



VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

GO Virginia Region 9

Growth & Diversification Plan Update

August 2019

GO Virginia Region 9



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Acknowledgements

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- UVA Career Services
- UVA Licensing & Ventures Group

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**GO Virginia Region 9
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EXECUTIVE SUMMARY

Introduction

This report is an update to the original Growth and Diversification Plan (Growth Plan) published by Camoin and Associates in August 2017 on behalf of the GO Virginia Region 9 Council. The goal of this report is to respond to the Growth and Diversification Plan Amendment Guidelines approved by the GO Virginia Board on March 12, 2019 and to comply with the Growth and Opportunity Act (2016) that requires regional plans be updated at least every two years. While preparing this report, the Council has identified accessible data sources related to regional objectives to ensure that success can be more easily measured thus ensuring this plan becomes an interactive and dynamic document.

Most of the data for regional target industries was pulled from JOBS EQ from CHMURA. JOBS EQ is the in-house database available at the Central Virginia Partnership for Economic Development (the Partnership), the support organization for the Region 9 Council.

Much of the forward looking data for reviewing the four established project frameworks was sourced from key regional partners who are experts in specific subject areas.

About GO Virginia

GO Virginia, where “GO” stands for Growth & Opportunity, is a statewide economic development initiative to promote private-sector economic growth and diversification across Virginia by targeting new investment and innovation in high-income and export-oriented industry sectors. To implement the program statewide, nine different regional councils were established and tasked with creating initial regional Growth & Diversification Plans (Growth Plan) specific to each region. Each Council is responsible for awarding grants that incentivize collaboration between higher education, business and local government to address the opportunities outlined in each respective regional Growth Plan.

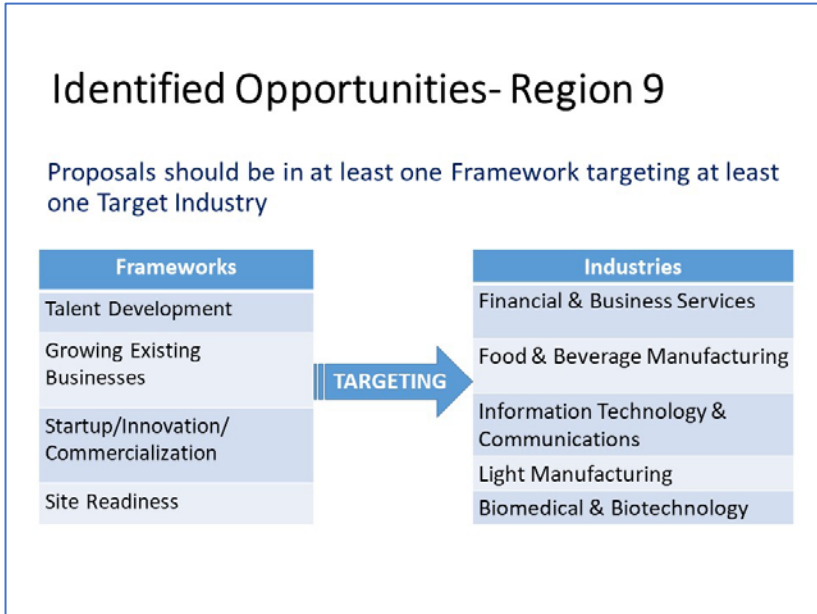
About Region 9

GO Virginia Region 9 (Region 9) incorporates eleven localities in Central Virginia that together encompass rural settings and active downtown main streets. The region includes the Counties of Albemarle, Culpeper, Fauquier, Fluvanna, Greene, Louisa, Madison, Nelson, Orange, and Rappahannock, and the City of Charlottesville. Region 9 shares the same footprint as Virginia Career Works - Piedmont Region, as well as the combined footprints of two planning districts, the Rappahannock-Rapidan Regional Commission (Planning District 9) and the Thomas Jefferson Planning District Commission (Planning District 10). The Central Virginia Partnership for Economic Development (Central Virginia Partnership) is the administrative support organization of the Region 9 Council and shares a similar footprint. The Partnership doesn't cover the Counties of Fauquier and Rappahannock. .

Frameworks and Target Industries

The 2017 Region 9 Growth Plan set forth four primary frameworks for targeting specific industries in order to advance regional growth objectives. In short, project proposals for grant funds must be in at least one framework including: Talent Development, Growing Existing Businesses, Startups/Innovation/Commercialization, and/or Sites. Proposals must also target one or more of five target industries including: Financial and Business Services, Food and Beverage Manufacturing, Information Technology/Communication, Light Manufacturing, and, Biomedical and Biotechnology.

Upon reviewing data, the Council has determined that there should be no immediate change in the four frameworks or target industries, at this time. The frameworks align with GO Virginia Board activities and the target industries still represent the largest sectors where growth in higher paying jobs can impact the regional economy. There are, however, new or refined opportunities in those target sectors that have been developed through stakeholder engagement and lessons learned. These opportunities have also been informed by guidelines and policies established by the GO Virginia Board.



Though the frameworks and target industries will remain as they are for the next two years,

there should also be a mechanism for identifying potential new industries or reacting to unexpected transformational opportunities that may arise.

It should be noted that a regional workforce gap analysis does not indicate singular gaps for these regional industries. This lack of compelling data signifies an opportunity for regional sector strategy development through GO Virginia projects.

Outcomes

In 2016, baseline regional economic data was provided by the George Mason University Center for Regional Analysis to develop the Region 9 Growth Plan. Originally, the key baseline metric was based on Per Capita Income sourced from the US Bureau of Economic Analysis. In 2018, the GO Virginia Board amended the baseline metric to regional average annual wages and pulled that data from JOBS EQ.

Per data pulled from JOBS EQ, in Region 9, average annual wages in Q4 of 2016 were \$46,252. Preliminary data indicates average annual wages in Q4 of 2018 are \$48,477. A growth trend has been established. Growth is occurring in the target industries that is above the five year average, as well. That said, because the Growth Plan was published in August 2017 and the first Region 9 project was awarded in March 2018, a direct impact from projects cannot yet be correlated. For more details, see the attached Report and Appendix following.

Updated Opportunities

The following is a summary of the priority opportunities for the Region 9 Council to support through driving project development. All grant proposals must specifically address one or more of these opportunities. More details follow in the Update Report and Appendix sections.



Talent Development

Support development of a regional workforce project to convene stakeholders for developing regional target sector based strategies.

Support growth of Information Technology, as well as all other target sectors, through a Tech Talent pipeline initiative.

Evaluate how credentialing, apprenticeship, and /or internship programs for target industries could support higher paying jobs and/or growth of the traded sector.

Continue supporting and monitoring Talent Development projects including George Washington Carver-Piedmont Technical Education Center (GWC-PTEC), Central Virginia Cybersecurity, and Crafting Higher Paying Jobs and Adult Beverage Exports.



Growing Existing Businesses (Scale-Up Existing Clusters)

Support growth of the biotechnology and biomedical cluster to attain a critical mass of enterprises, talent and intellectual property.

Support development of a large amount of new square footage serving the biotech industry in a strategically concentrated area including wet lab space.

Identify scale-up opportunities in other targeted sectors, such as export growth for Food & Beverage Manufacturing, Light Manufacturing, and Information Technology.

Monitor the opportunity for supporting broadband initiatives as the access to broadband is a critical need in most Region 9 localities.



Startups/Innovation/Commercialization (Entrepreneurship Ecosystem)

Facilitate initiatives that advance opportunities outlined in the TEconomy Region 9 Assessment.

Review the opportunity for developing a plan to set aside specific Per Capita funds to invest in the entrepreneurship ecosystem as outlined by the GO Virginia Board.

Support development of a rural entrepreneurship coalition in rural counties.



Sites

Encourage and support the creation of a Regional Industrial Facilities Authority (RIFA) or equivalent regional collaborative partnerships, as appropriate to support regional site development.

In collaboration with partners, outline a regional approach to addressing the region's site readiness needs by advancing sites through the Virginia Business Ready Sites Program (VBRSP).

Support and encourage the continued development of the regional business park in Louisa County.

Advance further development of current sites and seek opportunities for regional collaboration on new sites.



Other

Review the 2019 Central Virginia Partnership Strategic Plan to identify areas for collaboration and efficiencies to drive the creation of high paying jobs and growing the traded sector in Region 9.

Explore opportunities to assess and support the development of emerging industries that could help the region grow high paying jobs and expand the traded sector (i.e. Hemp Industry, Renewable Energy Industry, and Environmental Sustainability Industry).

Implementation & Funding

The Central Virginia Partnership for Economic Development serves as the support organization for the Region 9 Council, therefore, this organization is the most critical partner for implementing Growth Plan opportunities, though there are many others.

The Capacity Building funds allocated by the General Assembly are critical for administration and overview of the GO Virginia Region 9 initiative. If there is a time when match dollars are required for Capacity Building funds, the Partnership's capacity to serve in this role will be critically hampered.

Since the Region 9 Growth Plan was published, new partners and mechanisms for project match funding have been developed or identified. The Council will continue to work with localities to set aside match funding while also exploring opportunities for funding with private foundations or other sources.

Performance Metrics

As mentioned, one goal of this report is to develop readily accessible sources of data through the Central Virginia Partnership or through partners that are currently tracking the needed information. The Council and Region 9 Staff believe this is an important efficiency for sustainability of this program's effectiveness in Region 9 and ensures that data can be tracked and or accessed as close to real time as possible.

Report and Data Appendix

Following is the 2019 GO Virginia Region 9 Growth & Diversification Plan Update Report and Appendix.

Additional Information

GO Virginia Region 9 at www.GOVirginia9.org

Central Virginia Partnership for Economic Development at www.CentralVirginia.org

GO Virginia at www.GOVirginia.org

Department of Housing and Community Development (DHCD) at <https://www.dhcd.virginia.gov/gova>

Growth and Opportunity Act at <https://vacode.org/2016/2.2/1/D/24/26/>

**GO Virginia Region 9
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REPORT

Introduction

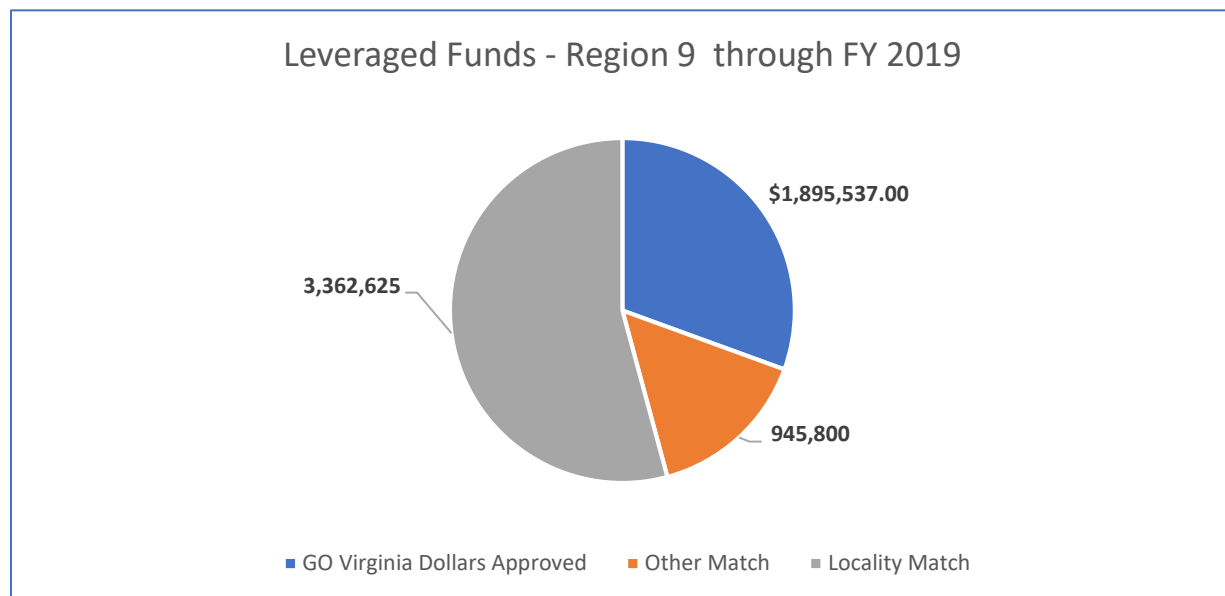
In order to determine opportunities and priorities for the coming two years, the Region 9 Council first reviewed prior year successes, summarized lessons learned and evaluated metrics. The following provides a summary of those efforts.

The GO Virginia Region 9 Growth and Diversification Plan (Growth Plan) developed by Camoin and Associates was published in August 2017. The Plan identified four project frameworks for targeting five target industries to drive the growth of high paying jobs and growth in the traded sector throughout Region 9. The 2017 Growth Plan established that projects must be in the areas of Talent Development, Growing Existing Businesses, Entrepreneurship & Innovation, or Sites. Project must also target one or more of specific industries including Financial and Business Services, Food and Beverage Manufacturing, Information Technology/Communication, Light Manufacturing, and, Biomedical and Biotechnology.

Based on a review of the data, lessons learned and policies and guidelines from the GO Virginia Board, the Region 9 Council is not recommending changes in the established frameworks or target industries. However, the opportunities have been updated based on data review, stakeholder input and project activities.

Prior Year Successes

Since the Growth Plan's release, the Region 9 Council has approved eight grants to advance opportunities identified in the 2017 Growth Plan.



These eight projects have been approved by the GO Virginia Board. To date, the Region 9 Council has awarded \$ 1,895,537 in Per Capita grants, including \$325,715 in Enhanced Capacity Building (ECB) grants. Together these projects leveraged over \$3,300,000 in locality match; \$430,860 in private sector support; and \$425,000 from education. All counties have participated in some way in at least one grant. Additionally, all three community colleges, Germanna Community College (GCC), Lord Fairfax

Community College (LFCC), and Piedmont Virginia Community College (PVCC), and the University of Virginia (UVA) have participated in more than one project. At least eleven businesses in the region are engaged in regional grants in progress.

All industries, with the exception of Financial and Business Services, have been targeted for growth through these funded projects.

The Central Virginia Site Readiness project, an enhanced capacity building (ECB) grant, has completed activities. Though this project was an Enhanced Capacity Building effort, it has demonstrated measurable outcomes in terms of supporting the increase in number of Tier 4 Sites within the region from zero prior to the 2017 Growth Plan to four Tier 4 sites to date.

The Region 9 Council has oversight in place to ensure that projects stay on track and will take actions to assist applicants as needed to address barriers. Project budgets are reviewed at each Council meeting and potential barriers are discussed and action plans are developed.

Region 9 Funded Projects

The Region 9 Council has submitted and been approved for eight projects since the publication of the 2017 Growth Plan.

Project	GO Virginia \$	Locality Match	Other Match	Description
George Washington Carver Piedmont Technical Education Center (GWC PTEC) Culpeper County with Counties of Fauquier, Madison, Orange, and Rappahannock; and Germanna CC	\$ 244,300	\$ 431,625	\$ 1,000,000	Talent Development targeting Light Manufacturing
Crafting Higher Paying Jobs and Adult Beverage Exports PVCC with Germanna CC and the Counties of Madison and Nelson	\$ 249,472	\$ 50,000	\$ 259,000	Talent Development targeting Food & Beverage Manufacturing
Central Virginia Cybersecurity Partnership PVCC with GCC and LFCC	\$ 100,000	\$ 0	\$ 136,400	Talent Development (ECB) targeting IT/Communications
Central Virginia Site Readiness Central Virginia Partnership with Counties of Albemarle, Culpeper, Fluvanna, Greene, Louisa, Madison, Nelson, and Orange	\$ 58,675	\$ 58,675	\$ 0	Site Development (ECB) targeting Light Manufacturing
CvilleBioHub CvilleBioHub with City of Charlottesville, Albemarle County and UVA	\$ 83,540	\$ 10,000	\$ 84,600	Grow Existing Businesses (ECB) targeting Biotech
Catalyst Accelerator Project City of Charlottesville, Albemarle County, UVA Economic Development, UVA Darden School of Business Batten Institute for Entrepreneurship and Innovation, Community Investment Collaborative	\$ 475,200	\$ 110,000	\$ 354,200	Entrepreneurship & Innovation targeting traded sector
Young Entrepreneurs Resource Guide Fauquier County with Counties of Culpeper, Louisa, Madison and Orange; and, Orange County Schools, Culpeper County Schools; Fauquier County Schools; Wakefield School in Fauquier; Mason and Fauquier Enterprise Centers	\$ 83,500	\$ 87,500	\$ 5,000	Entrepreneurship & Innovation targeting traded sector
Regional Business Park Louisa County and nine localities represented by the Central Virginia Partnership, Goochland County	\$ 600,850	\$ 2,802,150	\$ 0	Site targeting traded sector
	\$1,895,537	\$3,362,625	\$945,800	

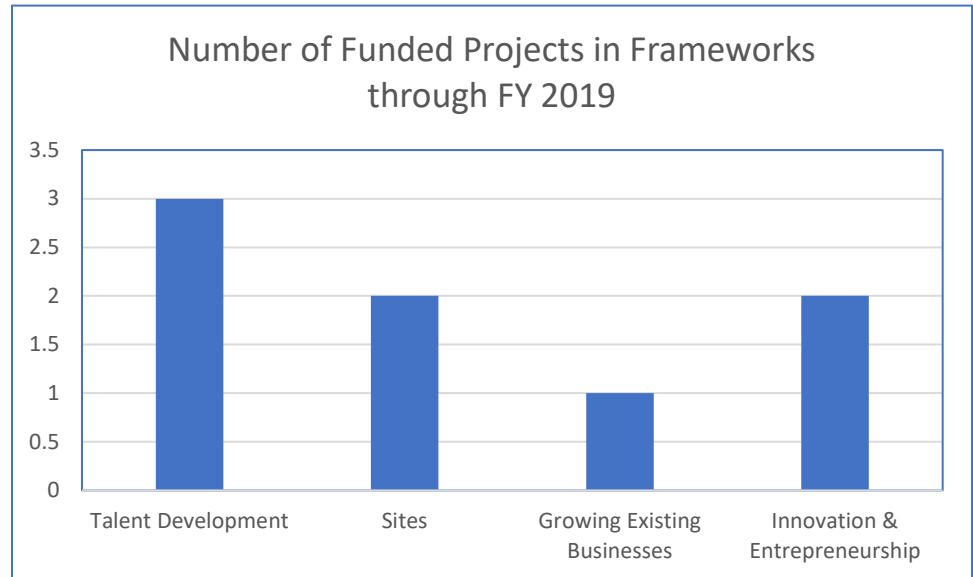
Target Industries

It is recommended in this 2019 Plan Update that the target industries identified in the original Growth Plan (2017) remain the same for the next two years.

This Growth Plan Update is being prepared to be in compliance with the requirements of the Growth and Opportunity Act, but also to ensure the region continues to optimize success through the GO Virginia mechanism.

Average Annual Wages for all industries in Region

9 increased from \$46,252 in 2016 Q4 to \$47,800 in 2017 Q4 for an annual change in average annual wages of 3.3%. The average annual wage increase in 2016 Q4 was 0.8%. Preliminary data through 2018 Q4 indicates the average annual wage to be \$48,477 with a 1.4 % average annual increase from prior year and quarter.



Workforce Gap Analysis

As of Q1 2019, eleven industries in Region 9 are projected to experience workforce supply gaps with the largest gap in Healthcare Practitioners and Technical Occupations (107) according to data from JOBS EQ. Healthcare is not a target industry, however, the positions falling within the next three highest gaps in Management Occupations, Computer and Mathematical Occupations, and Business and Financial Operations Occupations will affect regional target industries. The top five projected gaps are listed in the table below and the full table is enclosed in the Appendix.

This data does not spotlight one significant regional issue nor does it represent current activity in the marketplace. Regional economic development announcements indicate that there are at least three employers in the region that are expanding and cumulatively seeking over 300 employees mostly in software development. Therefore, the Council views the need to collaborate with partners to engage sector stakeholders to develop regional project in Talent Development as an opportunity, as noted in the Updated Region 9 Opportunities.

SOC	Title	Annual Supply Gap	Current Employment Q1	Total Annual Demand
29-0000	Healthcare Practitioners and Technical Occupations	(107)	9,473	11,041
11-0000	Management Occupations	(50)	8,584	9,466
15-0000	Computer and Mathematical Occupations	(40)	4,889	5,622
13-0000	Business and Financial Operations Occupations	(39)	9,490	10,453
25-0000	Education, Training, and Library Occupations	(11)	13,890	15,219

JOBS EQ

Growth of Target Industries

As of 2018 Q4, employment in all industries in the region has increased from 182,497 in 2016 Q4 to 188,702, an increase of 3.4%. The five year average annual growth rate was 1.9%.

Financial and Business Services

Financial and Business Services industry grew by 486 jobs, the highest number of the five regional target industries in that same time period, from 16,166 (2016 Q4) to 16,652 (2018 Q4) to achieve 3% growth. The five year average annual rate of growth for this regional industry is 2%.

The Financial and Business Services industry sector is made up of 22 different 4-digit North American Industry Classification System (NAICS) codes covering a broad range of products and services. Industries in this sector include finance, insurance, and real estate, accounting, consulting, and data processing services. This industry sector covers an array of services related to finance and business management including, Other Investment Pools and Funds (NAICS 5259) with a Location Quotient (LQ) of 3.48; Other Professional, Scientific, and Technical Services (NAICS 5419) with an LQ of 1.06; and, Computer Systems Design and Related Services (NAICS 5413) with an LQ of 1.06.

Food and Beverage Manufacturing

Food and Beverage Manufacturing industry grew by 346 jobs from 1,889 (2016 Q4) to 2,235 (2018 Q4) for an 18% growth rate during that time. The five year average annual growth rate is 9.8%.

The Food and Beverage Manufacturing industry sector includes 10 different 4-digit NAICS industries that are all involved in the food manufacturing process. Dominant industries in Region 9 are in Beverage Manufacturing (NAICS 3121), particularly the manufacturing of beer, wine, and soft drinks with an LQ of 5.62.

Information Technology /Communication

Information Technology/Communication industry grew by 183 jobs from 11,792 (2016 Q4) to 11,975 (2018 Q4) for a 1.6% growth rate. The five year average annual rate of growth for this region is 1.2%.

The Information Technology/Communications sector includes 16 different 4-digit NAICS industries involved in the development, manufacturing, and use of Information Technology (IT) and related services. Important areas within this sector are Scientific Research and Development Services (NAICS 5417) with an LQ of 1.97; Industrial Machinery Manufacturing (NAICS 3332) with an LQ of 1.91; Instrument Manufacturing (NAICS 3345) with an LQ of 1.26; and, finally, Computer Systems Design and Related Services with an LQ of 1.06.

Light Manufacturing

Light Manufacturing jobs increased by 573, from 8,470 (2016 Q4) to 9,043 (2018 Q4) for a 6.7% growth rate for that time period. The five year average annual rate of growth for the region is 2.9%.

Light Manufacturing in Region 9 includes forty-five 4-digit NAICS industries that typically requires relatively less capital investment and often involves final assembly steps for consumer goods, medical components, high-tech devices, and other goods.

One sector not already listed within other Region 9 target industries, such as Beverage Manufacturing and Information Technology/Communications, is Refrigeration and Equipment Manufacturing (NAICS 3334) with an LQ of 1.64.

Biomedical and Biotechnology

The Biomedical and Biotechnology industry in Region 9 grew from 3,096 jobs (2016 Q4) to 3,190 (2018 Q4) or 3%. The five year average annual growth rate for the region is 1.9%.

The Biomedical and Biotechnology industry sector is comprised of eight different 4-digit NAICS industries. The largest sector of employment is in Scientific Research and Development Services (NAICS 5417) and Industrial Machinery Manufacturing (NAICS3332). Both sectors are also identified within Light Manufacturing and have LQ's of 1.97 and 1.91, respectively.

Frameworks

The established project frameworks will remain the same. They are in line with the statewide priorities of the GO Virginia Board

Framework Benchmarks

Through the research done for this plan update, some forward looking metrics and related sources have now been identified to help benchmark future growth and plan impact.



Talent Development

Credentials

An obvious source for tracking credentials is the regional community colleges. The following information was collated from information provided by GCC, LFCC, and PVCC. Collectively, these community colleges offer 235 distinct credentials in these areas: Agriculture, Food and Natural Resources; Architecture and Construction; Business, Management and Administration; Finance; Health Science; Information Technology; Manufacturing; Science, Technology, Engineering and Mathematics; and, Transportation,

Distribution and Logistics. Sixty one of the offered credentials can be identified as serving Region 9 Target Industries, including:

- Food & Beverage Manufacturing -1
- Financial & Business Services - 18
- Information Technology – 20
- Manufacturing – 22
- Biotechnology – 0

In the coming year, a General Certificate in Distilling will be added by PVCC and GCC targeting the Food and Beverage Manufacturing Industry. These additional certificates are supported by the Crafting Higher Paying Jobs and Adult Beverage Exports project.

Program/Degree Completions

Data available from JOBS EQ for 2016-2017 Academic Year indicates that there were 11,203 total academic awards. In this case, “awards” represent a wide range of achievements from a certificate requiring less than one year to earn to a doctorate level degree.

Among post-secondary programs at schools located in Region 9, a sampling of awards most linked to occupations relevant to GO Virginia Region 9 Clusters was developed. Note that some occupations serve more than one cluster, so they are counted twice. For example, a Chemistry award may support an occupations in Biotech and Light Manufacturing. There were 1,765 awards related to the Biomedical and Biotechnology; 2,454 were related to Financial and Business Services Industry; 2,422 were related to Food and Beverage Manufacturing; 2,304 were related to Information Technology; and, 1,968 were related to Light Manufacturing.

Internships and Apprenticeships

Sources for region wide internship and apprenticeship data were not identified. However, in seeking this data, the Council engaged with several partners who track some of this information and will continue working with them for finding sources. This challenge also presents an opportunity for developing a regional project proposal

For example, the Department of Labor and Industry, Division of Registered Apprenticeships provided the following summary as of June 24, 2019. At this time, we do not have information on what industries are targeted through these apprenticeships.

FIPS Code	County	#Sponsors	#Apprentices
003	Albemarle	24	54
007	Culpeper	22	70
065	Fluvanna	11	34
079	Greene	2	5
109	Louisa	30	37
113	Madison	2	7
125	Nelson	7	22
137	Orange	12	19
540	Charlottesville	60	291
061	Fauquier	12	26
	TOTAL	182	565

 **Startups/Innovation/Commercialization (Entrepreneurship Ecosystem)**

Patents Awarded

The TEconomy Entrepreneurship Ecosystem Assessment Presentation (TEconomy Assessment) for Region 9 (December 2018) indicates a significant level of patent activity each year. Though the number has dropped in 2017 to 421 from 567 in 2016, the number has remained above those reported in Virginia, as well as the US. As noted in the Assessment, the leading areas of patent activity from 2010 to 2017 has been in IT. Biotech is also well represented. Per the TEconomy Assessment, UVA generates around 30 plus patents per year. More specifically, UVA Licensing and Ventures Group (UVA-LVG) reports that 38, 43 and 59 patents issued for 2016, 2017, 2018 respectively. The UVA LVG data does not stipulate where these patents were issued.

Region 9	2014	2015	2016	2017
Patent Counts	459	477	567	421

New Business Formations

Region 9 new business formation rates were higher than the US and Virginia in 2007. However, formation rates have dropped off more sharply than Virginia and the US since about 2010. Region 9 has continued to trail Virginia since that time through 2017.

According to the BDRC Profile of Startup Activity in Region slide, included in the TEconomy Assessment, the number of startups in traded sector industries from 2007 to 2017 dropped from a high of 370 in 2007 to 148 in 2017. The average number of startups for that same time period was 234.

UVA -LVG reported five new ventures were created in 2016, seven were created in 2017 and three were reported for 2018. This information does not state where these ventures were created.

Licenses Generated Through Commercialized Research Increase in Investment/Funders

According to the Commercial Viability slide from the TEconomy Assessment, UVA generates an average licenses/options executed per \$10,000,000 of University Research from 2014-2016 of 1.81 in GO Virginia Region 9, which is better than the rest of Virginia at 1.12 and the US at 1.14.

UVA -LVG has provided key metrics they have tracked from 2006 to 2018. The information is included in the Appendix. Moving forward, UVA LVG intends to begin surveying for dollars invested in UVA LVG Seed Fund portfolio companies (alongside or subsequent to UVA LVG investments)(by fiscal year), and dollars raised (by fiscal year) by UVA LVG portfolio companies.



Growing Existing Businesses (Scale-Up Existing Clusters)

Number of Businesses Existing After 5 Years

According to the BDRC Profile of Startup Activity Trends slide in the TEconomy Assessment, of the 277 startups in traded sector industries from 2012, 132 still existed five years later in 2017 and employed 878.

Growth of Jobs from Small and Mid-Sized Companies

The number of jobs increased by 22,779 from 2016 to 2018 (YourEconomy.org). The largest growth in the region came from businesses with 2-9 Employees with 2,486 (5%) increase with growth in all localities in Region 9. Businesses with 100 - 499 added the second highest number of new employees for that time period at 2,362 (7%). However, this growth came primarily from Albemarle County and the City of Charlottesville, whereas, most other localities experienced a decline of jobs in that group. Businesses with 10-99 employees lost a cumulative of 1,309 jobs (2%) mostly driven by losses in the Counties of Albemarle, Culpeper, and Nelson and the City of Charlottesville.

New Clusters

Over the past two years, several opportunities have arisen that seemed to demonstrate economic opportunities in the region or sub-regions of GO Virginia Region 9. In some cases, specific projects were discussed but were unable to meet the guidelines established by the GO Virginia Board, in other cases the right project wasn't identified. These industries are being mentioned as they could present possibilities down the road with further empirical study. They are Hemp, Renewable Energy, Environmental Sustainability, and, Food Systems. Further study could be considered to determine the potential of these industries to make a transformational impact in the region through higher paying jobs in the traded sector.



Site Development

The Central Virginia Partnership, as the support organization for Region 9, has served as a critical partner in tracking and partnering to support regional Site Development. The Central Virginia Partnership and regional economic developers will continue to collaborate in updating site related metrics. The information in the table includes outcomes of the Central Virginia Site Readiness ECB project but does not yet include the 700 acre Regional Business Park project approved June 2019.

Region 9	As of August 2017	August 2017 to 2018
# of Tier 4 Sites	0	4
# Tier 4 Sites > 100 acres	0	2
# of Tier 4 Site Acres		634
# of Acres moved up at least one tier in Virginia Business Ready Site Program	n/a	979
# of Counties with Tier 4 Sites	0	3
# of Acres characterized	147	979
# of Sites characterized	1	10

Growth Plan Opportunities - Review and Update

The following is a review of grant and regional activity that supported the opportunities identified in the 2017 Plan, as well as rationale for the relevancy of those opportunities going forward. Updated Opportunities are also presented that will drive project development and activities over the next few years.



Talent Development

Local government and businesses are increasingly more aware of the importance to strategically cultivate a talented workforce. For example, the first project approved by the Region 9 Council was a collaboration between businesses and localities to develop the George Washington Carver Piedmont Technical Education Center (GWC PTEC) to host a welding certification program and a machinist's certification program. Graduates can expect to earn more than the average wage in the area it is located.

2017 Growth Plan - Opportunities

Develop Career Explanation and Awareness. At this time, working with high school students was not identified as a priority in the region. As regional and strategic talent development programs are in discussion, this is expected to change.

Strengthen Communication within the Talent Development System. The Virginia Career Works - Piedmont Region (VCW-Piedmont), formerly known as the Piedmont Workforce Network, has been through rebranding and capacity challenges. Therefore timing has not been right for a leadership role. Other partnership structures for driving a talent development system should be considered, at this time.

Develop Sustainable Sector-Based Strategies to Implement Talent Solutions. Individual companies are beginning to seek talent solutions and are reaching out to localities and the Central Virginia Partnership.

Develop and Promote Career Pathways. Without clear talent solutions developed for target industries, it was premature to address career pathways. However, some activity has occurred through community colleges, VCW-Piedmont and UVA. For example, in 2018 UVA's Office of Executive Vice President and Provost, Dual Career Program, has launched a website to assist faculty and employee partners connect with regional employers that typically offer higher paying jobs. The resource, www.Embarkcva.org, is community facing and available to all in the region. The Central Virginia Partnership links to the resource from their website.

2019 Growth Plan Update - Opportunities

Though some progress has been made in developing partnerships and resources for strategic talent development issues, much can be done. The Council will ensure activities align with SCHEV credentialing and the VCW-Piedmont Local Plan.

Support development of a regional workforce project to convene stakeholders for developing regional target sector based strategies.

Support growth of Information Technology, as well as all other target sectors, through a Tech Talent pipeline initiative.

Evaluate how credentialing, apprenticeship and/or internship programs for target industries could support higher paying jobs and/or growth of the traded sector.

Continue supporting and monitoring Talent Development projects including George Washington Carver-Piedmont Technical Education Center (GWC-PTEC), Central Virginia Cybersecurity, and Crafting Higher Paying Jobs and Adult Beverage Exports.



Growing Existing Businesses (Scale-Up Existing Clusters)

Projects awarded in any of the other three frameworks will likely serve existing businesses. However, existing businesses are so important to the region specific opportunities are being recognized.

2017 Growth Plan - Opportunities

Establish a Broadband Partnership. Broadband access is a critical economic development issue in most Region 9 localities, however, the GO Virginia Board is not funding such initiatives, at this time.

Concentrate on Innovation Corridor Branding. The GO Virginia Board does not fund projects for economic development marketing. Thus, instead, the Region 9 Council voted to refer to Region 9 as the Piedmont Opportunity Corridor and to use the moniker regularly. Also, the Council believes that initiatives that support the regional entrepreneurship ecosystem will advance the region's reputation as an area of innovation.

Harness Regional Assets to Develop and Promote Biotech Hub. The CvilleBioHub enhanced capacity grant is the first step in strengthening an organization that can likely lead this effort as a primary stakeholder.

2019 Growth Plan Update - Opportunities

More work can be done to identify needs of regional clusters for growing higher paying jobs and exports.

Support growth of biotechnology cluster to attain a critical mass of business, talent and intellectual property.

Support development of a large amount of new square footage serving the Biotech industry in a strategically concentrated area including wet lab space.

Identify scale-up opportunities in other targeted sectors, such as export growth for the Food & Beverage Manufacturing, Light Manufacturing, and Information Technology/Communications.

Monitor the opportunity for supporting broadband initiatives as the access to broadband is a critical need in most Region 9 localities.



Startups/Innovation/Commercialization (Entrepreneurship Ecosystem)

The Council has awarded three entrepreneurship related grants that are addressing some opportunities identified in the TEconomy Region 9 Assessment including: the Catalyst Accelerator Program, the Young Entrepreneurs Resource Guide, and CvilleBioHub, in addition to a Council Planning Grant to develop a business plan for an entrepreneurship ecosystem “gateway”, currently referred to as the “Venture Hub”. These projects were all approved to advance the region’s entrepreneurship ecosystem. The Council has decided to defer applying to the GO Virginia Board for entrepreneurship investment funds until the fall of 2019 when these projects will have advanced further.

2017 Growth Plan - Opportunities

Grow Entrepreneurship Ecosystem. As noted above, there has been significant interest and discussion about entrepreneurship and innovation opportunities in the region. The TEconomy Entrepreneurship Ecosystem Assessment for Region 9 was also completed in 2018.

Provide Tax Incentives for Investments in Local Startups. This recommendation has been incorporated into the opportunities outlined in the TEconomy Assessment for Region 9.

Provide Additional Capital for Expansion. This recommendation has been incorporated into the opportunities outlined in the TEconomy Assessment for Region 9.

2019 Growth Plan Update - Opportunities

The area of Startups/Innovation/Commercialization continues to be an area of major interest to the entire region. One challenge in the coming year will be balancing the needs and priorities for more rural counties with more populated areas. The Council will ensure alignment with the Virginia Research Investment Committee (VRIC), as appropriate.

Facilitate initiatives that advance opportunities outlined in the TEconomy Region 9 Assessment.

Review the opportunity for developing a plan to set aside specific Per Capita funds to invest in the entrepreneurship ecosystem as outlined by the GO Virginia Board.

Support development of a rural entrepreneurship coalition in rural counties.



Sites

Much progress was made in addressing site development since the 2017 Growth Plan was published. In fact, all opportunities identified in the plan were advanced. Sites in eight counties were collectively evaluated by one project led by the Central Virginia Partnership. Through this project, 485 acres in the region were moved up the site readiness scale to credible economic development sites. One of those sites is now designated a Tier 4 site. Two of the sites are over 100 acres and thus qualify for the Virginia Business Ready Sites Program (VBRSP).

2017 Growth Plan - Opportunities

Site Improvements for Specified Sites. Using with the sites assessments completed as part of the August 2017 Plan, the Central Virginia Partnership collaborated with regional partners to develop a “next-step” regional assessment project. The Central Virginia Site Readiness project was awarded \$54,225 for an enhanced capacity grant. Working with Draper Aden and ECS, sites in eight counties were evaluated and received some combination of review and evaluation to move them to credible economic development sites. This work included: environmental site assessment; wetlands delineation; geotechnical subsurface exploration; threatened and endangered species review; cultural historic resources review; final report; and site characterization letters to Virginia Economic Development Partnership (VEDP). Through this project, 485 acres in the region were moved up the site readiness scale and to credible economic development sites. One site, at the TE Lee Industrial Park in Orange County, is now designated a Tier 4 site. Two of the sites are over 100 acres, and as a result of this project, now qualify for VBRSP funding.

Better Leverage University of Virginia Research Park and Create & Promote Other Sites. Because of the renewed regional focus on site development there were three additional sites in the region that were concurrently advanced to Tier 4: a UVA Research Park site in Albemarle County and Crown Jewel and Wingspread sites in Culpeper County. Therefore, since the beginning of the enhanced capacity grant – the region went from zero Tier 4 sites to four Tier 4 sites.

Create & Promote Other Sites - Regional Business Park. Significant progress has been made this year towards establishing a regional business park in the future. After much hard work and deliberation over the past year, in January, Louisa County Supervisors decided to purchase just under 700 acres at I-64 Shannon Hill exit with a goal of developing it into a regional business park. To gain regional support for the park, the Central Virginia Partnership has joined forces with the County to meet with County Administrators/City Manager, local economic developers, elected officials and Economic Development Authorities. Louisa County has submitted a GO Virginia grant application for \$600,850, which was approved by Region 9 Council and the GO Virginia Board. The Partnership will contribute to this project on behalf of five localities. To date, the

County has spent \$2.6 million to purchase the property. The County has closed on the property, and rezoning has been approved.

2019 Growth Plan Update - Opportunities

Site readiness continues to be a major weakness in the Central Virginia region. To create higher-paying jobs and support economic diversification, construction-ready sites must be available to recruit new companies in targeted industries and help retain and grow existing companies in those industries.

In general, the Council should consider the region's best opportunities for joint site and infrastructure development when establishing their approach. Given that all sites in the Central Virginia Site Readiness ECB project were assigned tiers, advancing those sites to at least Tier 4 should be considered. The Council should also ensure that full advantage is taken of the Virginia Business Ready Sites Program and VEDP's current site characterization effort of 25+ acre sites.

Encourage and support the creation of a Regional Industrial Facilities Authority (RIFA) or equivalent regional collaborative partnership, as appropriate to support regional site development.

In collaboration with partners, outline a regional approach to address the region's site readiness needs by advancing sites through the VBRSP.

Support and encourage the continued development of the regional business park in Louisa County.

Advance further development of current sites and seek opportunities for regional collaboration on new sites.



Other

2017 Growth Plan - Opportunities

Realign organizational focus within the Central Virginia Partnership. The Central Virginia Partnership will have completed a new strategic plan by the publication of this report. As the support organization for GO Virginia Region 9, the opportunities and focus of the regional council were taken into consideration to optimize opportunities possible because of the GO Virginia initiative. Once published, this plan will support additional activities in this region.

Pursue Organizational Funding & Capacity Building Mechanisms for Plan Implementation.

Throughout the past year, the Region 9 Council along with the Central Virginia Partnership have met with County Administrators, Economic Development Offices, and Economic Development Authorities to promote and support the locality support for projects.

2019 Growth Plan Update - Opportunities

Review the 2019 Central Virginia Partnership Strategic Plan to identify areas for collaboration and efficiencies to drive the creation of high paying jobs and growing the traded sector in Region 9.

Explore opportunities to assess and support the development of emerging industries that could help the region grow high paying jobs and expand the traded sector (i.e. Hemp Industry, Renewable Energy Industry, and Environmental Sustainability Industry).

Partnerships

It has become all too apparent how important collaborative relationships with higher education, business and local government are to advancing GO Virginia projects. In Region 9, many relationships have already been in place through the Council's support organization, the Central Virginia Partnership. Additional partners are continually being identified to help advance opportunities in the plan.

The Central Virginia Partnership for Economic Development, as the support organization for Region 9, has been a critical supporter of the Region 9 Council. The regional council has benefitted greatly from the relationships already established by the Partnership throughout most of the Council footprint. For example, the regional economic development directors have been meeting on a regular basis and have been up to speed on the regional Council development, policy directions, priorities and projects. GO Virginia staff regularly attend these meetings to stay engaged.

County Administrators and Economic Development Departments – To date, localities have provided over \$3,365,150 in cash or in-kind toward projects in Region 9. Several Administrators and Economic Development Directors serve on the Central Virginia Partnership Board and/or the Region 9 Council. Many were part of the team that helped stand up the Region 9 Council and develop the 2017 Growth Plan, as well. Council and Partnership staff have met with County administrators and economic developers together on a yearly basis to ensure strategic initiatives are aligned, as much as possible. All eleven localities in Region 9 have participated in at least one grant proposal by either serving as the applicant, funding match requirements, or writing Letters of Support.

Planning Districts and VCW-Piedmont Region - The footprint of Planning District 9 and Planning District 10 together, and the entire territory of the VCW Piedmont Region align exactly with GO Virginia Region 9 footprint. These partners are a great asset for their knowledge of the region and as subject matter experts.

Private Sector- At this time, more than eleven businesses have been engaged directly with projects and provided over \$430,000 in project funding. Businesses are also serving on project advisory committees, as is the case for the Central Virginia Cybersecurity project, or providing matching funding and active partners, as is the case with the Crafting Higher Paying Jobs and Adult Beverage Exports Project. Private businesses have played a key role in supporting the CvilleBioHub and the George Washington Carver – Piedmont Technical Education Center projects, as well. In the coming year, as the region reviews Talent Development projects, substantially more business partners will be identified.

Higher Education – Cumulatively, higher education has supported five projects with \$425,000 in match funding.

Community Colleges – The three community colleges in Region 9 include, Germanna Community Colleges, Lord Fairfax Community College, and, Piedmont Virginia Community College. All three community colleges have been involved in regional projects and have been applicants on two projects. Two of the three community college presidents currently serve on the Region 9 Council. Their participation on the Council has been critical in talent development projects as well as understanding regional credentialing.

University of Virginia - UVA has been an important partner on several projects that are currently underway and will continue to be engaged in collaborative proposals. UVA's assistant vice president for economic development serves on the Region 9 Council. Other UVA faculty and staff are also engaged with the Council as applicants, subject matter experts, or supporters. For example, the Batten Institute for Entrepreneurship and Innovation at the Darden School of Business, i-Lab, the UVA Licensing and Ventures Group, and, UVA Career Services each have provided expertise on framework metrics or projects.

Regional Chambers of Commerce - Chambers and other convening organizations in target markets are the first avenue for engaging businesses and identifying potential council members. Since inception, regional chambers have been engaged in plan development. These organizations serve as a gateway mechanism to engage with business communities, as well.

Department of Housing and Community Development (DHCD) – As the support organization for the GO Virginia Board, DHCD is the first stop for determining project eligibility and obtaining feedback to improve project proposals. The DHCD team has been a true partner in navigating policy and helping to advance regional and programmatic objectives.

Non-profits and other organizations – These groups, specifically those engaged in the entrepreneurship ecosystem, also continually participate in conversations about potential projects and opportunities, including Fauquier Enterprise Centers, GMU Enterprise Center, CvilleBioHub, Blue Morning, CBIC, CIC, and Central Virginia Small Business Development Center, etc.

Project Development + Pipeline

Developing strong projects and project pipeline has been a top priority of the Region 9 Council since the Growth Plan was published in August 2017. In fact, the two community events where the Growth Plan was launched in August 2017 were the first of many steps taken to engage stakeholders that could help develop and drive projects.

The Region 9 Council has developed a proposal review process that has effectively supported eight projects from submission to approval. To comply with the GO Virginia Growth and Opportunity Act, applicants are to stipulate in their applications how their project aligns with the Region 9 Growth Plan in addition to the GO Virginia statewide objectives of creating higher paying jobs and developing new revenue from out of state resources. Additionally, each project is scored by subject matter experts serving on the Council using criteria established by the GO Virginia Board.

The Council has developed additional means for promoting regional GO Virginia project opportunities and discussions. The Council has established a website (www.GOVirginia9.org) and a LinkedIn account ([Linkedin.com/company/go-virginia-regional-9-council](https://www.linkedin.com/company/go-virginia-regional-9-council)) to engage stakeholders and share important information. Additionally, the Council collaborated with DHCD to promote statewide GO Virginia initiative during the Entrepreneurship Ecosystem Conference held on Friday, April 12 in Charlottesville, during the Tom Tom Founders Festival. Over 100 individuals attended a panel moderated by Tom Click, Region 9 Council Chair, titled: *“Envisioning a Statewide Entrepreneurship Ecosystem from the Ground Up.”* The panel included, John O. “Dubby” Wynne, presiding Chair, GO Virginia Board. The programming brought national attention to GO Virginia activities as well as engaged regional staff in discussions around ecosystems.

The process employed for applications is designed to ensure that those going through the application process are aligned with both Council and Board objectives. Staff will collaborate and support the applicant to ensure each proposal is best positioned to support required outcomes before the Council Task Force members review. Before a vote at a council meeting, all proposals are reviewed by a minimum of three subject matter experts from the Council. All members have access to review the proposal prior to a discussion and vote. An additional best practice is frequent communication with DHCD staff for feedback.

Additional steps the Council takes to drive projects is ensuring that Enhanced Capacity Building grants are on track for subsequent and larger implementation proposals, tracking all approved projects to identify best practices and potential partnerships for inter-regional proposals, and, expanding public engagement outreach.

The Central Virginia Site Readiness ECB grant was the first grant completed in Region 9. This project has directly supported the conversation and understanding of the importance of site development in our region. In fact, activities related to this project have helped drive the regional support for the Regional Business Park project approved in June 2019 as well as advanced the conversations for supporting a Regional Industrial Facility Authority (RIFA), or equivalent regional collaborative partnership, in Region 9.

The CvilleBioHub ECB grant has enabled that organization to double the number of identified and engaged biotech related businesses in this area and perform crucial data analysis on this industry. A subsequent grant is expected in the Fall 2019 that will drive growth.

The Central Virginia Cybersecurity Partnership is advancing a cybersecurity curriculum across three regional community colleges. A follow on project will likely be for regional implementation or interregional expansion.

For the most part, all successful proposals to date, have been brought forward through the networks of Council members, staff, and others connected to the Region 9 Council. Going forward the Council expects to drive more community and business engagement through regional outreach efforts.

Since 2017, the Region 9 Council has approved three ECB grants. One grant, the Central Virginia Site Readiness project, is completed and has set the stage for additional site projects. The Central Virginia Cybersecurity project and the CvilleBioHub project are both making strides and follow-on grant proposals are expected.

Potential Sources of Matching Funds

Throughout the past year, in collaboration with the Central Virginia Partnership, GO Virginia staff has met with County Administrators and other stakeholders to discuss the possibility to set aside funds for potential GO Virginia projects in addition to promoting the GO Virginia opportunity.

The Council has also provided a link to the Grants Database on the GO Virginia website (govirginia.org). Additionally, the Council will explore possible opportunities with private foundations for supporting regional projects.

Other Initiatives to Grow Higher Paying Jobs

While the GO Virginia Region 9 Council is the only regionally focused organization with funding available to incentivize collaboration to grow higher paying jobs, other initiatives exist that support or complement the efforts of the Council.

During the past year, the Central Virginia Partnership has undergone a strategic planning process that was completed in June 2019. The Council will review opportunities for synergy and collaboration. Other plans meaningful to growing jobs in this region include: the Local Plan for Virginia Career Works – Piedmont Region, county economic development strategic plans, and the University of Virginia (UVA) strategic plan in development.

The VCW-Piedmont Region Local Plan (vcwpiedmont.com) identifies four priority industries for workforce development including: Business & Financial Services, Information Technology, Health Services, and Manufacturing/Distribution. With the exception of Health Services, these industries align with the target industries in Region 9. Additionally, the Council recognizes that VCW – Piedmont Region programming, at this time, targets a range of jobs supporting these industries that are below the average annual wages in the region and therefore are not high paying jobs as defined by GO Virginia. That said, efforts align to support important industries.

Also, of importance to this region and the Commonwealth, the UVA Board of Visitors has endorsed the draft goals and sub-goals of a new strategic plan. Within those sub-goals is a statement to “Lead economic development through academic discovery and entrepreneurship.” Clearly, more opportunities will arise from this stated direction as this plan develops. In the meantime, the mission of UVA Economic Development (economicdevelopment.virginia.edu) is supportive and critical to partnerships that support growth in our region.

Stakeholder Engagement for Growth Plan Update

At the February 2019 Region 9 Council Meeting, Council members and guests in the audience participated in task force breakout sessions to review successes in 2017 and to recommend suggestions for new opportunities. The group discussions were focused on the four framework areas: Sites, Talent Development, Growing Existing Businesses, and Innovation & Entrepreneurship. Each group reported out and feedback was discussed.

Staff at the Central Virginia Partnership provided data and feedback.

The Region 9 Council Executive Committee provided input ahead of the May 2, 2019 Council meeting where a draft plan was presented to the Council along with a stakeholder engagement plan and

timeline. The feedback from that meeting was incorporated into a new draft and then the draft report was posted for public comment.

The plan was posted on the Region 9 website and access to the plan for comment was promoted through all regional economic development partners, planning districts, grant recipients, chambers of commerce, etc. The opportunity to comment on the draft was also shared via the Region 9 LinkedIn page.

After assimilating public comments, the final draft was presented to the Executive Committee for final approval on July 22, 2109.

Metrics and Data Sources Table

In order to facilitate the process of updating metrics over time, this table has been prepared to summarize data sources. Specific datasets can also be found in the Appendix.

General	
Annual change in average annual wages	JOBS EQ
Growth of key employment sectors	JOBS EQ
Job growth year by year and cumulative	JOBS EQ
How changes in employment and wage patterns have impacted regional growth	JOBS EQ
Change in the number of jobs supported through revenues derived from out-of-state sources (targeted traded sector)	JOBS EQ
Workforce Gap Analysis	JOBS EQ
Frameworks	
TALENT DEVELOPMENT	
# of Credentials	PVCC, GCC, LFCC
# of Program /Degree Completion in areas tied to regional clusters	JOBS EQ
# of Internships & Apprenticeships offered	Division of Registered Apprenticeship, Department of Labor and Industry
START UPS	
# of Patents Awarded, new business formations	TEconomy Assessment Presentation Region 9
# Licenses Generated Through Commercialized Research Increase In Investment/Funders	UVA LVG
SCALE UPS	
# of Business Existing after 5 years	TEconomy Assessment Presentation Region 9
Growth of Jobs from Small and Mid-sized companies	Youreconomy.org
Increase in Clusters	JOBS EQ
New Clusters	JOBS EQ
SITE DEVELOPMENT	
# of sites characterized	Central Virginia Partnership; Regional Economic Development Partners
# of Tier 4 or higher sites	Central Virginia Partnership; Regional Economic Development Partners
Total acreage of sites characterized	Central Virginia Partnership; Regional Economic Development Partners
Localities participating in a RIFA/revenue sharing agreement	Central Virginia Partnership; Regional Economic Development Partners
Increase in prospect inquiries	Central Virginia Partnership; Regional Economic Development Partners