



## Centralina Council of Governments

Serving the nine county Greater Charlotte Region  
to grow jobs and the economy, control cost of  
government, and improve quality of life



February 25, 2014

White House - Eisenhower Executive Office Building  
Global Charlotte Manufacturing Community Consortium Roundtable



## Centralina Economic Development Commission

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*Centralina Economic Development Commission, housed in the Centralina Council of Governments, is a 501c3 organization serving the greater Charlotte region and supporting the key activities proposed in the Centralina Regional Comprehensive Economic Development Strategy. The strategy outlines an approach to regional growth and prosperity that builds on the region's strengths, emphasizes key regional industry clusters, and prioritizes economic development projects.*

### **Centralina Economic Development Commission**

525 N. Tryon Street, 12th Floor • Charlotte, NC 28202

Phone: 704-348-2720 • Fax: 704-347-4710 • E-mail: [cedc@centralina.org](mailto:cedc@centralina.org) • [www.ProspertyForGreaterCharlotte.com](http://www.ProspertyForGreaterCharlotte.com)



# Global Charlotte Manufacturing Community Consortium Roundtable

Eisenhower Executive Office Building

February 25, 2014

12:30 to 2:30 PM

## **Welcoming Remarks**

Rohan Patel, Special Assistant to the President and Deputy  
Director for Intergovernmental Affairs

## **Opening Remarks**

Mayor Cannon of Charlotte and Mayor Atkins of Mooresville

## **Overview of the Administration's Manufacturing Policy Agenda**

Jason Miller, Special Assistant to the  
President for Manufacturing Policy

## **Roundtable Discussion**

North Carolina Consortium and White House and Administration Officials

- ◆ *Charlotte Region Economic Initiatives and Strategies*

## **Roundtable Topics**

- ◆ *Greater Charlotte Region's Manufacturing Ecosystem*
- ◆ *How the Charlotte Region's knowledge base of engineering and manufacturing provides America with a global competitive advantage*
- ◆ *Region's pragmatic research delivery and solutions ready for the shop floor and growing business*
- ◆ *Region's leading Supply Chain and Logistics expertise and assets*
- ◆ *Key Industry CEO assessments and issues*

## **Closing**

JJ Raynor, Policy Advisor, National Economic Council Office of the President

## Regional Manufacturing Community Economic Strategic Framework

	<p>1</p> <p>Greater Charlotte Region's Collaborative Manufacturing Ecosystem</p>	
<p>4</p> <p>Charlotte Region's leading Supply Chain and Logistics expertise and assets</p>	<p><b><u>KEY MESSAGE:</u></b> We must accelerate the Charlotte Region's manufacturing ecosystem through a collaborative partnership of workforce training, R &amp; D resources, and logistics to ensure the next stage of our manufacturing heritage and sustain our leading position in the global economy</p>	<p>2</p> <p>Charlotte Region's Manufacturing base and Advanced Industries knowledge provides America with a global competitive advantage</p>
	<p>3</p> <p>Charlotte Region's pragmatic Research delivery and Innovation solutions</p>	



# The World's Most Competitive Cities: A Global Investor's Perspective on True City Competitiveness

**Ranked #33 of World 100  
One of only 12 in US**



## The World's Most Competitive Cities

*A Global Investor's Perspective on True City Competitiveness*

A report by Site Selection magazine in cooperation with IBM Global Business Services



Cross Sector Quality Rankings	
2	New York, New York
4	Chicago, Illinois
8	San Francisco, California
12	Atlanta, Georgia
15	Dallas, Texas
18	Washington, DC
21	Philadelphia, Pennsylvania
24	Los Angeles, California
28	Houston, Texas
32	Miami, Florida
33	<b>Charlotte, North Carolina</b>
38	Detroit, Michigan



## **Charlotte's Cross Sector Ranking Among the World's 100 Most Competitive Cities**





## ***CEDC Awarded a \$200,000 U.S. Commerce EDA “Investing in Manufacturing Communities Partnership” (IMCP) Strategy Grant by the White House and US Department of Commerce***

In June, the Centralina Economic Development Commission (CEDC) and Centralina Council of Governments submitted a co-application for the U.S. Economic Development Administration's [Investing in Manufacturing Communities Partnership](#) (IMCP) program and official announcement of award was made by the White House and US Department of Commerce on September 25, 2013.

IMCP is a new federal Administration-wide initiative that will accelerate the resurgence of manufacturing and help cultivate an environment for businesses to create well-paying manufacturing jobs in regions across the country. The IMCP is designed to reward communities that demonstrate best practices in attracting and expanding manufacturing by using long-term planning that integrates targeted investments in workforce training, infrastructure, research, and other key assets. The IMCP grant, one of just 26 awarded by EDA around the country, is intended to help communities create economic development strategies that leverage their comparative advantages.

"This is a huge opportunity for our region that builds on our decade long focus on reinventing manufacturing," said Mike Manis, Centralina Community and Economic Development Director, "Success of this effort will continue solidifying the strategic competitive advantage of a Greater Charlotte 21<sup>st</sup> Century global hub anchored by advanced manufacturing competencies which crosscut the entire commerce base of the region."

The CEDC has assembled a Project Team that includes 10 partnering organizations, each bringing a specific set of expertise, networks, knowledge base to the project and contributing an additional \$200,000 of in-kind match. These partners include the Charlotte Chamber of Commerce, Charlotte Works, the Charlotte Regional Partnership, E4 Carolinas, Deutsche Gesellschaft fuer Internationale Zusammenarbeit (GIZ), Central Piedmont Community College, South Piedmont Community College, and Rowan-Cabarrus Community College. Other college partners and the manufacturing community at large will be integral partners to the full initiative.

Advanced Manufacturing has been identified in [2012-2017 Prosperity for Greater Charlotte Economic Development Strategy](#) as a key regional strength and competency, comprised of an aggregate mix of industry sector densities, workforce skill sets, and key knowledge-based assets that provide cross-cluster support to five of the region's six primary target industry clusters: Aerospace/Defense, Automotive, Biomedical, Energy, and Logistics.

The IMCP ***Centralina Advanced Manufacturing Ecosystem Strategy*** project will produce significant long-term economic impact by:

- ensuring the Region's Advanced Manufacturing "Super-Cluster" continues to grow and mature to its full potential,
- expanding the use of Advanced Manufacturing technologies in the Region,
- stimulating investment in Advanced Manufacturing Training Centers in Community Colleges network,
- more efficiently connecting manufacturing firms with R&D and Export assets for Advanced Manufacturing entrepreneurship and innovation,
- and more effectively bridging manufacturers' needs for highly skilled workers with Advanced Manufacturing training and experience.

For more information or to read the full grant application, contact Mike Manis or Victoria Rittenhouse at the CEDC at [cedc@centralina.org](mailto:cedc@centralina.org).

## Project Background Summary:

The Centralina Economic Development Commission is the EDA-designated Economic Development District for the nine-county greater Charlotte region (the "Region") and a 501c3 component of Centralina Council of Governments. CEDC completed its five year ***Comprehensive Economic Development Strategy (CEDS)*** update for 2012-2017 with EDA approval less than one year ago (September 2012) with aligned support from HUD Sustainable Communities Grant "***CONNECT Our Future***" for additional Jobs, Workforce and Education regional research and analysis to deliver the ***2012 Prosperity for Greater Charlotte Report*** in January 2013. The IMCP project is well-aligned with the 2012 Centralina CEDS and the resulting economic foundation incorporated to "CONNECT Our Future" planning efforts.

The IMCP grant will match funding commitments secured by the CEDC to develop and operationalize this regional competency to provide critical competitive advantage across the growing clusters of Aerospace, Automotive, Biomedical, Energy, and Logistics documented in the recent research and strategic planning. The project location is the entire 9-county EDA EDD region, although the Project will impact the larger fifty mile radius economic zone of influence that constitutes the Greater Charlotte 21st Century Global Region, identified and aligned with the bi-state "CONNECT Our Future" HUD Sustainable Communities project and the Charlotte USA Regional Development Partnership.

Identified in our CEDS 2012 research is an existing and incumbent workforce skilled in traditional manufacturing that is ripe for re-training in Advanced Manufacturing skills and re-employment in the region's nationally-leading target industries that rely on Advanced Manufacturing: Aerospace/Defense, Automotive, Biomedical/Life Sciences, and Energy. As concluded by the CEDS, the Region's core competitive competencies in Advanced Manufacturing support five of the Region's primary target industries, effectively forming an Advanced Manufacturing "Super-Cluster". UNC Charlotte and the community colleges all offer nationally recognized and innovative workforce training programs in partnership with local industry. Six of the Region's community colleges have established Advanced Manufacturing Training Centers that have forged unique local industry sector partnerships for additional support of and investment in the centers.

The Region's skilled manufacturing workforce, in combination with its workforce training systems, is the critical talent pipeline for the Advanced Manufacturing "Super-Cluster" and an identified priority in the "CONNECT Our Future" funded Jobs, Workforce and Education Alignment Strategy report. This combination of assets has drawn the attention of the German government's economic development non-profit, Gesellschaft fur Internationale Zusammenarbeit ("GIZ"), which recently announced its decision to locate its first US office in Charlotte. The project includes direct partnership with GIZ to leverage the German "Skills Initiative" innovative dual track system to match industry with workforce development and a talent pipeline.

The IMCP project will meet regional needs by operationalizing a primary Centralina CEDS strategic finding, Advanced Manufacturing as a core competency of the Region, and supporting five of the Region's six target industry clusters. However, there is currently no coordinated approach to supporting the Advanced Manufacturing needs of those target industry clusters and ensuring that the Region maintains its competitive edge in this core competency that is so critical to the collaborative economy.

The purpose of this Project is to build a program that establishes such a coordinated approach and builds upon a decade-long identified strategic focus for jobs creation and steady growth of this sector. Success of this project will continue to ensure local job creation, community economic vitality, and a strategic competitive advantage of a Greater Charlotte 21<sup>st</sup> Century global hub anchored and known by its advanced manufacturing foundation.



## Centralina Economic Development Commission

*The Centralina Economic Development Commission exists as a 501 C3 public private entity to empower local communities by preparing and implementing U.S. Department of Commerce strategic plans and grant applications to create jobs and promote community economic growth.*

- ❖ Centralina Regional Economic Development District's [Prosperity for Greater Charlotte Report](#) was a US Commerce EDA Comprehensive Economic Development Strategy (CEDS) [initiative](#) to align the region's economic, workforce, and education efforts to boost prosperity in the 21st Century. Recognized with a 2013 NADO Innovation Award, key strategies ensure the regional economy can boost 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. This strategic planning provides an approach to growth and prosperity for a world class region in support of job growth for both rural and urban commerce and further solidifying a *Regional Competitive Advantage* for the economic foundation of globally competitive, vibrant and resilient local communities.
- ❖ **A Jobs, Workforce and Education Alignment Study** produced within the [Prosperity for Greater Charlotte Report](#) project yielded recommendations to align with the 14-county bi-state region's target industries and competencies to allow educational institutions, workforce and economic developers, and industry sector partnerships to:
  - Identify future "talent pipeline" needs and bridge gaps within existing regional education and workforce training systems;
  - Adapt educational programs and career planning tools more effectively; and
  - Ensure target industry clusters are matched with a supply of qualified workers and aligned with actual job growth demands.
- ❖ [Prosperity for Greater Charlotte Report](#) supported two Charlotte Global Competitiveness Summits, in August 2012 and February 2013, that brought together 500+ business, education and community leaders to engage the Greater Charlotte Region's role in the global marketplace and continues as a contributing framework.
- ❖ Centralina's CEDS was incorporated into NC Tomorrow, a NC Department of Commerce planning initiative to develop a statewide economic strategy and also supported multiple recent EDA Public Assistance Awards of over \$3.5 million to regional colleges to expand training centers aligned with regional industry growth needs.
- ❖ The CEDC was awarded a \$200,000 U.S. Commerce EDA "Investing in Manufacturing Communities Partnership" (IMCP) Strategy Grant by the White House and US Department of Commerce on September 26, 2013.

# GLOBAL COMPETITIVENESS SUMMIT

AND



in partnership with



Join Central Piedmont Community College, the *Charlotte Business Journal* and other sponsors for 2014 Global Competitiveness Summit and the *Charlotte Business Journal's* annual Advanced Manufacturing Awards. Begun in 2010 with an initiative of the Centralina Economic Development Commission, these awards highlight advanced manufacturing in our region and promote a hot spot of bright minds, new ideas, innovative talent and resources.

Engage with business leaders, educators, economic developers and policymakers as we work to fulfill the vision of making Charlotte a global hub of commerce and celebrate process excellence, leadership and collaboration in Advanced Manufacturing displayed in our region during 2013.

Mark your calendar for the Summit and Awards event on March 12 at CPCC's Harris Conference Center. Eric Spiegel, CEO and President of Siemens Corp., will be among the confirmed and invited speakers.

Also, look for a Special Report on manufacturing and profile of award winners in the March 7 issue of the *Charlotte Business Journal*.

For more information about the awards and instructions on how to nominate: <http://www.bizjournals.com/charlotte/nomination/61801>

To learn more about the March 12 event: [www.cpcc.edu/global/summit](http://www.cpcc.edu/global/summit)

Seating is limited and registration will open after the January 10, 2014 sponsor and partner participation deadline.

To become a sponsor or partner please contact Gail Dougherty at [gdougherty@bizjournals.com](mailto:gdougherty@bizjournals.com) or 704-973-1118.

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## Centralina Council of Governments (CCOG)

*Working with Our Region's Rural and Urban Communities to  
Grow Jobs and the Economy and Improve Quality of Life*

### **We are the Greater Charlotte Region and we are growing fast.**

- The Greater Charlotte region has been one of the fastest growing large regions in the nation over the last decade and is projected to continue to grow rapidly. The nine-county region is the home of more than 1.9 million people (2010 Census).
- The Greater Charlotte region is one of the main economic centers in the state, and is ranked one of the "World's 100 Most Competitive Global Cities in 2013" (IBM Global Business Services Report with Site Selection Magazine, Nov. 2013).
- It is important that we continue to build and support an aggressive economic strategy that grows jobs and the economy and improves quality of life throughout our region, for both rural and urban areas.
- With business relocation decisions now based on the collaborative assets of entire regions, not just cities, it is important that the region's economic development assets align. This will ensure our best advantage for rural and urban areas alike to share in economic growth.
- The Centralina Council of Governments, working through the Centralina Economic Development Commission, Centralina Workforce Development Board and the CONNECT Our Future project, collaborates with rural and urban public, private and non-profit partners throughout the region. We align strategies to benefit our rural and urban communities' economic development, workforce development and quality of life of all residents.

### **Here's how we're getting results for the State and the Greater Charlotte Region.**

- **Economic Development through "Prosperity for Greater Charlotte"** is a U.S. Commerce EDA Comprehensive Economic Development Strategy initiative which aligns the region's economic, workforce and education efforts to attract business and industry and support job growth for both rural and urban commerce in the region. The initiative links the region's workforce skills and strengths, education assets, and infrastructure to the needs of high-growth and emerging industries, and is the winner of a 2013 NADO Innovation Award.
- **Linking Jobs, Workforce and Education** – The groundbreaking work to align the region's jobs, workforce and education in the Prosperity for Greater Charlotte Report will soon be a real-time tool for career seekers in the region. Centralina Workforce Development is leading in the development of Centralina Career Headlight, a web-based portal that utilizes local data and will help career seekers and students identify in-demand occupations in the region and their counties, as well as the education

(Continued on Page 2)





Centralina Council of Governments

(Continued from Page 1)

required and available regionally to get those jobs. By helping students and job seekers in rural communities to identify job opportunities and skills training nearest their home, Career Headlight can help communities retain youth and local workers.

- **Connecting Career Seekers with Jobs and Workforce Training** – The Centralina Workforce Development Board is working with other local boards through a Regional Integrated Service Delivery Leadership Team in implementing NCWorks, the state integrated jobs and workforce training services delivery system.
- **Promoting Advanced Manufacturing** – The U.S. Economic Development Administration has just awarded a \$200,000 Investing in Manufacturing Communities Partnership grant for the Centralina Advanced Manufacturing Ecosystem Strategy Development project to create a comprehensive advanced manufacturing implementation plan for our region.

The CEDC has assembled a Project Team that includes 10 partnering organizations, each bringing a specific set of expertise, networks and knowledge base to the project and a total in-kind match of \$200,000. These partners include the Charlotte Chamber of Commerce, Charlotte Works, the Charlotte Regional Partnership, E4Carolinas, Deutsche Gesellschaft fuer Internationale Zusammenarbeit (GIZ), Central Piedmont Community College, South Piedmont Community College, and Rowan-Cabarrus Community College. Other college partners and the manufacturing community at large will be integral partners to the full initiative.

- **Developing a Framework for Growth** – Retaining the unique character of our region's communities and ensuring they are all partners in economic growth is one of the goals of the CONNECT Our Future project. CONNECT is a three-year project funded by a \$4.9 million HUD Sustainable Communities grant to align and build on existing local plans and engage the region in creating a regional growth framework. That framework will help the region and rural and urban communities to address the growing population and the needs for employment, transportation, housing, infrastructure, and a healthy environment through 2050.
- **Engaging Residents in Their Future** – With the support of local elected leaders, CONNECT Our Future is using extensive local public engagement to define a preferred future regional growth framework. Over the past 18 months, more than 3,000 people throughout the region have participated locally in open houses, community growth workshops, a Regional Reality Check event and community focus groups held in the 14 counties of the CONNECT region.
  - ◆ **Nov. 2012 to Feb. 2013 – Open Houses and Small Groups** – Held in each county to understand what people value about their communities and want for the future. More than 2,200 participants.
  - ◆ **June 2013 – Regional Reality Check Event** – Nearly 400 community, business and special interest leaders gathered for an interactive growth planning exercise and map building.
  - ◆ **Sept. to Oct. 2013 – Community Growth Workshops** – Fifty-seven two-hour workshops held in all 14 counties asking residents to map out the projected growth of their counties. More than 1,100 participants.

**For more information contact Centralina Council of Governments  
Executive Director Jim Prosser, 704-348-2703, [jprosser@centralina.org](mailto:jprosser@centralina.org).**





**NADO 2013 INNOVATION AWARD WINNER**

**PROSPERITY FOR GREATER CHARLOTTE PROJECT**

**CENTRALINA COUNCIL OF GOVERNMENTS & CENTRALINA ECONOMIC  
DEVELOPMENT COMMISSION**

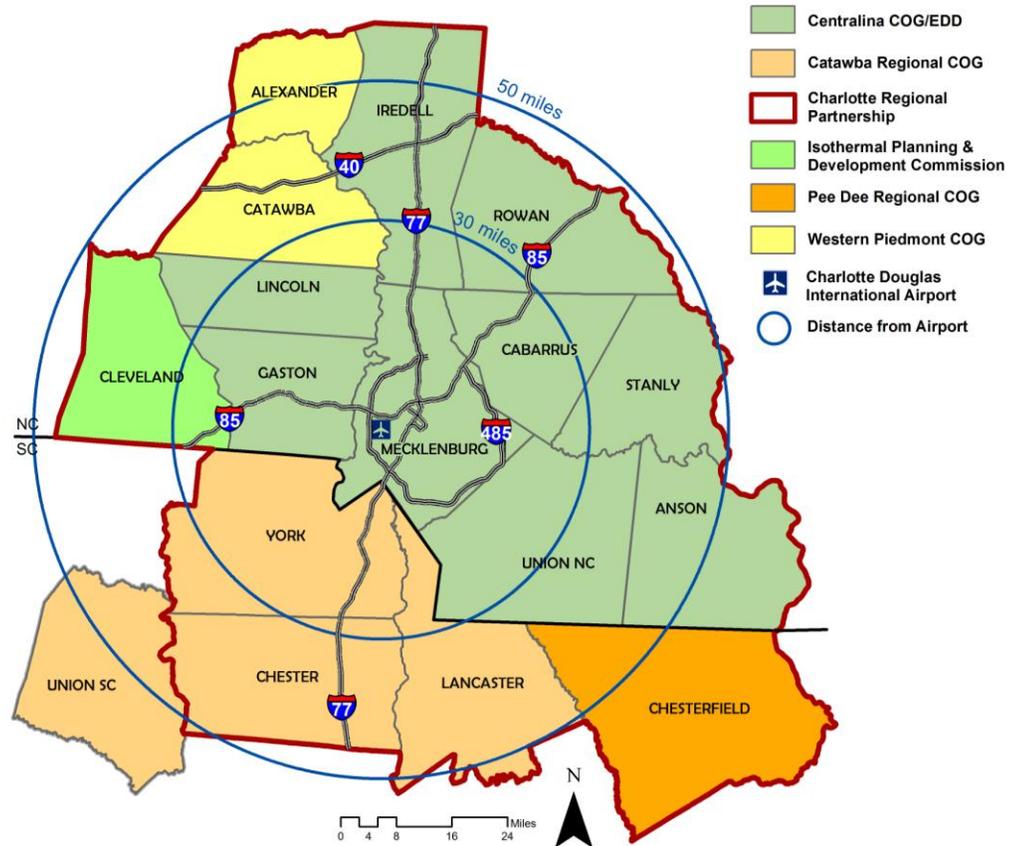
**NADO**  
NATIONAL ASSOCIATION OF DEVELOPMENT ORGANIZATIONS  
**ATC 2013**  
2013 ANNUAL TRAINING CONFERENCE PROGRAM

August 24–27, 2013 | Hilton San Francisco, Union Square | San Francisco, CA

NADO.ORG

## Greater Charlotte Strategic Economic Assessment Overview

The **Prosperity for Greater Charlotte** project and the HUD “**CONNECT Our Future**” Sustainable Communities initiative collaboratively partners the Centralina Council of Governments, Catawba Regional Council of Governments, Centralina Economic Development Commission, and the Charlotte Regional Partnership in an innovative, integrated approach that is essential to support the region’s future growth and prosperity. In May 2012, the Centralina Economic Development Commission and this coalition of regional partners began a strategic assessment process to evaluate the 17-county greater Charlotte economy and identify strategies to boost economic and educational success.



In anticipation of dynamic economics that will drive future global competitiveness, our innovative strategic planning design dictated inclusion of seventeen counties in the global competency analysis, parallel with the Charlotte USA footprint. ***This collaborative community network shown on the map illustrates the fifty-mile radius economic zone that constitutes the Greater Charlotte 21<sup>st</sup> Century Global Region.***

The project culminates in three strategic plans: the *Centralina Comprehensive Economic Development Strategy* and the integrally linked Greater Charlotte region *Jobs, Workforce & Education Alignment Strategy* with the additionally supported, but independently completed, *Catawba Region Comprehensive Economic Development Strategy* of the Catawba Regional Council of Governments. The resulting Centralina strategy calls on regional leadership to heighten collaborative efforts around five goals. Full detail on the strategies and all project reports, along with the supporting analysis can be found at the links [www.ProspersityForGreaterCharlotte.com](http://www.ProspersityForGreaterCharlotte.com) and [www.ConnectOurFuture.org](http://www.ConnectOurFuture.org)

# Prosperity for Greater Charlotte

[www.ProsperityForGreaterCharlotte.com](http://www.ProsperityForGreaterCharlotte.com)

## **NADO 2013 Innovation Award – *Prosperity for Greater Charlotte***

The 14-county bi-state Charlotte region initiated “*CONNECT Our Future*” HUD Sustainable Communities Project in February 2012 to create a growth framework to align strategies across the region to grow the economy, improve quality of life, and control the cost of government. Timing and alignment with “*CONNECT Our Future*” allowed support of required five year updates in 2012 of US Commerce EDA Comprehensive Economic Development Strategies (CEDs) for the North Carolina 9-county Centralina Economic Development District (EDD) and the South Carolina 4-county Catawba Regional Council of Governments EDD.

This collaborative process produced the ***Prosperity for Greater Charlotte Report, An Economic Strategic Assessment for the Greater Charlotte Region***. The economic plans defined 21<sup>st</sup> Century priorities and goals, objectives, and tactics to enhance the region’s overall business environment and maximize industry clusters development while promoting a balanced quality of life. Innovatively this effort also served to deliver crucial databases of economic, demographic, workforce, education and related community assessments for the “*CONNECT Our Future*” process and outcomes at the most local levels of both rural and urban counties that comprise the region while partnering as a cohesive globally competitive regional economic zone.

The ***Prosperity for Greater Charlotte Report***, through the innovative, unique addition of the Jobs, Workforce & Education Alignment Strategy, created a guide for understanding of long-term demand for occupations and skills across the high-growth economic sectors of the ***Greater Charlotte 21<sup>st</sup> Century Global Region***. The Jobs, Workforce and Education Strategy allows educational institutions, workforce and economic developers, and industry sector partnerships to;

- identify future “talent pipeline” needs and bridge gaps within existing regional education and workforce training systems at both a regional and individual county level;
- adapt educational programs and career planning tools more effectively;
- and ensure target industry clusters are matched with a supply of qualified workers and aligned with actual job growth demands.

The Prosperity for Greater Charlotte Report and *CONNECT Our Future* acknowledged that regions with cohesive and realistic plans will grow in a more organized fashion and better leverage the collective assets in each of their jurisdictions that comprise a regional zone of economic influence. The greater Charlotte bi-state region is composed of interrelated sub-regions that act together as a single global economic unit, “Charlotte USA”. CCOG and CEDC with partners, recognized a unique opportunity to align the missions and priorities of several projects in this innovative approach to these initiatives; the EDA funded CEDS Five Year updates; a HUD Sustainable Communities Regional Planning Grant (CONNECT); and the NC Department of Commerce’s statewide economic strategy, NC TOMORROW.

Centralina Council of Governments (CCOG) was the lead applicant for the bi-state HUD Sustainable Communities award; in partnership with Catawba Regional Council of Governments (CRCOG). The lead agent for the *Prosperity for Greater Charlotte Report* was Centralina Economic Development Commission (CEDC), a 501c3 unit of CCOG and EDA Economic Development District for the Centralina region.

## Prosperity for Greater Charlotte Project- Results to Date

- ❖ Integrated with the HUD Sustainable Communities Initiative *CONNECT Our Future*, two (2) regional Economic Development District's CEDS plans were completed and updated for the 2012-2017 period, and included additional research that better aligned regional infrastructure, talent and assets.
- ❖ Jobs, Workforce and Education Alignment Strategy study utilized for implementation of a unique pilot project called "Career Headlight". This web-based platform will provide quick and efficient matching of workers and students with local demand based careers and the training resources.
- ❖ Centralina CEDS was incorporated into NC Tomorrow, a NC Department of Commerce planning initiative to develop a statewide economic strategy.
- ❖ Charlotte Regional Partnership "Charlotte USA" Strategic Marketing plan updated in Q1 2013 utilized Prosperity for Greater Charlotte research and findings and the CEDS project consultant team.
- ❖ Charlotte Chamber of Commerce incorporated the CEDS database and research into planning for their upcoming Chamber Strategic Plan Initiative 10 year update.
- ❖ Project supported two Charlotte Global Competitiveness Summits, in August 2012 and February 2013, that brought together 500+ business, education and community leaders to engage the Greater Charlotte Region's role in the global marketplace.
- ❖ Ongoing foundational Economic data and local county integration to "CONNECT Our Future" community workshops and Regional Preferred Development Scenario "Blueprint" phases for Charlotte 2050 Growth Framework.

**Inquiries and Information requests may be directed to the:**

**Centralina Economic Development Commission**

**Attention: Mike Manis**

**525 North Tryon Street, 12th Floor**

**Charlotte, NC 28202**

**Phone: 704-372-2416 / E-mail: [mmanis@centralina.org](mailto:mmanis@centralina.org)**





Executive Summary:  
**Prosperity for Greater Charlotte**

**An initiative to align the region's economic, workforce, and education efforts to boost prosperity in the 21<sup>st</sup> 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**

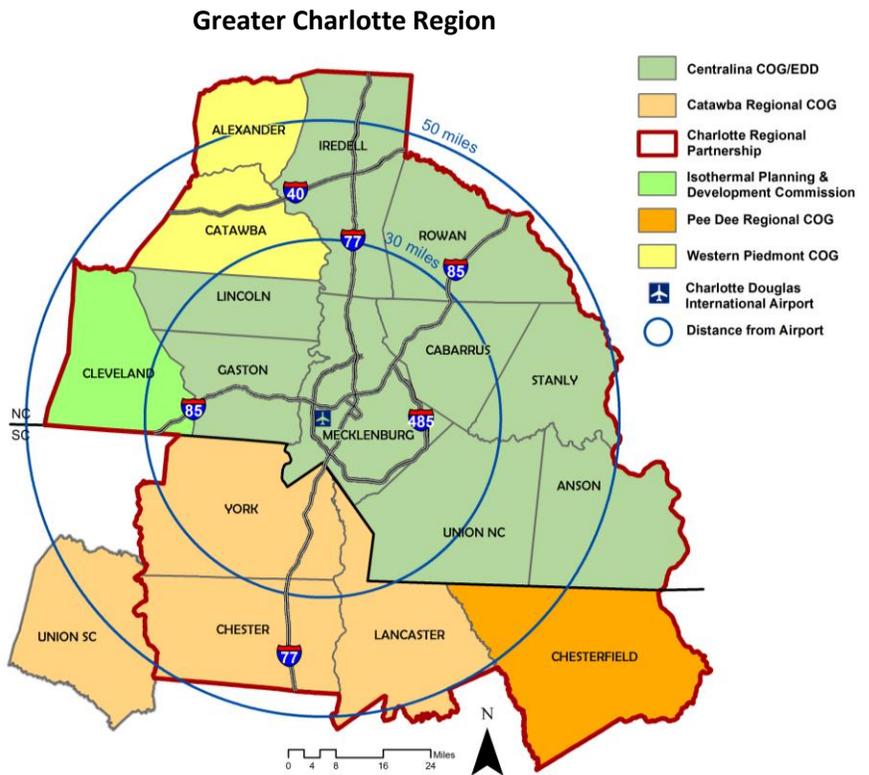
**Catawba Regional COG Comprehensive Economic Development Strategy**



# Strategic Economic Assessment

## Executive Summary

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 the Charlotte Regional Partnership in an innovative, integrated approach that is essential to support the region’s future growth and prosperity. In May 2012, the Centralina Economic Development Commission and this coalition of regional partners began a strategic assessment process to evaluate the 17-county greater Charlotte economy and identify strategies to boost economic and educational success.



In anticipation of dynamic economics that will drive future global competitiveness, our innovative strategic planning design dictated inclusion of seventeen counties in the global competency analysis, parallel with the Charlotte USA footprint. This collaborative community network shown on the map illustrates the fifty-mile radius economic zone that constitutes the Greater Charlotte 21<sup>st</sup> Century Global Region.

The consulting team of Avalanche Consulting, Inc., the Council for Adult and Experiential Learning (CAEL), and McCallum Sweeney Consulting led the project’s technical analysis. An Advisory Council comprised of 39 industries, public sector, nonprofit, and economic development leaders provided guidance and input throughout the project.

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.

### Goals of the Centralina Strategic Plan

The project culminates in three strategic plans: the *Centralina Comprehensive Economic Development Strategy* and the integrally linked Greater Charlotte region *Jobs, Workforce & Education Alignment Strategy* with the additionally supported, but independently completed, *Catawba Region Comprehensive Economic Development Strategy* of the Catawba Regional Council of Governments. The resulting Centralina strategy calls on regional leadership to heighten collaborative efforts around five goals. Full detail on the strategies and all project reports, along with the supporting analysis can be found at these links:

[www.ProsperityForGreaterCharlotte.com](http://www.ProsperityForGreaterCharlotte.com)  
[www.ConnectOurFuture.org](http://www.ConnectOurFuture.org)

<b>Workforce &amp; Education</b>	Prepare the region’s workforce and students with skills, competencies, and knowledge that align with target industry needs.
<b>Entrepreneurship &amp; Innovation</b>	Enable a highly innovative entrepreneurial climate that drives the creation of high-growth firms.
<b>Infrastructure</b>	Ensure the region has a highly connected, efficient multimodal transportation system and an abundant supply of shovel-ready sites.
<b>Business Climate</b>	Create a globally competitive region around the target industries and a strong business brand worldwide.
<b>Quality of Life</b>	Continue investing in the region's lifestyle amenities and making the region attractive to a young professional workforce.

## Prosperity for Greater Charlotte: Project Components

An **Economic & Demographic Assessment** examines historical growth trends in the Greater Charlotte Region and the individual counties. Economic datasets presented and discussed include overall jobs, employment by industry, unemployment, shift-share analysis of regional industries, payroll, average salaries, and gross regional product. Demographic data presented includes overall population trends, age distribution, and incomes.

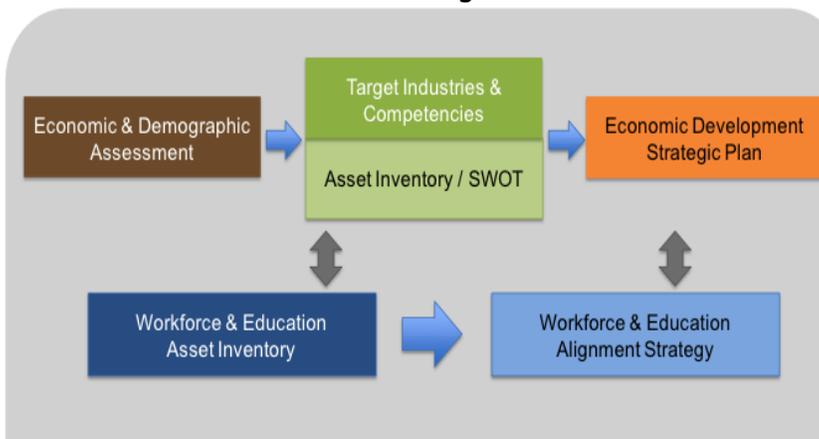
The second component, **Asset Inventory / Centralina SWOT**, inventories and evaluates key economic development assets in the Greater Charlotte Region. The report identifies assets in several categories: Workforce & Education, Entrepreneurship & Innovation, Infrastructure, Business Climate, and Quality of Life. For each of these topics, the report includes a Centralina SWOT (Strengths, Weaknesses, Opportunities, & Threats) assessment summarizing the key takeaways for the Centralina Comprehensive Economic Development Strategy.

Unique to this project is the addition to the above components of a **Workforce & Education Asset Inventory**. This report inventories all college and K-12 educational programs that address target cluster needs; identifies broad workforce and education provider capacities; recognizes existing workforce skills and competencies; and examines national and global workforce skill trends. This inventory provides an essential perspective for understanding regional strengths and industry objectives that link to jobs and industry growth of the future.

The second phase of the project builds on the previous reports, identifying and validating target industry clusters for the Greater Charlotte Region. The **Target Industries & Competencies** component includes a cluster analysis of regional industries, examining growth trends, location quotients, and employment bubble charts. The project team evaluated potential target industries by filtering candidates through numerous criteria, including the regional asset fit, national industry trends, and match to regional economic development goals. The Target Industries & Competencies analysis culminates in a list of target industry recommendations and profiles for each industry that is built upon regional cross cutting competencies across the primary clusters. This dynamic provides place based globally competitive advantages for the Greater Charlotte Region as a mega-region component on the national and international front.

The project culminates in three strategic plans: the **Centralina Comprehensive Economic Development Strategy** and the integrally linked Greater Charlotte Region **Jobs, Workforce & Education Alignment Strategy** with the additionally supported, but independently completed, **Catawba Region Comprehensive Economic Development Strategy** of the Catawba Regional Council of Governments.

### Process Diagram



### Why This Plan

Did you know that the region's population is expected to double within 40 years? Did you know that more than 50% of all workers commute across a county line each day to get to work? Successful economic development today requires a plan to be in place. In fact, site selectors and companies now look to a region's plans as an indicator of where a community plans to be, how it plans to get there, and which institutions are accepting responsibility. Regions with cohesive and realistic plans will grow in a more organized fashion and better leverage the assets in each of the component counties or jurisdictions that comprise the area of economic influence.

**The Prosperity of the Greater Charlotte Region depends on our ability to plan for the future, collaborate across jurisdictions, and communicate our shared priorities to citizens, businesses and the public sector.**

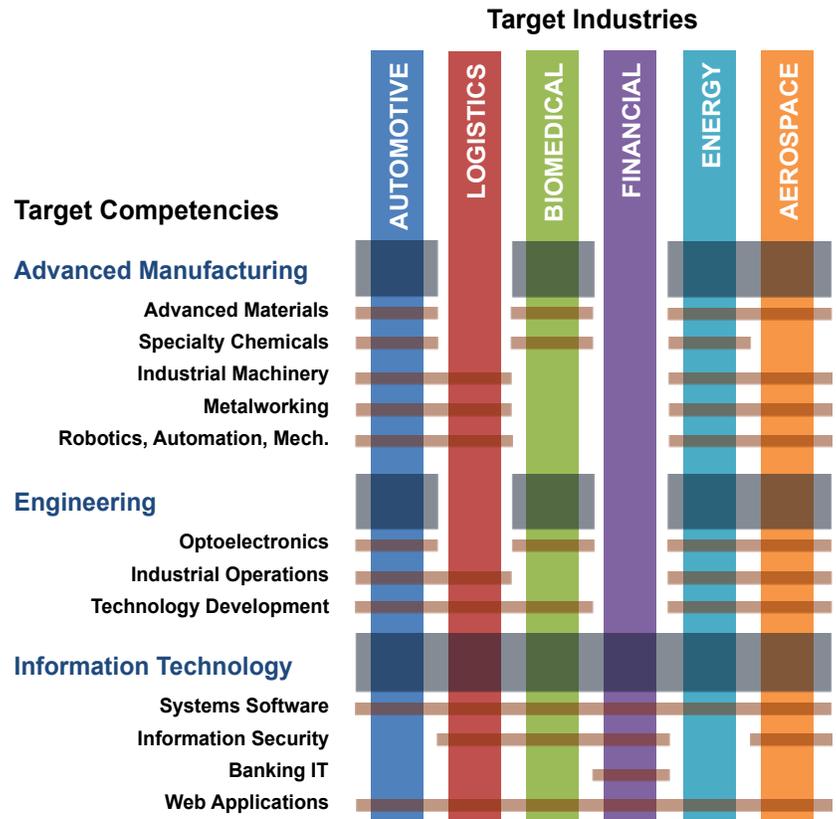
# Target Industries and Competencies

The Greater Charlotte Region has numerous competencies supporting industry growth, from specializations in Advanced Materials and Robotics to Engineering expertise in Optoelectronics and Industrial Operations. The diagram to the right illustrates the identified and recommended Target Industries and Target Competencies for the Greater Charlotte Region and how they intersect. Below, a detailed matrix indicates the specific niche industries within the six major industries to be targeted. Emerging industries are identified in italics.

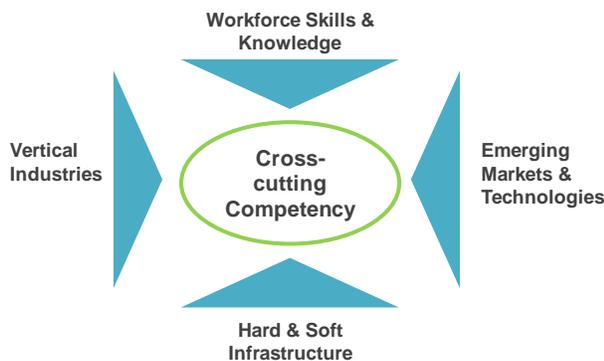
What are “Competencies” and why include them as targets? Communities are the unique combination of their workforce skills, technology and product knowledge, ability to produce and manufacture, and ability to market and deliver products to their

consumers. Today’s challenge for communities is to build multiple “competencies” that not only ensure a wide foundation to existing clusters but spark new industries and products – to not work just to protect what you have, but to focus on the new products and markets that will create new jobs.

## Target Competency Matrix – Greater Charlotte Region



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



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#### Competency Matrix: Connecting Competencies and Industries

A vertical industry is one that is focused on a specific market or product, such as aerospace, automotive, and biomedical. These are the “industries” that usually comprise a target industry plan, and are usually listed on an economic development website as the region’s focus.

A horizontal (or platform) competency can consist of a unique technology, workforce skill, or physical asset that supports numerous vertical industries. A multimodal transportation network (port-rail-highway) is one example, as it can serve any number of industries that might manufacture, test, or distribute their goods locally. Competencies are also workforce-specific, such as skills in machining, IT, advanced materials, or design. Competencies can influence some or all industry targets in a region.

As shown in the diagram above, the combination of industries and competencies form a lattice of connections that make a region unique. The Greater Charlotte Region’s future economic development activities should focus both on its vertical target industries and its horizontal competencies that support target and other industry success.

## Detailed Targets and Niche Targets

### Target Industries

*Italics = emerging*

<b>Automotive</b>	<b>Logistics &amp; Global Commerce</b>	<b>Biomedical &amp; Health</b>
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	<i>Bioinformatics &amp; Genomics</i>
Electronic Components	Paper & Wood Product Mfg/Dist.	<i>Nutritional Sciences</i>
<b>Financial Services</b>	<b>Energy</b>	<b>Aerospace &amp; Defense</b>
International & Domestic Banking	Nuclear Components	Aircraft parts suppliers
Investment Banking	Energy Equipment & Components	UAVs
Insurance	Energy Generation & Dist.	Defense Contractors
Back Office	<i>Clean Energy</i>	Defense Research
<i>Financial IT</i>		
<b>Corporate Headquarters</b>	<b>Tourism</b>	<b>Film</b>

### Target Competencies

<b>Advanced Manufacturing</b>	<b>Engineering</b>	<b>Information Technology</b>
Advanced Materials	Optoelectronics	Data Centers
Specialty Chemicals	Industrial Operations	Systems Software
Industrial Machinery	Technology Development	Information Security
Metalworking		Banking IT
Chemicals		<i>Web applications</i>
Robotics, Automation, Mechatronics		

### Aspirational Targets

<b>Software</b>	<b>Health Care</b>	<b>Financial Services</b>
Logistics IT	Clinical Testing	Mobile Banking IT
Data Visualization	Health Care IT	

## The Centralina EDD Region's 7 Priorities

1. Improving basic K-12 education remains a pressing concern and priority for the region.
2. College and university participation in economic development must be strengthened so feedback mechanisms are in place to allow faster deliberate response by the education community to changes in industry needs and alignment of training\curriculum of the future.
3. The region must achieve realignment of its existing workforce skills toward the targeted industries and competencies that will generate new jobs in the future as well as enhance the same career pathways link to students and younger generation.
4. New and emerging industries and technologies must be supported through improved entrepreneurial support systems and targeted infrastructure improvements.
5. The region's industries must increase integration of new technologies to remain competitive (build on 2007 CEDS Advanced Manufacturing strategy) and leverage new logistics assets and infrastructure to access global markets (such as new intermodal facility at the airport and regional telecom infrastructure).
6. Regional collaboration is strong in economic development but should be strengthened by strategic collaboration in entrepreneurship, infrastructure planning, education and workforce development planning.
7. Marketing initiatives will be needed to broadcast the new and "updated" Greater Charlotte Region image to its local citizens and global businesses and tourists.

## Entrepreneurship & Innovation

**Objective 1:** Coordinate and boost support services for entrepreneurs across the region.

**Objective 2:** Support creation of physical spaces and virtual incubators to house entrepreneurs.

**Objective 3:** Increase the available local pool of venture, angel, and other financial capital.

**Objective 4:** Expand entrepreneurship education into all levels of education.

**Objective 5:** Expand university research in the region and connect researchers to local companies.

## Infrastructure

**Objective 1:** Increase the availability of shovel-ready sites and business parks.

**Objective 2:** Support the ongoing development of a multimodal strategy for the region that empowers global businesses to design, manufacture and distribute products from or through the Greater Charlotte region.

**Objective 3:** Increase strategic planning and funding for major transportation projects to better connect residents with job opportunities and growth centers throughout the region.

**Objective 4:** Support the CONNECT regional preferred development scenario planning for alignment of system wide enhancements to maintain economic competitiveness and meet growth impacts.

## Business Climate

**Objective 1:** Support economic development collaboration across the region.

**Objective 2:** Expand and improve policies designed to attract and grow industries to the region.

**Objective 3:** “Globalize” the region’s businesses and institutions by promoting and developing the competencies of local citizens.

**Objective 4:** Market the region to businesses worldwide and strengthen the region’s business brand

## Quality of Life

**Objective 1:** Continue to make the region more attractive a young professional workforce.

**Objective 2:** Continue to enhance downtowns in the region and invest in arts, non-profits and entertainment venues.

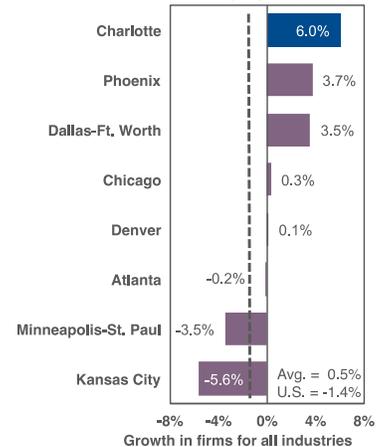
**Objective 3:** Encourage the promotion of tourism through regional marketing campaigns.

**Objective 4:** Increase awareness and understanding of all ethnic cultures and the increasing multinational community that visit or work in the region.

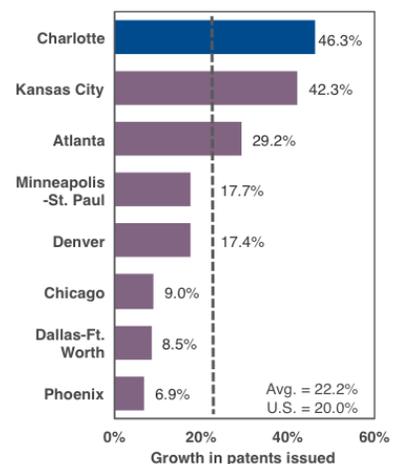
**Objective 5:** Ensure that an adequate supply and variety of housing options are available to current and future residents.

*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:*

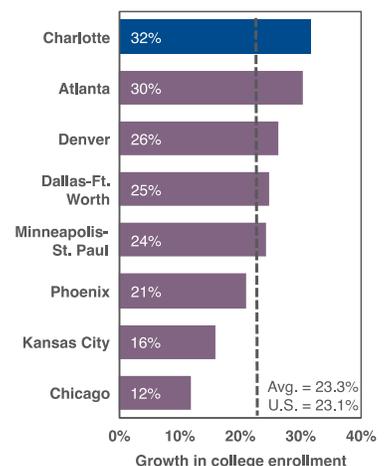
**Growth in Micro Firms, 2005-2010  
(Fewer than 10 Employees)**



**Patent Growth, 2006-2010**

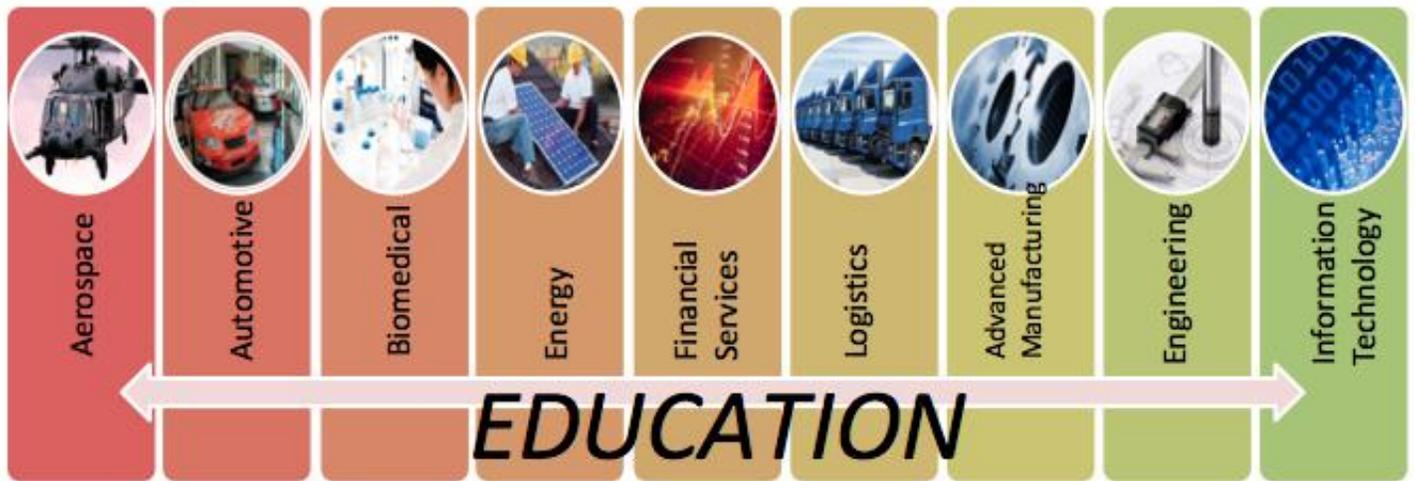


**College Enrollment Growth, 2005-2010**



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

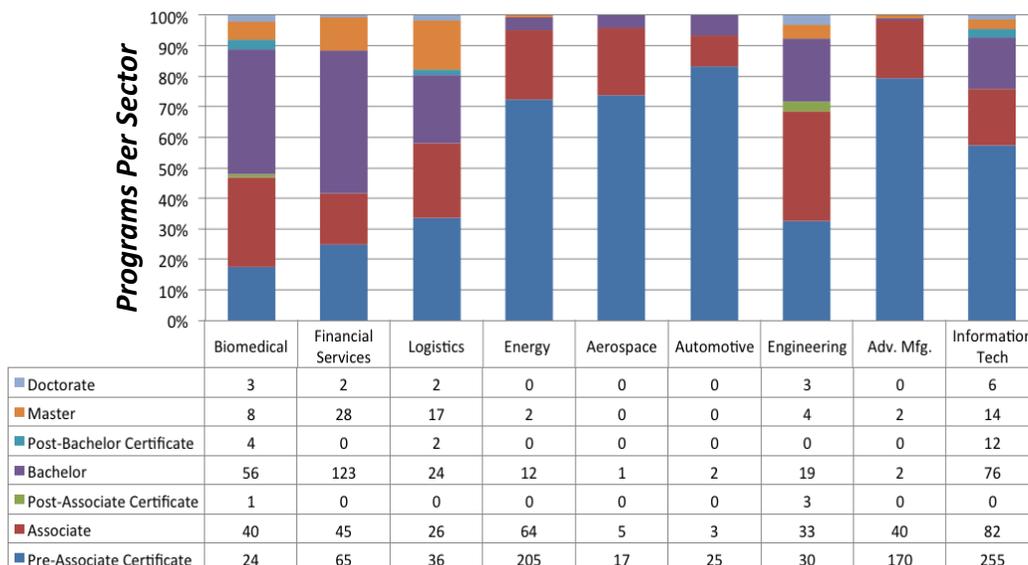
- OBJECTIVE 1:** Expand Target Sector Education and Training Alignment Programs.
- OBJECTIVE 2:** Expand Target Sector and Competency Career Awareness and Connections.
- OBJECTIVE 3:** Formalize Structures for Workforce System Partnerships across the Region.
- OBJECTIVE 4:** Strengthen Regional Collaboration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



The Workforce & Education research compared college graduates by degree for the region against the long-term demand for occupations and skills. Skills areas were identified for the near-term that were either in short supply, at risk of shortages, or in balance, as shown on the right:

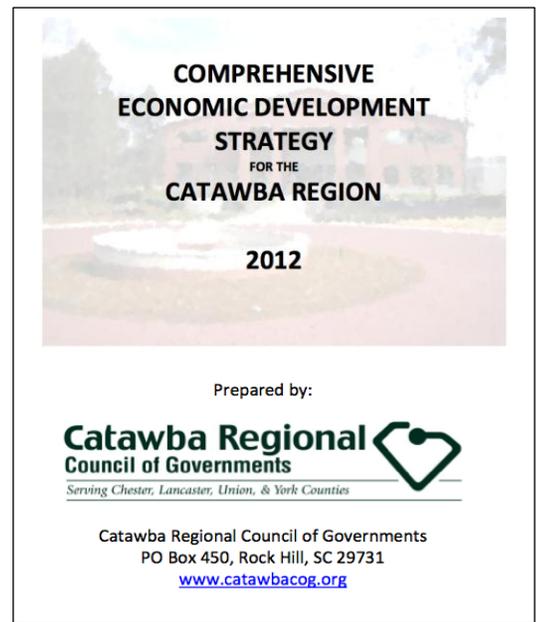
A key component of this strategic planning process is to help the regional economy boost its job growth rate by linking the region's workforce skills and strengths, education assets, and infrastructure to the needs of high-growth and emerging industries. A review of the region's 47 public and private institutions yielded a complete inventory of educational programs that serve the needs of the region's target industries and competencies, as shown below:

- Occupations with Supply Shortages**
  - Computer / Software
  - Logistics / Transportation
  - Engineering – Nat. Resources & Industrial
  - Hospitality & Personal Services
  - Legal
- Occupations at Risk of Shortages**
  - Medical – Doctors, Nurses, Aides, Technicians
  - Mechanics
- Occupations in Balance with Demand**
  - Financial and Business
  - Back Office / Administrative Support
  - Education



## Strategic Assessment Report Part III

Catawba Regional Council of Governments completed a detailed Catawba Region CEDS for the four South Carolina counties of York, Lancaster, Chester, and Union that comprise the CRCOG Economic Development District. The regional data and supporting research from the Prosperity for Charlotte project was provided in support of the process for their Strategic Planning and subsequent independent final report led by the Catawba Region CEDS Advisory members for the South Carolina CRCOG jurisdiction. The full report that is inclusive of all local SWOT analysis with Goals and Objectives for the Catawba Region is included as an integral component (Part III) of the regional assessment project documents.



## Prosperity for Greater Charlotte Project

Inquiries and Information requests may be directed to the:

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Charlotte, NC 28202

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E-mail: [cedc@centralina.org](mailto:cedc@centralina.org)



[www.Prospersity for Greater Charlotte.com](http://www.Prospersity for Greater Charlotte.com)

The Centralina Economic Development Commission (CEDC), established in 2005 by Centralina Council of Governments, promotes a diversified and innovative regional economic base, advocates sustainable growth, and supports jobs development through expansion, retention, and recruitment of business and industry. The CEDC region of nine counties, also delineated as North Carolina COG Region F, is designated by the U.S. Department of Commerce, Economic Development Administration (EDA) as the approved Centralina Economic Development District (EDD). The CEDC is responsible for developing and maintaining the regional Centralina Comprehensive Economic Development Strategy (CEDS) and administering the Centralina Economic Development District.

Our CEDS economic development planning process has been integrated with the CONNECT Our Future regional project framework and will provide key components to the bi-state Greater Charlotte 2011 HUD Sustainable Communities Grant. This strategic planning will provide an approach to growth and prosperity for a world class region that supports businesses and job growth and ensures globally competitive vibrant and resilient communities.



Vibrant Communities – Robust Region



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Project  
Consulting Team:

