



Southwestern NC Economic Development District

- A Comprehensive Economic Development Strategy (CEDS)

**Southwestern NC Economic
Development District**

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It is becoming increasingly critical that a region promote its competitive advantages to its state and federal government to ensure the development of sound state and national strategies. This in turn ensures that a region with unique assets can compete in the global economy.

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Background

History

When the Public Works and Economic Development Act of 1965 (PWEDA) became law four decades ago, Southwestern North Carolina was, quite literally, a District that would now be considered third world. All seven counties of the EDD were initially designated RA (Redevelopment Areas) by EDA because of very low personal incomes, high unemployment and high out-migration rates. The Appalachian Redevelopment Act (also of 1965) similarly defined all seven counties as “distressed,” with four of the seven being “severely distressed.”

The written record of the District’s early history (1965-1975) indicates that local elected officials, community leaders and private sector representatives were united in their responses to the opportunities provided by PWEDA. Between 1965 and 1975 each of the seven counties produced an annually updated an OEDP (Overall Economic Development Program) which was a prerequisite to any EDA investments. During this decade most of the District’s jurisdictions received EDA grants. In 1975 all seven counties came together to create the Southwestern NC Economic Development District, concurrently forming a regional OEDP Committee and developing a District OEDP. Between 1975 and 2000 each of the seven county governments, together with the District’s municipal officials, community leaders and private sector representatives worked with staff to keep the OEDP current, dynamic and valid. During this entire period the District maintained 100% participation of its member governments, including full payment of membership dues.

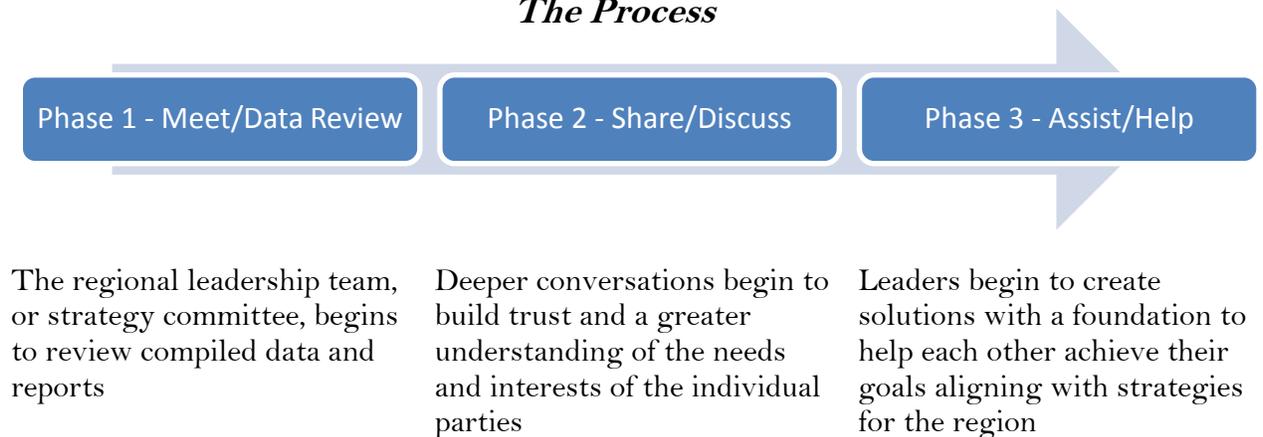
In 2000, the EDD developed its first CEDS (Comprehensive Economic Development Strategy) in response to amendments to PWEDA which, among other changes, required a transition from the OEDP to the CEDS. Stakeholders within the EDD responded positively to CEDS. The requisite CEDS Committee structure has been maintained and participation has been commendable during each annual update process.

Why a Regional Strategy?

Historically, public and private investment has been a key component for economic development; it is now a fundamental imperative in order to ensure a region remains competitive in today’s global economy. The focus of these investments has shifted during the past half century from *The Era of Industrial Recruiting – Focused on financially incentivized infrastructure investments to attract factories*; *The Era of Cost Competition – With roots in the 80’s, as globalization of production operations created a necessity to further deepen and incentivize*; and our current *Era of Regional Competitiveness – beginning in the late 90’s, with an emphasis of identifying a region’s competitive advantages, then prioritizing public/private investments to exploit those advantages.* (Drabenstott 2005) This new paradigm shift in the way local development organizations conduct development strategies presents many challenges, primarily the need to dissolve

jurisdictional boundaries for a truly regional collaborative, willing to prioritize and guide investments. It is becoming increasingly critical that a region promote its competitive advantages to its state and federal government to ensure the development of sound state and national strategies. This in turn ensures that a region with unique assets can compete in the global economy. The EDA sites two common traps that regional leaders often fall victim to: fragmentation and insularity. Fragmentation occurs when regional leaders lose site of the strategy in favor of pursuing their own localized agenda or individual project. Insularity occurs when leaders revert to traditional “incentive shopping” without understanding global competition.

The Process



Strategy Committee

Josh Carpenter, Director, Cherokee County
Economic Development Commission

Mark Clasby, Director, Haywood County
Economic Development Commission

Terry Martin, General Manager, Moog
Components Division

Bill Yarborough, Regional Agronomist, NC
Dept. of Ag. & Consumer Services

Mike Stephenson, CEO, Murphy Medical
Center

Dale West, Manager, NC Commerce,
Division of Workforce Solutions

Brian Trout, Director, Clay County
Economic Development Commission

George Marshall, President and CEO,
Haywood Vocational Opportunities

Greg Cable, County Manager, Graham
County

Fred Alexander, District Manager, Duke
Energy

Gene Farley, Owner, Farley Insurance

Jack Debnam, Owner, Western Carolina
Properties/ Jackson County
Commissioner

Randy Everhart, Human Resources
Executive, Stanley Furniture Company

Gerald Green, Planning Director, Jackson County

Don Tomas, President, Southwestern Community College

Vickey Wade, Program Director, WCU-Local Government Training Program

Tommy Jenkins, Director, Macon County Economic Development Commission

Ronnie Beale, Owner, Beale Construction/Macon County Commissioner

Mike Chapman, Software Program Designer, Drake Software

Jason Lambert, Director of Commerce, Eastern Band of Cherokee Indians

Jeremiah Wiggins, Director of Planning and Analysis, Harrah's Casino

Nell Leatherwood, Executive Director, Sequoyah Fund

Matt Raker, VP of Entrepreneurship and Advantage Green, Advantage West

Lauren Stull, District Ranger, US Forest Service

Joel Setzer, Division Engineer, NCDOT Division 14

Ken Mills, Director, Swain County Economic Development Commission

Sutton Bacon, CEO, Nantahala Outdoor Center

Joe Collins, Region A Board Chairman, Southwestern Commission

Paul Carlson, Executive Director, Land Trust for the Little Tennessee

The EDD's advisory committee created the following overarching goals in 2012 based on discussions facilitated by the Southwestern Commission with input from regional economic development professionals.

Goal 1: Promote the orderly expansion and upgrade of housing and other support facilities to accommodate the region's expanding economic needs

Goal 2: Provide a comprehensive package of business development resources to the region's established and emerging businesses

Goal 3: Expand the region's capacity to inventory and market vacant sites and buildings for economic development

Goal 4: Create, maintain and expand data and information collection capacity for regional analysis and investment performance evaluation

Goal 5: Evaluate and enhance the agricultural economy while promoting prime farmland soil protection strategies

Goal 6: Foster, facilitate and promote coordinated regional economic and workforce development initiatives

Goal 7: Attract and incentivize new businesses and industries to the region to expand the economy

Goal 8: Align educational offerings and workforce development programs with the evolving needs of the marketplace focused on existing, emerging and expanding businesses

Goal 9: Expand 21st Century telecommunications infrastructure throughout the region enabling the Region to connect to the global economy

Goal 10: Maintain and upgrade the Region's multimodal transportation network with a focus on resolving our east/west transportation corridor challenge coupled with safety improvements

Goal 11: Support grassroots community driven initiatives to improve and revitalize our town centers to stimulate economic activity

Goal 12: Create a framework for the redevelopment of underutilized mills and other current vacant manufacturing sites

Goal 13: Develop a framework and an evaluation methodology for the prioritization of future regional investments

Economic Background

Beginning with the industrial revolution and continuing through the 1950's, economic development in western North Carolina was based on natural resources; timber, agriculture, mining, pulp, and paper. In the 1950's the District's economic growth shifted to low-wage, low-skill factory operations. Cut-and-sew textiles and furniture became dominant industries. In addition, electronic products assembly gained a respectable percentage of the District's gross product.

The middle of the last century also brought the first wave of middle class tourists, from which grew destination tourism facilities such as Ghost Town theme park, multiple gem mining businesses, and American Indian attractions on the Cherokee Reservation. The end of the last century saw growth in tourism businesses related to outdoor recreation and local heritage. Examples of this type of tourism include whitewater sports, hiking, mountain biking, and professional craft businesses. That era also saw a growth in high-end cast and machined metal products (e.g. shop tool and transmission gears).

This new century has ushered in more changes. Harrah's Casino in Cherokee is now the top entertainment draw in NC, and has created more than 2,000 new jobs. The Casino's \$633 Million expansion opened a 3,000 seat music venue and several national high-end chain restaurants. Other amenities at the Casino include a 18,000 square foot Spa and a refurbished casino floor with 4,500 to 5,000 slot machines. Travel and tourism are the major drivers in the growth of the retail/service sectors in the District, as well as the state. With nearly 37 million

domestic visitors in 2010, North Carolina ranked as the sixth most visited state in the U.S. Those visitors spent more than \$17 billion, contributed more than \$1.5 billion in new state and local tax revenues, supported more than 40,000 NC businesses and fueled 185,500 jobs for North Carolinians. Research also found the NC Division of Tourism's advertising investment provided a return of nearly \$17 in new state and local taxes for every dollar invested in paid media. Economic impact highlights are featured here with representative marketing successes from travel industry partners across North Carolina.

The Blue Ridge Parkway, Harrah's Casino, and the Great Smoky Mountain National Park traditionally rank among the top tourist destinations in North Carolina. The Great Smoky Mountains National Park attracted over 9 million visitors annually over the past six years, the highest visitation of any of the 58 national parks in the US. According to the National Park Service, the park has a \$718 million economic impact per year for surrounding communities.

Aside from concerns regarding social impacts and possible transfer of tourism dollars, the most worrisome component of a tourism based economy is that a retail and service based economy generally means low wages and seasonal employment. The Casino is one of the few tourist industries to offer year round employment. The average weekly tourism related job in the District pays just over \$16,000/year, significantly lower than manufacturing wages. With the shrinking number of manufacturing jobs and an increasing number of service industry jobs, the average weekly wage is falling.

The pulp and paper industry remains viable but fragile in western North Carolina. In Haywood County, a former Champion International mill that was purchased 18 years ago by its employees was sold in August 2007 to New Zealand-based Rank Group. With the new name "Evergreen Packaging Group" and approximately 1,200 employees at two Haywood County mills, this mill was, until recently, the largest employee-owned paper mill in the world.

Technical knowledge-based jobs are witnessing the highest growth rate of any sector, outside of tourism. Drake Enterprises has over 600 employees in Macon, Jackson, and Clay Counties, and pioneered electronic tax filing software in the 1990s, and still provides the nation's leading electronic tax filing service. In a partnership between the Eastern Band of Cherokee Indians and Drake Enterprises, over \$14 million has been invested toward creating a 300+-mile fiber optic ring in the District. BalsamWest FiberNet LLC provides broadband connectivity at urban prices and capacity. Drake has expanded within the region by adding a telephone call center in Clay County, creating 25 new jobs, to complement its other customer service call centers in Franklin and Sylva. The BalsamWest fiber optic internet ring allows seamless service and coordination among the three call centers. Coupled with several public sector investments obtained by the District's congressional representative and grants from private foundations, the District is poised to become a location for additional software and knowledge-based employers.

In the District's far west, a cluster of metal machining industries employs over 700 people, and has created a common training complex in conjunction with Tri-County Community College. A new \$1 Billion Volkswagen manufacturing plant began operations in Chattanooga, TN in 2011.

The plant is expected to utilize manufacturing plants in the far western part of the region as sub-contractors.

Green infrastructure such as greenways, working farms and forests, and wild and scenic waterways, is now an element of all local and regional economic development strategies. Efforts to preserve watersheds and environmentally sensitive areas are rapidly gaining popular support. Local food and buy local movements continue to enhance and support the existing agricultural sector.

The second home real estate market that remained immune to recessions and economic dips for the past 25 years suffered a dramatic slowdown in 2008 and 2009, but is now beginning to grow again, slowly. The recession may have had a positive effect; during the slowdown period, counties and municipalities were able to plan for better management of development. For example, several counties in western North Carolina have adopted steep slope and/or subdivision ordinances.

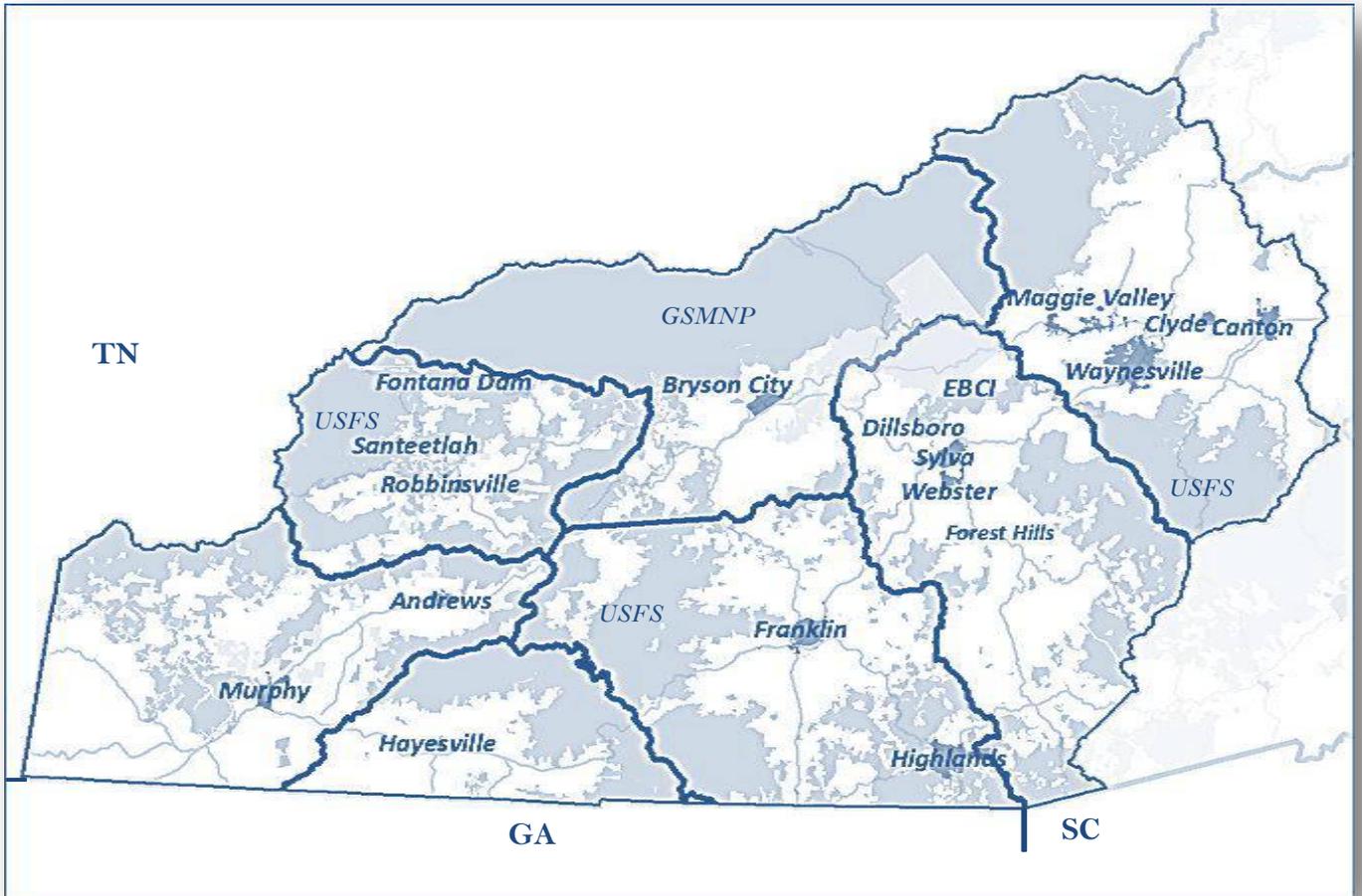
There is growing support for managed growth in the area. Although the area has a history of opposition to zoning and planning, the pre-recession unprecedented growth in second home construction, RV and mobile home communities, and small-lot housing developments generated concern. Among the primary issues are ridge top construction, construction on steep slopes with landslide potential, water resource protection, and erosion control. Communities in the District now question the benefits of a rapidly growing second home construction industry without adequate planning. Historically, little planning has been done prior to rapid construction of pre-fabricated buildings. This type of commercial structure has little architectural appeal along business corridors.

The Institute for the Economy and the Future at Western Carolina University conducted a study in 2006 to determine the economic and environmental effects of the second home construction industry in Haywood County. The perception was that this segment of the construction industry is the primary economic driver in several counties. The study indicated that the construction industry was one of the largest employer groups in the region, but primarily benefited developers and real estate professionals. The industry did not provide career employment for a large number of people, and supplies few employee benefits such as insurance or retirement assistance.

A workshop for regional leaders was hosted in 2007 by the EDD and Western Carolina University, where issues regarding steep slope development, adequate soil evaluation for construction, wells, septic systems, residential water safety and water availability were discussed. The two priorities of the attendees were development on unstable slopes and the protection of rivers and streams. The Mountain Landscapes Initiative was developed as a result of this workshop. The Initiative was used to develop a “toolbox” of best practices and strategies for local governments to use in managing growth, educating the public and developing ordinances and regulations. This innovative project received a Trailblazer Award from the National Association of Development Organizations in 2010. The implementation of

best practices now has funding available in the form of mini-grants, being administered by the EDD.

Regional Profile



Geography

The Southwestern Commission, also known as Region A, is a local development district comprised of seven counties (Cherokee, Clay, Graham, Haywood, Jackson, Macon, and Swain) in the westernmost portion of North Carolina. The region is mostly rural and forested, with a total land area of 3,098 square miles. More than 70% of the region is public land, which is substantial, compared to other areas in the eastern US. This public land includes two National Parks (The Great Smokies and the Blue Ridge Parkway), two National Forests (Nantahala and Pisgah), four TVA lakes (Appalachia, Chatuge, Fontana, and Hiwassee) and the Eastern Band of Cherokee Indians.

The Blue Ridge Mountain Range on the east and the Unaka Mountains on the west form the north-south boundaries of the Southern Highlands with various ranges, including Balsam, Snowbird, Nantahala, and Cowee ranges forming the cross bars. Between these transverse ranges are valleys of varying length and width, each with its own river system. The more mature valleys have fairly broad floors and gently rolling to hilly slopes. The gently sloping river plains have supported the majority of the District's population in the past, and they can be expected to do so in the future. Although all but the most severe of topographic limitations can be overcome, the expense of overcoming them can be prohibitive. The problems of development on slopes in excess of 30% limit any major construction. Approximately 66% of the District's land (both public and private) have slopes over 30%.

Region A is located within in the geographic center of an immensely growing region. New York, Chicago, Tampa, New Orleans, the Mississippi River, the Great Lakes, and the Gulf of Mexico are all within 500 miles. The EDD is also within a day's drive of 75% the nation's population.

Population

In 2010, approximately 195,000 people, or 2% of North Carolina's total population resided within the 7-county region. The EDD's population experienced a growth of 13.8%. Jackson County led the way with a 21.6% increase, followed by Clay County's 20.6% growth rate. The table below shows the actual growth rates of each county in the EDD using the 2000 and 2010 Census Data.

Cherokee	Clay	Graham	Haywood	Jackson	Macon	Swain	Region A	NC
12.9	20.6	10.9	9.3	21.6	13.8	7.8	13.8	18.5

According to the NC Demographer, the EDD has a 2012 estimated population of 198,028. 85% of the region is rural, compared with 45% of the state population. The region's density is roughly 64 people per square mile. Because the EDD is mostly restricted public land, the adjusted population density for the region is 216 people per square mile; much higher than the statewide population density.

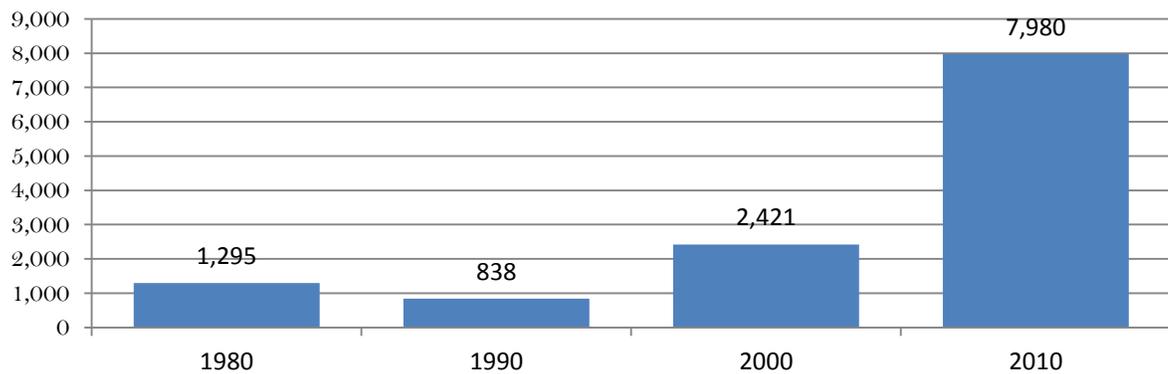
51% of the region is female. The median age varies by county. Three counties rank in the top 10 "grayest" counties in the state. Clay (50.43) tops the list, followed by Cherokee (49.04) at fifth, and Macon (48.56) at tenth. With a median age of 37,

Ethnic Breakdown, 2012		
	Region A	%
White	181,209	91.5
American Indian	9,601	4.8
Black	2,432	1.2
Asian	1,267	0.6
Other/Two or More Races	3,519	1.8
Source: NC OSBM		
AGE	Region A	%
0-17	37,410	18.8
18-24	19,379	9.7
25-44	42,936	21.7
45-64	57,135	28.8
65+	45,965	23.2
Source: NC OSBM		

only Jackson County has a lower median age than the state’s median age of 38. Over 23% of the region’s population is over the age of 65. Over 91% of Region A reported themselves as white in the 2010 Census. Native Americans, who represent 4.6% of the population, are the largest minority group. African Americans, who are in decline in the region, represent 1.2% of the population. Roughly 0.6% of the region reported themselves as Asians. Multi-racial residents comprised the remaining 1.8% of the population.

Hispanics, which constitute 4% of the population, have increased by almost 230 percent from 2000 to 2010; mainly due to the rise of service and labor intensive industries.

Hispanic Population Growth, 1980-2010



The table below shows the region’s historic population from 1950 to 2010, as well as the projected population increase up to 2030. Analysis shows that after a slight decrease in population from 1950 to 1960, the region has experienced steady growth over the past half century. In Region A, more people die every year, than there are babies born, causing a negative rate of natural increase. Much of the population increase is due to the migration of retirees, college students, and Hispanics to the area.

HISTORIC POPULATIONS & PROJECTIONS: 1950-2030									
CENSUS	CHEROKEE	CLAY	GRAHAM	HAYWOOD	JACKSON	MACON	SWAIN	TOTAL	%±
1950	18,294	6,006	6,886	37,631	19,261	16,174	9,921	114,173	---
1960	16,335	5,526	6,432	39,711	17,780	14,935	11,268	109,106	-4.43%
1970	16,330	5,180	6,562	41,710	21,593	15,788	10,283	115,024	5.42%
1980	18,933	6,619	7,217	46,495	25,811	20,178	7,861	135,536	17.8%
1990	20,170	7,155	7,196	46,942	26,846	23,499	8,387	143,076	5.56%
2000	24,298	8,775	7,993	54,033	33,121	29,811	12,968	170,999	19.5%
2010	27,444	10,587	8,861	59,036	40,271	33,922	13,981	194,102	13.5%
2020	30,989	12,172	10,053	64,243	46,915	35,045	15,584	215,001	
2030	34,379	13,718	11,219	69,337	53,347	36,145	17,147	235,292	

Source: US Census 1950-2010, NC OSBM

Income and Poverty

The all-persons poverty rate across the EDD is slightly lower than the state average. However, the percentage of children living in poverty in the region dwarfs that of the state and nation. The median household income of region continues to lag behind the state and nation. The table below shows the poverty rate and median household income for each county. According to the US Census socioeconomic data, 17.2% of the EDD live in poverty. At 22%, Graham County has the highest rate of poverty in the region. 31% of the children in Region A live in poverty.

POVERTY RATES & MEDIAN HOUSHOLD INCOME				
Region A North Carolina United States	Poverty Rate		Median Household Income	
	All Persons	Under 18		
		17.2%	31.34%	\$35,601
		17.4%	24.6%	\$43,417
	15.3%	21.6%	\$50,046	

Education

EDUCATIONAL ATTAINMENT

	No Diploma	High School Graduate	Some College	2-yr degree	4-year degree or higher
Cherokee	18.5%	32.1%	22.9%	10.7%	15.9%
Clay	17.0%	33.7%	22.8%	7.8%	18.6%
Graham	20.6%	34.6%	23.1%	8.6%	13.0%
Haywood	15.9%	31.3%	21.5%	10.8%	20.6%
Jackson	18.6%	27.3%	18.9%	8.2%	27.0%
Macon	17.0%	31.8%	22.9%	8.8%	19.5%
Swain	20.6%	32.9%	17.6%	10.3%	18.6%
North Carolina	16.4%	28.2%	20.9%	8.3%	26.1%
United States	14.9%	29.0%	20.6%	29.0%	14.9%

K-12

North Carolina has a centrally controlled public education system, with the state bearing most of the operations costs of schools. Local boards are charged with providing capital facilities, most maintenance and utilities, and operating supplements to enhance local education. In the realm of local government expenditures for public schools, the district remains well behind the state average.

HIGHER EDUCATION

There are roughly 28,000 students enrolled in institutions of higher education throughout the district. Over two-thirds of students are enrolled in one of the region's three community colleges. Haywood Community College, Southwestern Community College and Tri-County Community College offer Associate, Vocational and Continuing Education programs and coordinate efforts with the local Workforce Development Board to meet the needs of the workforce.

In 2009, 19% of high school graduates from the district enrolled as freshmen in the UNC System; compared to 35% of all NC high school graduates in 2009.

Additionally, Western Carolina University is a 4-year state university located in physical heart of Region A. The university offers graduate, post graduate and graduate certificate programs. It also brings cultural opportunities to Region A through theater, music and events which are open to the public.

CHALLENGES

The Southwestern Workforce Development Consortium, a division of the EDD, has been working with local community colleges and school boards to improve the soft skills and work ethics of the workforce and to reduce the dropout rate and foster GED achievement.

Tri-County Community College is in partnership with area manufacturers to train machinists for three local companies. Haywood Community College has one of the few programs in the country that provide training in crafts production and entrepreneurial skills for marketing these products.

In 2010 the EDD received a grant of \$300,000 from the Appalachian Regional Commission matched by \$494,000 in local funding to assist the three community colleges in the region in developing "green workforce" training programs.

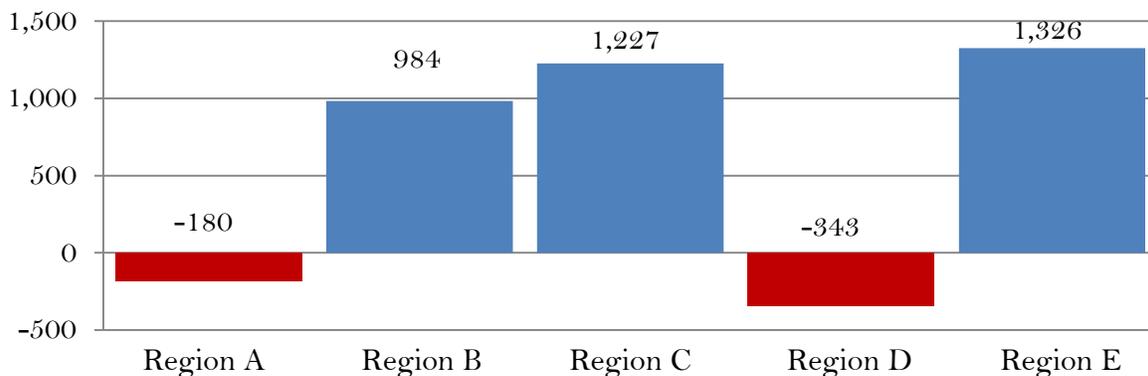
Workforce

A multi-regional workforce development summit was held on April 8, 2007 in Asheville with more than three hundred people in attendance and 11 counties represented. The summit was created by a partnership of the Southwestern Workforce Development Board (totally within the EDD), the Mountain Area Workforce Development Board, AdvantageWest, the Asheville Chamber of Commerce and partners in education. Sponsors included AT&T, Mission Hospitals, Progress Energy, and Western Carolina Industries. The three areas of focus were: Healthcare, Hospitality and Tourism, and Advanced Manufacturing. Top priorities for the eleven-county region were identified as follows:

- Career education for K-12 students
- Attracting an aging workforce
- Cost of Living – Housing, energy, childcare, transportation, health & wellness
- Public Relations
- Soft Skills and Life Skill

In August 2012, Southwestern Community College was awarded a grant of \$397,519 for the North Carolina Back-to-Work Program, a retraining program to prepare North Carolinians facing long-term unemployment for new careers. The program will provide students with job training and retraining; employability skills, including a Career Readiness Certificate; and third-party, industry-recognized credentials. The funds were allocated based on (i) the number of long-term unemployed individuals in the college's service area, (ii) the percentage of long-term unemployed individuals in the college's service area, (iii) the availability of jobs for which the North Carolina Back-to-Work Program could prepare students, and (iv) the college's demonstrated willingness and ability to successfully implement the program. The money may only be used for the following activities: student instruction, student support and coaching, and targeted financial assistance for students, including assistance with tuition, registration fees, books, and certification costs.

Annual Jobs Gained/Lost 2010-2011 - NC Regional Councils



ESTABLISHMENT BASED EMPLOYMENT (IN THOUSANDS)

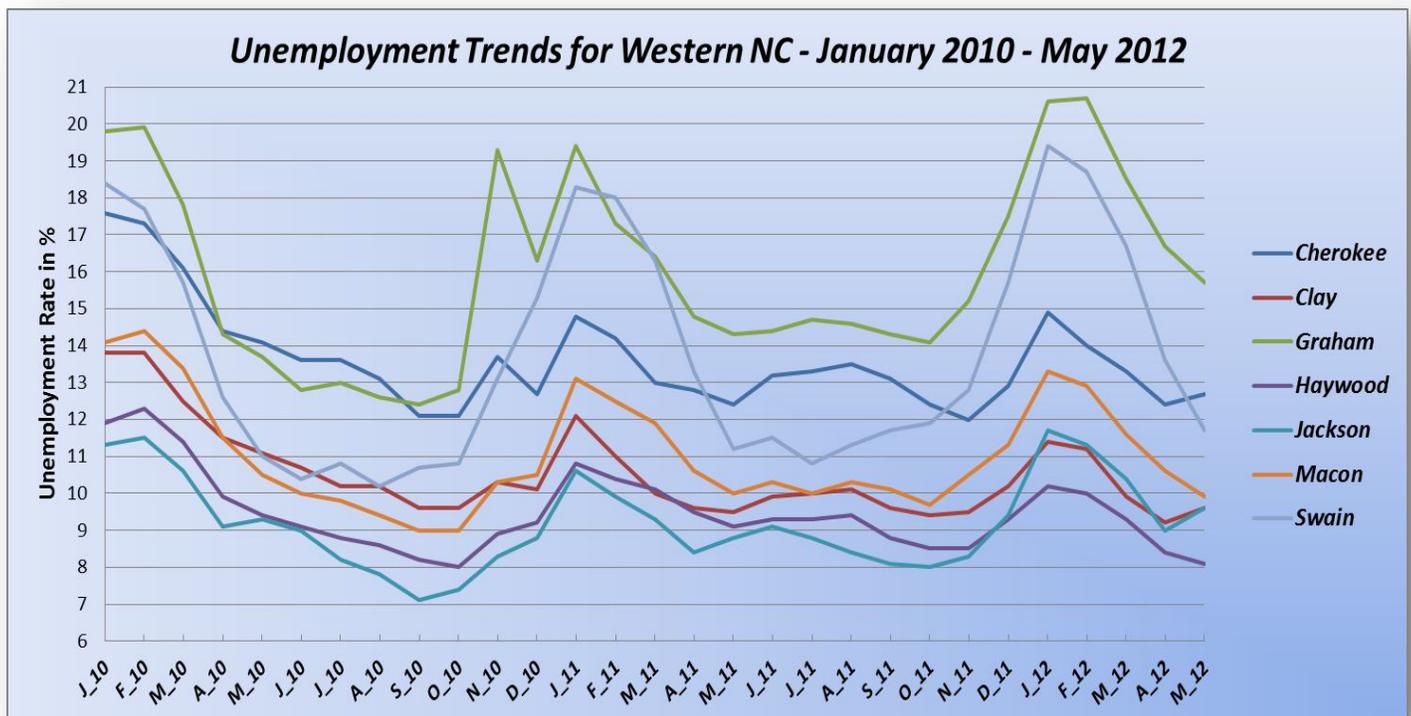
	2010	2011
North Carolina	3.788	3.863
Region A	59.0	58.8

While North Carolina gained 48,367 jobs between 2010 and 2011, Region A lost 180 jobs.

REGION A EMPLOYMENT BY MAJOR SECTORS

	2010	%	2011	%	Jobs Gain/Loss
Construction					
Manufacturing	3.6	6.1	3.2	5.5	-400
Retail Trade	4.7	7.9	4.8	8.2	100
Educational Services	8.4	14.3	8.5	14.4	100
Health Care and Social Assistance	6.9	11.7	6.9	11.8	0
Arts, Entertainment, and Recreation	8.8	14.9	8.6	14.7	-200
Accommodation and Food Service	3.1	5.35	3.4	5.8	300
Public Administration	7.1	12.1	7.1	12.1	0
Other	6.1	10.3	5.9	10.1	-200
	10.0	17.0	10.1	17.2	100

*Other sectors include agriculture, forestry, fishing, and hunting; mining, utilities, wholesale trade, information, finance and insurance, real estate and rental and leasing, professional and technical services, management of companies and enterprises, and administrative and waste services



High unemployment continues to be of concern in the district. In the graph above, the seasonal nature of employment can be seen, with high unemployment percentages throughout the winter months.

Economy

REGIONAL INDUSTRY CLUSTER TARGETS

An industry cluster is a collection of related geographically bounded firms that together can create a competitive advantage for the firms and the associated local economies. Focusing economic development initiatives at specific identified clusters provides three major advantages: multiplier effects are stronger, employment growth potential is enhanced, and new firm spin-offs are promoted (Barley, Henry 2005). There are various methodologies for identifying a regional economy's clusters. This analysis used three primary metrics to identify existing clusters, coupled with recent job growth data to identify potential emerging clusters.

UTILIZING THE LOCATION QUOTIENT METHODOLOGY FOR INSIGHT

The Location Quotient (LQ) technique is a common economic analysis method to determine the value or concentration of a community's business or industry clusters. In the following analysis, we are comparing the regional economies of the district to the national economy. The purpose of this type of analysis is to identify businesses that are exporting goods out the region thus bringing capital back into the community. This type of analysis is to be used as a guide to consider focusing economic development strategies around the concentrated clusters.

The Location Quotient (LQ) is a ratio measure of the concentration of a cluster in a particular location relative to the national average. So, The LQ is a measure of an industry's level of concentration within a location, with an $LQ > 1$ indicating higher than average concentration in that location. Location Quotient data is available for three primary metrics: the number of establishments, the number of employees, and wages all tied to existing industry classification categories. An interpretation of the data follows the table below

This is an important concept in understanding the basics of wealth creation. If a business that sharpens cutting blades purchases a loaf of bread from a local bakery, or if the baker has his or her saw blades sharpened, money is simply exchanged within the community. But, if the baker begins packaging bread and exporting it for sale outside the region, the money used to purchase the bread in another location now becomes new capital within the baker's community. The baker is now importing additional wealth where his or her business is located. It's not a simple exchange of existing capital. Goods are exported and capital is imported.

In the table on the following page, there are four columns with an LQ score: Industry Cluster Establishments LQ, Industry Cluster Employment LQ, Industry Cluster Annual Wages LQ, and Total LQ. The previously mentioned first three columns of LQ, are color-coded as follows: .97 to 1.49 in yellow, 1.50 to 1.99 in orange, and 2.0 to 3.48 in red. A total IQ column was created to show the sum of the three metrics color-coded as 1.99 to 2.86 as yellow or level 3, 2.98 to 4.81 as orange or level 2, and 5.05 to 8.44 as red or level 1.

The industries, from a pure numeric standpoint (LQ), that appear to offer a high competitive advantage include: Electrical Equipment, Appliance and Component Manufacturing; Forest

and Wood Products; Arts, Entertainment, Recreation and Visitor Industries; and Glass and Ceramics. Industries with a medium competitive advantage include: Machinery Manufacturing; Primary Metal Manufacturing; Chemicals and Chemical Based Products; and Biomedical/Biotechnical. Other industries with either a competitive advantage or recent job growth (emerging) include: Apparel and Textiles; Energy; Education; Transportation Equipment Manufacturing; Mining; Agribusiness; Advanced Materials; and Information Technology and Telecommunications.

Description - 2010 - A current snapshot	QCEW Cluster - Establish	Ind Clust Establish LQ*	QCEW Cluster - Employ	Ind Clust Employ LQ*	QCEW Cluster - Wages	Ind Clust Annual Wages LQ*	Total LQ*	Priority Sector Targets
Electrical Equipment, Appliance & Component Mfg	5	<u>2.45</u>	183	<u>2.51</u>	\$8,890,876	<u>3.48</u>	<u>8.44</u>	Level 1 Priority
Forest & Wood Products	74	<u>1.75</u>	<u>1,368</u>	<u>2.15</u>	\$63,780,797	<u>3.35</u>	<u>7.25</u>	Level 1 Priority
Arts, Entertainment, Recreation & Visitor Industries	<u>271</u>	<u>1.68</u>	<u>3,949</u>	<u>1.68</u>	<u>\$100,440,584</u>	<u>1.88</u>	<u>5.24</u>	Level 1 Priority
Glass & Ceramics	8	<u>1.64</u>	133	<u>1.61</u>	\$4,644,536	<u>1.8</u>	<u>5.05</u>	Level 1 Priority
Machinery Manufacturing	11	<u>0.96</u>	426	<u>1.58</u>	\$24,045,115	<u>2.27</u>	<u>4.81</u>	Level 2 Priority
Primary Metal Manufacturing	2	<u>1.31</u>	49	0.76	\$3,397,839	<u>1.36</u>	<u>3.43</u>	Level 2 Priority
Chemicals & Chemical Based Products	34	0.85	980	<u>1.11</u>	\$44,802,399	<u>1.23</u>	<u>3.19</u>	Level 2 Priority
Biomedical/Biotechnical (Life Sciences)	<u>163</u>	0.83	<u>6,011</u>	0.92	<u>\$248,385,377</u>	<u>1.23</u>	<u>2.98</u>	Level 2 Priority
Apparel & Textiles	25	0.54	469	<u>1.11</u>	\$14,577,424	<u>1.21</u>	<u>2.86</u>	Level 3 Priority
Energy (Fossil & Renewable)	<u>255</u>	<u>1.04</u>	<u>2,112</u>	0.81	\$90,969,130	0.73	<u>2.58</u>	Level 3 Priority
Education & Knowledge Creation	61	0.81	<u>1,569</u>	0.69	\$68,891,979	<u>0.97</u>	<u>2.47</u>	Level 3 Priority
Transportation Equipment Manufacturing	3	<u>1.61</u>	52	0.31	\$3,296,878	0.46	<u>2.38</u>	Level 3 Priority
Mining	8	<u>1.32</u>	32	0.49	\$1,317,247	0.49	<u>2.3</u>	Level 3 Priority
Agribusiness, Food Processing & Technology	51	0.63	742	0.55	\$26,767,018	0.81	<u>1.99</u>	Level 3 Priority
Advanced Materials	44	0.53	<u>1,477</u>	0.7	\$72,133,936	0.75	1.98	Emerging
Defense & Security	<u>120</u>	0.6	<u>1,788</u>	0.55	<u>\$108,508,329</u>	0.74	1.89	
Printing & Publishing	69	0.59	585	0.61	\$25,833,744	0.68	1.88	
Business & Financial Services	<u>569</u>	0.65	<u>2,814</u>	0.54	<u>\$175,364,876</u>	0.63	1.82	
Fabricated Metal Product Mfg	16	0.51	245	0.52	\$10,914,359	0.72	1.75	
Information Technology & Telecommunications	82	0.39	<u>1,252</u>	0.55	\$95,703,215	0.72	1.66	Emerging
Manufacturing Supercluster	41	0.5	<u>1,079</u>	0.43	\$58,724,497	0.55	1.48	
Computer & Electronic Product Mfg	4	0.55	124	0.42	\$8,179,433	0.45	1.42	
Transportation & Logistics	85	0.65	528	0.3	\$19,831,151	0.37	1.32	

**The Location Quotient is a ratio measure of the concentration of a cluster in a particular location relative to the national average. So, The LQ is a measure of an industry's level of concentration within a location, with an LQ > 1 indicating higher than average concentration in that location. Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW) and Purdue Center for Regional Development (cluster definitions).*

For the above analysis, industry clusters are labeled emerging which have individual LQ metrics of less than 1 but have experienced an increase in jobs between 2009 and 2011. Two emerging industry clusters of note in the LDD were identified as Advanced Materials and Information Technology and Telecommunications. See the growth in jobs over the last 2 and 10 years on the following page. The color coding in the following 2 tables matches the classification above for comparison.

The top performing clusters from a LQ wages perspective in the district were Arts, Entertainment, Recreation and Visitor Industries at \$100,440,584; and Biomedical/Biotechnical at \$ 248, 385,377

Recent 2 Year Positive Growth Industries (2009 to 2011)				
<i>Cluster Name (NAICS2007)</i>	<i>09 Jobs</i>	<i>11 Jobs</i>	<i>Added</i>	<i>% Change</i>
Business & Financial Services	7,266	7,835	<u>569</u>	8%
Forest & Wood Products	2,559	3,056	<u>497</u>	19%
Energy (Fossil & Renewable)	2,713	3,016	<u>303</u>	11%
Biomedical/Biotechnical (Life Sciences)	5,867	6,139	<u>272</u>	5%
Arts, Entertainment, Recreation & Visitor Industries	4,318	4,385	67	2%
Chemicals & Chemical Based Products	811	834	23	3%
Information Technology & Telecommunications	1,622	1,643	21	1%
Advanced Materials	1,203	1,222	19	2%
Agribusiness, Food Processing & Technology	323	342	19	6%
Apparel & Textiles	258	275	17	7%
Transportation Equipment Manufacturing	72	74	2	3%

Historic 10 Year Positive Growth Industries (2001 to 2011)				
<i>Cluster Name (NAICS2007)</i>	<i>01 Jobs</i>	<i>11 Jobs</i>	<i>Added</i>	<i>% Change</i>
Business & Financial Services	4,580	7,835	<u>3,255</u>	71%
Biomedical/Biotechnical (Life Sciences)	5,307	6,139	<u>832</u>	16%
Defense & Security	1,254	1,590	<u>336</u>	27%
Arts, Entertainment, Recreation & Visitor Industries	4,065	4,385	<u>320</u>	8%
Machinery Manufacturing	80	330	<u>250</u>	<u>313%</u>
Agribusiness, Food Processing & Technology	273	342	69	25%
Printing & Publishing	672	736	64	10%
Education & Knowledge Creation	675	720	45	7%

Infrastructure

ELECTRIC POWER

There are currently six electrical service providers operating in the District. Haywood Electric Membership Cooperative (HEMC) and Duke Energy (merged with Progress Energy July 2012) serve Haywood County. HEMC also serves some of southern Jackson County and a small section of southeastern Macon County. The Town of Waynesville in Haywood County is an “electric city” buying electricity wholesale from Duke for resale to town customers. Duke Energy serves most of Jackson and Macon Counties; and, all of Swain and Graham Counties. The Town of Highlands in Macon County is an “electric city” buying wholesale from Duke. Blue Ridge Electrical Membership Cooperative (BREMC) and Duke Energy serve Clay County and Cherokee County. Murphy Electric Power Board serves the Town Murphy and nearby

areas. Both BREMC and Murphy Electrical Power Board buy wholesale from the Tennessee Valley Authority (TVA).

NATURAL GAS

Two companies provide natural gas in four of the District's seven counties. The Public Service Company of North Carolina (PSNC Energy) serves portions of Haywood, Jackson, and Swain Counties. Toccoa Natural Gas serves a portion of Macon County. Only four counties in North Carolina have no natural gas availability. Of those four, three are located within the Southwestern District; Cherokee, Clay, and Graham.

TELECOMMUNICATIONS

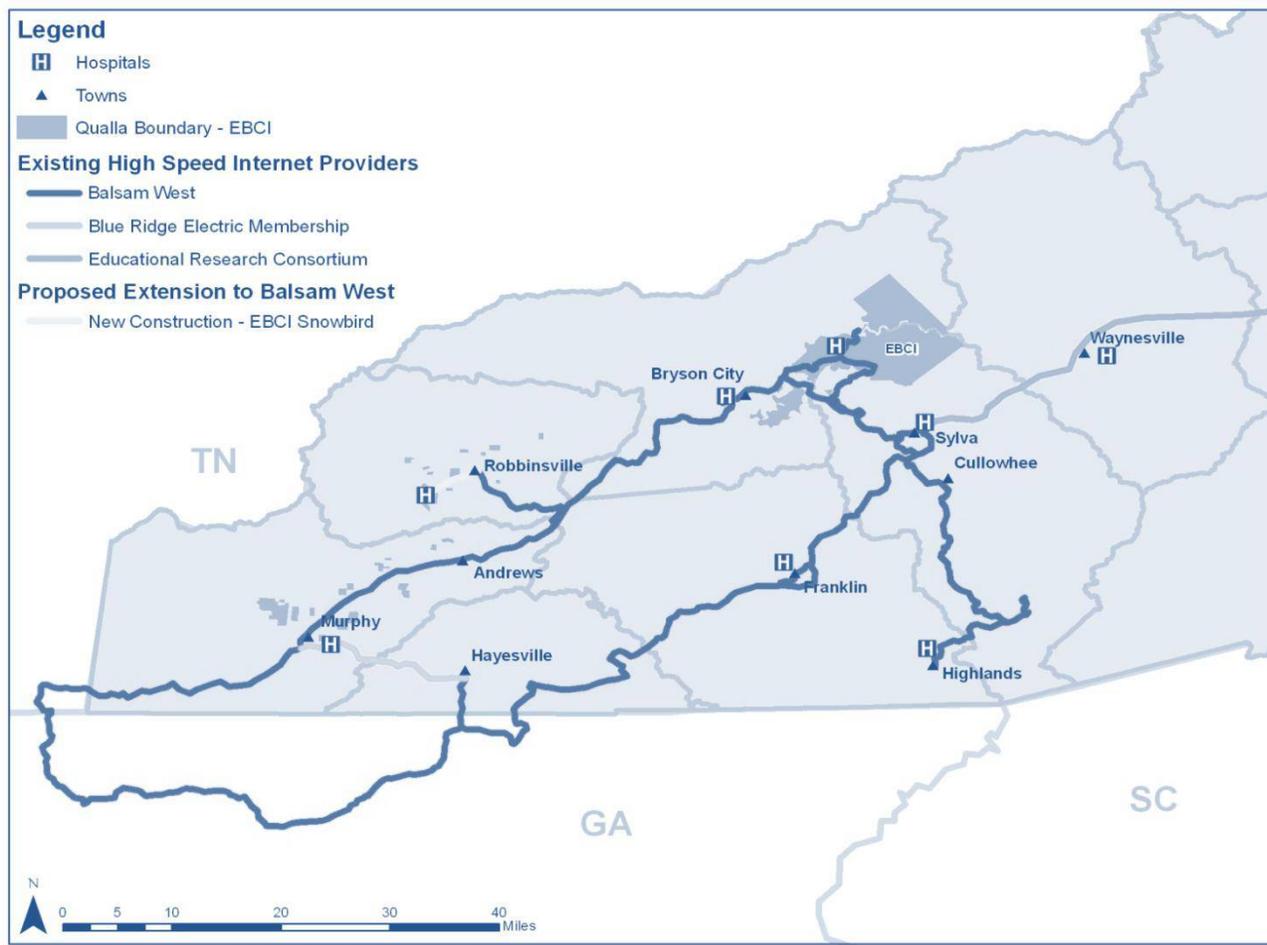
Telecommunication capabilities within the District are steadily increasing. Currently nine companies provide service: Frontier Communications, Morris Communications, Cherokee Cable, Blue Ridge Electric Membership Corporative, Murphy Cable, Zito Cable, D-Net, Cherokee Broadband Enterprise, and Balsam West.

BalsamWest FiberNET is a wholesale transport carrier with service through the District. Founded in 2003, BalsamWest is jointly owned by the Eastern Band of Cherokee Indians and Drake Enterprises. With over 300 miles of underground fiber serving 10 counties in NC, GA & TN, BalsamWest is the first provider in the region to offer protected services that are not only redundant but geographically diverse with connections to major data hubs in Atlanta and Charlotte. The primary backbone is made up of Cisco SONET equipment operating at OC-192. In 2012-13 BalsamWest will establish additional fiber connections to Asheville and Knoxville and also deploy DWDM technology, further insuring the region's fiber redundancy and capacity to serve 21st century business.

BalsamWest has enabled low-cost access to high capacity bandwidth for Internet service, security, phone and high-demand applications such as video, data and distance learning. The District's public education system, including the three community colleges and Western Carolina University, have created the WNC Educational Network via a partnership with Balsam West to deliver last mile broadband to all 70+ schools in the District.



Smoky Mountain Center for the Performing Arts, Franklin, NC



Map - High Speed Fiber in the District

INDUSTRIAL PARKS AND BUILDINGS

Land is available for industrial and business enterprise development throughout the District. Haywood, Macon and Swain Counties have industrial parks with available space. All seven of the District's counties have sites and available buildings that are "certified" as ready for occupancy by the NC Dept of Commerce and Advantage West NC.

SOCIAL ENTERPRIZES

The district is home to three non-profit, job-producing, social enterprises/companies. They are Industrial Opportunities Inc. (IOI) in Cherokee County, Haywood Vocational Opportunities (HVO) in Haywood County and Webster Enterprises in Jackson County. These enterprises are creating jobs for and serving adults with physical and mental disabilities. The combined jobs, payrolls, fringe benefits and economic impacts of these three enterprises are significant. Their total annual economic impact in the District is almost \$50M.

HIGHWAYS

The District is located within 500 miles of most major eastern cities and over half the US population. Highway access eastward towards Asheville/Charlotte and eastern seaboard markets is via I-40. I-40 is also the western route to Knoxville/Nashville, Tennessee and the Ohio Valley. Chattanooga, Tennessee and the Mississippi Valley are accessed via US Highway 64 from Murphy in Cherokee County. Atlanta and the cities to the south are accessed via US Highway 441 that runs south from Franklin in Macon County. Except for short sections, all these routes are interstate grade and quality.

Two of these routes are part of the nearby complete Appalachian Corridor system. Except for an unresolved section through Graham County, Corridor K (which includes portions of US 23, 64, 74, and 129) is complete from I-40 near Waynesville west to the Tennessee state line near Murphy. A regional effort is underway to resolve this Corridor K “missing link” issue. The Southwestern NC EDD’s Rural Transportation Planning staff is managing this effort on behalf of ARC, NCDOT and USDOT. Corridor A (which includes portions of US 23, 64, and 441) breaks south from Corridor K near Sylva and goes to Atlanta. It is complete to the Georgia state line and from there to Atlanta.

Improvements in the highway system have reduced transportation cost, opened scenic routes to tourists, and increased the mobility of the residents. However, highway transportation improvements continue to be critical to the District because several major “bottlenecks” still exist. Cherokee, Clay, and Graham Counties are not accessible in any direction via a four-lane road. Cherokee and Clay, however, are within close proximity to four-lane access southward towards Atlanta. Graham County can only be accessed from any direction via curvy two-lane highways. The southern portions of Jackson and Macon Counties (Glennville-Cashiers and Highlands) have only narrow, curvy two-lane access. The opening of the Cherohala Skyway between Robbinsville in Graham County and Townsend, Tennessee is funneling higher levels of tourist traffic into Graham County. This has increased the demand for local amenities to serve this traffic. In short, efforts need to be continued toward the completion of Appalachian Corridor K.

RAILWAYS

Norfolk-Southern Railway and the Great Smoky Mountain Railroad (GSMR) provide rail transportation that together bisects the District from Canton west to Andrews. Norfolk-Southern Railroad freight stops are located at Canton, Clyde, Waynesville, and Sylva. The GSMR has stops at Dillsboro, Bryson City, Nantahala Gorge, and Andrews. The GSMR route from Dillsboro to Andrews is primarily an excursion route for tourism with on-demand freight runs. It should be noted that both these rail lines are aging and will need on-going repairs to meet basic standards of transport and safety.

AIR

The District is readily accessible by air. A major commercial airport is located in nearby Asheville. The Asheville Regional Airport provides commercial airline service to the Atlanta and Charlotte hubs; also, direct service to several major eastern and southeast cities. The District's three lighted and paved airports which can accommodate general aviation aircraft are: Western Carolina Regional Airport in Cherokee County with a 5,500 foot runway; Macon County, with a 5,000 foot runway; and Jackson County, with a 3,000 foot runway. Local officials have recently expanded and upgraded both the Western Carolina Regional Airport and the Macon County Airport. The Western Carolina Regional Airport recently upgraded in order to handle commercial jets, thus opening up the western part of the District to activities requiring this capacity.

PEDESTRIAN AND BICYCLE

Regionally, a concerted effort towards developing pedestrian and bicycle friendly communities has begun. In Jackson County, NC Highway 107 near Western Carolina University, now have bike lanes as does US Highway 441 in the business district of Cherokee. Old sidewalks in Franklin are being repaired and new sidewalks are being constructed to connect existing sidewalks to the greenway. The NC Department of Transportation is now including pedestrian and bicycle components in new road plans where feasible throughout the area. The Southwestern NC EDD is managing a regional trails initiative/plan funded by the NC Department of Parks of Recreation. This plan is scheduled for completion in early 2013.

HEALTH CARE

Excellent primary, emergency and in-patient health care is available in the District. Nearby trauma centers are located in Asheville and Chattanooga. As is the case across rural America, the District's hospitals and medical centers are undergoing transformation and flux as a requirement for financial survival. At the organizational level this involves both in-District mergers and out-of-region contractual associations with much larger hospital corporations. Haywood Medical Center, Swain County Hospital and Harris Hospital have formed an affiliation to provide care, reduce costs, and share resources. Cherokee Hospital, Angel Medical Center, Highlands-Cashiers Hospital and Murphy Medical Center work cooperatively with the new partnership and with Mission hospitals in Asheville. In Graham County, Tallulah Health Center has joined Mission Medical Associates of Asheville. Other than the county health department, Tallulah Health Center has been the sole provider of local treatment in Graham County for the past twenty years. Over 200 active physicians, 600 registered nurses and 500 licensed practical nurses provide medical care in the District. With the exception of Haywood and Jackson Counties, there is a noticeable shortage of dental care in the District. This is especially acute in Clay and Graham Counties. The number of people per provider in those counties is over three times the state average. Further, and equally troubling, none of the dental care providers in the District accepts Medicaid patients. Some indigent patients have had

to go as far as Charlotte to get dental care. Clinics served by volunteer practitioners are often (but temporarily) set up at various locations in the District for the purpose of providing free mobile dental care.

Analysis of Economic & Community Development Challenges & Opportunities

The following are the results of a strengths, weaknesses, opportunities, and threats (SWOT) analysis, relating to economic development in the District, developed by the strategy committee combined with input from the local county economic developers in 2012. The list was divided into three major categories: Infrastructure & Environment, Community, and Workforce.

Infrastructure and Environment

Strengths

- Highway system
- Dependable/reliable, community-engaged electric power suppliers
- World-class broadband transport (BalsamWest Fibernet, MCNC, ERC)
- Water and wastewater capacities
- Natural gas lines in 4 of 7 of counties
- Favorable climate/clean environment
- Substantial public lands base (eco-tourism capacity)
- Available manufacturing buildings and sites
- Resurgence in manufacturing and agricultural sectors
- Methane recapture at Jackson County landfill
- Rail (GSMR) for tourism and freight

Weaknesses

- Gap in east/west freight corridor (missing link of Corridor K)
- Gap in north-south roadway access to Cashiers, Highlands, Sapphire
- Challenging terrain/expensive land
- Lack of last mile broadband/connectivity
- Lack of natural gas lines in Clay, Cherokee and Graham Counties
- Limited tax base (for financing of infrastructure)
- Lack of regional marketing of assets; sites, fiber, etc.
- Lack of water and sewer capacity in developable areas

Opportunities

- Established public sector collaboration across boundaries
- Appalachian Regional Commission & other federal assistance
- NC Rural Center
- Emerging wireless delivery technologies

- Frontier/Duke/BalsamWest/ and other utility ongoing investments
- Competitive energy rates

Threats

- Aging wastewater systems, deferred maintenance funding
- Insufficient densities for last mile broadband build out demand
- Increased development pressure on the environment
- Unmanaged/unplanned growth and development
- Lack of reliable performance data to guide infrastructure investment
- Resistance to location/siting of new infrastructure or upgrades (e.g. electric transmission lines, substations)

Communities

Strengths

- Passionate, committed leadership (elected and volunteer)
- Rich historic & cultural heritage
- Quaint, historic downtowns
- Vibrant tourism economy
- Proximity to larger metropolitan areas
- National trend toward small town lifestyle
- Access to vast public recreational opportunities
- Community support of local agricultural products
- Strong arts sector

Weaknesses

- Lack of bicycle and pedestrian transportation systems
- Lackluster economic growth
- Lack of public/private sector planning
- Insufficient economic diversity
- Run down appearance of some communities/corridors
- Apathy towards community revitalization
- High percentage of low income residents
- Competitive nature among communities within the region

Opportunities

- Strong community partnerships
- Strong non-profit sector
- Increased demand for rural products "back to roots" concept
- Job creation potential in rural areas
- Strong tourism base
- Underutilized parcels and buildings
- Senior community growth - housing/facility development
- WNC Regional Livestock Market (more profitable to maintain small farms)

Threats

- Brain drain - lack of good paying jobs
- Tension of local vs. newcomers
- Lack of form based codes in downtowns
- Lack of a regional strategic vision
- Commercial development outside of commercial areas

Workforce

Strengths

- Regional educated workforce (>25, 80% HS diploma, 20% bachelor's)
- Western Carolina University, 4 year college with strong engineering programs
- Dependable network of community colleges (TCCC, HCC, SCC)
- Existing industry support from community colleges
- Experienced older workforce
- Network of Career One-Stop Centers
- Availability of career readiness certificates
- Workforce Investment Act/on-the-job training funds

Weaknesses

- Lack of fixed-route public transportation
- Long-term decline of manufacturing jobs
- Lack of full-time, livable wage jobs with benefits
- Low numbers of highly skilled technical workers (e.g. CNC)
- High unemployment rates (above state and federal averages)
- High percentage of population over 65
- Segments of labor force have difficulty passing drug screening

Opportunities

- Expansion at Harrah's Casino
- Expanding health care sector (supported by aging population)
- Public support systems for existing companies
- Educating high school students about the region's job opportunities

Threats

- Limited employment options
- Lack of diversity in the regional economy
- Brain drain, young people leaving the area for better opportunities
- Children under the age of 18 living in poverty
- Wages in the region have not risen w/ cost of living

Economic Development Partners

ADVANTAGE WEST

AdvantageWest is western North Carolina's regional economic development organization. The District's seven counties are all in the AdvantageWest 23-county service area. Chartered by the North Carolina General Assembly in 1994, AdvantageWest is a non-profit public-private partnership whose primary focus is marketing the North Carolina mountains to business and corporations seeking to relocate or open a new facility or expand an existing business; and to those who might otherwise improve the quality of life for citizens through activities such as filmmaking and tourism.

AdvantageWest covers nearly 10,000 square miles, an area larger than eight U.S. states. Publications such as Money, Kiplinger's, Outside, American Style, Modern Maturity and Forbes have ranked western North Carolina as a top destination for living, working, recreation, arts, technology, and retirement.

The following goals are identified as priorities in the AdvantageWest five year plan:

Goal 1: Grow and support several “clusters of innovation” in regional niches with education, infrastructure, services, and technology transfer

Goal 2: Institutionalize capacity for strategic thinking, research, policy development, collaboration and leadership on the regional economy

Goal 3: Change the culture of educational institutions (K-1), community colleges, and universities) and the expectations and skills of workers to meet the needs of growing companies in clusters of innovation

Goal 4: Establish “tier 2” level of broadband internet service for the entire service area

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION (NCDOT)

The Southwestern Rural Planning Organization (RPO) is an agency that provides transportation planning support to all of the local governments in the EDD. It serves as a forum for local officials and citizens to interact with North Carolina Department of Transportation staff on a regular basis, and for NC DOT to obtain meaningful local input on transportation plans and projects. The Southwestern Commission provides staff, and local government officials from across the region comprise the decision making committee of the RPO. The NCDOT provides 80% of the funding for the RPO.

NCDOT engages in a statewide project prioritization process every two years. The RPO prioritizes regional projects using a methodology that considers the inclusion of the project in a plan, the importance of the project to the county in which it is located, and other quantitative metrics such as safety and traffic data. The RPO is then able to submit new projects to NCDOT for prioritization, as well as rank and score projects already in the system. NCDOT Division 14 also submits, ranks and scores projects. Together, the input from the RPO and the division determine how the region's transportation needs are prioritized statewide, to be scheduled for eventual project development and funding.

Below are the top 20 projects in the Southwestern RPO region, for the most recent prioritization (P2.0), which occurred in 2011:

1. NC 107 from US23 to NC116- Jackson County
2. Corridor K- new divided 4-lane through Graham and Cherokee Counties, to TN
3. US 19 from Hughes Branch Rd to 441- Swain County
4. Iotla Church Rd from NC 28 to Iotla Baptist Church – Macon County
5. NC 69 from US 64 to GA state line- Clay County
6. New westbound intersection from US 23 onto US 74W- Jackson County
7. US 23 (Asheville Highway) from NC 107 to Hospital Rd- Jackson County
8. Joe Brown Highway from Murphy to Hiawasse Dam- Cherokee County
9. US 441 Business intersection improvements- Macon County
10. US 23-441 from US 64 to Terrell Rd- Macon County
11. Tusquittee Rd (SR 1307) safety improvements- Clay County
12. Davis Creek Rd improvements to TN state line- Cherokee County
13. Depot St. intersection improvements with Deep Creek Rd- Swain County
14. New facility paralleling Long Creek, to connect industrial park- Graham County
15. Intersection upgrades to US 74 with Lower Alarka Road- Swain County
16. Buck Creek Rd upgrades north of Highlands- Macon County
17. Old Settlement Rd from NC 107 to NC 116- Jackson County
18. SR 1135 Settawig Rd safety improvements- Clay County
19. Shuler Creek Rd from Morrow Rd to TN state line- Cherokee County
20. Deyton Camp Rd upgrade- Graham County

COUNTY ECONOMIC DEVELOPERS – LOCAL PARTNERS

In the district, six out of the seven counties, and the Eastern Band of Cherokee Indians, have dedicated full-time economic development staff. Jackson County is the only county currently without the position, however, they are currently being assisted through the use of a consultant and a local partnership to revamp the way they conduct economic development activities. It's expected that Jackson County will soon have a fulltime economic development director. The county developers' recently formed a marketing alliance to promote and market the assets of the region with a focus on technology and

advanced manufacturing. The service area for the new alliance includes the six western counties and the Eastern Band of Cherokee Indians.

County Economic Development Department

Director

Cherokee County

Josh Carpenter

Clay County

Brian Trout

Graham County

Andy Cable

Haywood County

Mark Clasby

Jackson County

Vacant–Planner Gerald Green

Macon County

Tommy Jenkins

Swain County

Ken Mills

Eastern Band of Cherokee Indians

Jason Lambert

NORTH CAROLINA DEPARTMENT OF COMMERCE, COMMUNITY INVESTMENT & PLANNING

The North Carolina Department of Commerce staffs a local developer, Jennifer Hogsed, in Bryson City serving the same footprint as the district. The district also relies heavily on the Division of Community Planning’s Asheville office for planning capacity associated with land use and growth management.

SMOKY MOUNTAIN HOST – REGIONAL TOURISM DEVELOPMENT

Smoky Mountain Host of North Carolina is the destination marketing organization for the seven western counties of North Carolina and the Qualla Boundary of the Eastern Band of Cherokee Indians. The organization plays a critical role in promoting one of our primary industry sectors which the district has a distinct competitive advantage in. Services include marketing coordination, travel guide development and the operation of travel center serving as a gateway to the district just south of Franklin NC.

CONSERVATION& NON-PROFIT PARTNERS

The Land Trust for the Little Tennessee (LTLT) is the strongest conservation non-profit organization in Region A. It has led in conserving 20,000 acres and has brought over \$35,000,000 of conservation investment into the region since 1999. In 2011 the oldest watershed association in the southern Blue Ridge (the Little Tennessee Watershed Association) merged into LTLT giving the organization greater capacity to support both land and water conservation issues.

With a mission to conserve the waters, forests, farms, and heritage of the upper Little Tennessee and Hiwassee River basins (including the Tuckasegee, Cheoah and Valley Rivers), LTLT has helped to conserve watershed lands of the municipalities of Waynesville, Sylva, Bryson City, Murphy, and Andrews. It has conserved over 40 miles of river frontage, hundreds of miles of streamside zones, and hundreds of acres of prime farmland.

LTLT has worked with the Cherokee to conserve ancient settlement sites, it is working to revitalize the Cowee-West's Mill Historic District (the largest National Register District in Region A), and it is a supporting partner for the expansion of local food networks in the region. LTLT also has active programs in support of wildlife habitat restoration, water quality monitoring, and sustainable forest management.

Other environmental non-profits operating in the district include: the Tuckasgee River Watershed Coalition, the Hiwassee River Watershed Association, and the Western North Carolina Alliance.

FOUNDATIONS & CDFIs

The Cherokee Preservation Foundation's mission is to preserve our native culture, protect and enhance our natural environment, and create appropriate and diverse economic opportunities -- in order to improve the quality of life for the Eastern Band of Cherokee Indians and our neighbors in western North Carolina. Examples of work in which they are involved include Cherokee language revitalization, perpetuation of Cherokee artistic traditions, leadership development programs for EBCI tribal members, support of entrepreneurship to diversify the regional economy, connecting rural schools with broadband and helping teachers learn and embrace technology-based learning tools, and renewable energy and energy efficiency programs. The Foundation was established as part of the Second Amendment to the Tribal-State Compact between the EBCI and the State of North Carolina. They are an independent nonprofit foundation funded by the EBCI from gaming revenues generated by the Tribe.

The Community Foundation is a nonprofit organization established in 1978 to build a permanent pool of charitable capital for the 18 counties of Western North Carolina. They work with individuals, families and corporations to create and manage charitable funds and make grants to nonprofits or public agencies in our region.

The foundation manages \$188 million (3/31/12) in assets with a long-term investment strategy will permanently protect and grow these funds. In partnership with area donors, the Foundation has awarded more than \$120 million in scholarships to students and grants to nonprofit organizations and public institutions across our 18-county region and beyond.

The Sequoah Fund is a Community Development Financial Institution that has the same geographic boundary as the EDD. They offer lending and business training opportunities. The EDD and the Sequoyah Fund leadership have forged strong relationships partnering on many projects in the district.

APPALACHIAN REGIONAL COMMISSION GOALS AND OBJECTIVES AND NC STRATEGIES

The entire EDD is within the 26 counties of North Carolina served by the Appalachian Regional Commission. ARC's overall plan, together with North Carolina's ARC strategies is summarized as follows.

ARC Goal #1: Increase Job Opportunities and Per Capita Income in Appalachia to Reach Parity with the Nation

Strategic Objective 1.1: Develop Leaders and Strengthen Community Capacity

Strategic Objective 1.2: Diversify the Economic Base

Strategic Objective 1.3: Enhance Entrepreneurial Activity in the Region

Strategic Objective 1.4: Develop and Market Strategic Assets for Local Economies

Strategic Objective 1.5: Increase the Domestic and Global Competitiveness of the Existing Economic Base

Strategic Objective 1.6: Foster the Development and Use of Innovative Technologies

Strategic Objective 1.7: Capitalize on the Economic Potential of the Appalachian Development Highway System

Strategic Objective 1.8: Encourage Sustainable Economic Use of Natural Resources

Strategic Objective 1.9: Encourage Investments in Energy Projects that Create Jobs

ARC Goal #2: Strengthen the Capacity of the People of Appalachia to Compete in the Global Economy

Strategic Objective 2.1: Develop and Strengthen Community Capacity

Strategic Objective 2.2: Enhance Workforce Skills Through Training

Strategic Objective 2.3: Increase Access to Quality Child Care and Early Childhood Education

Strategic Objective 2.4: Increase Educational Attainment and Achievement

Strategic Objective 2.5: Expand Community-Based Wellness and Disease Prevention Efforts

Strategic Objective 2.6: Increase the Availability of Affordable, High Quality Health Care

ARC Goal 3: Develop and Improve Appalachia's Infrastructure to Make the Region Economically Competitive

Strategic Objective 3.1: Develop Leaders and Strengthen Community Capacity

Strategic Objective 3.2: Build and Enhance Basic Infrastructure

Strategic Objective 3.3: Increase the Accessibility and Use of Telecommunications Technology

Strategic Objective 3.4: Build and Enhance Environmental Assets

Strategic Objective 3.5: Promote the Development of an Intermodal Transportation Network

ARC Goal 4: Build the Appalachian Development Highway System to Reduce Appalachia's Isolation

Strategic Objective 4.1: Develop Leaders and Strengthen Community Capacity

Strategic Objective 4.2: Promote On-Schedule Completion of the ADHS

Strategic Objective 4.3: Improve Planning to Enhance Multi-Jurisdictional Coordination and Efficiency

Strategic Objective 4.4: Encourage Intermodal Coordination

Strategic Objective 4.5: Enhance the Energy Efficiency of the Transportation System

Strategic Objective 4.6: Develop a Transportation System that Enhances and Preserves the Region's Environmental Quality

NORTH CAROLINA ECONOMIC DEVELOPMENT PLAN

Governor Perdue's economic development plan is driven by the principal of innovation. The governor is striving to create an innovation-based economic development portfolio that includes a diversified business climate, a green economy, a supportive entrepreneurial environment, thriving Main Street communities and a well-educated workforce. Federal and state funding will be accessed to help develop infrastructure systems that are critical to the decision-making process for companies to locate and expand in western North Carolina communities. Having quality roads, water and sewer systems and access to broadband are essential components in attracting and retaining businesses in communities. Federal and state funding will also be used to strengthen the entrepreneurship network in Western North Carolina. Small businesses are a critical component of the economic development landscape.

The Governor's plan has three principal goals

Goal 1: Create a world class, globally competitive economic and business development system that continually positions North Carolina for a sustainable and growing economy and creates a permanent competitive advantage.

Goal 2: Develop and promote North Carolina as a global leader in innovation and technology with a highly educated and qualified workforce.

Goal 3: Promote community and business development policies, programs, and services that seek to improve the prosperity of disadvantaged populations and communities across North Carolina.

Governor Perdue announced in August of 2010 that North Carolina has received \$115 million in five federal recovery grants to extend broadband connectivity in North Carolina. These funds will create jobs and help spur economic development through expanded access to high-speed Internet in underserved areas. Through two rounds of recovery funding, North Carolina has received over \$255 million for broadband. One of these grants will assist the EDD via funding for BalsamWest FiberNet and the WNC Education and Research Consortium.

LOCAL GOVERNMENT ECONOMIC DEVELOPMENT STRATEGIES AND FUTURE PROJECTS

Cherokee County:

- a. Completion of Comprehensive Master Plan including a transportation component
- b. Focus on retaining and expanding existing industry
- c. Retrain and retain high quality workers; Increase high school and college graduation rates; encourage students to obtain Career Readiness Certificates
- d. Develop and expand multimodal transportation system including:
 - i. Better inter-county/interstate connections
 - ii. Davis Creek Road Upgrades
 - iii. Bike path from Murphy to Andrews
 - iv. Joe Brown Highway Upgrades
 - v. Shuler's Creek Road Upgrades
- e. Secure natural gas service
- f. Develop interconnected greenway and/or trail systems
- g. Improve information technology & broadband capacity across county
- h. Market Western Carolina Regional Airport (formerly Andrews-Murphy Airport), build terminal building, and connect to Andrews' public water and sewer systems
- i. Build more recreation facilities in the western portion of the county
- j. Increase affordable housing availability
- k. Set aside new land for industrial development
- l. Participate with neighboring Graham County and entire region to achieve resolution of Corridor K missing link
- m. Improve solid waste management and recycling systems
- n. Implement Murphy and Andrews components of Blue Ridge National Heritage Area Tourism
- o. Interconnect Andrews and Murphy sewer systems along US 74-19-129

Town of Andrews:

- a. Investigate/replace aging/leaking water and sewer lines
- b. Develop an alternative wastewater treatment with water recovery
- c. Extend water and sewer service beyond town limits to pick up new customers
- d. Develop an alternative raw water source to meet future demand
- e. Develop industrial park and alternative industrial sites
- f. Downtown beautification and revitalization
- g. Greenway and trail system
- h. Improve solid waste management and recycling systems

- i. Participate in western cluster of NC STEP (Small Town Economic Prosperity) program via NC Rural Center
- j. Complete permanent protection for Andrews' Beaver Creek Watershed

Town of Murphy:

- a. Replace aging/leaking water and sewer lines
- b. Extend water and sewer to areas that need service
- c. Renovate Police Department
- d. Improve solid waste management and recycling systems
- e. Upgrade water treatment plant
- f. Develop park at old L&N Depot and restore railroad service to Murphy (via GSMR)
- g. Increase parking downtown
- h. Downtown beautification, pedestrian improvements, and revitalization
- i. Greenway and trail system
- j. Complete (in cooperation with Cherokee County) renovation of existing sewer system in vicinity of Valley River and new extensions to areas of Pleasant Valley-Regal Street

Clay County:

- a. Develop surface water source on TVA Lake Chatuge (to replace groundwater wells), including surface water treatment system / plant
- b. Extend water and sewer services to un-served areas and growth corridors
- c. Participate with neighboring Graham County and entire region to achieve resolution of Corridor K missing link
- d. Develop greenways and trail systems in cooperation with the US Forest Service and Towns County, Georgia
- e. Increase affordable housing availability
- f. Develop and expand inter-modal transportation system including inter-county/interstate connections
- g. Implement components of Blue Ridge National Heritage Area Tourism Plan
- h. Renovate / expand county's wastewater treatment plant
- i. Participate (with Hayesville) in western cluster of NC STEP (Small Town Economic Prosperity) program
- j. Secure natural gas service
- k. Improve broadband internet and information technology service across county

Town of Hayesville:

- a. Annex growth areas that petition for annexation
- b. Provide municipal services to growth areas
- c. Downtown beautification, pedestrian improvements, and revitalization
- d. Improve and extend sidewalk system
- e. Participate in western cluster of NC STEP (Small Town Economic Prosperity) program

Graham County:

- a. Construct new county administration building, social services department and jail

- b. Create an effective strategy for promotion of entrepreneurship among residents
- c. Design and implement a marketing model to attract and retain businesses
- d. Participate with neighboring Cherokee County and entire region to achieve resolution of Corridor K missing link
- e. Provide infrastructure to aid in the development of tourism amenities, especially motel, restaurant, camping and other small businesses
- f. Increase information technology infrastructure and availability through cooperative efforts with private providers (Balsam West, D-Net, etc)
- g. Increase broadband internet/information technology at Robbinsville Campus of TCCC
- h. Expand “green energy” workforce training opportunities at Robbinsville Campus of TCCC
- i. Increase affordable housing availability
- j. Develop and expand intermodal transportation system including inter-county/interstate connections
- k. Implement components of Blue Ridge National Heritage Area Tourism Plan
- l. Develop greenway and trail systems that focus on eco-tourism
- m. Secure natural gas service

Town of Robbinsville:

- a. Replace aging & leaking water/sewer lines
- b. Extend water/sewer to un-served areas and growth
- c. Downtown revitalization, pedestrian improvements, and beautification
- d. Complete new sewer treatment plant on Sand Hole Road
- e. Construct new groundwater wells and water storage tanks as recommended by engineers
- f. Implement NC STEP (Small Town Economic Prosperity) program

Town of Lake Santeetlah:

- a. Upgrade existing water system
- b. Develop sewer system through public/ private partnerships
- c. Develop transportation plan focusing on walking and biking
- d. Repair existing roads in need of resurfacing

Town of Fontana Dam:

- a. Construct new water treatment plant and new finished water storage tank
- b. Street resurfacing and lighting
- c. Funding and construction of a welcome center
- d. Repair sewer treatment plant and the aging service lines within the town
- e. Pedestrian and enhancement improvements
- f. Solid waste collection and disposal

Haywood County:

- a. Extend (in cooperation with the county’s four towns) water/sewer infrastructure to unserved areas and growth corridors
- b. Develop interlocal system of water/sewer system operations
- c. Expand recreation opportunities

- d. Participate with neighboring counties and entire region to achieve resolution of Corridor K missing link
- e. Develop greenways and trails system
- f. Increase affordable housing availability
- g. Improve solid waste management and recycling systems
- h. Develop and expand multimodal transportation system including inter-county/interstate connections
- i. Implement components of Blue Ridge National Heritage Area Tourism Plan
- j. Market ten acre “shovel ready” site at Beaverdam Industrial Park in Canton
- k. Complete amenities at the new Western NC Regional Livestock Market near Canton

Town of Canton:

- a. Extend water/sewer service to un-served areas and growth corridors
- b. Enhance recreation infrastructure, equipment and opportunities
- c. Additional downtown revitalization, pedestrian improvements, and beautification
- d. Upgrade and extend Champion Drive sewer system to better serve intersection with I-40, including MedWest’s new urgent care center
- e. Implement NC STEP (Small Town Economic Prosperity) program

Town of Clyde:

- a. Enhance recreation opportunities, primarily recreation infrastructure and equipment
- b. Downtown revitalization, pedestrian improvements, and beautification
- c. Greenway development
- d. Develop a wastewater system master plan and a Preliminary Engineering Report to resolve severe wastewater collection problems. The town has excessive inflow and infiltration and has been assessed civil penalties for sanitary sewer overflows.
- e. Cooperate with Junaluska Sanitary District (JSD) to construct increased water transfer capacity from Canton through Clyde to JSD

Town of Maggie Valley:

- a. Replace aging/leaking sewer lines and extend the sewer system (the Town owns/operates the public sewer system)
- b. Replace aging water lines and extend water system in cooperation with the Maggie Valley Sanitary District (which owns and operates the water system and predates the formation/charter of the Town of Maggie Valley)
- c. Expand water/sewer service to un-served areas and growth corridors
- d. Upgrade water treatment plant (Maggie Valley Sanitary District)
- e. Work with Maggie Valley Sanitary District and State of NC to secure permanent protection for Campbell Creek Watershed
- f. Continue improvement of water and sewer system (interconnections with Maggie Valley and JSD)
- g. Enhance recreation opportunities including Parham Park
- h. Downtown revitalization, pedestrian improvements, and beautification

- i. Greenway development in cooperation with Haywood County and Town of Waynesville:
 - a. Concentrate commercial development in existing commercial areas and prevent urban sprawl
 - b. Continue downtown revitalization and expand efforts to adjacent areas
 - c. Continue to enhance, implement and enforce unified land use plan and development guidelines
 - d. Protect/restrict development on steep grades
 - e. Complete NC Rural Center funded plan/strategy for more cooperative (and perhaps consolidated) tourism-lodging-restaurant-services promotion
 - f. Increase emphasis on pedestrian friendly planning
 - g. Greenway development
 - h. Improve multimodal transportation systems to interconnect neighborhoods
 - i. Increase tourist attractions and amenities
 - j. Develop public transportation system

Town of Waynesville:

- a. Concentrate commercial development in existing commercial areas and prevent urban sprawl (Unified Development Plan)
- b. Continue downtown revitalization and expand efforts to adjacent areas
- c. Continue to enhance, implement and enforce unified land use plan and development guidelines
- d. Protect/restrict development on steep grades
- e. Incorporate smart growth principles in planning efforts
- f. Increase emphasis on pedestrian friendly planning
- g. Greenway development
- h. Improve multimodal transportation systems to interconnect neighborhoods
- i. Increase tourist attractions and amenities
- j. Continue improvement of water and sewer system (interconnections with Maggie Valley and JSD)

Jackson County:

- a. Extend Tuckasee Water and Sewer Authority's (TWSA) water/sewer distribution and collection systems to unserved areas and growth corridors
- b. Continue work with TWSA and Whittier Community to improve and expand public sewer services in the Whittier-Gateway area
- c. Continue work with TWSA and Cashiers Community to improve and expand public water and sewer services in the Cashiers area
- d. Continue work on Cashiers Recreation Center Complex
- e. Continue development of greenways and trails systems
- f. Continue/complete Phase II Jackson County Services Park-Webster Complex
- g. Increase affordable housing availability
- h. Develop and expand multimodal transportation system including inter-county/interstate connections
- i. Assist Western Carolina University in development of Millennial Campus
- j. Improve traffic patterns on Highway 107
- k. Implement components of Blue Ridge National Heritage Tourism Plan
- l. Complete East Carolina University Dental Services Training Facility

- m. Continue enhancements of county subdivision ordinance, growth management plan and slope development ordinance
- n. Continue support of 441 Small Area Growth Management Plan and Ordinance
- o. Support new Homtex industry/jobs in former Stonewall Building
- p. Participate with neighboring counties and entire region to achieve resolution of Corridor K missing link

Town of Dillsboro:

- a. Annex and extend services to growth areas that may petition for annexation
- b. Continue development of recreation opportunities
- c. Greenway trail development
- d. Develop alternative parking
- e. Improve affordable housing availability
- k. Replace old water and sewer lines in cooperation with Tuckasee Water and Sewer Authority
- l. Complete development of Monteith Park
- m. Reinstate train service to Dillsboro (GSMR)

Village of Forest Hills:

- a. Plan for town growth and expansion of city limits, including protection provided by extra-territorial jurisdiction
- b. Work with Tuckasee Water and Sewer Authority to provide and extend water/sewer service in town
- c. Develop additional municipal services
- d. Continue greenway development

Town of Sylva:

- a. In cooperation with Tuckasee Water and Sewer Authority, extend services to growth corridors and unserved areas
- b. Develop/enhance further recreation opportunities
- c. Downtown revitalization, pedestrian improvements, and beautification
- d. Continue greenway development
- e. Continue revitalization of Mill Street commercial area
- f. Improve traffic patterns on Highway 107
- g. Complete Park Pavilion area adjacent to downtown
- h. Continue work with the Land Trust for the Little Tennessee on Pinnacle Park management

Town of Webster:

- a. Manage growth to keep non-commercial, residential life style
- b. Greenway development
- c. In cooperation with Tuckasee Water and Sewer Authority, extend services to growth corridors and unserved areas

Macon County:

- a. In cooperation with Towns of Franklin and Highlands, extend water/sewer to unserved areas and growth corridors
- b. Expand the new campus of Southwestern Community College on Siler Road
- c. Upgrade and maintain state of the art information technology and high technology training facilities at Macon County Center of Southwestern Community College
- d. Participate with neighboring counties and entire region to achieve resolution of Corridor K missing link

- e. Continue to improve greenways and trails systems
- f. Increase affordable housing availability
- g. Improve solid waste management and recycling systems
- h. Develop and expand multimodal transportation system including inter-county/interstate connections
- i. Manage development of commercial areas along Hwy 441 South
- j. Implement components of Blue Ridge National Heritage Tourism Plan

Town of Highlands:

- a. Continue with implementation of managed growth strategies
- b. Provide quality recreational and cultural activities for residents
- c. Protect town water supplies, including storm water management
- d. Provide water and sewer to un-served areas
- e. Improve parking and traffic circulation
- f. Participate in NC Dept of Commerce “Small Towns” Main Street program
- g. Prepare a Capital Improvement Plan, an asset management plan, and a Preliminary Engineering Report to determine the feasibility and costs of sewerage areas of Highlands that are not on the town's system. Only 25% of the town currently has public sewer service and there are numerous failing septic tanks. Nearly 85% of septic permits are issued under provisionally suitable conditions.

Town of Franklin:

- a. Upgrade and expand water and wastewater treatment plants, to include new sludge digester at wastewater treatment plant
- b. Extend water/sewer service to designated growth corridors.
- c. Downtown revitalization, pedestrian improvements, and beautification
- d. Continue greenway development
- e. Implement Main Street plan
- f. Increase affordable housing availability
- g. Implement NC STEP (Small Town Economic Prosperity) program

Swain County:

- a. Implement components of Swain Heritage Tourism Plan as also identified in Blue Ridge National Heritage Area Tourism Plan
- b. Develop a heritage museum at the Old Courthouse in cooperation with the National Park Service
- c. Further develop recreation facilities and programs

- d. Upgrade and maintain state of the art information technology and high technology training facilities at Swain County Center of Southwestern Community College
- e. Continue efforts to relocate / complete Swain Center of Southwestern Community College to new, better located and more useable facility closer to Bryson City
- f. Participate with neighboring counties and entire region to achieve resolution of Corridor K missing link
- g. Develop greenways and trails systems
- h. Build, develop and market IT spec building to take advantage of new high-speed internet in the county
- i. Increase affordable housing availability
- j. Develop additional public parking
- k. In cooperation with the Town of Bryson City, extend water and sewer lines into growth areas outside town limits
- l. Participate (with Bryson City) in western cluster of NC STEP (Small Town Economic Prosperity) program
- m. Improve downtown parking options

Town of Bryson City:

- a. Improve infrastructure within city limits
- b. Downtown revitalization, pedestrian improvements, and beautification
- c. Greenway development, implementation of the Comprehensive Transportation Plan
- d. Develop additional public parking
- e. Participate (with Swain County) in western cluster of NC STEP (Small Town Economic Prosperity) program
- f. Conduct a water system audit, and develop a water system map. The project also will develop a water system model. The town cannot account for approximately 47% of water loss and does not have a map of its water system.

Regional:

- a. Toolbox Implementation Fund – matching mini-grants to implement objectives
- b. Community Partnership for Older Adults
- c. Blue Ridge Natural Heritage Area development
- d. Extension of internet fiber optic ring: region-wide build-out of “last mile” broadband capacity
- e. Develop additional industrial product within Southwestern EDD, including certified sites
- g. Support MARC (Marketing Association for Rehabilitation Facilities, Inc.). MARC is a consortium of “vocational workshop” organizations which together employ approx. 1,500 WNC citizens, 90% of whom are physically and/or mentally challenged individuals. MARC serves 17 WNC counties
- h. Facilitate, moderate and /or mediate between and among various local governments, community leaders and non-profits toward implementation of cooperative local projects and programs (new jails, water and sewer)

- i. Promote growth in “Green Economy” and Clean Energy employment opportunities
- j. Develop an asset mapping framework of the region’s infrastructure assets
- k. Continue work with NC Dept of Agriculture and local land trusts to promote farmland preservation by increasing opportunities for products, jobs and income.

Action Plan - Comprehensive Economic Development Strategies

GOAL NUMBER ONE	BUILD ON THE REGION’S COMPETITIVE ADVANTAGE AND LEVERAGE THE MARKETPLACE
Objective 1	Identify the region’s clusters of economic development that offer competitive advantages

Strategies to Meet Objective

- Secure resources to expand on the recently completed cluster analysis performed for the 2012 CEDS
- Conduct a supply chain analysis focused on the sectors of hospitality, travel and tourism, light manufacturing and other emerging clusters

Lead Agency Partner

- AdvantageWest, NC Department of Commerce Tourism Division, county economic developers

Strategic Public/Private Partnerships

- Partnerships associated with competitive clusters to better understand supply chains
- Western Carolina University and Appalachian State University

Action(s)

- Conduct additional economic analysis with a focus on supply chains
- University led joint tourism study

Estimated Costs

- Pending required depth of study

Alignment of Resources

- NC and US Departments of Commerce, AdvantageWest, universities, private sector businesses

Barriers/Issues

- Staff resources for economic development planning limited

Performance Measures

- Completion of additional analysis to focus economic development efforts

Objective 2

Develop a regional plan to leverage the region's competitive advantages

Strategies to Meet Objective

- Develop marketing plans for primary sectors including tourism, education, technology, agriculture and light manufacturing
- Establish the Mountain West Alliance (marketing alliance)

Lead Agency Partner

- Western Carolina University; Haywood, Southwestern and Tri-County Community Colleges for education
- Mountain West Alliance for technology and manufacturing
- Smoky Mountain Host for tourism
- Land Trust for the Little Tennessee, WNC Regional Livestock Market, NC Department of Agriculture for agriculture and water quality

Strategic Public/Private Partnerships

- WNC Farmers Market in collaboration with large-scale and smaller boutique farms
- Machine manufacturing cluster
- BalsamWest Fiber Net

Action(s)

- Development of the following marketing plans: tourism and recreation, agriculture, technology and manufacturing

Estimated Costs

- Pending scope and level of advertising associated with implementation of the marketing plan

Alignment of Resources

- Primarily private sector driven

Barriers/Issues

- Funding/capacity to work with a range of private sector entities
- Localized competition, resistance to the regional vision
- Lack of advertising dollars

Performance Measures

- Completion of the primary marketing plans
- Job and general economic growth in associated sectors

Objective 3

Identify new adaptive capabilities of the regional economy

Strategies to Meet Objective

- Study the market potential of the emerging/re-emerging sectors including: agricultural/production crops/local food networks, recreation and tourism, viticulture

Lead Agency Partner

- NC Department of Agriculture, Land Trust for the Little Tennessee

Action(s)

- Conduct a slaughterhouse feasibility study for the region
- Conduct a local foods supply and market potential analysis
- Promote farmers markets
- Support create buy local campaigns

Estimated Costs

- Pending required depth of study

Alignment of Resources

- NC Department of Agriculture, Community Foundation, Cherokee Preservation Foundation

Barriers/Issues

- Coordination among agricultural partners
- Farmer independence

Performance Measures

- New agricultural jobs
- Population health statistics
- Acres of increased agriculture production
- Acres of increased agriculture conservation

GOAL NUMBER TWO	ESTABLISH & MAINTAIN A ROBUST REGIONAL INFRASTRUCTURE
Objective 1	Identify the region’s infrastructure assets (transportation, workforce, water/sewer/gas, broadband, housing, education, healthcare, green space, access to capital and energy assets)

Strategies to Meet Objective

- Ensure that continuously updated geographic location & service availability maps, diagrams and capacity attributes are digitally available to all parties who have a need to know.
- Promote and ensure consistencies among data partners
- More strategic expansions of infrastructure by coordinating land use and infrastructure planning

Lead Agency Partner

- Water and sewer system owners (municipalities, water & sewer authorities, county water & sewer districts and sanitary districts); NC permitting and regulatory agencies; professional engineers; PSNC Gas Co, Toccoa Natural Gas Co, NC Public Utilities Commission, District’s local governments
- Counties and municipalities

Strategic Public/Private Partnerships

- Utility providers, Southwestern Commission, District's local governments

Action(s)

- Create and continuously update Capital Improvements Plans for infrastructure
- Create and continuously update GIS based maps of water, sewer, gas, broadband, housing, etc. infrastructure, including age, state-of-repair and capacity
- Maintain current understanding of available public sector resources (e.g. water and sewer grants & loans *and* NC's fund for areas unserved by natural gas)
- Maintain membership in professional assistance and trade organizations for unbiased counsel and guidance (NC Rural Water Association, NC League of Municipalities, Southwestern Commission)
- Communicate regularly with system users (e.g. newsletters enclosed with monthly bills)
- Promote the abundant green energy and building investments in the region

Estimated Costs

- Must be calculated on a case-by-case basis

Alignment of Resources

- Western Carolina University GIS programs/internships, Southwestern Commission, engineering firms and utility systems
- AdvantageWest

Barriers/Issues

- Declining state and federal grant funds
- Insufficient long range planning
- County GIS capacities

Performance Measures

- Percent of infrastructure assets data mapped in a regional geodatabase
- Systems will maintain sufficient capacity to meet current and future demands
- Systems will meet / exceed standards required by State of NC and will earn no less than "acceptable" ratings from state inspectors

Objective 2

Develop multi-modal transportation plans that address existing and future year capacity deficiencies

Strategies to Meet Objective

- Continue to strengthen the partnership with NCDOT Transportation Planning Branch (TPB) and the Southwestern Rural Planning Organization (SWRPO) to create and update Comprehensive Transportation Plans (CTPs)
- Partner with NCDOT to produce a regional transportation plan upon completion of all individual county/municipal CTPs

Lead Agency Partner

- NCDOT TPB, Southwestern RPO, local governments within the SWRPO
- Neighboring DOTs (Tennessee, Georgia, Virginia, South Carolina)

Strategic Public/Private Partnerships

- Businesses with transportation needs

Action(s)

- Collaborative planning efforts with NCDOT TPB led by the SWRPO

Estimated Costs

- Must be calculated on a case-by-case basis

Alignment of Resources

- NCDOT Rural Planning Organization funding stream

Barriers/Issues

- Staff resources at NCDOT TPB and the SWRPO

Performance Measures

- Percent completed county/municipal CTPs
- Completion of the regional CTP

Objective 3

Identify whether water, sewer, and natural gas infrastructure can accommodate future growth

Strategies to Meet Objective

- Ensure that continuously updated geographic location & service availability maps, diagrams and capacity attributes are digitally available to all parties who have a need to know.
- More strategic expansions of infrastructure by coordinating land use and infrastructure planning
- *In the case of natural gas, service line & equipment location maps are generally proprietary and require a level of security that does not allow for public viewing. When site specific gas service availability information is required contact must be made with the respective gas company. It is therefore important to build professional contacts and relationships with natural gas providers in the district sufficient to maintain a mutual level of understanding about future expansion needs, plans...*

Lead Agency Partner

- Water and sewer system owners (municipalities, water & sewer authorities, county water & sewer districts and sanitary districts); NC permitting and regulatory agencies; professional engineers; PSNC Gas Co, Toccoa Natural Gas Co, NC Public Utilities Commission, Southwestern Commission, District's local governments

Strategic Public/Private Partnerships

- Many desired & needed water and sewer service provisions and /or extensions cannot be justified using “net present worth” & standard “return-on-investment” models. Given the steep decline in public grant funds, the now common practice is for the beneficiary user to cover the portion of project costs that can't be justified on a standard business model. These situations require the developer to partner with the respective local government or sanitary district through sharing of project costs.

Action(s)

- Coordinated land use and infrastructure improvement planning
- Create and continuously update Capital Improvements Plans for water and sewer infrastructure
- Create and continuously update GIS based maps of water and sewer infrastructure, including age, state-of-repair and capacity
- Maintain a professional management team for each local system
- Maintain current understanding of available public sector resources (e.g. water and sewer grants & loans *and* NC's fund for areas unserved by natural gas)
- Maintain membership in professional assistance and trade organizations for unbiased counsel and guidance (NC Rural Water Association, NC League of Municipalities, Southwestern Commission)
- Communicate regularly with system users (e.g. newsletters enclosed with monthly bills)

Estimated Costs

- Must be calculated on a case-by-case basis

Alignment of Resources

- Must be calculated on a case-by-case basis

Barriers/Issues

- Declining state and federal grant funds
- Shortage of local financial resources
- Insufficient long range planning
- Inadequate capital reserves for system upgrades
- Challenge of establishing user rates sufficient to cover current costs and fund capital reserves

Performance Measures

- Systems will maintain sufficient capacity to meet current and future demands
- Systems will meet / exceed standards required by State of NC and will earn no less than "acceptable" ratings from state inspectors
- Capital reserves will be sufficient to renovate/build/expand when the regulation- specified 80% capacity level is reached
- Annual, independent, financial & compliance audits will be free of material findings
- No raw sewage, sludge or chemical spills will occur

Objective 4

Develop plans for the expansion of telecommunications and broadband infrastructure growth or identify their capacity is sufficient

Strategies to Meet Objective

- 100% of the transport (middle mile) infrastructure and almost the entire last mile infrastructure in the District is privately owned. Therefore, plans for expansion and growth clearly fall under the authority and responsibility of the private sector owners / managers. With these realities in mind it is obviously essential to:
- Maintain close professional relationships with the private sector owners and managers of telecommunications and broadband infrastructure
- Regularly conference with these infrastructure owners / managers with the objectives of: (1) understanding the owners'/managers' short and long range plans; (2) ensuring that the

owners/managers are aware of pressing local and regional desires & needs for improvement & expansion of service; and (3) assisting with the structure of deals that require some “below-the-line” public financing

Lead Agency Partner

- Frontier Communications, Balsam West FiberNet LLC, Verizon Wireless, NC Public Utilities Commission, Local Governments
- NC Department of Commerce

Strategic Public/Private Partnerships

- The District organization (the Southwestern Commission) has a substantial history of helping to facilitate partnerships between the public sector and the District’s telecommunications sector. Examples are Community Link, the WNC Knowledge Coalition, WNC EdNet , and Balsam West FiberNet LLC. Going forward public / private partnerships remain the only viable method of extending and expanding more robust broadband services into areas where standard cost benefit models won’t work.

Action(s)

- Coordinated land use and infrastructure improvement planning
- Schedule regular conferences with District’s telecommunications companies
- Maintain regular contact with District’s county managers and economic development directors for purpose of understanding their respective area’s most pressing, highest priority unmet telecommunications needs
- Maintain current understanding of available public sector resources (e.g. grants and loans) for telecommunications improvements

Estimated Costs

- Must be calculated on a case-by-case basis

Alignment of Resources

- Must be arranged on a case-by-case basis

Barriers/Issues

- Declining state and federal grant funds
- Shortage of local financial resources
- Company’s financial inability or unwillingness to make locally desired / needed investments in last mile infrastructure
- Failure to maintain productive relationships with company owners / managers

Performance Measures

- Private companies are able to meet business plan objectives while concurrently expanding services to unserved or underserved areas
- Entrepreneurs, privately held businesses and publicly traded companies that are dependent on world-class broadband infrastructure make more job-producing investments in the District

Strategies to Meet Objective

- Conduct a housing analysis for the district to get a better understanding of the diversity of housing stocks
- Work with developers, and local government planners to develop incentives for the diversification of housing stocks
- Maintain existing housing stocks by reinvesting in our existing communities
- Coordinated land use planning

Lead Agency Partner

- County governments, tax assessors and planners

Strategic Public/Private Partnerships

- Private developers, county governments, advocacy groups
- Faith based organizations for example the Hinton Life Center
- Volunteer groups and private developer partnerships to reduce labor costs for housing construction programs

Action(s)

- Coordination and production of housing analysis for the district

Estimated Costs

- Pending the required depth of the analysis

Alignment of Resources

- US Department of Housing and Urban Development

Barriers/ Issues

- Community perceptions of affordable or workforce housing
- Resources in the current economic climate

Performance Measures

- Completion of housing analysis and associated strategies for diversification
- Addition of workforce housing in the district

GOAL NUMBER THREE

CREATE REVITALIZED & VIBRANT COMMUNITIES

Objective 1

Promote environmentally sustainable development patterns

Strategies to Meet Objective

- Robust geographic/environmental datasets for counties and towns to make informed decisions
- Land use planning; ordinance adoption and implementation
- Convey the economic importance of environmental protection through long-term cost benefit analysis

Lead Agency Partner

- Local governments (counties and municipalities)

Strategic Public/Private Partnerships

- Non-profit environmental organizations such as land trusts, watershed associations/coalitions, and other community groups

Action(s)

- Data collection/production/dissemination
- Planning efforts
- Storm water management planning and implementation
- Adoption of land use policies that promote long term economic growth and viability

Estimated Costs

- Costs associated with planning for development are incurred by local governments, and are often subsidized by grant funding
- Implementation costs on a project by project basis

Alignment of Resources

- Multi-agency collaboration ensures that local governments are connected with available resources
- Private sector partnerships

Barriers/Issues

- Desire/need for economic growth at any cost (short-term)
- Lack of understanding or concern for the cost benefit associated with the protection of natural resources

Performance Measures

- Water quality, air quality, increased environmental datasets
- Increase in tourism numbers, visits and dollars

Objective 2

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

Strategies to Meet Objective

- Robust public input efforts including research targeted outreach to underrepresented communities
- Mapping of target populations

Lead Agency Partner

- Local governments (counties and municipalities) and the SWRPO

Strategic Public/Private Partnerships

- Churches, community groups, CRCs, Western Carolina University

Action(s)

- Analysis and outreach of underserved and minority populations

Estimated Costs

- Unsure

Alignment of Resources

- US Department of Housing and Urban Development

Barriers/Issues

- Communication with non-English speaking populations, transportation to public events for low-income residents

Performance Measures

- Number of participants from target populations
- Geographic products of target populations

Objective 3

Develop a plan for accelerating investments in healthy, safe, and walk able neighborhoods

Strategies to Meet Objective

- Develop pedestrian plans, community watch programs, and promote the senior-friendly communities initiative
- Implement Complete Streets policies
- Greenway planning and implementation

Lead Agency Partner

- Local governments, senior centers, county health departments, Area Agency on Aging

Strategic Public/Private Partnerships

- NCDOT, Rural Planning Organization, bike and running clubs, health departments, police departments

Action(s)

- Create and adopt bike and pedestrian plans, fill in missing links in popular walking and running loops, conduct Community Health Assessments

Estimated Costs

- Infrastructure costs associated with this objective to construct sidewalks

Alignment of Resources

- Powell Bill Funds, NCDOT
- Local funds (counties and municipalities)

Barriers/ Issues

- Lack of funds for pedestrian infrastructure

Performance Measures

- Miles of new sidewalks, greenways and bike lanes

Lead Agency Partner

- The Southwestern Workforce Development Board (SWDB) oversees and coordinates workforce development efforts in the region. Workforce Development Boards are authorized under the federal Workforce Investment Act (WIA), which also funds WIA activities. In the Southwestern region, WIA funds and activities are administered by district staff.

Strategic Public/Private Partnerships

- Local public and private secondary schools, Community Colleges (Haywood Community College, Southwestern Community College, and Tri-County Community College), One-Stop Career Centers, Local Economic Development Commissions, NC Department of Commerce, AdvantageWest

Action(s)

- The SWDB directs contracted Workforce Investment Act service providers to tailor the majority of training efforts to those industries and occupations in our region that are predicted to have high growth. This includes occupations in the Health Care Industry, advanced manufacturing, building trades, computer technologies, food service technology, and human services/social services.
- The SWDB oversees the WIA Youth Services, which provide technical and financial assistance to youth to help them obtain a high school diploma, a GED, advanced educational degrees, or occupational skills training.
- The SWDB oversees the WIA Adult and Dislocated Worker program, which provides career assessment, training assistance, and job search/retention assistance to eligible Adults and Dislocated Workers in the region.

Estimated Costs

- Unknown

Alignment of Resources

- The Southwestern Workforce Development Board is made up of representatives from the private sector and workforce development partners in our region. Fifty-one percent of the board members are from the private industry. Other representation includes: economic development, education, vocational rehabilitation, community based organizations, labor, public service employment, and public assistance.

Barriers/Issues

- Loss of manufacturing jobs in the region (in 1990 the annual average employment in manufacturing was 11,844, in 2011 the annual average employment in manufacturing was 4,821) a loss of 7,023 manufacturing jobs
- Limited job opportunities given the current economic conditions. Many available jobs are part-time with little or no benefits
- High Unemployment rates (above the state and national rates)
- High percentage of population over 65 (projected to reach 24% of the region's population by 2018)
- Lack of industries/employers in our area that recognize or request Career Readiness Certification as part of their screening process in finding/hiring qualified applicants.
- Difficulty with segments of the labor force being unable to pass drug screening required by most employers

Performance Measures

- Number of Career Readiness Certificates issued
- Decrease in the High School Drop-Out Rate
- Job Retention Rate

Objective 2

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

Strategies to Meet Objective

- The Youth Council, a sub group of the Workforce Development Board, is currently working on mapping all regional resources for youth including educational. Once they have identified and analyzed all educational resources we can determine if a gap analysis is needed.

Lead Agency Partner

- The Southwestern Workforce Development Board Youth Council

Strategic Public/Private Partnerships

- Private and Public secondary schools, Community Colleges (Haywood Community College, Southwestern Community College, and Tri-County Community College, Western Carolina University, Oconaluftee Job Corps Center, LBJ Job Corps Center

Action(s)

- The Youth Council has elected a committee to work on the resource mapping.

Estimated Costs

- Minimal

Alignment of Resources

- The Southwestern Workforce Development Board Youth Council is comprised of representatives of education agencies , youth service providers, HUD, Job Corps Centers

Barriers/Issues

- Unknown

Performance Measures

- Completion of resource mapping of educational resources and gap analysis

Objective 3

Develop ways to create an environment that fosters entrepreneurial development and growth

Strategies to Meet Objective

- Encourage counties to participate in the AdvantageWest Certified Entrepreneurial Community initiative

- Provide space and forums for entrepreneur networking

Lead Agency Partner

- AdvantageWest, local governments

Strategic Public/Private Partnerships

- Existing entrepreneurial networks, AdvantageWest
- Western Carolina University and community colleges

Action(s)

- Engage in the CEC initiative

Estimated Costs

- Minimal

Alignment of Resources

- AdvantageWest entrepreneurial program

Barriers/ Issues

- Limited marketing dollars for communities that become certified

Performance Measures

- Percent certified counties in the district

Community Survey Results

The community survey was developed under leadership of the strategy committee. The committee indicated uncomfortable with a 70% public participation rate, suggesting new strategies should be employed to reach a more diverse population. It was suggested that the EDD partner with Western Carolina Universities Public Policy Institute to get a more diverse response in the future,

TOP 10 ECONOMIC DEVELOPMENT ISSUES

RANK	ISSUE	RESPONSES
1	Access to health care services	175
2	Protecting water quality	167
3	Broadband/high-speed internet infrastructure & access	156
4	Promotion of disease protection & health & wellness attitudes	143
5	Effective work habits & attitudes	140
6	Access to in-home health care providers	140
7	Protecting air quality	136
8	Protecting mountain ridges & steep slopes	133
9	Availability of qualified workers	130
10	Availability of high paying jobs	125

BUSINESS AND ECONOMIC DEVELOPMENT SECTORS

Please rate the following issues on their importance, taking into consideration the following:

- Is the issue regionally significant? (important to more than one jurisdiction)
- Is the issue economically important? (Will it affect our future economy?)
- DOES THE ISSUE NEED MORE ATTENTION IN THE NEXT FIVE YEARS?
RECRUITING, JOB RETENTION AND EXPANDING SUPPORT FOR THE
FOLLOWING TYPES OF BUSINESSES:

	Very Important	Important	Somewhat Important	Not Important	No Opinion	Response Count
Agriculture and agricultural products	81	82	38	5	1	207
Manufacturing	81	80	38	5	1	205
Arts, crafts and music	40	81	71	12	1	205
Biotechnology and medical research	50	73	57	17	5	202
Communications technology	94	84	23	4	0	205
Construction	81	71	47	6	0	205
Education/ Educational Services	138	58	9	0	0	205
Energy	103	66	33	0	2	204
Small business	141	53	12	0	0	206
Health care	152	45	6	4	0	207
Non-profit sector	51	60	70	12	5	198
Professional services	24	85	71	20	2	202
Services related to the retired and older adult population	97	80	25	2	1	205
Technology	105	68	29	2	0	204
Tourism	120	52	27	6	1	206
Answered Question						208
Skipped Question						1

Top 5 Business Sectors: Health Care, Small Business Education/Educational Services, Tourism, and Technology

Majority of the comments in regards to the region's economic development sectors pertained to diversifying the economy and creating "real" jobs; especially outside of the tourism industry. Many felt that the jobs available in the region were not sufficient enough in helping low-income families earn a living wage. Some suggestions were to increase regional focus on the agriculture and education sectors, as well as job training and recruitment efforts in the information/bio-technology sectors.

BUSINESS AND ECONOMIC DEVELOPMENT ISSUES

Please rate the following issues on their importance, taking into consideration the following:

- Is the issue regionally significant? (important to more than one jurisdiction)
- Is the issue economically important? (Will it affect our future economy?)
- DOES THE ISSUE NEED MORE ATTENTION IN THE NEXT FIVE YEARS?

	Very Important	Important	Somewhat Important	Not Important	No Opinion	Response Count
Access to capital	101	76	20	2	4	203
Competitiveness with other regions in North Carolina	97	75	28	4	1	205
Competitiveness with other regions in the Southeast	94	72	33	5	1	205
Cost of employer-provided benefits, including health care	115	74	11	3	3	206
Exodus of traditional industries	80	65	41	12	5	203
Global competitiveness	52	72	57	19	3	203
New incentives for businesses	96	75	29	3	2	205
Revitalization and re-utilization of idle and/or underutilized properties	103	71	26	3	4	207
Support for working farms and forests	105	67	22	6	4	204
Answered Question						208
Skipped Question						1

Top 5 Business and Economic Development Issues: Cost of Employer-provided benefits, including health care, support for working farms and forests, revitalization and re-utilization of idle and/or underutilized properties, access to capital, and competitiveness with other regions of North Carolina

Survey comments expressed a desire for the region to apply for more grant money, given the fact that majority of the land within the region is not taxable. Stopping the youth “brain-drain” in the region was another economic development issue mentioned by respondents. Entry-level jobs are becoming available in the region, but there is not a suitable workforce available. Alongside finding a way to prevent the youth exodus, a suggestion was made to create a retirement-based service, geared towards attracting more retirees to the region (Givens Estates (Asheville), Tryon Estates (Columbus, NC), and Deerfield (Asheville)).

WORKFORCE

Please rate the following issues on their importance, taking into consideration the following:

- Is the issue regionally significant? (important to more than one jurisdiction)
- Is the issue economically important? (Will it affect our future economy?)
- DOES THE ISSUE NEED MORE ATTENTION IN THE NEXT FIVE YEARS?

	Very Important	Important	Somewhat Important	Not Important	No Opinion	Response Count
Availability of adult care services	97	80	18	6	4	205
Availability of child care services	111	78	11	2	3	205
Availability of qualified workers	130	63	9	1	3	206
Availability of housing	91	75	33	4	2	205
Availability of affordable housing	123	61	16	2	1	203
Availability of high-paying jobs (both full-time and part-time)	125	66	11	5	0	207
Availability of seasonal agricultural workers	34	87	62	17	5	205
Availability of multilingual communication in the workplace	25	72	77	27	4	205
Availability of entry-level jobs	73	88	39	3	0	203
Effective work habits and attitudes	140	53	9	1	2	205
Answered Question						207
Skipped Question						2

Top 5 Workforce Related Issues: Effective work habits, Availability of qualified workers, availability of high-paying jobs, Availability of affordable housing, and availability of childcare services

Poor work habits of locals(especially within the manufacturing sector), employment opportunities for new college graduates, and availability of child care for young residents are some issues respondents believe are diminishing the quality of the regions workforce. Also, many respondents feel that job training is desperately needed for many residents. The comments of other respondents echoed the sentiment that illegal-immigrants within the region are taking jobs from locals and exhausting local educational resources.

INFRASTRUCTURE

Please rate the following issues on their importance, taking into consideration the following:

- Is the issue regionally significant? (important to more than one jurisdiction)
- Is the issue economically important? (Will it affect our future economy?)
- DOES THE ISSUE NEED MORE ATTENTION IN THE NEXT FIVE YEARS?

	Very Important	Important	Somewhat Important	Not Important	No Opinion	Response Count
Adequacy and accessibility of LOCAL public transportation services	84	80	33	9	0	206
Adequacy and accessibility of REGIONAL public transportation services	70	86	40	11	0	207
Adequacy and accessibility of sidewalks, trails and bike paths	70	87	44	7	0	208
Adequacy of LOCAL streets and roads	89	92	26	1	0	208
Adequacy and accessibility of Airport passenger service	28	66	69	39	5	207
Adequacy and accessibility of freight railroad service	27	68	56	44	12	207
Adequacy and accessibility of freight air service	15	63	70	41	15	204
Adequacy and availability of public water systems	117	66	20	4	2	209
Adequacy and availability of public sewer systems	115	66	21	4	2	208
Adequacy of recycling systems	94	74	32	6	0	206
Adequacy of solid waste systems	101	80	22	1	2	206
Broadband/high-speed internet infrastructure and access	156	41	10	0	0	207
Connectivity of transportation systems	55	58	63	29	1	206
Passenger rail service in Western North Carolina	37	53	61	42	9	202
Traffic congestion - Local roads	44	80	51	27	4	206
Traffic congestion - Interstate	30	80	55	34	5	204
Answered Question						209
Skipped Question						0

Top 5 Infrastructure Issues: Broadband/high-speed internet infrastructure and access, availability of public water systems, availability of public sewer systems, adequacy of solid waste systems, and adequacy of recycling systems.

According to several respondents, increasing the availability of high-speed internet throughout the region is essential in attracting more residents and businesses to the region. Highway transportation is another issue that survey respondents feel needs to be addressed; especially the completion of Corridor K.

GROWTH PLANNING AND MANAGEMENT

Please rate the following issues on their importance, taking into consideration the following:

- Is the issue regionally significant? (important to more than one jurisdiction)
- Is the issue economically important? (Will it affect our future economy?)
- DOES THE ISSUE NEED MORE ATTENTION IN THE NEXT FIVE YEARS?

	Very Important	Important	Somewhat Important	Not Important	No Opinion	Response Count
Active local government role in managing growth	105	70	22	8	0	205
Active community participation in economic development planning	119	68	20	1	0	208
Adequacy of community emergency preparedness	100	74	28	4	0	206
Availability of accurate mapping and Geographic Information Systems data	75	89	31	6	3	204
Availability of mixed-income housing communities	52	79	42	22	11	206
Availability of housing near employment centers	57	82	48	16	5	208
Availability of mixed-use development regulations	49	72	55	14	13	203
Encouraging regional coordination of growth issues and strategies	75	81	35	11	4	206
Encouraging reuse of abandoned or underutilized sites	98	63	34	7	4	206
Answered Question						209
Skipped Question						0

Top 5 Growth Planning Issues: Active community participation in economic development planning, active local government role in managing growth, adequacy of community emergency preparedness, and encourage reuse of abandoned or underutilized sites.

Although zoning is widely believed to be unfavorable throughout the region, several respondents expressed their support for regulating growth within the region.

SOCIAL/CULTURAL

Please rate the following issues on their importance, taking into consideration the following:

- Is the issue regionally significant? (important to more than one jurisdiction)
- Is the issue economically important? (Will it affect our future economy?)
- DOES THE ISSUE NEED MORE ATTENTION IN THE NEXT FIVE YEARS?

	Very Important	Important	Somewhat Important	Not Important	No Opinion	Response Count
Investing in and protecting historical, cultural, and "sense of place" assets.	112	65	26	6	0	209
Maintaining availability and accessibility of community/senior centers	98	80	22	6	2	208
Planning for the growing older adult population	114	71	18	4	1	208
Supporting opportunities for civic engagement and volunteering	89	83	26	8	2	208
Valuing and respecting diversity	100	61	34	8	4	207
Answered Question						209
Skipped Question						0

Top 5 Social Issues: Planning for the aging adult population, investing in and protecting historical/cultural, & “sense of place” assets, valuing and respecting diversity, and maintaining availability & accessibility of community/senior centers

Outside of Caucasians, American Indians, and Hispanics, respondents see the region as lacking the ethnic diversity present in other regions throughout North Carolina. Also, respondents expressed that the region’s senior population must continue to be a priority.

HEALTHCARE

Please rate the following issues on their importance, taking into consideration the following:

- Is the issue regionally significant? (important to more than one jurisdiction)
- Is the issue economically important? (Will it affect our future economy?)
- DOES THE ISSUE NEED MORE ATTENTION IN THE NEXT FIVE YEARS?

	Very Important	Important	Somewhat Important	Not Important	No Opinion	Response Count
Access to health care services	175	26	5	3	0	209
Access to mental health services	140	47	15	4	1	207

Access to in-home health care providers	140	47	13	4	4	208
Promotion of disease prevention and health and wellness activities	143	51	12	2	0	208
Answered Question						209
Skipped Question						0

Top 5 Health Care Issues: Access to health care, promotion of disease prevention and health and wellness activities, access to in-home health care providers, and access to mental health

Health care is very accessible in a few areas throughout the region, but lacking in others. Respondents expressed the concern that locals were losing confidence in the health care system. The regions long-term mental health capacity is not fully equipped to meet the needs of residents. It was mentioned by a couple of respondents that prevention and wellness become a focus of health care providers.

ENERGY

Please rate the following issues on their importance, taking into consideration the following:

- Is the issue regionally significant? (important to more than one jurisdiction)
- Is the issue economically important? (Will it affect our future economy?)
- DOES THE ISSUE NEED MORE ATTENTION IN THE NEXT FIVE YEARS?

	Very Important	Important	Somewhat Important	Not Important	No Opinion	Response Count
Addressing climate change	65	64	48	28	1	206
Preserving and maintaining healthy ecosystems	107	75	21	3	1	207
Promoting outdoor recreation activities	104	79	24	2	0	209
Protection of farms and forests through redevelopment of idle/abandoned sites	115	65	25	1	2	208
Protecting air quality	136	59	12	1	0	208
Protecting mountain ridges and steep slopes	133	52	19	3	0	207
Protecting water quality and quantity	167	37	4	0	0	208
Developing renewable energy resources	123	56	21	8	0	208
Ensuring energy supply infrastructure (i.e., fuel reserves/sources and peak power generation)	104	75	18	4	3	204

Managing energy and fuel costs	124	67	13	3	0	207
Planning for impacts of future energy disruptions	106	77	19	4	2	208
Supporting energy conservation	115	67	19	5	0	206
Supporting energy-efficient building practices	117	65	18	6	1	207
Answered Question						209
Skipped Question						0

Top 5 Energy Issues: Protecting water quality, protecting air quality, protecting mountain ridges and steep slopes, managing energy and fuel costs, and developing renewable energy sources.

Respondents viewed these questions as a “double-edged sword”. Some suggested that long-term planning and strict regulation would aid in alleviating the region’s energy issues. However, others saw increased energy regulations as a burden on low-income families and local businesses.

EDUCATION

Please rate the following issues on their importance, taking into consideration the following:

- Is the issue regionally significant? (important to more than one jurisdiction)
- Is the issue economically important? (Will it affect our future economy?)
- DOES THE ISSUE NEED MORE ATTENTION IN THE NEXT FIVE YEARS?

	Very Important	Important	Somewhat Important	Not Important	No Opinion	Response Count
Competitive teacher salaries	120	68	13	4	1	206
High school drop-out rate	120	71	14	1	1	207
Student access and affordability of post-secondary education	119	72	14	2	1	208
Narrowing the K-12 achievement gap	98	75	20	3	10	206
Student population growth outpacing school capital improvement resources	88	80	31	3	6	208
Participation of underserved and underachieving population segments	85	79	32	5	6	207
Coordination between community colleges and public universities	100	75	27	5	1	208
Availability of life-long learning opportunities	92	80	29	4	2	207

Answered Question	208
Skipped Question	1

Top 5 Education Issues: Competitive teacher salaries, high school dropout rate, Student access & affordability of post-secondary education, Coordination between community colleges and public universities

Respondents viewed education as the foundation for improving the region’s workforce. The opinions about the local school systems varied from extremely satisfied to disgust. Disgruntled respondents blamed budget cuts for the decreased quality in their school system. One respondent suggested a return to community schools, less government interference in the classroom, and character building (teaching manners, penmanship, earning rewards).

How do you feel about growth and change (size, population, commercial activity, growth in government, traffic or any way you want to define growth) throughout the region?

	Very Positive	Somewhat Positive	Neutral	Somewhat Negative	Very Negative	Response Count
General feelings about growth	54	91	37	23	4	209
Commercial growth	46	92	35	30	5	208
Residential growth	39	88	48	26	5	206
Industrial growth	48	62	44	39	11	204
Answered Question						209
Skipped Question						0

Despite the lack of land, commercial and industrial growth is viewed in a positive light throughout the region. However, local residents tend to rate outside migration as negative. Respondents feel that planning is needed to control growth in the region.

What is your rating of the general economy of the region?

	Excellent	Very Good	Moderate	Poor	Very Poor	Extremely Bad	Response Count
Image of the region as a place to live	60	79	45	16	5	3	208
Effective government leadership	7	43	95	44	12	6	207
Strong business growth	4	21	84	82	12	5	208
Location for high tech activity	14	30	67	73	14	8	206
Answered Question							209
Skipped Question							0

Respondents view the region as a wonderful place to live and raise a family. Industry is lacking greatly in some areas. Change is not widely accepted in the region. Many respondents expressed their disdain for the “good ole’ boy” politics that take place.