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Future Forward Vision & Strategies August 2003

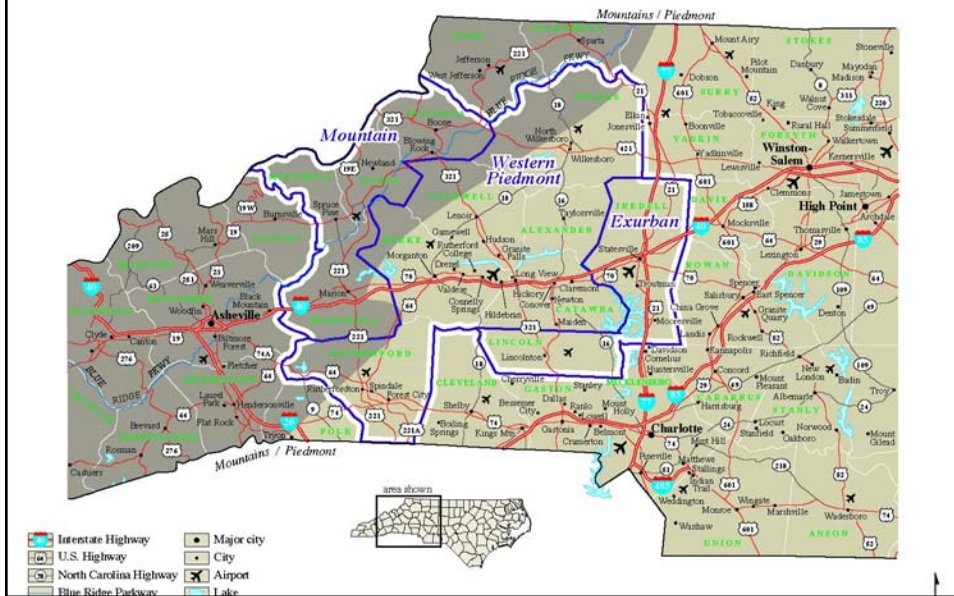
Future Forward

- Deliberations of 21 member committee appointed by Congressman Cass Ballenger (representing 12 counties)
- Help from national team of experts
- One-on-one and focus group interviews (more than 150 people)
- Input from 10 community workshops (nearly 400 participants)
 - ✓ Boone (twice)
 - ✓ Hickory (twice)
 - ✓ Lenoir
 - ✓ Statesville
 - ✓ Rutherfordton
 - ✓ Wilkesboro
 - ✓ Lincolnton
 - ✓ Morganton

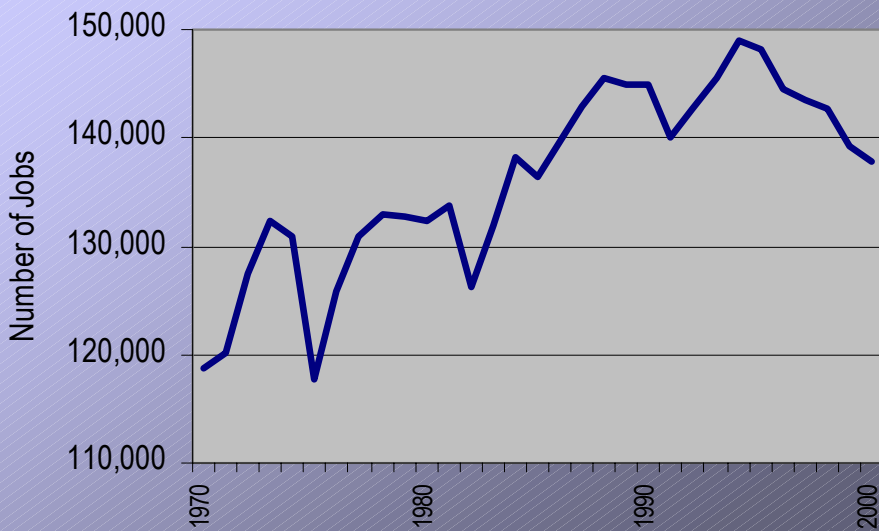


12-County "Future Forward" Strategic Initiative Region

Figure 1. The 10th and 11th Congressional Districts of North Carolina and Sub-Regions.



Regional Manufacturing Employment, 1970-2000



Manufacturing Employment, 1995-2001

Sector	Emp. 2001	Change 1995-01
Textile Mill Prod.	22,369	-16,064
Apparel	4,365	-3,022
Furniture & Fixtures	37,412	-3,093
Other Mfg	56,462	-2,413
All Mfg	120,608	-24,592

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Identifying Target Clusters for Economic Development

- **Clusters are Groups of Industries That Interact in Some Way**
 - ✓ Related by supply chains and/or customers
 - ✓ Often share labor pools
 - ✓ Depend on shared infrastructure and “institutions”
 - ✓ Compete and cooperate

Potential Target Clusters

- **Focus for Retention**
 - ✓ Fabricated Textiles
 - ✓ Apparel
 - ✓ Furniture & Wood Products
 - ✓ Motor Vehicles
 - ✓ Packaged Food Products
 - ✓ Primary Nonferrous Metals
- **Focus for Expansion**
 - ✓ Construction Materials
 - ✓ Metalworking & Industrial Machinery
 - ✓ Motor Vehicles
- **Focus on Emerging Clusters**
 - ✓ Printing & Publishing
 - ✓ Hospitals, Labs & Services
 - ✓ Travel/Tourism
 - ✓ Pharmaceuticals & Medical Technology
 - ✓ Chemicals & Plastics

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Service Sectors Supporting Manufacturing Clusters

- Computer programming services
- Prepackaged software
- Computer integrated systems design
- Data processing and preparation
- Information retrieval services
- Computer facilities management and repair
- Computer rental and leasing
- Computer maintenance and repair services
- Computer related services, nec
- Commercial physical research
- Commercial nonphysical research
- Test laboratories
- Engineering services
- Architectural services
- Surveying services

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Key Points

- **One-two punch**
 - ✓ Long-term decline
 - ✓ Cyclical vulnerability
- **Opportunities in expanding & emerging clusters**
- **Transition**
 - ✓ Too specialized in declining traditional industries
 - ✓ Jobs versus industry performance
 - ✓ Advanced manufacturing requires producer services
 - ✓ Need to prepare for emerging “new” economy dependent on knowledge

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Needs of These Service Industries: Knowledge Economy

- **High quality labor force =**
 - ✓ Technical skills
 - ✓ Post-secondary education opportunities
 - ✓ Broad-band telecom and air access
- **Quality of Life =**
 - ✓ Urban amenities –Charlotte and other metro locations; Hickory?
 - ✓ Natural resource environment – Mountains, lakes, etc.
- **Innovation**
 - ✓ Climate that tolerates and embraces risk-taking
 - ✓ Capital to invest in risk-taking activities
- **Scale**
 - ✓ Critical mass of activity to support “higher order” services and infrastructure assets

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Educational Attainment, 2000
Population 25 years or older

Area	Beyond H.S. Education (%)
Western Piedmont	37.0
Mountain	41.7
Suburban Charlotte	43.1
Total Region	39.4
NC	49.8
US	51.7

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Educational Attainment, 2000
Population 25 years or older

Area	4 year college degree (%)
Region	14.0
NC	23.0
US	24.0
Area	Without a high school diploma or equivalent (%)
Region	29.0
NC	22.0
US	20.0

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Future Forward will result in:

- **A region defined by...**
 - ✓ Skilled people – higher educational attainment, higher wages
 - ✓ Innovative firms – more productive, greater use of state-of-the-art technologies within new and existing firms
 - ✓ Economic diversity – more entrepreneurial activity and expansion of producer service sector
 - ✓ Cool places – increased amenities that attract young adults and active retirees
 - ✓ Smart governance – more regional coordination

The Region....

- **Encompasses an area roughly bounded by four recognized urban centers (Charlotte, Greensboro-Winston-Salem, Greenville-Spartanburg, & Asheville)**
- **Cultivates the region's local metropolitan and micropolitan economic and cultural assets**
- **Promotes nearby natural environment and outdoor amenities**

The Region....

- Values life-long learning
- Engages strategy and investments on a scale that achieves impacts across the area
- Embraces social/cultural diversity
- Builds an economy focused on:
 - ✓ Globally competitive advanced manufacturing
 - ✓ Manufacturing-related producer and distribution services
 - ✓ Growth of entrepreneurial enterprises
 - ✓ Expansion of selected service sectors:
 - ❖ Health care
 - ❖ Education
 - ❖ Retail
 - ❖ Tourism/leisure
 - ❖ Retirement industry

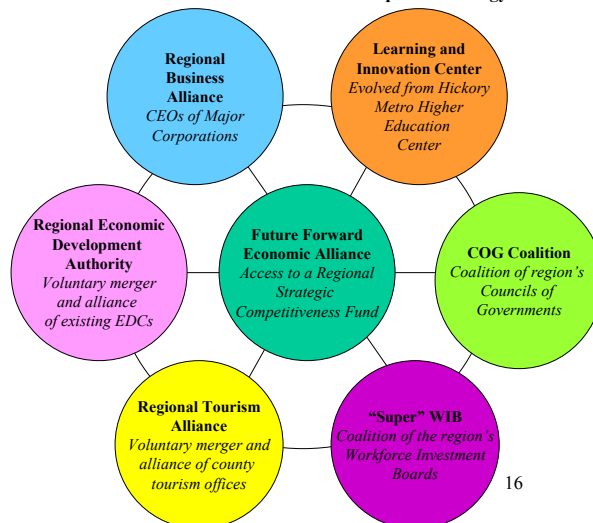
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Strategic Actions to Implement our Vision

➤ Collaborative Governance & Leadership

- ✓ Create a network of “Regional Alliances” to implement regional strategies built on existing organizations or strategic alliances of existing institutions.

Organizations & Alliances Required to Implement the Future Forward Economic Development Strategy



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Strategic Actions to Implement our Vision

- **Scale and Connectivity**
 - ✓ Identify transportation corridors as the main focus for future planned development (I-77, I-40, US221, US321, US421, NC 150, NC16, NC19E, NC226, US64/NC18)
 - ✓ Target infrastructure projects that occur along identified transportation corridors
 - ✓ Identify targeted infrastructure projects that tie the region together and improve its economic performance

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Strategic Actions to Implement our Vision

- **Work Force Prepared for 21st Century Work**
 - ✓ Conduct a campaign to increase local value of education among parents and young people
 - ✓ Develop an improved people-job matching information system that serves a multi-county region

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Strategic Actions to Implement our Vision

➤ Innovation and Entrepreneurship

- ✓ Establish a Learning & Innovation Network that provides programs and facilities required to foster technology-based economic development
 - ❖ Night courses designed to allow learners to work during the day and participate in evening and weekend classes
 - ❖ Special courses targeted to meet businesses needs
 - ❖ Encourage science and tech focus, such as engineering tracks
 - ❖ Promote collaborations between industry, research, and worker training programs, such as the Hosiery Center

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Strategic Actions to Implement our Vision

➤ Targeted Marketing & Development

- ✓ Conduct a market research study to follow up the Future Forward Economic Situation Analysis to identify specific firms
- ✓ Promote a “mega-development” project as a regional tourism/retail destination
- ✓ Promote development of a “high-end” technology park associated with the Learning and Innovation Network

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Strategic Actions to Implement our Vision

- **“Connected and Creative” Living**
 - ✓ Establish a regional taskforce for encouraging planned development and strategic outdoor amenities, heritage and cultural assets and principles for municipal and county action along targeted development corridors

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Benefits to Your County

- **Current Activities**
 - ✓ Critical Infrastructure Projects Identification
 - ✓ Formation of Business Roundtable
 - ❖ Expressed interest to promote Future Forward Plan
 - ✓ People-Jobs Matching System
 - ❖ Regional job database and matching system
 - ❖ Pilot program to be completed by August 2003
 - ❖ State funding of 90%
 - ❖ Access at One-Stop Career Centers and Partner Institutions

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Benefits to Your County

➤ Future Benefits

- ✓ Eligibility for EDA funding
- ✓ Market Research Study
- ✓ Regional Infrastructure Projects
- ✓ Foothills Tourism Alliance
- ✓ Collaboration by Economic Agencies
- ✓ Mega-retail/mega-industrial site development

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Next Steps

- Obtain approval by counties/cities
- Finalize Plan
- Establish Future Forward Economic Alliance
- Implement Plan

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