

# Comprehensive Economic Development Strategy 2022-2026

Prepared by: **MRB** | *group*



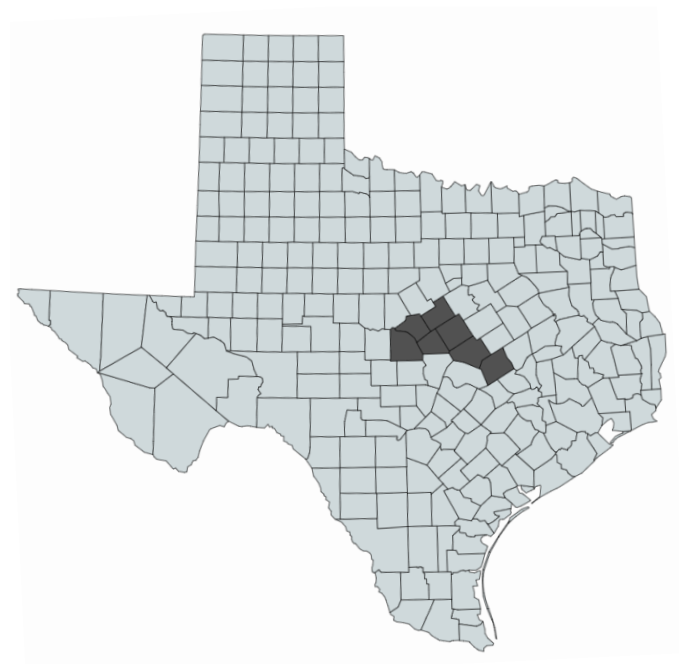


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# Introduction

The counties of Bell, Coryell, Hamilton, Lampasas, Milam, Mills, and San Saba comprise the Development District of Central Texas (DDCT). The DDCT serves the Central Texas Council of Governments' (CTCOG) seven-county planning area providing economic development assistance.

The U.S. Economic Development Administration requires that each Economic Development District produce a Comprehensive Economic Development Strategy (CEDS) every five years. This ensures that each district maintains an up-to-date strategy to establish economic goals, address challenges facing its region, and guide development priorities. This CEDS, developed amid the COVID-19 pandemic, includes planning for economic recovery and resilience.

## CEDS Steering Committee

Mark Allyn, Morgan's Point Resort Economic Development Corporation

Charley Ayers, Workforce Solutions of Central Texas

J. Rhett Parker, City of Cameron (former)

Tammy Cockrum, Rogers Municipal Development District

Kerry Fillip, Nolanville Economic Development Corporation

Brian O'Connor, Greater Killeen Chamber of Commerce

Dean Roome, City of Bartlett

Keith Sledd, Heart of Texas Defense Alliance





# Summary Background

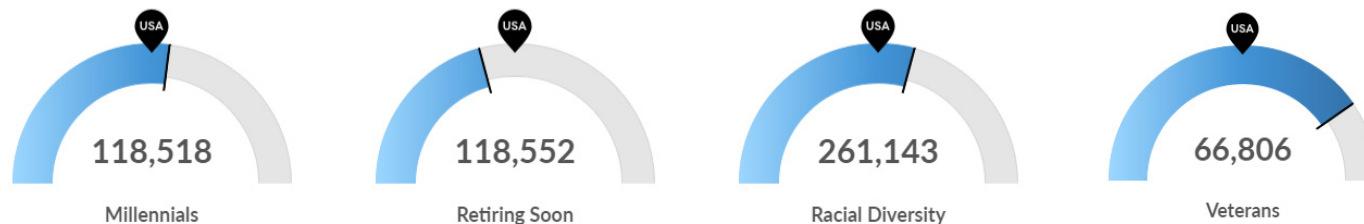
*For additional detail on the economic conditions of the region, see the appendices.*

## Demographics

The population of the seven-county DDCT/CTCOG region has grown significantly over the past decade, like Texas as a whole, and is expected to increase by 7.4% from 2020 to 2025. The region was home to over 527,000 residents in 2020—up 17% since 2010—across 189,022 households. The median age is 33, about two years younger than the State median age. Over 15% of the region's residents possess a Bachelor's Degree (5% below the national average), and 11% hold an Associate's Degree (3% above the national average).

As compared to national averages for an area of the CTCOG region's size, the region is considerably more diverse, has more millennials (ages 25-39), and has a smaller cohort of residents nearing retirement. The region is home to nearly 67,000 veterans, owing to the presence of Fort Hood.

The region's median household income is \$53,449, over \$5,000 lower than the Texas figure. Across Central Texas, 13.8% of residents live in poverty, somewhat lower than the statewide figure of 14.7%. Like many areas of the country, the coronavirus pandemic and related business shutdowns in 2020 caused significant job losses, impacting every major industry but especially leisure and hospitality. Unemployment stood at 6.6% in June 2021, up from a pre-pandemic rate of 3.9% in 2019, but down from a peak in 2020.



CTCOG Region demographic indicators in comparison to national averages for an area of its size



## Industry Snapshot

The Government sector (including the military) accounts for 37.6% of jobs in the CTCOG Region, followed by Health Care and Social Assistance; Retail Trade; and Accommodation and Food Services. The region has uniquely high concentrations of jobs in the Federal Government-Military; Pipeline Transportation of Crude Oil; and Support Activities for Air Transportation industries.

The region gained about 4,947 jobs from 2011-2021, a growth of 2.4%, which was a much slower rate than statewide job growth. Over the next ten years, the CTCOG Region is projected to add 13,511 jobs, many of them coming from the Health Care and Social Assistance; Accommodation and Food Services; Educational Services; and Retail Trade sectors. Amid this growth, which is on par with the projected national growth rate, the CTCOG Region's Government sector will continue to shrink.

Real estate data shows that market rents for industrial space currently stand at \$5.60 per square foot (considerably more affordable than rates in large Texas metro areas such as Austin or Dallas) and that there has been little new construction of industrial space over the past decade.

A retail leakage analysis suggested that, given the existing spending power of its residents, the CTCOG Region could potentially support over 100 new retail businesses, particularly in categories such as grocery stores, restaurants, health and personal care stores, and miscellaneous retail stores. Real estate data indicates that there is persistent demand for retail space in the region, and that rents will remain modest compared to large Texas metro areas outside the region.



### Employment by Sector in 2021

NAICS & Description		CTCOG Counties		
		2021 Jobs	% of All Jobs	Payrolled Business Locations
90	Government	78,316	37.6%	462
62	Health Care and Social Assistance	23,303	11.2%	992
44	Retail Trade	20,297	9.8%	1,163
72	Accommodation and Food Services	15,468	7.4%	835
23	Construction	10,760	5.2%	784
81	Other Services (except Public Administration)	9,398	4.5%	751
31	Manufacturing	8,434	4.1%	290
56	Administrative and Support and Waste Mgmt.	6,835	3.3%	716
54	Professional, Scientific, and Technical Services	6,889	3.3%	473
48	Transportation and Warehousing	5,548	2.7%	221
42	Wholesale Trade	5,057	2.4%	327
52	Finance and Insurance	4,704	2.3%	466
61	Educational Services	3,570	1.7%	92
53	Real Estate and Rental and Leasing	2,778	1.3%	403
11	Agriculture, Forestry, Fishing and Hunting	1,886	0.9%	196
71	Arts, Entertainment, and Recreation	1,497	0.7%	102
51	Information	1,367	0.7%	101
55	Management of Companies and Enterprises	1,080	0.5%	26
22	Utilities	494	0.2%	37
21	Mining, Quarrying, and Oil and Gas Extraction	407	0.2%	27
99	Unclassified Industry	48	0.0%	54
<b>Totals</b>		<b>208,136</b>	<b>100%</b>	<b>1,696</b>

Source: Emsi. Payrolled business locations are for the year 2020.



## STRENGTHS

Population and job growth | Low cost of living | Central location  
Natural resources | Accessibility to higher education  
Quality of life | Large military presence | Diverse population  
Transportation routes and highway systems | Historic buildings  
Access to healthcare system | Friendliness of small communities  
Available land for industrial, residential and business growth  
Proximity to Austin and ease of commuting to Austin  
Strong local governments | Mature infrastructure  
Multiple parks and recreation opportunities  
Air service connectivity from GRK to national and international routes  
Growth in technology companies  
Tourist destinations and cultural diversity

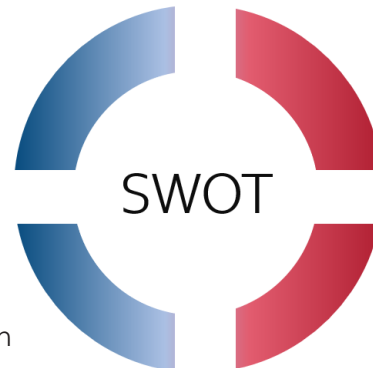
## OPPORTUNITIES

Business retention investments  
Attraction of skilled talent and remote workers  
Improved disaster planning, coordination, and resiliency  
Unified development codes | Smart traffic solutions  
Digital infrastructure readiness & rural broadband expansion  
Master planning for the airport | Alternative energy sources  
Pursue projects advancing environmental conservation and sustainability with the aim of protecting and enhancing quality of life  
Leverage available sites for industrial/commercial growth and attraction  
Leverage + retain a robust workforce pipeline, including existing trained workforce, local high school graduates, Fort Hood-affiliated personnel, and highly trained veteran workforce transitioning from the military  
Build out an innovation zone around the existing Research Park  
Improved housing options to accommodate residential growth  
Manufacturing sector opportunities related to Tesla Plant supply chain  
Regional marketing + tourism planning leveraging Central Texas as the "hub" of the major metros, messaging around Interstate I-14 improvements/expansion, cultural diversity, rural character, and historical assets  
Increased regional coordination via CTCOG

## What our stakeholders say about the region.

## WEAKNESSES

Limited rural high-speed broadband availability  
Limited water/wastewater and aging infrastructure  
Lack of high paying jobs | Lack of night life / entertainment  
Lack of coordinated messaging to recruit+promote businesses  
Educational disparities, especially in rural counties  
Lack of talent with education at Masters and PhD levels  
Limited affordable programs for youth | Loss of rural hospitals  
Lack of reliable/affordable public transport | Lack of event planning  
Limited tax base | Lack of grocery & other retail in small communities  
Lack of hangar space and marketing/branding of the regional airport, as well as poor air traveler capture vis-à-vis Austin  
Limited cross-community communication  
Low availability of affordable child care  
Lack of technology jobs, entrepreneur opportunities  
Inconsistent tax appraisal and GIS systems  
Lack of rail-equipped space for distribution facilities



## THREATS

Base Realignment and Closure (BRAC)  
Resource constraints (water, transit, agriculture)  
Limited public school funding | Restrictive federal policies  
Political disconnect between local and state governmental authorities  
Economic damage from COVID-19 | Energy crisis  
New constraints on local government imposed by the state legislature, including the redefinition of debt, limits on annexation, limits on ability to raise revenue  
Local budget constraints to maintain existing infrastructure and support improvements to infrastructure and transportation necessary to attract businesses  
Uncontrolled population growth combined with lack of regional land use planning



## About This Plan

The heart of this CEDS is the Action Plan Matrix, which represents the culmination of a broad strategic planning process that led to stakeholder consensus on goals, measurable objectives, and prioritized tasks. That process included the SWOT analysis, the development of an economic base report, a review of other relevant regional and local plans, a capacity assessment, stakeholder information surveys, an Opportunities & Challenges Workshop, and a Resiliency and Recovery Workshop, plus continuous guidance from the CEDS Steering Committee. The Action Plan Matrix is built around four key goal areas: resiliency and recovery planning; business growth and attraction; community vitality; and capacity building. Additionally, this CEDS contains a Post-Pandemic Toolkit for ongoing use by CTCOG and its partners.

The next page lays out the strategic direction that CTCOG and its partners plan to pursue from 2022-2026, along with performance measures that will be used to evaluate outcomes—that is, the impact of the CEDS' implementation on the region's economy. Following that, this document presents the Action Plan Matrix, organized around the four key goal areas and their respective objectives, and including

## Economic Recovery and Resilience

Economic resilience is treated as a distinct goal in this CEDS' Action Plan Matrix, though several strategies throughout the matrix will reinforce the region's resilience through broader economic vitality, connectivity, and capacity building. As reflected in this CEDS, it became clear that a regional organization, like CTCOG, best serves the region's resiliency needs by making cross-jurisdictional connections, keeping abreast of funding opportunities, planning around resiliency, and communicating/convening stakeholders on the topic.





## Strategic Framework

### **GOAL: Strengthen the region's ability to avoid, withstand, and respond to future shocks**

#### OBJECTIVES:

- Improve and formalize emergency operational and communication protocols within and across jurisdictions.
- Educate and prepare residents and businesses to better sustain themselves during disasters.
- Prepare and harden infrastructure needed for emergency communications, emergency services, and resilience.

### **GOAL: Accelerate regional business attraction and growth**

#### OBJECTIVES:

- Develop a strong regionally-based business marketing effort.
- Strengthen the conditions for growth of new and existing businesses.
- Cultivate, attract, and retain a talented workforce.

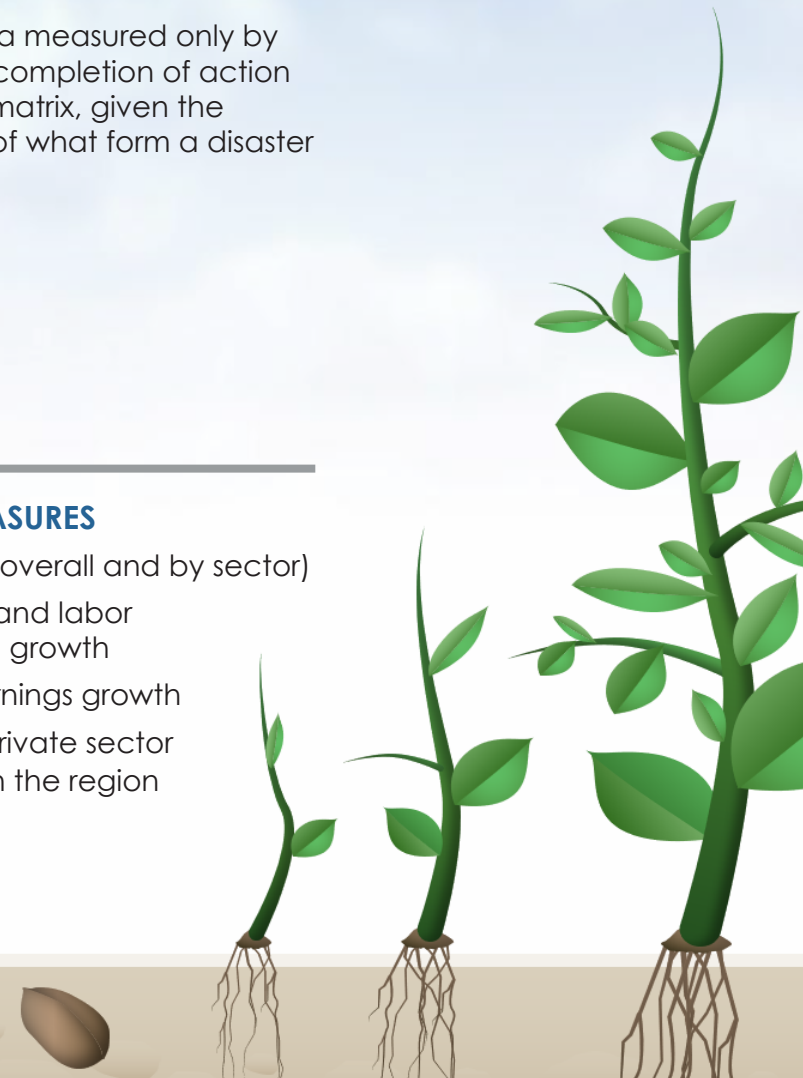
## Evaluation Framework

### **OUTCOME MEASURES**

- This goal area measured only by outputs, i.e. completion of action items in the matrix, given the uncertainty of what form a disaster might take.

### **OUTCOME MEASURES**

- Job growth (overall and by sector)
- Labor force and labor participation growth
- Regional earnings growth
- Amount of private sector investment in the region



## Strategic Framework

(continued)

## Evaluation Framework

(continued)

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### GOAL: Ensure the vitality of our communities and residents

#### OBJECTIVES:

- Proactively shape growth to ensure quality of place.
- Enhance the region's economic connectivity.
- Improve municipal systems that allow for fair taxation, stable revenues, and growth.

### OUTCOME MEASURES

- Expansion of broadband access
- Expansion of public transit offerings and multi-modal transportation options
- Alignment of housing stock to residents' needs
- Expansion of trails, greenspace access
- Reduction of retail leakage
- Roadway conditions
- Utilization of airport
- Property tax revenue growth

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### GOAL: Further position CTCOG as a resource for local jurisdictions

#### OBJECTIVE:

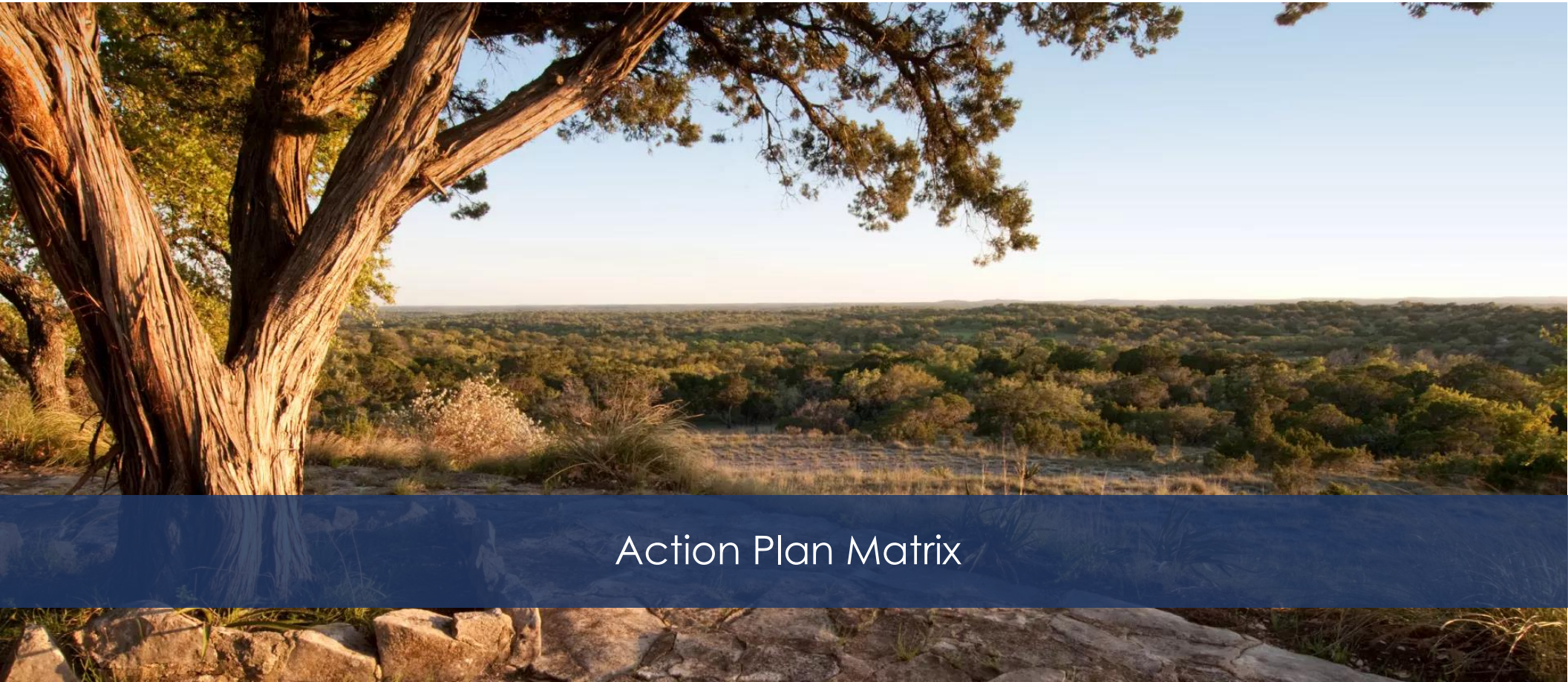
- Strengthen CTCOG offerings to complement municipalities' capabilities.

### OUTCOME MEASURES

- Grant funding secured by jurisdictions
- Jurisdiction participation in CTCOG programs and meetings







## Action Plan Matrix



**GOAL: Strengthen the region's ability to avoid, withstand, and respond to future shocks.**

**OBJECTIVE: Improve and formalize emergency operational and communication protocols within and across jurisdictions.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Prepare municipalities to function in remote/mobile formats during emergencies.	CTCOG technical advisement to jurisdictions	High	Near Term	\$	FEMA Emergency Management Performance Grant (EMPG)
Resume periodic emergency drills on various scenarios, including rehearsals for key generator hookups.	CTCOG to sponsor	High	Near Term	\$	N/A; staff time only
Evaluate scenarios for how people will access emergency medical services & supplies (including temperature-sensitive medicines) in consideration of rural areas' distance to hospitals.	CTCOG coordinate	High	Near Term	\$	FEMA EMPG
Develop and maintain jurisdiction-specific protocols for emergency communications and operations, including Severe Weather Emergency Response Plans. Protocols should include regional communication; consider municipal leadership overturn; address communication with utilities providers; address backup power use; and address use of radio/TV and local or county emergency preparedness web pages for residents without social media. Appoint a CTCOG staff member to serve as a point person for advising municipal leaders in times of crisis and for performing checks that protocols are annually updated.	CTCOG to coordinate and provide templates where appropriate and needed	High	Near Term	\$	FEMA EMPG
Host a "Small Town Summit" and coordinate basic emergency planning meetings on an ongoing basis.	CTCOG as lead; leverage FEMA NIMS materials	High	Mid Term	\$\$	N/A; staff time only
Create local volunteer task forces composed of residents willing to perform physical infrastructure checks and advise municipal leadership where roads, water distribution, and electric poles are out; seek participants that own drones.	Municipalities	Med	Mid Term	\$	FEMA EMPG
Educate jurisdictions on how to leverage the Defense Support of Civil Authorities program to secure generators, water, etc. from Fort Hood during crises.	CTCOG with DSCA program and National Guard	Med	Mid Term	\$	N/A; staff time only
Develop and centrally store templates for municipalities to send out emergency information (e.g. boil notices).	CTCOG	Low	Mid Term	\$	N/A; staff time only



**OBJECTIVE: Educate and prepare residents and businesses to better sustain themselves during disasters.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Assist businesses in developing continuity plans and accessing resources/programs for recovery and resilience. Leverage U.S. Chamber of Commerce Foundation's Disaster Preparedness and Recovery Guides.	CTCOG with SBDCs, local chambers, EDCs, and "SBA Regional Navigator" designee	High	Mid Term	\$	SBA programs
Develop and disseminate educational materials to households regarding preparations they can make to sustain themselves longer without utilities or transportation.	CTCOG prepare materials; municipalities disseminate	Med	Mid Term	\$	N/A; staff time only
Develop and disseminate informational materials to residents of mobile homes and other vulnerable structures to encourage repairs and other measures to make them more resistant to storm impacts, including information about financial resources that could offset the costs of such measures.	Municipalities, coordinated by CTCOG, in collaboration with Housing Divisions, Offices on Aging, Hill Country Community Action	Med	Mid Term	\$\$	N/A; staff time only
Consider processes for jurisdictions to further build relationships with residents to gain awareness of who has special needs and risks in the event of a crisis.	Municipalities with local real estate groups; Belton "R U OK?" model	Med	Long Term	\$\$	N/A; staff time only
Encourage businesses to explore profitable supply chain localization measures.	CTCOG with local chambers and advisement from TMAC (Texas' Manufacturing Extension Partnership)	Low	Long Term	\$	TMAC assistance pursuing individual grants for businesses to offset costs

**OBJECTIVE: Prepare and harden infrastructure needed for emergency communications, emergency services, & resilience.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Identify facilities that can house displaced/evacuated residents and serve as command-and-control centers. Prepare them with backup generators, caches of food/water, and transportation plans.	Rural communities	High	Near Term	\$	FEMA EMPG
Evaluate the cyber preparedness of CTCOG's 7-county 911 system.	CTCOG	High	Near Term	\$\$	FEMA EMPG
Procure and place generators (esp. diesel with 5-7 day capacity) at additional priority locations that will serve as warming/cooling centers.	CTCOG coordinate with municipalities and service providers	High	Mid Term	\$\$	FEMA EMPG
Adopt rural healthcare innovation models that provide for rural urgent care and health emergency response teams, leveraging Texas A&M Health.	Counties, Texas A&M Health (OnMed collaboration)	High	Mid Term	\$\$	Texas A&M Health program supported by Blue Cross and Blue Shield of Texas
Continue investing in and hardening broadband and cellular networks (e.g. improved battery backup and/or solar on cell towers/repeaters).	CTCOG coordinate with municipalities and service providers	High	Long Term	\$\$	Municipal funds
Invest in roadways needed for emergency services.	CTCOG advise communities on prioritization of maintenance investments	High	Long Term	\$\$\$	Killeen-Temple Metropolitan Organization (KTMPO)
Set up social media channels for individual jurisdictions to build following for improved outreach during emergencies.	Individual jurisdictions, with CTCOG technical assistance	Med	Near Term	\$	N/A; staff time only
Explore and develop capability for CTCOG to deliver alerts to all phones active in the region, building on the existing local CodeRED systems.	CTCOG	Med	Near Term	\$	N/A; staff time only
Educate jurisdictions on resources available for cyberattack prevention and mitigation.	CTCOG, leveraging Texas Municipal League and State resources	Med	Mid Term	\$	FEMA EMPG
Invest in backup power and communications; consider use of solar for redundancy.	CTCOG coordinate municipalities	Med	Mid Term	\$\$	FEMA Hazard Mitigation Grant Program & Pre-Disaster Mitigation Program





## GOAL: Accelerate regional business attraction and growth.

### OBJECTIVE: Develop a strong regionally-based business marketing effort.

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Develop a regional brand and marketing plan and unified business attraction messaging effort and showcasing Central Texas as the "hub" of the major Texas metros; diversity of communities and people, including lower-density rural living options; I-14 improvements/expansion; and historical heritage tourism.	CTCOG, partner with Convention and Visitors Bureaus and Chambers	High	Mid Term	\$\$	Municipal contributions
Hold Opportunity Zone investment forums to generate interest in specific development projects and connect investors with developers.	CTCOG with OZ host municipalities	High	Near Term	\$	N/A; staff time only
Develop a regionally-based tourism marketing effort promoting area destinations, downtowns, and outdoor assets.	CTCOG	Med	Long Term	\$\$	Municipal contributions; Texas Commission on the Arts' Cultural Districts Designation Program and associated grants
Integrate messaging about the Fort Hood talent base into business attraction marketing efforts.	CTCOG	Low	Mid Term	\$	Municipal contributions

**OBJECTIVE: Strengthen the conditions for growth of new and existing businesses.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Expand broadband, creating a Broadband Advisory Council to accelerate the audit/survey/buildout process across jurisdictions.*	CTCOG with Connected Nation and locally active ISPs	High	Near Term	\$\$\$	ARPA, Connected Nation, Rural Digital Opportunity Fund
Develop a regional water/sewer plan prioritizing investments needed for industry growth.	CTCOG with local water and sewer authorities	High	Near Term	\$\$	Texas Water Development Board; USDA Rural Development
Identify and prepare additional sites for industrial and distribution facilities; conduct site assessment and preliminary site design to aid in prioritization and site marketing.	EDCs as lead, with counties and municipalities	High	Mid Term	\$\$	CDBG for certain areas; potential future TxEDC programs replacing Texas Capital Fund Real Estate & Infrastructure Program
Build on the momentum of the Research Park to further cultivate high-tech industry clusters; study the potential to develop a broader "innovation zone" with the Park as its hub.*	CTCOG with Central Texas A&M	High	Mid Term	\$\$	Municipal contributions
Create a regional outreach effort to promote entrepreneurial opportunities to Fort Hood personnel transitioning into the civilian workforce, with a focus on defense contractor opportunities.	CTCOG, SBDCs, area incubators, PTACs	Med	Mid Term	\$	DOD Office of Local Defense Community Cooperation; SBA Office of Veterans Business Development
Collaborate with Tesla to connect local businesses to related supply chain opportunities.	CTCOG and Tesla with local chambers and advisement from TMAC (Texas' Manufacturing Extension Partnership)	Low	Near Term	\$	N/A; staff time only
Encourage greater utilization of Procurement Technical Assistance Centers to help local businesses capture greater federal procurement opportunities and Fort Hood economic impact; host education/awareness events in collaboration with PTACs.*	PTACs, Small Business Development Centers (SBDCs), CTCOG, Fort Hood	Low	Mid Term	\$	N/A; staff time only
Promote digital literacy in small businesses, leveraging existing training models.*	Chambers	Low	Mid Term	\$\$	N/A; staff time only

*\*These strategies additionally promote economic resilience through economic diversification and equipping businesses to more easily pivot and sustain themselves through a variety of economic shocks.*



**OBJECTIVE: Cultivate, attract, and retain a talented workforce.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Strengthen and continue partnerships between institutions of higher education and high/middle schools in the region to provide apprenticeships opportunities and increase participation of youth in skilled jobs and post-secondary degrees.	High schools and middle schools, higher education institutions, Workforce Solutions of Central Texas, Chambers, major employers	High	Mid Term	\$	Texas Workforce Commission programs (Skills Development Fund), employer contributions
Further leverage and scale mechanisms for facilitating entry of Fort Hood personnel into local private sector talent pool (e.g. the Heroes MAKE America and Hiring Our Heroes programs). Create a marketing campaign and associated "concierge service" to encourage Fort Hood personnel to remain local after service, supporting them in career exploration and accessing transitional services.	CTCOG coordinate with area higher education institutions, Workforce Solutions of Central Texas, Heart of Texas Defense Alliance, Chambers, Hiring our Heroes (U.S. Chamber Foundation), Heroes Make America (The Manufacturing Institute)	High	Long Term	\$\$	CTCOG and partner staff time with potential employer contributions / sponsorships



**GOAL: Ensure the vitality of our communities and residents.**

**OBJECTIVE: Proactively shape growth to ensure quality of place.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Study the region's housing stock and develop strategies to ensure adequate housing product for current and future residents. Product should outline tactics for municipalities to help induce both new construction and improvements to substandard homes.	CTCOG and jurisdictions, partner with realtor associations/boards and home builder associations	High	Near Term	\$\$	Community Development Block Grant
Create a Regional Trails Plan that enhances multi-modal transportation options and ensures robust access to outdoor amenities and water features.	CTCOG and KTMPO, jurisdictions, Texas Parks and Wildlife, US Army Corp of Engineers	High	Mid Term	\$\$	KTMPO; Texas Parks & Wildlife Department (e.g. Recreational Trails Grants)
Encourage a diversity of retail, services, and entertainment establishments, particularly in downtowns; conduct retail leakage studies; host a small-town "Texas Downtowns" regional gathering to discuss strategies to increase foot traffic.	CTCOG, local EDCs	High	Mid Term	\$\$	N/A; staff time only
Develop a regional land use plan and master plans for cities, setting the foundation for decisions affecting where growth and development are channeled.	CTCOG and jurisdictions	Med	Near Term	\$\$	Texas Dept. of Agriculture Programs (TCF; DRP; Planning & Capacity Building Fund)
Assist jurisdictions with updating ordinances and policies in anticipation of subdivision development interest; with attention to policies requiring developer contribution to utilities expansion.	CTCOG and jurisdictions	Low	Mid Term	\$\$	N/A; staff time only



**OBJECTIVE: Enhance the region's economic connectivity.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Expand broadband, creating a Broadband Advisory Council to accelerate the audit/survey/buildout process across jurisdictions.	CTCOG with Connected Nation and locally active ISPs	High	Near Term	\$\$\$	ARPA, Connected Nation, Rural Digital Opportunity Fund
Expand public transit offerings to provide reliable, affordable public transportation options for connecting rural residents with employment centers.	CTCOG, Hill Country Transit District, TXDOT, MPOs	High	Near Term	\$\$	Federal formula funds
Improve the conditions of roadways, with particular attention to increased use of county roads.	CTCOG discussions with Killeen-Temple MPO and other MPOs	Med	Near Term	\$\$\$	State Highway Fund, CDBG
Develop an airport master plan addressing airport marketing/branding, increasing competitiveness vis-à-vis Austin, and needed upgrades such as additional hangar space.	CTCOG and airport authority	Med	Mid Term	\$\$	FAA Airport Improvement Program

**OBJECTIVE: Improve municipal systems that allow for fair taxation, stable revenues, and growth.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Accelerate appraisal efforts, particularly in high-growth communities.	Tax Appraisal Districts with CTCOG coordinating	High	Near	\$\$	N/A; staff time only
Harmonize all communities' GIS systems and parcel address methodologies.	Municipalities and Tax Appraisal Districts with CTCOG technical assistance	Low	Mid Term	\$\$	N/A; staff time only



## GOAL: Further position CTCOG as a resource for local jurisdictions.

### OBJECTIVE: Strengthen CTCOG offerings to complement municipalities' capabilities.

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Build additional capacity to assist jurisdictions with grant identification/writing/administration.	CTCOG	High	Near Term	\$\$	N/A; staff time only
Hold a periodic introductory class for newly elected officials to familiarize them with CTCOG capabilities, and to provide them with a "municipal imperatives" cheat sheet to aid in their prioritization.	CTCOG	Med	Near Term	\$	
Create marketing materials summarizing CTCOG services, assistance, and resources available to municipalities.	CTCOG	Med	Near Term	\$	
Conduct remote/hybrid meetings to increase accessibility for rural communities.	CTCOG	Med	Near Term	\$	
Provide technical support as-needed to communities on subjects of planning, transportation, legal, etc.	CTCOG	Med	Mid Term	\$\$	
Perform a "circuit rider" function, checking in with smaller/rural communities in particular to ensure functioning relationships with Tax Appraisal Districts, 911 system effectiveness, etc.	CTCOG	Low	Near Term	\$	



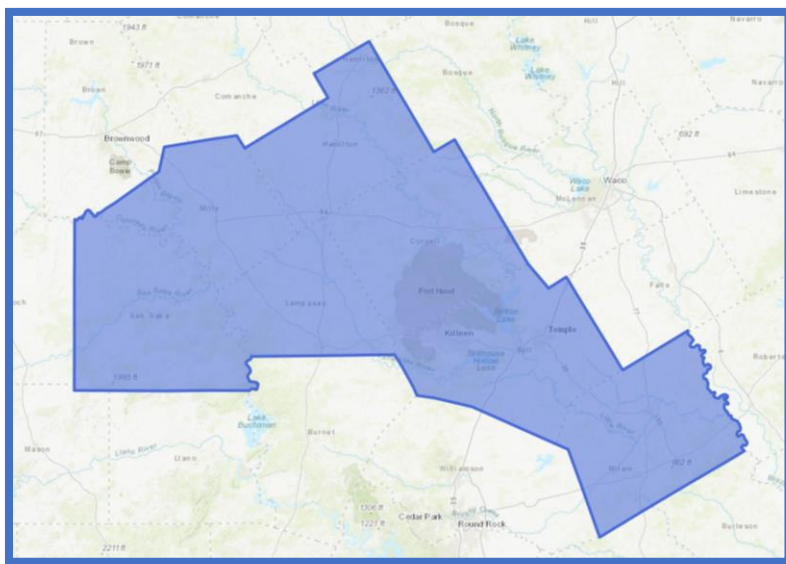
# Appendix A: Economic Profile

## Introduction

The following market overview presents information on the current economic conditions of the Central Texas Council of Governments (CTCOG) Region, in terms of demographic, industrial, and real estate trends. Insights from this analysis provided a foundation for strategic planning purposes in later phases of the project. The data displayed throughout the market profile was collected from numerous sources that collectively depict current market conditions, including the American Community Survey estimates from the US Census Bureau, Esri, Emsi, and CoStar.

## Market Area

The following sections on demographic, economic, and industry trends incorporate data covering two geographies: (1) The CTCOG Region as a whole comprised of Bell, Coryell, Hamilton, Lampasas, Milam, Mills, and San Saba Counties; and (2) the State of Texas. The maps below depict these geographies.



*"CTCOG Region" – Bell, Coryell, Hamilton, Lampasas, Milam, Mills, and San Saba Counties*



*Texas, with CTCOG Region shown in blue*

## Demographics

### Overview

The table shown at right is a comparison of demographic trends for the CTCOG Region and the State of Texas.

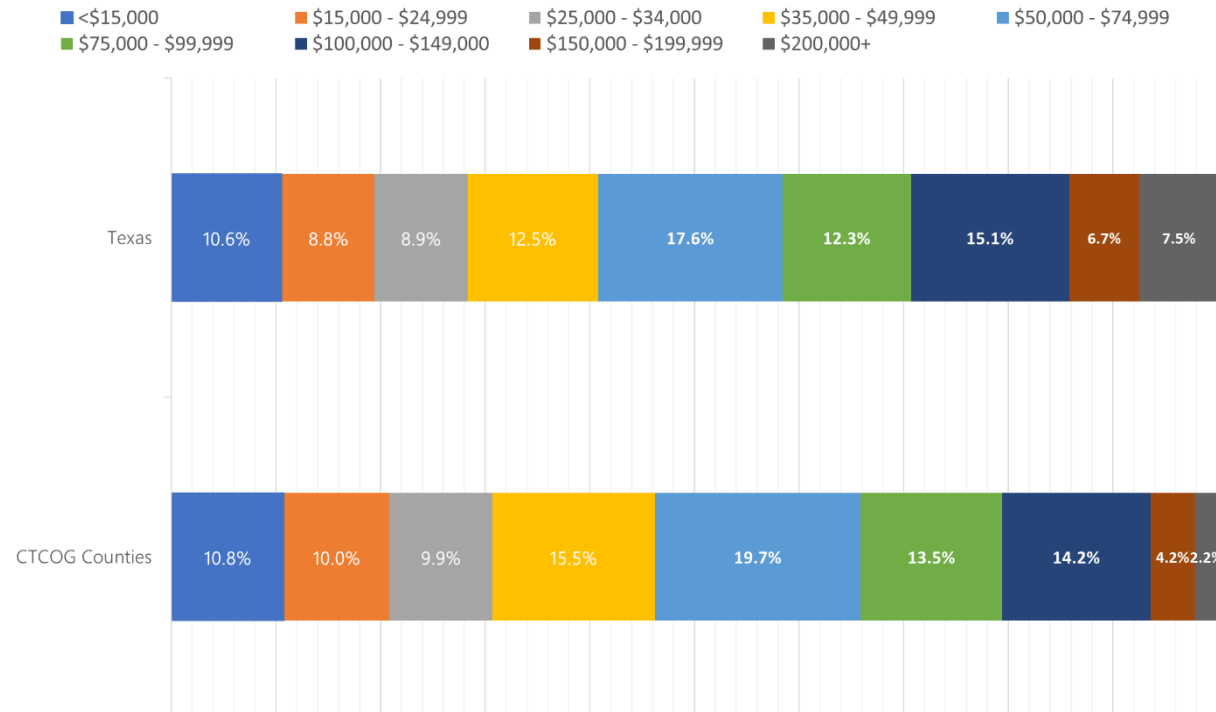
- Both geographies have realized a significant growth in population over the last ten years. Texas population growth slightly outpaced growth in the CTCOG Region.
- The number of households has grown in both geographies at a similar pace.
- Average household size in the CTCOG Region has remained largely unchanged, where it has grown slightly in Texas.
- The CTCOG Region's median age is 33, about two years below the State median age, but the CTCOG Region is aging faster than the State.

Demographic Fundamentals				
Population				
	2010	2020	Change	% Change
CTCOG Counties	449,641	527,639	77,998	17.3%
Texas	25,145,561	29,806,340	4,660,779	18.5%
Households				
	2010	2020	Change	% Change
CTCOG Counties	161,201	189,022	27,821	17.3%
Texas	8,922,933	10,521,548	1,598,615	17.9%
Average Household Size				
	2010	2020	Change	% Change
CTCOG Counties	2.66	2.67	0.01	0.4%
Texas	2.75	2.78	0.03	1.1%
Median Age				
	2010	2020	Change	% Change
CTCOG Counties	30.9	33.0	2.1	6.8%
Texas	33.6	35.1	1.5	4.5%

Source: ESRI

### Household Income Distribution

The figure to the right compares the household income distribution of the two geographies. Compared to the State, the CTCOG Region has a higher percentage of households earning less than \$75,000 annually, at 65.9% for the Region and 58.4% for the State. The Region has a lower percentage of households earning more than \$150,000 annually at 6.4%, compared to 14.2% at the State level.



Source: ESRI

### Projected Income Growth

The five-year projected growth in median household income is displayed in the table to the right. Although income is expected to grow in both geographies, it is expected to grow at a lesser rate in the CTCOG Region.

Projected Income Growth				
	Median Household Income			
	2020	2025	Change	Growth %
CTCOG Counties	\$53,449	\$55,951	\$2,502	4.7%
Texas	\$60,820	\$65,282	\$4,462	7.3%

Source: ESRI

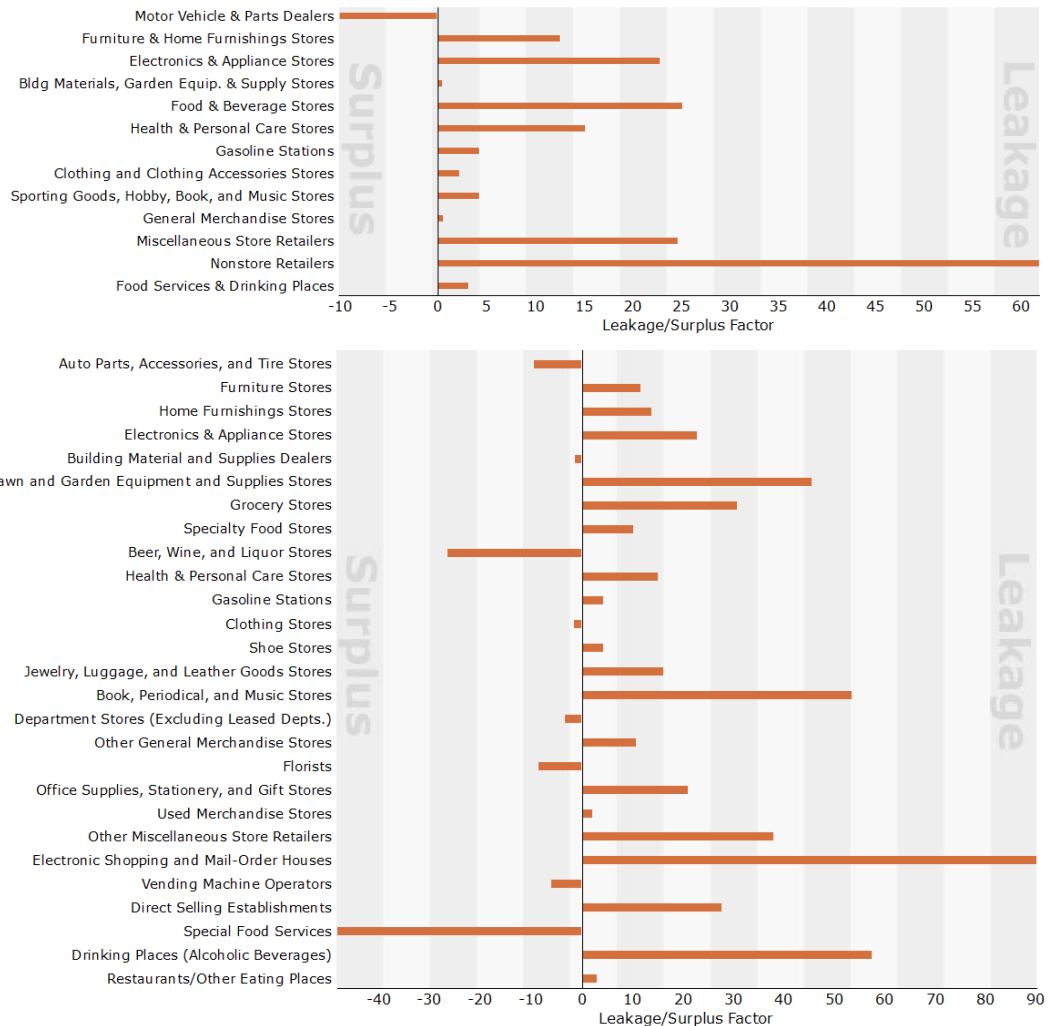


## Retail Market Analysis

A retail gap analysis identifies specific retail categories where residents are spending more on a particular good than the total amount of sales of that good that are occurring within a specified Region. In other words, retail 'leakages' exist where residents are meeting their needs for these products and services by traveling outside the Region to make their purchases. By creating new businesses or expanding existing businesses in retail categories with a sales leakage, a portion of these leakages and economic activity can be recaptured in the Region.

Due to the diffuse nature of the CTCOG Region, many of the goods and services will be bought outside the Region and thus create retail leakages. The level of retail leakages is used to calculate the number of new businesses, and square footage, that the Region could support if 25% of the leakage is recaptured.

2017 Leakage/Surplus Factor by Industry Subsector



The table to the right displays the retail marketplace profile for the CTCOG Region. Retail categories in bold show a retail leakage, where local demand exceeds local supply.

The following retail categories exhibit retail leakages:

- Other Motor Vehicle Dealers
- Furniture Stores
- Home Furnishings Stores
- Lawn & Garden Equip & Supply Stores
- Grocery Stores
- Specialty Food Stores
- Health & Personal Care Stores
- Gasoline Stations
- Shoe Stores
- Jewelry, Luggage & Leather Goods Stores
- Sporting Goods/Hobby/Musical Instr. Stores
- Book, Periodical & Music Stores
- Other General Merchandise Stores
- Office Supplies, Stationery & Gift Stores
- Used Merchandise Stores
- Other Miscellaneous Store Retailers
- Drinking Places - Alcoholic Beverages
- Restaurants/Other Eating Places

Sales Surplus & Leakage, CTCOG Region					
NAICS	2017 Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	# of Businesses
441	Motor Vehicle & Parts Dealers	\$1,182,762,175	\$1,450,531,122	(\$267,768,947)	322
4411	Automobile Dealers	\$953,742,203	\$1,241,168,885	(\$287,426,682)	164
<b>4412</b>	<b>Other Motor Vehicle Dealers</b>	<b>\$127,261,189</b>	<b>\$86,219,820</b>	<b>\$41,041,369</b>	<b>32</b>
4413	Auto Parts, Accessories & Tire Stores	\$101,758,783	\$123,142,417	(\$21,383,634)	126
<b>442</b>	<b>Furniture &amp; Home Furnishings Stores</b>	<b>\$180,746,900</b>	<b>\$140,315,107</b>	<b>\$40,431,793</b>	<b>98</b>
<b>4421</b>	<b>Furniture Stores</b>	<b>\$106,284,823</b>	<b>\$84,046,584</b>	<b>\$22,238,239</b>	<b>54</b>
<b>4422</b>	<b>Home Furnishings Stores</b>	<b>\$74,462,077</b>	<b>\$56,268,523</b>	<b>\$18,193,554</b>	<b>44</b>
<b>443</b>	<b>Electronics &amp; Appliance Stores</b>	<b>\$189,038,691</b>	<b>\$118,533,727</b>	<b>\$70,504,964</b>	<b>68</b>
<b>444</b>	<b>Bldg Materials, Garden Equip. &amp; Supply Stores</b>	<b>\$346,296,844</b>	<b>\$343,120,501</b>	<b>\$3,176,343</b>	<b>140</b>
4441	Bldg Material & Supplies Dealers	\$326,189,238	\$335,651,898	(\$9,462,660)	118
<b>4442</b>	<b>Lawn &amp; Garden Equip &amp; Supply Stores</b>	<b>\$20,107,606</b>	<b>\$7,468,603</b>	<b>\$12,639,003</b>	<b>22</b>
<b>445</b>	<b>Food &amp; Beverage Stores</b>	<b>\$972,045,509</b>	<b>\$580,471,012</b>	<b>\$391,574,497</b>	<b>280</b>
<b>4451</b>	<b>Grocery Stores</b>	<b>\$883,383,995</b>	<b>\$465,081,472</b>	<b>\$418,302,523</b>	<b>186</b>
<b>4452</b>	<b>Specialty Food Stores</b>	<b>\$41,312,137</b>	<b>\$33,576,183</b>	<b>\$7,735,954</b>	<b>52</b>
4453	Beer, Wine & Liquor Stores	\$47,349,377	\$81,813,357	(\$34,463,980)	42
<b>446</b>	<b>Health &amp; Personal Care Stores</b>	<b>\$309,690,507</b>	<b>\$227,949,775</b>	<b>\$81,740,732</b>	<b>140</b>
<b>447</b>	<b>Gasoline Stations</b>	<b>\$546,957,486</b>	<b>\$501,494,767</b>	<b>\$45,462,719</b>	<b>183</b>
<b>448</b>	<b>Clothing &amp; Clothing Accessories Stores</b>	<b>\$234,097,030</b>	<b>\$223,544,379</b>	<b>\$10,552,651</b>	<b>215</b>
4481	Clothing Stores	\$156,503,437	\$161,167,559	(\$4,664,122)	140
<b>4482</b>	<b>Shoe Stores</b>	<b>\$33,093,441</b>	<b>\$30,356,317</b>	<b>\$2,737,124</b>	<b>26</b>
<b>4483</b>	<b>Jewelry, Luggage &amp; Leather Goods Stores</b>	<b>\$44,500,152</b>	<b>\$32,020,503</b>	<b>\$12,479,649</b>	<b>49</b>
<b>451</b>	<b>Sporting Goods, Hobby, Book &amp; Music Stores</b>	<b>\$179,809,034</b>	<b>\$165,028,381</b>	<b>\$14,780,653</b>	<b>136</b>
<b>4511</b>	<b>Sporting Goods/Hobby/Musical Instr Stores</b>	<b>\$160,178,814</b>	<b>\$159,090,294</b>	<b>\$1,088,520</b>	<b>118</b>
<b>4512</b>	<b>Book, Periodical &amp; Music Stores</b>	<b>\$19,630,220</b>	<b>\$5,938,087</b>	<b>\$13,692,133</b>	<b>18</b>
<b>452</b>	<b>General Merchandise Stores</b>	<b>\$923,152,230</b>	<b>\$912,038,519</b>	<b>\$11,113,711</b>	<b>144</b>
4521	Department Stores Excluding Leased Depts.	\$636,455,219	\$681,289,987	(\$44,834,768)	52
<b>4529</b>	<b>Other General Merchandise Stores</b>	<b>\$286,697,011</b>	<b>\$230,748,532</b>	<b>\$55,948,479</b>	<b>92</b>
<b>453</b>	<b>Miscellaneous Store Retailers</b>	<b>\$212,952,470</b>	<b>\$128,473,813</b>	<b>\$84,478,657</b>	<b>290</b>
4531	Florists	\$8,640,764	\$10,288,545	(\$1,647,781)	38
<b>4532</b>	<b>Office Supplies, Stationery &amp; Gift Stores</b>	<b>\$44,234,821</b>	<b>\$28,827,267</b>	<b>\$15,407,554</b>	<b>72</b>
<b>4533</b>	<b>Used Merchandise Stores</b>	<b>\$34,864,278</b>	<b>\$33,390,236</b>	<b>\$1,474,042</b>	<b>74</b>
<b>4539</b>	<b>Other Miscellaneous Store Retailers</b>	<b>\$125,212,607</b>	<b>\$55,967,765</b>	<b>\$69,244,842</b>	<b>106</b>
<b>722</b>	<b>Food Services &amp; Drinking Places</b>	<b>\$581,338,577</b>	<b>\$545,691,556</b>	<b>\$35,647,021</b>	<b>842</b>
7223	Special Food Services	\$6,989,689	\$20,177,025	(\$13,187,336)	20
<b>7224</b>	<b>Drinking Places - Alcoholic Beverages</b>	<b>\$20,698,655</b>	<b>\$5,560,029</b>	<b>\$15,138,626</b>	<b>37</b>
<b>7225</b>	<b>Restaurants/Other Eating Places</b>	<b>\$553,650,233</b>	<b>\$519,954,502</b>	<b>\$33,695,731</b>	<b>785</b>

Source: ESRI

The table below displays the full extent of additional supportable retail in the Region, if we assume a 25% recapture of existing retail leakage. At this recapture rate, the CTCOG Region could potentially support over 100 new businesses across the displayed categories. **Grocery Stores, Other Miscellaneous Store Retailers, Restaurants/Other Eating Places, and Health & Personal Care Stores** could each support over 10 new establishments.

Retail Gap Analysis CTCOG Counties							
NAICS	2017 Industry Group	Retail Gap	25% Recapture	Average Sales per Business	Supportable Business Count	Average Sales per SF	Supportable SF
4412	Other Motor Vehicle Dealers	\$41,041,369	\$10,260,342	\$3,445,943	2.98	\$500	20,521
4421	Furniture Stores	\$22,238,239	\$5,559,560	\$2,022,826	2.75	\$500	11,119
4422	Home Furnishings Stores	\$18,193,554	\$4,548,389	\$1,529,926	2.97	\$500	9,097
4442	Lawn & Garden Equip & Supply Stores	\$12,639,003	\$3,159,751	\$726,155	4.35	\$400	7,899
4451	Grocery Stores	\$418,302,523	\$104,575,631	\$5,009,801	20.87	\$300	348,585
4452	Specialty Food Stores	\$7,735,954	\$1,933,989	\$797,015	2.43	\$500	3,868
446	Health & Personal Care Stores	\$81,740,732	\$20,435,183	\$2,006,669	10.18	\$350	58,386
447	Gasoline Stations	\$45,462,719	\$11,365,680	\$4,161,241	2.73	\$350	32,473
4482	Shoe Stores	\$2,737,124	\$684,281	\$1,219,283	0.56	\$350	1,955
4483	Jewelry, Luggage & Leather Goods Stores	\$12,479,649	\$3,119,912	\$1,096,304	2.85	\$500	6,240
4511	Sporting Goods/Hobby/Musical Instr Stores	\$1,088,520	\$272,130	\$1,656,624	0.16	\$350	778
4512	Book, Periodical & Music Stores	\$13,692,133	\$3,423,033	\$1,081,614	3.16	\$350	9,780
4529	Other General Merchandise Stores	\$55,948,479	\$13,987,120	\$3,499,813	4.00	\$350	39,963
4532	Office Supplies, Stationery & Gift Stores	\$15,407,554	\$3,851,889	\$741,279	5.20	\$350	11,005
4533	Used Merchandise Stores	\$1,474,042	\$368,511	\$474,333	0.78	\$350	1,053
4539	Other Miscellaneous Store Retailers	\$69,244,842	\$17,311,211	\$927,208	18.67	\$350	49,461
7224	Drinking Places - Alcoholic Beverages	\$15,138,626	\$3,784,657	\$497,821	7.60	\$300	12,616
7225	Restaurants/Other Eating Places	\$33,695,731	\$8,423,933	\$757,049	11.13	\$300	28,080
<b>Total</b>		<b>\$868,260,793</b>	<b>\$217,065,198</b>		<b>103.37</b>		<b>652,879</b>

Source: ESRI. MRB Group



## Industry Analysis

### Industry Composition

The following figure shows the industry sector composition of the CTCOG Region in 2021. The largest industry sector in the Region is **Government**, accounting for 78,316 jobs, or approximately 38% of total jobs. **Health Care and Social Assistance** is the second largest industry sector by employment, with 23,303 employees. **Retail Trade** is third largest, employing 20,297.

Employment by Sector in 2021							
NAICS & Description		CTCOG Counties			Texas		
		2021 Jobs	% of All Jobs	Payrolled Business Locations	2021 Jobs	% of All Jobs	Payrolled Business Locations
90	Government	78,316	37.6%	462	2,176,530	21.3%	16,926
62	Health Care and Social Assistance	23,303	11.2%	992	1,622,492	15.9%	87,735
44	Retail Trade	20,297	9.8%	1,163	1,382,229	13.5%	79,163
72	Accommodation and Food Services	15,468	7.4%	835	1,223,504	12.0%	57,302
23	Construction	10,760	5.2%	784	1,029,101	10.1%	53,869
81	Other Services (except Public Administration)	9,398	4.5%	751	795,254	7.8%	57,323
31	Manufacturing	8,434	4.1%	290	931,853	9.1%	25,856
56	Administrative and Support and Waste Mgmt.	6,835	3.3%	716	929,077	9.1%	39,845
54	Professional, Scientific, and Technical Services	6,889	3.3%	473	984,427	9.6%	98,986
48	Transportation and Warehousing	5,548	2.7%	221	618,758	6.1%	22,269
42	Wholesale Trade	5,057	2.4%	327	629,601	6.2%	47,325
52	Finance and Insurance	4,704	2.3%	466	638,064	6.2%	42,684
61	Educational Services	3,570	1.7%	92	247,746	2.4%	8,457
53	Real Estate and Rental and Leasing	2,778	1.3%	403	284,565	2.8%	34,633
11	Agriculture, Forestry, Fishing and Hunting	1,886	0.9%	196	111,512	1.1%	10,346
71	Arts, Entertainment, and Recreation	1,497	0.7%	102	175,298	1.7%	8,522
51	Information	1,367	0.7%	101	217,686	2.1%	11,086
55	Management of Companies and Enterprises	1,080	0.5%	26	152,234	1.5%	3,681
22	Utilities	494	0.2%	37	54,759	0.5%	2,048
21	Mining, Quarrying, and Oil and Gas Extraction	407	0.2%	27	236,332	2.3%	9,510
99	Unclassified Industry	48	0.0%	54	9,766	0.1%	6,724
<b>Totals</b>		<b>208,136</b>	<b>100.0%</b>	<b>1,696</b>	<b>10,219,675</b>	<b>100.0%</b>	<b>724,289</b>

Source: Emsi. Payrolled business locations are for the year 2020.

## Employment Trends

Over the last ten years, the CTCOG Region has had a net gain in jobs of 2.4%, or 4,947 jobs, a much smaller growth rate as compared to the State. In terms of job count, employment growth was primarily driven by **Healthcare & Social Assistance; Retail Trade; Accommodation & Food Services; Construction;** and **Education** industries. These industries have grown throughout the State. Conversely, while the **Government** industry sector has grown 6.6% in Texas, the CTCOG region has lost 13% or 11,796 of its jobs in this industry sector over the last ten years. Notably, the **Management of Companies and Enterprises** has grown 896% in the CTCOG Region, adding 971 jobs from a low base.

Employment Change by Sector 2011 - 2021									
NAICS & Description		CTCOG Counties				Texas			
		2011 Jobs	2021 Jobs	# Change	% Change	2011 Jobs	2021 Jobs	# Change	% Change
44	Retail Trade	17,460	20,297	2,837	16.2%	1,237,791	1,382,229	144,438	11.7%
62	Health Care and Social Assistance	20,547	23,303	2,757	13.4%	1,285,539	1,622,492	336,954	26.2%
72	Accommodation and Food Services	12,947	15,468	2,521	19.5%	960,441	1,223,504	263,063	27.4%
23	Construction	8,409	10,760	2,351	28.0%	758,891	1,029,101	270,210	35.6%
61	Educational Services	2,281	3,570	1,289	56.5%	186,993	247,746	60,752	32.5%
55	Management of Companies and Enterprises	108	1,080	971	896.0%	83,461	152,234	68,773	82.4%
56	Administrative and Support and Waste Management and Remediation Services	5,882	6,835	952	16.2%	766,929	929,077	162,148	21.1%
54	Professional, Scientific, and Technical Services	6,091	6,889	798	13.1%	680,818	984,427	303,609	44.6%
53	Real Estate and Rental and Leasing	2,115	2,778	663	31.3%	215,116	284,565	69,449	32.3%
42	Wholesale Trade	4,459	5,057	598	13.4%	533,556	629,601	96,045	18.0%
81	Other Services (except Public Administration)	8,853	9,398	545	6.2%	699,909	795,254	95,345	13.6%
31	Manufacturing	7,903	8,434	531	6.7%	858,074	931,853	73,779	8.6%
71	Arts, Entertainment, and Recreation	1,011	1,497	487	48.1%	136,573	175,298	38,725	28.4%
48	Transportation and Warehousing	5,178	5,548	370	7.1%	426,540	618,758	192,218	45.1%
11	Agriculture, Forestry, Fishing and Hunting	1,728	1,886	158	9.1%	110,270	111,512	1,242	1.1%
52	Finance and Insurance	4,642	4,704	62	1.3%	510,101	638,064	127,963	25.1%
21	Mining, Quarrying, and Oil and Gas Extraction	364	407	44	12.0%	241,850	236,332	(5,518)	(2.3%)
99	Unclassified Industry	56	48	(9)	(15.6%)	3,301	9,766	6,465	195.8%
22	Utilities	525	494	(31)	(5.9%)	48,996	54,759	5,763	11.8%
51	Information	2,518	1,367	(1,151)	(45.7%)	204,212	217,686	13,473	6.6%
90	Government	90,112	78,316	(11,796)	(13.1%)	2,041,354	2,176,530	135,176	6.6%
<b>Totals</b>		<b>203,189</b>	<b>208,136</b>	<b>4,947</b>	<b>2.4%</b>	<b>11,990,716</b>	<b>14,450,786</b>	<b>2,460,071</b>	<b>20.5%</b>

Source: Emsi

## Projected Employment Trends

Over the next ten years, the County's largest sector, Government, is projected to lose roughly another 200 jobs. Other than Government and the Finance & Insurance industry, all other industries are projected to grow over the next ten years. In terms job count, Healthcare & Social Assistance and Accommodation & Food Services are project to add the most jobs, at 2,865 and 2,405 jobs respectively.

Projected Employment Growth by Sector through 2031									
NAICS & Description		CTCOG Counties				Texas			
		2021 Jobs	2031 Jobs	# Change	% Change	2021 Jobs	2031 Jobs	# Change	% Change
62	Health Care and Social Assistance	23,303	26,277	2,865	12.2%	1,622,492	1,892,641	270,149	16.7%
72	Accommodation and Food Services	10,760	18,241	2,405	15.2%	1,029,101	1,410,066	186,563	15.2%
61	Educational Services	1,497	4,959	1,379	38.5%	175,298	299,561	51,816	20.9%
44	Retail Trade	15,468	21,499	1,290	6.4%	1,223,504	1,457,198	74,970	5.4%
56	Administrative and Support and Waste Management and Remediation Services	6,889	7,856	1,070	15.8%	984,427	1,008,877	79,801	8.6%
23	Construction	3,570	11,784	1,054	9.8%	247,746	1,120,005	90,904	8.8%
54	Professional, Scientific, and Technical Services	2,778	7,769	1,015	15.0%	284,565	1,159,792	175,365	17.8%
81	Other Services (except Public Administration)	1,080	10,184	633	6.6%	152,234	860,337	65,083	8.2%
71	Arts, Entertainment, and Recreation	4,704	2,050	478	30.4%	638,064	201,708	26,410	15.1%
48	Transportation and Warehousing	5,057	5,968	384	6.9%	629,601	680,192	61,434	9.9%
55	Management of Companies and Enterprises	48	1,434	341	31.2%	9,766	180,762	28,528	18.7%
42	Wholesale Trade	9,398	5,437	298	5.8%	795,254	650,475	20,875	3.3%
31	Manufacturing	6,835	8,771	198	2.3%	929,077	946,142	14,289	1.5%
53	Real Estate and Rental and Leasing	5,548	2,947	174	6.3%	618,758	300,945	16,380	5.8%
51	Information	407	1,566	149	10.5%	236,332	225,406	7,720	3.5%
21	Mining, Quarrying, and Oil and Gas Extraction	1,367	496	89	21.8%	217,686	277,412	41,080	17.4%
11	Agriculture, Forestry, Fishing and Hunting	1,886	1,991	86	4.5%	111,512	112,206	694	0.6%
22	Utilities	494	547	25	4.8%	54,759	56,838	2,080	3.8%
99	Unclassified Industry	78,316	71	4	5.4%	2,176,530	9,408	(358)	(3.7%)
52	Finance and Insurance	8,434	4,657	(210)	(4.3%)	931,853	691,511	53,447	8.4%
90	Government	20,297	78,119	(214)	(0.3%)	1,382,229	2,307,775	131,245	6.0%
<b>Totals</b>		<b>208,136</b>	<b>222,622</b>	<b>13,511</b>	<b>7.0%</b>	<b>14,450,786</b>	<b>15,849,260</b>	<b>1,398,473</b>	<b>9.7%</b>

Source: Emsi



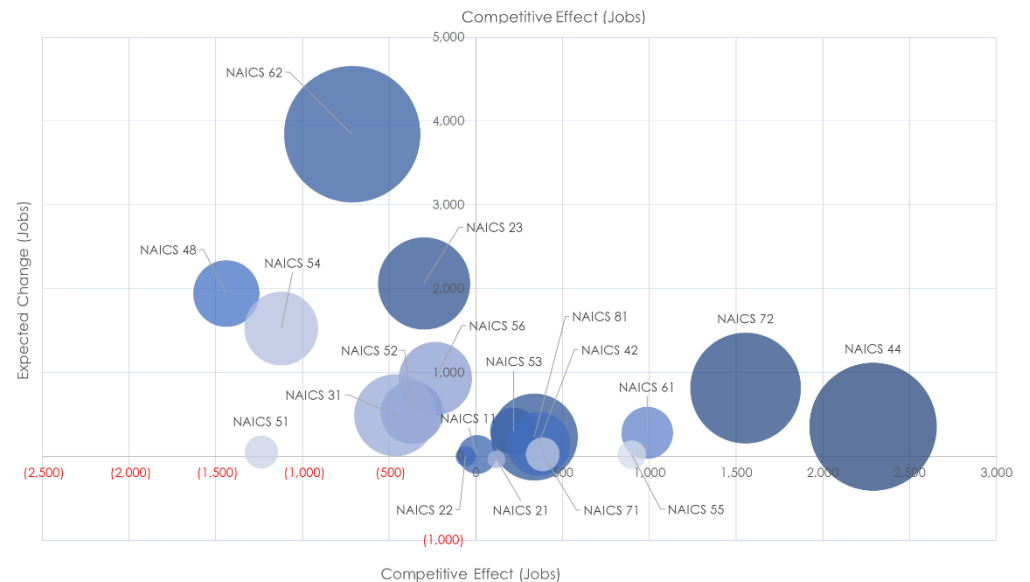
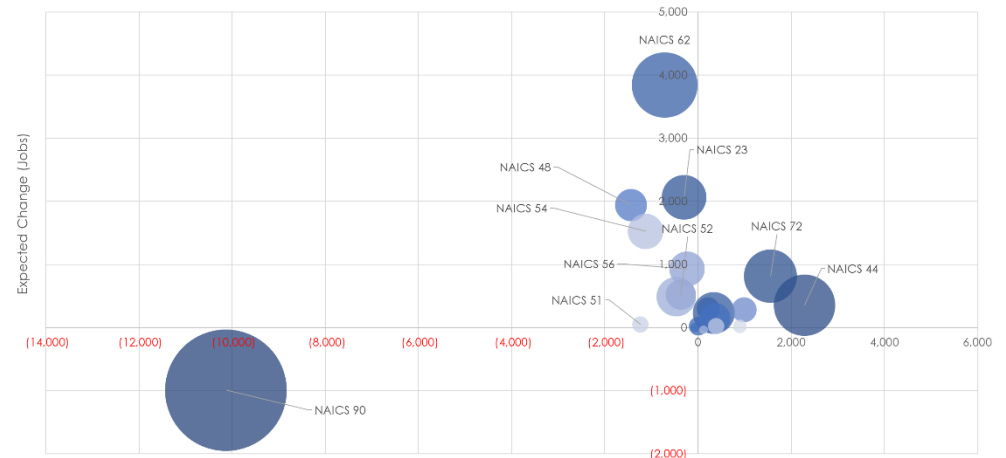
## Shift Share

Shift share analysis provides insights on industry-specific employment growth by distinguishing influences of local competitive advantages from national employment trends. These insights can explain why employment has grown or declined in a given local industry over a specified period of time.

There are four components of shift share analysis:

1. **Industrial Mix Effect** is the share of regional industry trends that can be attributed to nationwide trends in the specified industry.
2. **National Growth Effect** is the share of regional industry growth that is explained by the growth in the national economy as a whole.
3. **Expected Change** is the sum of the industrial mix and national growth effects. Both the national-level industry trends and the performance of the national economy will have a measurable impact on regional industry growth. This figure reflects industry-specific and economic trends at the national level.
4. **Competitive Effect** indicates how much of the job change within the CTCOG Region is the result of some unique competitive advantage of the Region. The competitive effect measures the job change that occurs within a regional industry that cannot be explained by broader trends (i.e. the National Growth Effect and the Industrial Mix Effect).

Shift Share Analysis CTCOG



The table to the right displays the shift share analysis for CTCOG Region from 2010-2020. Assuming Central Texas mirrored national industry and economic growth trends over the same time period, the Region would have added approximately 13,875 jobs. Instead, the Region added only 4,947 jobs, indicating a negative overall competitive effect. The 8,929 difference in expected versus actual job count could be attributed to unique regional characteristics.

However, the CTCOG Region clearly has strong competitive advantages relative to other parts of the nation in **Retail Trade; Accommodation and Food Services; Educational Services; and Management of Companies and Enterprises.**

Shift Share Analysis, CTCOG Counties					
NAICS	Industry	Ind. Mix Effect	Nat'l Growth Effect	Expected Change	Competitive Effect
90	Government	(8,283)	8,792	509	(12,305)
62	Health Care and Social Assistance	2,350	2,005	4,355	(1,598)
44	Retail Trade	(1,574)	1,704	130	2,707
72	Accommodation and Food Services	(756)	1,263	507	2,014
23	Construction	1,443	820	2,264	87
81	Other Services (except Public Administration)	(718)	864	146	399
31	Manufacturing	(364)	771	407	124
54	Professional, Scientific, and Technical Services	884	594	1,479	(680)
56	Administrative and Support and Waste Management and Remediation Services	142	574	716	237
48	Transportation and Warehousing	1,521	505	2,026	(1,656)
42	Wholesale Trade	(333)	435	102	496
52	Finance and Insurance	85	453	538	(476)
61	Educational Services	61	223	284	1,005
53	Real Estate and Rental and Leasing	126	206	332	331
11	Agriculture, Forestry, Fishing and Hunting	(153)	169	15	142
71	Arts, Entertainment, and Recreation	(75)	99	23	463
51	Information	(156)	246	90	(1,241)
55	Management of Companies and Enterprises	16	11	26	945
22	Utilities	(45)	51	6	(37)
21	Mining, Quarrying, and Oil and Gas Extraction	(109)	35	(73)	117
99	Unclassified Industry	(11)	6	(6)	(3)
Total		(5,949)	19,825	13,875	(8,929)

Source: Emsi

## Location Quotient Analysis

A location quotient (LQ) analysis compares the concentration of a regional industry to the concentration of the same industry across the country. By comparing regional employment patterns to that of the country as a whole, we can identify industries with high local concentration that may represent specialization and competitive advantages of the CTCOG Region. Note that we generally consider LQ values above 1.20 or below 0.80 as "significant."

The table to the right contains the results of the LQ analysis for CTCOG Region at the 4-digit NAICS code level. The Region has a high concentration of jobs in the **Federal Government - Military** industry. The CTCOG Region also has a high industry concentration of jobs in **Pipeline Transportation of Crude Oil; Hunting and Trapping;** and **Support Activities for Air Transportation.**

All of the top thirty (30) 4-digit industries by LQ are considered highly concentrated, producing far more goods and services than are required by local demand, making them important export-led economic drivers.

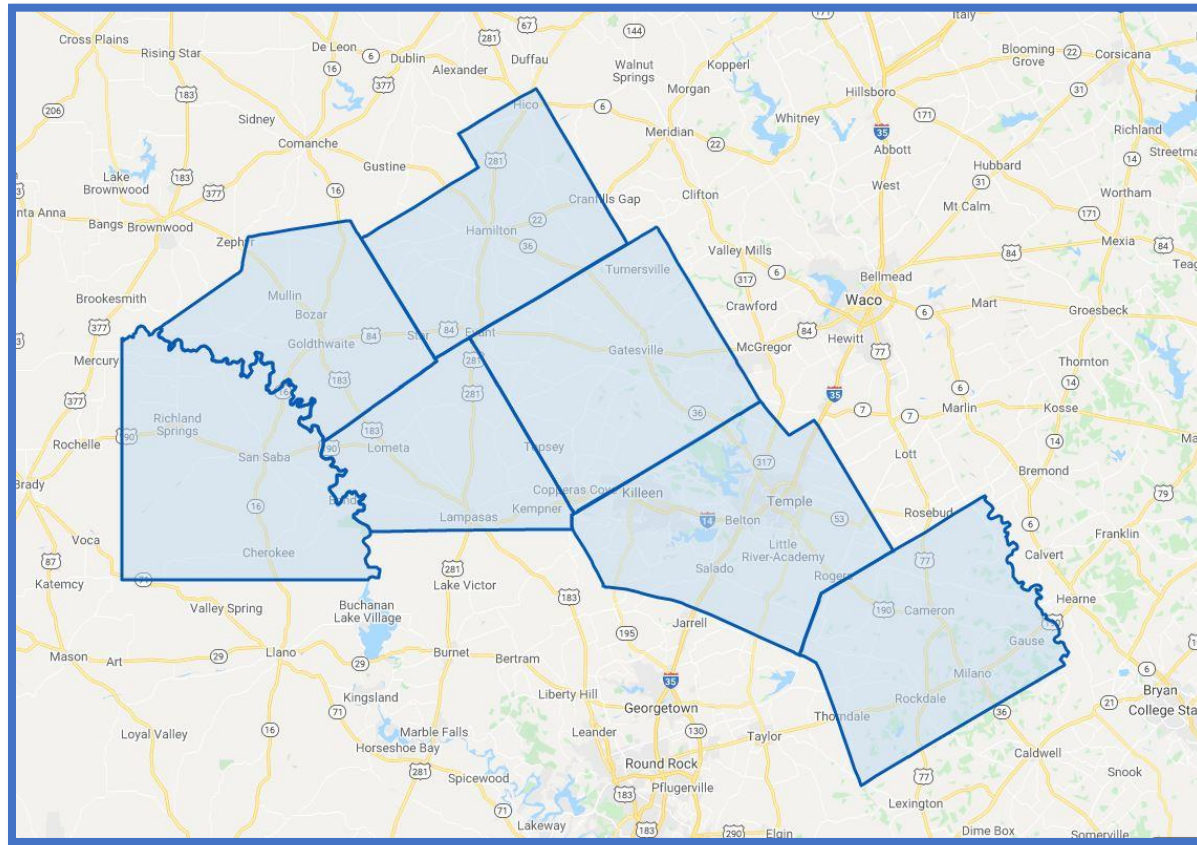
NAICS	Industry	2021 Jobs	2021 % of Total Jobs	2021 LQ
9012	Federal Government, Military	36,428	17.50%	14.76
4861	Pipeline Transportation of Crude Oil	146	0.07%	7.53
1142	Hunting and Trapping	55	0.03%	7.17
4881	Support Activities for Air Transportation	1,320	0.63%	4.74
6115	Technical and Trade Schools	702	0.34%	4.38
3315	Foundries	521	0.25%	3.81
3222	Converted Paper Product Manufacturing	1,143	0.55%	3.33
9011	Federal Government, Civilian	10,995	5.28%	2.85
4245	Farm Product Raw Material Merchant Wholesalers	230	0.11%	2.53
2123	Nonmetallic Mineral Mining and Quarrying	290	0.14%	2.24
5612	Facilities Support Services	458	0.22%	2.20
4821	Rail Transportation	605	0.29%	2.16
3261	Plastics Product Manufacturing	1,521	0.73%	2.13
5222	Nondepository Credit Intermediation	1,533	0.74%	2.08
3312	Steel Product Manufacturing from Purchased Steel	151	0.07%	1.99
1152	Support Activities for Animal Production	122	0.06%	1.92
9036	Education and Hospitals (Local Government)	20,351	9.78%	1.86
3372	Office Furniture (including Fixtures) Manufacturing	297	0.14%	1.86
4244	Grocery and Related Product Merchant Wholesalers	1,786	0.86%	1.82
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	516	0.25%	1.72
3111	Animal Food Manufacturing	153	0.07%	1.71
4413	Automotive Parts, Accessories, and Tire Stores	1,286	0.62%	1.70
2213	Water, Sewage and Other Systems	122	0.06%	1.69
3339	Other General Purpose Machinery Manufacturing	539	0.26%	1.61
2362	Nonresidential Building Construction	1,666	0.80%	1.47
4884	Support Activities for Road Transportation	233	0.11%	1.45
1120	Animal Production	798	0.38%	1.40
4522	Department Stores	1,517	0.73%	1.34
6216	Home Health Care Services	2,618	1.26%	1.31
6221	General Medical and Surgical Hospitals	8,067	3.88%	1.31

Source: Emsi



# Real Estate Market Analysis

The following market analysis uses CoStar data on industrial, commercial, and multi-family residential real estate trends in the CTCOG Region, shown below with county boundaries.

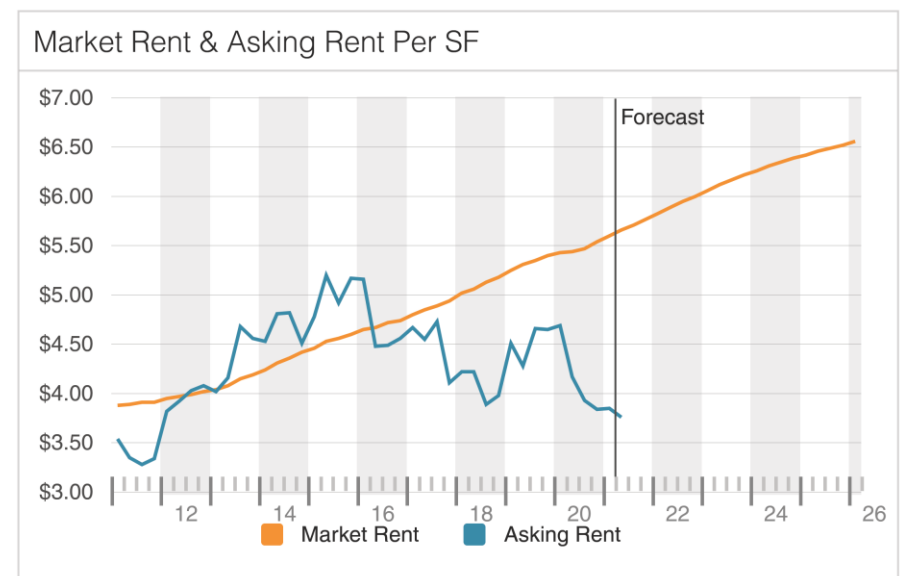
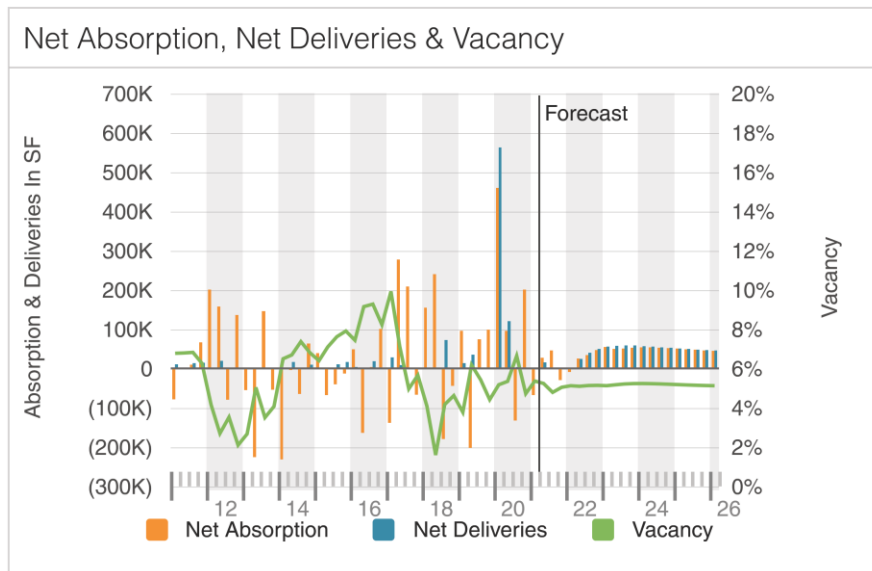


## Industrial

According to the most recent CoStar data, there is approximately 10.4 million square feet of industrial real estate in the CTCOG Region. Over the last ten years, the Region's industrial real estate has been notably volatile in terms of vacancies and net absorption. Vacancy rates have fluctuated between 2% to 10%, averaging around 6% from 2010. There have been only minor deliveries to the industrial market over the last ten years, with the exception of Q1 2020 with a net delivery of about 550,000sf.

Market rents have consistently grown between 1% and 6% per year from 2011, with current market rent at \$5.60 per square foot, still modest as compared to rates in large metros such as Austin or Dallas.

### Industrial Real Estate Trends: CTCOG Region



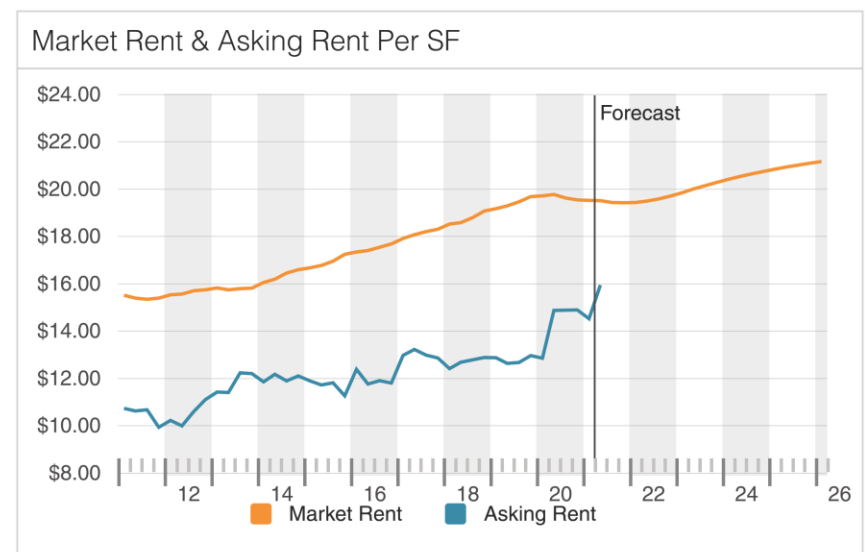
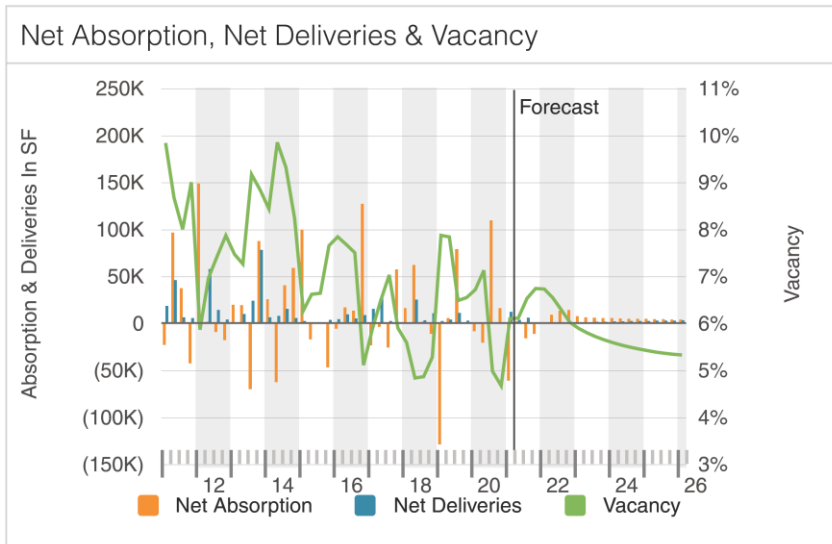
Source: CoStar

## Office

As of April 2021, the Region's office inventory includes 5.1 million square feet of space. Vacancy rates in the office space have been volatile but gradually decreasing over the last ten years to 6% as of Q1 2021. There have been several small deliveries to the office market since 2011. In general, these deliveries were absorbed in the same year of delivery, indicating demand for office space.

Since 2014, rent prices have increased by roughly between 1% and 7% per year. Current market rent for office space in the Region is \$19.51 per square foot.

### Office Real Estate Trends: CTCOG Region



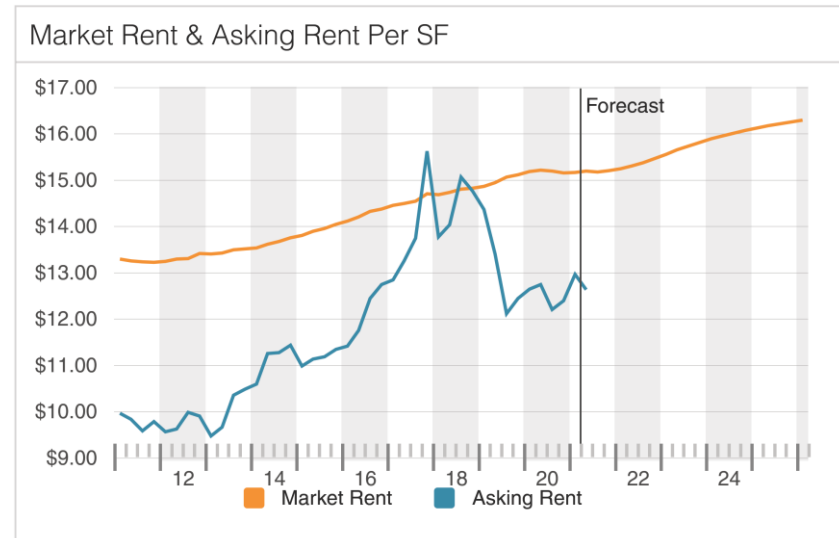
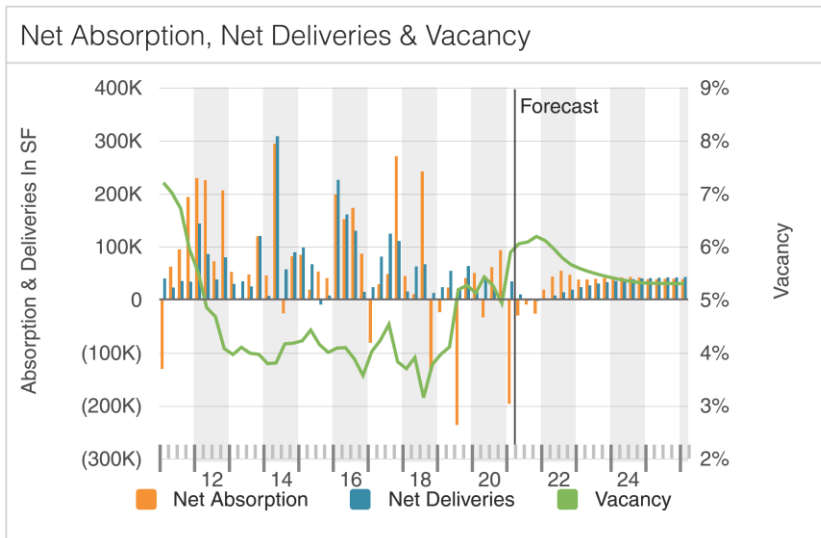
Source: CoStar

## Retail

The CTCOG Region's retail real estate market has also shown strong fundamentals over the last ten years. Vacancy rates held in the 4% range since 2011, until recently when they hit 6% due to the pandemic. There have been several deliveries to the retail market each year, most of which were absorbed in the same year. There is a strong and persistent demand for retail space in the CTCOG Region.

From 2011, rental rates have grown steadily by between 1%-3% per year. Current rent prices for retail real estate in the Region are \$15.18 per square foot. Rent prices are projected to consistently grow through 2026, but will remain modest compared to metro areas.

### Retail Real Estate Trends: CTCOG Region



Source: CoStar



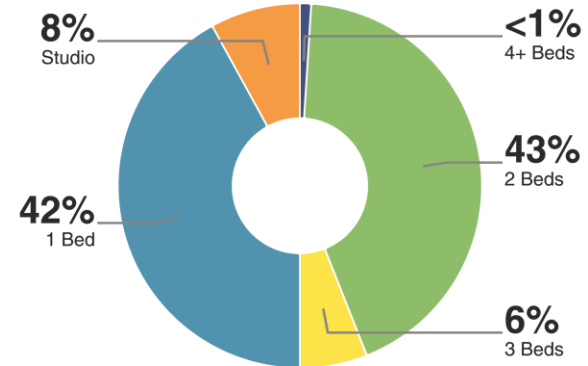
## Multi-Family Residential

There are approximately 25,000 multi-family units in the CoStar database across the CTCOG Region. Of these, 85% are one- and two-bedroom units. Vacancy rates have dropped significantly over the last four years from 11.5% to near 6.5% today. There have been several deliveries to the market since 2011, which were quickly absorbed.

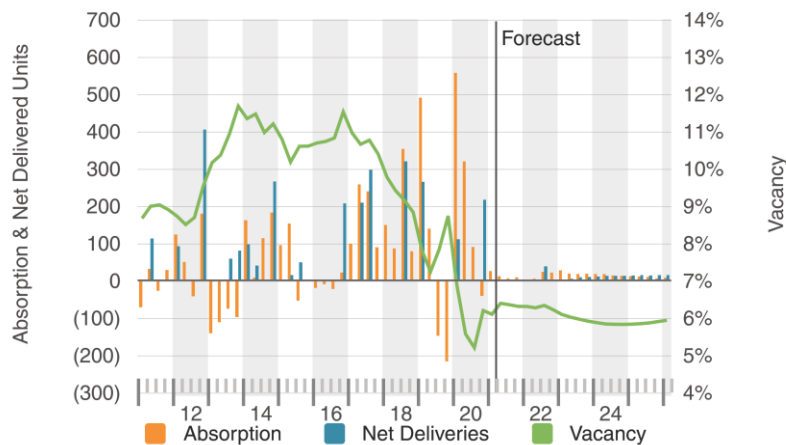
Multi-family per-unit asking rents have been steadily rising across all bedroom types over the last ten years and are currently at around \$1.00 per square foot per month.

### Multi-Family Real Estate Trends: CTCOG Counties

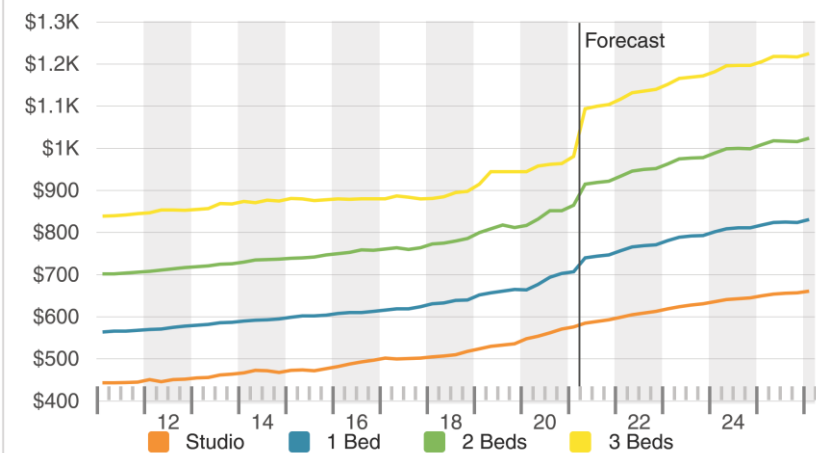
Total Units By Bedroom



Absorption, Net Deliveries & Vacancy



Market Asking Rent Per Unit By Bedroom



Source: CoStar

# Appendix B: Planning Workshop Summaries

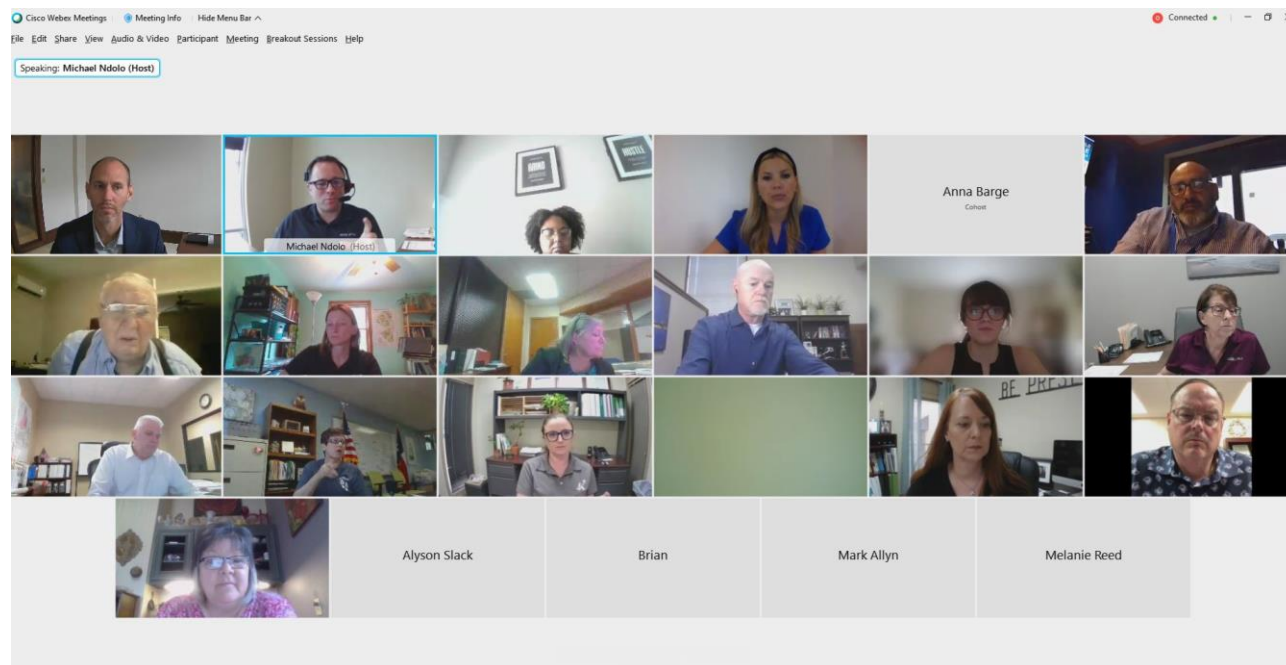
## Summary of Workshop #1: Opportunities and Challenges (June 3, 2021)

### Introduction

On June 3, 2021, CTCOG/DDCT convened a workshop of stakeholders to discuss the Strengths, Weakness, Opportunities and Threats/Challenges (SWOT) facing the region. Below are the results of the polling and discussion groups from that workshop.

### Attendees

Stakeholders: Tammy Cockrum, Keith Sledd, Phyllis Gogue, Mark Allyn, Melanie Reed, Kerry Fillip, Rhett Parker, Barbara Holly, Brian O'Connor, Rebekah Moon, Michelle Morgan, Lenna Barr, Roque Aguon, Dean Roome, Charley Ayres. MRB Group Staff: Janet Sheguit, Jordan Everhart, Alyson Slack. CTCOG/DDCT Staff: Anna Barge, Helen Owens, Kendra Coufal, Hope Geiger.



### Poll Results – Strengths

Participants were provided the list of Strengths from the 2017 CEDS, shown below, and asked to vote whether those items continue to be Strengths in the region in 2021. Fourteen stakeholders voted, as shown below.

- |   |       |
|---|-------|
| • Population and job growth                 | 10/14 |
| • Low cost of living                        | 11/14 |
| • Central location                          | 14/14 |
| • Natural resources                         | 10/14 |
| • Accessibility to higher education         | 12/14 |
| • Quality of life                           | 11/14 |
| • Large military presence                   | 13/14 |
| • Transportation routes and highway systems | 14/14 |
| • Access to healthcare system               | 12/14 |

In addition, one or more participants listed the following as additional Strengths of the region:

- Available land for industrial, residential and business growth
- Proximity to Austin and ease of commuting to Austin
- Friendliness of small communities
- Strong local governments
- Multiple parks and recreation opportunities
- Diverse population
- Growth in technology companies
- Historic buildings
- Mature infrastructure
- Air service connectivity from GRK to national and international routes
- Tourist destinations and cultural diversity

## Poll Results – Weaknesses

Participants were provided the list of Weaknesses from the 2017 CEDS, shown below, and asked to vote whether those items continue to be Weaknesses in the region in 2021. Thirteen stakeholders voted, as shown below.

- |  |       |
|--|-------|
| • Limited telecommunications                             | 13/13 |
| • Limited water/wastewater                               | 11/13 |
| • Lack of high paying jobs                               | 13/13 |
| • Lack of night life/entertainment                       | 10/13 |
| • Educational disparities, especially for rural counties | 11/13 |
| • Limited affordable programs for youth                  | 10/13 |

In addition, one or more participants listed the following as additional Weaknesses of the region:

- Poor high-speed broadband internet availability, especially in rural areas.
- Missing reliable/affordable public transportation.
- Lack of regional solution to water and sewer issues, aging infrastructure.
- Missing grocery and other retail in small communities.
- Limited tax base.
- Poor cross-community communication.
- Lack of coordinated messaging for Central Texas to recruit businesses and promote communities.
- Low availability of affordable child care.
- Missing event programming.
- Lacking technology jobs, entrepreneur opportunities.
- Need more talent with education at Masters and PhD levels.
- Loss of rural hospitals.



## Breakout Session Results – Threats/Challenges

In this portion of the meeting, we reviewed the Threats/Challenges from the 2017 CEDS, shown below, and broke into three separate groups to discuss.

### Threats from Previous CEDS

- Base Realignment and Closure (BRAC)
- Resource constraints (water, transit, agriculture)
- Uncontrolled population growth
- Restrictive federal policies
- Political disconnect between local and state governmental authorities
- Limited public-school funding

We then reconvened and shared what each of the groups discussed and the major Threats/Challenges the region needs to address in the new CEDS. One or more groups noted the following:

- Economic damage from COVID-19.
- Local governments obtaining pandemic relief allocation of funds from the state and federal government.
- Energy crisis with ERCOT and its impact on the region and its communities.
- New constraints on local government imposed by the state legislature, including the redefinition of debt, limits on annexation, limits on ability to raise revenue.
- Infrastructure: local budget constraints to maintain existing infrastructure, finding funding for infrastructure improvements, regional solutions for water/sewer/transportation, sewer systems are expensive and unattractive to businesses, need a regional water/sewer plan.
- Transportation: replacing roadways after the big freeze, lack of public transit, conditions of roads unappealing.
- Marketing: Finding ways to promote our communities, tourism marketing.
- Planning for the future: need a regional land use plan, controlling population growth, master planning for cities.
- Fixing broadband issues.
- Airport: lack of hangar space, marketing the regional airport, constant competition with Austin, poor air traveler capture, lack of branding.
- Tax appraisals: fixing a broken system.
- GIS: communities not up to speed, inconsistency in property addresses.
- Business parks: out of rail space for distribution facilities, need to identify business parks and locations to build.

## Breakout Session Results – Opportunities

Likewise, we reviewed the Opportunities listed in the previous CEDS, shown below, and broke out into discussion groups.

### Opportunities from Previous CEDS

- Digital infrastructure readiness
- Unified development codes
- Military transition
- Talent retention
- Smart traffic solutions
- Alternative energy sources
- Developable land
- Business retention investments

We then reconvened and shared what each of the groups discussed and the major Opportunities for the region that should be addressed in the new CEDS. One or more groups noted the following Opportunities for the region:

- Workforce: existing, trained workforce; retaining local high school graduates, retaining military personnel coming off of Fort Hood, training for water/wastewater operator licenses, educating businesses about the high level of training Fort Hood soldiers receive.
- Resiliency: Disaster planning guidelines, procedures, continuity of operations planning, local and regional emergency operations planning, checklist guide for emergency operations.
- Broadband: rural broadband expansion is a “must” for both residents and businesses, using ARPA money to create networks, using for talent attraction and attracting remote workers.
- Research park as the basis for an innovation zone.
- Residential growth: key to retaining people will be creating housing options.
- Airport: create a master plan.
- Regional marketing and tourism plan: Central Texas as the “hub” of the major metros, messaging around Interstate I-14 improvements/expansion, cultural diversity, embracing of the “rural way”, include local/mom-and-pop businesses, regional marketing and land use plan; similar model to Grand Central Texas, highlight archaeological digs; Camino trails; Indian sites, historical heritage tourism. Central Texas is home to three different ecosystems (Central Plains, East Texas, and the Hill Country).

- Tesla Plant: the new plan would create jobs and opportunities for new businesses that can manufacture parts to supply Tesla.
- CTCOG: Quarterback of the regional efforts, education, grants research; ensure that future businesses and opportunities align with regional economic development goals and initiatives; be involved in facilitating that all people have access to the same level of broadband, regardless of where they live.

## Summary of Workshop #2: Resiliency and Recovery (June 17, 2021)

### Introduction

On June 17, 2021, CTCOG/DDCT convened a workshop of stakeholders to discuss topics around resiliency and recovery in the region. Below are the results of the polling and discussion groups from that workshop.

### Attendees

Bobby Whitson, Jordan Everhart, Michael N'dolo, Alyson Slack, Anna Barge, Kerry Fillip, Dean Roome, Janet Sheguit, Tammy Cockrum, Keith Sledd, Hope Geiger, Barbara Holly, Uryan Nelson, Melanie Reed, Rhett Parker, Brian O'Connor, Ken Wilkerson.





### Poll Results – Disaster Priorities of the Region

Participants were provided a list of potential disasters the region faces, including natural disasters, man-made disasters, system failures and others. Participants were asked to select the five most important items on this list that the region should focus on in its disaster preparedness. The results are below. Items in bold/underline are the top five selections of the entire group.

• Hurricane	1/15 (7%)
• Tornado	4/15 (27%)
• <b><u>Flood</u></b>	<b><u>7/15 (47%)</u></b>
• <b><u>Drought</u></b>	<b><u>8/15 (53%)</u></b>
• <b><u>Extreme heat</u></b>	<b><u>7/15 (47%)</u></b>
• Decline of a significant industry	4/15 (27%)
• Closure of a major employer	5/15 (33%)
• Terrorism	1/15 (7%)
• <b><u>Cyber attack</u></b>	<b><u>7/15 (47%)</u></b>
• Industrial accidents	0/15 (0%)
• Civil unrest	0/15 (0%)
• Water / sewer system failure	3/15 (20%)
• <b><u>Electric grid failure</u></b>	<b><u>9/15 (60%)</u></b>
• Natural gas system failure	0/15 (0%)
• Dam failure	1/15 (7%)
• Emergency response system failure	1/15 (7%)
• Pandemic (other than COVID-19)	2/15 (13%)

In addition, one or more participants listed the following as additional potential disaster priorities:

- Wildfire
- Climate change
- BRAC (Base Realignment and Closure)

### Poll Results – Regional Approaches to Resiliency

Participants were provided a list of the ways in which regional organizations can serve to promote resiliency, taken from “Planning for a More Resilient Future: A Guide to Regional Approaches” (National Association of Development Organizations).

- |  |                          |
|--|--------------------------|
| • <b><u>Cross-jurisdictional connections</u></b>   | <b><u>7/13 (54%)</u></b> |
| • Strong networks                                  | 2/13 (15%)               |
| • <b><u>Knowledge of funding opportunities</u></b> | <b><u>8/13 (62%)</u></b> |
| • Managers of external funding                     | 1/13 (8%)                |
| • <b><u>Resiliency Plans</u></b>                   | <b><u>6/13 (46%)</u></b> |
| • Technical expertise                              | 5/13 (38%)               |
| • <b><u>Communication/convening</u></b>            | <b><u>4/13 (46%)</u></b> |
| • Vulnerable populations                           | 1/13 (8%)                |

Participants noted that a regional organization, like CTCOG, best serves the region's resiliency needs by making cross-jurisdictional connections, keeping abreast of funding opportunities, planning around resiliency, and communicating/convening stakeholders on the topic.

## Breakout Session Results – Response Planning

We then held breakout sessions to discuss the following questions:

- Where are there still weaknesses in our region's ability to respond to a future shock?
- What needs to be done, if anything, to improve our region's ability to respond to such a future shock?

Participants were asked to consider all types of shocks: weather, economic, man-made, system failure, the unknown shocks. The groups reconvened and shared their conclusions:

- Resume CTCOG-sponsored periodic emergency drills on various scenarios.
- Coordinate the development and maintenance of jurisdiction-specific protocols for emergency communications and operations, including Severe Weather Emergency Response Plans.
  - CTCOG can provide templates and best practices, review plans, host a "Small Town Summit" to accomplish this, coordinate basic emergency planning meetings on an ongoing basis, and assist smaller towns in setting up social media channels to reach residents. Leverage FEMA's National Incident Management System (NIMS) training program. Consult existing plans that have been collected by counties.
  - Plans and protocols should account for frequent overturn in municipal leadership; leverage TV and radio for residents without social media; and include protocols for regional communication (between municipalities/counties/CTGOG and from CTCOG to all cell phones in the area).
- Develop and centrally store templates for municipalities to send out emergency information such as boil notices.
- Develop and disseminate educational materials to households about how they can individually prepare to sustain themselves longer without utilities or transportation, freeing up municipalities to focus on getting infrastructure back up and running rather than tending to the emergency needs of individual households. E.g., educate people on how to reduce their electrical consumption during a heat wave; provide disaster kits; etc.
- Proactively conduct outreach and assistance to residents of mobile homes and other vulnerable structures (e.g. via door hangers), encouraging and facilitating repairs and other measures to make them more resistant to storm impacts. Involve the Housing Divisions, Offices on Aging, Hill Country Community Action etc., facilitated by CTCOG. Encourage municipalities to make themselves satellite offices for certain CTCOG functions like intaking weatherization applications.
- Continue investing in and hardening broadband and cellular networks, which are critical to keeping people connected and informed during an emergency.
- Identify facilities that can house displaced/evacuated residents and serve as command-and-control centers (e.g. schools, municipal buildings), and prepare them with backup generators and caches of food and water, and

plans for transportation. Particularly identify facilities that would be used by residents of smaller, more rural communities.

- Identify and pursue funding sources for critical elements of emergency response.

### Breakout Session Results – Preparedness Planning

We then held a second set of breakout sessions to discuss the following questions:

- Given the disasters discussed earlier, where are there still weaknesses in our region's ability to avoid or withstand a future shock?
- What can your community and/or CTCOG do to enhance our ability to avoid or withstand a future shock?

Participants were again asked to consider all types of shocks: weather, economic, man-made, system failure, the unknown shocks. The groups reconvened and shared their conclusions, below. Although many planning and response functions will fall to the local level and will necessarily be decentralized, CTCOG is seen as an organization that can coordinate these efforts, lead the development of interjurisdictional communication and cooperation.

- Assist “Town/City Halls” and other core municipal offices in developing strategies to continue to function in remote and mobile formats.
- More generators are needed at priority locations that can serve as warming/cooling centers and have power for oxygen machines, other assistance devices, and refrigeration of medication; with plans for how to transport vulnerable populations (e.g. seniors) to those locations. Diesel generators with 5-7 day capacity are needed.
- Consider processes for towns to further build relationships with their residents so that they know who has special needs and risks in the event of a crisis.
  - Consider Belton's life-saving “R U OK?” program as a model; team of volunteers and part-time staff member regularly check in on senior citizens, and local real estate agents donate lock boxes so that emergency personnel can more easily do welfare checks.
  - Low-income groups also experience higher risk, with costs of recovery disproportionately high for these households.
- Educate municipalities on how to leverage the Defense Support of Civil Authorities (DSCA) program to secure generators, water, etc. from Fort Hood during crises; include Fort Hood and National Guard representatives in ongoing resiliency planning discussions.
- Conduct exercises/“rehearsals” for how to hook up generators to key components.



- Educate jurisdictions on resources available for cyberattack prevention and mitigation, leveraging Texas Municipal League materials and inquiring with the State about additional resources.
- Evaluate the cyber preparedness of CTCOG's 7-county 911 system.
- Invest in critical infrastructure, including major roadways throughout the COG region that are needed for emergency services, with CTCOG helping communities to prioritize these investments.
- Invest in backup power and communications. Consider investing in use of solar for redundancy.
- As described in the earlier breakout session, educate households about how they can individually prepare to sustain themselves longer without utilities or transportation, freeing up municipalities to focus on getting infrastructure back up and running rather than tending to the emergency needs of individual households.
- Coordinate efforts to assist businesses in developing continuity plans, perhaps in partnership with or under the leadership of chambers of commerce.
  - MRB Group suggestion: Investigate supply chain localization strategies to make businesses more resilient to economic shocks.
- Evaluate scenarios for how people will access emergency medical services (and basic needs such as accessing insulin when it spoils due to heat), in the context of less rural hospitals than their used to be.

## Appendix C: Stakeholder Survey Summary

In early April 2021, the CTCOG issued a request for information to municipalities across the CTCOG region. A total of 13 responses were received, which included the cities of Belton, Copperas Cove, Gatesville, Hamilton, Killeen, Lampasas, Lometa, Milano, and Nolanville; the counties of Bell, Hamilton, and Mills; and the Salado Independent School District.

This survey informed us of the most pressing challenges facing CTCOG constituent communities, and focused our CEDS work in the subsequent months. Several common issues were identified by respondents, revealing these high-need focus areas:

- Infrastructure: Almost every respondent identified infrastructure as a top priority for the region. Broadband internet was the single most commonly cited issue, but other infrastructure priorities included transportation, power, water and sewer.
- COVID-19 Related Impacts: Several respondents included priorities focused on general COVID-19 impacts on businesses with a focus on tourism, the hospitality sector, and real estate, as well as occupation-specific mentions of healthcare professionals, school teachers, and students.
- Technology and Workforce Development: Many respondents included technology funding and capacity building for businesses and schools as a priority, including the need for workforce development programs that focus on improving technology skills.

In terms of current resources and planning, nearly half of the respondents identified having a recent economic development strategy. Most of the communities have not implemented any COVID-specific recovery plan and about half of the respondents provided COVID-specific program resources, including technical assistance and funding opportunities.

In general, we found a high degree of variability across the region related to response efforts, some of which may be explained by the varied level of impacts of the pandemic as well as municipality type (e.g. city versus county). What follows is more detail about responses to the survey.

## Information Request Answers

### Plans and Strategies

- What is your community's most recent economic development strategy?
- Has your community adopted any COVID-19-specific economic recovery plans?

Of the 13 respondents, eight indicated that they have an existing Economic Development Strategy or support economic development through tax abatements and/or the Property Assessed Clean Energy (PACE) program. Two cities have implemented initiatives to support COVID-specific recovery:

- The City of Belton offered Coronavirus Small Business Relief Grants. The objective was to assist with the pandemic recovery efforts of local small businesses.
- The Nolanville EDC created a COVID-19 Business Bridge Program that aided Nolanville-based small businesses with 25 or fewer employees impacted by COVID-19. The program provided \$60,000 in local government-funded grants for eligible small businesses that were independently owned and operated.

Other cities and counties have directed their workforce and businesses to various COVID recovery resources available online in place of a formally adopted plan. These resources generally include available local, state, and federal funding opportunities.

### Programs and Resources

- Has your community created any COVID-19-specific recovery programs or resources?
- What programs and resources (other than the above) do you typically refer your businesses and municipalities to with respect to COVID-19 recovery and resilience?
- Are you aware of any “best practices” programs or resources that other communities have implemented that we could bring to the region?

In terms of COVID-specific programs and resources, cities and counties have provided a variety of information to businesses and the workforce that include small business assistance, rent assistance, and funding opportunities. A majority of the programs were funded through the CARES Act.

- Six out of the 13 respondents reported developing COVID-specific recovery programs.

- Some of the respondents within the CTCOG region provided some type of Business Assistance/Grants Program. These programs assisted businesses in helping with operating costs, utility bills, and support for marketing and advertising.
- Other programs include rent/mortgage assistance, child care, telemedicine, and meal assistance for seniors.
- Other resources respondents refer businesses and the workforce to include local financial institutions for the Paycheck Protection Program and Small Business Loans, Chambers of Commerce, and the Central Texas Business Resources Center.

Respondents were also asked to identify examples of "best practices" that other communities have implemented. Some of these examples included programs for business rental/mortgage assistance, larger marketing and advertising programs, virtual communication, housing, jobs, and physical and mental health.

#### Topics and Priorities

In addition to certain pre-identified topics, the following were identified by respondents to the survey as areas of interest:

- Small government grant application assistance.
- Public safety infrastructure.
- Dealing with lack of quality-of-life alternatives during quarantine periods.
- Encourage business innovation through incentive funding for breakthrough projects.
- Business Waste Streams; EDC involvement in solving industry end products issues.

## Appendix D: Alignment with Other Plans

This CEDS builds on existing relevant regional and local planning documents, including the following:

- CTCOG Comprehensive Economic Development Strategy (2017-2021).
- The most recent local Comprehensive Plans and Master Plans for Hamilton County; the City of Belton; City of Cameron; City of Copperas Cove; City of Gatesville; City of Hamilton; City of Harker Heights; City of Killeen; City of Lampasas; City of Morgan's Point Resort; City of Nolanville; City of Rockdale; Village of Salado; City of Temple; and the City of Troy.
- Hazard and emergency planning materials including the CTCOG 2020 Threat and Hazard Identification and Risk Assessment (THIRA); 2020 Stakeholder Preparedness Review (SPR); CTCOG Regional Hazard Mitigation Action Plan (2018-2023); Killeen-Temple Metropolitan Planning Organization Asset Vulnerability and Resiliency Study; U.S. Economic Development Administration's "Resources for Economic Recovery Planning;" and National Association of Development Organizations' "Planning for a More Resilient Future: A Guide to Regional Approaches" (2015).
- Downtown Master Plans for the City of Copperas Cove, City of Killeen, and City of Rockdale.
- Transportation plans including the Killeen-Temple MPO 25-Year Transportation Plan ("Mobility 2045"); and Bell County Thoroughfare Plan (2001-2025).
- Belton Economic Development Corporation Work Plan (2021-2023).
- Copperas Cove Economic Development Corporation June 2019 workshop summary memo.
- Parks and Recreation Master Plans for the City of Cameron (2020-2030) and Morgan's Point Resort (2016).
- City of Cameron 5-Year Improvement Plan for Wastewater System (2014).
- Milam County Community Action Plan (for broadband).



# Appendix E: Post-Pandemic Toolkit

## Resources for Remote Work and Communication

### **“When governments go remote,” McKinsey and Company**

As COVID-19 forces government organizations to embrace virtual work, leaders must reimagine how they engage and collaborate with their colleges. This article provides basic tools for remote working.

<https://www.mckinsey.com/industries/public-and-social-sector/our-insights/when-governments-go-remote>

### **“Tips for Effectively Communicating with the Whole Community in Disasters,” FEMA:**

Practices regarding effective communication to help jurisdictions meet their obligations to carry out their disaster related activities in a non-discriminatory manner.

<https://www.dhs.gov/publication/tips-effectively-communicating-protected-populations-during-preparedness-response-and>

## Resources for Community Preparedness

### **“Preparedness Toolkit (PrepToolkit),” FEMA**

- Collaborative Environment: Share ideas, information, files, and data with peers and stakeholders from across the Nation
- Interactive Tools: Link exercises to the Core Capabilities and targets defined in the latest Threat and Hazard Identification and Risk Assessment guidance
- Scalable Solutions: Designed for agencies, organizations, and jurisdictions of any size and type that lead or support preparedness efforts

<https://preptoolkit.fema.gov/>

### **“Community Preparedness Toolkit,” ready.gov**

The Community Preparedness Toolkit provides step-by-step directions along with useful resources for making your community safer, more resilient, and better prepared. The Toolkit can be used to develop a community-based approach

to preparedness, such as a Citizen Corps Council—FEMA's grassroots strategy to bring together government and community leaders to involve citizens in all-hazards emergency preparedness and resilience.

<https://www.ready.gov/community-preparedness-toolkit>

### **“Defense Primer: Defense Support of Civil Authorities,” Congressional Research Service**

Defense support of civil authorities in response to disasters is typically carried out in accordance with the National Response Framework (NRF), which is a structure of preparedness that guides the nation in responding to domestic disasters and emergencies.

Under the NRF framework, local and state governments are expected to put forth their best effort during incidents within their jurisdiction. They should only request federal assistance when their resources are overwhelmed. At that point, DOD may provide support in response to the Request for Assistance (RFA), typically as part of a broader federal response.

Examples of Defense Support of Civil Authorities:

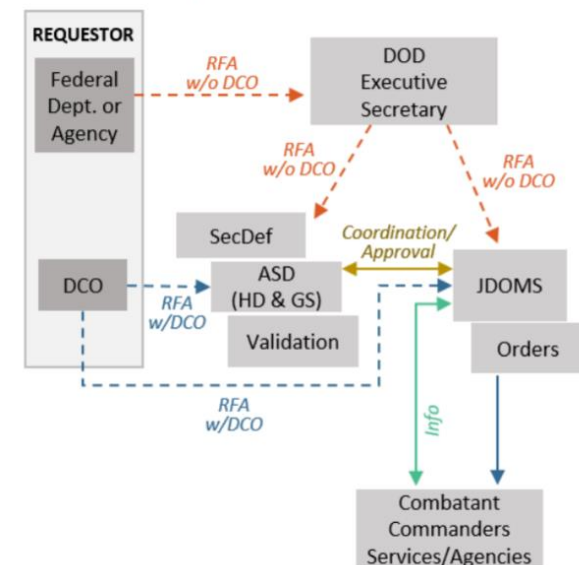
- Response to natural disasters
- Special events
- Border security
- Oil spill response
- The COVID-19 response

DOD evaluates requests based on six criteria:

- Legality: compliance with the law
- Lethality: potential for use of lethal force by or against DOD personnel
- Risk: safety of DOD personnel
- Cost: source of funding and effect on the DOD budget
- Readiness: impact on DOD's ability to perform its primary mission
- Appropriateness: whether providing the support is in the interest of DOD

<https://sgp.fas.org/crs/natsec/IF11324.pdf>

**Figure 1. The Request for Assistance (RFA) Process**



**Evaluation Criteria:** Legality, lethality, risk, cost, readiness, appropriateness

### **“Cyber Risks to Next Generation 911,” Department of Homeland Security**

Traditional 911 services typically operate over standard voice-based telephone networks and use software, such as computer-aided dispatch systems, that operate on closed, internal networks with little to no interconnections with other systems. As cyber threats grow in complexity and sophistication, attacks could be more severe against an NG911 system as attackers can launch multiple distributed attacks with greater automation from a broader geography against more targets.

[https://www.911.gov/pdf/OEC\\_Fact\\_Sheet\\_Cyber\\_Risks\\_NG911.pdf](https://www.911.gov/pdf/OEC_Fact_Sheet_Cyber_Risks_NG911.pdf)

### **Resources for Businesses**

#### **“Coronavirus Small Business Survival Guide: All Our Content in One Place,” U.S. Chamber of Commerce**

Complete listing of all U.S. Chamber of Commerce resources for small businesses, organized by category to help users easily navigate the content.

<https://www.uschamber.com/co/start/strategy/small-business-resources-for-surviving-coronavirus>

#### **“Business Continuity Plan,” ready.gov**

Development of a business continuity plan in four steps.

<https://www.ready.gov/business-continuity-plan>

#### **“Business Continuity Planning Suite,” ready.gov**

This software was created for any business with the need to create, improve, or update its business continuity plan. The Suite is scalable for optimal use by organizations of any size and consists of a business continuity plan (BCP) training, automated BCP and disaster recovery plan (DRP) generators, and a self-directed exercise for testing an implemented BCP. Businesses can utilize this solution to maintain normal operations and provide resilience during a disruption.

<https://www.ready.gov/business-continuity-planning-suite>

## Resources for Families and Households

### **“Make a Plan,” Ready.gov**

General content for making disaster preparedness plans for families, including several steps and a series of questions that identify whether a household is prepared to handle a disaster. Also includes materials for creating preparedness content such as emergency communication plans, documents to insure property, and information about alerts and warnings.

<https://www.ready.gov/plan>

### **“When Disaster Strikes: Promising Practices – Mobile Home Residents,” mdcinc.org**

A number of factors, including structural and non-structural issues, combine to make mobile home residents particularly vulnerable to natural disasters. Includes resources for preparedness, response, and recovery stages.

<https://www.mdcinc.org/wp-content/uploads/2017/08/When-Disaster-Strikes-Promising-Practices-Mobile-Home-Residents.pdf>

## Resources for Economic Development

### **“CEDS In Action,” CEDS Central**

The goal of the CEDS process is not *just* to create an accessible, well-researched, and engaging planning document. It is ultimately meant to encourage action and create the space for impactful initiatives to emerge that meet the economic development goals of the region. This resource provides examples of transformative projects that were inspired or identified through the CEDS process.

<https://www.cedscentral.com/ceds-in-action.html>

### **“Place Marketing: How One Midwestern City Is Transforming Its Brand,” Shama Hyder**

Placemaking generally refers to a manner of planning and designing public spaces to contribute to a community's quality of life and wellbeing. It's heavily reliant on taking the unique aspects of a specific community and communicating them through design—in other words, creating a space that feels grounded and specific to the community it's in.

<https://www.forbes.com/sites/shamahyder/2019/10/30/place-marketing-how-one-midwestern-city-is-transforming-its-brand/?sh=7d0120272e05>

**“Why Place Branding Is Becoming Place Doing (Consider Austin),” Marian Salzman**

“Branding” suggests that successfully selling a destination, company or individual is simply about giving it some catchy promotion. But selling a location involves so much more than sticking a label on it. Austin shows how ongoing “place doing” works. Actions speak louder than logos. Local marketers have found ways to play up the idea of “keeping Austin weird” without alienating the locals who truly want it that way.

<https://mariansalzman.com/blog/why-place-branding-is-becoming-place-doing-consider-austin/>

**“WealthWorks Rural Economic Development Case Studies,” Carrie Kissel, NADO.org**

Rural wealth creation is an approach to community and economic development that is demand-driven, focusing on market opportunities that capitalize on a community's existing assets or underutilized resources. Wealth creation is intentionally inclusive, building lasting livelihoods for those who may not have been at the table before, and it supports local ownership and control of assets. This series of case studies examines how livelihoods are being improved and communities are undergoing development in a variety of sectors and rural places.

<https://www.nado.org/wealthworks-case-studies/>

**“Reshoring advanced manufacturing supply chains to generate good jobs,” Andrew Fish & Nora Spillane, The Brookings Institution**

The United States has an opportunity to leverage industry-led supply chain resiliency strategies to localize advanced manufacturing and transition workers from low-paying retail and service employment into better jobs. The country can create strategic manufacturing industries in central cities and rural areas, connecting individuals who were disproportionately affected by COVID-19 to these high-quality jobs.

<https://www.brookings.edu/research/reshoring-advanced-manufacturing-supply-chains-to-generate-good-jobs/>

**“The Opportunity Zone Investment Prospectus: Early Observations and Next Steps,” Bruce Katz, Rick Jacobs, & Aaron Thomas**

The Opportunity Zone Investment Prospectus tool is a work in real-time evolution. Cities are adapting the tool to their own distinctive needs and market demands as well as treating the Prospectus as a living document that needs to be continuously refreshed and enhanced.

[https://drexel.edu/~media/Files/nowak-lab/Drexel\\_NMFL\\_ProspectusNextSteps\\_Final.ashx](https://drexel.edu/~media/Files/nowak-lab/Drexel_NMFL_ProspectusNextSteps_Final.ashx)



### **“Opportunity Zone Investment Prospectus Guide – A How-To For Opportunity Zones,” Nowak Metro Finance Lab**

- Section 1: Introduction to the Opportunity Zone Tax Incentive
- Section 2: The Purpose of the Urban Investment Prospectus
- Section 3: Introduction to Your City
- Section 4: Your City by the Numbers
- Section 5: Your City by the Assets
- Section 6: Your City by the Zones

<https://drexel.edu/nowak-lab/publications/prospectuses/prospectus-guide/>

### **Resources for Healthcare**

#### **“Rural Community Health Toolkit,” Rural Health Information Hub**

Provides rural communities with the information, resources, and materials they need to develop a community health program.

<https://www.ruralhealthinfo.org/toolkits/rural-toolkit>

#### **“Optimizing for Systems Change,” Center for Optimizing Rural Health**

This organization works with rural facilities, their providers, and their communities to improve the quality of care, maintain access to care, and address the challenges unique to small hospitals and the towns they serve.

<https://optimizingruralhealth.org/optimizing-for-systems-change/>

#### **“COVID-19: Local Action Tracker,” NLC in partnership with Bloomberg Philanthropies**

This resource tracks COVID-19 responses, relief, and vaccinations. It is the most complete collection of municipal responses to COVID-19.

[https://www.nlc.org/resource/covid-19-local-action-tracker/?\\_zs=PS0EX&\\_zl=5UI22&utm\\_campaign=covid19&utm\\_medium=email&utm\\_source=informz&utm\\_content=newsletter-032420&utm\\_term=text-covid-19-local-action-tracker](https://www.nlc.org/resource/covid-19-local-action-tracker/?_zs=PS0EX&_zl=5UI22&utm_campaign=covid19&utm_medium=email&utm_source=informz&utm_content=newsletter-032420&utm_term=text-covid-19-local-action-tracker)

## Resources for Community Development

### **“Affordable Housing – Toolkit for Counties,” National Association of Counties**

Although housing affordability affects counties of all sizes in every region of the U.S., each county is unique, facing its own set of obstacles and equipped with its own set of tools to navigate these obstacles. This toolkit, therefore, outlines the role of counties in identifying and addressing housing affordability gaps through solutions involving inter-jurisdictional partnerships; funding and financing solutions; planning and zoning strategies; and federal resources. The toolkit includes an appendix, which discusses common housing affordability metrics, reviewing their characteristics and limitations. This toolkit summarizes and builds on research conducted by the NACo Counties Futures Lab throughout 2018.

<https://www.naco.org/resources/featured/affordable-housing-toolkit-counties>

### **“Outdoor Towns Toolkit,” townsandtrailstoolkit.com**

A variety of web-based resources that provide steps and case studies for building community engagement and progressing towards becoming a town that uses its natural assets to bring people together and revitalize economies.

<https://townsandtrailstoolkit.com/>

### **“Trail Planning Workshop – Toolkit,” National Park Service**

Russell Clark designed this step-by-step guide for communities, partners, and local jurisdictions to use in developing and implementing a trail planning workshop. Included are tools to help workshop participants identify community assets, establish trail priorities and brainstorm ideas for future linkages.

<https://www.nps.gov/orgs/rtca/upload/Trail-Planning-Workshop-Toolkit.pdf>

## Resources for Community and Economic Development

### **“Toolkit: Creating and Maintaining Coalitions and Partnerships,” Community Tool Box**

This toolkit provides guidance for creating a partnership among different organizations to address a common goal.

<https://ctb.ku.edu/en/creating-and-maintaining-coalitions-and-partnerships>

### **“Toolkit: Applying for Grants,” Community Tool Box**

Part I gives a step-by-step overview of the grant-writing process. Part II provides a general template for writing a grant application. Completing Part II will give you a solid proposal that can be adapted to meet specific grant opportunities and review criteria for specific funders.

<https://ctb.ku.edu/en/applying-for-grants>

## Appendix F: Regional Marketing for Business Attraction

In correspondence with MRB Group, CTCOG staff requested additional input regarding one of the objectives in the draft Action Plan Matrix, namely to “develop a strong regionally-based business marketing effort.” The following initial ideas would help CTCOG start marketing business in the region and provide a foundation of content for consistent messaging moving forward. These suggestions vary widely in the required cost and effort, but most could be managed internally if desired.

### Key First Step

#### **Decide on and formalize an identity for the region and a vision for business attraction.**

- Develop of place-based brand (if budget allows) – The term “place brand” refers to the idea that cities and regions can be branded by focusing on the qualities and personality of a place, with the goal of increasing consideration, awareness, and perception of that place. It is intended to message what it is like to experience the place rather than focusing on a particular entity (like a government or nonprofit) and its operations. The process of developing a place brand involves multiple phases including research, design, development, and execution. It is also multidimensional, incorporating linkages of products, spaces, organizations, businesses, and people. This is a big commitment, both in terms of upfront development costs and ongoing capacity and/or cost of implementation. There are a few marketing firms that specialize in this type of work. Examples of place brands:
  - South Louisiana ([www.southlouisiana.org](http://www.southlouisiana.org))
  - Northwest, AR ([www.findingnwa.com](http://www.findingnwa.com))
  - Golden Triangle, MS ([www.gtrlink.org](http://www.gtrlink.org))
  - Auburn, NY ([www.takerootinauburn.org](http://www.takerootinauburn.org))

#### **If budget does not allow for a full place branding effort, identify key assets and targets.**

- Key assets – identify unique assets and values that the region has to offer
- Target industries/businesses – identify the kinds of businesses you want to attract. Start with the industries to which your key assets will provide the most value.
- Unique value propositions – develop key messaging and content that reflects your assets and speaks to your targets.

- See <https://www.southlouisiana.org/south-louisiana-business-climate/> & <https://www.southlouisiana.org/key-industry-in-south-louisiana/>
- Logo/Brand – decide if you want a logo and dedicated brand identity. Best to use a marketing professional for this, but could also work with a local graphic design training program.

## Next Steps

### Create targeted content

- Update and utilize existing regional information, as well as your unique value propositions, to create industry specific content for business attraction (e.g. one-pagers targeting site selectors/CEOs, blogs, ads, press releases, etc.). This could be done internally, but the assistance of a marketing or PR firm would be helpful.
- Create a blog or series of articles about unique assets within the region and/or interviews with key community leaders. See <https://takerootinauburn.org/news-blog/> and <https://takerootinauburn.org/our-stories/#podcast>

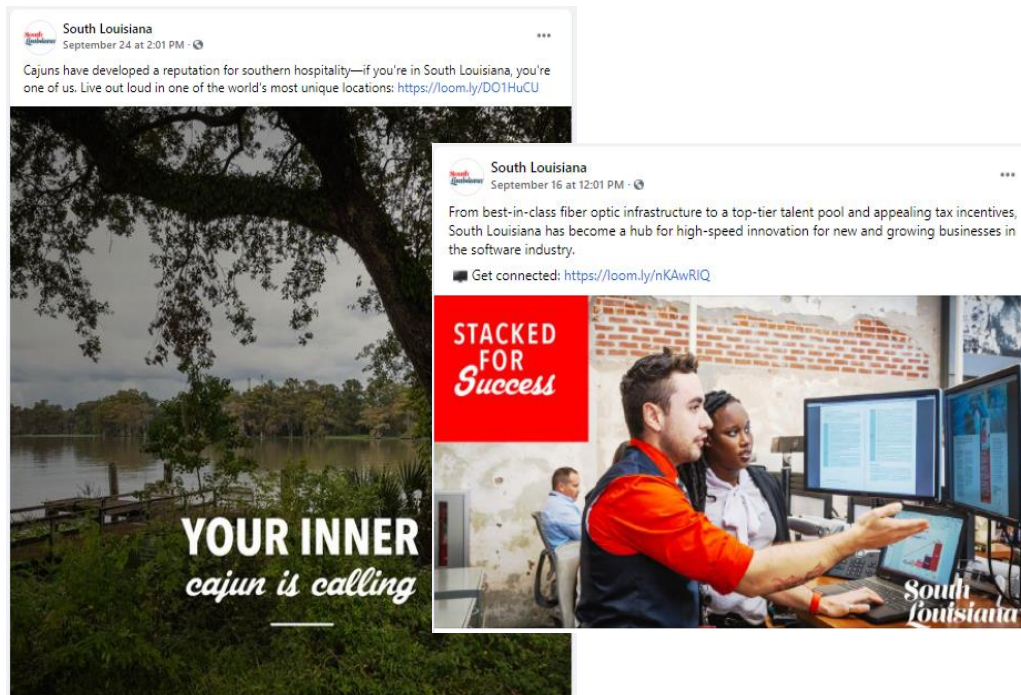




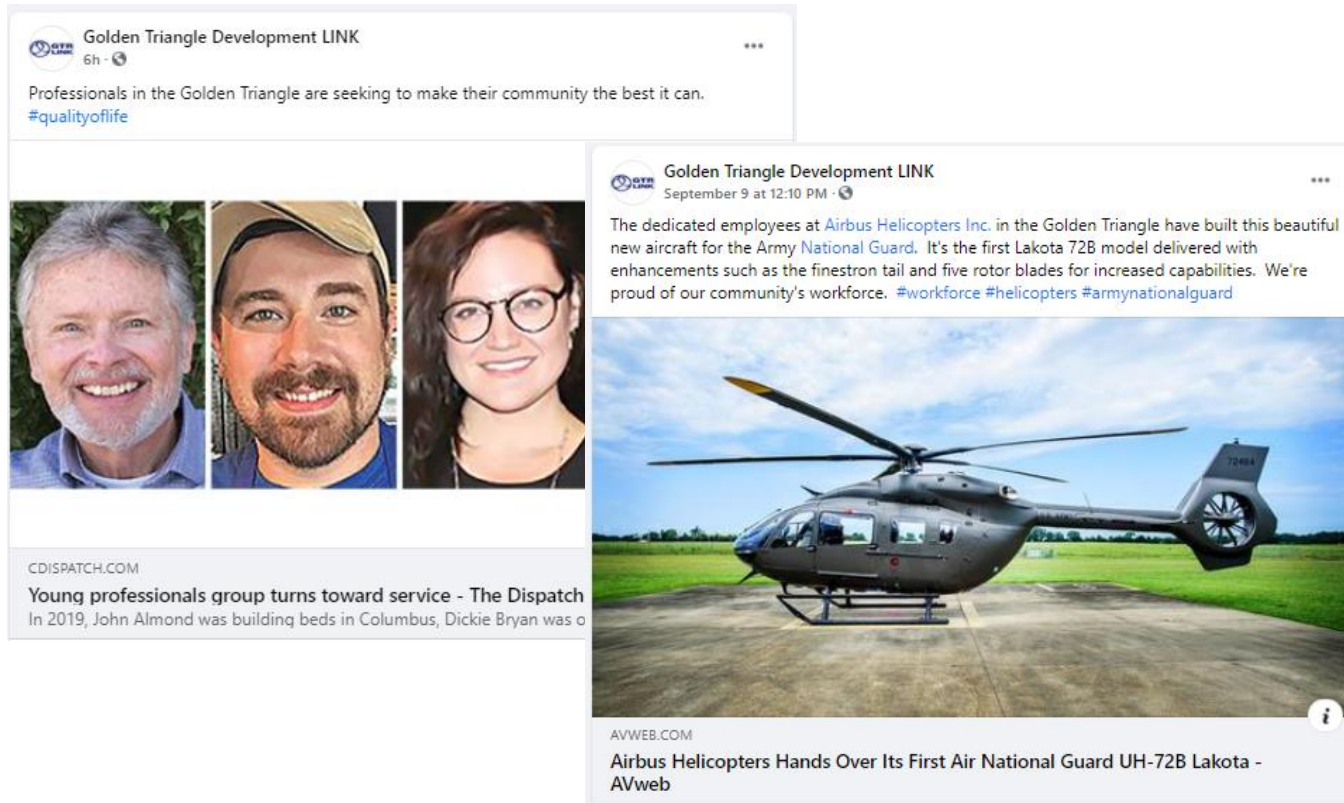
- Create content related to quality of life. The person responsible for setting up shop in the region should want to live there, too. Be sure to have some specific content targeting demographics that tend to like the region (e.g. content about specific activities, the food scene, historic assets, arts and entertainment, etc.). E.g. <https://takerootinauburn.org/2021/02/15/best-local-spots-for-your-furry-friends/>

### Reflect this identity and content on your website and social media.

- Revisit the About page of CTCOG's website. It has no reference to Economic Development specifically, and this could be a good place to share a vision for business development and attraction.
- Share targeted industry content on CTCOG, DDCT, or a new social media presence. Point to your key assets and unique value propositions in this content. See South Louisiana Facebook page: <https://www.facebook.com/southlouisianaED/>



- Use CTCOG, DDCT, or a new social media presence to promote business and industry throughout the region. Share posts from local chambers (and/or encourage them to tag you or use a specific hash tag), articles about positive business news, quality of life content, etc. This provides a place for an interested business or site selector to understand the region beyond the data. A tool like Buffer or Hootsuite could be helpful with this. See Golden Triangle Development LINK Facebook page: <https://www.facebook.com/gtrlink>



## Possible Partners

- DDCT – Consider if DDCT could provide industry and business insights to guide, get feedback on, and prioritize regional strategies, as well as coordination with other partners listed here.
- Existing Industry/Businesses – Convene industry peer groups or business groups to both get feedback and inform them of regional messaging. Businesses can then share that messaging consistently with their non-local suppliers, customers, and peers.
- Local Media – Engage with local and regional media outlets to share your messaging by sending press releases, offering to provide a monthly column about economic development and business activities, interviewing regularly on a radio program, etc. Some businesses and site selectors will look at local media to better understand how business-friendly a community is on the ground.
- Convention and Visitors Bureaus - Leverage regional tourism professionals and organizations to develop/garner regional marketing ideas and tips. Tourism professionals tend to have a lot of practice and creativity when it comes to PR, and they are used to thinking about regional assets. The audiences and content are different from economic development, but they can overlap and that could be an area for learning and/or collaboration.
- Workforce Development/Educational Entities – Leverage entities that are working directly with entrepreneurs and businesses (e.g. colleges, SCORE, SBDC, training programs, etc.) to generate business development and growth leads in your target industries.
- Business Services Providers – Inform business services providers (e.g. accountants, insurance agents, commercial lenders, real estate brokers, etc.) of your targets and messaging to generate business development and growth leads in your target industries, as well as ensure that they are able to talk to their clients about the region in a consistent way.