U.S. DEPARTMENT OF COMMERCE ECONOMIC DEVELOPMENT ADMINISTRATION

2016 Annual Performance Report
Comprehensive Economic Development Strategy (CEDS)
September 2016

Award Number: 04-83-06740
Grant Period: 01/01/2013 to 12/30/2017

SOUTHERN GEORGIA REGIONAL COMMISSION

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Introduction

The Southern Georgia Regional Commission's (SGRC) Comprehensive Economic Development Strategy (CEDS) was designed to bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen the regional economy. The SGRC CEDS analyzes the regional economy and serves as a guide for establishing regional goals and objectives, a regional plan of action, and the investment priorities and funding sources.

As a performance-based plan, this CEDS plays a critical role in adapting to global economic conditions by fully utilizing the region's unique advantages to maximize economic opportunity for its residents by attracting the private investment that creates jobs. The SGRC CEDS is a regionally-owned strategy that is the result of a continuing economic development planning process developed with regional public and private sector participation. The CEDS sets forth the goals and objectives necessary to solve the economic development problems of the Southern Georgia region and clearly defines the measures of success.

As recipient of EDA Planning Investment funds (Investment #04-83-06740), the SGRC serves as a designated Economic Development District (EDD). As the EDD and the developer of the CEDS, the SGRC is charged with the responsibility of submitting annual performance reports to the Economic Development Administration (EDA).

Executive Summary

The 2016 Annual CEDS Performance Report is provided to the Economic Development Administration (EDA) as the Performance Report for the Southern Georgia Regional Commission under EDA Investment Number 04-83-06740. The Report covers the activity period from October 1, 2015, through September 30, 2016. It is a compilation of all economic activities within the region, a report on the changing economic conditions within the region, and recommended adjustments to the CEDS based on those changing conditions.

The SGRC's planning district includes the eighteen county governments of Atkinson, Bacon, Ben Hill, Berrien, Brantley, Brooks, Charlton, Cook, Clinch, Coffee, Echols, Irwin, Lanier, Lowndes, Pierce, Tift, Turner, and Ware Counties and the 45 municipal governments within those counties.

The Southern Georgia Workforce Development Board (WDB) continues to serve as the CEDS Strategy Committee. This organizational structure has been in place since the inception of the CEDS planning process for the district. The Southern Georgia WIB is made up of a professionally diverse group of regional leaders, that view job creation, economic initiatives and incentives to assist business and industry, and workforce training and education as top needs or priorities in the region. For this reason, the CEDS Strategy Committee is invaluable for its input into the CEDS process.

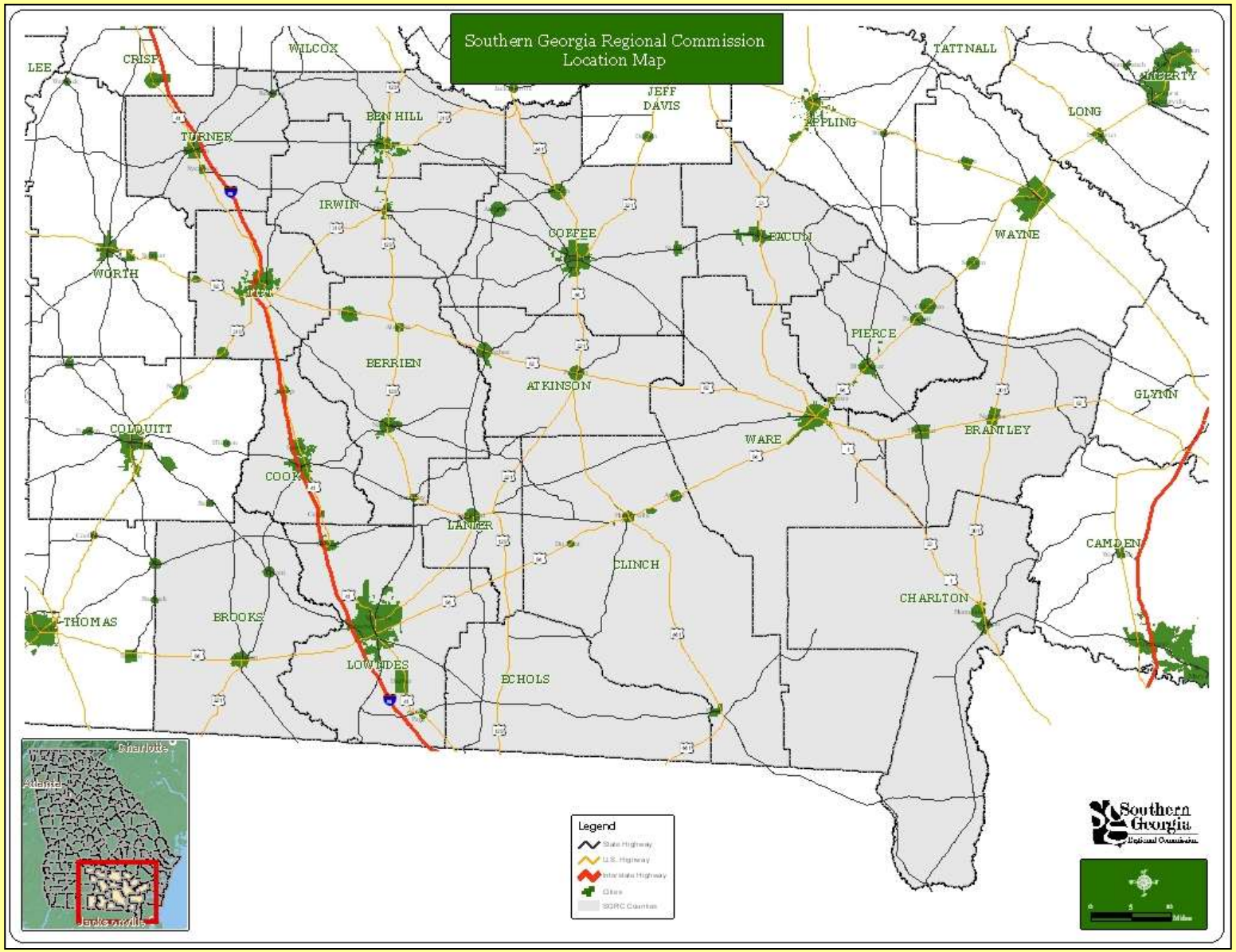
The 2016 Annual CEDS Performance Report provides organizational information on the staffing and divisions of the regional commission. It also identifies the members of the WIB, which, serving as the CEDS Strategy Committee, provides community and private sector participation in the CEDS effort. In addition, the Performance Report gives a State of the Region that briefly describes population, economy, labor, workforce development, education, economic clusters, resources, and regional changes. It also provides a list of achievable Goals and Objectives for the region, a Plan of Action to ensure success, and Performance Measures used to evaluate the Southern Georgia Regional Commission's successful implementation of the 2013-2017 CEDS.

Executive Summary

The SGRC's 2016 Annual CEDS Performance Report is a compilation of efforts by staff to inventory all economic development activities within the region, regardless of the source of funding, and report on changing economic conditions. Implementation of the goals identified in this plan is significant to the economic future of the SGRC District.

The final 2013-2017 CEDS, this Performance Report, and subsequent Performance Reports will be available on the Southern Georgia RC's website at www.sgrc.us. Making the CEDS and Performance Reports readily available to local government officials, the CEDS Strategy Committee, and the general public will allow and encourage input into the implementation of the plan and will assist in the attainment of the goals and objectives.

SGRC 18-County Region



SGRC Council

The SGRC is a multi-jurisdictional planning agency whose membership includes public officials, private individuals, post-secondary education representatives, workforce development representatives, economic development professionals, and other stakeholders throughout the region. The SGRC's planning district includes the eighteen county governments of Atkinson, Bacon, Ben Hill, Berrien, Brantley, Brooks, Charlton, Cook, Clinch, Coffee, Echols, Irwin, Lanier, Lowndes, Pierce, Tift, Turner, and Ware, and the 45 municipal governments within those counties.

The SGRC provides technical, planning, community and economic development assistance, and aging and workforce development services to the Southern Georgia region. The governing authority, or "Council," of the Regional Commission functions as the District Council in administering the District's EDA programs.

The membership of the SGRC Council includes representatives from all 18 counties as well as 17 of the 45 municipalities in the region. The membership includes:

- County Official - The chief elected official of each county's governing body;
- Municipal Official - Mayor of the county seat;
- Private Official - One private-sector official from each county representing any for-profit enterprise, management official, or executive holding a key decision making position (or designee);
- Three At-Large Appointments by the Governor of Georgia;
- One At-Large Appointment by the Lieutenant Governor of Georgia; and,
- One At-Large Appointment by the Speaker of the House.

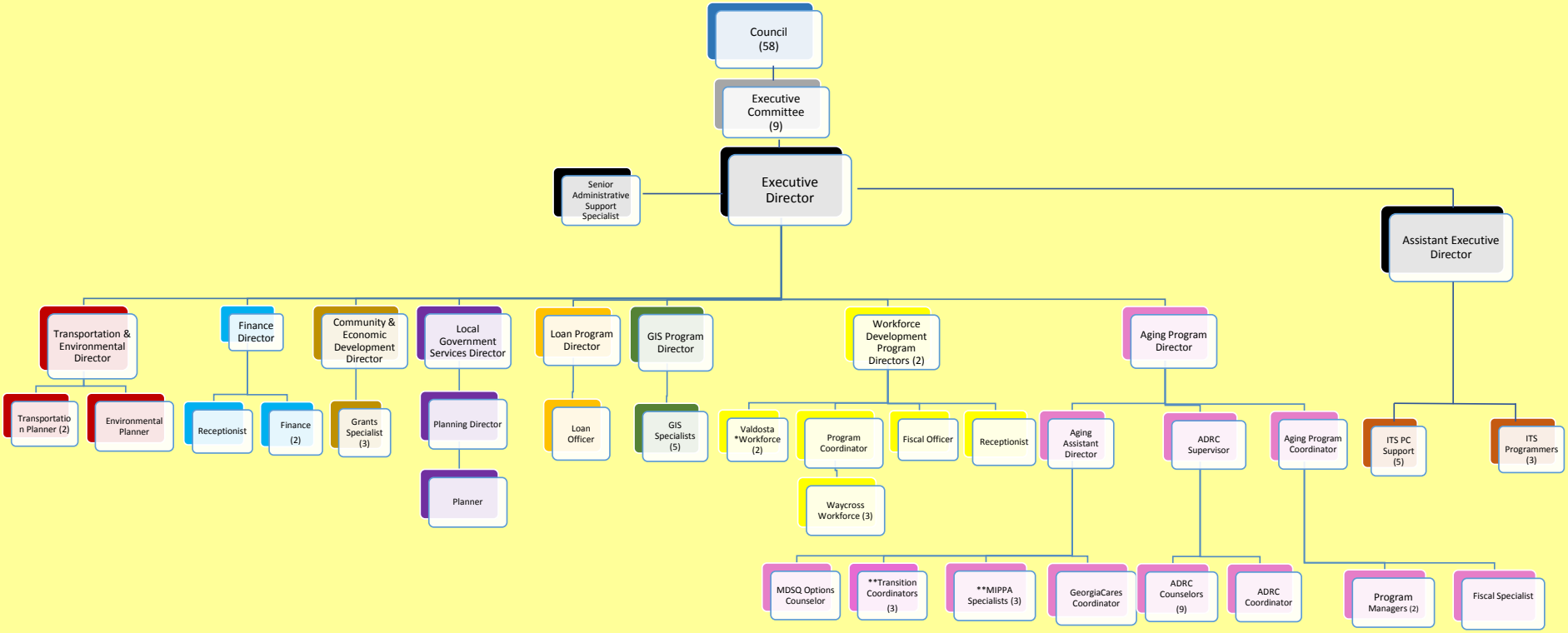
Currently the SGRC Council representation includes: 35 public officials (Echols County does not have a municipality), 17 private officials (Brooks County has a vacancy), and 2 At-Large officials (there are 3 vacancies). The Southern Georgia Regional Commission is in compliance with EDA and State of Georgia governing membership requirements.

SGRC Council

	County Representative	Municipal Representative	Private Sector Representative
Atkinson	Lace Futch	Bettye Drayton-Williams	Janice McKinnon
Bacon	Andy Hutto	Peggy Murphy	Lisa Coley
Ben Hill	Philip Jay	Mark Massee	Warren Manley
Berrien	Doc Sumner	Michael Richbourg	Janet Studstill
Brantley	Skipper Harris	Diane Morgan	Richard Thornton
Brooks	Myra Exum	James Brown	Vacant
Charlton	James Everett	Lee Gowen	Dawn Malin
Clinch	Roger Metts	Tom Kennedy	Willie Hardee, Jr.
Coffee	Oscar Paulk	Johnnie Lee Roper	Adam Smith
Cook	Michael Dinnerman	Buddy Duke	Jerry Connell
Echols	Jim Carter	Vacant	Lori Tenery
Irwin	Joey Whitley	Matt Seale	Mona Paulk
Lanier	Dennis Fender	Bill Darsey	Sandy Sanders
Lowndes	Joyce Evans	Vivian Miller-Cody	Anthony Payton
Pierce	Neal Bennett	Mary Lott Walker	Andy Brannen
Tift	Grady Thompson	Julie Smith	Brian Marlowe
Turner	Brad Calhoun	John Burgess	Stevi Thompson
Ware	Carlos Nelson	John Knox	Barbara King
Governor's Office	Gary Strickland	**Lt. Governor's Office**	Keith Stone
	Vacant		
	Vacant	**Speaker's Office**	Vacant

SGRC Staff

The SGRC has two office locations, Valdosta and Waycross. A professional staff of sixty-eight (68) serves the region in IT and GIS Services, Community and Economic Development, Transportation and Transportation Access, Workforce Development, and Aging Services. Lisa Cribb serves as the Executive Director.



As of September 2016

CEDS Strategy Committee

The Southern Georgia WDB membership of public and private sector individuals represents governments, business and industry, higher education, organized labor, housing authorities, and other community based organizations. The utilization of input and ideas from this diverse group of public officials and private sector representatives ensures the inclusiveness of all demographic segments of the region in the CEDS planning and implementation process.

Southern Georgia Workforce Development Board		
Jo Wingate, Chair – Private Sector	Gary Strickland, Vice Chair – Private Sector	Dr. Tina Anderson – Education & Training Sector
Dr. Pete Snell – Education & Training Sector	Lowell Williamson – Education & Training Sector	Janet Studstill – Private Sector
Eddie Bennett – Private Sector	Timmy Baxley – Workforce Sector	Andy Brannen – Private Sector
Darlene Tait – Private Sector	Keith Bryant – Private Sector	Emily Castleberry – Private Sector
Donnie Chaney – Private Sector	Myrna Ballard – Private Sector	Frank Bannamon – Private Sector
James Johnson – Workforce Sector	Carmen Wilkinson – Workforce Sector	Jim Glass – Education & Training Sector
Grady Burrell – Workforce Sector	Melvin Johnson – Workforce Sector	Jamon Williams – Government & Economic Development Sector
Kleve Mathie – Private Sector	Larry Peacock – Workforce Sector	Jennifer Rowland – Private Sector
Michelle Shaw – Government & Economic Development Sector	J.D. Hickox – Government & Economic Development Sector	Renee Giedl – Government & Economic Development Sector
Phil Liles – Private Sector	Tommy Guthrie – Private Sector	John W. Mooney – Private Sector

SECTION I

THE STATE OF THE REGION

The Southern Georgia Regional Commission (SGRC) is an economic development planning district located in southern Georgia. The vast region covers South Central to Southeast Georgia. Agriculture, commercial timber production, and other rural development initiatives are all cornerstones of the Southern Georgia economy. However, the evidence of manufacturing is seen throughout the region and has helped to raise the per capita income, jobs creation and retention, and capital investments in some areas of the region. Valdosta, the major city and county seat of Lowndes, County, is the only designated Metropolitan Statistical Area (MSA) located in the District. The counties of Lowndes, Brooks, Echols, and Lanier are associated with the MSA. Valdosta has a growing manufacturing, warehouse, and distribution base. It is also home to Moody Air-force Base and Valdosta State University. The City of Douglas (including Coffee County), the City of Fitzgerald (including Ben Hill County), the City of Tifton (including Tift County), and the City of Waycross (including Pierce and Ware Counties) are defined as Micropolitan Statistical Areas. Micropolitan cities do not have the economic or political importance of large cities, but are nevertheless significant centers of population and production, drawing workers and shoppers from a wide local area. One county, Brantley, is associated with the Brunswick MSA, located outside the SGRC District. The District has three additional retail trade centers other than Valdosta, including Tifton, Douglas, and Waycross. Southern Georgia has several four-lane transportation arteries and is connected directly to one interstate highway system (I-75) on the western side of the region.

The economies of the SGRC region have become more diversified over the past twenty years; however, this diversity did not make the region immune to the national recession. The District has suffered from the ill-effects of numerous industry and business closures that occurred during the recession and resulted in economic distress and persistent unemployment. The economic base for the south-central area of the region is generated from within the south-central area and from north-central Florida. The southeastern economic base is generated from within the southeast area, the Georgia coastal area, and northeast Florida.

Southern Georgia is finding ways to reverse negative trends and to move the region forward through regional initiatives aimed at fostering sustainable economic development. Goals for economic development are being integrated with land use and transportation goals and coordinated with the concerns related to natural resources, preservation of water quality, agriculture, and connectivity in the region.

Barriers to economic prosperity in Southern Georgia are numerous. One of many barriers continues to be the lack of adequate funding to fully serve the planning and economic development needs of this extremely large and distressed region. Planning grants, such as those offered by EDA, are essential for providing the tools necessary to assist the Southern Georgia region in realizing its fullest potential.

COUNTY FACTS

Atkinson County
Area: 338.1 square miles
Population (2015 est.): 8,398
County Seat: Pearson
Incorporated Communities:
Pearson, Willacoochee
Established: August 15, 1917

Bacon County
Area: 285 square miles
Population (2015 est.): 11,299
County Seat: Alma
Incorporated Communities:
Alma
Established: July 27, 1917

Ben Hill County
Area: 251.8 square miles
Population (2015 est.): 17,403
County Seat: Fitzgerald
Incorporated Communities:
Fitzgerald
Established: July 31, 1906

Berrien County
Area: 452.5 square miles
Population (2015 est.): 18,963
County Seat: Nashville
Incorporated Communities:
Nashville, Alapaha, Enigma, Ray City
Established: February 25, 1856

Brantley County
Area: 444.4 square miles
Population (2015 est.): 18,455
County Seat: Nahunta
Incorporated Communities:
Nahunta, Hoboken
Established: August 14, 1920

Brooks County
Area: 493.7 square miles
Population (2015 est.): 15,658
County Seat: Quitman
Incorporated Communities:
Quitman, Barwick, Morven, Pavo
Established: December 11, 1858

Charlton County
Area:780.8 square miles
Population (2015 est.): 12,965
County Seat: Folkston
Incorporated Communities:
Folkston, Homeland
Established: February 18, 1854

Clinch County
Area: 809.4 square miles
Population (2015 est.): 6,893
County Seat: Homerville
Incorporated Communities:
Homerville, Argyle, Dupont, Fargo
Established: February 14, 1850

Coffee County
Area: 602.4 square miles
Population (2015 est.): 43,108
County Seat: Douglas
Incorporated Communities:
Douglas, Ambrose, Broxton, Nicholls
Established: February 9, 1854

Cook County
Area: 299.1 square miles
Population (2015 est.): 17,124
County Seat: Adel
Incorporated Communities:
Adel, Cecil, Lenox, Sparks
Established: July 30, 1918

Echols County
Area: 404.2 square miles
Population (2015 est.): 4,040
County Seat: Statenville
Incorporated Communities:
None
Established: Dec. 13, 1858

Irwin County
Area: 356.8 square miles
Population (2015 est.): 9,245
County Seat: Ocilla
Incorporated Communities:
Ocilla
Established: December 15, 1818

COUNTY FACTS

Lanier County
Area: 186.8 square miles
Population (2015 est.): 10,312
County Seat: Lakeland
Incorporated Communities: Lakeland
Established: August 7, 1920

Lowndes County
Area: 504.3 square miles
Population (2015 est.): 112,865
County Seat: Valdosta
Incorporated Communities: Valdosta, Dasher, Hahira, Lake Park, Remerton
Established: Dec. 23, 1825

Pierce County
Area: 343 square miles
Population (2015 est.): 19,103
County Seat: Blackshear
Incorporated Communities: Blackshear, Offerman, Patterson
Established: December 18, 1857

Tift County
Area: 265.1square miles
Population (2015 est.): 40,118
County Seat: Tifton
Incorporated Communities: Tifton, Omega, Ty Ty
Established: August 17, 1905

Turner County
Area: 286.1 square miles
Population (2015 est.): 8,214
County Seat: Ashburn
Incorporated Communities: Ashburn, Rebecca, Sycamore
Established: August 18, 1905

Ware County
Area: 902.6 square miles
Population (2015 est.): 35,370
County Seat: Waycross
Incorporated Communities: Waycross
Established: December 15, 1824

Regional SWOT

The Southern Georgia Regional Commission (SGRC) conducted a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis in order to develop a full awareness of all the factors in the region, both positive and negative, that are affecting economic development, and to ensure that the goals, objectives, and implementation strategies in the CEDS are still in line with the needs of the region. The CEDS Strategy Committee and the region's Economic Development Professionals (ED Pros) participated in the SWOT. The numerous responses to the SWOT were prioritized by the participants and the following strengths, weaknesses, opportunities, and threats received the highest ranking:

STRENGTHS
Ample water supply
Available land for development/area is not land-locked and has diverse topography
Documented loyal workforce
Workforce development helping people to become more employable
Transportation infrastructure/mobility - wide roads, low traffic
Higher education options (i.e. VSU, ABAC, Wiregrass, etc.)
Existing manufacturing industries
Timber and agriculture industry
Proximity to I-75, I-95, I-10, Georgia & Northern Florida ports, and major markets
Technical college system's willingness to work with local high schools to prepare students for the workforce
CSX/Norfolk Southern/GA-FL RailNet rail system
Five (5) Georgia Ready for Accelerated Development (GRAD) industrial sites in region
Energy availability and cost
Available raw product for further processing and applications in agriculture
Mild climate

WEAKNESSES
Untrained workforce/lack of soft skills
Negative perception of area - lack of abundance/potential/opportunity - cause site selectors to not consider Southern Georgia
Underdeveloped industrial parks
Limited number of existing marketable buildings
Privately held industrial property owners reluctant to incentivize prospects
Limited funds for workforce and economic development
Inadequate local funding/support for education - struggling school systems
Declining tax base in some counties
Lack of understanding of community's economic developer role/general public's lack of knowledge about economic development
Lack of new emerging leadership
Limited local government budgets
Narrow vision of some leaders
Low high school graduation rates
Older workforce not trained or up-to-date on latest technology
Needed road and other infrastructure improvements
Unreliable internet service/slow download & upload speeds
Lack of high school job training programs for specific jobs (i.e. welders, diesel mechanics, forestry workers)
Lack of available housing
Wetlands

OPPORTUNITIES
Local incentive plan approved by all local governments
Pursuit of grant funds for economic development projects
Asset development - create a list of all region assets and then begin developing by matching needs with local, regional, state, and federal funding.
Technology - ability to work from anywhere
Collaboration - working together across county lines - regionalism
Tourism
Support existing industries
Development of apprenticeship programs for high school students through technical colleges
New opportunities to develop music, film, and tourism industries
Availability of grant monies to encourage industrial and small business growth and to construct infrastructure
Workforce development/find new ways to grow workforce and recruit human capital/improve soft skills & work ethic
Entrepreneurship
Marketing of industrial sites/parks
Downtown revitalization efforts
Partnership with SGRC to pursue economic development grants/loans
Regional agri- & ecotourism
Regional technical college system
Value-added industrial development in agriculture
Career academies throughout the region
Vocational training for higher wage sectors
Increase high school graduation rate

THREATS
Loss of population
Loss of tax revenue
Graduation rates/school ratings
Closure or relocation of existing industries/businesses
Cuts in state funding for education
Rising cost of health care/threats to rural healthcare
Poor city/county relationships
Ignoring community weaknesses
Not maintaining existing strengths (transportation system, environment, etc.)
Unskilled labor
Dependency on government programs decreasing willingness to seek employment
Economic slowdown
Declining population
Non-diversified economic base
Workforce lacking critical workplace competencies (soft skills)
Out-migration of college graduates
High poverty rates
Uncertain national/global economy
Vanishing workforce - Boomers leaving w/ skills and strong work ethics; not enough numbers in next generation to fill the employment gaps

A. ECONOMY

Income & Employment Characteristics 2010 Census 2010-2014 ACS 5-year est.; GDOL August 2016

County	Median Household Income $	Median Family Income $	Per Capita Income $	Individuals Below Poverty Level	%	Labor Force	Unemployment Rate %
Atkinson	30,403	37,250	16,228	2,481	29.9	4,043	4.6
Bacon	37,698	48,700	18,109	2,284	20.4	5,046	5.1
Ben Hill	30,643	36,760	15,497	6,352	36.2	5,320	8.3
Berrien	31,812	42,191	16,660	4,830	25.3	7,038	6.1
Brantley	36,301	43,494	16,774	3,859	20.9	7,136	6.6
Brooks	31,686	42,991	19,473	4,383	27.8	6,808	4.9
Charlton	41,059	53,103	17,586	2,358	18.0	4,925	5.7
Clinch	29,125	42,500	18,256	2,345	34.6	2,806	6.0
Coffee	34,523	42,054	16,796	11,166	26.0	18,175	5.5
Cook	34,230	42,500	18,858	4,282	25.1	7,394	5.3
Echols	32,667	45,615	17,350	1,209	30.1	1,877	4.5
Irwin	36,729	47,385	18,614	2,114	22.3	3,164	7.3
Lanier	36,904	49,518	16,860	3,169	30.6	3,811	5.3
Lowndes	37,248	48,425	19,353	28,555	25.3	51,100	5.2
Pierce	41,685	49,677	21,601	3,772	20.0	8,435	5.3
Tift	34,830	46,725	19,560	11,280	27.7	19,014	5.4
Turner	29,763	35,376	17,215	2,106	24.8	3,236	6.2
Ware	35,247	43,653	18,341	9,410	26.2	15,331	5.4

Income

Regional Income Figures:

- Average median household income = $34,586
- Average median family income = $44,329
- Per Capita Income average =$17,952
- Pierce County has highest median household income at $41,685
- Clinch County has the lowest median household income at $29,125

Regional Poverty Figures:

- Average poverty rate = 26.2%
- Highest poverty rate = Ben Hill County, 36.1%
- Lowest poverty rate = Charlton County, 18.0%
- Seventeen of the Region's eighteen counties are considered to be areas of persistent poverty (20% or more of a county's population lives in poverty). The one county that falls below the threshold is Charlton Counties which has an 18.0% poverty rates.
- Region wide, 105,955 people live below the poverty level

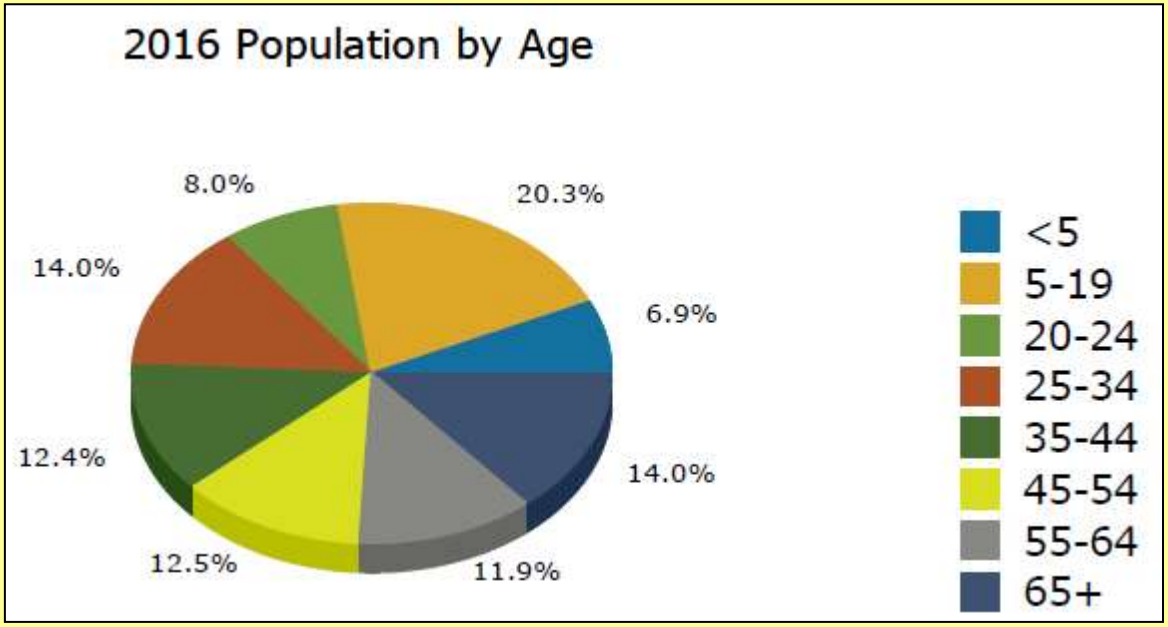
Regional Unemployment Figures (August 2016):

- Average unemployment rate = 5.7% (A 1.6% decrease from July 2015)
- Highest unemployment rate = Ben Hill County, 8.3%
- Lowest unemployment rate = Echols County, 4.5%

Source: 2010 Census 2010-2014 ACS 5-year est.; GDOL August 2016

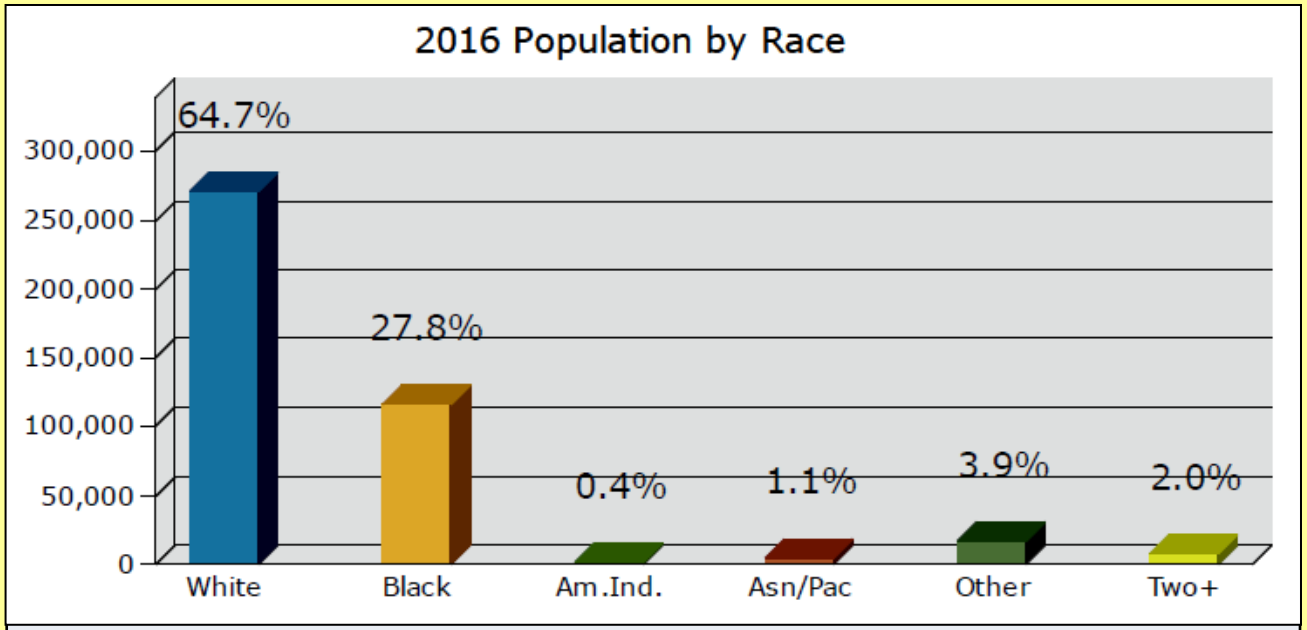
B. POPULATION

Region Population	
2000 Population	364,925
2010 Population	406,583
2016 Population	419,013
2021 Population	425,271
2000-2010 Annual Rate	1.09%
2010-2016 Annual Rate	0.48%
2016-2021 Annual Rate	0.30%
2016 Male Population	49.7%
2016 Female Population	50.3%
2016 Median Age	35.6



Source: ESRI Executive Summary & Graphic Profile for Southern Georgia Region

Race and Ethnicity	
2016 White Alone	64.7%
2016 Black Alone	27.8%
2016 American Indian/Alaska Native Alone	0.4%
2016 Asian Alone	1.1%
2016 Pacific Islander Alone	0.1%
2016 Other Race	3.9%
2016 Two or More Races	2.0%
2016 Hispanic Origin (Any Race)	7.2%



2016 Percent Hispanic Origin: 7.2%

Source: ESRI Executive Summary & Graphic Profile for Southern Georgia Region

POPULATION CHANGE 2000 - 2010

Atkinson County
2000 Census: 7,609
2010 Census: 8,375

Bacon County
2000 Census: 10,103
2010 Census: 11,096

Ben Hill County
2000 Census: 17,484
2010 Census: 17,634

Berrien County
2000 Census: 16,235
2010 Census: 19,286

Brantley County
2000 Census: 14,629
2010 Census: 18,411

Brooks County
2000 Census: 16,450
2010 Census: 16,243

Charlton County
2000 Census: 10,282
2010 Census: 12,171

Clinch County
2000 Census: 6,878
2010 Census: 6,798

Coffee County
2000 Census: 37,413
2010 Census: 42,356

Cook County
2000 Census: 15,771
2010 Census: 17,212

Echols County
2000 Census: 3,754
2010 Census: 4,034

Irwin County
2000 Census: 9,931
2010 Census: 9,538

Lanier County
2000 Census: 7,241
2010 Census: 10,078

Lowndes County
2000 Census: 92,115
2010 Census: 109,233

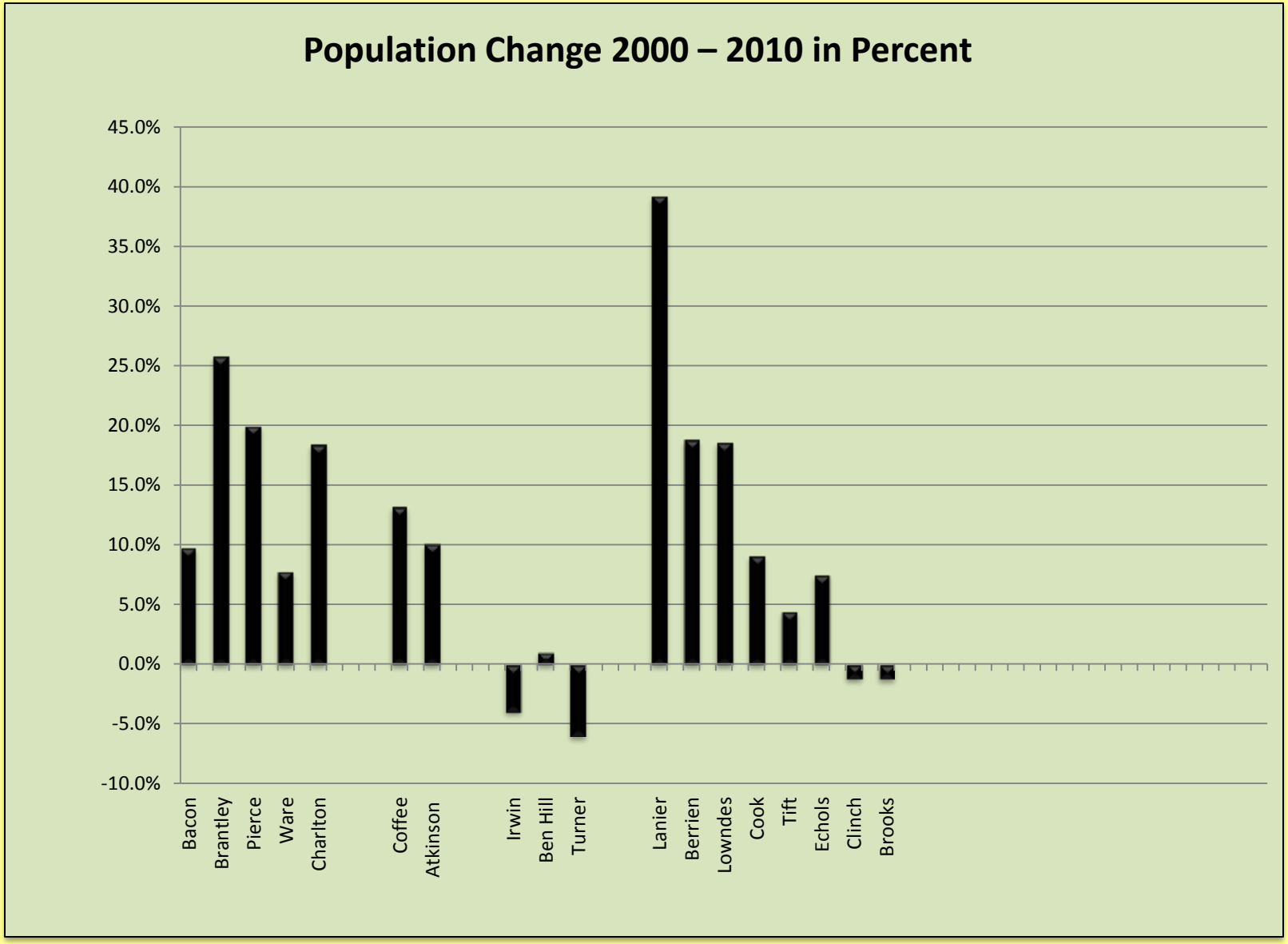
Pierce County
2000 Census: 15,636
2010 Census: 18,758

Tift County
2000 Census: 38,407
2010 Census: 40,118

Turner County
2000 Census: 9,504
2010 Census: 8,930

Ware County
2000 Census: 35,483
2010 Census: 36,312

Source: U.S. Census Bureau



Source: U.S. Census Bureau

Population

- Growth centers within the region account for much of the population increases. Lanier County had the largest percentage increase in population (7,241 in 2000 to 10,078 in 2010) of 39.2% percent, due primarily to its proximity to Moody Air Force Base (MAFB), lower property values and taxes and a good school system. The military base and the nearby growth in the north-east portions of Valdosta also contributed to population increases in Lowndes and Berrien County.

- The growth along the coastal counties to the east and influx from Florida, particularly the Jacksonville metropolitan area, drove the population increases in the eastern portions of the region. For example, the second largest population increase of 25.9% occurred in Brantley County from 14,629 in 2000 to 18,411 in 2010. Large population increases also occurred in Pierce and Charlton County due to these nearby growth centers.

- Four of the eighteen counties in the region experienced a loss in population between 2000 and 2010. Turner County experienced the highest loss with 6%, followed by Irwin County with a 4% population decrease. In addition, Clinch and Brooks Counties had a 1% population decline. The loss in population is due in part to the lack of job growth. Lack of job opportunities fails to attract new residents to these counties. Lack of jobs especially for those between 18 and 24 years have forced this population group to move outside those counties to work and live.

C. WORKFORCE DEVELOPMENT & EDUCATION

Workforce Development through education and training is a critical need for economic development in Southern Georgia. Statistics show that a high poverty, low diversity region can turn away both potential employers and a potential workforce. Low literacy and educational attainment can cripple attempts at industry diversification towards high skill/high wage job growth. If higher paying industries are to be recruited to the region, then higher skilled employees must be trained and made available. Education and training are recognized as critical needs. Fortunately, there are a number of regionally significant programs available that are making a difference in the lives of many uneducated and/or untrained worker in the region. They are:

- Workforce Innovation and Opportunity Act (WIOA) Training and Education Programs & Southern Georgia Workforce Development Boards

- Technical Colleges
    - Wiregrass Georgia Technical College (Adel, Douglas , Fitzgerald, Nashville, and Valdosta)
    - Southern Georgia Technical College (Satellite campus in Tifton)
    - Coastal Pines Technical College (Waycross and Alma)

- Two and Four-Year Colleges and University
    - Georgia Military College, Webster University, Park University, and Embry Riddle Aeronautical University (Satellite Campuses in Valdosta)
    - South Georgia State College, Douglas & Waycross
    - Abraham Baldwin Agricultural College, Tifton
    - Troy University, Tifton satellite campus
    - University of Georgia, Tifton satellite campus
    - Valdosta State University

Educational Attainment of Workforce 25 years & older 2010 Census 2010-2014 ACS 5-year est.

County	Less than 9th Grade	9th to 12th grade, no diploma	High School Graduate, GED or equivalent	Some College, no degree	Associate's Degree	Bachelor's Degree	Graduate or professional Degree	Total
Atkinson	922	782	2,026	782	269	264	135	5,180
Bacon	686	1,197	2,920	1,182	431	540	343	7,299
Ben Hill	756	1,657	4,395	2,355	890	845	372	11,270
Berrien	715	1,929	4,640	2,338	1,494	1,022	638	12,776
Brantley	680	2,100	5,378	2,489	655	449	389	12,140
Brooks	636	1,833	3,989	2,469	657	862	334	10,780
Charlton	752	1,486	3,743	1,688	468	633	404	9,174
Clinch	420	704	1,784	739	155	345	280	4,427
Coffee	1,954	4,281	10,769	4,878	1,927	2,117	1,221	27,147
Cook	773	2,022	4,159	2,090	665	885	616	11,210
Echols	393	283	1,000	512	130	133	55	2,506
Irwin	267	932	2,566	1,506	548	274	428	6,521
Lanier	638	843	1,995	1,682	732	470	356	6,716
Lowndes	3,009	7,362	18,820	15,043	5,057	9,218	5,505	64,014
Pierce	915	1,608	4,972	2,609	692	841	730	12,367
Tift	2,055	3,399	8,219	5,226	2,258	2,080	2,131	25,368
Turner	578	872	2,111	912	511	300	272	5,556
Ware	1,340	3,112	9,910	4,979	1,460	1,771	1,364	23,936

Education of the Labor Force SGRC Region 2010 Census 2009-2013 ACS 5-year est.

	Total	18-24	%	25 – 34	%	35-44	%	45-64	%	65+	%
Less than 9th Grade	18,866	1,382	7.3	1,856	9.8	2,852	15.1	5,552	29.5	7,224	38.3
9th to 12th Grade no diploma	45,529	9,129	20.1	7,335	16.1	6,513	14.2	13,582	30.0	8,970	19.6
High School Graduate, GED or equivalent	109,298	15,906	14.5	17,632	16.1	16,898	15.5	39,266	35.9	19,596	18.0
Some College, no degree	72,930	19,470	26.7	13,424	18.4	12,099	16.6	19,547	26.8	8,390	11.5
Assoc. degree	21,216	2,222	10.5	4,536	21.4	5,110	24.1	7,515	35.4	1,833	8.6
Bachelor's degree	25,021	1,971	7.9	6,046	24.1	5,089	20.3	8,172	32.7	3,743	15.0
Graduate or prof. degree	15,744	137	1.0	2,579	16.3	3,619	23.0	6,332	40.2	3,077	19.5

Education of the Labor Force

- The highest numbers for educational attainment in the region are for high school graduation, GED or equivalent for all age groups. Those numbers drop off drastically for post secondary education with a degree.
- As these numbers begin to decrease, however, a definite increase can be observed in the percentage of the 45-64 age group with a Bachelor's Degree or Graduate or Professional Degree. This seems to indicate that more people are going back to school later in life after rearing their families or retiring from work.
- A look at the educational attainment of the workforce by gender shows that males represent the vast majority of people without a high school diploma, possibly reflecting early recruitment into the workforce. Of those obtaining a high school diploma only, the number of males and females is fairly even. However, females represent a large majority of the population that obtains some college education and beyond. This supports the above referenced idea that more people are returning to school, particularly for post secondary educations, after rearing their families.

D. ECONOMIC CLUSTERS

Regional Cluster Analysis

The wide array of economic clusters in the 18-county Southern Georgia EDD region illustrates the diversity of the district's economy. In utilizing the U.S. Cluster Mapping website (http://clustermapping.us) to analyze the region's clusters, it was determined that there are 47 strongly traded clusters in Southern Georgia. A strong cluster is a cluster that has high employment specialization in a region (ranking in the top 25% of all regions by specialization and also meeting minimum criteria for employment and establishment).

Forestry is the most dominant regional cluster and is found in all but one of the region's counties. Wood Products and Agriculture are the second most dominate clusters with both being located in ten of the region's counties. The Textiles cluster plays a role in the economies of nine counties.

Of the region's 18 counties, the majority have numerous clusters making up their local economies. With 15, Coffee County leads the region in the total number of traded clusters. Lowndes County follows with 13 traded clusters. Three of the region's counties have a small number of traded clusters. Both Clinch and Echols Counties have only three traded clusters, and Lanier has four.

The following Cluster Portfolio pages illustrates the strongest traded clusters in each of the SGRC's counties. The number in each cluster circle represents the amount of people employed in that cluster.

Atkinson County

Source: http://clustermapping.us

Bacon County

11
Traded Clusters

- Agriculture — 60.0
- Distribution & eCommerce — 196
- Downstream Metals — 60.0
- Environmental Services — 10.0
- Forestry — 70.0
- Livestock — 185
- Medical Devices — 10.0
- Metalworking — 60.0
- Textiles — 175
- Transportation — 111
- Vulcanized Materials — 10.0

Source: http://clustermapping.us

Ben Hill County

Source: http://clustermapping.us

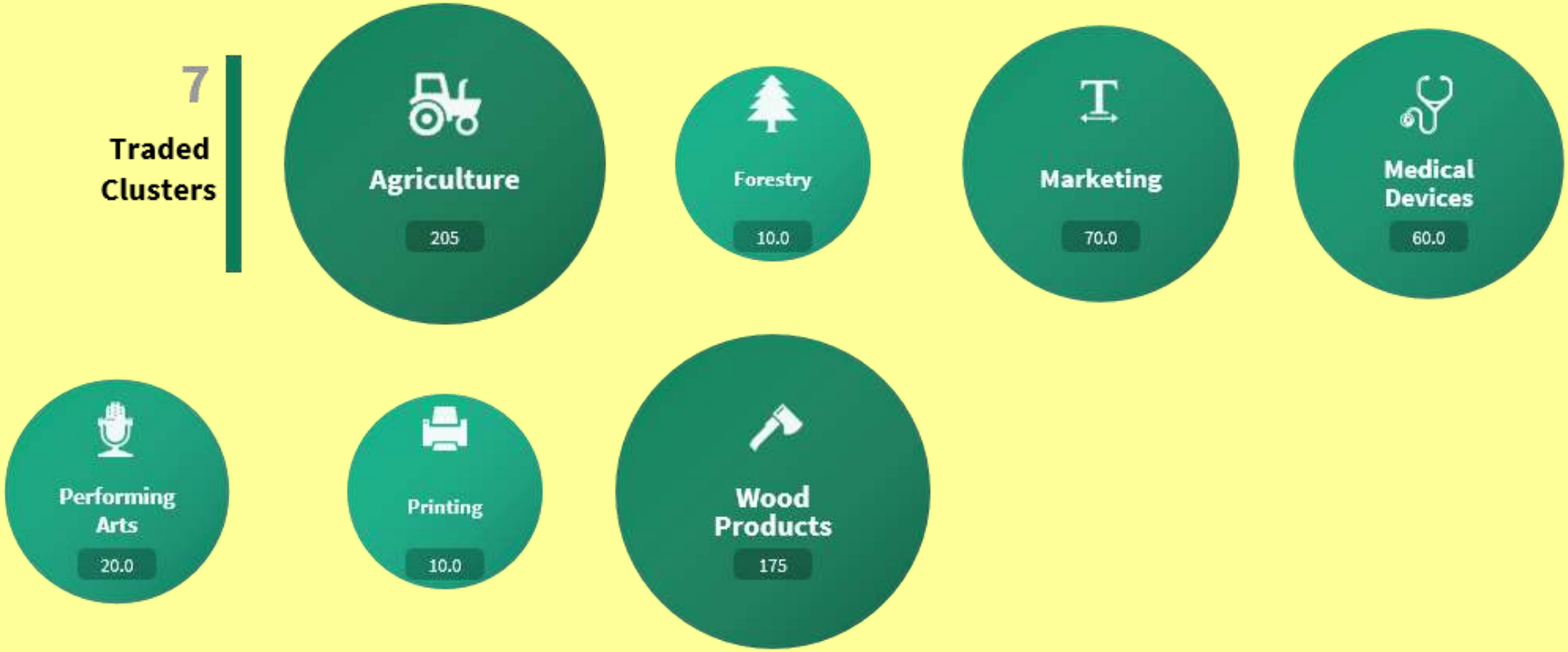
Berrien County

Source: http://clustermapping.us

Brantley County

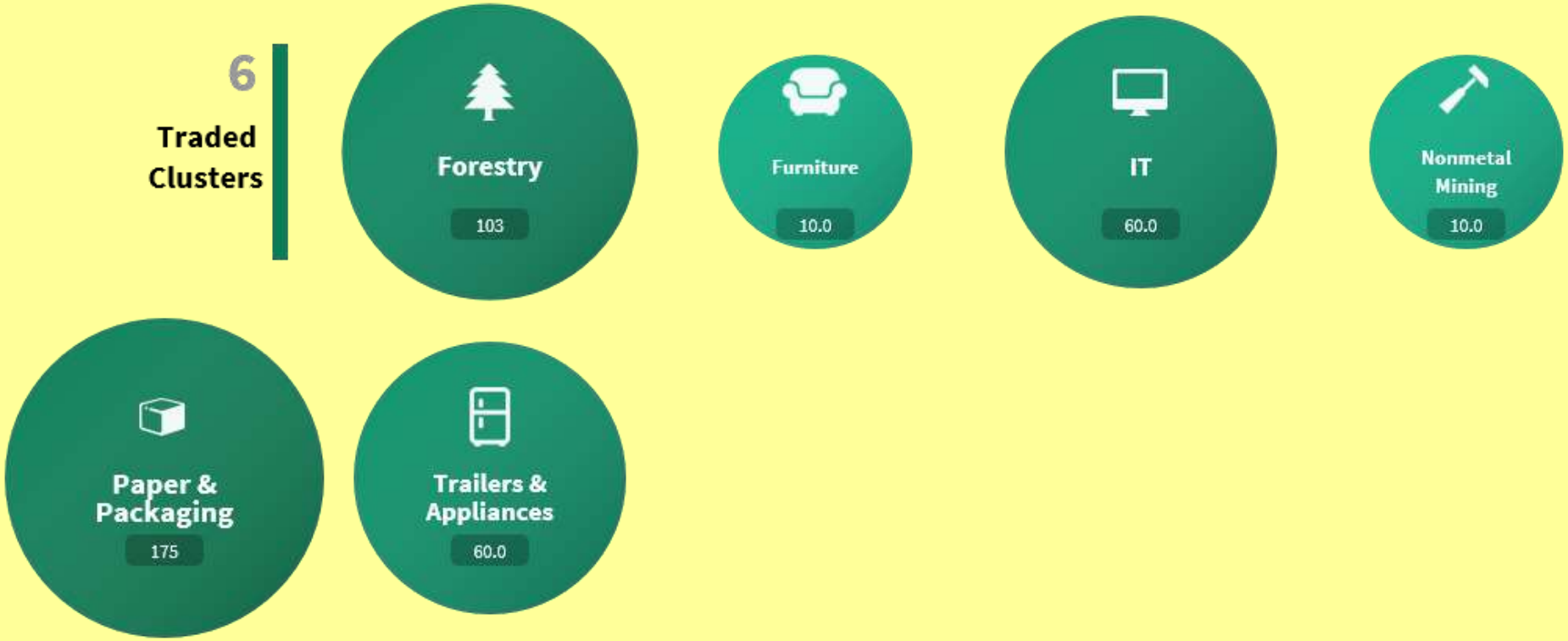
Source: http://clustermapping.us

Brooks County



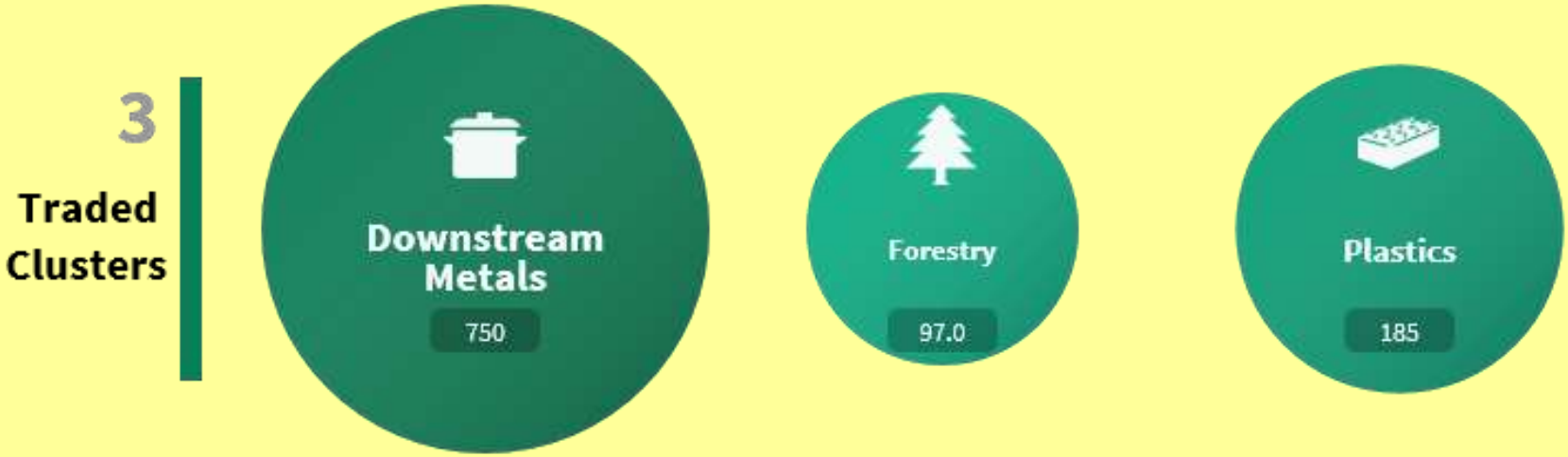
Source: http://clustermapping.us

Charlton County



Source: http://clustermapping.us

Clinch County



Source: http://clustermapping.us

Coffee County

15
Traded Clusters

- Aerospace & Defense — 375
- Agriculture — 80.0
- Distribution & eCommerce — 1.26k
- Downstream Metals — 235
- Forestry — 48.0
- Furniture — 175
- Lighting — 60.0
- Livestock — 750
- Paper & Packaging — 60.0
- Textiles — 185
- Tobacco — 10.0
- Trailers & Appliances — 175
- Transportation — 275
- Upstream Chemicals — 60.0
- Upstream Metals — 175

Source: http://clustermapping.us

Cook County

11
Traded Clusters

- Agriculture — 70.0
- Downstream Metals — 170
- Financial Services — 100
- Forestry — 10.0
- Hospitality — 175
- Metalworking — 70.0
- Plastics — 185
- Trailers & Appliances — 10.0
- Transportation — 87.0
- Vulcanized Materials — 20.0
- Wood Products — 140

Source: http://clustermapping.us

Echols County

3

Traded Clusters

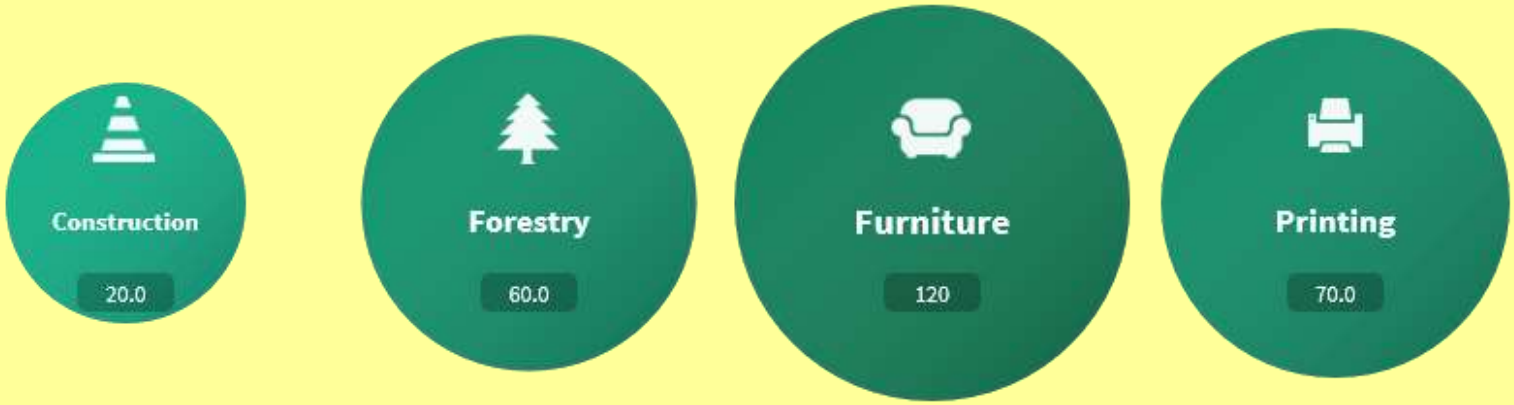
Source: http://clustermapping.us

Irwin County

Source: http://clustermapping.us

Lanier County

4
Traded Clusters



Source: http://clustermapping.us

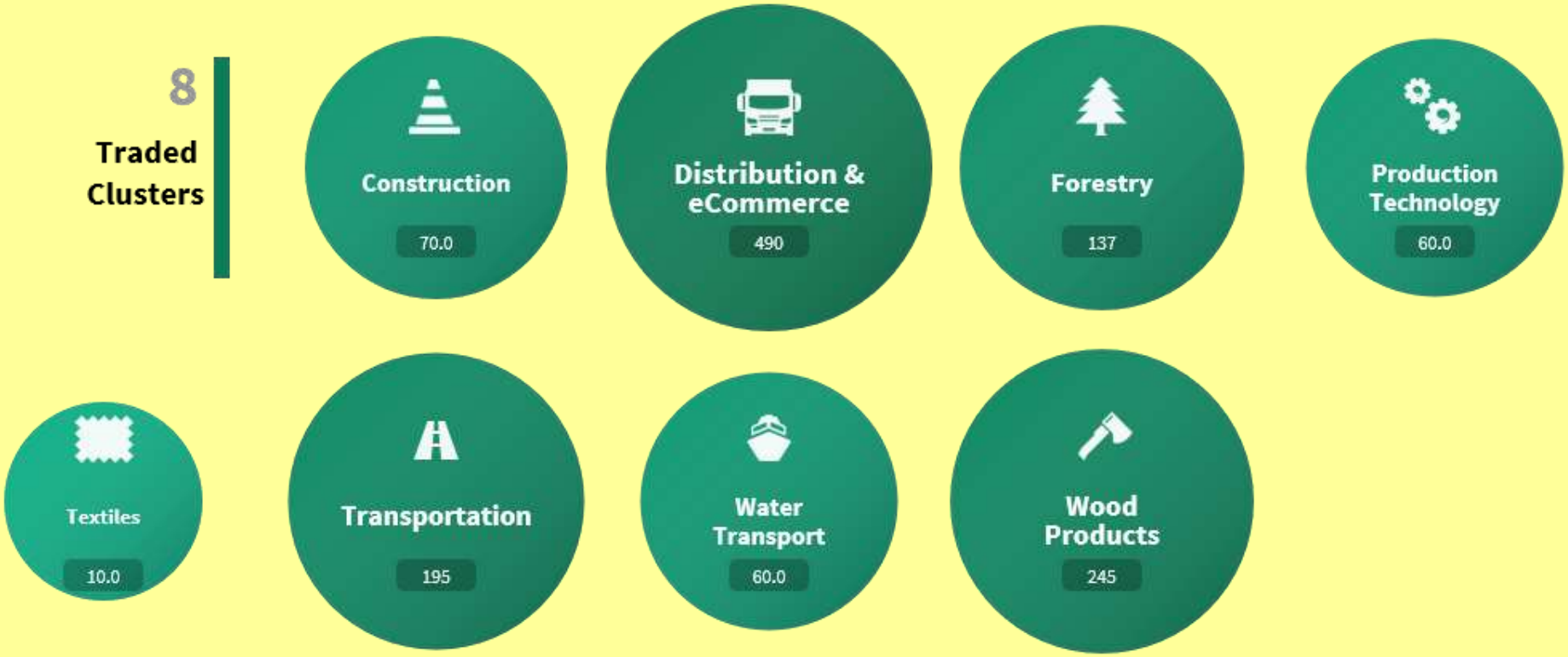
Lowndes County

13
Traded Clusters

- Communications — 130
- Distribution & eCommerce — 2.73k
- Food Processing — 690
- Forestry — 116
- Leather Products — 10.0
- Lighting — 175
- Livestock — 175
- Music — 10.0
- Paper & Packaging — 570
- Plastics — 480
- Textiles — 70.0
- Upstream Chemicals — 235
- Wood Products — 515

Source: http://clustermapping.us

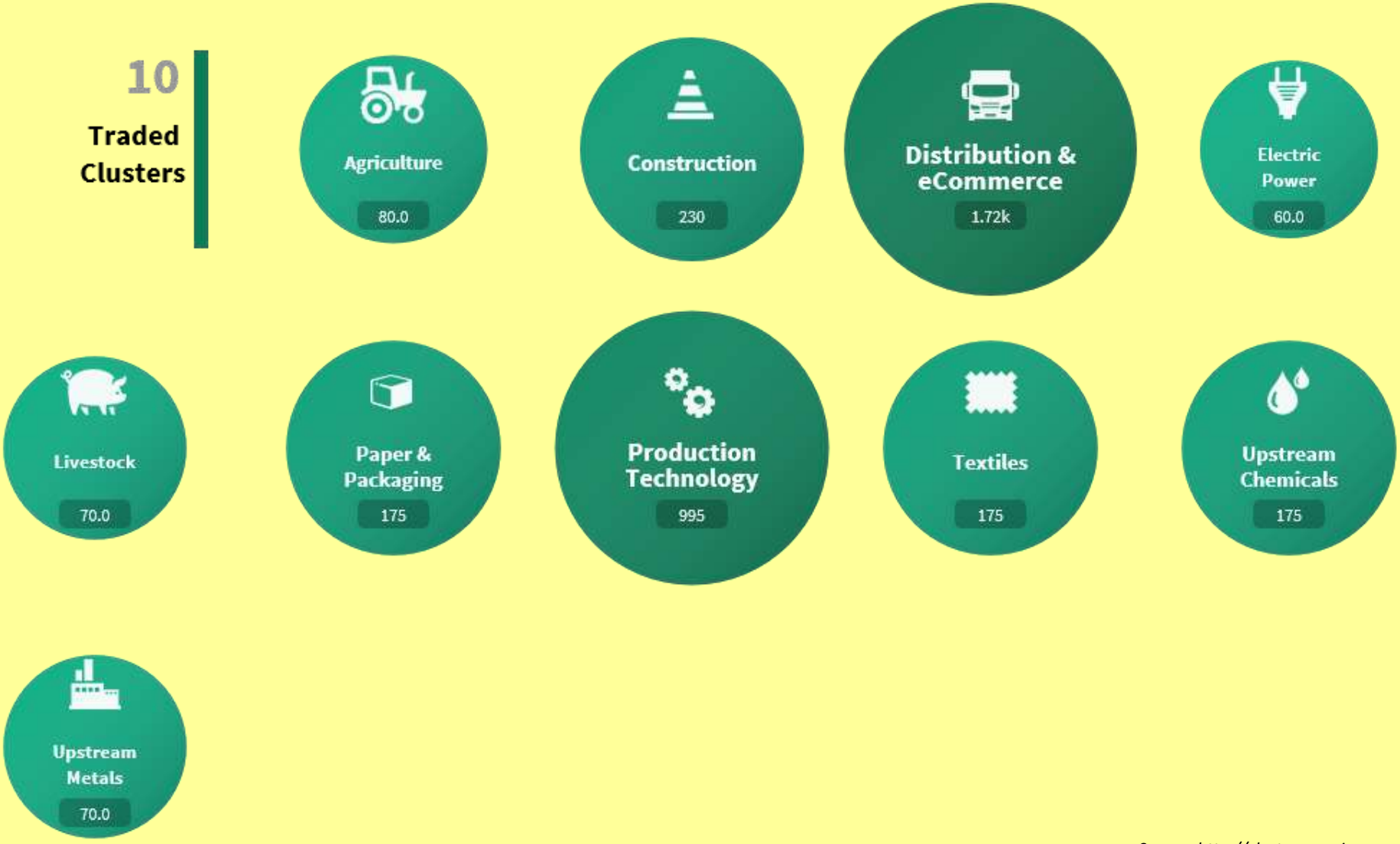
Pierce County



Source: http://clustermapping.us

Tift County

10
Traded Clusters



Source: http://clustermapping.us

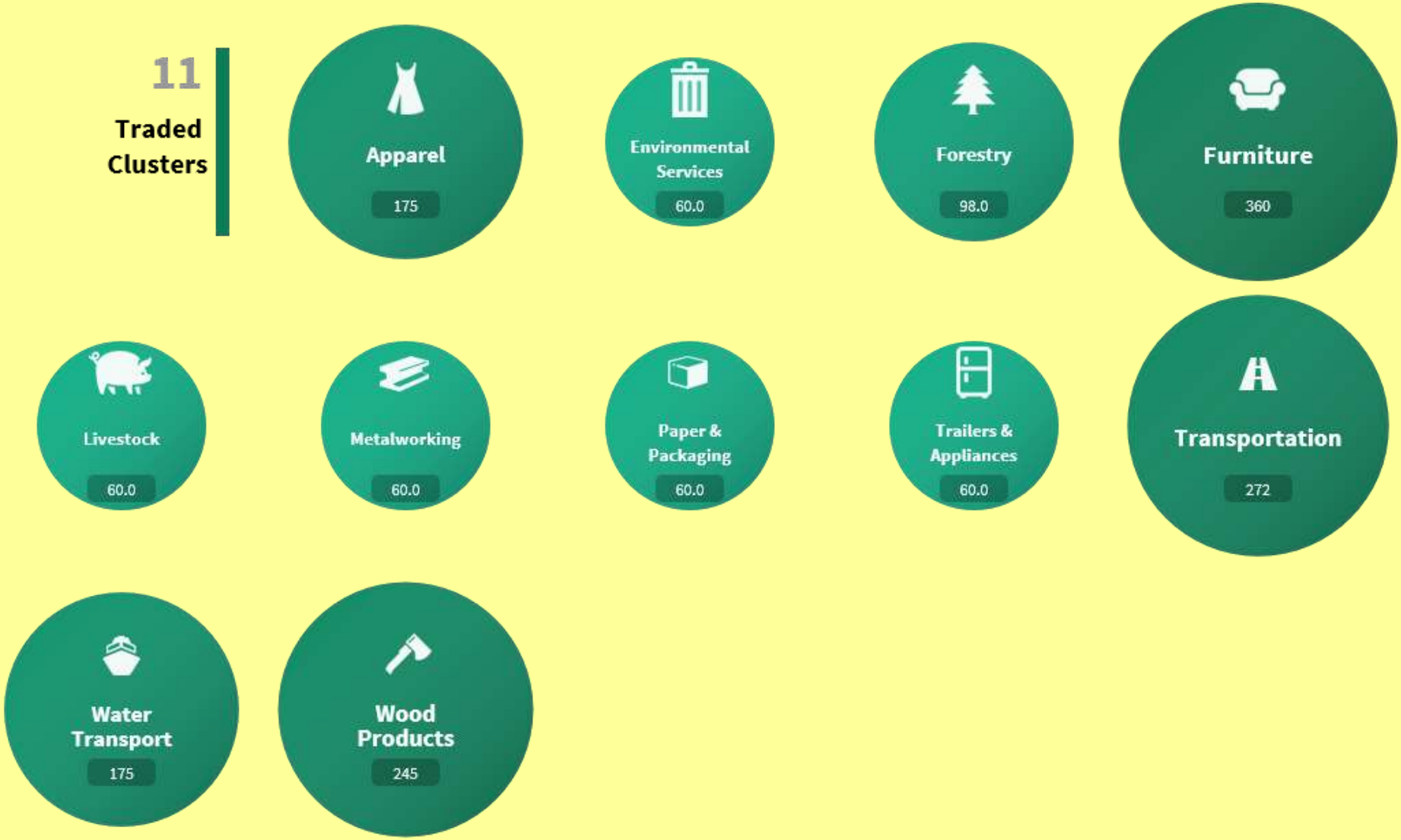
Turner County

6
Traded Clusters

Source: http://clustermapping.us

Ware County

11
Traded Clusters



Source: http://clustermapping.us

E. REGIONAL RESOURCES

The Southern Georgia region has many resources available to assist in planning and development, and in support of economic development projects. Collaboration among the private sector entities, university system partners, and local, state, and federal government organizations speeds the innovation process when planning a project.

The following is a listing of the local, state, and federal resources utilized by the Southern Georgia Regional Commission in its ongoing efforts to foster economic development in the region:

- Economic Development Administration
- Georgia Department of Community Affairs
- OneGeorgia Authority
- Georgia Department of Economic Development
- State of Georgia Regional Staff –"Team Georgia"
- Statewide Economic Developers - Georgia Power Company, Oglethorpe Power Company, Municipal Electric Authority of Georgia (MEAG) Power, and Municipal Gas Authority of Georgia (MGAG).
- Georgia Small Business Development Center (SBDC)
- Georgia Tech Enterprise Innovation Institute
- Georgia Centers of Innovation – Aerospace, Agribusiness (located in Tifton), Energy, Life Sciences, Logistics, and Manufacturing.
- City and County Community and Economic Development Staff
- Local Chambers of Commerce and Development Authorities
- Joint Development Authorities

F. REGIONAL CHANGES

The toxic combination of low per capita income (PCI) and persistent unemployment has seriously damaged the health of the economy in the region. The majority of the counties in the Southern Georgia EDD have struggled with low per capita income for decades. The sluggish rebound of regional unemployment rates accurately reflects the economic distress and adverse conditions that have been present since the economic downturn. However, there are signs that the economic conditions in the region are improving including a reduction in the number of plant closures and job losses over the past several years. In previous years, the number of closing industries and jobs lost has been high; the 2013 CEDS Annual Performance Report revealed that four large industries had closed and 387 jobs were lost. However, the 2014 CEDS Annual Performance Report noted that only one large industry had closed and 105 jobs were lost. The positive trend is continuing – there were no industry closures during the 24-month period covered by the 2015 and 2016 CEDS Annual Performance Reports.

Additional indications that the Southern Georgia EDD is experiencing an economic upturn is the increased number of economic development activities that are occurring throughout the region and are resulting in the creation of new jobs. New businesses and industries have located in the region while others are expanding. Specific information about the private investments being made by new and existing businesses/industries and the resulting jobs creation is available for review in Section IV.

Section II

Goals, Objectives, & Implementation Strategies

The following Goals, Objectives and Implementation Strategies will promote economic development and opportunity, foster effective transportation services, enhance and protect the environment, maximize effective development of the workforce consistent with any applicable State or local workforce investment strategy, promote the use of technology in economic development including access to high-speed telecommunications, balance resources through sound managements of physical development, and obtain and utilize adequate funds and other resources. These goals, objectives, and implementation strategies are an effective roadmap to prosperity for the Southern Georgia EDD.

Economic Development

Goal:
Coordinate economic development initiatives with a variety of economic development entities.

Objective:
Promote coordination among all economic development entities in the region.

Objective:
Promote region-wide export data study.

Goal:
Create a regional database of sites that are available for industrial development.

Objective:
Encourage local governments to inventory sites available for development.

Goal:
Improve/upgrade the educational levels and labor force skills within the region.

Objective:
Develop and support community based efforts to address improved educational levels and labor force skills.

Objective:
Support the continued improvement of the educational system in addressing educational/skills improvement and ensure WIA coordination.

Economic Development

Goal:
Coordinate local, state, and federal economic development planning and implementation.

Objective:
Ongoing economic development programs that result in improvements in the regional tax base and jobs.

Objective:
Adequate transportation systems to meet the needs of existing and new businesses and industries including a connection of all counties to interstate highways with four-lane roads.

Goal:
Promote a regional development authority for region.

Objective:
Encourage local governments to form a regional development authority that will work together for improved development within the region as a whole.

Economic Development

Implementation Strategies:

- *Encourage cooperation among public and private organizations to ensure that business and industry continue to consider the region.*
- *Facilitate and encourage coordination between the local government and the area Chamber of Commerce to develop a list of target industries for each community and/or county that will provide year round employment opportunities.*
- *Focus on regional tourism. Many good recreation/tourism opportunities in this region; hunting and fishing, etc... This could be a major contributor to the economic development of this region.*
- *Assist local governments in inventorying availability of sites for industrial development.*
- *Support, coordinate, and develop implementation of WIA programs to improve the labor force.*
- *Assist in establishing leadership development programs for all counties and include training on educational level/labor force skills improvement.*
- *Encourage local and regional industries/businesses to perform on the job training for potential employees.*
- *Promote coordination between the local government and the area businesses and agencies to identify ways to attract and retain more young, workforce age population to the region.*

Economic Development

Implementation Strategies:

- *Support continued expansion of facilities and programs of state's technical colleges in the region.*
- *Develop and maintain a web-based clearinghouse of information on available and upcoming grant and loan opportunities, as well as technical assistance opportunities through the regional commission's website.*
- *Continue to monitor grant opportunities and inform local communities about upcoming deadlines and assist local communities in the grant preparation and application.*
- *Study existing industries, special or unique economic activities and recent trends in small businesses to attempt to identify potential satellite industries or other economic development ideas or potential projects (research and market studies).*
- *Support region-wide export data study to identify businesses/industries that are exporting and where they are exporting. Also work to identify similarities in the exports and determine new exporting opportunities.*

Population

Goal:
A well trained workforce, professional, technical and skilled, capable of accommodating new industry and maintaining existing industry.

Objective:
Improve educational attainment by reducing high school drop-out rates.

Goal:
Create and maintain long-term, meaningful employment opportunities sufficient to establish a sound and balanced economic base in which average per capita income and employment levels are consistently comparable to those of the State and Nation.

Objective:
Encourage public/private partnerships between counties, cities, local businesses and schools for the development of work programs and career education programs such as career academy for young adults.

Objective:
Support educational institutions to provide learning/skill development opportunities.

Population

Implementation Strategies:

- *SGRC will provide support staff for all Workforce Development Board objectives including; continuing development of youth education/employment programs and occupational skills development programs for adults and dislocated workers, and comprehensive multi-agency one-stop workforce network and systems.*

- *Continue to support funding and expansion of all forms of education.*

- *Dissemination of census data as it becomes available.*

Community Facilities

Goal:
County and City management utilize a capital improvement planning process.

Objective:
Long-range public facility and infrastructure improvement plan with engineering and architectural cost estimates provide basic foundation for a growth management system.

Objective:
Preventive maintenance and improvement programs with identified and budgeted revenue sources within a prescribed timetable avert the crisis.

Objective:
Land use plans can be implemented by adhering to a CIP which identifies what, where and when a public facility is going to be completed.

Goal:
Public services and facilities adequate to accommodate existing and future growth.

Objective:
Industrial Parks/properties with all necessary infrastructure and transportation links, to attract new and expanding businesses and industries to the region.

Objective:
Availability of speculatively built and other buildings to attract new and expanding businesses and industries in the region.

Objective:
Availability of adequate financing and/or financial incentives to attract new and expanding businesses and industries to the region.

Community Facilities

Implementation Strategies:

- *The SGRC will act as a catalyst and partner with interested cities and counties to prepare a capital improvement program by annually assisting in the update to their short-term work program.*

- *As requested, coordinate interest and support from small cities to provide an urban level of services, i.e., add sanitary sewer collection and treatment systems.*

- *Working with qualified engineering consultants, assist cities and counties to prepare system-wide water and sanitary sewer system assessments, which include future line extension needs and capital improvement programs consistent with their adopted Comprehensive Plan.*

- *Assist local and regional industrial development organizations with development of grants-in-aid applications for industrial/business development consistent with local and regional objectives. Assist with project implementation as requested.*

- *Research and make available various state and federal grants and loan programs that can be utilized for local or regional infrastructure development.*

- *Maintain regional web-enabled economic development database.*

Land Use

Goal:
Promote the enactment of land development regulations at the local level.

Objective:
Encourage the region's governments to adopt local development regulations.

Goal:
Encourage the establishment of minimum housing codes by all local governments to ensure that mobile homes are maintained properly.

Objective:
Educate local governments on the benefits of enacting and enforcing minimum housing codes.

Goal:
Promote the use of level site plan reviews.

Objective:
Encourage local governments to enact a site plan review system.

Goal:
Promote the creation and updating of local level future land use maps and plans.

Objective:
Encourage local governments to prepare and update future land use maps and plans.

Land Use

Implementation Strategies:

- *Provide technical assistance and encourage local governments to adopt LDR's.*
- *Assist local governments in writing mobile home ordinances.*
- *Assist local governments with the development of site plan review system.*

Transportation

Goal:
Ensure that the region's transportation systems are intact to facilitate growth.

Objective:
Encourage local governments to review their comprehensive plans, study growth patterns, and plan growth according to transportation attributes.

Objective:
Encourage local governments to establish public transportation systems.

Objective:
Encourage local governments to implement the Southern Georgia Regional Bicycle and Pedestrian plan.

Transportation

Implementation Strategies:

- *Assist all local governments wishing to update and amend comprehensive plans, future land use maps, provide GIS studies to facilitate transportation studies and growth patterns.*

- *Support all local governments wishing to establish public transportation systems. Provide GIS studies, cost-to-benefit studies, and work with other agencies to facilitate development of public transportation systems.*

- *Continue to promote and implement the Bicycle and Pedestrian Plan through special events, education and sharing of information such as sponsored bike rodeos and through development of Bicycle and Pedestrian facility assessments.*

Housing

Goal:
Maintenance and improvement of existing and future housing and the elimination of the region's substandard housing conditions.

Objective:
Assist local governments with the development of a Building Inspection Program.

Objective:
Encourage local governments to participate in CHIP, CDBG, and USDA housing programs.

Objective:
Work with local governments to develop ordinances for manufactured home usage and placement.

Goal:
Provide affordable housing options for low-to-moderate income persons.

Objective:
Develop homebuyer programs for low-to-moderate income persons.

Housing

Goal:
Conservation, maintenance and improvement of existing/future housing and neighborhoods, and the elimination of substandard housing conditions in the region.

Objective:
All cities and counties should be encouraged to establish and maintain an annual housing condition inventory; and adopt or revise and update building and housing codes, using applicable state or national models.

Objective:
All substandard housing units, which are inventoried and suited for rehabilitation should be scheduled for rehabilitation in a manner consistent with the local comprehensive plan.

Housing

Implementation Strategies:

- *Assist all local governments wishing to participate in any housing programs, by providing technical assistance, grant writing, and/or administration.*
- *Work with local governments to develop strategies to address the placement and usage of manufactured housing.*
- *Work with local, state and federal agencies to publicize existing homebuyer programs.*
- *As requested, SGRC will provide assistance to cities/counties for housing conditions surveys as related to state and federal planning.*
- *SGRC will provide technical assistance to countywide planning advisory commissions and local elected officials to adopt, revise, or update housing, building and property maintenance codes.*

Natural & Cultural Resources

Goal:
Promote the region's natural resources as opportunities for tourism and recreation.

Objective:
Create more opportunities for natural resource related recreation such as bike trails, access to waterways, fishing, hunting, and ecotourism, walking and hiking trails.

Goal:
Protect river corridors in developing areas of the region.

Objective:
Prepare and adopt appropriate codes and ordinances to protect river corridors.

Objective:
Encourage the consistent enforcement of state environmental regulations to protect the region's natural resources.

Goal:
Implement a regional historic and cultural resource inventory for the region.

Objective:
Encourage local governments to inventory their historic and cultural resources for their area. .

Goal:
To identify, preserve, protect, and manage the broad range of cultural and historic resources in the Southern Georgia Region.

Objective:
Areas, structures, and districts of significant architectural, archaeological, historic and/or cultural value should be identified and protected by appropriate local units of governments.
.

Objective:
Ongoing public/private partnerships, education, and awareness are integral to the preservation of the regions heritage.

Objective:
Special management practices must be applied to those areas possessing significant natural, historic, archaeological, or cultural features.

Natural & Cultural Resources

Implementation Strategies:

- *Assist local governments in conducting an inventory of their available natural resource assets.*
- *Provide model ordinances to local governments to assist in the protection of river corridors.*
- *Encourage local governments to enforce state ordinances protecting groundwater, recharge areas, wetlands, and river corridors.*
- *Provide technical assistance to local governments that are inventorying their historic and cultural resources.*
- *SGRC will encourage and assist counties and cities to conduct countywide surveys of historic resources to identify significant historic areas, structures and districts. Survey data will be incorporated in the regional/statewide geographic information system.*
- *Assist local units of government in preparation of Transportation Alternatives Program (TAP) Projects to assist in historic downtown revitalization projects.*
- *SGRC will provide technical assistance for cities and counties that have or are interested in creating, historic preservation ordinances, commissions, historic district zoning ordinances, and aesthetic zoning overlay districts.*

Section III

Performance Measures

The following are the performance measures that are being utilized to evaluate the Southern Georgia Regional Commission's successful development and implementation of the CEDS. These performance measures are: the number of jobs created after the implementation of the CEDS, the number and types of investments that will be undertaken in the region, the number of jobs retained in the region, the amount of private sector investments in the region after the implementation of the CEDS, and the changes in the economic environment of the region.

1. Number of jobs created/retained and private investment made after implementation of the CEDS.
   - Quarterly reporting from regional ED Pros (Chamber of Commerce's, Better Hometown and MainStreet Programs, and Development Authorities) on jobs creation/retention and private investment in their local communities.
   - Quarterly updates from the Southern Georgia Regional Commission Loan Program division on new private investment in the region and state.
   - Local businesses/industries in region advertise successful growth and job retention through PSA's, newspaper, local television and radio.
   - Compare Census statistics
   - Evaluate tax digest ; increase/decrease
   - Evaluate sales tax; increase/decrease
   - Increase/decrease in business licenses
   - Governors listing of imminent business/industry closures

2. Number and types of public investment undertaken in the region.
   - Semi-annual reporting from the Regional Commission, Local Governments, and the Workforce Development Board on new investments in region.

3. Changes in the economic environment of the region.
   - Local governments, ED Pros, and the Workforce Development Board report major changes to the region's economic environment to the Regional Commission.

Section IV

Regional Economic Progress & CEDS Implementation

Jobs Creation/Retention & Public-Private Investments

The Annual Performance Report serves as an assessment tool utilized to gauge the implementation of the CEDS. This document is maintained by the support staff of the Regional Commission under the guidance of the CEDS Committee and Regional Commission Council.

Despite the lingering effects of negative economic indicators in the SGRC EDD region, jobs creation and retention as well as sizeable private investment did occur. The following is a status report that reflects positive economic activity as well as progress on CEDS implementation.

- Number of jobs created and/or retained: A total of 245 jobs have been created/retained in the region in 2015-2016 through the SGRC's Loan and Economic Development Programs.

- Number and types of investments undertaken in the region: Fourteen (14) companies invested just over $11.5 million in private equity to perform start-ups or expansions in the region.

- Amount of public sector investment in the region: The above mentioned projects received public sector funding (federal, state, and local) in the amount of $5,326,449.

- Total value of projects (public, private, and leverage): $16.8 million

- Additional activity: Infrastructure and improvements, including water and sewer, street paving and drainage, rail spurs, and new industrial facilities, have been constructed in many of the counties in the region during this planning period to better accommodate business and industrial growth and expansion.

Section V

Adoption Resolution

RESOLUTION
SOUTHERN GEORGIA REGIONAL COMMISSION

ADOPTION OF THE
ANNUAL
COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)
PERFORMANCE REPORT

September 22, 2016

WHEREAS, the Southern Georgia Regional Commission, as the Economic Development District for the eighteen county region of Southern Georgia, is required to adopt and submit an Annual Performance Report on its Comprehensive Economic Development Strategy (CEDS) to the Economic Development Administration; and

WHEREAS, the Southern Georgia Workforce Investment Board served as the official 2013-2018 CEDS Committee and provided guidance and oversight into the regional planning process, and;

WHEREAS, the Annual CEDS Performance Report documents the progress achieved on economic development activities, adjusts the 2013-2018 five-year plan, reports on changing economic development conditions in the region, and identifies projects for Economic Development Administration funding consideration.

NOW THEREFORE, BE IT RESOLVED BY THE governing Council of the Southern Georgia Regional Commission that:

1. The Annual CEDS Performance Report for the period October 1, 2015 - September 30, 2016 is hereby adopted; and

2. The staff of the Southern Georgia Regional Commission is instructed to transmit the Annual CEDS Performance Report to the Economic Development Administration's Atlanta Regional Office, and

3. The staff is authorized to transmit copies of this resolution and/or Annual CEDS Performance Report to other appropriate officials.

ADOPTED THIS 22nd DAY OF SEPTEMBER 2016

Michael Dinnerman, Chairman

Lisa Cribb, Executive Director