

Greater Dalton Community & Economic Development Strategy

Community Assessment & Key Takeaways

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Process Overview

Phase 1: Interviews and Online Survey



Phase 2: Community Assessment



Phase 3: Community and Economic Development Strategy



Phase 4: Implementation Plan

Today's Meeting

Goal for today:

- Discuss the results of the interviews, survey, and Community Assessment phase of the project and the key takeaways from that Assessment

What's Next?

- Phase 3 is the development of a community & economic development strategy
- Phase 4 is the implementation phase
- Completion of the entire project is scheduled for May

When do we talk about what we're going to do?

Strategic development process:

- Phases 1 & 2 are the “Where are we now and what does the research say?” phases
- Phases 3 & 4 are the “What do we do about it?” phases
- Today, we will only focus on Phases 1 & 2

The Community Assessment



Community Assessment: Overview

Evaluates Greater Dalton as a place to live, work, and do business

Our challenge:

Identify **important themes** from **previous research**, **qualitative input**, and **quantitative data**

Put the community's opportunities and challenges into **context**

Clearly identify **key takeaways** that can inform strategy creation – this is about **moving forward**

Community Assessment: Overview

Previous Research and Ongoing Initiatives

- Examined relevant findings from previous reports and plans:
 - Archway process
 - Grow Greater Dalton
 - etc.
- Goal is to build on the work that has already been done
- We know that implementation will be critical

Community Assessment: Overview

Qualitative Input

- Approximately 20 in-person and phone interviews
- Online survey with 2,220 total responses
 - Relative to community size, one of the best response rates ever

Community Assessment: Overview

Quantitative Research

- Research focusing on demographic, socioeconomic, economic, and quality of life indicators
- Whitfield County was primary research geography
 - aka “Greater Dalton” unless otherwise specified
- Data presented in five **Scorecards** with additional data and analysis in report text

Scorecards

Benchmark performance against nine counties in the Southeast

1. Morgan, AL (Decatur)
2. Bartow, GA (Cartersville)
3. Floyd, GA (Rome)
4. Hall, GA (Gainesville)
5. Lee, MS (Tupelo)
6. Catawba, NC (Hickory)
7. Davidson, NC (Lexington)
8. Randolph, NC (Asheboro)
9. Bradley, TN (Cleveland)

	Whitfield, GA	Morgan, AL	Bartow, GA	Floyd, GA	Hall, GA	Lee, MS	Catawba, NC	Davidson, NC	Randolph, NC	Bradley, TN
1 Yr. Employment Change (2015-2016)	2.5%	0.6%	3.7%	1.5%	4.6%	1.3%	1.5%	1.9%	1.7%	4.3%
Rank	4	10	3	7	1	9	8	5	6	2
5 Yr. Employment Change (2011-2016)	5.2%	2.1%	11.8%	5.7%	16.7%	6.7%	7.1%	8.0%	1.0%	23.2%
Rank	8	9	3	7	2	6	5	4	10	1
5 Yr. MFG Employment Change (2011-2016)	7.2%	7.7%	24.6%	11.2%	25.4%	1.5%	6.8%	11.5%	9.9%	24.3%
Rank	8	7	2	5	1	10	9	4	6	3
5 Yr. Logistics Employment Change (2011-2016)	-3.6%	-2.3%	7.8%	37.8%	7.4%	1.4%	17.3%	22.1%	-4.2%	10.8%
Rank	9	8	5	1	6	7	3	2	10	4
5 Yr. Professional Services Emp. Change (2011-2016)*	-3.1%	26.1%	-3.7%	-2.1%	48.2%	-14.1%	19.2%	54.7%	16.1%	12.1%
Rank	8	3	9	7	2	10	4	1	5	6
5 Yr. Healthcare Emp. Change (2011-2016)	23.4%	2.0%	-3.3%	7.7%	28.8%	9.0%	3.3%	-11.6%	2.0%	6.2%
Rank	2	8	9	4	1	3	6	10	7	5
5 Yr. Tourism Emp. Change (2011-2016)	13.7%	16.9%	21.2%	11.8%	42.1%	16.4%	7.5%	7.2%	5.4%	43.2%
Rank	6	4	3	7	2	5	8	9	10	1
5 Yr. Government Emp. Change (2011-2016)	0.8%	-5.5%	-5.5%	-12.6%	1.2%	-1.2%	-3.1%	-2.9%	-8.4%	7.2%
Rank	3	7	8	10	2	4	6	5	9	1
Average Annual Wage (2016)	\$40,135	\$40,339	\$40,185	\$37,527	\$42,281	\$36,280	\$38,657	\$34,775	\$33,036	\$36,820
Rank	4	2	3	6	1	8	5	9	10	7
5 Yr. Average Annual Wage (2011-2016)	12.4%	8.3%	13.2%	6.1%	10.7%	5.2%	9.8%	14.3%	9.7%	2.8%
Rank	3	7	2	8	4	9	5	1	6	10
Per Capita Income (PCI) (2014)	\$32,435	\$35,188	\$33,483	\$33,705	\$35,491	\$35,429	\$36,742	\$34,650	\$31,896	\$39,715
Rank	9	5	8	7	3	4	2	6	10	1
5 Yr. PCI Change (2009-2014)	16.3%	11.2%	15.2%	13.7%	13.9%	13.5%	13.0%	12.5%	13.1%	23.8%
Rank	2	10	3	5	4	6	8	9	7	1

Report Structure

Five sections:

Economic Performance

Workforce Dynamics

Innovation and Entrepreneurship

Business Climate

Quality of Life

Report Structure

Each section includes:

- Themes from Previous and Ongoing Initiatives
- Key Findings from Research and Input
 - Public Input denoted by **RED text**
- Scorecard data

Concludes with **Key Takeaways** that summarize the most important findings and themes

Key findings:

- Huge job losses during the Great Recession
- Strong recent growth
- Carpet and flooring account for 80% of manufacturing jobs
- Lack of economic diversity concerns stakeholders
- Health care has been a bright spot, but potential has limits
- “White collar” job losses are a concern

Key findings:

- Fourth-best wages among Scorecard communities
- But second-worst per capita income (standards of living)
- Lower labor force participation, more children
- **62% of \$40K+ jobs held by someone from another county**
- **Key input concern: talented people work here but don't always live here**

Key findings:

- Educational attainment ranks near the bottom
- Bottom 10 for AA and BA attainment among 596 counties with 100K+
- Population is growing, but topline figure is misleading
- **Greater Dalton is losing residents to other communities**
- **Average of 80 residents per year lost to Chattanooga**
- Workforce sustainability is threatened

Key findings:

- Given out-migration trend, “homegrown” talent will be key
- Parents and recent students had high praise for school systems
- But stakeholders expressed a desire to see achievement levels rise...
- ...and achievement gaps shrink
- Strong praise for new K-12 programs and GNTC
- Dalton State widely perceived as major strength and opportunity

Key findings:

- Innovation helped make Greater Dalton a world-renowned industry center
- But consensus is that this energy has diminished
- Many aspects of “ecosystem” rated poorly on survey (see pg. 22)
- Backed up by data measuring self-employment, new startups, etc.
- Stakeholders: holistic approach to helping entrepreneurs and small biz
- Promising opportunity: potential “innovation campus”

Key findings:

- #1 overall ranking on Scorecards
- GA's tax climate is favorable for many sectors
- Big advantage for tax-sensitive firms looking to be near Chattanooga
- Survey responses about biz climate mostly favorable (see pg. 29)
- **Overall, a strong business climate is good to have**
- **But it is not sufficient for economic success, and it doesn't help with talent**

Key findings:

- Survey: social offerings, aesthetics, and openness has room to improve
- Two-thirds of survey respondents said they are likely to remain...
- ...but fewer than one in four say their children will want to live here
- **Downtown development is a priority for stakeholders**
- **Housing is affordable but more quality options are desired**

Key findings:

- Economic development is ultimately about raising standards of living
- But many residents are not faring well
- 28 percent of children under 18 live below the poverty line
- Poverty rates are falling
- But childhood poverty can create a lifetime of challenges – major threat

The Importance of Quality of Place

Community attachment: what makes a community “sticky?”

1. Social offerings

- Such as entertainment venues and places to meet

2. Area’s aesthetics

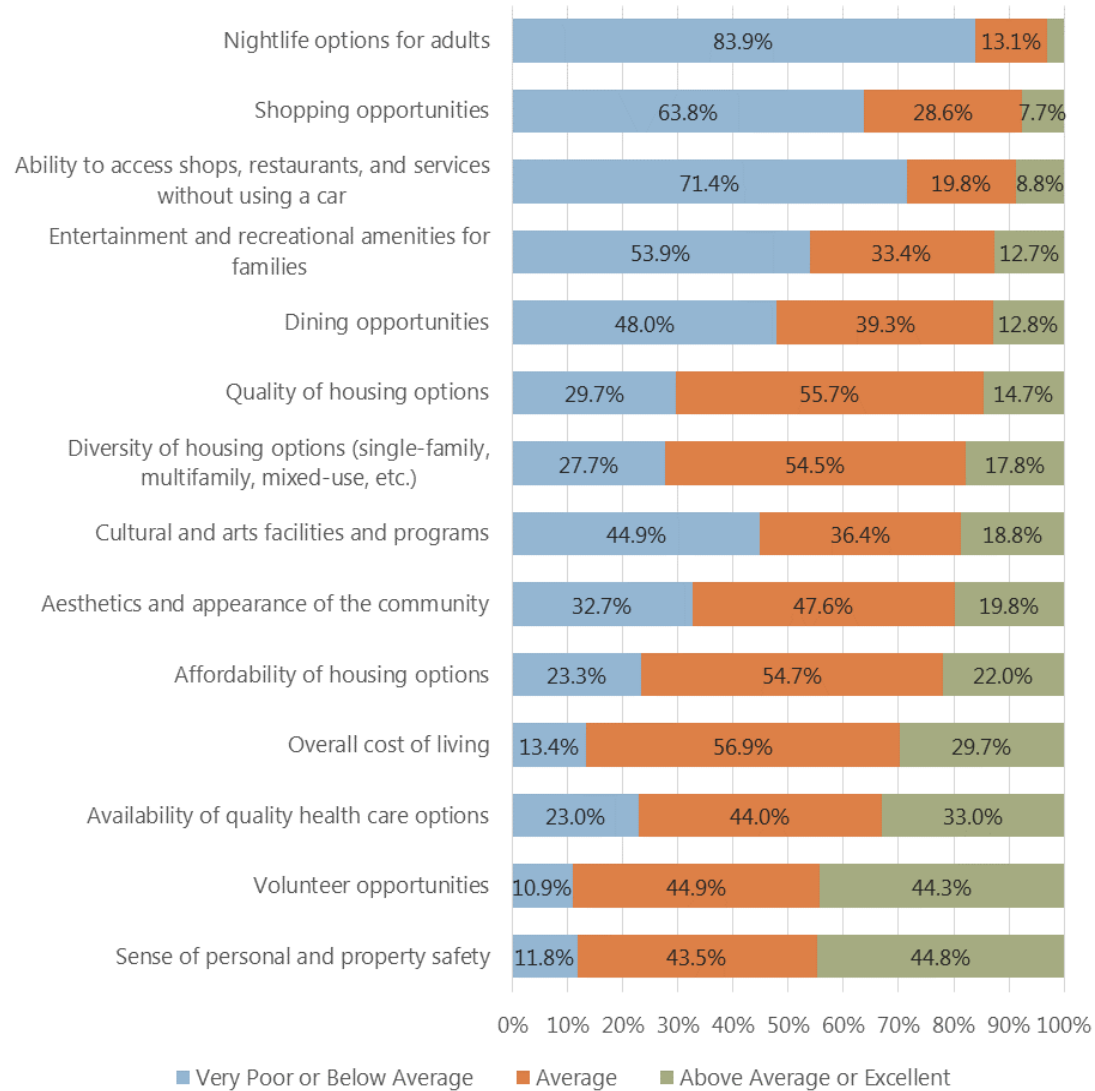
- Physical beauty and green spaces

3. Openness

- Building networks and quality of life options for all kinds of people

More than feel-good sentiments, places with high levels of attachment tend to be more economically successful.

Quality of Life



Key Takeaways



Key Takeaways and the Strategic Planning Process

- This process will result in a consensus strategy for Greater Dalton
- But first, we must identify the fundamental issues we will address
- Report contains dozens of data indicators...
- ...and many things we might change or improve
- But resources are limited
- And our recent experience tells us that we must have **FOCUS**
- Key takeaways attempt to identify core issues we can address

Key Takeaways

- Talent drain jeopardizes workforce, fiscal health, and vibrancy
- “Quality of place” and housing, especially in downtown, needed for talent
- Greater Dalton has a poor self image that hurts us with residents and outsiders alike
- Entrepreneurial ecosystem offers path to new business creation
- Very low educational attainment rates undermine competitiveness
- Child poverty threatens community success and individual outcomes
- Dalton State and innovative educational programs are key assets

So now what?

We use the key takeaways to help inform focus areas

Great, what *might* those be?

Halting the talent drain

A downtown play

Continue industrial diversification efforts

A greater community focus on educational outcomes

Entrepreneurism/Innovation

Thank You.

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