will serve as a guide to present goals, objectives and strategies that will facilitate actions to encourage economic growth, diversify an economy, create family-sustaining jobs, leverage private investments and stimulate a process for regional collaboration.

The framework from which the CEDS document can be effective must be inclusive of the economic development decision makers' identified needs that are incorporated into a set of goals and objectives that are real, attainable and measureable. The Coastal Regional Commission, through a process of surveys, questionnaires, meetings and briefings, offer the following goals and objectives as the course of proposed activities that will ultimately improve the economic vitality of the ten-county region.

Goal 1: Advocate and promote the deepening of the Savannah Port as the key economic development project for the Coastal Region; facilitate opportunities to encourage growth at the ports in Savannah and Brunswick and the redevelopment of a port in Camden County.

Objective 1: Identify and develop projects that will benefit from the deepening of the Port in Savannah.

Objective 2: Establish interaction with Port Authority members to develop needed infrastructure at the Savannah and Brunswick ports.

Objective 3: Support and collaborate with county economic development organizations to develop inland ports, intermodal infrastructure and/or new ports.

Objective 4: Promote and increase development activities with the logistics cluster in the region.

Goal 2: Identify and develop long-term plans to encourage growth and adequate infrastructure to ensure industries' ability to expand or locate in the Coastal Region.

Objective 1: Support and assist counties, economic development organizations, cities and the private sector in securing funds for the development of needed infrastructure to include sewer and water, transportation, fiber, energy and smart design.

Objective 2: Coordinate related infrastructure programs with state and federal programs to match and/or leverage local needs.

Objective 3: Initiate planning process for the establishment of an energy corridor and identify appropriate project opportunities.

Objective 4: Prioritize infrastructure projects that impact industries related to regional clusters and establish long-term and short-term timetables for each.

Goal 3: Stimulate economic growth with the development of incubators throughout the Coastal Region that will advance entrepreneurship and provide space for start-up manufacturing

Objective 1: Assist county economic development organizations with incubators/speculative buildings as a means to attract growth.

Objective 2: Support and assist Georgia Southern University in the development of incubator space and/or fabrication lab near the campus.

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Objective 3: Identify opportunities to utilize and develop brownfield sites as potential sites for manufacturing incubators.
Objective 4: Collaborate with universities, SBDC, military bases and WIB to encourage entrepreneur programs that could populate the incubators and form a regional incubator coalition to aid and support one another.

Goal 4: Support and assist regional economic development entities to market the Coastal Region on a national and global basis.

Objective 1: Collaborate with county economic development authorities to establish industrial marketing efforts of the region.
Objective 2: Identify and promote acceptable training programs to assist tourism bureaus, chambers, downtown development authorities and economic development organizations on how to effectively market online.
Objective 3: Assist and encourage the regional development authorities to establish marketing techniques and to attend national and international trade shows to promote attributes of region.
Objective 4: Coordinate the county development efforts, the industry clusters and the location incentives to overseas markets and investors via the DEcD foreign offices.

Goal 5: Identify and develop opportunities that will provide access to capital to facilitate and expedite economic growth in the Coastal Region.

Objective 1: Identify opportunities to increase the access to capital for expansion investment and the leverage of private sector investments.
Objective 2: Continue to pursue the designation of an EB-5 Regional Center to attract foreign investments.
Objective 3: Support and promote financing programs available via CADDA, county RLFs, regional CDFIs as well as appropriate state and federal programs.
Objective 4: Encourage greater participation in economic development with the region's banks.

Goal 6: Collaborate and develop, where necessary, opportunities to provide workforce training programs to sustain a globally competitive workforce with current and appropriate skill sets.

Objective 1: Participate and support the expansion and/or location of technical schools in the coastal region.
Objective 2: Collaborate with the Workforce Investment Board to initiate training programs related to skills sets of the coastal region's industry clusters.
Objective 3: Encourage the support of the WIB and technical schools to assist in the development of training for the promotion of post-disaster business continuity strategic plans.
Objective 4: Encourage and support local county economic development organizations, state departments and educational institutions to establish a regional business calling program to identify specific training needs.

Goal 7: Encourage intergovernmental cooperation between the local/county governments, economic development organizations, downtown development authorities, tourism agencies, chambers of commerce and the universities operating in the Coastal Region.

Objective 1: Continue to facilitate and foster an economic developers alliance with the county economic development professionals, the Governor's Economic Development Board members residing in region and State regional representatives.
Objective 2: Encourage the implementation of projects within the Regional Plan of Coastal Georgia that advocate collaboration.

Objective 3: Continue to provide technical assistance to the small cities and community-based organizations in the establishment of development /redevelopment strategic plans.
Objective 4: Advance and promote the resources of the Coastal Regional Commission via newsletters, public presentations, web-site updates that will illustrate collaborative success stories.

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4 Community and Private Sector Participation

The Coastal Regional Commission encourages opportunities to partner with the Region's local governments, community-based organizations and the private sector that will collectively facilitate growth in the ten county region. These partners include but are not limited to the following:

- County and City Governments
- County Economic Development Organizations
- City Economic Development Partners
- Downtown Development Authorities
- Chambers of Commerce
- University Centers
- Military Bases
- Workforce Investment Board
- Convention and Visitors Bureaus
- Private Developers, Realtors and Banks

Some of the specific organizations included in this collaborative partnership of the Coastal Region and also contributing towards the update of the CEDS document include the following:

- Development Authority of Bryan County
- Development Authority of Bulloch County
- Camden County Joint Development Authority
- Savannah Economic Development Authority
- Effingham County Industrial Development Authority
- Brunswick and Glynn County Development Authority
- Liberty County Development Authority
- Long County Development Authority
- McIntosh County Industrial Development Authority
- Screven County Development Authority
- Camden Partnership
- Kingsland Development Authority
- St. Marys Development Authority
- Middle Coastal Unified Development Authority
- Southeast Georgia Joint Development Authority
- Georgia Ports Authority
- Georgia Center of Innovation for Logistics
- Georgia Power
- Georgia Southern University
- Savannah Technical College

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- Savannah College of Art and Design
- College of Coastal Georgia
- Georgia Small Business Development Centers
- Georgia Department of Economic Development
- Georgia Department of Community Affairs
- Fort Stewart/Hunter Army Air Force Base/ Kings Bay Naval Submarine Base

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5 Strategic Projects, Program, and Activities

This CEDS attempts to identify regional projects, programs, and activities designed to implement the goals and objectives stated above. Again, this is not a comprehensive or exhaustive list. The ongoing activities of economic development professionals and organizations will continue to define and expand this list.

5.1 Suggested/Proposed Projects

This section contains a partial listing of suggested and proposed projects reported by the region's 10 counties and 35 cities. The following is a synopsis of information on potential projects provided by the survey respondents:

Potential Projects:

Regional Projects

- Continuation of a Coastal Georgia Economic Development forum to identify and engage in projects of regional collaboration and to serve as a liaison to State legislators in Atlanta
- Advocate the development of a post-disaster business recovery planning strategy for the region in cooperation with the county emergency management personnel
- Facilitate the establishment of a business incubator strategically located in the region to best address the needs of the business community
- Initiate regional programs to assist and address employers' needs, such as fixed route transit and commuter pools, access to training and capital, and access to new markets
- Promote coordination of business retention and expansion programs for existing industries in cooperation with respective county economic development organizations and the GA Department of Economic Development
- Identify and promote the opportunities to gain access to capital that will leverage private investments and create sustained employment

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Bryan County

- New interchange on I-95 and Belfast Keller Road and Belfast Commerce Centre Industrial Park
- US 17 improvements in Richmond Hill
- Phase II development of Interstate Commerce industrial park
- Wastewater treatment facility construction
- Fully developed industrial parks on I-16 and I-95
- Sewer upgrades, hydrants and looped system in Richmond Hill, particularly along GA Hwy144 to serve commercial areas
- Implement recommendations from the Bryan County Economic Diversification study
- Workforce development initiatives

Bulloch County

- The Development Authority of Bulloch County owns approximately 200 acres at the Interstate 16/Highway 301 interchange, most likely to be the focus of industrial development. Bulloch County is working towards master planning of the larger interchange area. Anticipated needs for this project include infrastructure support for industry desiring to locate in the park, such as water and road
- Gateway Regional Industrial Park- Phase II of the park includes an additional 160 acres for development. Additional funding may be needed to complete water and road infrastructure, etc.
- Incubation/manufacturing lab space with Georgia Southern University. The Development Authority of Bulloch County has been in discussion with Georgia Southern University and other local partners to support the development of incubation space and/or fabrication lab space near the

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campus. Creation of these facilities will have a significant regional impact on manufacturing and small business recruitment and job creation

- Statesboro North Bypass; widen SR 67 from Bypass to I-16 and widen Hwy 301 north from Bypass to Sylvania in Screven County

Camden County

- Development of a countywide implementation strategy addressing specific economic development actions for each city (Woodbine, St. Marys, Kingsland)
- Development of an impact strategy and actionable steps to participate in the growth of the Jacksonville port expansion
- Acquire and develop additional industrial park lands and construct speculative building as a strategy to attract new and/or expanding industry
- Complete new full-service technical college, including site donation and infrastructure extension
- Complete Naval Submarine Base Kings Bay Joint Land Use Study
- Exit 1 modifications on I-95
- Develop new fairground/sports facility at an estimated cost of $6 million
- Potential new airport or seaport related project and associated industry opportunities
- Implement recommendations from the Camden County Economic Diversification study
- Streetscape project – Osborne Street, St. Marys
- Waterfront Pavilion Expansion – St. Marys
- Multi-Purpose Theater/Convention Center - St. Marys

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- Water/sewer expansion to north end of County to accommodate residential growth
- Development of a strategic master plan for St. Marys
- Design and develop hotel/conference center in downtown St. Marys
- Acquisition of 100 acres of land for development of a business park and installation of infrastructure with 200,000 square foot speculative building w/ ability to expand (St. Marys)
- Water tank for Fire Flow in the area of Georgia Highway 40 and Kings Bay Road, near the Kingsland Business Park
- Infrastructure for Kingsland Commerce Park industrial site to include a water tank for fire flow
- Kingsland Bypass (Colerain Rd) Phases I and II
- Well construction on east side of Kingsland, east of I-95
- North Force Main, Kingsland
- Harriett's Bluff Road Lift Station
- Lift Station at May Creek Road
- East Force Main near Exit 3 and May Creek Road
- Harriett's Bluff Road widened to 4 lanes
- Design and construction of expanded rail access to connect Kingsland with CSX mainline north of Folkston in Charlton County
- Industrial development at former Dow site, Bayer site, and Durango Mill site

Chatham County

- I-16 ramp removal in Savannah (MLK Jr. Blvd and Montgomery St.) and I-16 widening from I-95 to I-516

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- DeRenne Connector improvements
- Improvements necessary to help locate an industry on the megasite
- Identification and development of more industrial sites
- Port deepening in Savannah Harbor
- Improvements necessary to attract more aerospace and advanced manufacturing opportunities
- President Street/Islands Expressway and CSX Railroad Overpass improvements
- SR 21 grade separation at CSXT rail crossing and SR 25 grade separation at Norfolk Southern and CSXT rail crossing
- Develop the Savannah region as a center for materials research and development and build on capabilities including SCAD's industrial design program and HERTY Advanced Materials Development Center
- Invest in warehousing and distribution facilities, as well as film production and digital media industry sectors

Effingham County

- Interstate 16 Logistics Center: Infrastructure development (water, wastewater treatment, and road work)
- Research Forest Business Park: road and rail work
- 1,750 acre public/private development for logistics park
- Development of Effingham Parkway/GA Portway
- Exit 148 Interchange (Old River Road) refurbishments on Interstate 16
- Development of the I-16 Meldrim tract
- Infrastructure for the creation of a new business park west of Rincon

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Glynn County

- Distribution park near I-95
- New terminals at Brunswick Golden Isles Airport and McKinnon Airport on St. Simons Island
- Port expansion at Colonel's Island and other continued investment in Port of Brunswick facility improvements
- Additional rail capabilities
- Existing manufacturing expansions for industries such as Georgia Pacific
- New mixed use projects e.g. Liberty Harbor
- Coastal Logistics Park at Tradewinds: phase I to include infrastructure and access road (estimated cost to EDA= $2 million with $16.4 million in private investment)
- Highways 99 and 341 Sterling Industrial Area; extension of water and sewer
- Tourism product development (Jekyll and St. Simons Island)
- Water and sewer infrastructure upgrades and expansion
- Pad ready industrial site improvements at Tradewinds; estimated cost of $500,000
- Eastgate Commerce Park: sewer line extension project and lift station construction; estimated cost of $1 million
- Brunswick McBride Industrial Park: water system upgrades; estimated cost of $750,000
- Turtle River Global Logistics Park: on-site infrastructure and access road; estimated cost of $2.5 million

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- New parking lot/access road for aviation-related employer; estimated cost of $1 million
- Brunswick Golden Isles Airport industrial site improvements (water/sewer line extensions), access road construction, industrial site aircraft ramp/taxiway improvements, and fire station replacement with a total estimated cost of $4.65 million
- 100,000 SF speculative industrial building; estimated cost $6 million

City of Brunswick (Glynn)

- Implementation of recommendations from the updated Blueprint Brunswick Master Plan study
- Newcastle Street redevelopment
- Highway 17 redevelopment
- Norwich Street redevelopment
- Bay Street redevelopment
- Implementation of Waterfront redevelopment
- Wi-Fi grid for the city
- Development of the Brunswick/Glynn Public Transportation initiative
- Brownfield redevelopment
- Implementation of Altama Community Transformation plan

Liberty County

- Tradeport West infrastructure to include provision of road, water, sewer, drainage systems and rail improvements to service Tradeport West Business Center; estimated cost of $17 million

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- Completions of MidCoast Regional Airport runway, road, water, and sewer extensions; wetland mitigations; master plan design; and hanger expansion at an estimated cost of $10 million
- Tradeport East water reclamation facility; road, water and sewer extensions; grading improvements; and an elevated water tank at an estimated cost of $30 million
- Hinesville Technology Park: road, water, sewer extensions, and grading improvements; estimated cost: $3 million
- Midway Industrial Park phase 3: road, water, sewer, drainage, and grading improvements with an estimated cost of $3 million
- Midway South: road, water, sewer, drainage, and grading improvements; estimated cost of $2 million
- Implement recommendations from the Liberty County Economic Diversification study

- Infrastructure projects that might arise as new prospects consider our area and have requirements of which we are currently unaware

Long County

- SR 57 overpass
- Stafford Dairy Rd improvements from SR 57 to US 84
- Industrial park improvements and infrastructure
- Implement recommendations from the Long County Economic Diversification study

McIntosh County

- Continue to promote the McIntosh County industrial park and construct necessary infrastructure for industry expansion

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- Airfield construction, including design and land acquisition, and associated facilities such as hangar and fuel farm development
- U.S. 17 McIntosh and Darien Corridor upgrades and access management studies
- I-95 interchange construction at King Swamp Road
- Pave King Swamp Road
- Widen GA 251 to four lanes from I-95 to King Swamp Road
- Rail line reactivation/rail bridge/spur: Tie Ports of Savannah and Brunswick by reactivating the abandoned CSX line from Richmond Hill - Riceboro - Everett

Screven County:

- Attract tenant to pad-ready site
- Complete GRAD certification for industrial park and construct infrastructure (rail, gas, etc.) that will help attract industry
- Transportation improvements such as the GA-21 bypass of Rincon and Springfield to make GA-21 65mph all the way to the Port of Savannah; 4-lane highway access to Augusta
- Upgrades to water and sewer systems
- Acquire a rail-served site and prepare it for development
- Assist existing industry with capital projects to facilitate expansion

5.2 Vital Projects

Vital projects will enhance the region's competitiveness. Potential funding sources include local governments, private investment, federal agencies such as EDA, USDA, and DOT as well as state contributions and programs including OneGeorgia EDGE and Equity as well as EIP. Vital projects include:

- Fully developed industrial parks on I-16 and I-95 (Bryan County)

- The Development Authority of Bulloch County owns approximately 200 acres at the Interstate 16/Highway 301 interchange, most likely to be the focus of industrial development. Bulloch County is working towards master planning of the larger interchange area. Anticipated needs for this project include infrastructure support for industry desiring to locate in the park, such as water and road

- Incubation/manufacturing lab space with Georgia Southern University. The Development Authority of Bulloch County has been in discussion with Georgia Southern University and other local partners to support the development of incubation space and/or fabrication lab space near the campus. Creation of these facilities will have a significant regional impact on manufacturing and small business recruitment and job creation

- Complete new full-service technical college, including site donation and infrastructure extension (Camden County)

- Complete Naval Submarine Base Kings Bay Joint Land Use Study (Camden County)

- I-16 ramp removal in Savannah (MLK Jr. Blvd and Montgomery St.) and I-16 widening from I-95 to I-516 (Chatham County)

- Port deepening in Savannah Harbor (Chatham County)

- Develop the Savannah region as a center for materials research and development and build on capabilities including SCAD's industrial design program and HERTY Advanced Materials Development Center

- Invest in warehousing and distribution facilities, as well as film production and digital media industry sectors (Chatham County)

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- Interstate 16 Logistics Center: Infrastructure development including water, wastewater treatment, and road work (Effingham County)

- Port expansion at Colonel's Island and other continued investment in Port of Brunswick facility improvements (Glynn County)

- Coastal Logistics Park at Tradewinds: phase I to include infrastructure and access road (estimated cost to EDA= $2 million with $16.4 million in private investment) (Glynn County)

- Turtle River Global Logistics Park: on-site infrastructure and access road; estimated cost of $2.5 million (Glynn County)

- Tradeport West infrastructure to include provision of road, water, sewer, drainage systems and rail improvements to service Tradeport West Business Center; estimated cost of $17 million (Liberty County)
- Continue to promote the McIntosh County industrial park and construct necessary infrastructure for industry expansion

- Transportation improvements such as the Hwy 301 widening north of Statesboro, the GA-21 bypass of Rincon and Springfield to make GA-21 65mph all the way to the Port of Savannah; 4-lane highway access to Augusta (Screven County)

- Assist existing industry with capital projects to facilitate expansion (Screven County)

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6 Plan of Action

This section identifies key actions that are needed in the coastal area to further economic development prosperity. The goals are the result of analysis and input from the CEDS Committee and respondents to the survey.

Key Actions:

- Advocate and promote the deepening of the Savannah Port as the key economic development project for the Coastal Region; facilitate opportunities to encourage growth at the ports in Savannah and Brunswick and the redevelopment of a port in Camden County;
- Identify and develop long-term plans to encourage growth and adequate infrastructure to ensure industries' ability to expand or locate in the Coastal Region;
- Stimulate economic growth with the development of incubators throughout the Coastal Region that will advance entrepreneurship and provide space for start-up manufacturing;
- Support and assist regional economic development entities to market the Coastal Region on a national and global basis;
- Identify and develop opportunities that will provide access to capital to facilitate and expedite economic growth in the Coastal Region;
- Collaborate and develop, where necessary, opportunities to provide workforce training programs to sustain a globally competitive workforce with current and appropriate skill sets; and
- Encourage intergovernmental cooperation between the local/county governments, economic development organizations, downtown development authorities, tourism agencies, chambers of commerce and the universities operating in the Coastal Region.

Key Goals:

- To support and advance the coastal Georgia region to attain sustainable, quality growth and a diverse economic region.

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- To support the guiding principles from the Regional Plan of Coastal Georgia and encourage jobs and investment that are created through the integrated balance of sustainable economic development initiatives.

Regional Activities:

- Encourage economic growth strategies and related comprehensive plans to include locational plans to identify and develop appropriate sites for manufacturing, distribution and placement of cluster-related firms;
- While recognizing the importance of the regional port infrastructure and acknowledging strengths of each, develop plans to identify locations best suited for various strategies based on the placement and development of inland ports;
- Work with local governments, Downtown Development authorities and economic development organizations to create incentives for downtown revitalization, job creation, and location of business and offices within downtown areas;
- Support economic development plans established by development authorities consistent with the regional economic development strategy;
- Assist with the location of distribution centers not identified in the regional plan;
- Plan for public infrastructure including affordable workforce housing;
- Assist in developing tourism-based activities consistent with the regional plan;
- Monitor regional tourism statistics and impacts;
- Develop long-term plans to deal with the needs of the influx of older people locating in the coastal Georgia area;
- Development and advancement of education/training opportunities for entry and incumbent workforce to ensure the region has the necessary skill set;
- Create specific plans to develop adequate infrastructure for growth;
- Conduct educational effort to lead implementation of key actions regarding workforce changes and development in response to business needs;
- Stimulate entrepreneurship and startup companies related to regional clusters and ancillary to port growth;
- Develop a transportation plan and transportation infrastructure funding (plan transportation in and out of the region, its counties, and cities); including specific plans to create adequate infrastructure for growth; transportation/corridor development, public transportation options;
- Encourage more intergovernmental cooperation between local governments and the CRC; and
- Develop a regional post-disaster business recovery/business continuity strategy plan.

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6.1 Integration with the Regional Plan of Coastal Georgia

The Regional Plan of Coastal Georgia developed and defined Guiding Principles for Economic Development in the coastal region. Guiding Principles identify those overarching values which form the foundation for implementing the shared regional vision. The Regional Plan defined strategies for two categories under economic development, Business & Industry and Tourism, which are outlined in the following sections:

6.1.1 Guiding Principles: Business and Industry

The Regional Plan defines a vision to develop and facilitate the implementation of successful strategies that leverage existing regional economic engines, regional resources, state and federal government guidance and create a quality of life to attract compatible and strategic business opportunities, high wage jobs and investment to Georgia's coastal communities. Our goal is that the entire region shares in jobs and investment created through an integrated balance of sustainable economic development initiatives.

Strategies

1. Promote strategic distributions of business and industry across the region consistent with natural, cultural, historic and industrial resource strategies and encourage partnerships and collaboration between economic development agencies
2. Investigate ways to share costs and benefits across jurisdictional lines for both regional marketing and project support
3. Incorporate community plans for the strategic use of land for manufacturing, distribution, etc., while recognizing and respecting natural resources and the unique differences between communities
4. Coordinate with the Georgia Ports Authority (GPA) to identify their needs and identify mechanisms for the economic development industry to strengthen the GPA and its presence in logistics, distribution, and workforce development
5. Leverage and incorporate the region's military installations (Fort Stewart Army Base, Hunter Army Airfield and Kings Bay Naval Base) and the Federal Law Enforcement Training Center to recruit economic development projects
6. Incorporate HERTY Advanced Materials Development Center's experience and position as a development center for the commercialization of materials and create incentives to retain a portion of pilot plant opportunities as new Georgia

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industries and to assist development authorities in increasing recruitment win rates

7. Promote the historic nature, natural beauty and successful past and present performance of Coastal Georgia as a location site for film and clean high-tech industry and as a recruitment tool for opportunities
8. Incorporate the Center of Innovation's (COI) statewide logistics plan into a regional strategy to assist in the recruitment of companies and leverage as support for industry.
9. Coordinate federal, State and local economic development funding programs and initiatives that affect the coast
10. Enhance workforce development by collaborating with business, industry, and planning of educational entities that provide necessary workforce skills.
11. Increase existing industry retention and expansion rates
12. Promote downtown revitalization efforts to enhance job creation and location of business and offices within downtown areas
13. Incorporate current and future needs for housing, infrastructure, and natural resource protection into economic development initiatives
14. Encourage international economic developments that support strategic industry sectors
15. Enhance economic development and tourism opportunities by increasing cross functional communication

6.1.2 Guiding Principles: Tourism

Economic development via tourism is closely tied to our coastal resources through our coastal waterways and the natural, historic, and cultural resources which drive the industry. Our vision is that tourism will be successful through integrated land use, water resource management, transportation, and infrastructure decisions which protect and promote our coastal resources.

Strategies

1. Promote balanced, cooperative and coordinated cultural and resource-based tourism

2. Promote traditional and emerging Coastal Georgia products such as Wild Georgia Shrimp, the paper industry and wood pellet production
3. Promote regional anti-litter campaigns
4. Promote and develop incentives to enhance and grow regional cultural tourism, eco-tourism and agri-tourism
5. Promote Southern Passages (US 17) as a scenic route and encourage designation as a National Heritage Corridor
6. Promote character and aesthetics at all interstate interchanges
7. Balance recreational uses of coastal resources with appropriate protection of the environment on which our economy and quality of life depends
8. Promote heritage tourism by enhancing access to natural, historic, and cultural core areas for recreation, public education, and tourist attractions as appropriate within the protection mission
9. Encourage local governments to actively pursue elimination of junkyards and other eyesores, especially along major thoroughfares and gateways
10. Coordinate the development of the Coastal Georgia Greenway, Rail Trail and scenic byways
11. Leverage Coastal Georgia's success as a destination for tourism as a template for regional growth

6.2 Integration with Georgia's Economic Development Priorities

The Georgia Department of Economic Development (GDEcD) concurs with this document. A memorandum stating concurrence is included in Section 8, Appendix II. Coastal Georgia RC's Comprehensive Economic Development Strategy will be shared with the State of Georgia GDEcD Regional Project Manager to further collaborative efforts. The CEDS committee made every effort to cooperate and integrate this CEDS with the State of Georgia's economic priorities.

6.2.1 "Entrepreneur – Friendly" Initiative

The GDEcD's Small Business Resources Division provides a community-based program that helps create an entrepreneur environment, building entrepreneur and small business

strategy into the community's overall economic development strategies[19]. The GDEcD will take a community through proven methods designed to establish an entrepreneur support program, help them better understand their existing entrepreneur environment and develop sustainable, effective local strategies.

6.2.2 Georgia Work Ready Initiative

Georgia Work Ready[20] was launched in August 2006 by Georgia Governor Sonny Perdue and the Georgia Chamber of Commerce to improve the job training and marketability of Georgia's workforce and drive future economic growth for the state. It is conducted through a partnership between the state government and state chamber of commerce, ensuring that companies can more reliably match the right people with the right jobs.

This workforce training initiative assesses the skills of Georgia's workers, determines valuable job training opportunities and assures companies that the state can provide a long-term, qualified labor supply. Through a voluntary workforce assessment system called Work Ready, the program measures the "real world" skills that employers believe are critical for job success today and for mastering the innovative technologies tomorrow's jobs will require. Participating individuals then receive a Work Ready Certificate that indicates their level of work readiness based on their performance.

The Georgia Work Ready initiative includes four key elements:

• **Work Ready Certificate**: Designed for individuals, it allows workers to take a job assessment and then become eligible to receive a certificate indicating their skill and knowledge levels to potential employers. The certificate guarantees that job seekers have the portable skills – reasoning, reading and basic math – to serve as a solid foundation for more customized training. Assessments are conducted through the state's Department of Technical and Adult Education

• **Work Ready job profiling**: Designed to help Georgia employers build the right workforces for their needs, Georgia Work Ready's job profiling program allows Georgia employers to profile required job tasks and skill levels to more easily match candidates to job opportunities. By comparing job profiles with individuals' certification levels, companies can make reliable decisions about hiring, training and program development.

• **Certified Work Ready Community**: This voluntary initiative enables communities to demonstrate that they have the talented workforce needed to fill current and future jobs. The certification also shows a community's commitment to education and to improving high school graduation rates, important factors for driving businesses to an area.

• **Work Ready Region**: Through this program, which builds on the Certified Work Ready Community designation, multiple counties can work together to develop regional talent pools aligned to a common, existing strategic industry. Work Ready Regions must

[19] Georgia Department of Economic Development *Entrepreneur-Friendly Initiative* http://www.georgia.org/business-resources/small-business-resources/small-business-development/Pages/EntrepreneurFriendlyInitiative.aspx

[20] Governor's Office of Workforce Development http://workforce.georgia.gov/

be able to demonstrate that they have met the following criteria: improved regional high school graduation rates; counties obtaining Certified Work Ready Community status; increasing the number of students in strategic industry majors in two- and four-year colleges; closing the skills and achievement gaps; successfully transitioning workers into higher skilled jobs; and training the existing workforce in high tech skills to improve productivity and competitiveness.

6.3 Tools for CEDS Implementation

Business Development Funds are various federal, state, and local financing programs which help provide business and industry with needed capital to make their projects happen. The following listing is not all inclusive but merely a listing of the most used or best known programs in the area. The Georgia Department of Community Affairs publishes an "Economic Development Financing Packet" which is an excellent inclusive listing of various financing resources[21].

Incentives vary from local initiatives to statewide initiatives. State incentives include:

1) A Job Tax Credit program was designed to encourage businesses to locate and to expand in the state by providing tax credits for certain businesses that create new jobs. The state is divided into four tiers based on demographic calculation of need and the more needy counties are provided a higher tax credit.

2) Opportunity/Enterprise Zones: In 1997, the General Assembly enacted the Enterprise Zone Employment Act, recognizing the need for revitalization in many areas of Georgia. The State Enterprise Zone program intends to improve geographic areas within cities and counties that are suffering from disinvestment, underdevelopment, and economic decline, encouraging private businesses to reinvest and rehabilitate these places.

   The Enterprise Zone area must meet at least three of the following five criteria:

   - Pervasive poverty established using Census data. Each block group must have at least a 20 percent poverty level.
   - Unemployment Rate (average for preceding year) at least 10 percent higher than State or significant job dislocation.
   - Underdevelopment evidenced by lack of building permits, licenses, land disturbance permits, etc. lower than development activity within the local body's jurisdiction.
   - General distress and adverse conditions (population decline, health and safety issues, etc.).

[21] Georgia Department of Community Affairs *Economic Development Financing Packet*

http://www.dca.state.ga.us/economic/TaxCredits/programs/downloads/EDFD.pdf

- General Blight evidenced by the inclusion of any portion of the nominated area in an urban redevelopment area.

The following are incentives to any potential developer:

- Property tax exemption -- OCGA §36-88-3(1)
- Abatement or reduction in occupation taxes, regulatory fees, building inspection fees, and other fees that would otherwise be imposed on qualifying business -- OCGA §36-88-9(a)

In 2004, the General Assembly passed, and the Governor signed legislation (HB 984) to create a program within the State's Job Tax Credit Program of "Opportunity Zone" tax credits. The Opportunity Zone Tax Credit Program authorizes the Georgia Department of Community Affairs to designate as a "less developed area" an area that is contained by two or more census block groups with 15 percent or greater poverty, within an enterprise zone, and where an urban redevelopment plan exists. Opportunity Zones are intended to encourage development and redevelopment in smaller geographic areas than are served by existing economic development programs. State resources are directed towards these "pockets of poverty" in a way that can be supplemented by federal programs that DCA administers.

Opportunity Zone Tax Credit Benefits:

- the maximum Job Tax Credit allowed under law
- use of Job Tax Credits against 100 percent of income tax liability and withholding
- expansion of the definition of "business enterprise" to include all businesses of any nature

3) Freeport Tax Exemption program allows counties/cities to offer manufacturers and distributors exemptions ranging between 20 and 100 percent on ad valorem taxes on raw material, goods in process and finished goods destined for out of state shipment. A County/City offering this tax exemption may have a competitive advantage in attracting a new business over a County that does not offer the tax incentive.

There are four primary sources of grant funds available for economic development: Georgia Department of Community Affairs, the OneGeorgia Authority, the Economic Development Administration, and the United States Department of Agriculture-Rural Development.

Employment Incentive Program (EIP) is a pool of Community Development Block Grant (CDBG) funds which have been set aside to provide the funds essential to allow a local economic development project to go forward. Often referred to as “gap financing”, the EIP funds are used as either a grant to local governments to provide essential public infrastructure or a grant to local governments who may then loan the funds to provide essential financing to the company. In either case the funding must be essential to make the project happen and job opportunities must be created for low- and moderate-income persons. In EIP projects where the company was made a loan

by the local government, the repayment of the loan, both principle and interest, may be retained by the local government as capitalization for the local revolving loan fund (RLF). The RLF may then fund future projects meeting the same criteria as the original source of funds.

OneGeorgia Equity Fund is a community and economic development tool providing financial assistance including grants and loans that promote the health, welfare, safety and economic security of the citizens of the state through the development and retention of employment opportunities and the enhancement of various infrastructures that accomplish that goal. Eligible recipients of grant and loan funds include general-purpose local governments (municipalities and counties), local government authorities and joint or multi-County development authorities in rural counties suffering from high poverty rates. Applications from Conditionally Eligible counties will be considered when proposed projects have regional impact and support. Equity funds may be used for a multitude of economic development activities provided they are designed to increase employment opportunities.

OneGeorgia EDGE Fund The Economic Development, Growth & Enterprise (EDGE) program is a specialized economic development tool that may be used to enhance Georgia's competitiveness in attracting significant economic development projects. EDGE should not be used when other state or federal programs could be used or when local funds are sufficient to accomplish economic development goals. Due to the specialized nature of the program and the limited resources available, potential applicants are encouraged to contact the OneGeorgia Authority. Generally, EDGE funds are targeted for competitive projects in rural counties suffering from high poverty. "Competitive project" generally describes a situation in which a business is considering no less than two communities as a site for relocation or expansion where at least one community is outside Georgia and at least one, but not more than one, is in Georgia.

Economic Development Administration (EDA) provides grant funds to help build or expand public facilities essential to industrial and commercial growth such as industrial parks. Over the past forty years EDA funds have been used in almost every County in the region. EDA also provides grants to designated economic development districts for planning and economic development technical assistance.

USDA, Rural Development The financial programs support such essential public facilities and services as water and sewer systems, housing, health clinics, emergency service facilities and electric and telephone service. The program promotes economic development by supporting loans to businesses through banks and community-managed lending pools. The program offers technical assistance and information to help agricultural and other cooperatives get started and improve the effectiveness of their member services, and the program provides technical assistance to help communities undertake community empowerment programs.

Rural Development achieves its mission by helping rural individuals, communities and businesses obtain the financial and technical assistance needed to address their diverse and unique needs. Rural Development works to make sure that rural citizens can participate fully in the global economy.

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Small Business Administration (SBA) offers programs which have been used in the coastal Georgia region, including the SBA 7a and SBA 504 loan programs. The SBA 7a program is a conventional bank loan with the SBA providing a guarantee to the local financial institutions. The SBA 504 provides direct financing for 40 percent of the fixed assets needed by the new or expanding business. The SBA takes a second lien position behind a conventional bank lender who provides 50 percent of the project financing. The business is only required to inject 10 percent of the project. The 90 percent long-term financing offered by this program has been very beneficial to the economic development of the region.

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7 Performance Measures

The semi-annual and annual reports of accomplishments act as the evaluation tools utilized by the local and regional CEDS committees. This document is maintained by the support staff of the CRC under the guidance of the regional CEDS committee and CRC Board of Directors. Performance measures could include:

- Economic Measures
  - Building permits
  - Reduction in unemployment rates
  - Population growth rate by county
  - Number of new businesses licenses
  - Number of new companies relocating/expanding to the region
  - Average weekly wage/per capita income/median household income/government transfer payments
  - Poverty level
  - Size of workforce

- Investment
  - Number and types of investments undertaken in the region
  - Dollar amount of new investment
  - Number of financially successful projects – project still in business after 3 or 5 years
  - Increase in industrial/commercial lending in the region

- Planning
  - Number of marketable acres zoned and available for industrial development
  - Development of new infrastructure to facilitate recruitment and expansion efforts
  - Increase in diversification/distribution of occupation/industry sectors

- Workforce
  - Increase the level of educational attainment
  - Development of new/expanded education and training programs to improve the quality of the local labor force and meet the emerging needs of employers
  - Number of jobs created and retained in the region

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While these measures may be tracked by the Regional Commission/Economic Development District and are potential measures for tracking economic growth and diversity, these measures will be refined as experience and time show relevance.

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8 Post-Disaster Business Continuity Recovery Strategy

No CEDS document would be complete without a component addressing the region's capacity and and/or state of readiness to operate a "Post-Disaster Business Continuity Recovery Strategy". Though each county has a professional, efficient and trained Emergency Management Agency (EMA), equipment to address pre-disaster circumstances, evacuation plans and phased re-entry plans that are holistic in nature, all accept and recognize the importance of the first-responder need to address the health and safety conditions as an aftermath of the disaster. Assurances need to be assessed, analyzed and structured prior to establishing an acceptable re-entry plan. In most cases the re-entry plan looks at the critical workforce to repair and clear the debris, essential government employees to enter and then the balance of the community once they have corridors cleared, utilities repaired and debris removed. However, in all cases it is important for industry to re-enter as quickly as possible and that a business continuity strategy be employed at two levels. First it must be incorporated into the CEDS document and secondly into the post-disaster plan of the EMA so that production and services can start as soon as possible to minimize the loss of downtime. Not to imply that the EMA are not cognizant of the importance of getting business running again, but with a business continuity strategy in place then a business will be better equipped to assist the EMA personnel and make a quicker, more educated decision relative to restarting operations.

The Coastal Regional Commission and its ten counties are susceptible to hazardous climate conditions such as hurricanes, storm surges, flooding and wildfires. The region contains approximately 500 operating businesses with over 390 within the coastal counties. These businesses employ over 281,000 residents with an average weekly payroll of $158,922,000. The regional economy is dependent upon these employees getting back to work as quickly and efficiently as possible. A post-disaster business recovery/continuity strategy will address that need.

Each county within the service area of the Coastal Regional Commission has a Disaster Evacuation/Re-Entry Plan as part of the overall operation of the county EMA. Additionally these EMAs meet on a regular basis to coordinate training needs, address best practice scenarios, review current technologies and coordinate the strategies of support/backup services. In all cases each county has extensive plans in place relative to protocols, policy and procedures, alert systems, evacuation plans, recovery plans and then the re-entry approach. These Local Emergency Planning Committees (LEPC) and the associated response/strike teams would be the appropriate body to solicit to begin the development of a post-disaster business continuity strategic plan. Similar to the application of a CEDS committee the initial construction of a business continuity strategy would structure an advisory committee comprised of the LEPC which would draft a strategy/plan to be deployed to the business community for implementation and incorporated as an integral component of the CEDS document.

An initial approach to the design of a business continuity strategy would incorporate the proposed action steps:

1) Formation of advisory committee
    - EMA/LEPC
    - Business representatives
    - Utility representatives
2) Design of a business continuity strategy
    - Establish parameters
    - Data collection
    - Communications
    - Training requirements
3) Identification of parameters to assess
    - Business identification (type & location)
    - Commuting patterns and dominant routes
    - Critical worker skill sets
    - Utilities network
    - Raw materials (hazardous)
    - Staging areas, temporary operation locations
    - Disposal sites/capacity
    - Maps, photo, inventory documentation
    - Contractors, material suppliers
    - Back-up, reciprocal partners
    - Measurements for damage assessment
    - Recovery assistance
    - Routes, schedules of product

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9 Appendices

9.1 Appendix I: Reference Documents

The following documents were reviewed during the development of this Comprehensive Economic Development Strategy. In addition to this list, local comprehensive plans were reviewed for additional data and recommendations.

Annual Report Fiscal Year 2011. Georgia Department of Economic Development, 2012.

Brunswick Blueprint II Final Report. May, 2008.

Bryan County Economic Diversification: An Update and Reassessment. University of Illinois at Chicago, 2011.

Camden County Economic Diversification Study. Georgia Tech's Office of Economic Development and Technology Ventures, October 2005

Capitalizing and Acting on Emerging Economic Opportunities in the Savannah Region. SRI International, October 2011.

Comprehensive Local WIA Plan Update. Coastal Workforce Services, 2011.

Creating Excellence in International Business Development Initiatives. Savannah Development Authority, May 2004.

Economic Development Finance Programs. Georgia Department of Community Affairs, August 2010.

Economic Diversification of Bryan County, Georgia. Georgia Tech Enterprise Innovation Institute, 2007.

Fort Stewart/HAAF Regional Growth Plan. Fort Stewart Growth Management Partnership, 2010.

Georgia Competitiveness Initiative Report. Georgia Department of Economic Development, January 2012.

Long County Economic Diversification. University of Illinois at Chicago, 2011.

Regional Plan of Coastal Georgia. Coastal Regional Commission, 2010.

St. Marys Economic Development Strategy. Summer 2007.

Strategic Plan. Coastal Workforce Services, April 2005.

Strategy Evaluation and Update: Liberty County Economic Diversification. University of Illinois at Chicago, 2010.

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9.2 Appendix II: Georgia Department of Economic Development Concurrence

Georgia®
USA

July 10, 2012

TO: Georgia's Regional Commission Executive Directors

FROM: Gretchen Corbin, Deputy Commissioner Gretchen Corbin

SUBJECT: Economic Development Priorities in Georgia

It is our pleasure to assist your Regional Commission as you complete your Comprehensive Economic Development Strategy for the Economic Development Administration under the U.S. Department of Commerce. Continued funding from EDA is critical to our economic development efforts and projects in Georgia.

Georgia is home to world-renowned research centers, top ranked universities and Fortune 500 companies. Georgia combines a talented workforce and high quality of living with abundant resources and a thriving economy to create a fertile environment for economic development. The Georgia Department of Economic Development helps drive Georgia's economic growth.

The Georgia Department of Economic Development (GDEcD) is the state's sales and marketing arm, the lead agency for attracting new business investment, encouraging the expansion of existing industry and small businesses, locating new markets for Georgia products, attracting tourists to Georgia, and promoting the state as a location for film, video and music projects, as well as planning and mobilizing state resources for economic development. GDEcD is a global agency and one-stop-shop for accessing Georgia's assets and finding the right components for success. We accomplish these goals through the combined efforts of our Global Commerce Team, Tourism Team, Film, Video & Music Team and our Marketing & Communications Team.

Activities identified in the CEDS that do not conflict with the goals stated above would be deemed consistent with the efforts of GDEcD. Efforts by your RC, coupled with the efforts of all other entities involved in creating lasting jobs and investment within our state are essential to ensure the continued economic vitality within the state of Georgia.

Should you have any questions, please feel free to call me at 404-962-4029.

Georgia Department of Economic Development • 75 Fifth Street, NW • Suite 1200 • Atlanta, Georgia 30308

9.3 Appendix III: Coastal Regional Commission Council Members as of August 2012

NAME	RACE	SEX	POSITION	APPOINTMENT DATE	EXPIRATION DATE
Chairman Jimmy Burnsed (E)	White	Male	County	July 09	
Mayor Harold Fowler (E)	White	Male	City Richmond Hill	January 10	
Sean Register ■	White	Male	NP, Dev. Auth.	July 12	July 2013
Comm. Walter Gibson (E)	White	Male	County	July 09	
Mayor Joe Brannen (E)	White	Male	City Statesboro	October 10	
Russell Keen ■	White	Male	NP, Secondary Ed.	July 12	July 2013
Chairman David Rainer(E)	White	Male	County	July 09	
Mayor Bill Deloughy (E)	White	Male	City St. Marys	January 10	
Craig Root ■	White	Male	Non-Public	July 12	July 2013
Chairman Pete Liakakis (E)	White	Male	County	July 09	
Mayor Edna Jackson (E)	Min.	Female	City of Savannah	January 12	
Chris Blaine ■	White	Male	Non-Public	July 12	July 2013
Vacant			Non-Public		
Vacant			Non-Public		
Comm. Reggie Loper (E)	White	Male	County	September 10	
Mayor Ken Lee (E)	White	Male	City Rincon	July 09	
Herb Jones ■	White	Male	NP, Chamber/Dev.	July 12	July 2013
Chairman Richard Strickland (E)	White	Male	County	January 12	
Comm. Julie Martin (E)	White	Female	City Brunswick	January 12	

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NAME	RACE	SEX	POSITION	APPOINTMENT DATE	EXPIRATION DATE
David Boland ■	White	Male	Non-Public	July 12	July 2013
Shaw McVeigh ■	White	Male	Non-Public	July 12	July 2013
Chairman John McIver (E)	Min.	Male	County	July 09	
Mayor Jim Thomas (E)	Min.	Male	City Hinesville	July 09	
Allen Brown ■	White	Male	NP, Chamber/Dev	July 12	July 2013
Matthew Barrow ■	White	Male	NP, Workforce Dev.	July 12	July 2013
Chairman Robert Walker(E)	White	Male	County	July 09	
William Miller ■	Min.	Male	NP, Workforce Dev.	July 12	July 2013
Gwendolyn Davis (E)	Min.	Female	City Ludowici	Jan. 12	
Joe Malbasa (E)	White	Male	City Darien	October 10	
Jason Coley ■	White	Male	Non-Public, Chamber/Dev	July 12	July 2013
Chairman Kelly Spratt (E)	White	Female	County	July 11	
Chairman Will Boyd (E)	White	Male	County	January 10	
Mayor Margaret Evans (E)	White	Female	City of Sylvania	July 09	
Herb Hill ■	White	Male	Non-Public	July 12	July 2013
Dan Coty ♦	White	Male	State Non-Public	July 11	July 2013
Chap Bennett ♦	White	Male	State Non-Public	July 09	July 2011

Tom Ratcliffe ♦	White	Male	State Non-Public	August 09	August 2011
Vacant ♦			State Secondary Education		
Linda Barker ♦	White	Female	State Non Public	March 10	July 2011

(E) = Elected Officials **■ = Non-Public** **♦=State Non-Public**

*State Appointment notes – no action has been taken on three of the appointments; therefore, they remain on the Council until reappointed or a new appointment is made.

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