

**PROSPERITY FOR GREATER CHARLOTTE PROJECT
CONNECT OUR FUTURE**

**Mecklenburg County
Board of Commissioners Meeting**

February 19, 2013



Vibrant Communities – Robust Region



Today's Presenter

Michael Manis, CEcD

Director, CCOG Community and Economic Development

President & COO, Centralina Economic Development Commission

Project Sponsors:



Vibrant Communities – Robust Region





PROSPERITY FOR GREATER CHARLOTTE

2012 ~ 2017

Economic Strategic Assessment for the Greater Charlotte Region

Including the;

Centralina EDD Comprehensive Economic Development Strategy

And

Catawba Regional COG Comprehensive Economic Development Strategy





Executive Summary:

Prosperity for Greater Charlotte

An initiative to align the region's economic, workforce, and education efforts to boost prosperity in the 21st Century

The initiative was sponsored by:



Vibrant Communities—Robust Region

The project was assisted by the consulting team of Avalanche Consulting, the Council for Adult & Experiential Learning, and McCallum Sweeney Consulting
December, 2012

Economic Strategic Assessment for the Greater Charlotte Region

Including the;

Centralina EDD Comprehensive Economic Development Strategy

And

Catawba Regional COG Comprehensive Economic Development Strategy



CONNECT: Vibrant Communities - Robust Region

- ❖ **The CEDS update will be integral to key economic sections of the “CONNECT: Vibrant Communities - Robust Region” initiative.**
- ❖ **The CONNECT three-year regional planning process is supported by a \$4.9 million HUD Sustainability grant to the Centralina Council of Governments and \$3 million in local matching resources.**
- ❖ **CONNECT will integrate economic and community planning in a quantitative and qualitative “blueprint” process for ensuring the required building blocks for regional economic growth exist.**
- ❖ **CONNECT will result in a strategic regional framework for the future, focused on growing jobs and the economy, quality of life, and controlling cost of government.**



Vibrant Communities – Robust Region



What is our Regional Economic Development Strategy?

- ❖ The Centralina Region **Comprehensive Economic Development Strategy** (CEDS) outlines an approach to regional growth and prosperity that:
 - builds on the region's strengths and assets;
 - emphasizes key regional industry clusters;
 - focuses the economic development priorities.
- ❖ Our Centralina Comprehensive Economic Development Strategy was first completed in 2004, with an initial five-year update in 2007.
- ❖ This new five year CEDS Update was completed in September 2012



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What is our *Updated* Regional Economic Development Strategy?

- ❖ The **Prosperity for Greater Charlotte** project and the HUD “**CONNECT Our Future**” Economic Development Group collaboratively partners the:
 - Centralina Council of Governments
 - Catawba Regional Council of Governments,
 - Centralina Economic Development Commission, and
 - Charlotte Regional Partnership
- ❖ *A key component of this strategic planning process is to help the regional economy boost its job growth rate by linking the region's workforce skills and strengths, education assets, and infrastructure to the needs of high-growth and emerging industries.*



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What makes this CEDS update process different than 2007?

- ❖ The *Prosperity for Greater Charlotte Project* culminates in three strategic plans:
 - *Centralina Comprehensive Economic Development Strategy* and integrally linked
 - Greater Charlotte region *Jobs, Workforce & Education Alignment Strategy* and
 - *Catawba Region Comprehensive Economic Development Strategy* (York, Lancaster, Chester, and Union Counties of South Carolina)
- ❖ The Centralina economic plan defines priorities, goals, and objectives to enhance the 9-county Centralina EDD region's overall business environment and maximize target cluster development throughout the 50 mile regional zone of influence.



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What makes this CEDS update process different than 2007?

- ❖ The **unique** additional **Jobs, Workforce and Education Alignment** recommendations that are customized to:
 - ❑ match the 17-county region's target industries and competencies with workforce supply and demand
 - ❑ specifically identify future workforce skills needs for each target sub-cluster
 - ❑ bridge gaps in the existing regional education and training pipeline to ensure each target is matched with a steady supply of qualified workers
- ❖ CEDS Update findings, regional strategies and **individual county report assessments** deliver economic foundation and data to the “CONNECT Our Future” planning process and outcomes.



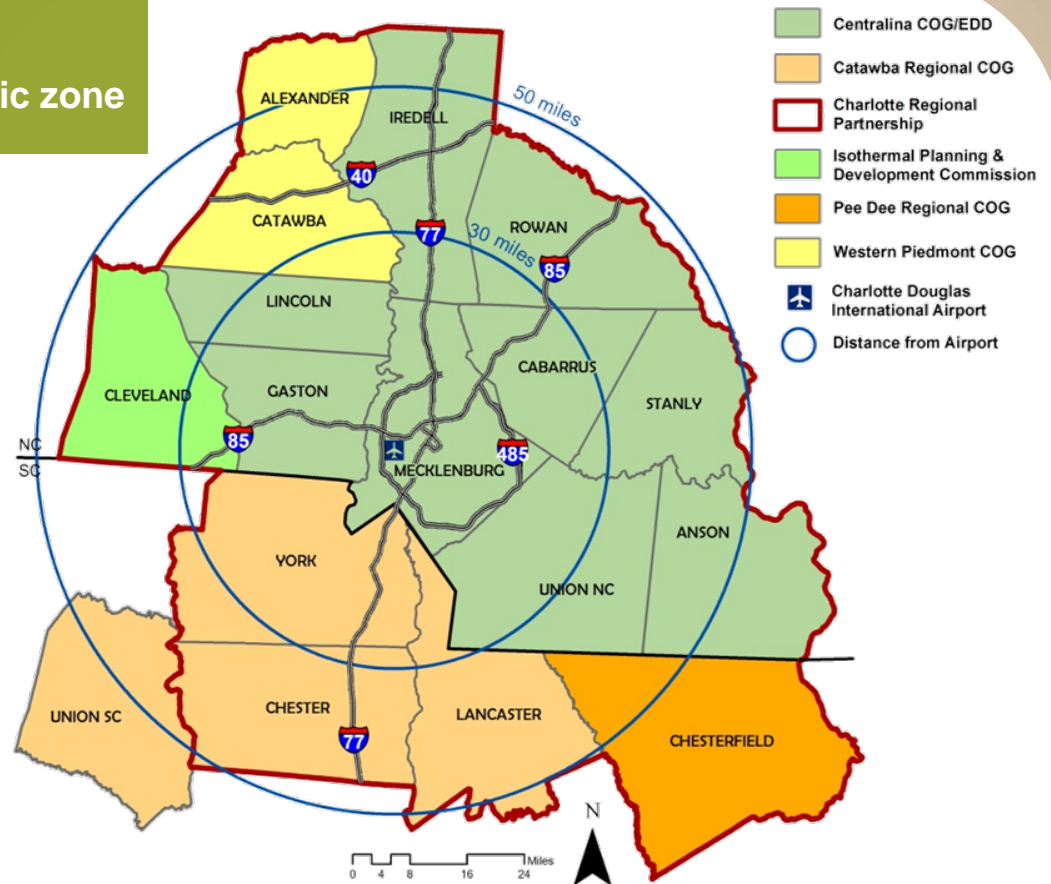
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21st Century Greater Charlotte Global Region

This collaborative community network exists within a fifty-mile radius economic zone

- ❖ Covers area in 2 states, 17 counties
- ❖ Includes 2 separate Councils of Government and incorporates border counties of 3 more
- ❖ Represents 7 workforce development boards that comprise an existing alliance organization
- ❖ Embraces over 58 local K-12 districts, community colleges, and higher education institutions



Project Geographic Area of Focus

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Best Practices – Latest Market Research for Regions

- Input
- Targeting Industry Clusters
- Industries and Competencies

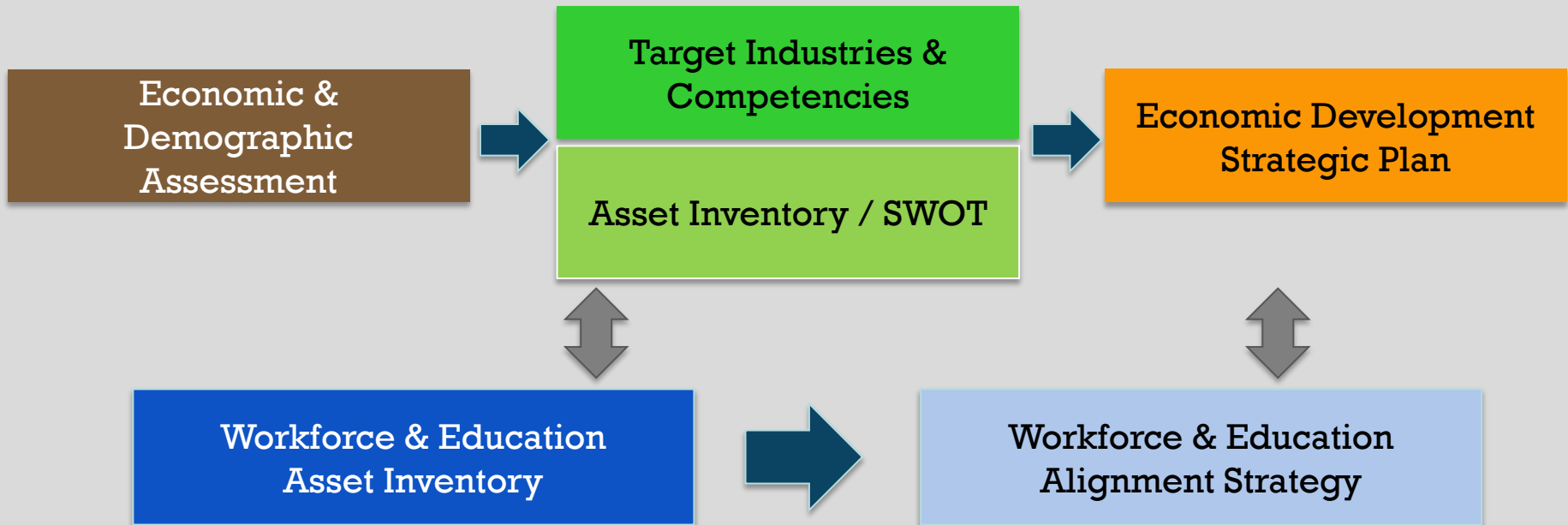
Project Consulting Team:



Vibrant Communities – Robust Region



Economic and Education Projects



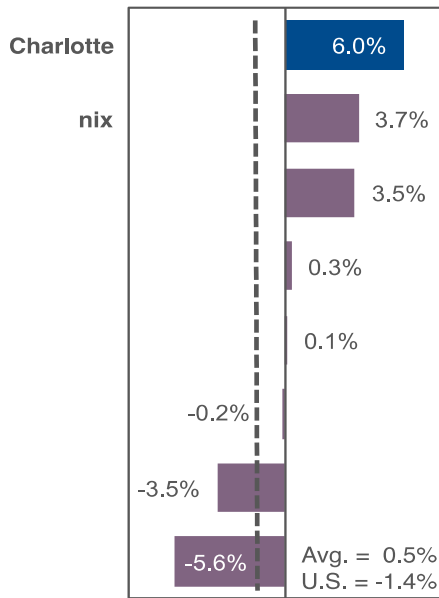
Project Focus:

- Alignment with existing plans/efforts
- Information and data compilation
- Communicating a clear vision and context

Report 1: Economic & Demographic Assessment

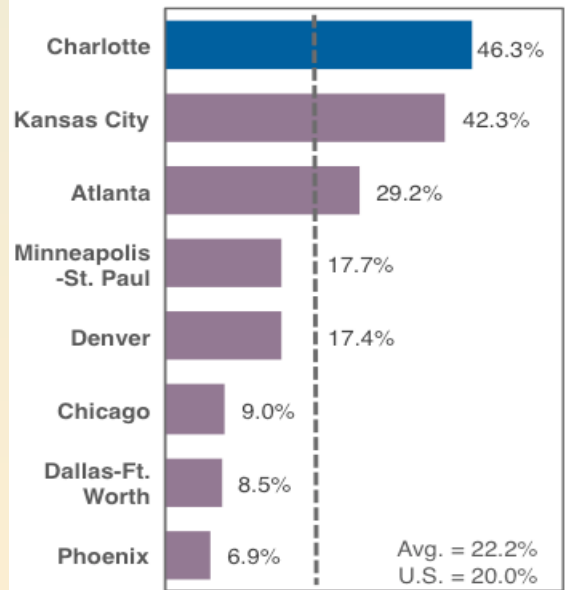
The Economic & Demographic Assessment and the Asset Inventory evaluated dozens of benchmark metrics on the Greater Charlotte region in five topic areas: Workforce, Entrepreneurship & Innovation, Infrastructure, Business Climate, and Quality of Life. We present samples of the data showing promising areas of growth for the region:

**Growth in Micro Firms, 2005-2010
(Fewer than 10 Employees)**



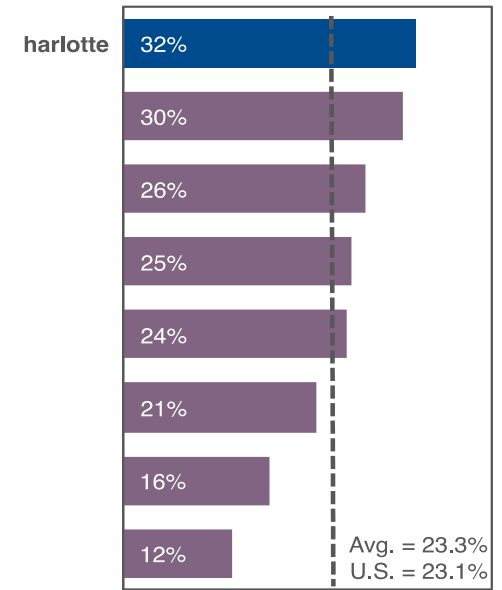
Growth in firms for all industries

Patent Growth, 2006-2010



0% 20% 40% 60%
Growth in patents issued

College Enrollment Growth, 2005-2010



Growth in college enrollment

Goals of the Centralina Strategic Plan

Workforce & Education

Prepare the region's workforce and students with skills, competencies, and knowledge that align with target industry needs.

Entrepreneurship & Innovation

Enable a highly innovative entrepreneurial climate that drives the creation of high-growth firms.

Infrastructure

Ensure the region has a highly connected, efficient multimodal transportation system and an abundant supply of shovel-ready sites.

Business Climate

Create a globally competitive region around the target industries and a strong business brand worldwide.

Quality of Life

Continue investing in the region's lifestyle amenities and making the region attractive to a young professional workforce.

Seven Priorities of Centralina CEDS

- 3 of the 7 priorities are focused on education and workforce
- Other 4:
 - Entrepreneurial support
 - Target industry and competency development
 - Regional Collaboration
 - Marketing



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Each County Has Been Provided Their Own Sub-Report

Employment Growth Trend

MECKLENBURG COUNTY, NC

Industry Composition

MECKLENBURG COUNTY, NC

Workforce Conditions

MECKLENBURG COUNTY, NC

Top 15 Private Sector Industries by 4-Digit NAICS

MECKLENBURG COUNTY, NC

Private Sector Industry Clusters

MECKLENBURG COUNTY, NC

Mecklenburg County's three **largest clusters** by employment size are Retail (62,400 employees), Culture & Entertainment (62,000), and Finance (56,700).

The county's three **fastest growing clusters of the past five years** (2007 to 2012) were Healthcare (20% growth, 7,500 new jobs), Culture & Entertainment (12% growth, 6,600 new jobs), and Research (26% growth, 2,200 new jobs).

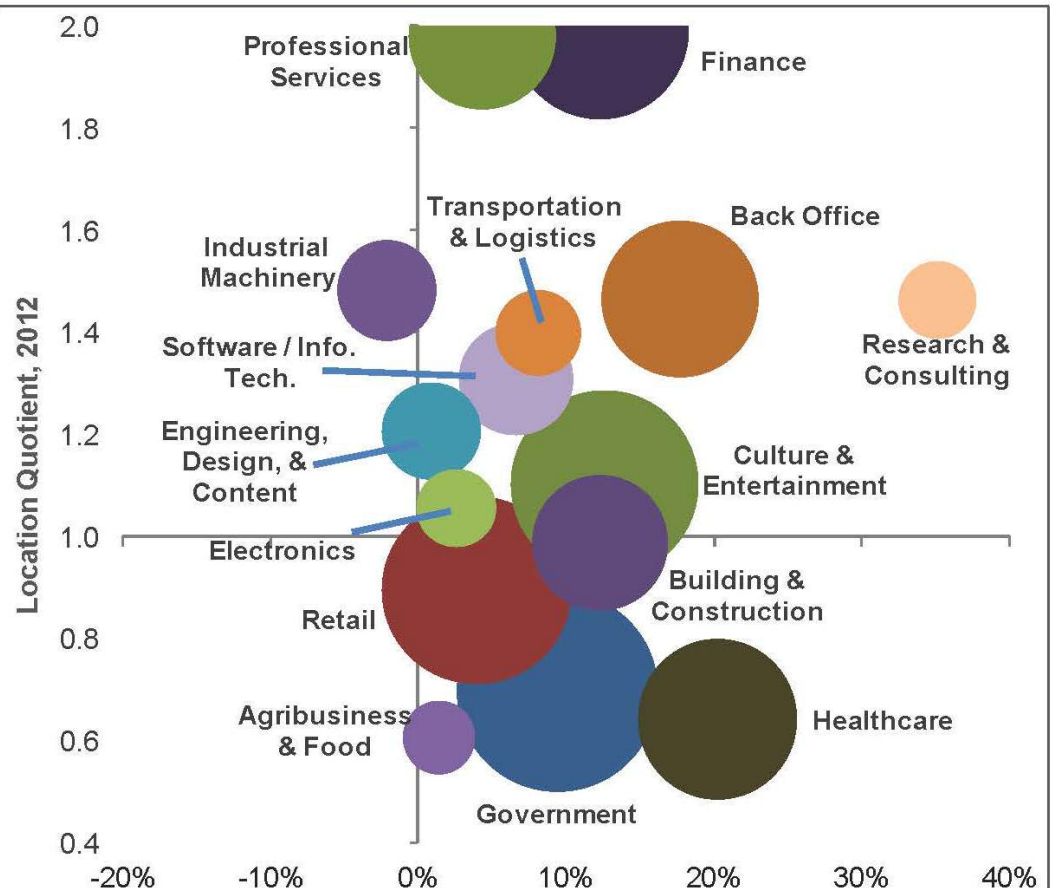
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Research (35% forecast growth), Biomedical Supplies & Labs (21%), and Healthcare (20%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Finance (LQ=1.99), Professional Services (1.98), and Industrial Machinery (1.48). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, **emerging clusters** – those with a low LQ but high growth rates – include Aerospace, Biomedical Supplies & Labs, and Private Education.

Declining clusters include Building & Construction, which employs 31,800 workers, has an LQ of 0.99, and lost 33% of its employment base (15,400 jobs) in the last five

Industry Clusters: Mecklenburg County, NC



Report 2: Asset Inventory, SWOT & Target Industries and Competencies

Competencies Form at the Nexus of Industry, Workforce, Technology and Infrastructure

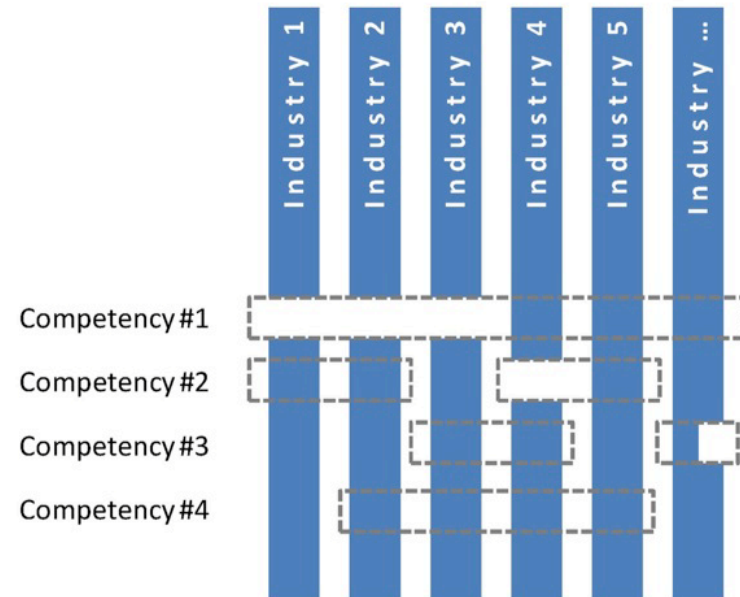


INDUSTRIES AND COMPETENCIES

Through research and discussions, the consultants and Steering Committee concluded that targets fall into two categories: industries and competencies.

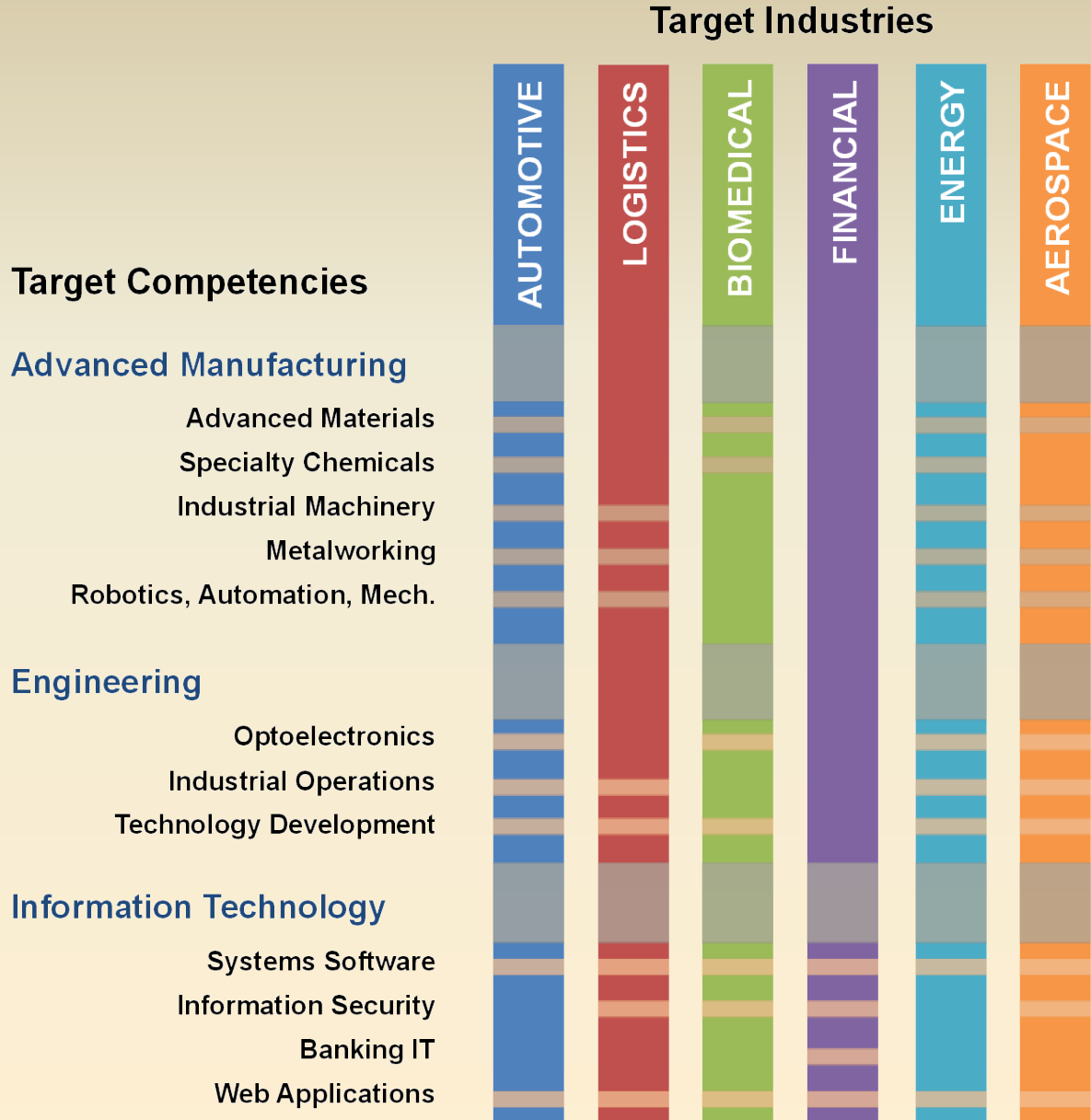
A **vertical industry target** is one that is focused on a specific market or product, such as aerospace.

A **horizontal** (or platform) **competency target** can consist of a unique technology, workforce skill, and/or physical asset that supports numerous vertical industries and the economy as a whole.



Target Competency Matrix – Greater Charlotte Region

Report 2: Asset Inventory, SWOT & Target Industries and Competencies



Report 2: Asset Inventory, SWOT & Target Industries and Competencies

Target Industries

Italics = emerging

Automotive	Logistics & Global Commerce	Biomedical & Health
Motorsports	Intermodal Distribution	Biomedical Supplies & Labs
Battery Technology	Warehousing	Regional Health Care
Automotive OEMs	International Logistics HQs	Medical Device Mfg
Auto Suppliers, incl. Plastics	Food Processing & Distribution	Bioinformatics & Genomics
Electronic Components	Paper & Wood Product Mfg/Dist.	Nutritional Sciences
Financial Services	Energy	Aerospace & Defense
International & Domestic Banking	Nuclear Components	Aircraft parts suppliers
Investment Banking	Energy Equipment & Components	UAVs
Insurance	Energy Generation & Dist.	Defense Contractors
Back Office	Clean Energy	Defense Research
Financial IT		
Corporate Headquarters	Tourism	Film

Target Competencies

Advanced Manufacturing	Engineering	Information Technology
Advanced Materials	Optoelectronics	Data Centers
Specialty Chemicals	Defense	Systems Software
Industrial Machinery		Information Security
Metalworking		Banking IT
Robotics, Automation, Mechatronics		Web applications

Aspirational Targets

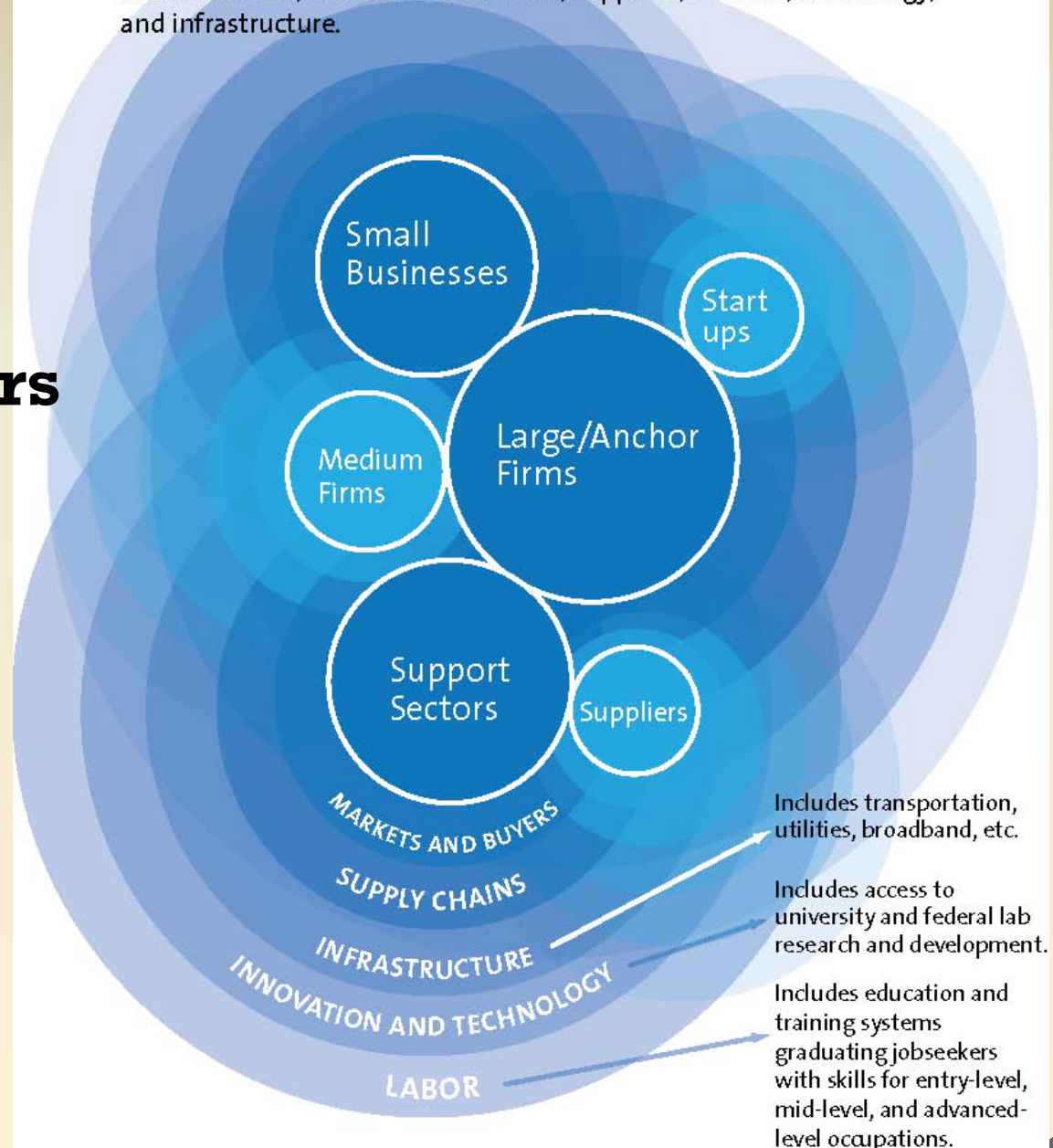
Software	Health Care	Financial Services
Logistics IT	Clinical Testing	Mobile Banking IT
Data Visualization	Health Care IT	

Industry and Economic Drivers

Issue: How to ensure the Talent Pipeline of a qualified, skilled workforce **exists** to support your **existing and growing** economic sector

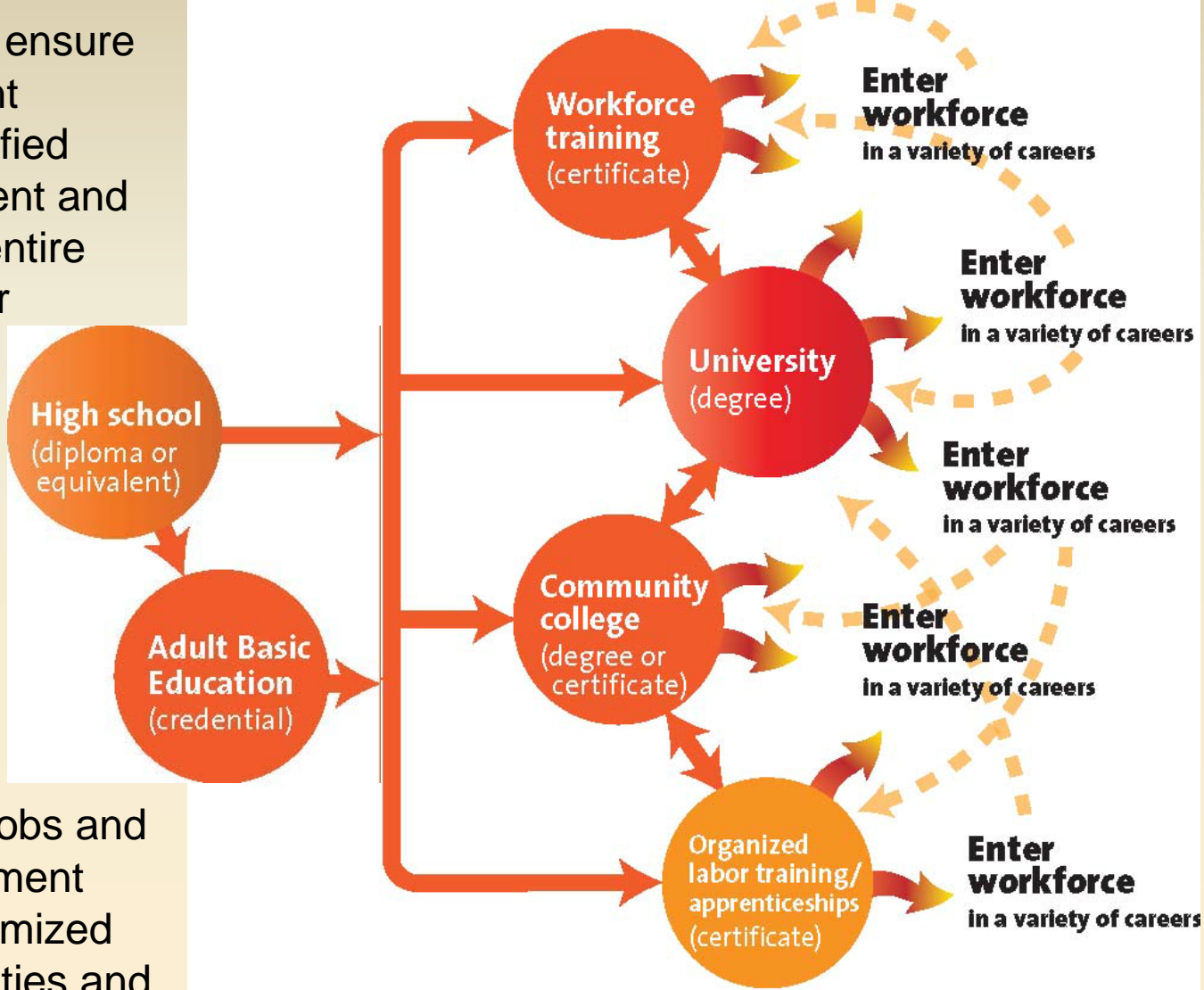
Goal: Maintain and expand our position as a leading economic region

An industry cluster consists of large and small firms in a single industry. Firms in industry clusters benefit from synergies of association related to shared labor, sources of innovation, suppliers, markets, technology, and infrastructure.



Education and Talent Pipeline

Issue: How to ensure a qualified Talent Pipeline of qualified workers is present and ***aligned*** to the entire economic sector ***demand***



Goal: Ensure Jobs and Re-Skill employment potential is maximized for our communities and region and the business sector

After being in the workforce, a person may choose to go back for more credentials to make an upward or lateral career move.

Solution: Our Alignment Approach Unique on a Regional Scale

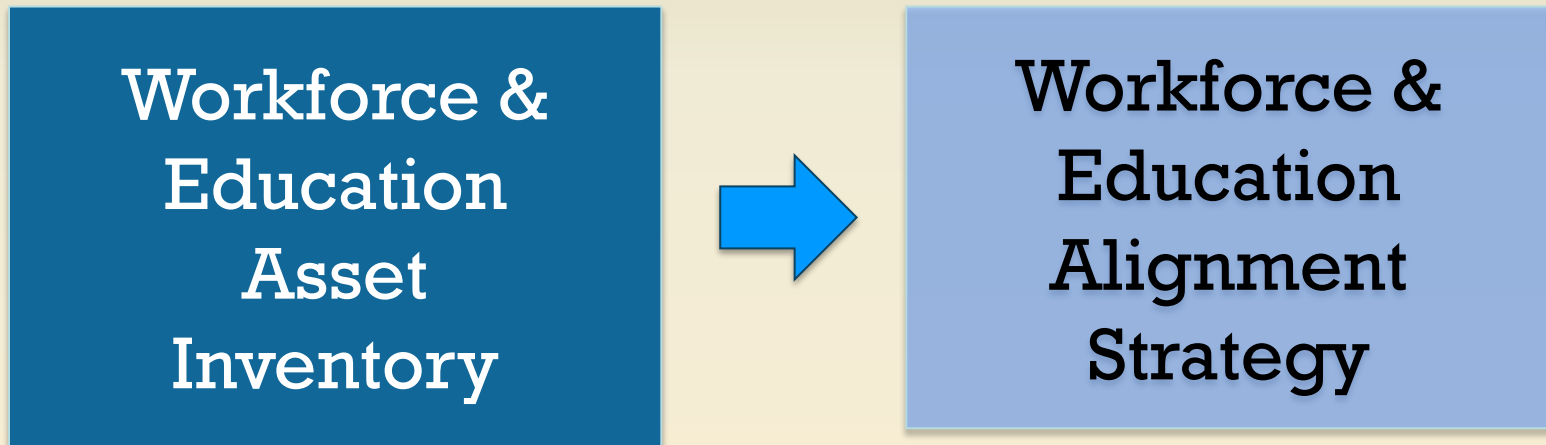


PROSPERITY FOR GREATER CHARLOTTE

Jobs, Workforce & Education Alignment Strategy for the Greater Charlotte Region



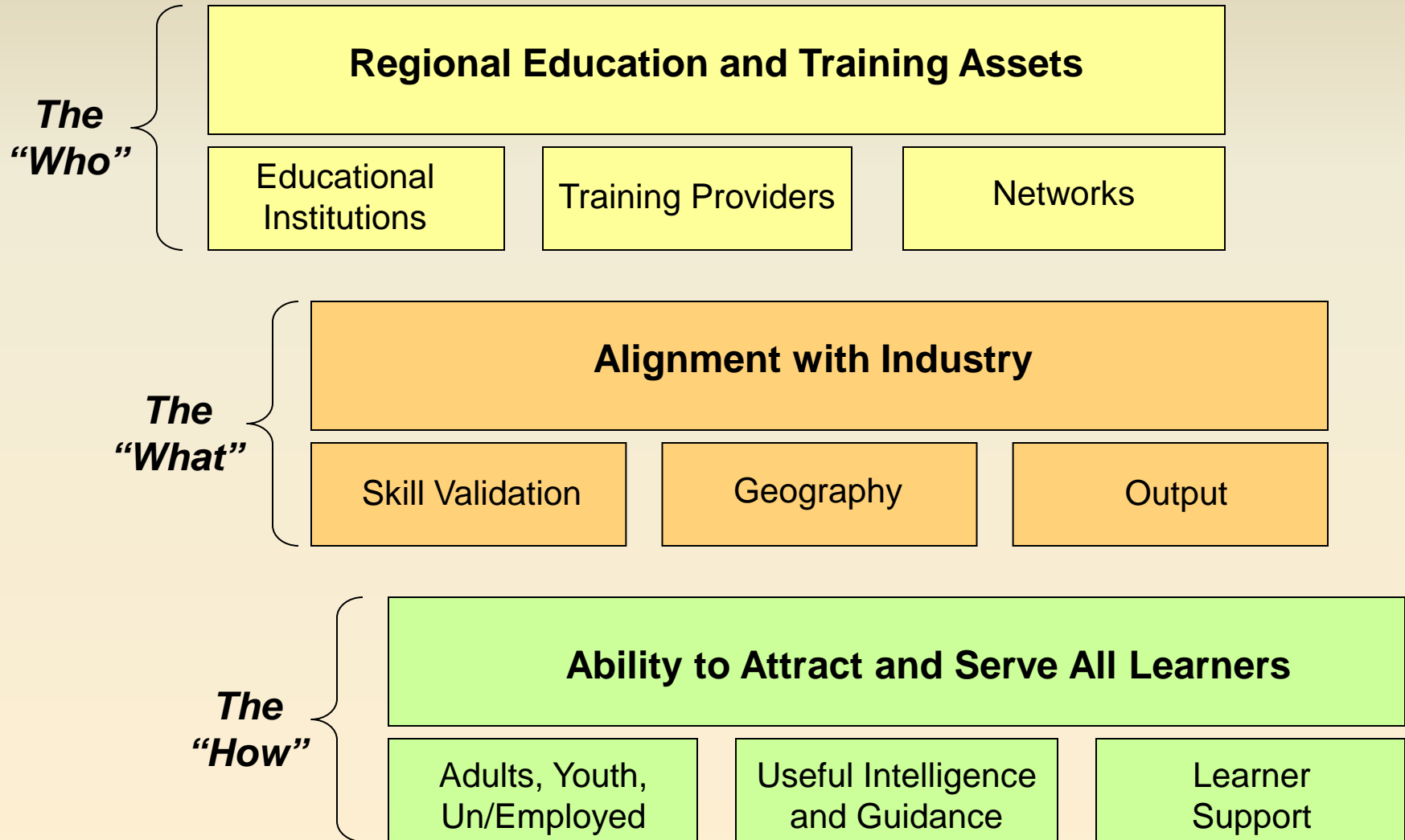
Jobs, Workforce & Education Alignment



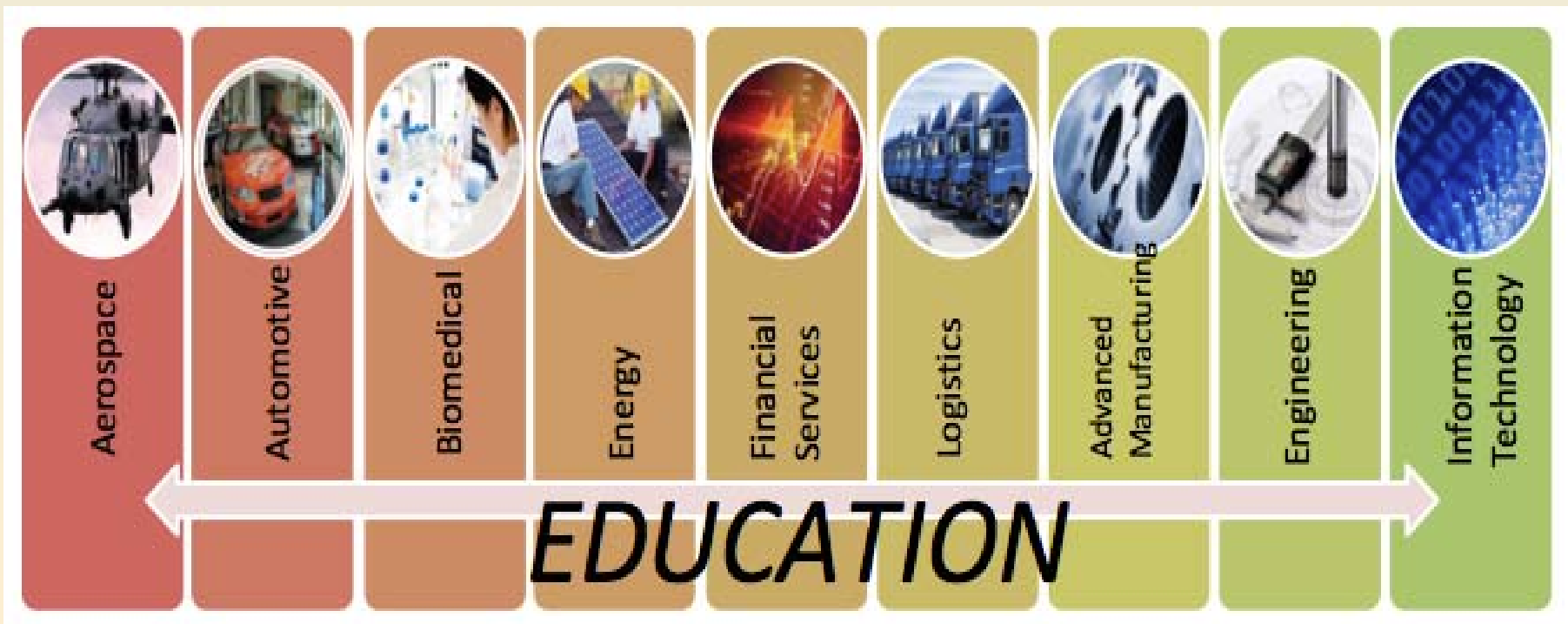
- Geographic focus covers the larger bi-state region to also serve the HUD Connect project

Understanding our Talent Development Assets

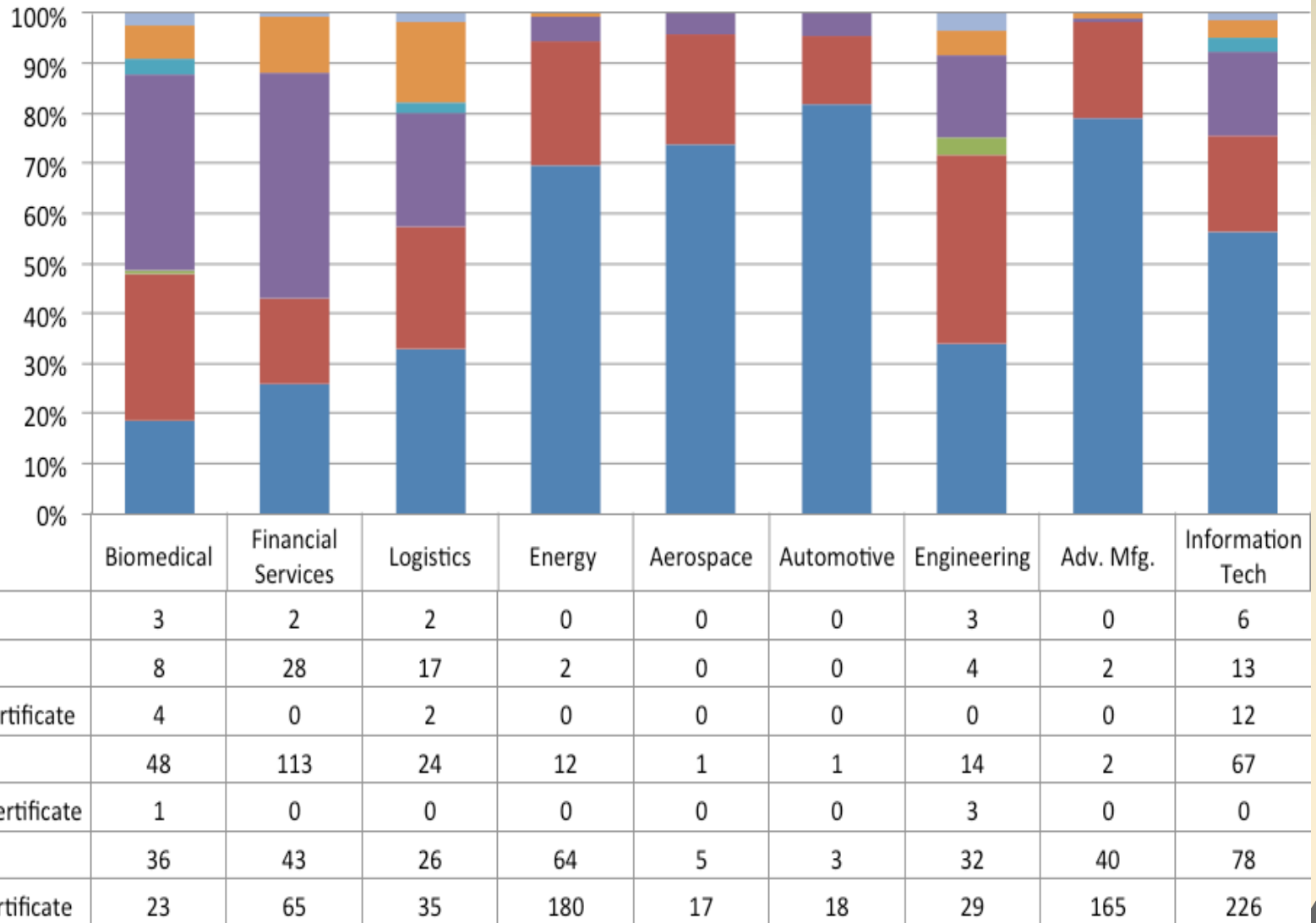
Examining Supply-Demand Alignment



Review of the region's 47 public and private institutions yielded a complete inventory of educational programs that serve the needs of the region's target industries and competencies

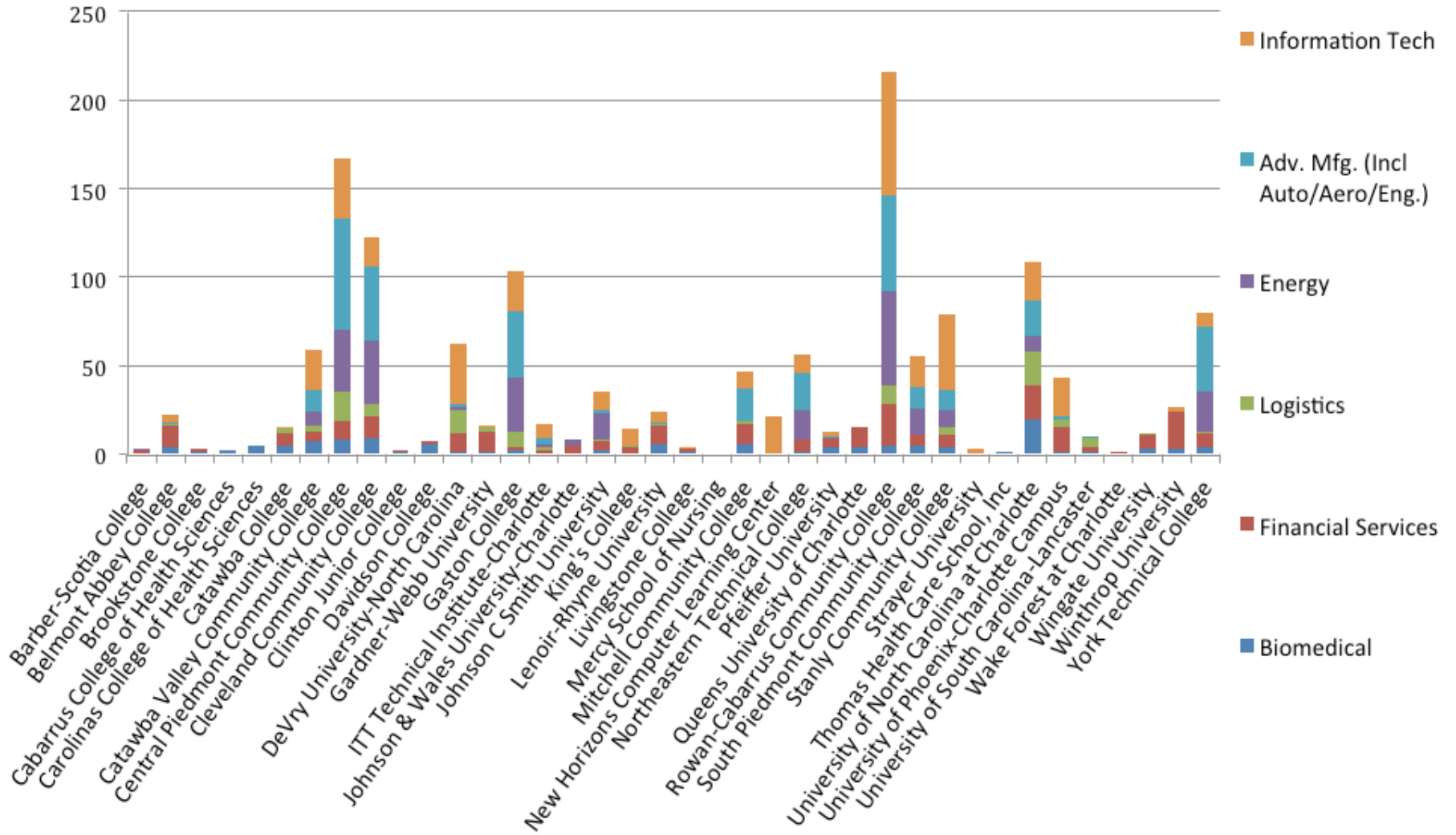


Programs Per Target Sector



Programs Per Institution

Sector Programs Per Institution



Contrasting College Output with Occupational Demand

College Graduate Output by Major Degree Group and Level

Greater Charlotte Region

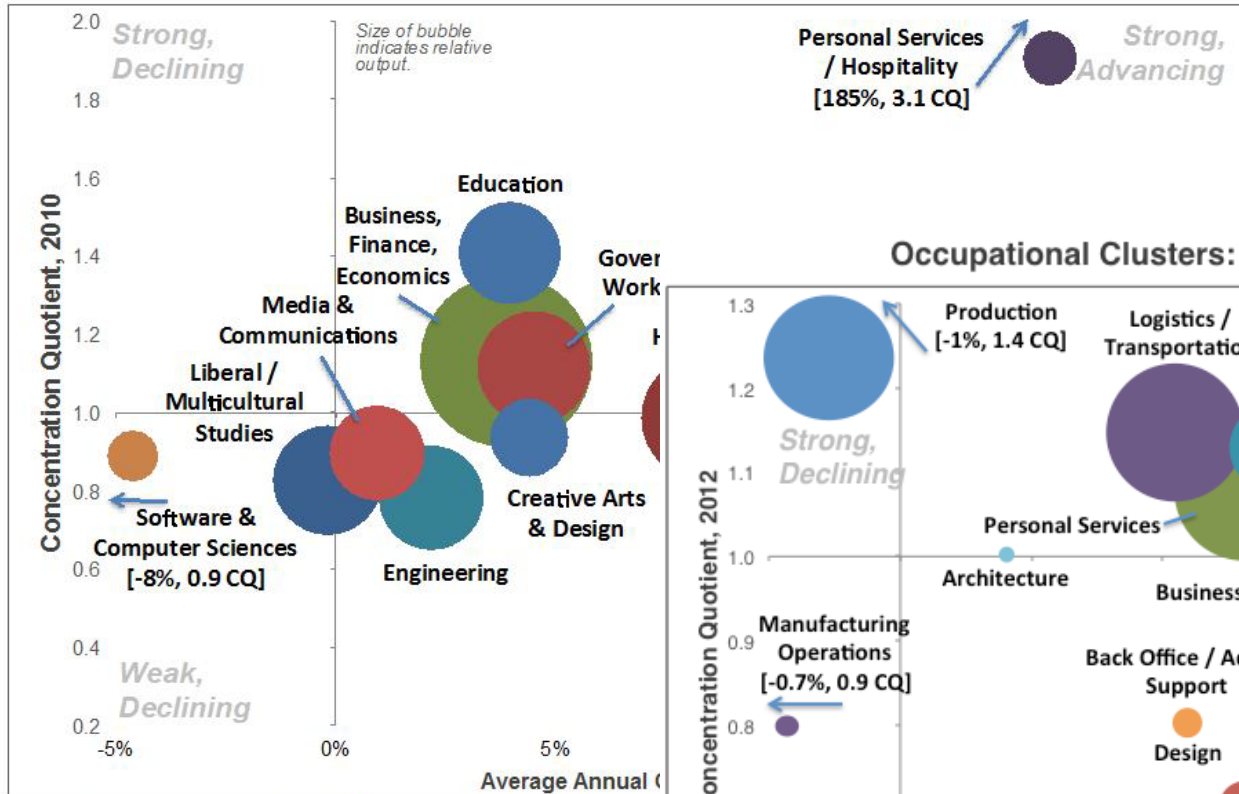
Major Degree Group	Degrees, 2010			Compounded Annual % Growth, '05-'10					
				Associate's		Bachelor's		Master's or Higher	
	Assoc	Bach	Mast+	Charlotte	US	Charlotte	US	Charlotte	US
Agriculture	29	22		↗ 1.3%	↘ -1.6%	↗ 17.1%	↗ 2.6%		↗ 1.1%
Architecture		71	29		↘ -1.4%	↗ 0.3%	↗ 1.8%	↗ 19.3%	↗ 5.1%
Business, Finance, & Econ	710	2,115	1,098	↗ 2.9%	↗ 4.2%	↗ 3.9%	↗ 2.9%	↗ 6.8%	↗ 4.8%
Construction	59			↗ 1.8%			↗ 13.2%		↗ 16.7%
Creative Arts & Design	147	434	11	↘ -0.3%	↘ -2.8%	↗ 4.4%	↗ 2.5%	↗ 0.0%	↗ 3.4%
Education	237	738	762	↗ 12.8%	↗ 4.0%	↗ 4.0%	↘ -0.8%	↗ 4.5%	↗ 2.0%
Engineering	300	777	141	↗ 5.5%	↗ 1.5%	↗ 2.2%	↗ 4.0%	↗ 1.8%	↗ 3.4%
Family Development	97	283	35	↗ 6.1%	↗ 3.5%	↗ 8.5%	↗ 5.0%	↗ 16.9%	↗ 6.1%
Government, Social Work	181	905	118	↗ 3.3%	↗ 8.6%	↗ 4.5%	↗ 2.9%	↗ 19.2%	↗ 4.6%
Health Care	1,370	1,121	463	↗ 5.9%	↗ 8.1%	↗ 8.4%	↗ 6.2%	↗ 17.6%	↗ 6.3%
Legal	85	4		↗ 0.7%	↗ 0.3%	↘ -18.3%	↗ 3.5%		↗ 1.2%
Mathematics		114	16		↗ 5.4%	↗ 16.1%	↗ 2.5%	↗ 4.2%	↗ 5.1%
Mechanics, Machine Repair	127			↗ 17.8%	↗ 3.3%		↘ -0.5%		↗ 13.0%
Media and Comm	30	639	97	↗ 13.4%	↗ 5.2%	↗ 0.9%	↗ 1.5%	↗ 5.6%	↗ 2.7%
Liberal/Multicult. Studies	1,803	850	210	↗ 9.7%	↗ 3.5%	↘ -0.2%	↗ 2.5%	↗ 12.0%	↗ 2.9%
Personal Svcs / Hospitality	559	187		↗ 57.3%	↗ 0.0%	↗ 184.7%	↗ 9.2%		↗ 7.0%
Software & Comp Sci	253	223	123	↘ -2.2%	↘ -2.9%	↘ -7.8%	↘ -7.1%	↗ 3.0%	↘ -2.2%
Transport. Professionals	9			n/a	↗ 5.4%		↗ 1.4%		↗ 9.2%
GRAND TOTAL	5,996	8,483	3,103	↗ 7.9%	↗ 4.0%	↗ 3.9%	↗ 2.7%	↗ 7.7%	↗ 3.6%

Source: Avalanche Consulting using data from the US Dept of Education

Note: Masters+ includes Master's, Professional, and PhD degrees

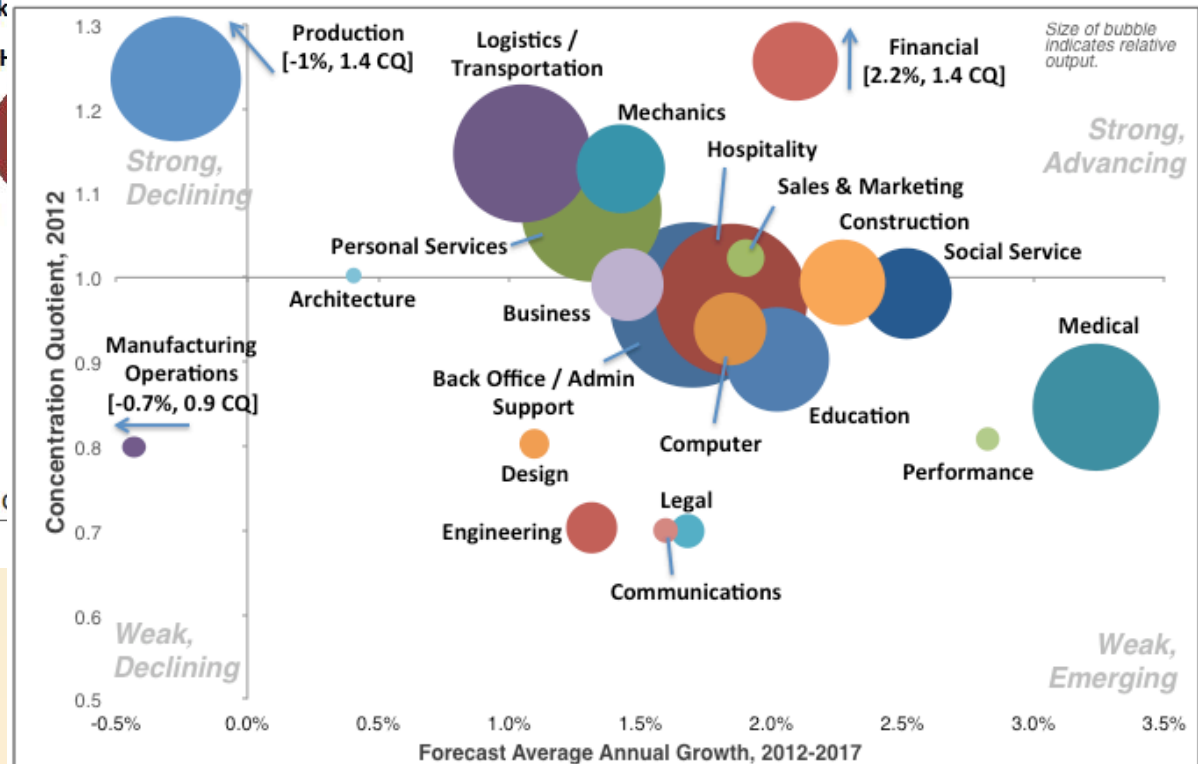
Contrasting College Output with Occupational Demand

Bachelor's Degree Clusters: Greater Charlotte Region



Source: Avalanche Consulting using data from US Dept. of Education

Occupational Clusters: Greater Charlotte Region



Source: Avalanche Consulting using data from EMSI

Also: High School Career Programs

NC and SC High School Career Cluster Programs

State	County	School District	Agriculture, Food and Natural Resources	Architecture and Construction	Arts, Audio/Video Technology and Communications	Business Management and Administration	Education and Training	Finance	Government and Public Administration	Health Science	Hospitality and Tourism	Human Services	Information Technology	Law, Public Safety, Corrections and Security	Manufacturing	Marketing	Science, Technology, Engineering and Mathematics	Transportation, Distribution and Logistics
NC	Alexander County	Alexander County Schools	X	X	X	X		X		X	X	X	X			X	X	
NC	Anson County	Anson County Schools	X	X	X	X		X		X	X	X	X			X	X	X
NC	Cabarrus County	Carrabus County Schools	X	X	X	X		X		X	X	X	X	X		X	X	X
NC	Cabarrus County	Kannapolis City Schools		X		X	X			X	X		X			X	X	
NC	Catawba County	Catawba County Schools	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
NC	Cleveland County	Cleveland County Schools	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
NC	Gaston County	Gaston County Schools	X	X	X	X		X		X	X	X	X			X	X	X
NC	Iredell County	Iredell-Statesville Schools	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
NC	Iredell County	Mooresville Graded School District	X	X	X	X		X		X	X	X	X		X	X	X	X
NC	Lincoln County	Lincoln County Schools	X	X		X	X	X		X	X	X	X		X	X	X	X
NC	Mecklenburg County	Charlotte-Mecklenburg Schools	X	X	X	X	X	X		X	X	X	X		X	X	X	X
NC	Rowan County	Rowan-Salisbury Schools	X	X	X	X	X			X	X	X	X			X	X	
NC	Stanly County	Stanly County Schools	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
NC	Union County	Union County Public Schools	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
SC	York County	Rock Hill Schools	X	X	X	X	X	X	X	X	X	X	X	X		X	X	
SC	York County	Fort Mill Schools	X	X	X	X	X	X		X	X		X	X		X	X	X
SC	York County	Clover School District	X	X	X	X	X	X		X	X	X	X		X	X	X	
SC	York County	York School District One	X	X		X		X		X		X	X		X	X	X	
SC	Union County	Union County School District	X	X	X	X		X		X		X			X		X	
SC	Lancaster County	Lancaster County Schools	X	X	X	X	X	X		X	X	X	X	X	X		X	X

Target Sector Inventory, Needs & Recommendations

Aerospace Programs	Catawba Valley Community College	Central Piedmont Community College	Cleveland Community College	Gaston College	Rowan-Cabarrus Community College	University of North Carolina at Charlotte
Aeronautics						B*
Aerospace Engineering			A			
Aerospace Technology						
Composites						
Computer Integrated Machining	C	A	C	C, A	C, A	
Material Science						
Non-Destructive Examination Technology		C				
Project Management						
C=Certificate, A=Associate, PAC=Post-Associate Certificate, B=Bachelor, PBC=Post-Bachelor Certificate, M=Master, D=Doctoral, *=Minor Only						

Workforce & Education – *Findings from Jobs, Workforce and Education Alignment Study*

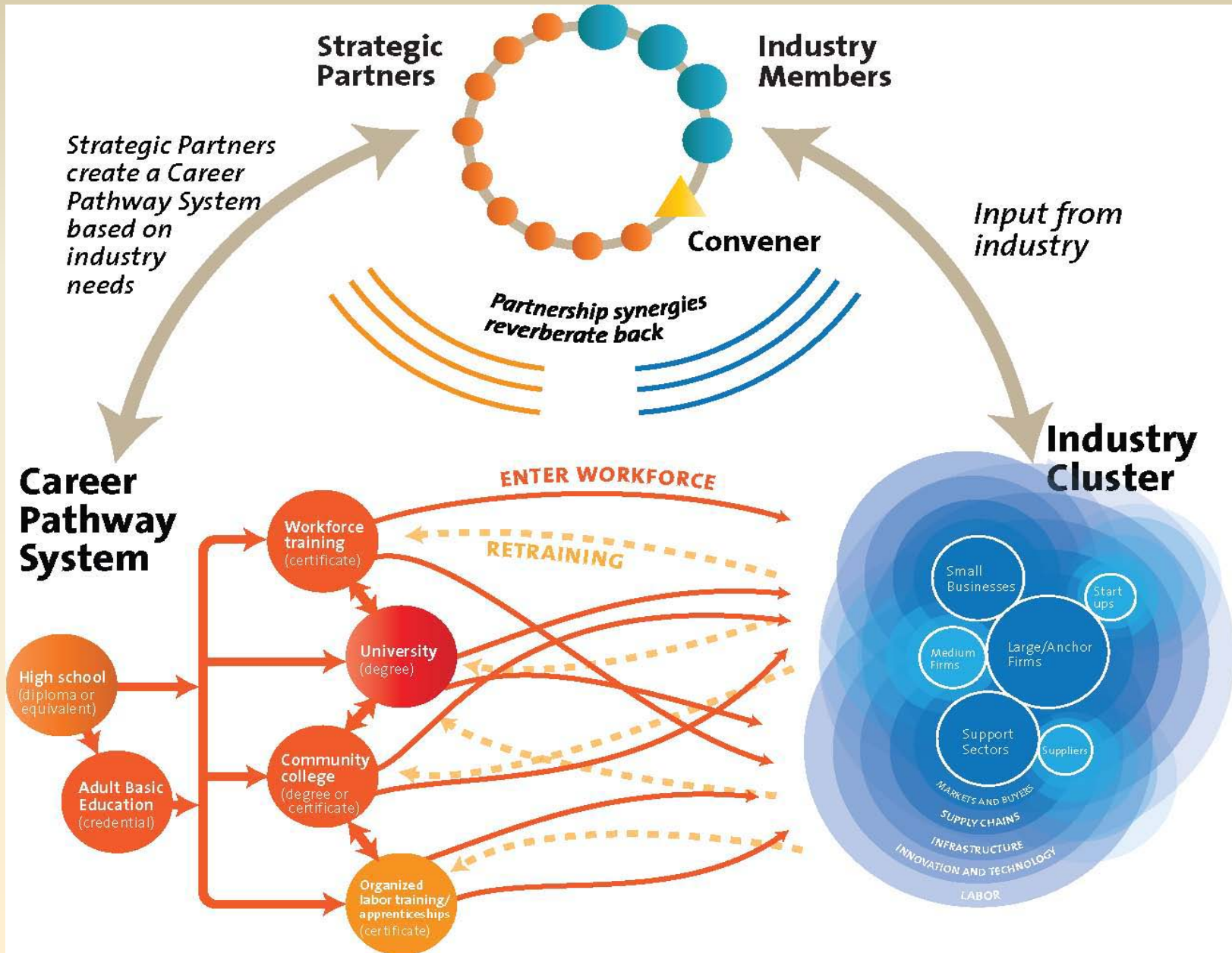
- **OBJECTIVE 1: Expand Target Sector Education and Training Alignment Programs.**
- **OBJECTIVE 2: Expand Target Sector and Competency Career Awareness and Connections.**
- **OBJECTIVE 3: Formalize Structures for Workforce System Partnerships across the Region.**
- **OBJECTIVE 4: Strengthen Regional Collaboration and Target Industry Input.**
- **OBJECTIVE 5: Enhance Employer Engagement and Employer Services.**
- **OBJECTIVE 6: Increase Regional Opportunities for Credential Attainment.**



Vibrant Communities – Robust Region



Sector Partnerships: The Keystone to Connecting Career Pathways to Industry Cluster Growth



The Future of CEDS = Online

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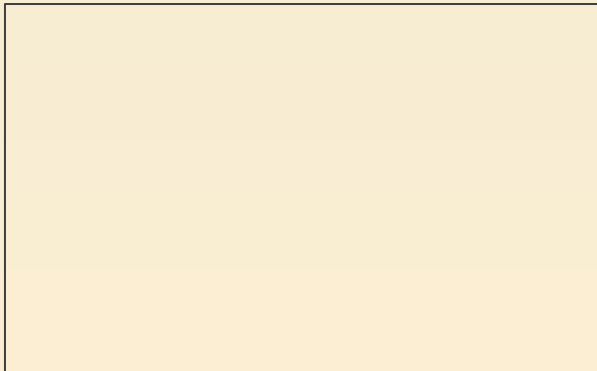
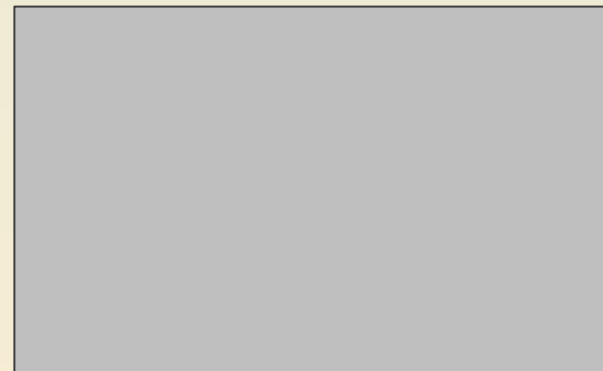
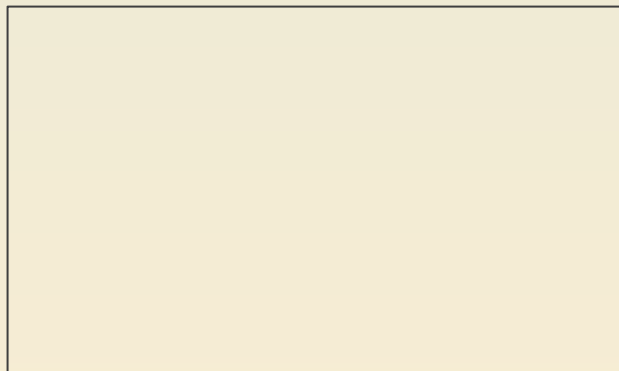
Industry

Entrepreneurs

Talent

Infrastructure

Lifestyle



The Future of CEDS = Online

PROSPERITY FOR GREATER CHARLOTTE

Industry

Entrepreneurs

Talent

Infrastructure

Lifestyle

GOAL: The Greater Charlotte Region has a highly innovative entrepreneurial climate that drives the creation of high-growth firms.

Why?

OBJECTIVES

Services

Spaces

Funding

Research

Education

Coordinate and boost support services for entrepreneurs across the region.

Initiatives

- The Charlotte Entrepreneurial Alliance brings dozens of support organizations to enhance and coordinate services to entrepreneurs.
- Events such as the PowerUp Entrepreneurial Challenge and Startup Weekend bring entrepreneurs, mentors, and funders together.

Links to Key Players

- Charlotte Chamber
- UNCC
- CPCC
- Ben Craig Center
- SBTDC

<More>

See the Data

News

Lorem ipsum dolor

The individual chooses a Field from a dropdown to see high-level professions (as shown), or a specific profession to see occupations within (like Registered Nursed, Nurse Practitioner, etc.)

Field ▼ Profession ▼ Geographic Focus ▼

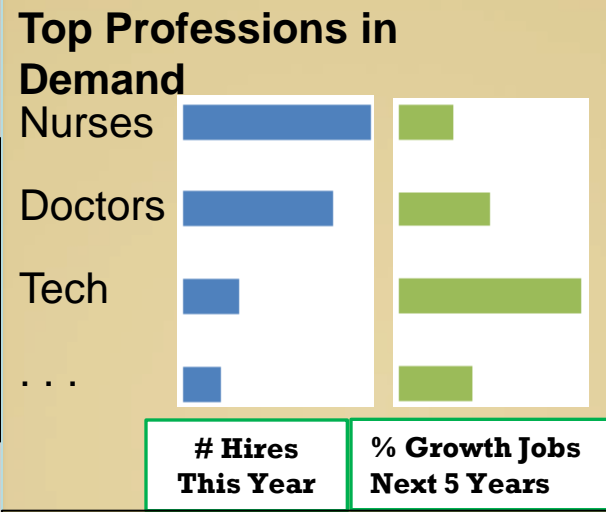
Medical Field

Description

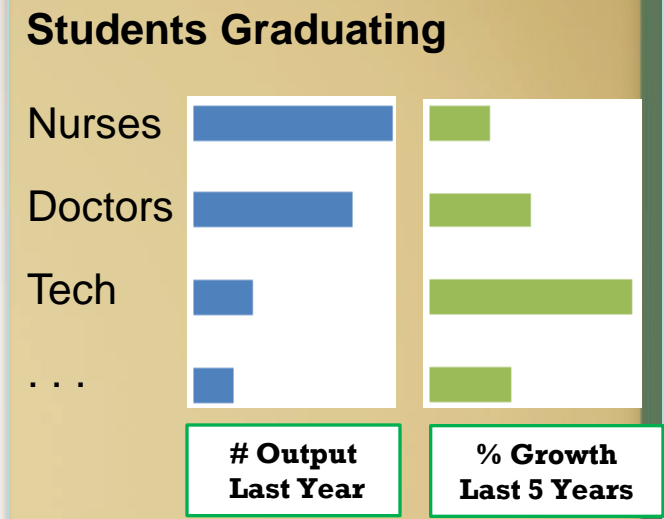
Skills Required
 Science
 Communications
 Math

Education – Local Programs
 -list
 -list
 -list
 -list

[Click here to see programs on a map](#)



- Top Hiring Industries**
- Hospitals
 - Clinics
 - Universities
 - Government



Relative to All Other Fields

- Wage Level: 1/4 circle
- Education Requirements: 1/4 circle
- Industry Diversification: One Industry (dot) to Many Industries (line)
- Growth Potential: 1/4 circle
- Worker Shortages: 1/4 circle

Project Notes:

- ❑ Use of “Greater Charlotte Region” in the language of this project is reflective of the larger collaborative analysis by the Centralina EDD and the additional inter-relational and centralized impacts of the 50 mile regional zone.
- ❑ All report findings and priorities with goals, objectives, and tactics are specifically endorsed and adopted only for the EDA-approved nine-county jurisdiction of the Centralina Economic Development Commission (EDD).
- ❑ This report in no way replaces or supplants adjacent EDD CEDS jurisdiction plans that share partial coverage within the economic zone of influence defined and analyzed for this report.



Vibrant Communities – Robust Region



This project is a live ongoing initiative and not a “shelf report” to be already outdated when printed !

Please give us your comments, suggestions, feedback , inquiries !

Contacts:

David Hollars - Competitive Workforce Alliance - Centralina Workforce Board
dhollars@centralina.org

Sushil Nepal - CCOG CONNECT Project Manager
snepal@centralina.org

Michael Manis, CEcD - CCOG Community and Economic Development
mmanis@centralina.org

Thank You.



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